OpenIZ Administration Portal

User Manual

Prepared By

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Table of Contents

Versioning History

Version	Date	Author	Notes
1.0	04/24/2017	Justin Fyfe & Nityan Khanna et al.	Creation
1.1	5/11/2017	Michael Szucsik & Zoltan Jakab	Edits & Export
1.2	6/2/2017	Zoltan Jakab & Michael Szucsik	Revisions
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1.4	8/2/2017	Michael Szucsik	Updates

Chapter 1: Introduction to the OpenIZ Administration Portal

1.1 What is OpenIZ?

The **OpenIZ** (**Open Immunize**) Administration Portal is a powerful web tool that allows healthcare administrators to access, create, and modify immunization data stored on central servers. OpenIZ provides comprehensive tracking of all data related to the administration of vaccinations. It comprises the back-end database, cloud storage, and web tools supporting the **Tanzanian Immunization Registry** (**TImR**).

OpenIZ provides a single consistent Immunization Management System which allows development teams to customize local instances. Through its *global back-end / local front-end* approach, OpenIZ builds local in-country capacity while supporting immunization campaigns.

Because OpenIZ can track sensitive information related to a patient's health status, it has been built from the ground up with privacy enforcement and security considerations.

OpenIZ is created and supported by Mohawk College's **mHealth and eHealth Development and Innovation Centre**. Located in Hamilton, Canada, **MEDIC** is an internationally renowned applied research centre in digital health that helps companies, not-for-profits, and government organizations develop and implement innovative digital health solutions to improve patient care.

1.2 Getting Started: Browsing to OpenIZ

The TImR Web Portal is accessed through a **web browser** (*such as Internet Explorer, Mozilla Firefox, or Chrome*).

To access the OpenIZ Administration Portal, you will need to enter the URL of the portal.

Step 1: Open your web browser.

Step 2: In the URL address field, enter the address of the OpenIZ Administration Portal (http://timradminintl.marc-hi.ca) and press **Enter** (See the figure below)

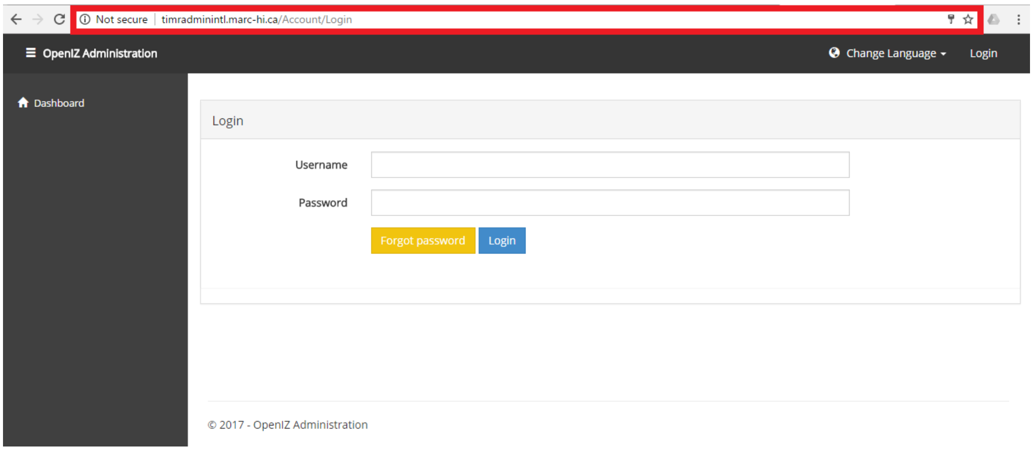


Figure 1.1 - Enter the address here and you will be directed to the login page.

1.3 Selecting a Language

You are able to switch languages to view this portal in either English or Swahili. To change languages:

Step 1: Select the **Change Language** drop-down and choose your preferred language (See the figure below)

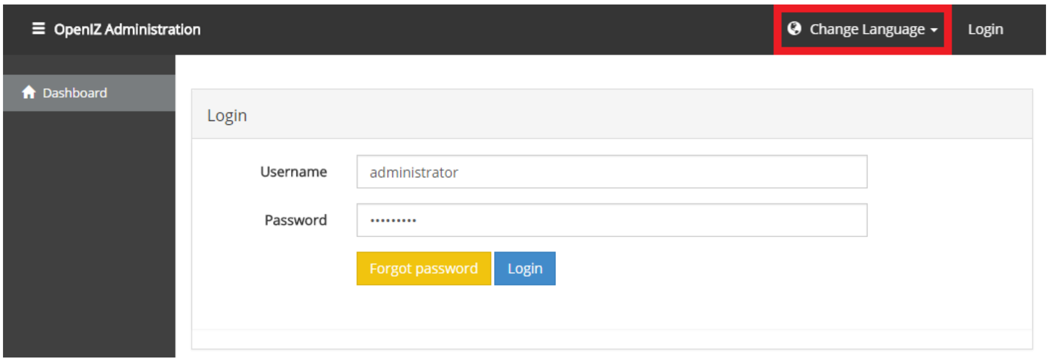


Figure 1.2 - Change Language button

1.4 Joining a Realm

If you are not connected to a realm, see section 19.2 (**Joining a Realm**) for more information.

1.5 Logging In

To log in you must have a valid administrator-level **Username** and **Password**.

Step 1: Type in a valid **Username** and **Password** into the corresponding fields.

Step 2: Click the **Login** button

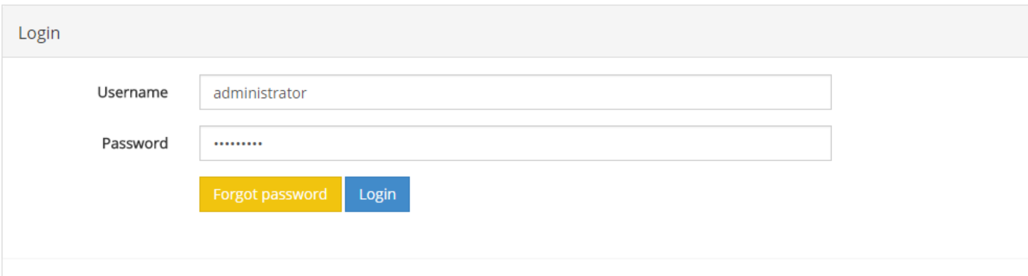


Figure 1.3 - Enter a valid Username and Password to access the OpenIZ Administration Portal

After logging in you will be brought to the Dashboard.

1.6 Logging Off ➡️

To log off:

Step 1: Click the button in the top right corner of the OpenIZ Administration portal labelled **Log off** (See figure below)

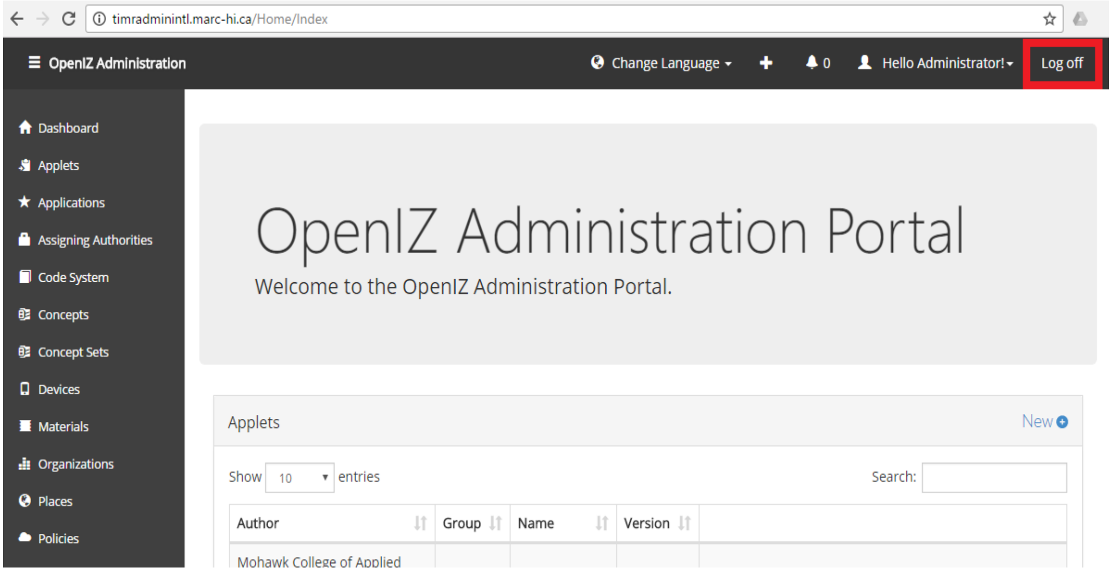


Figure 1.4 - OpenIZ Administration Dashboard, Logging off

1.7 Forgot password

If you have forgotten your password follow these steps:

Step 1: Select **Forgot password** button (See the figure below)

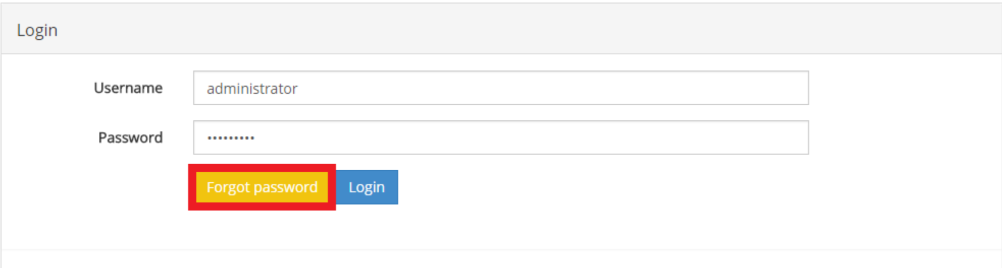


Figure 1.5 - Login page forgot password

Step 2: Type in your username into **Username** field and click **Next** button

Step 3: Select either **Send me an E-Mail** or **Send me an SMS** (See the figure below)

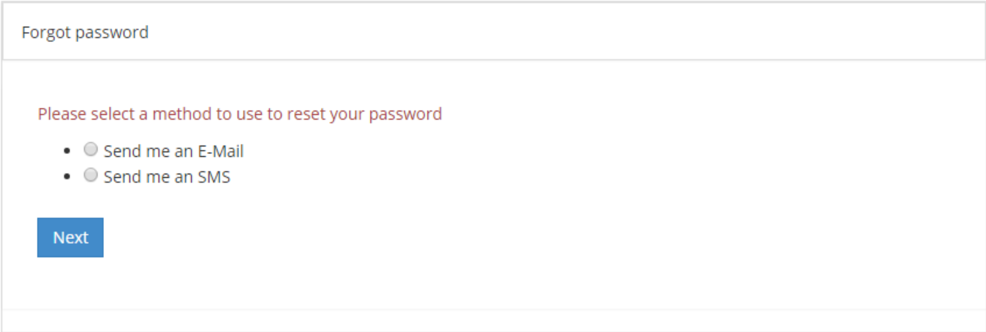
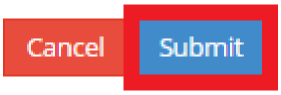


Figure 1.6 - Forgot password recovery method

Step 4: Enter either the first part of your email i.e. 'john.smith' if you selected email, or enter the last 4 digits of your phone number if you selected SMS into the **Verification** field, press the **Submit** button



Step 5: An e-mail or SMS message will be sent to the matching recovery e-mail or mobile phone, copy the recovery code you received

Step 6: Set a new password by entering it into the **New Password** field and reentering it in the **Confirm Password** field

Step 7: Click **Done** to set your new password

Chapter 2: The Navigation Toolbar ☰

After logging in you will be brought to the Dashboard, you will have a navigation toolbar at the top of the screen and the side menu along the left side of the screen. (See the figure below)

2.1 Overview ☰

The toolbar has some basic features related to your account or preferences.

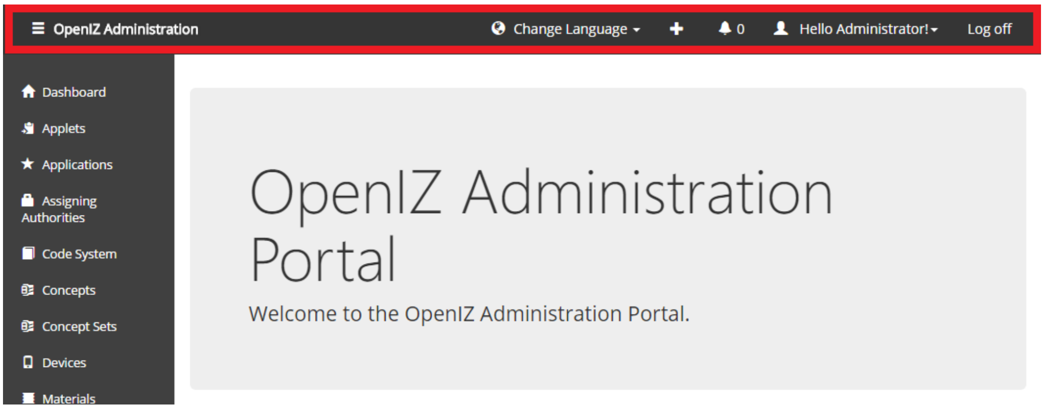


Figure 2.1 - OpenIZ Administration dashboard – Navigation Toolbar

The right side of the **Navigation Toolbar** contains various modules, from left to right (See the figure above):

- **Changing Language -** Change your current language to one of **English** or **Kiswahili**
- **New Alert -** The creation of user-specific or system wide alerts
- **Viewing Alerts -** The location to view pending alerts
- **Accessing the User Profile -** An area where you can **change your password** or **update your profile**
- **Logging off -** Allows you to securely log off of the portal

2.2 Change Language

Just like the logging page you are able to switch languages to view this portal in either English or Swahili. This option is available throughout the whole webpage.

To change languages:

Step 1: Select the **Change Language** drop-down and choose your preferred language. (See the figure below)

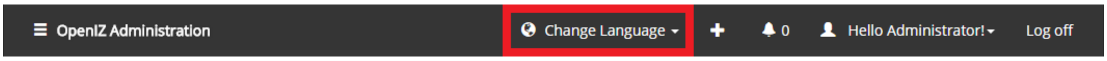


Figure 2.2 - OpenIZ Administration dashboard - Toolbar

2.3 New Alert ✚

This button will open the **Create Alert** page. See the section below for more information on creating and viewing alerts. (See the figure below)

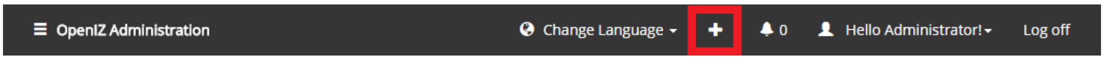


Figure 2.3 - New alert button

2.4 Alerts

This button will take you to the **Alerts** page. The number next to the **Alerts** icon represents your unread alerts. (See the figure below)

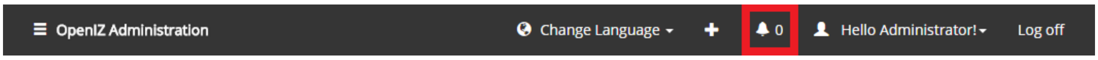


Figure 2.4 - Alerts button

From the **Alerts** page you can create, search, view, acknowledge and delete alerts. (See the figure below)

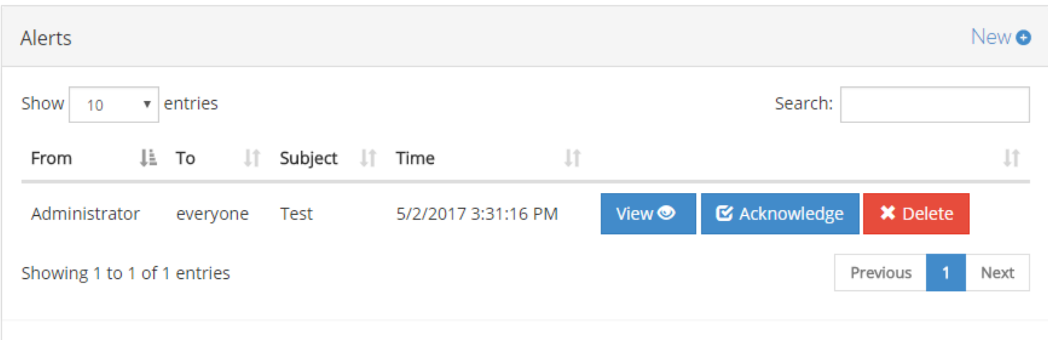


Figure 2.5 - Alerts page

2.4.1 Creating a New Alert

The page you are brought to will have 4 fields and a checkbox (See the figure below):

- **To -** The recipient
- **System Broadcast**
- **Subject -** A brief statement or phrase about the message
- **Priority -** determines the importance of the message
- **Message -** the actual message body

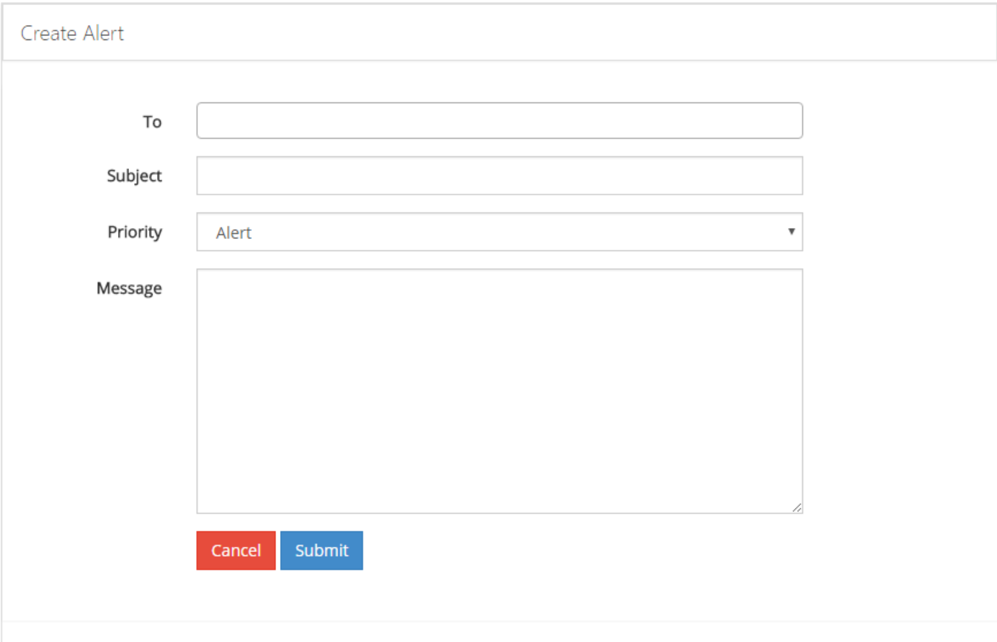


Figure 2.6 - Create Alert page

Step 1: Enter the username of the single recipient who will receive your alert

> **Note:** The web portal will automatically search for users as soon as you've typed in at least 3 characters. After the specified user is found, hit enter to place them into the field

Step 2: If you would like to send the alert to all users in the system, select the option to broadcast this alert to everyone (See the figure below)

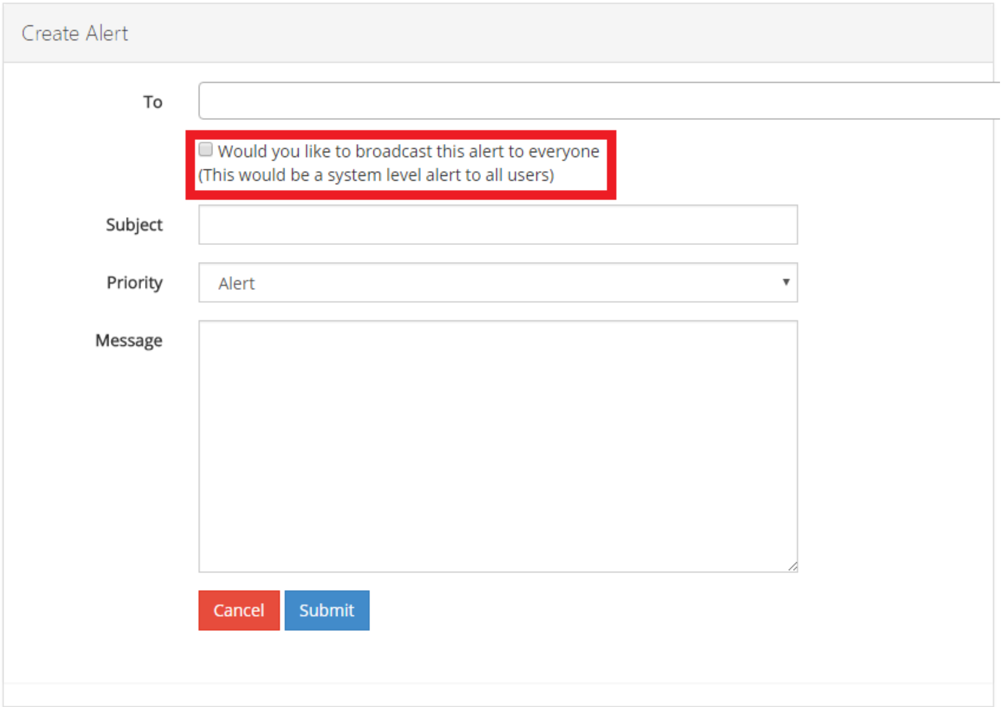


Figure 2.7 – System-wide alert checkbox

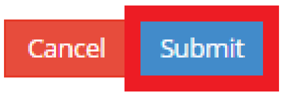
> **Note:** Setting the priority to **System** will override the recipient field and will instead broadcast your message to **ALL** users on the system

Step 3: Write the subject header of your message. This will summarize your message into a few key words

Step 4: Set the message priority to **Alert, High Priority**

Step 5: Enter the message you want to send to the recipient(s)

Step 6: Press the **Submit** button



2.4.2 Searching for an Alert

If you have unacknowledged alerts you can search for a specific one by using the search bar on the top right of the **Alerts** page.

Step 1: Start typing a **Username** or **Subject** in the search bar, results will be filtered as you type (See the figure below)

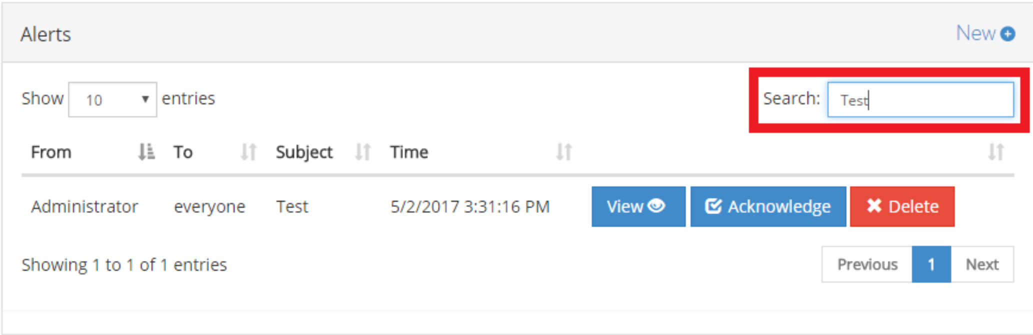


Figure 2.8 - Filtering alerts

2.4.3 Viewing an Alert

If you have new alerts available that have not yet been marked as acknowledged you can view them for more details about the alert and see the message attached.

Step 1: Click on the **Alerts** 🔔 icon to open the **Alerts** page

Step 2: Find the alert you want to open and click the **View** 👁 icon, the alert you selected will be displayed (See the figure below)

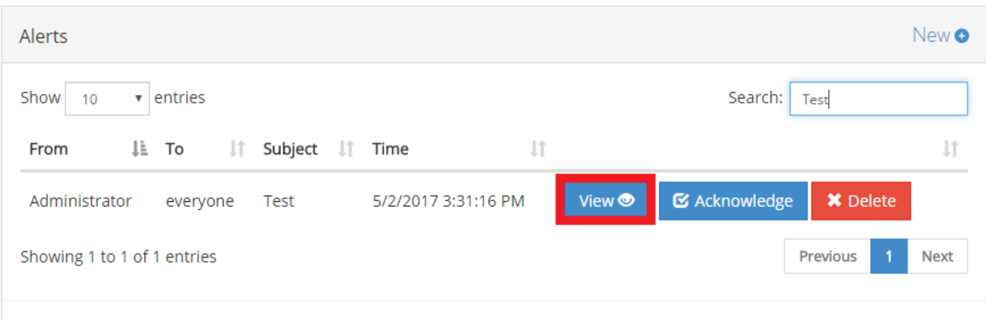


Figure 2.9 - Viewing alerts

2.4.4 Acknowledging an Alert

Once you are finished with an alert, you can remove it from your **Alerts** page by acknowledging it.

Acknowledge from the Alerts page:

Step 1: Click on the **Alerts** 🔔 icon to open the **Alerts** page

Step 2: Find the alert you want to remove and click the **Acknowledge** ☑ button to acknowledge the alert (See the figure below)

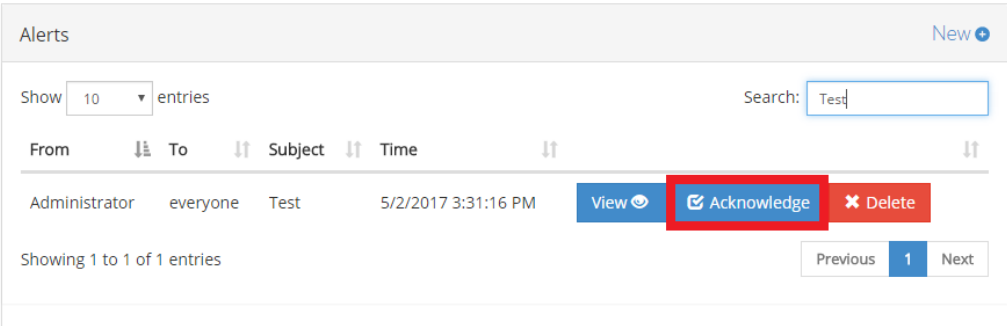


Figure 2.10 - Acknowledging alerts

Acknowledge while viewing the Alert:

Step 1: Click on the **Alerts** 🔔 icon to open the **Alerts** page

Step 2: Find the alert you want to open and click the **View** 👁 icon; the alert you selected will be displayed

Step 3: Click either the **Acknowledge** ☑ button to acknowledge the alert, or the **Cancel** button to remove the alert (See the figure below)

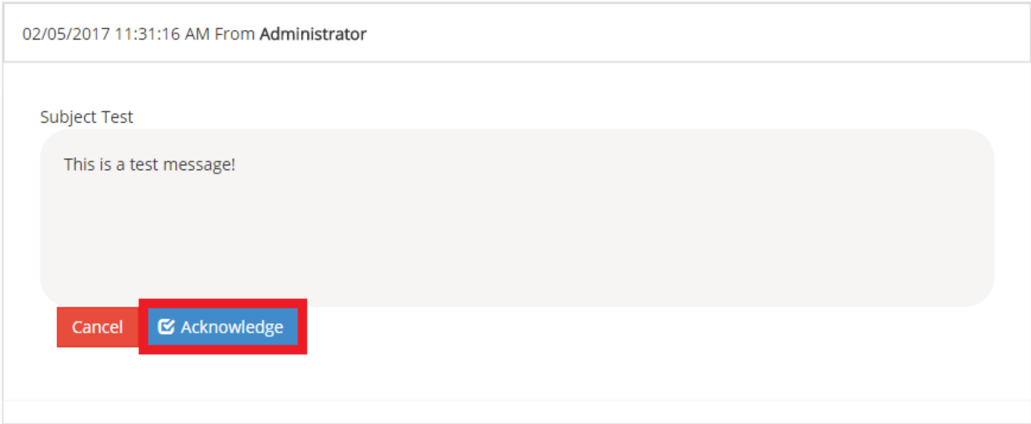


Figure 2.11 - Acknowledging an alert while viewing the alert

2.4.5 Deleting an Alert

You can choose to delete an alert without acknowledging it. This will remove the alert from your **Alerts** page.

Step 1: Click on the **Alerts** icon to open the **Alerts** page

Step 2: Find the alert you want to remove and click the **Delete** button to remove the alert (See the figure below)

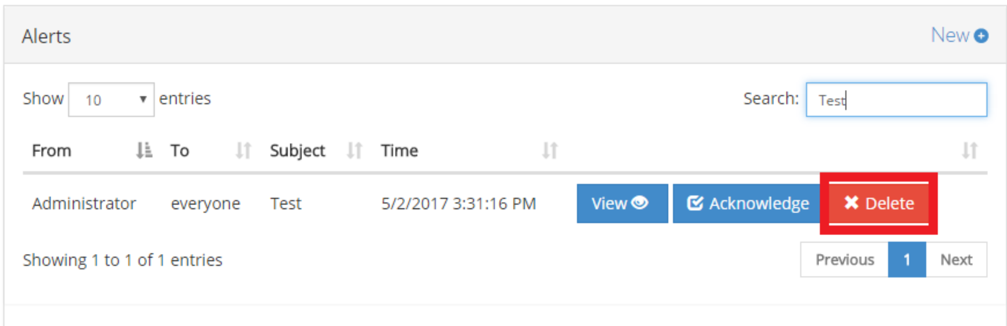


Figure 2.12 - Deleting an alert

2.5 User Preferences

The User preferences drop-down will be displayed as **Hello Username!** This menu lets you choose from two options: **Change Password** and **Update profile**.

2.5.1 Change Password

You can change the password for your account at any time.

Step 1: Click on the 👤 **Hello Username!** Drop-down menu

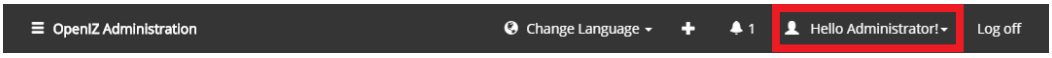


Figure 2.13 - User preferences button

Step 2: Select **Change Password**, the **Change Password** page will load

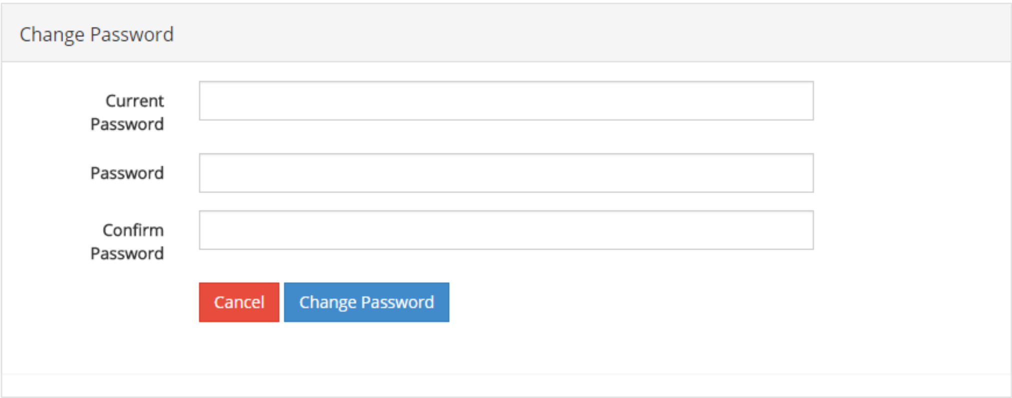


Figure 2.14 - Change password page

Step 3: Enter in your current password in the **Current Password** field (Required)

Step 4: Enter in your new password in the **Password** field (Required)

Step 5: Re-enter your new password in the **Confirm Password** field (Required)

Step 6: Press **Change Password**

2.5.2 Update Profile

With **Update Profile** you can make changes to your personal information, change facilities and set language preferences.

Step 1: Click on the **Hello Username!** Drop-down menu (See the figure below)

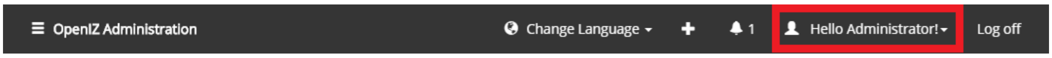


Figure 2.15 - User preferences button

Step 2: Select **Update profile**, the **Update profile** page will load

Step 3: Here you can make any changes you wish:

- Email (Required)
- Given Name
- Surname
- Facility

Note: Enter 4 or more characters to search for a facility

- Language (Required)
- Phone Type
- Phone

Note: This can be Phone number/Fax number/Pager number or others.

Step 4: Press **Save**

2.6 Logging Off

The **Log off** button in the toolbar allows you to log out from the OpenIZ Admin portal securely. This will be available anywhere while browsing any page in the portal.

See the **Logging off** section in **Chapter 1** for more information.

Chapter 3: The Side Menu ≡

The side menu provides you links to pages that allow you to access and control various objects that are used in the TImR system. (See the figure below)

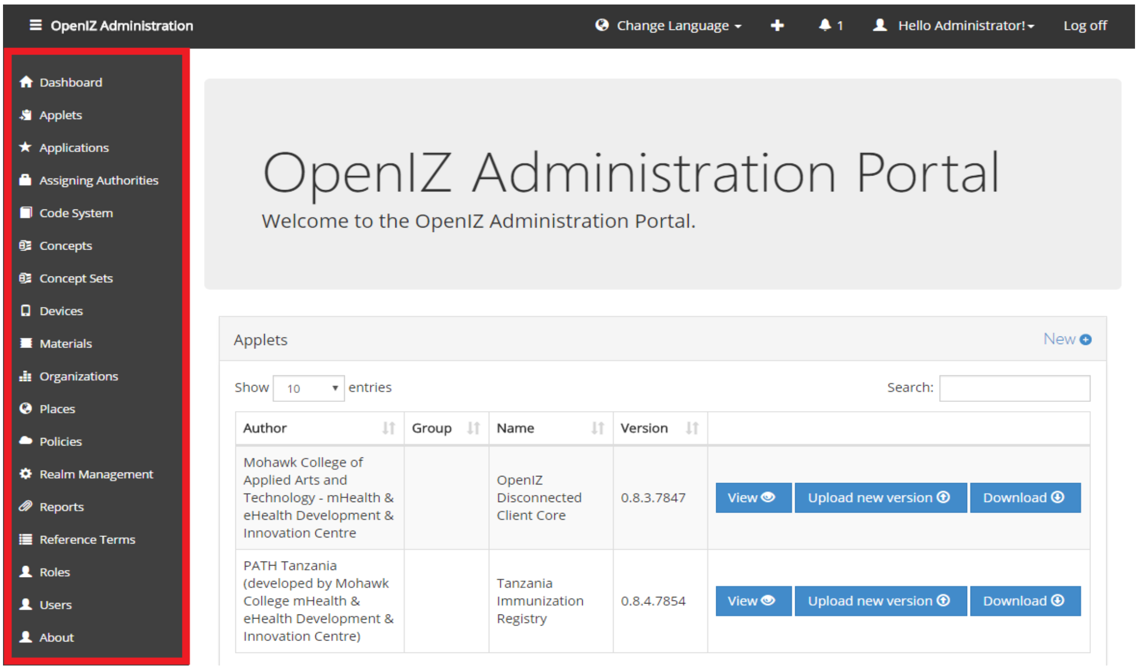


Figure 3.1 - Side Menu

The **Side Menu** may appear different depending on the roles/policies applied to the user account. For a brief guide on creating custom roles for users to customize functionality, see the **Sample User: Report Admin** section below within this chapter.

Below is a list of all currently available options that may appear in the Side Menu:

3.1 Dashboard

The **Dashboard** is the welcome page of the OpenIZ Administration Portal. A few key objects are seen here including applets, certificate requests, devices and roles.

For more detailed information about the dashboard see the **Dashboard** section below.

3.2 Applets

The **Applets** page will display a list of Applets currently installed, who created them, version information and more. From here you can add new applets or manage applets already installed.

For more detailed information about the **Applets** page see the **Applets** section below.

3.3 Applications ★

The **Applications** page provides you with a search feature to search for any applications installed on the system. You can also add new applications or manage applications already installed.

For more detailed information about the **Applications** page see the **Applications** ★ section below.

3.4 Assigning Authorities

The **Assigning Authorities** page provides you with a search feature to search for any assigning authorities currently implemented in the system. You can also add new assigning authorities or manage assigning authorities already implemented.

For more detailed information about the **Assigning Authorities** page see the **Assigning Authorities** section below.

3.5 Certificates

The **Certificates** page provides a list of certificate requests. From here you can accept and reject certificates.

For more detailed information about the **Certificates** page see the **Certificates** section below.

3.6 Code System

The **Code System** page provides you with a search feature to search for any code systems currently implemented in the system. You can also add new code systems or manage code systems already implemented.

For more detailed information about the **Code System** page see the **Code System** section below.

3.7 Concepts

The **Concepts** page provides you with a search feature to search for any concepts currently implemented in the system. You can also add new concepts or manage concepts already implemented.

For more detailed information about the **Concepts** page see the **Concepts** section below.

3.8 Concept Sets

The **Concept Sets** page provides you with a search feature to search for any concept sets currently implemented in the system. You can also add new concept sets or manage concept sets already implemented.

For more detailed information about the **Concept Sets** page see the **Concept Sets** section below.

3.9 Devices

The **Devices** page provides you with a search feature to search for any devices registered on the system. You can also add new devices or manage devices currently registered.

For more detailed information about the **Devices** area see the **Devices** section below.

3.10 Extension Types

The **Extension Types** page provides you with a search feature to search for any extension types on the system. You can also add extension types or manage the extension types currently registered.

For more detailed information about the **Extension Types** page see the **Extension Types** section below.

3.11 Manuals

The **Manuals** page provides you a list of manuals currently available for the system and applications (including this manual). You can also add new manuals or manage these manuals.

For more detailed information about the **Manuals** page see the **Manuals** section below.

3.12 Materials

The **Materials** page provides you with a search feature to search for any materials currently available on the system. You can also add new materials or manage these materials.

For more detailed information about the **Materials** page see the **Materials** section below.

3.13 Organizations

The **Organization** page provides you with a search feature to search for any organizations currently registered with the system. You can also add new organizations or manage organizations that are already registered

For more detailed information about the **Organizations** page see the **Organizations** section below.

3.14 Places

The **Places** page provides you with a search feature to search for any places that are currently registered with the system. You can also add new places or manage the places that are already registered.

For more detailed information about the **Places** page see the **Places** section below.

3.15 Policies

The **Policies** page provides you with a search feature to search for any policies that are currently implemented in the system. You can also add new policies or manage the policies that are already implemented.

For more detailed information about the **Policies** page see the **Policies** section below.

3.16 Realm Management

The **Realm Management** page displays the current realm information and provides the ability to **Leave the current realm** and join another.

For more detailed information about the **Realm Management** page see the **Realm Management** section below.

3.17 Reports

The **Reports** page provides you with a search feature to search for any reports that have been generated. You can also view and manage these reports.

For more detailed information about the **Reports** page see the **Reports** section below.

3.18 Reference Terms

The **Reference Terms** page provides you with a search feature to search for any reference terms that are currently implemented in the system. You can also add new reference terms or manage the reference terms that are already implemented.

For more detailed information about the **Reference** page see the **Reference** section below.

3.19 Roles

The **Roles** page provides you with a search feature to search for any roles currently implemented in the system. You can also add new roles or manage the roles that are already implemented.

For more detailed information about the **Roles** page see the **Roles** section below.

3.20 Users

The **Users** page provides you with a search feature to search for any users currently registered in the system. You can also add new users or manage the users that are already implemented.

For more detailed information about the **Users** page see the **Users** section below.

3.21 About

The **About** page provides you with all versioning information for all components of the system. You can also access the **Submit Bug Report** page from this page.

For more detailed information about the **About** page see the **About** section below.

3.22 Sample User: Report Admin

Not every user should have access to all functions available in the OpenIZ portal.

An example of a full admin account would have all the functions listed in the figure below (See the figure below). This would not be useful for the various types of roles.

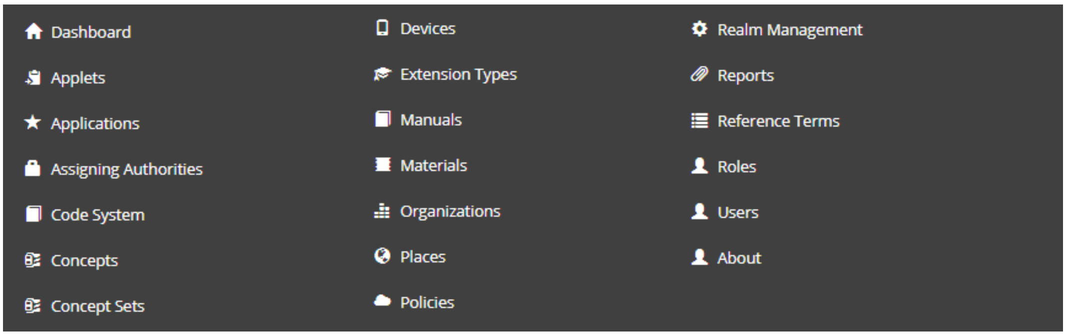


Figure 3.2 – Side Menu options

Custom role(s) can be created for different types of user accounts to only see and have access to specific options in the side menu.

A sample user account may be a **Report Admin**, with limited access only able to view **Reports**.

To create a **Report Admin** user:

> **Note:** You need be have full administrator status, or at minimum the ability to create policies, roles and users.

Firstly, we need to create a role to allow access to the reports.

Step 1: Click to **Roles** button to view the **Roles** page, at the top right of the **Search Role** area click on the **New** button (See the figure below)

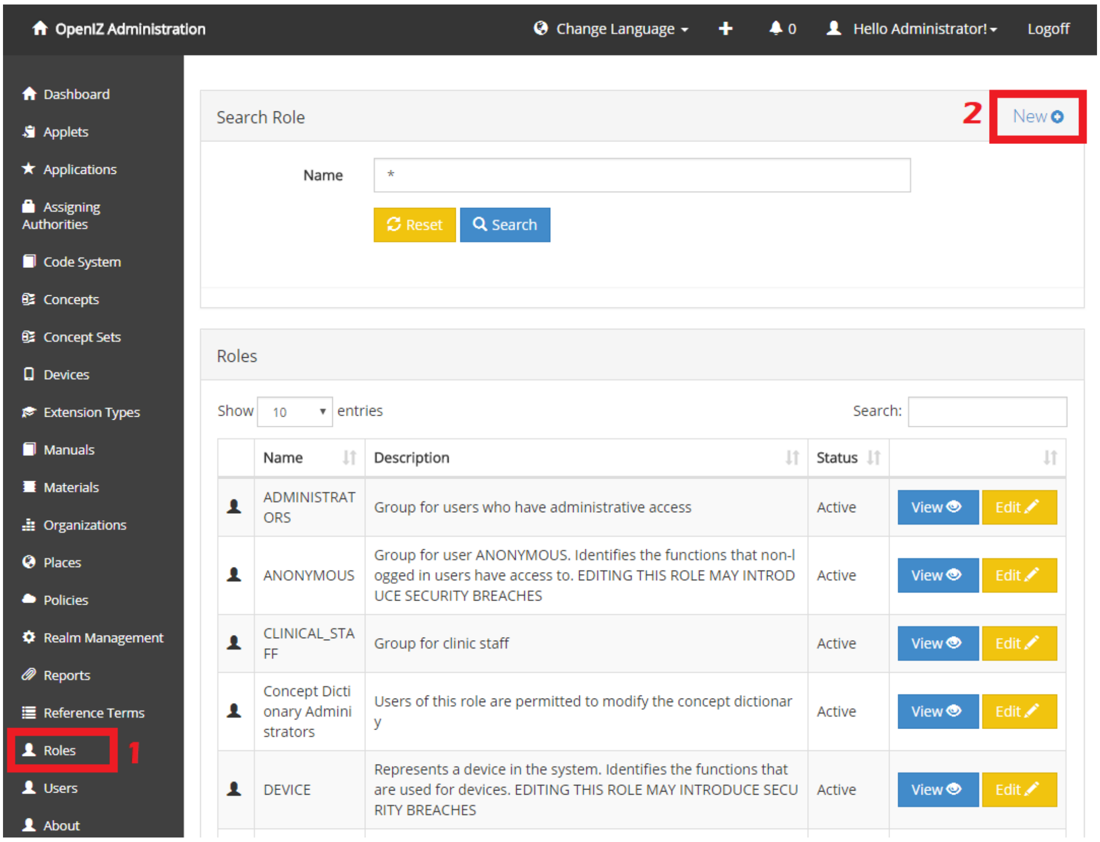


Figure 3.3 – New Role

Step 2: Fill out a name and description for the role, then press the **Submit** button (See the figure below)

- In this example we use *Name: ReportAdmin*

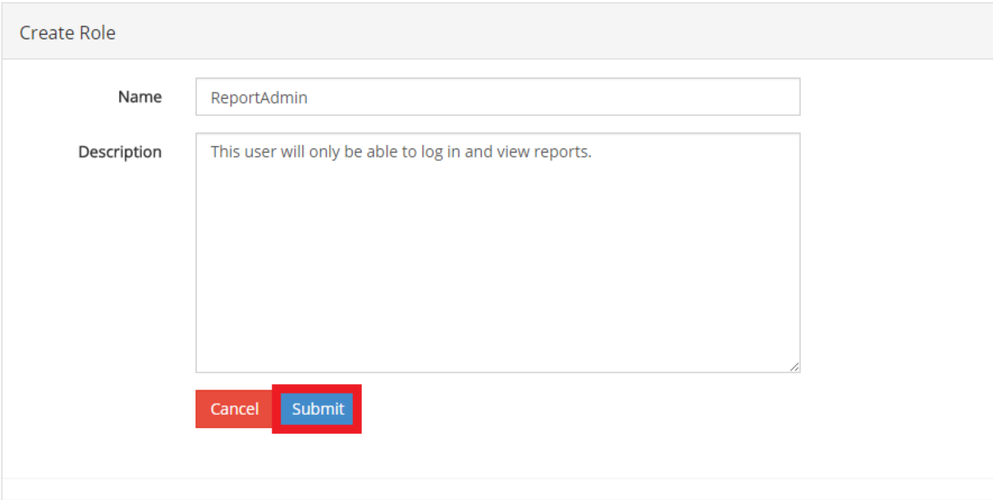


Figure 3.4 – Creating a new role

The new **ReportAdmin** role will be created, next we need to add policies to the role to give it special privileges.

After creating the new role you will be on the **View Role** page of the newly created role. To add policies:

Step 3: In the top right corner of the **View Role** area press the **Edit** button (See the figure below)

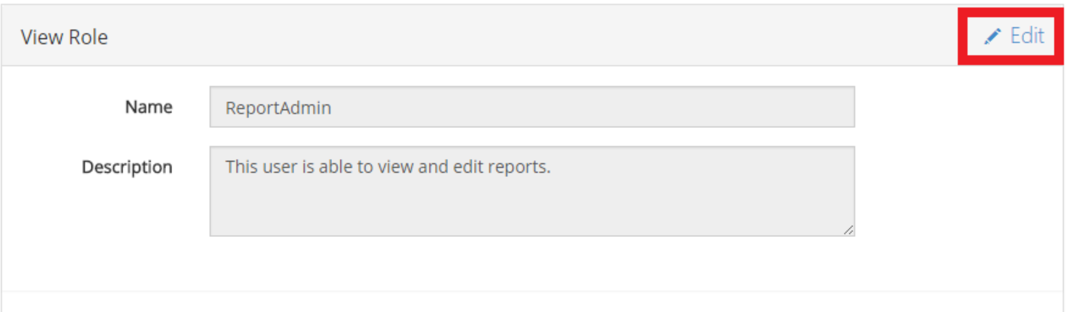


Figure 3.5 – View role: Edit button

You will be brought to the **Edit Role** page for the **ReportAdmin** role.

Step 4: Click anywhere in the white space of the **Policies** field to view the drop-down menu, either start typing **Login** or find it in the list (See the figure below)

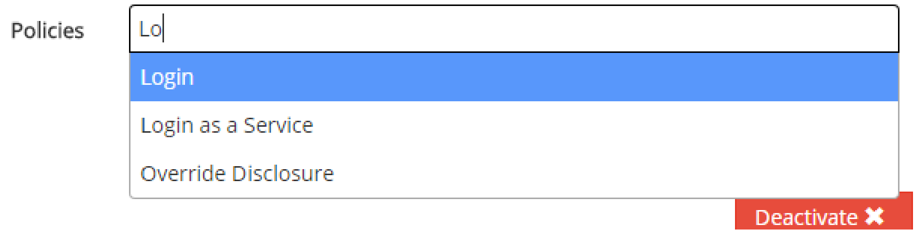


Figure 3.6 – Adding policies

Step 5: Repeat the previous step to add **Unrestricted Data Warehouse** (See the figure below)

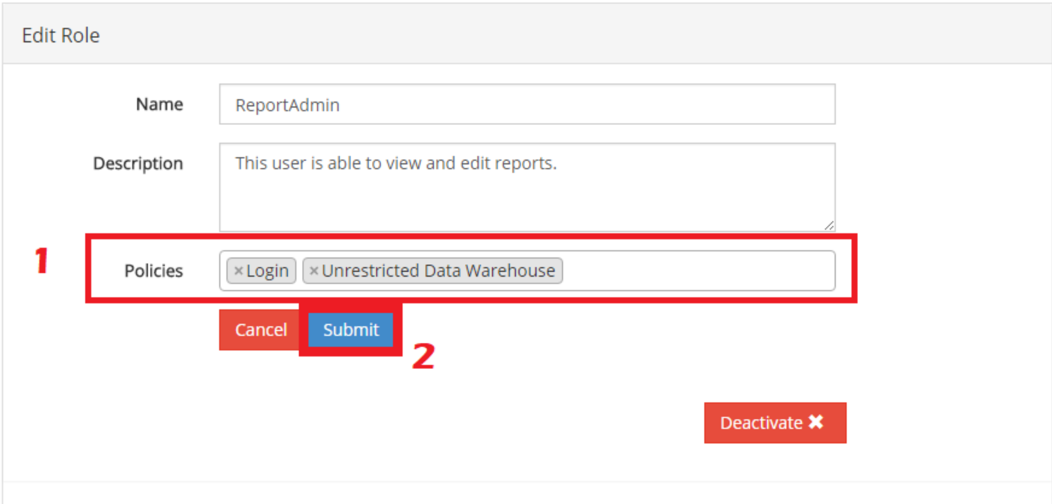


Figure 3.7 – Adding policies to a role and submitting the changes

Step 6: Press the **Submit** button to finish creating the role (See the figure above)

The **ReportAdmin** role will now be able to log in to **OpenIZ** and view the **Reports** page. Now we just need a user account to add the role to.

Step 7: Click to **Users** button to view the **Users** page, at the top right of the **Search User** area click on the **New** button (See the figure below)

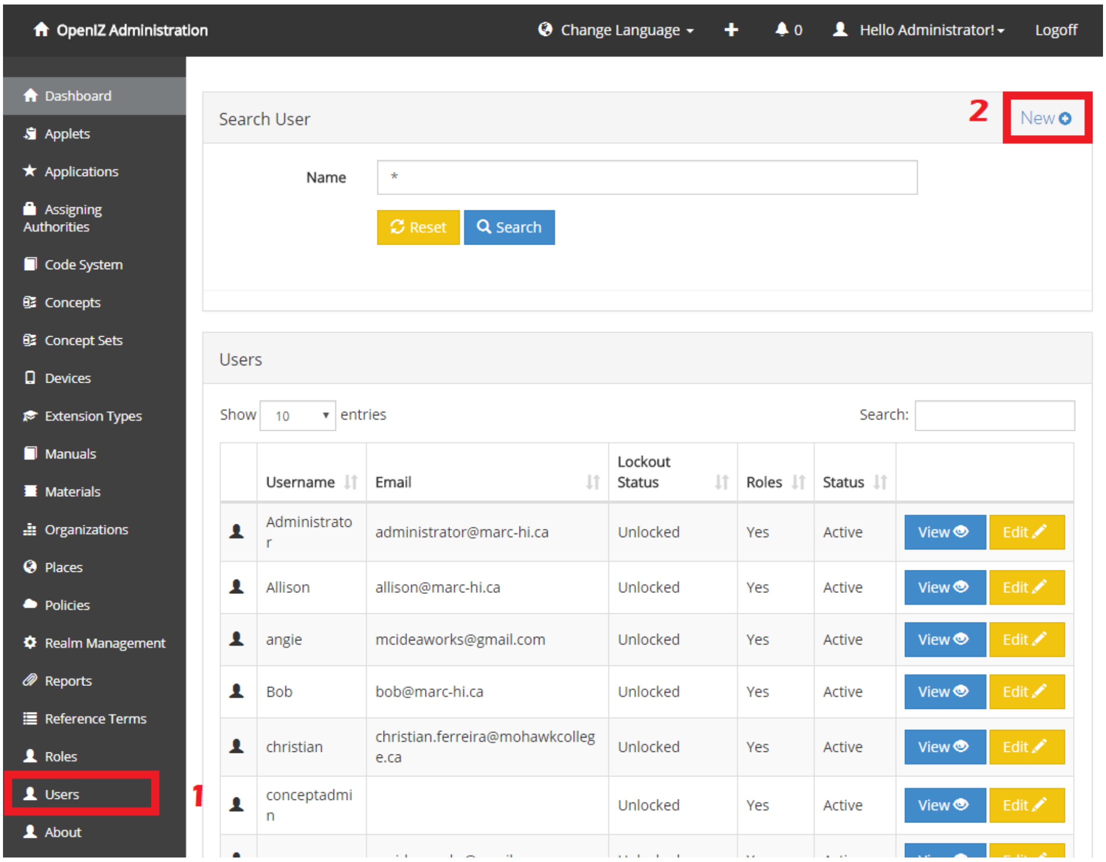


Figure 3.8 – New User

Step 8: Fill out all of the details for the user (Example details can be seen in the figure for **Step 9** below)

- In this example we are using the *Username: reportsadmin*

  Note: Ensure you are using the **ReportAdmin** role for the **Roles** dropdown. (Click on the empty whitespace in the **Roles** field and either start typing **ReportAdmin**, or find it in the list) (See the figure below)

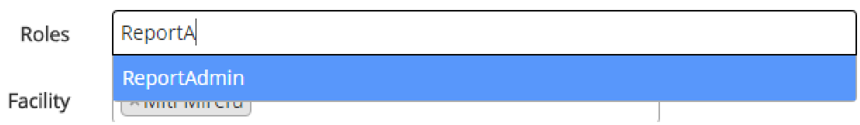


Figure 3.9 – Adding roles to the user

Step 9: Press the **Submit** button to create the user (See the figure below)

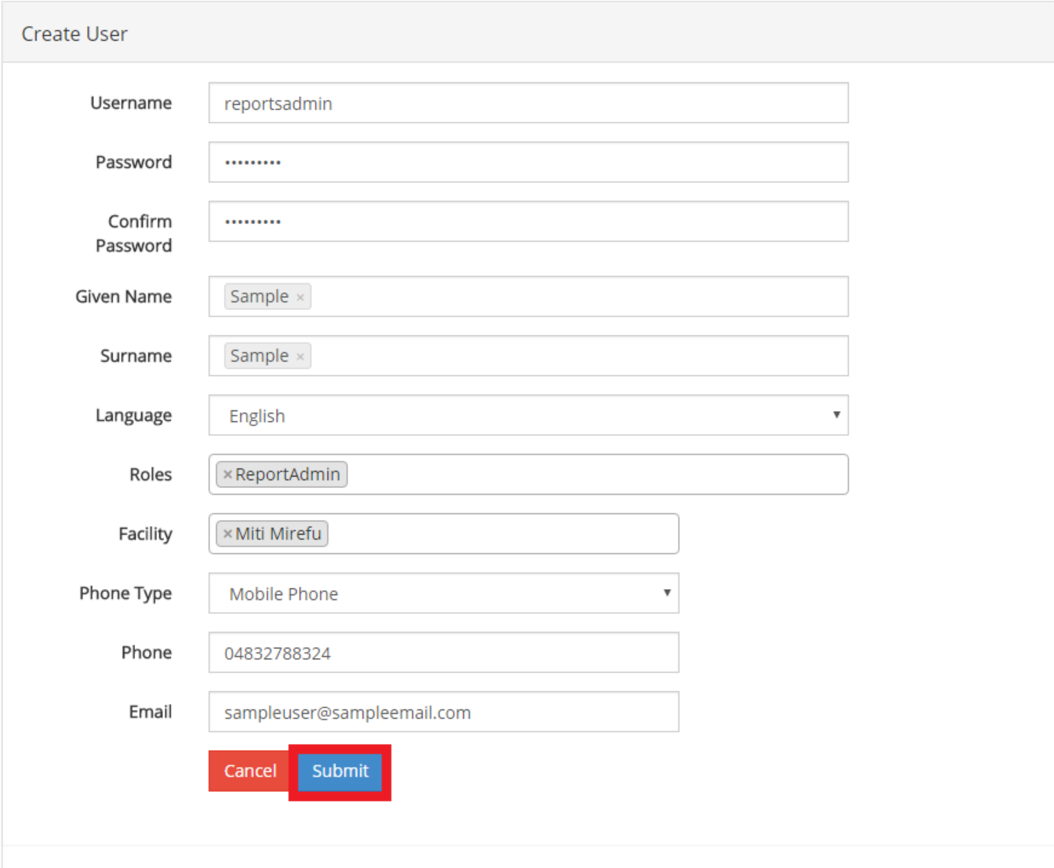


Figure 3.10 – Creating a new user

The new **reportsadmin** user will be created and have the **ReportAdmin** role to give them specific access to **Reports** on **OpenIZ**. Let’s test it out.

Step 10: Log off of **OpenIZ** by pressing the **Logoff** button on the top right corner of the page (See the figure below)

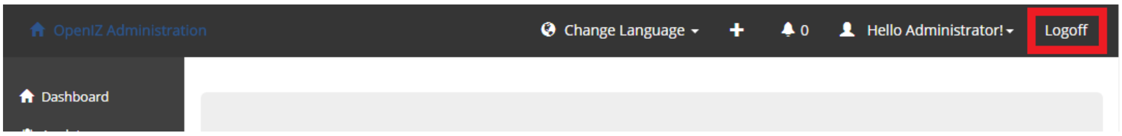


Figure 3.11 – Logging off

Step 11: Log back into **OpenIZ** using the new user account, press the **Log in** button (See the figure below)

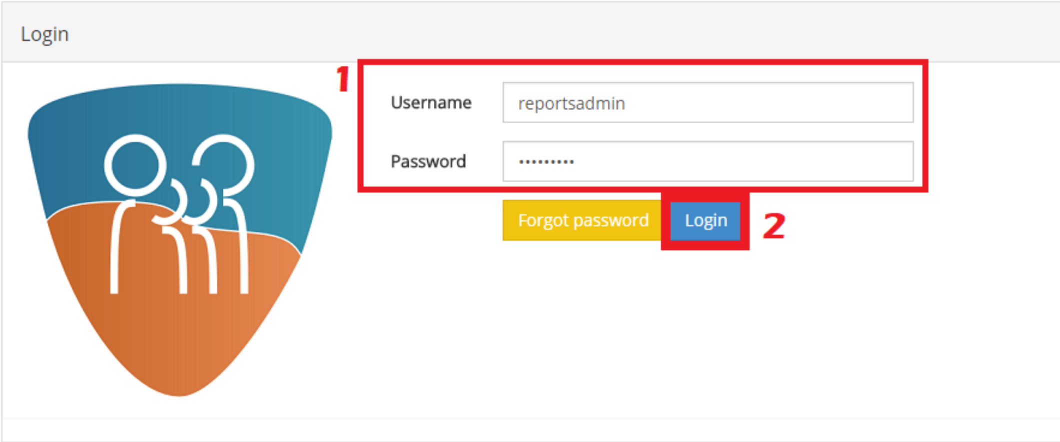


Figure 3.12 – Logging in

You will be logged into the new **reportsadmin** account. As you may see, on the left side tool bar there are only a few options now. The **Dashboard** and **About** page are default for any role that can **Login**, and the **Reports** page is available to those who have **Unrestricted Data Warehouse** access. (See the figure below)

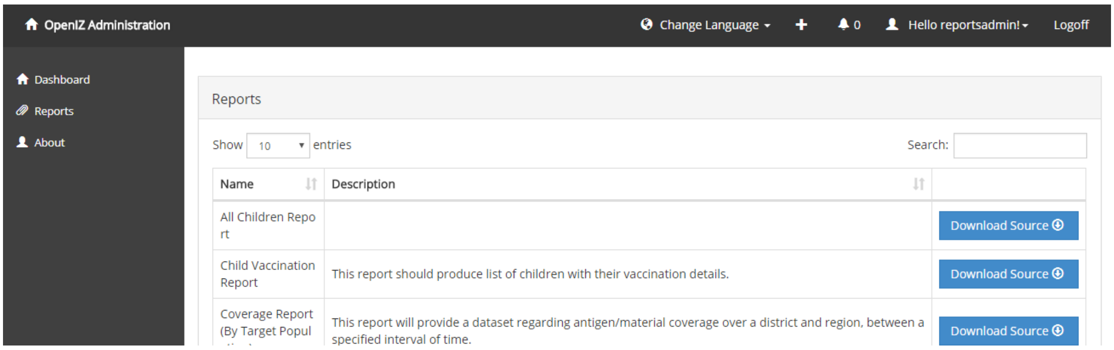


Figure 3.13 – Reports page

Chapter 4: The Dashboard

The **Dashboard** is the main hub for seeing what's going on with the TImR system. There is a quick view of a few sections available on the administration portal such as applets installed, certificate requests, devices registered and available roles.

The Dashboard is the first view you see when you first log in. You can press the **Dashboard** button from another page to access it. (See the figure below)

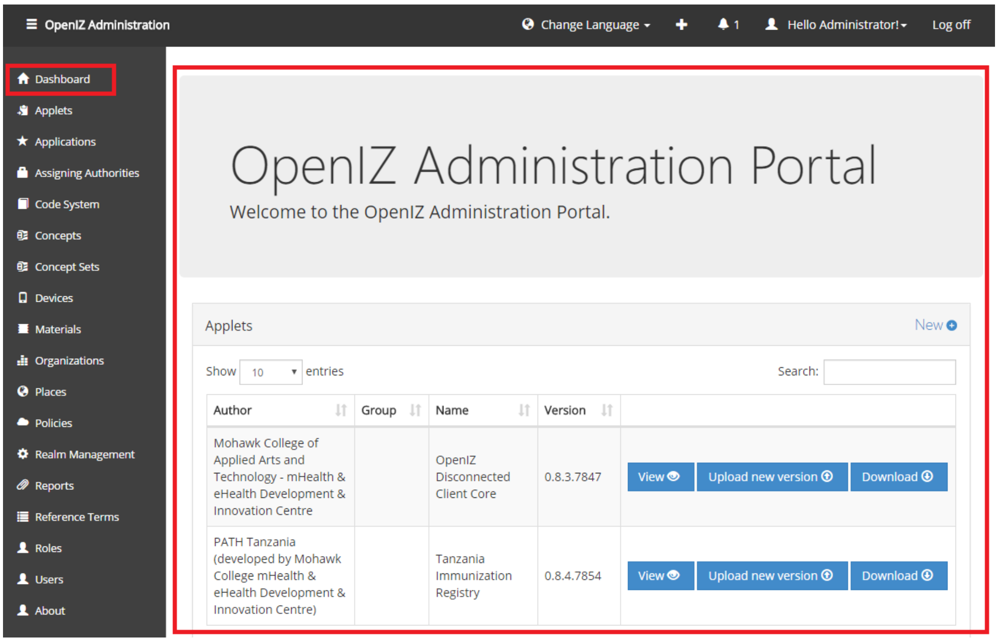


Figure 4.1 - The Dashboard and Dashboard button

4.1 Applets

The **Applets** area shows a list the current applets installed on the system. There are also options to manage these applets or add a new applet. (See the figure below)

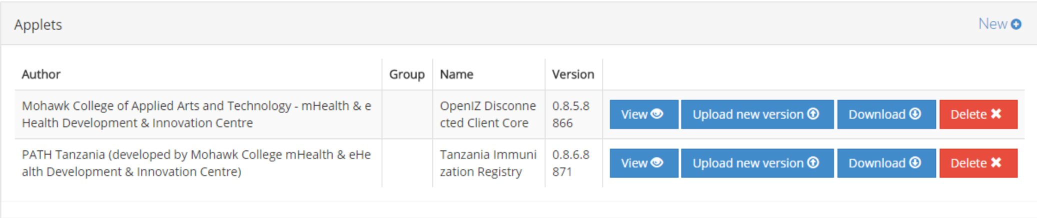


Figure 4.2 - Applets area

For more detailed information about **Applets** see the **Applets** section below.

4.2 Certificate Requests

The **Certificate Requests** area shows a list of all the certificate signing requests that have been submitted. You can view the list, and approve or deny the certificates. (See the figure below)

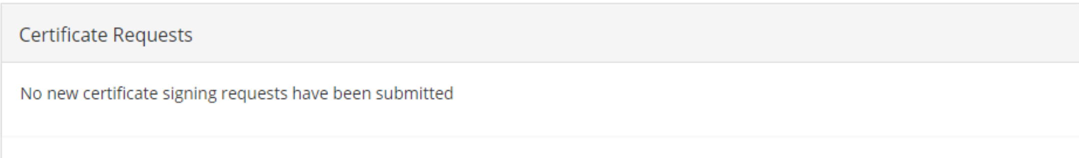
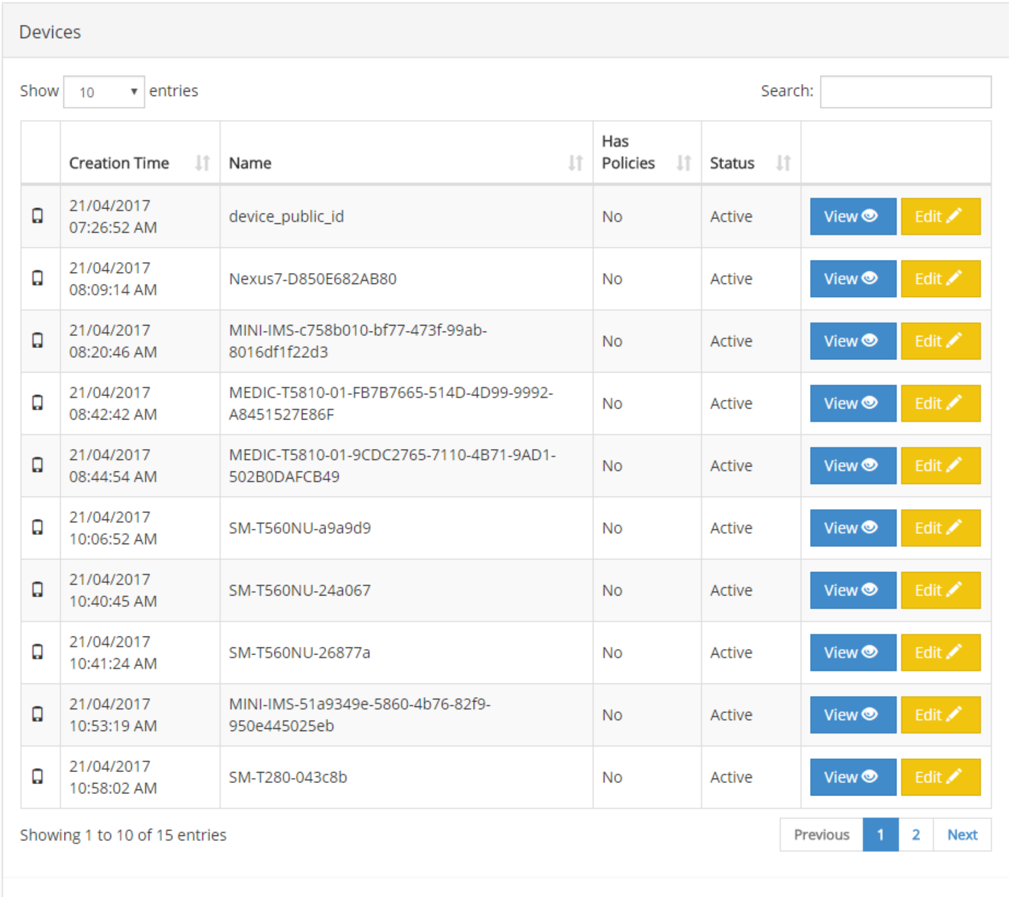


Figure 4.3 - Certificate Requests area

For more detailed information about **Certificate Requests** see the **Certificates** section below.

4.3 Devices

The **Devices** area provides you with a search feature to search for any devices registered on the system. You can also add new devices or manage devices currently registered. (See the figure below)


Devices

Show 10 entries Search:

	Creation Time	Name	Has Policies	Status	
	21/04/2017 07:26:52 AM	device_public_id	No	Active	View Edit
	21/04/2017 08:09:14 AM	Nexus7-D850E682AB80	No	Active	View Edit
	21/04/2017 08:20:46 AM	MINI-IMS-c758b010-bf77-473f-99ab-8016df1f22d3	No	Active	View Edit
	21/04/2017 08:42:42 AM	MEDIC-T5810-01-FB7B7665-514D-4D99-9992-A8451527E86F	No	Active	View Edit
	21/04/2017 08:44:54 AM	MEDIC-T5810-01-9CDC2765-7110-4B71-9AD1-502B0DAFCB49	No	Active	View Edit
	21/04/2017 10:06:52 AM	SM-T560NU-a9a9d9	No	Active	View Edit
	21/04/2017 10:40:45 AM	SM-T560NU-24a067	No	Active	View Edit
	21/04/2017 10:41:24 AM	SM-T560NU-26877a	No	Active	View Edit
	21/04/2017 10:53:19 AM	MINI-IMS-51a9349e-5860-4b76-82f9-950e445025eb	No	Active	View Edit
	21/04/2017 10:58:02 AM	SM-T280-043c8b	No	Active	View Edit

Showing 1 to 10 of 15 entries Previous 1 2 Next

Figure 4.4 - Devices area

For more detailed information about **Devices** see the **Devices** section below.

4.4 Roles

The **Roles** area provides you with a search feature to search for any roles currently implemented in the system. You can also add new roles or manage the roles that are already implemented. (See the figure below)

Roles

Show 10 entries Search:

	Name	Description	Has Policies	Status	
	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View Edit
	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View Edit
	DEVICE	Represents a device in the system. Identifies the functions that are used for devices. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	IT Officer		No	Active	View Edit
	Middle Level Officer		No	Active	View Edit
	National Level Officer		No	Active	View Edit

Figure 4.5 - Roles area

For more detailed information about **Roles** see the **Roles** section below.

Chapter 5: Applets

The **Applets** page displays a list the current applets installed on the system and shows the author, group, name, and version information. (See the figure below)

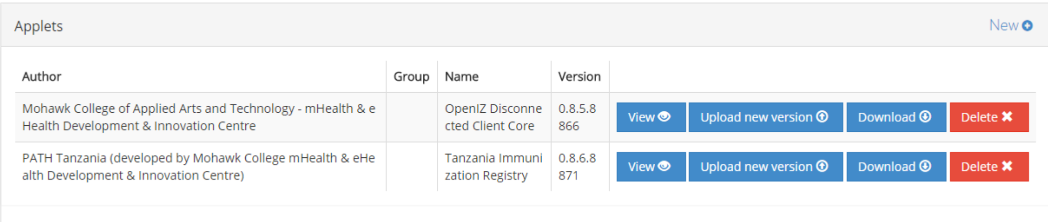


Figure 5.1 - Applets page

You can add new applets or view, update and download currently installed applets.

5.1 New Applets

From here you can upload new applets to distribute them to the TImR system.

To add a new applet:

Step 1: Click the **New** button in the top right of the **Applets** area (See the figure below)

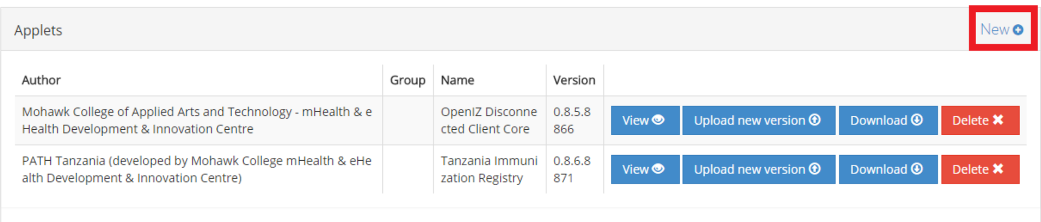


Figure 5.2 - Creating a new applet

Step 2: You will be brought to the **Upload Applet** page, Click the **Choose File** button (See the figure below)

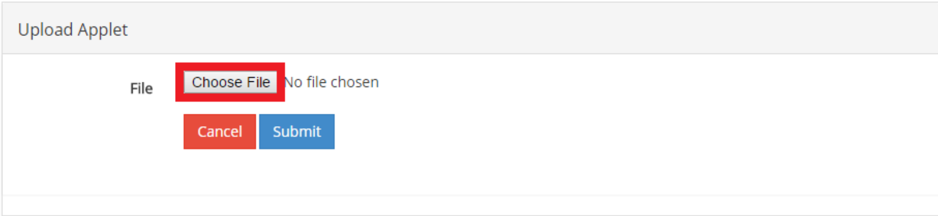


Figure 5.3 - Uploading a new applet

Step 3: In the File Explorer pop-up box, browse to the applet file you wish to add. Select the applet file and click the **Open** button (See the figure below)

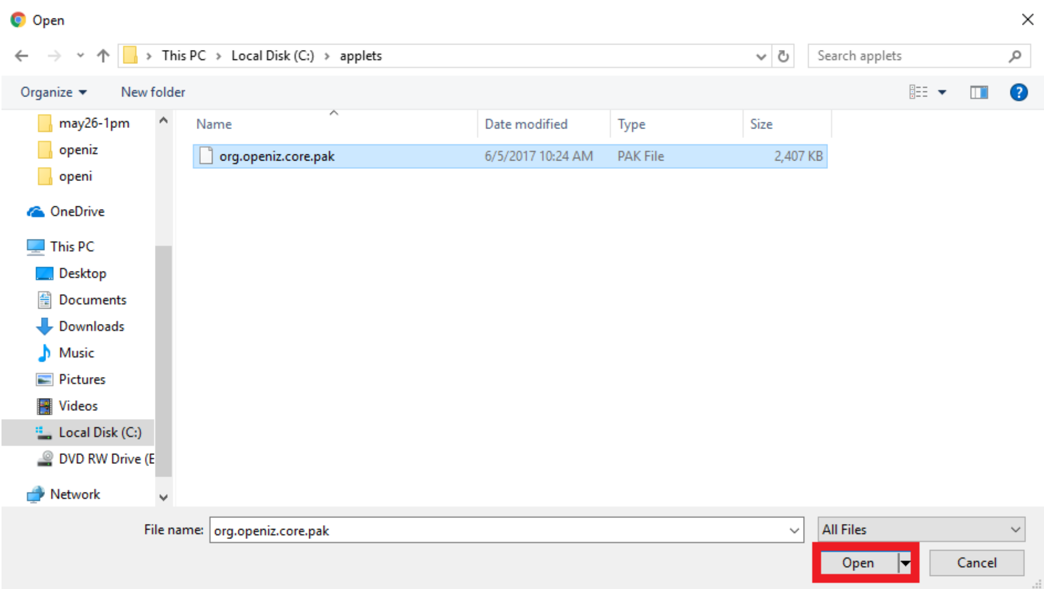
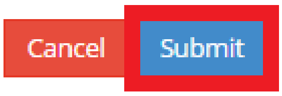


Figure 5.4 – Browsing for the applet file

Step 4: Click the **Submit** button to upload the applet (See the figure below)



5.2 View Applets

You are able to view details about the applets that are currently installed. To view applet details:

Step 1: From the **Applets** page, click the **View** button next to the applet you wish to view (See the figure below)

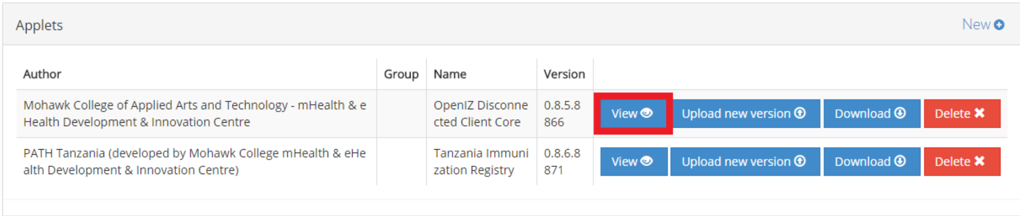


Figure 5.5 - View an applet button

You will be brought to the **View Applet** page. You can see basic information, version information as well as any assets for the applet. (See the figure below)

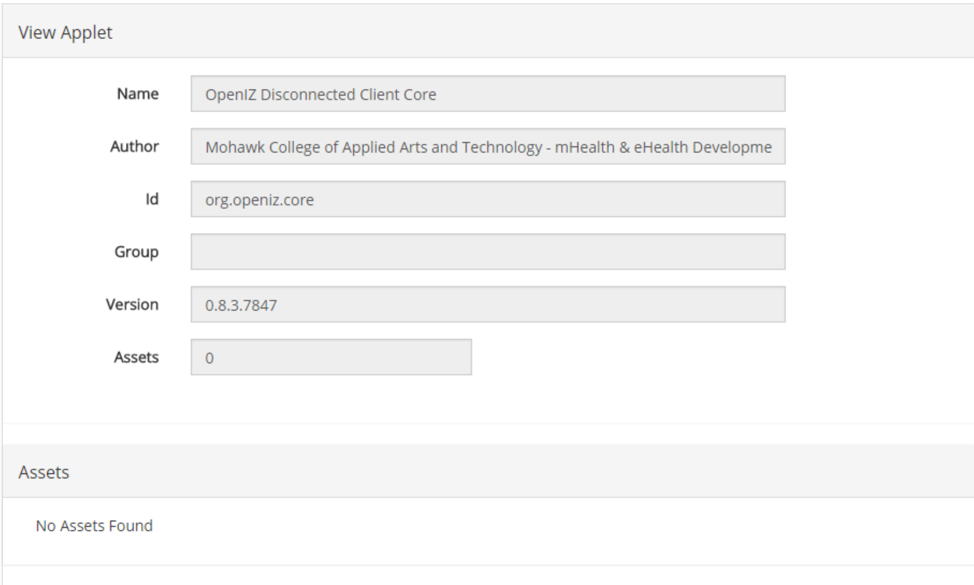


Figure 5.6 - Viewing an applet

5.3 Upload New Applet Version

If you want to upload a newer version to a currently installed applet without adding a new applet:

Step 1: From the **Applets** page, click the **Upload new version** button next to the applet you wish to update (See the figure below)

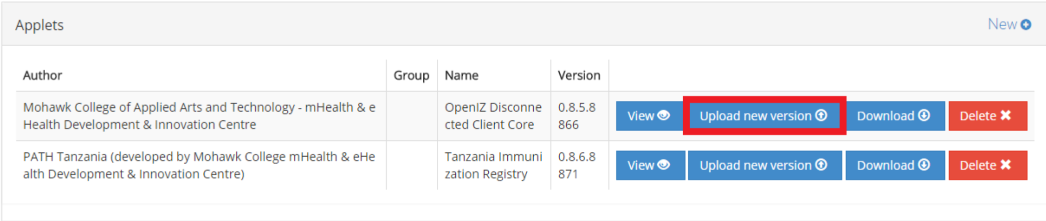


Figure 5.7 - Upload a new applet version

You will be brought to the **Upload & View Applet** page. Here you can see what the currently installed applet is and decide to update it or not.

Step 2: Click the **Choose File** button (See the figure below)

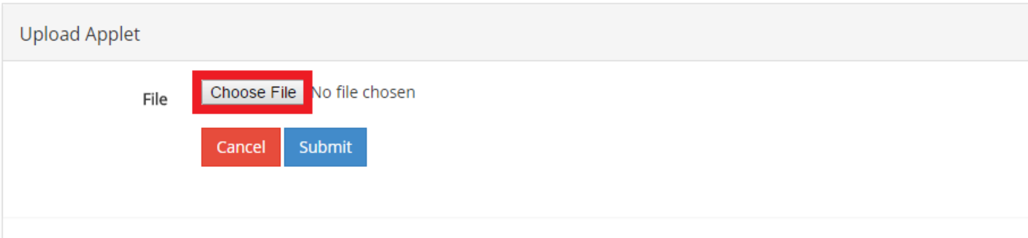


Figure 5.8 - Uploading a new applet version

Step 3: In the File Explorer pop-up box, browse to the applet file you wish to add. Select the applet file and click the **Open** button (See the figure below)

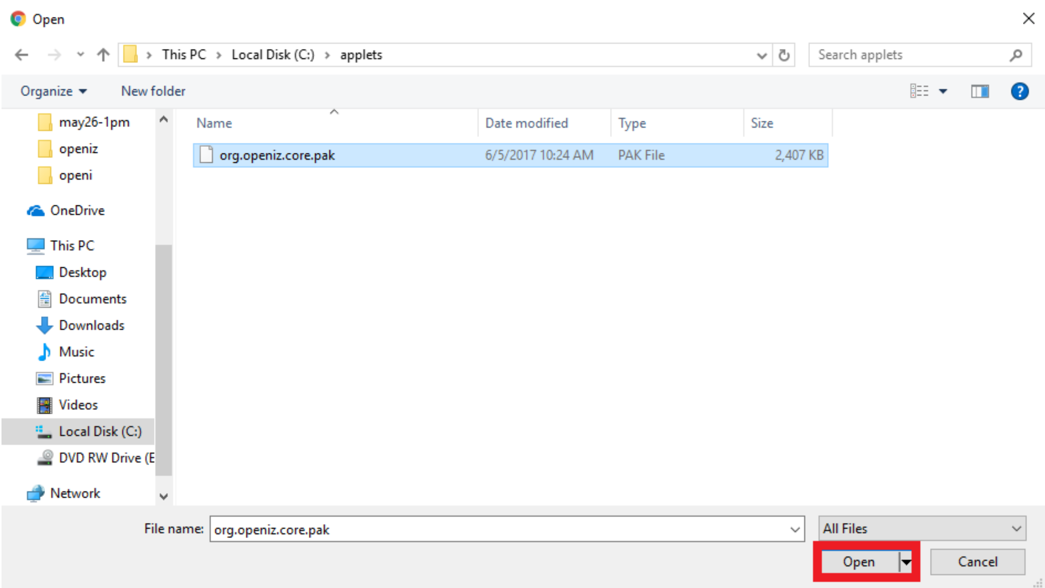
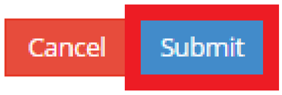


Figure 5.9 – Browsing for the applet file

Step 4: Click the **Submit** button to upload the applet (See the figure below)



5.4 Downloading Applets ⊕

You can download a local copy of the currently installed applets:

Step 1: From the **Applets** page, click the **Download** ⊕ button next to the applet you wish to download (See the figure below)

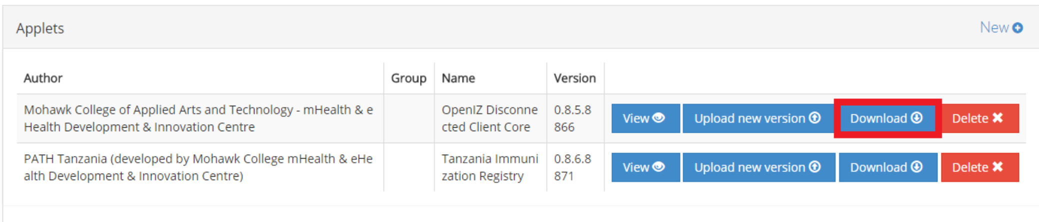


Figure 5.10 - Downloading applets – Download button

The applet will be automatically downloaded to your local machine. Unless otherwise specified, the file will likely be in your Downloads folder.

5.5 Deleting Applets ✖

You can delete a submitted applet to remove it from TImR. To delete an applet:

Step 1: Click the **Delete** ✖ button next to the applet you wish to delete (See the figure below)

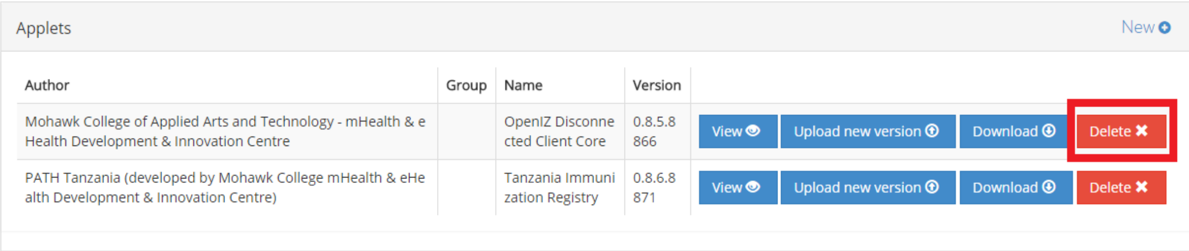


Figure 5.11 – Deleting an applet

You will see a success message displayed stating *Applet deleted successfully*. The applet will be removed from the TImR system.

Chapter 6: Applications ★

The **Applications** page allows you to search for applications, or manually manage applications and their relationships (policies). (See the figure below)

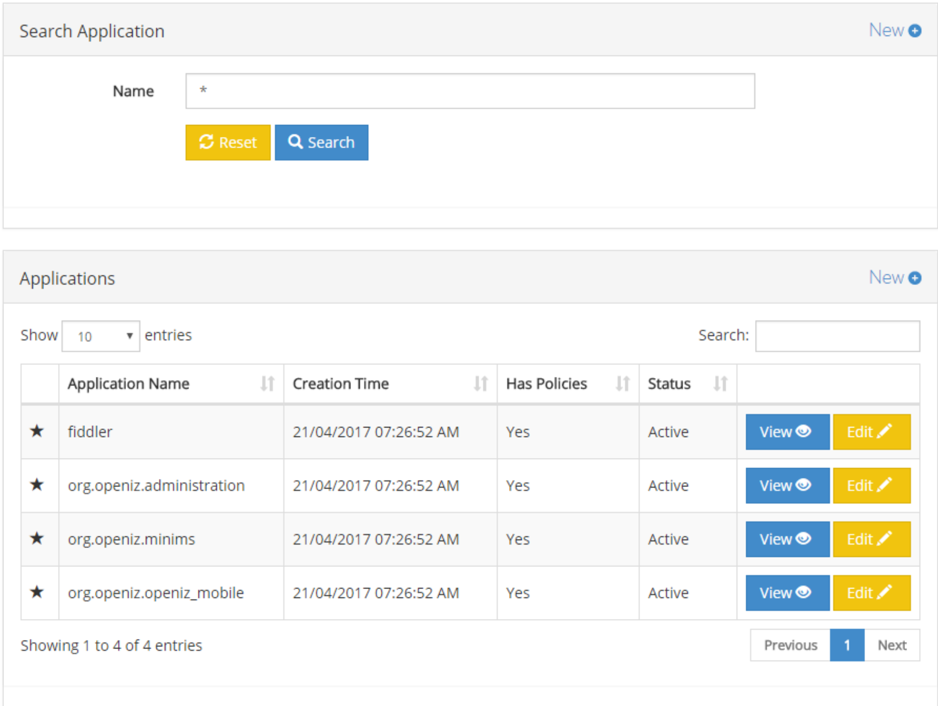


Figure 6.1 - Applications page

6.1 Search Applications 🔍

If you are looking for a specific application that already exists in the system you can use the **Search Application** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Application** area, enter the name of an application you are looking for and click the **Search** 🔍 button (See the figure below)

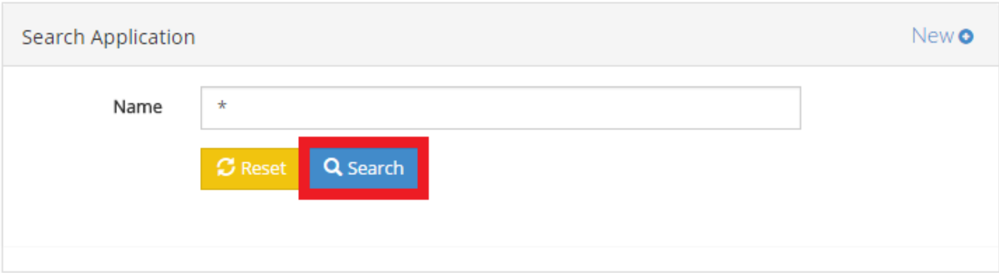


Figure 6.2 - Searching for an Application

Search results will appear in the **Applications** area below. See the following section on **Applications** ★ for more information.

6.2 Applications ★

The **Applications** area of the **Applications** page displays a list of all the applications in the search results. By default the search results load with all applications available. (See the figure below)

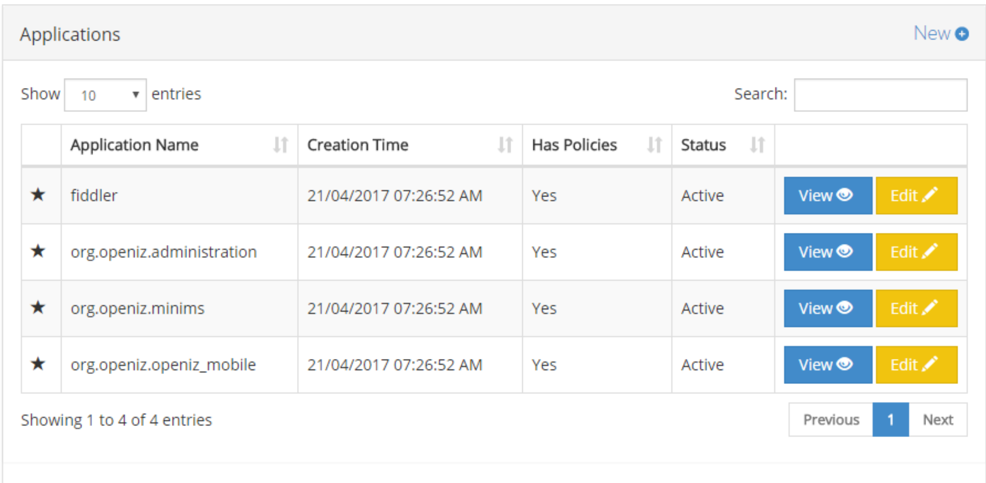


Figure 6.3 - Applications

Applications displayed here show the applications name, creation time, policy status and active status. Applications can be viewed and managed from this page.

New applications can also be added from this page. To add a new application, or view and manage an existing application, see sections below.

6.3 New Application ⊕

When a new application is required, you can create a new application with specific policies limiting the power it may have within the system. To create a new application:

Step 1: From the **Applications** page, click the **New** ⊕ button in the top right of the **Search Application** area (See the figure below)

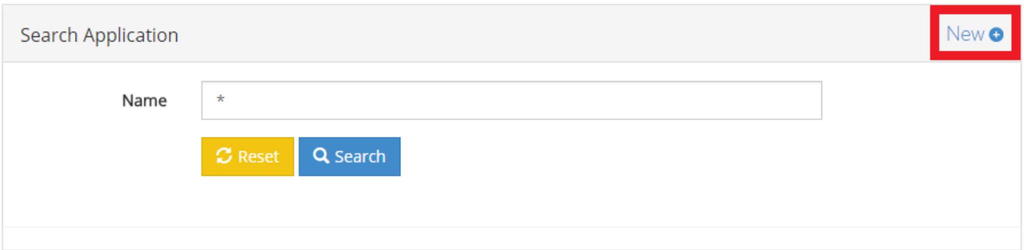


Figure 6.4 - New application button

Step 2: Fill in the fields for the application you are adding (See the figure below):

- Name (Required)
- Application Secret

  Note: This field will be prefilled with a unique ID

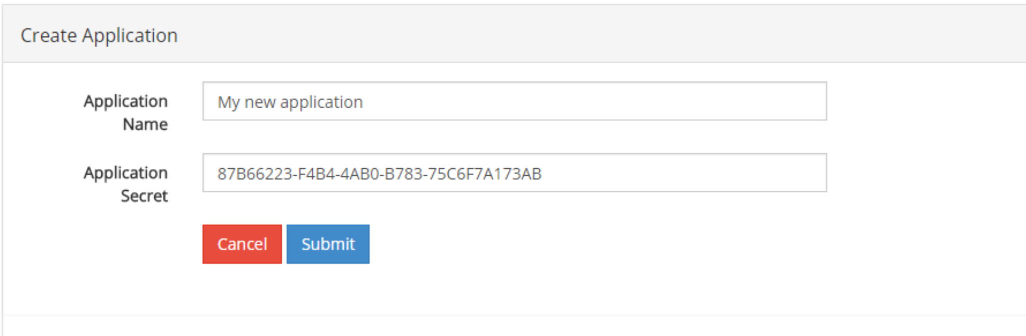
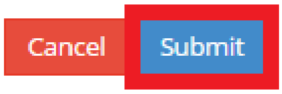


Figure 6.5 - Create Application page

Step 3: Press the **Submit** button to create the application (See the figure below)



If created successfully you should see a popup display message saying the *Application created successfully*. From here you will see the **View Application** page. See below for more details on viewing and editing applications.

6.4 View Application ★

After finding an application in the search results, or creating a new application you can view the applications details.

Step 1: From the **Applications** page, find an application you would like to view and press the **View** 👁 button

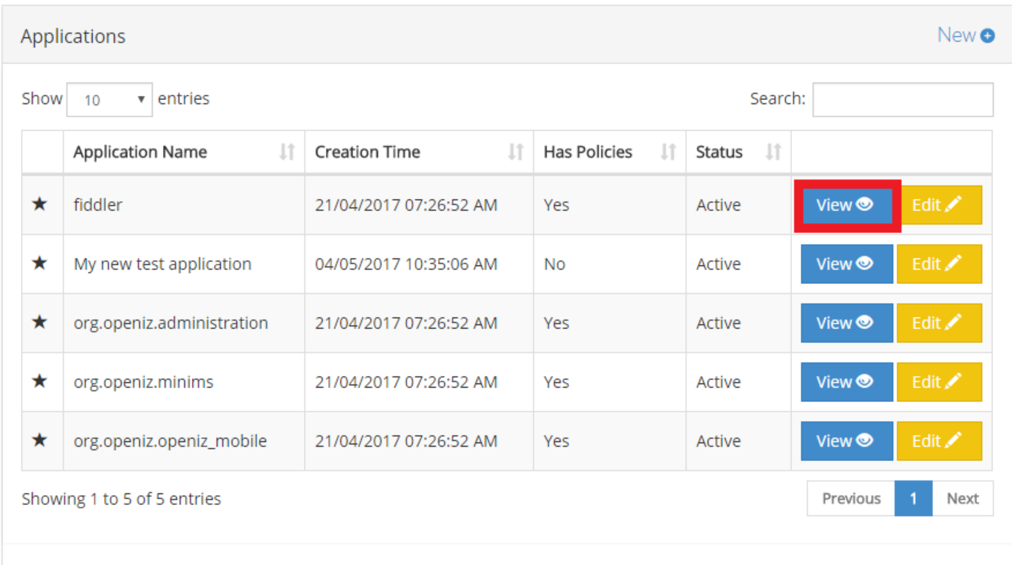


Figure 6.6 - View Application button

You will be brought to **View Application** page for the application you selected to view.

6.4.1 View Application Area

The **View Application** area displays the initial information for the application that was created. The name and description for the application are displayed in this area.

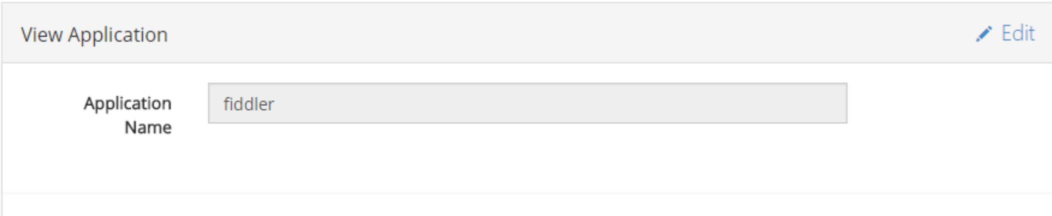
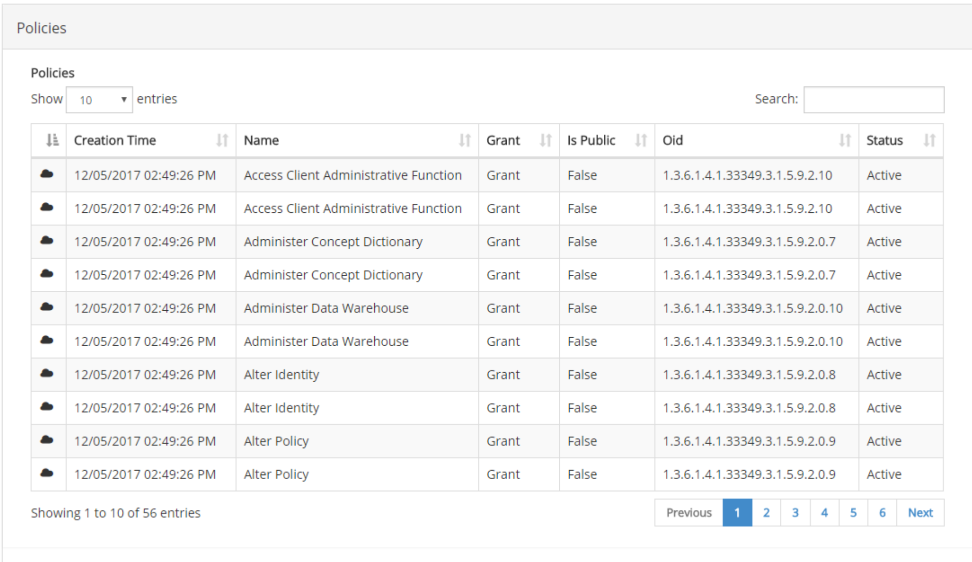


Figure 6.7 - View Application area

6.4.2 Policies Area

The **Policies** area displays a list of **Policies** related to the application. The creation time, name, grant status, public status, oid (object identifier) and active status are all displayed for each policy listed.



	Creation Time	Name	Grant	Is Public	Oid	Status
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Active
	12/05/2017 02:49:26 PM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7	Active
	12/05/2017 02:49:26 PM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Active
	12/05/2017 02:49:26 PM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10	Active
	12/05/2017 02:49:26 PM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8	Active
	12/05/2017 02:49:26 PM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8	Active
	12/05/2017 02:49:26 PM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9	Active
	12/05/2017 02:49:26 PM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9	Active

Figure 6.8 - Application Policies area

6.5 Edit Application ★

Each application has several components that can be edited. You can change the initial details, change policies and view current policies

To access the **Edit Application** page from the **Application** page:

Step 1: Find an application using the search bar and click the **Edit** button

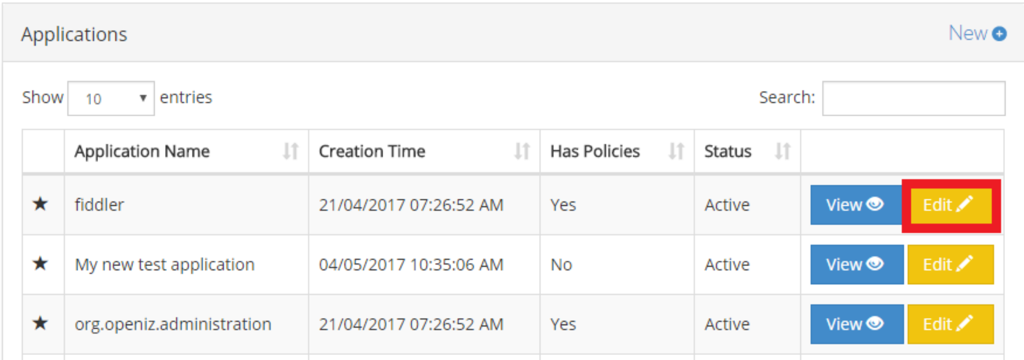


Figure 6.9 - Edit Application from the Applications page

To access the **Edit Application** page from the **View Application** page:

Step 1: Click the **Edit** button

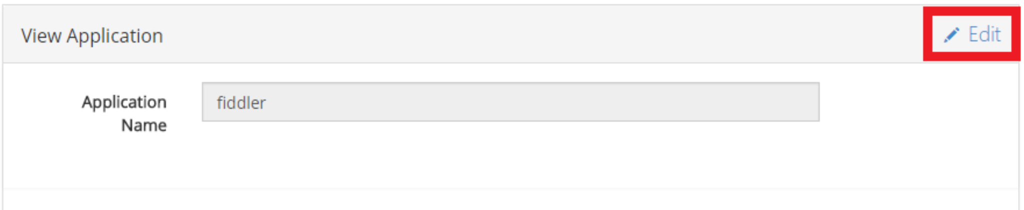


Figure 6.10 - Edit Application from the View Application page

You will be brought to **Edit Application** page for the application you selected to edit. From this page you can modify fields and add or remove policies.

6.5.1 Edit Application Area

In this area you can change all the basic values set for the application you are viewing. *Required fields: Application Name, Policies.*

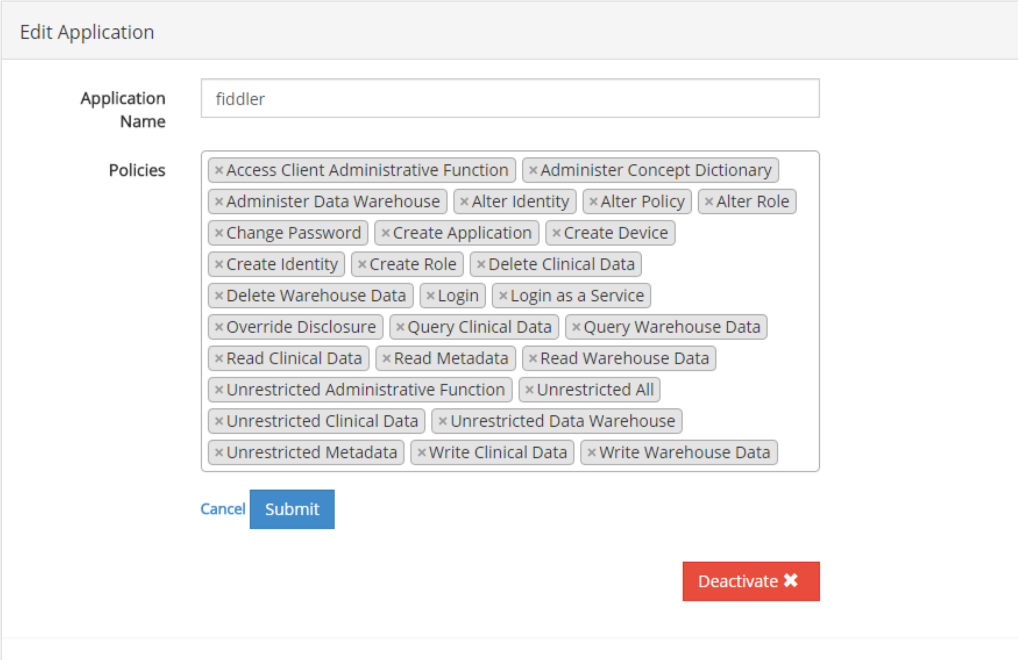


Figure 6.11 - Edit Application area

If the application being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Application Is Not Active*. To activate or deactivate an application, see the sections below.

Deactivating an Application ✖

In this area you can deactivate the application. Once deactivated, the application cannot be modified or used anywhere in the system until reactivated. To deactivate an application:

Step 1: From the **Edit Application** page, click the red **Deactivate ✖** button in the **Edit Application** area

You will see a message popup stating *Application successfully deactivated* and you will be returned to the **Search & View Applications** page.

Activating an Application ⓘ

If an application has been deactivated it can be reactivated in the **Edit Application** page. Once activated, the application can again be modified or used in the system until deactivated. To activate an application:

Step 1: From the **Edit Application** page, click the green **Activate** ⓘ button in the **Edit Application** area

You will see a message popup stating *Application successfully activated* and you will be returned to the **Search & View Applications** page.

Adding Policies

You are able to modify available policies in the **Edit Application** area of the **Edit Application** page. You can add multiple policies to an application to give that application more functionality throughout the system. To add a policy to an application:

Step 1: Click on an empty part of the **Policies** field

Figure 6.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy

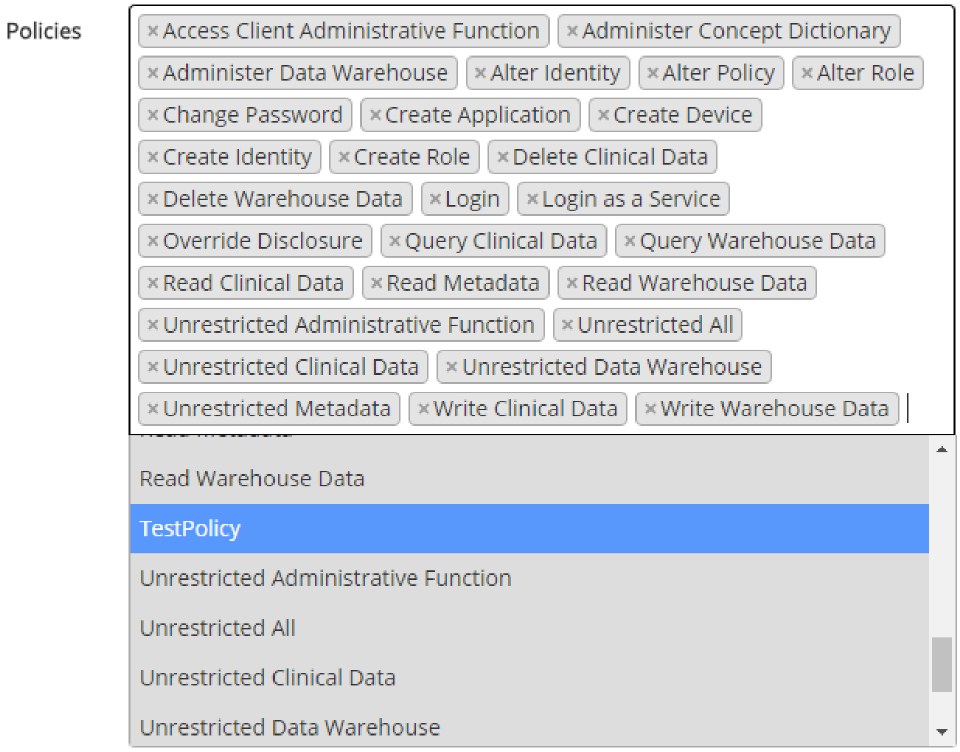
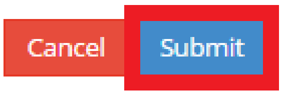


Figure 6.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button



You will be returned to the **View Application** page. The **Policies** area will be updated with the changes in policies for that application.

Removing Policies

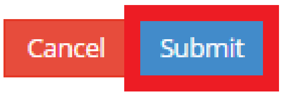
You are able to modify available policies in the **Edit Application** area of the **Edit Application** page. You can restrict access for specific applications by removing some policies that exist for that application. To remove a policy from an application:

Step 1: Click on the ✖ next to the name of a policy in the **Policies** field that you want to remove

Figure 6.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

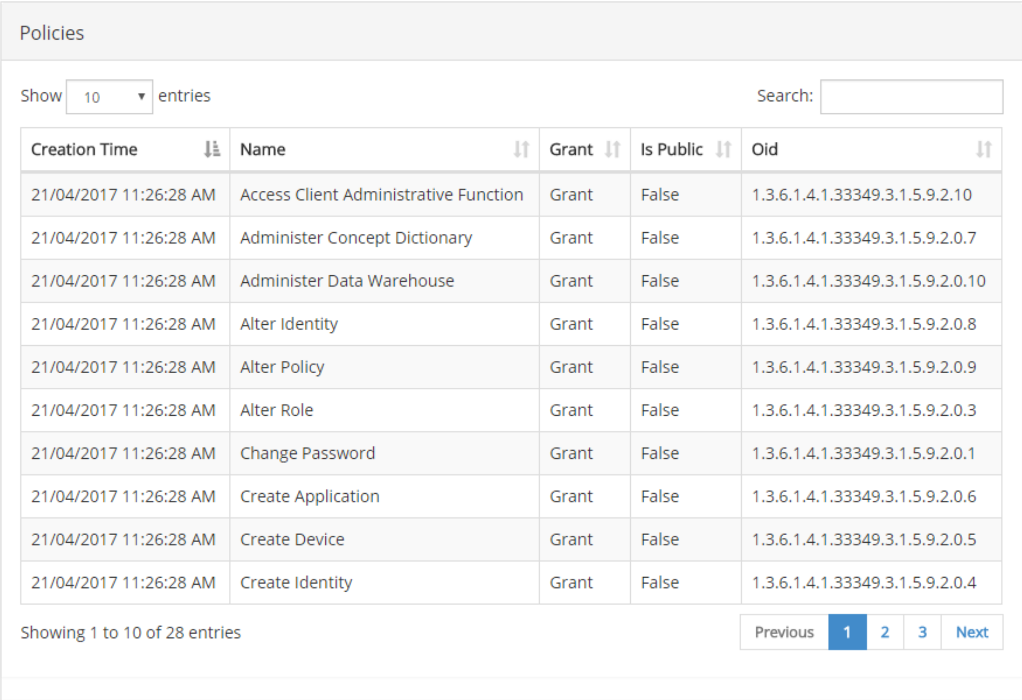
Step 3: Once you have modified the policies, press the **Submit** button



You will be returned to the **View Application** page The **Policies** area will be updated with the changes in policies for that application.

6.5.2 Policies Area

The **Policies** area displays a list of **Policies** related to the application you are editing. The applications creation time, name, grant status, public status, oid (object identifier) and active status are all visible for each policy listed. If there policy list is very large there is a search bar that allows you to filter results.



Policies

Show 10 entries Search:

Creation Time	Name	Grant	Is Public	Oid
21/04/2017 11:26:28 AM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10
21/04/2017 11:26:28 AM	Administer Concept Dictionary	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.7
21/04/2017 11:26:28 AM	Administer Data Warehouse	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.10
21/04/2017 11:26:28 AM	Alter Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.8
21/04/2017 11:26:28 AM	Alter Policy	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.9
21/04/2017 11:26:28 AM	Alter Role	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.3
21/04/2017 11:26:28 AM	Change Password	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.1
21/04/2017 11:26:28 AM	Create Application	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.6
21/04/2017 11:26:28 AM	Create Device	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.5
21/04/2017 11:26:28 AM	Create Identity	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0.4

Showing 1 to 10 of 28 entries

Previous 1 2 3 Next

Figure 6.15 – Policies area

Chapter 7: Assigning Authorities

The **Assigning Authorities** page allows you to search for assigning authorities, and view or manage them. (See the figure below)

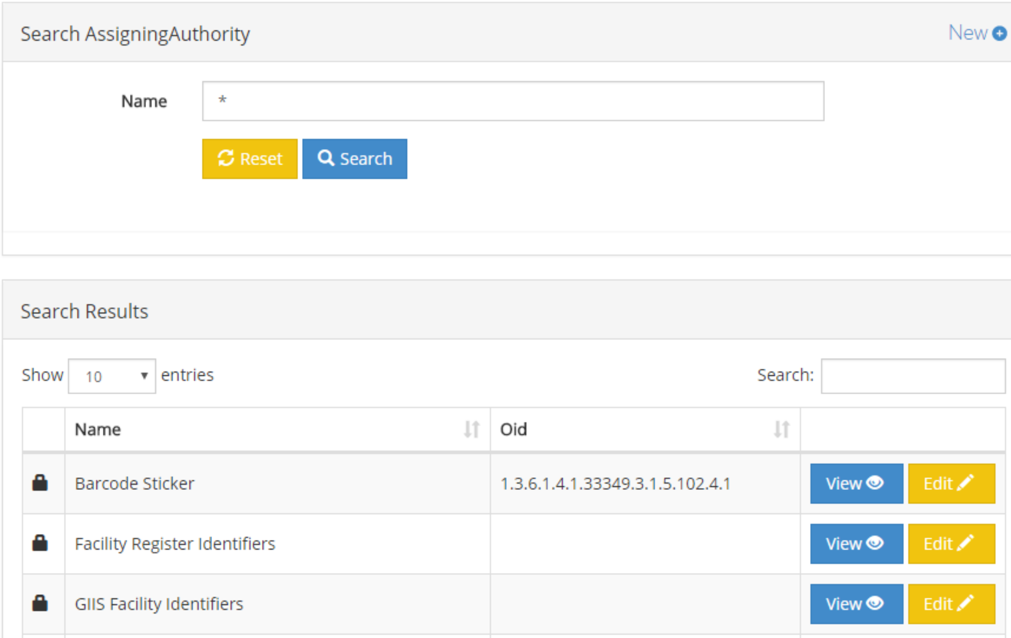


Figure 7.1 - Assigning Authorities page

7.1 Search Assigning Authorities

If you are looking for a specific assigning authority that already exists in the system you can use the **Search Assigning Authority** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Assigning Authority** area, enter the name of an assigning authority you are looking for and click the **Search** button (See the figure below)

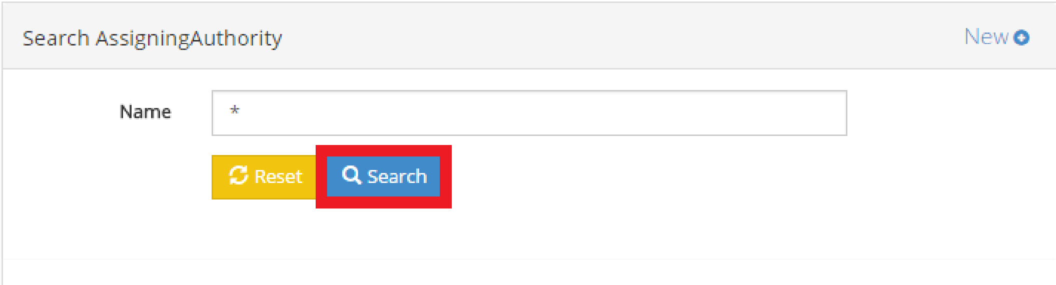


Figure 7.2 - Searching for an Assigning Authority

Search results will appear in the **Assigning Authorities** area below. See the following section on **Assigning Authorities** for more information.

7.2 Assigning Authorities

The **Assigning Authorities** area of the **Assigning Authorities** page displays a list of all the assigning authorities in the search results. By default the search results load with all assigning authorities available. (See the figure below)

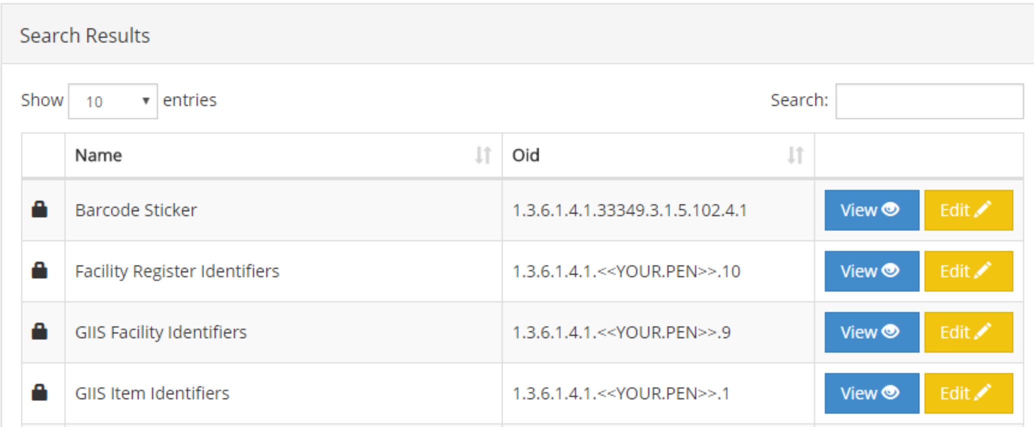


Figure 7.3 - Assigning Authorities

Assigning authorities displayed here list details such as the name, creation time, policy status and active status. Assigning authorities can be viewed and managed from this page.

New assigning authorities can also be added from this page. To add a new assigning authority, or view and manage an existing assigning authority, see sections below.

7.3 New Assigning Authority ⊕

When a new assigning authority is required, you can create a new assigning authority. To create a new assigning authority:

Step 1: From the **Assigning Authorities** page, click the **New** ⊕ button in the top right of the **Search Assigning Authority** area (See the figure below)

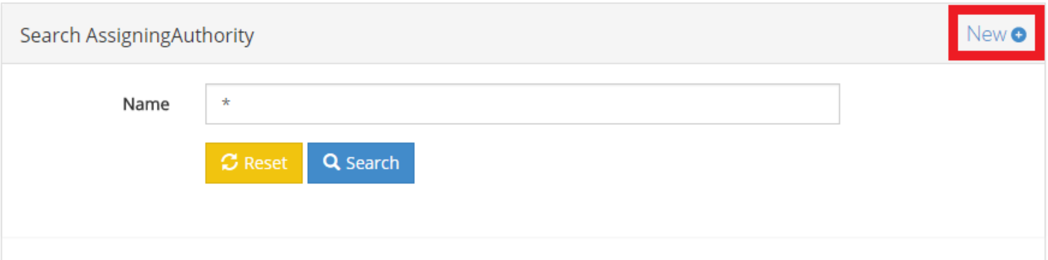


Figure 7.4 - New assigning authority button

Step 2: Fill in the fields for the assigning authority you are adding:

- Name (Required)
- Oid (Required)

  Note: This is the object identifier, this should be a unique value

- Url
- Domain Name (Required)
- Validation Regular Expression

  Note: This is a custom validation regular expression for the assigning authority

- Is Unique

Note: If an assigning authority is created and marked as unique, this cannot be changed in the future. Before submitting, please ensure that you truly would like this assigning authority to only contain unique values.

- Description

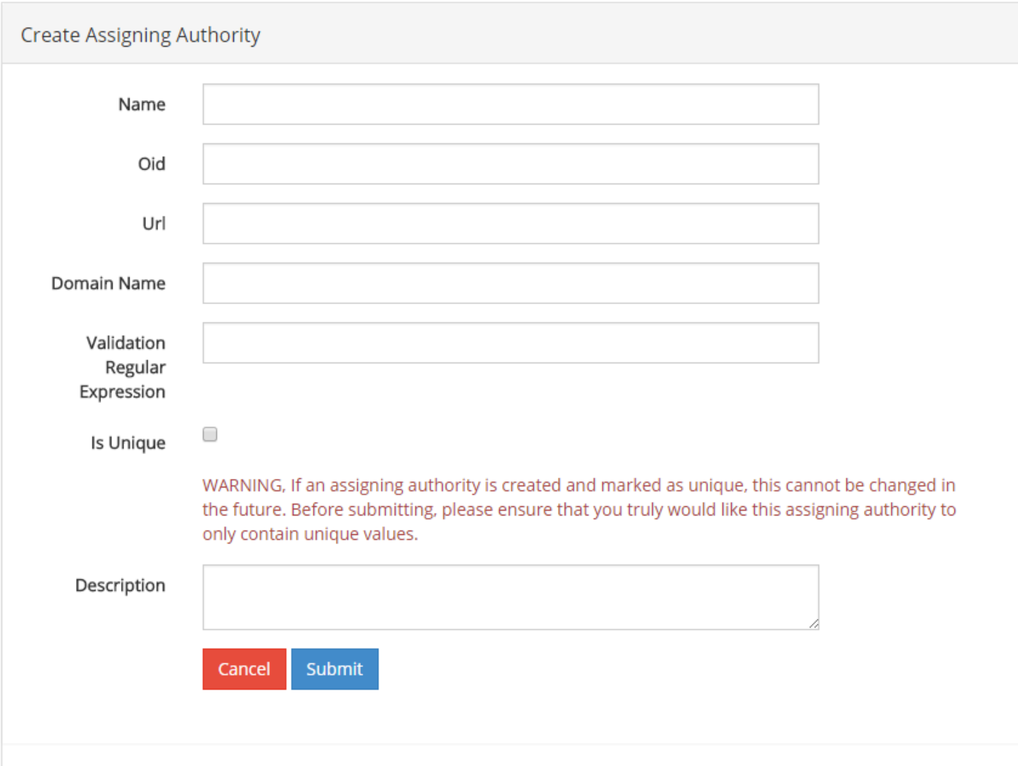
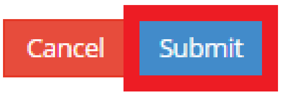


Figure 7.5 - Create Assigning Authority page

Step 3: Press the **Submit** button to create the assigning authority (See the figure below)



If created successfully you should see a popup display message saying the Assigning Authority created successfully. From here you will see the **View Assigning Authority** page. See below for more details on viewing and editing assigning authorities.

7.4 View Assigning Authorities

After finding an assigning authority in the search results, or creating a new assigning authority you can view the assigning authority's details.

Step 1: From the **Assigning Authorities** page, find an assigning authority you would like to view and press the **View** button (See the figure below)

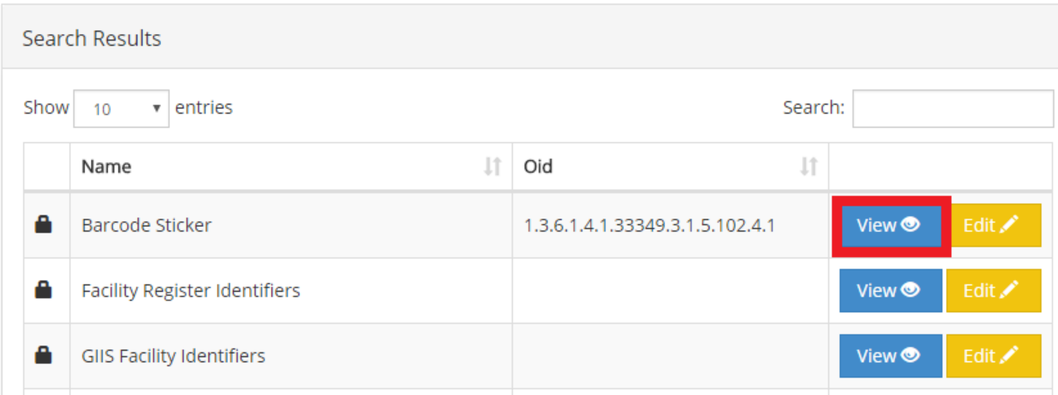


Figure 7.6 - View Assigning Authority button

You will be brought to **View Assigning Authority** page for the assigning authority you selected to view.

7.4.1 View Assigning Authority Area

The **View Assigning Authority** area displays the initial information for the assigning authority that was created. The name, oid (object identifier), URL, domain, validation regular expression and description for the assigning authority are displayed in this area. (See the figure below)

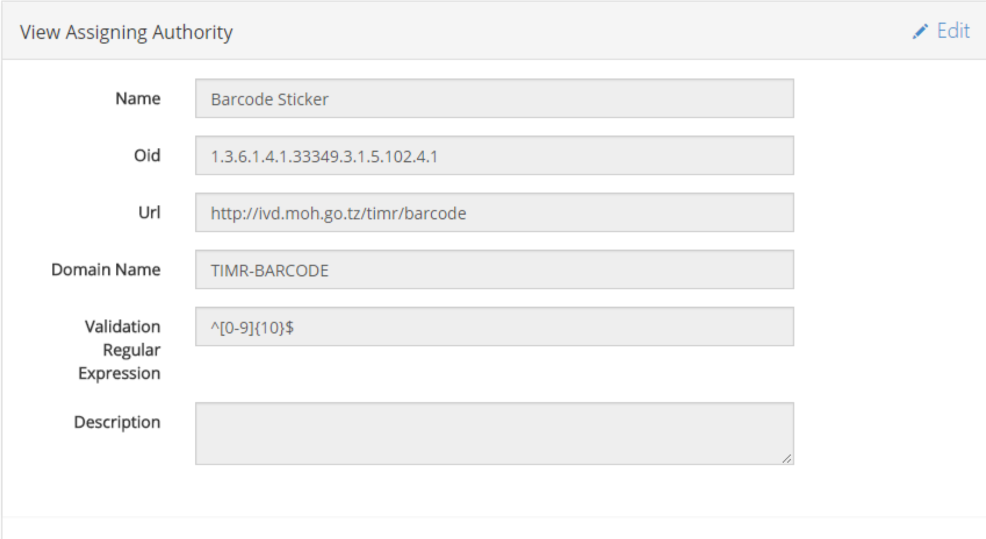


Figure 7.7 - View Assigning Authority area

7.4.2 Authority Scope Area

The **Authority Scope** area displays a list of all concepts for the assigning authority. (See the figure below)

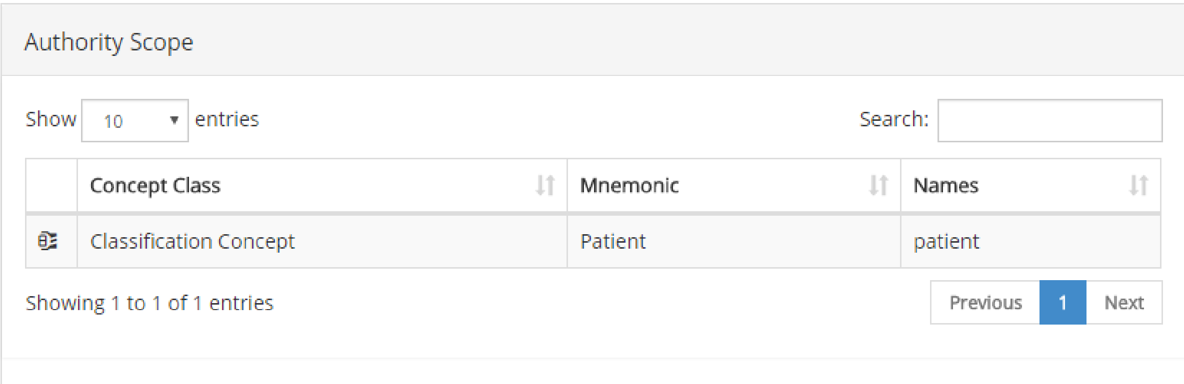


Figure 7.8 – Authority Scope area

7.5 Edit Assigning Authority

Each assigning authority has several components that can be edited.

To access the **Edit Assigning Authority** page from the **Assigning Authority** page:

Step 1: Find an assigning authority using the search bar and click the **Edit** button (See the figure below)

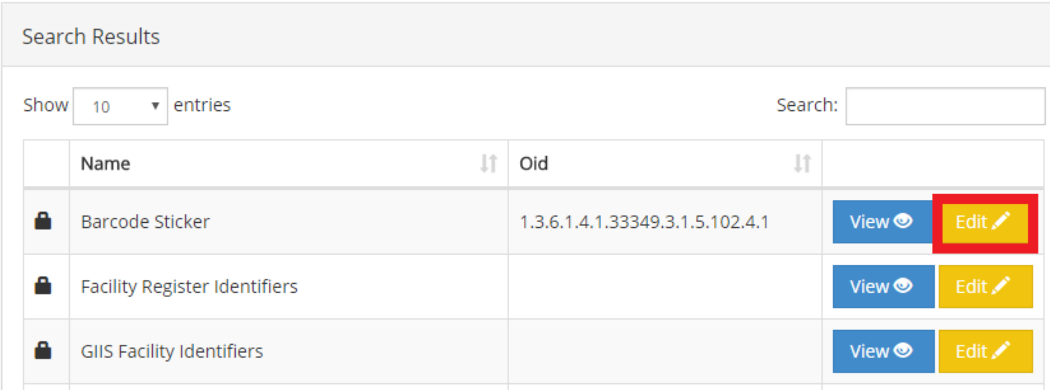


Figure 7.9 - Edit Assigning Authority from the Assigning Authorities page

To access the **Edit Assigning Authority** page from the **View Assigning Authority** page:

Step 1: Click the **Edit** button (See the figure below)

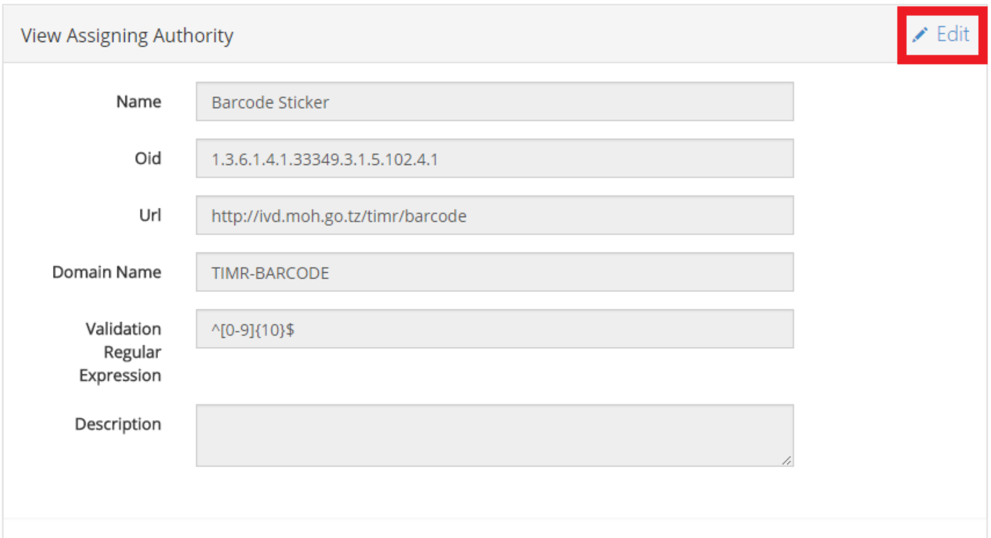


Figure 7.10 - Edit Assigning Authority from the View Assigning Authority page

You will be brought to **Edit Assigning Authority** page for the assigning authority you selected to edit. From this page you can modify fields.

7.5.1 Edit Assigning Authority Area

In this area you can change all the basic values set for the assigning authority you are viewing. *Required fields: Name, Oid, Domain Name.* (See the figure below)

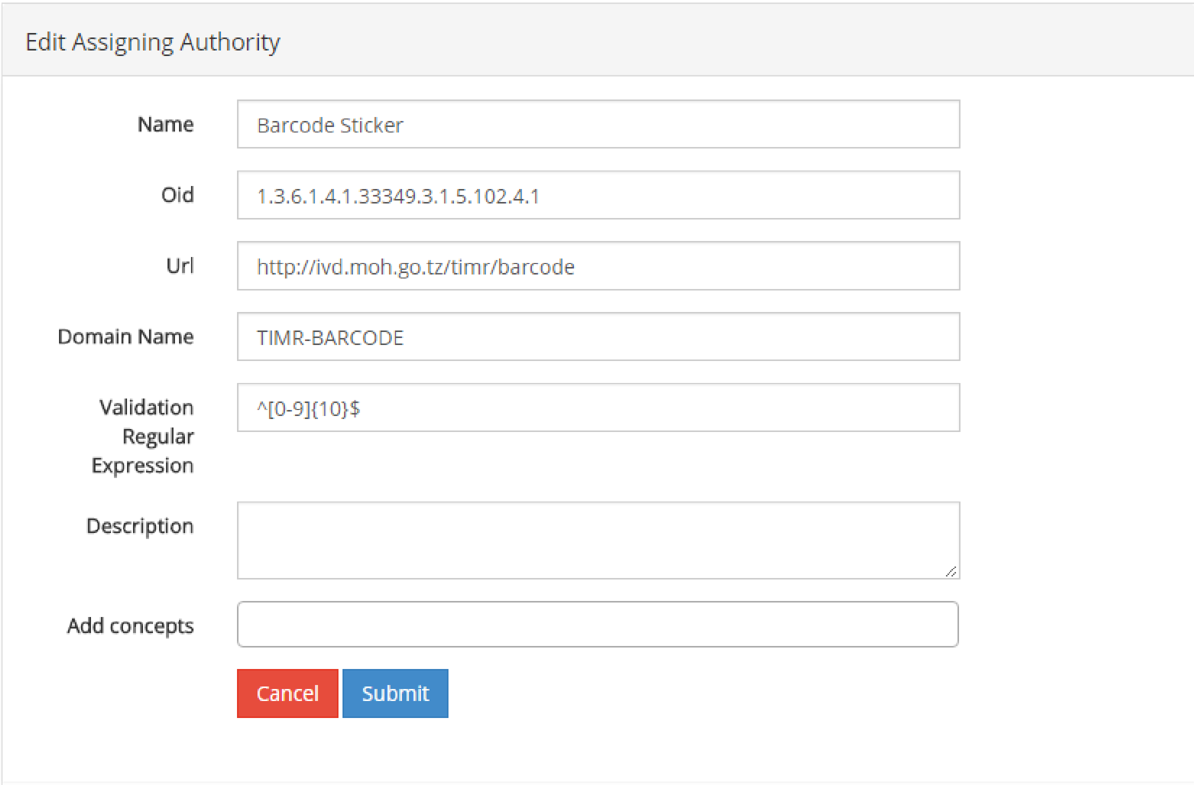
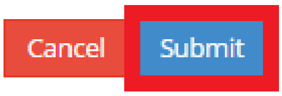


Figure 7.11 - Edit Assigning Authority

Press the **Submit** button after making any changes. You will be brought back to the **View Code System** page. (See the figure below)



Adding a New Concept

Step 1: From the **Edit Assigning Authority** page, in the **Edit Assigning Authority** area, start typing into the **Add concepts** field (See the figure below)

Note: Enter 2 or more characters to search for a concept

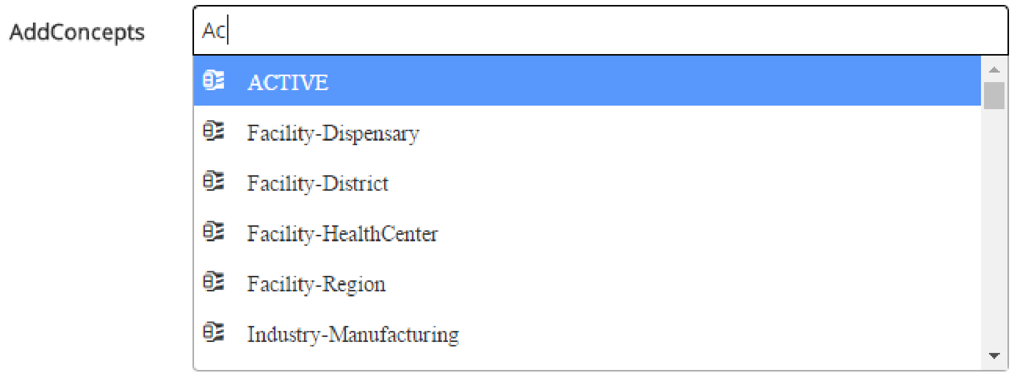
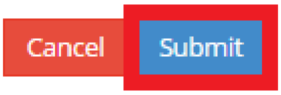


Figure 7.12 - Add Concepts field

You are only able to add one concept each time you edit the assigning authority.

Step 2: Once you are satisfied with your changes, press the **Submit** button (See the figure below)



You will be returned to the **View Assigning Authority** page. To add more concepts to the assigning authority, repeat the previous steps.

7.5.2 Concepts Area

The **Concepts** area displays a list of all concepts associated with the assigning authority. You are also able to view or delete existing concepts.

Viewing a Concept

You can view existing concepts using the **Edit Assigning Authority** page.

Step 1: From the **Edit Assigning Authority** page, in the **Authority Scope** area, click the **Edit** button next to the concept you wish to edit (See the figure below)

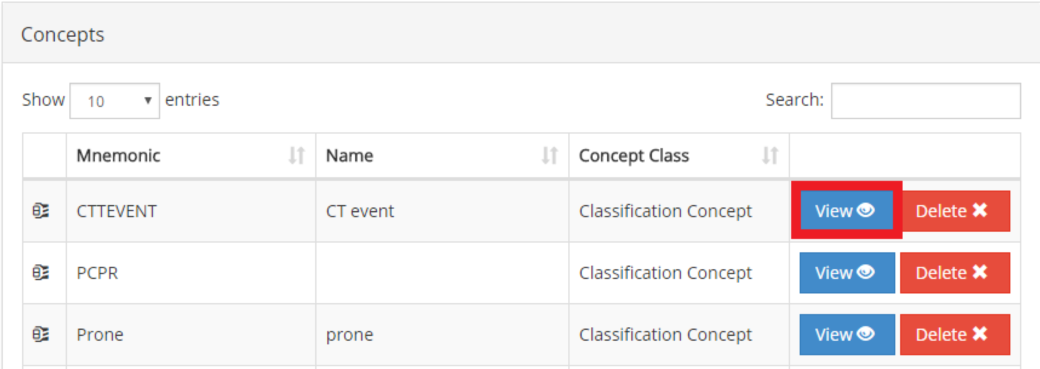


Figure 7.13 - View Concept button

You will be brought to the **View Concept** page. Here you can view details about the concept, but no changes can be made (See the figure below). To make changes to concepts, see the section above on **Concepts** .

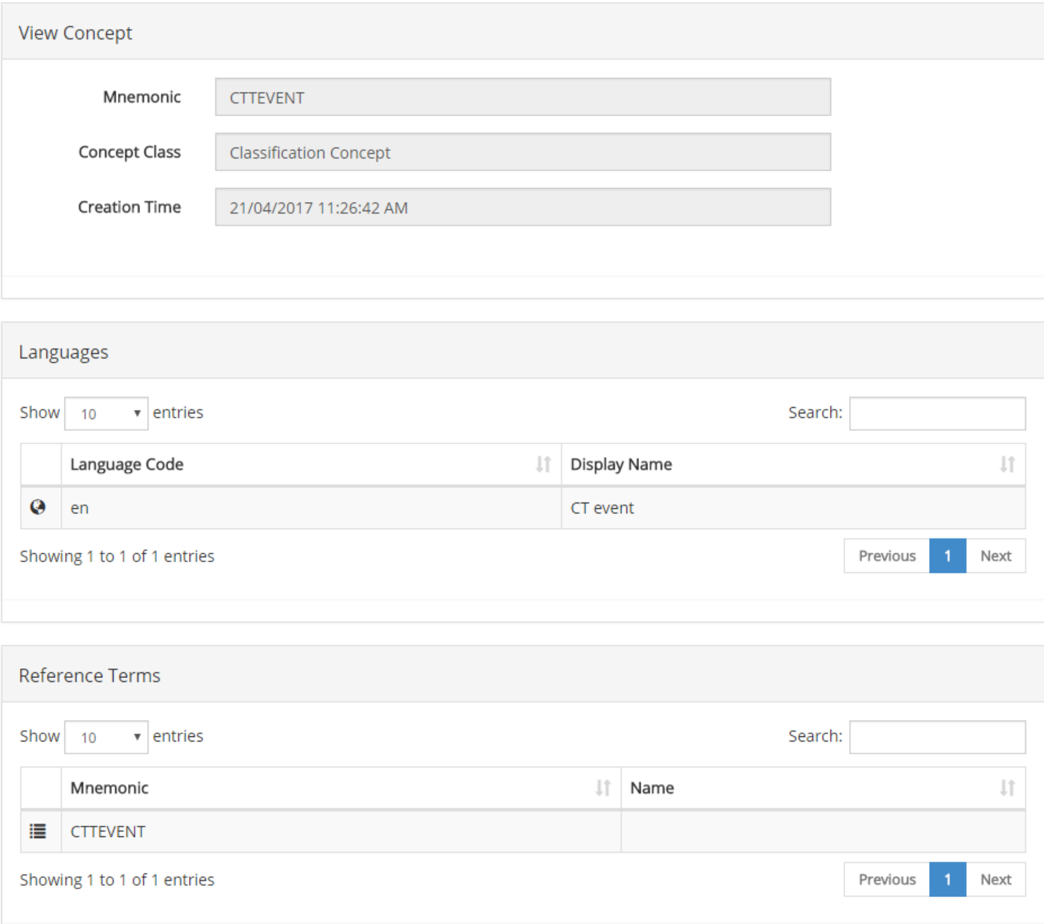


Figure 7.14 - View Concept page

Deleting a Concept

You can delete concepts using the **Edit Assigning Authority** page.

Step 1: From the **Edit Assigning Authority** page, in the **Authority Scope** area, click the **Delete ✖** button next to the concept you wish to delete (See the figure below)

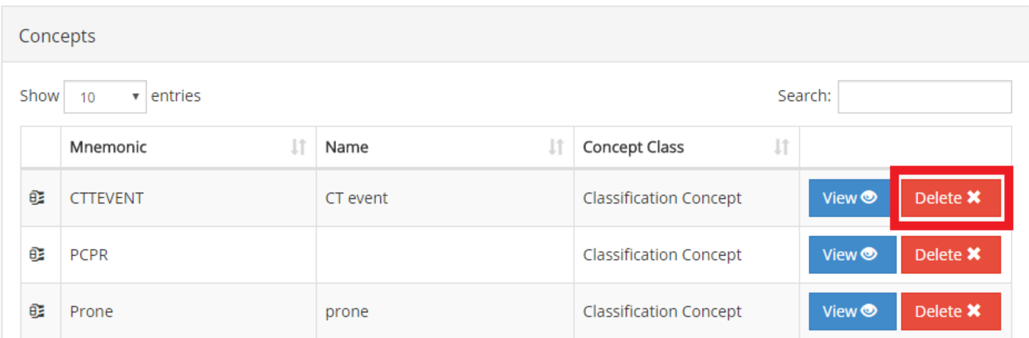


Figure 7.15 - Delete Concept button

The concept will be deleted and you will be brought to the **View Assigning Authority** page.

Chapter 8: Certificates ✹

This section is currently under development and is unavailable.

Chapter 9: Code System

The **Code Systems** page allows you to search for code systems, and view or manage them. (See the figure below)

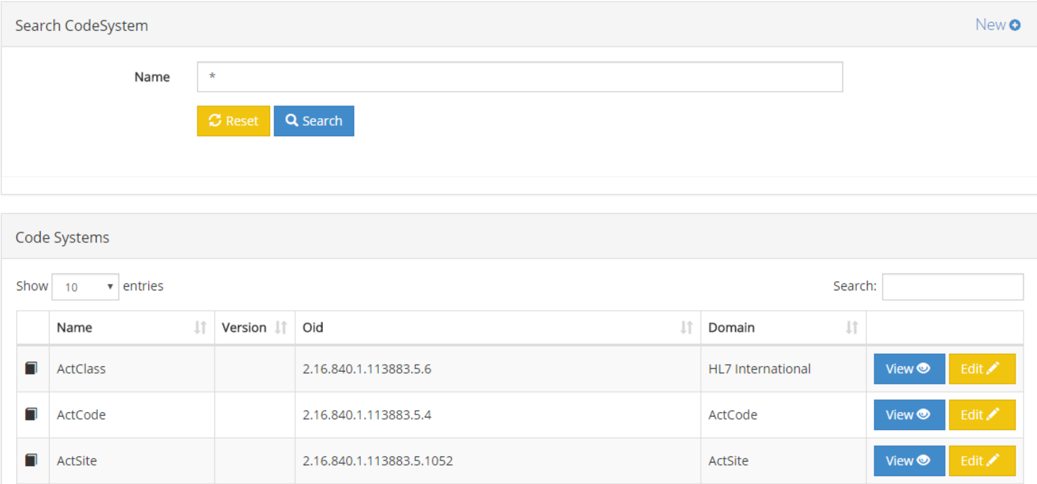


Figure 9.1 - Code Systems page

9.1 Search Code Systems

If you are looking for a specific code system that already exists in the system you can use the **Search Code System** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Code System** area, enter the name of a code system (See the figure below)

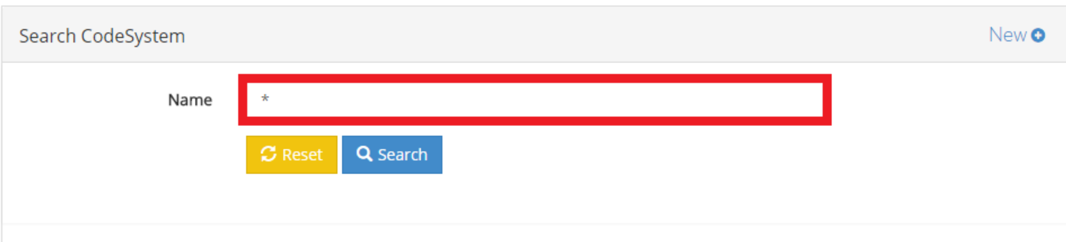
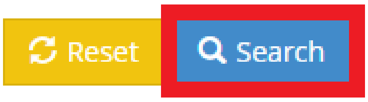


Figure 9.2 - Searching for a Code System

Step 2: Click the **Search** 🔍 button (See the figure below)



Search results will appear in the **Code Systems** area below. See the following section on **Code Systems** for more information.

9.2 Code Systems

The **Code Systems** area of the **Code Systems** page displays a list of all the code systems in the search results. By default the search results load with all code systems available. (See the figure below)

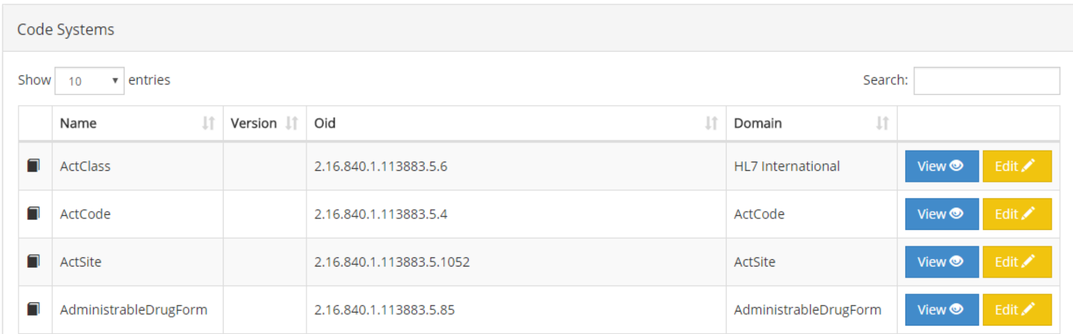


Figure 9.3 - Code Systems

Code systems displayed here list details including the name, version, oid (object identifier) and domain. Code systems can be viewed and managed from this page.

New code systems can also be added from this page. To add a new code system, or view and manage an existing code system, see sections below.

9.3 New Code System

When a new code system is required, you can create a new code system. To create a new code system:

Step 1: From the **Code Systems** page, click the **New** button in the top right of the **Search Code System** area (See the figure below)

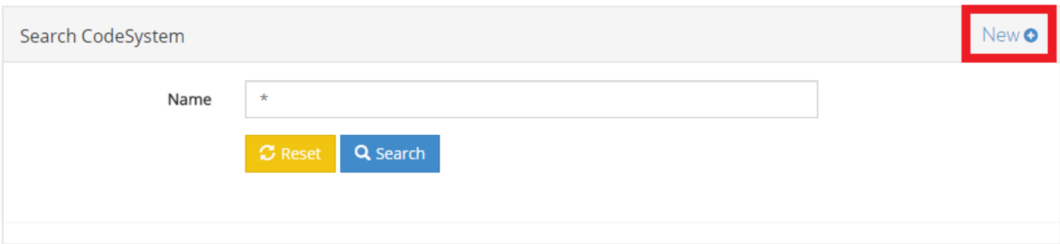


Figure 9.4 - New code system button

Step 2: Enter the fields for the code system you are adding (See the figure below):

- Name
- Description
- Domain
- Oid (Required)

Note: This is the object identifier, this should be a unique value

- Url (Required)
- Version

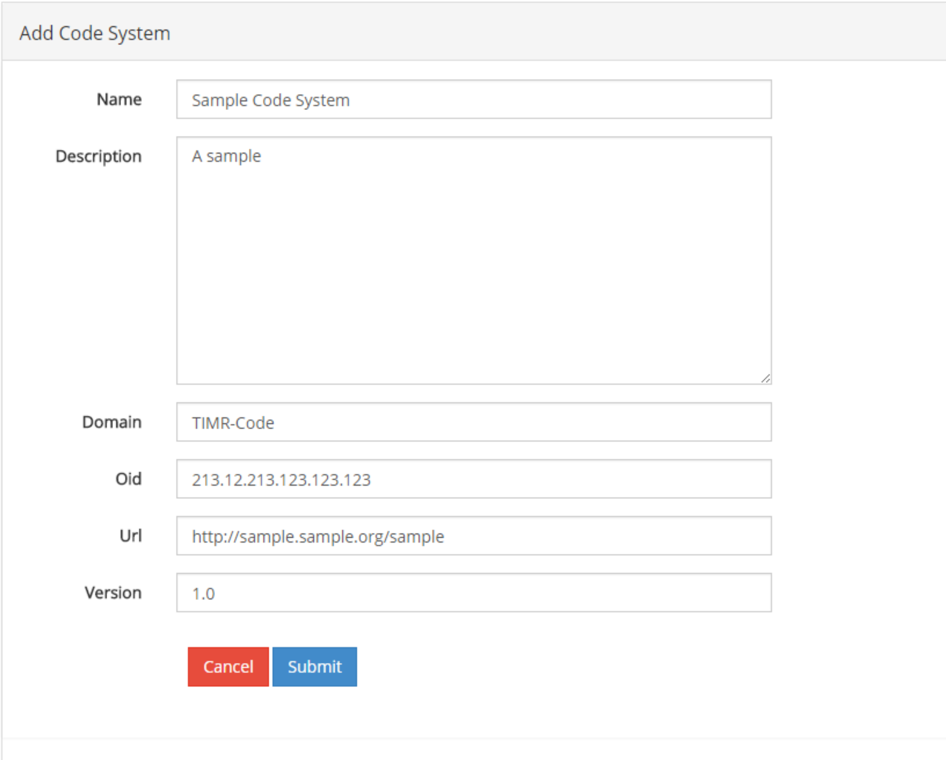
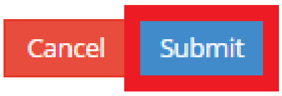


Figure 9.5 - Add Code System page

Step 3: Press the **Submit** button to create the code system (See the figure below)



If created successfully you should see a popup display message saying the *Code System created successfully*. From here you will see the **View Code System** page. See below for more details on viewing and editing code systems.

9.4 View Code Systems

After finding a code system in the search results, or creating a new code system you can view the code systems details.

Step 1: From the **Code Systems** page, find a code system you would like to view and press the **View** button (See the figure below)

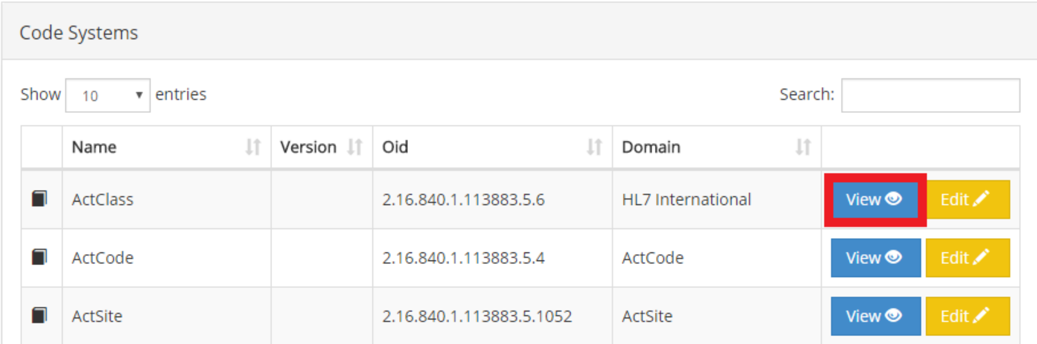


Figure 9.6 - View Code System button

You will be brought to **View Code System** page for the code system you selected to view.

9.4.1 View Code System Area

The **View Code System** area displays the initial information for the code system that was created. The code systems name, description, domain, oid (object identifier), URL and version for the code system are displayed in this area. (See the figure below)

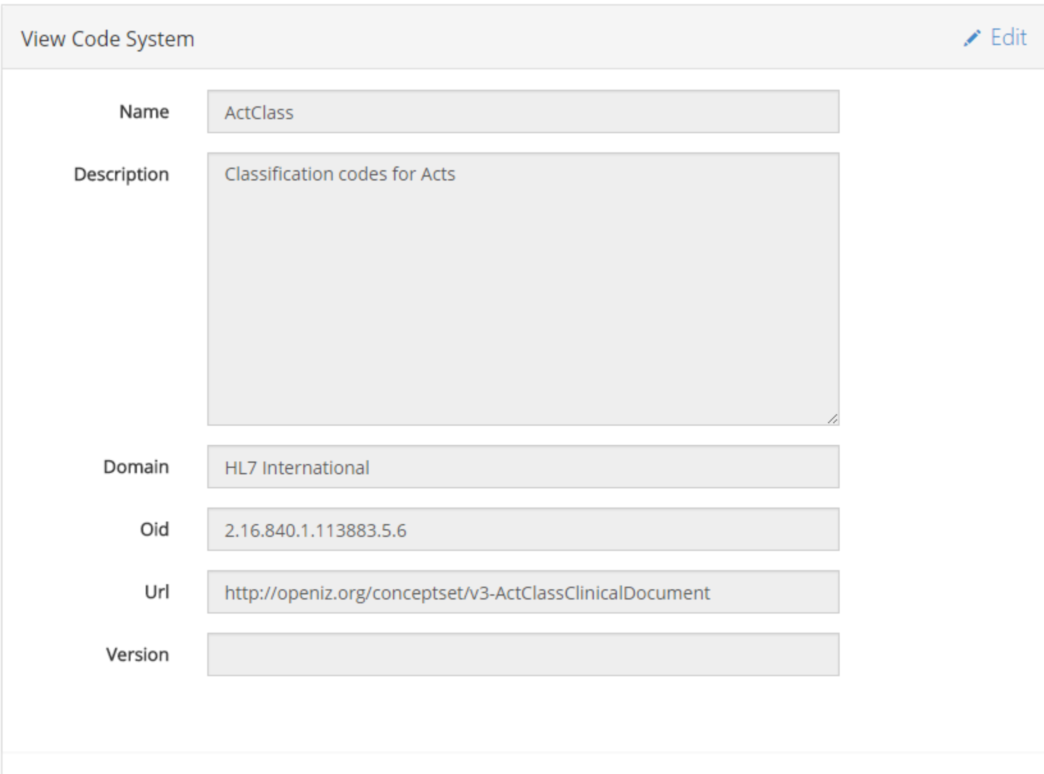


Figure 9.7 - View Code System area

9.5 Edit Code Systems

Each code system has several components that can be edited.

To access the **Edit Code System** page from the **Code System** page:

Step 1: Find a code system using the search bar and click the **Edit** button (See the figure below)

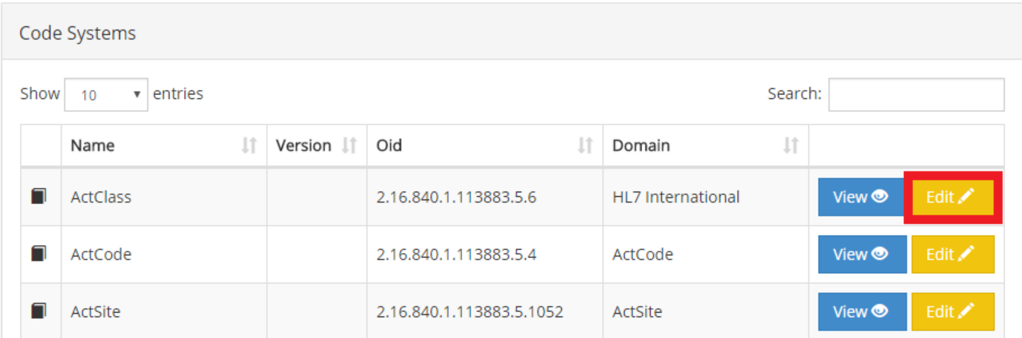


Figure 9.8 - Edit Code System from the Code Systems page

To access the **Edit Code System** page from the **View Code System** page:

Step 1: Click the **Edit** button (See the figure below)

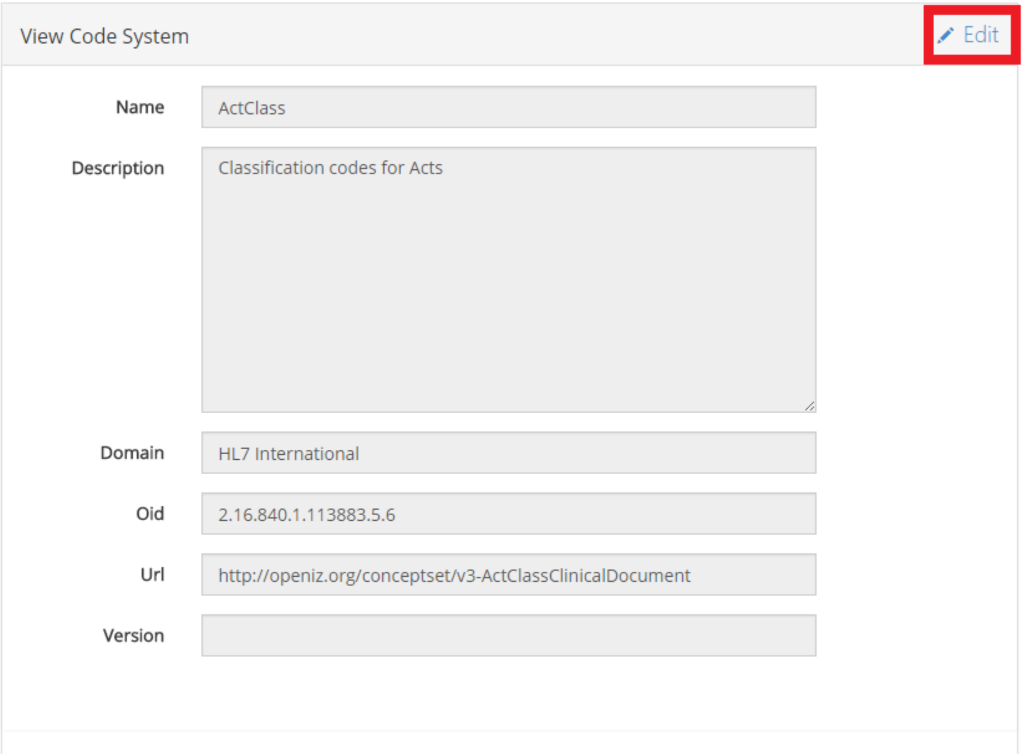


Figure 9.9 - Edit Code System from the View Code System page

You will be brought to **Edit Code System** page for the code system you selected to edit. From this page you can modify fields.

9.5.1 Edit Code System Area

In this area you can change all the basic values set for the code system you are viewing. *Required fields: Oid, URL.* (See the figure below)

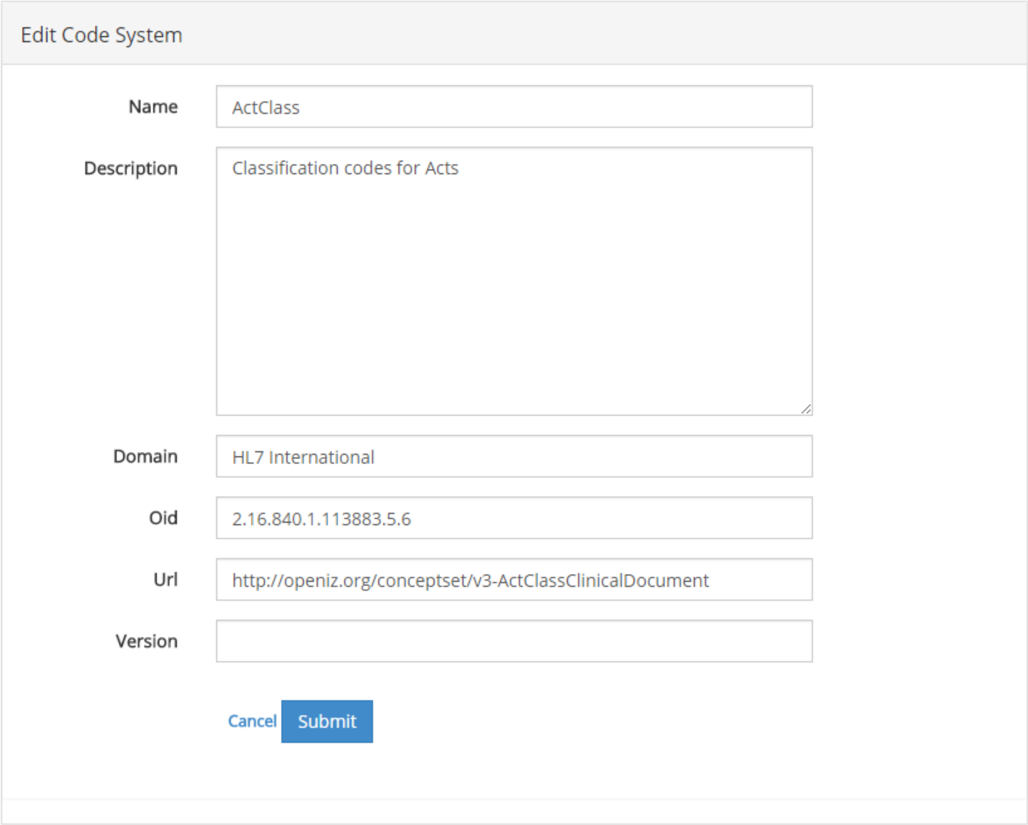
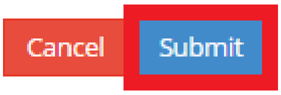


Figure 9.10 - Edit Code System

Press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Code System** page.

Chapter 10: Concepts

The **Concepts** page allows you to search for concepts, or manually manage concepts and reference terms. (See the figure below)

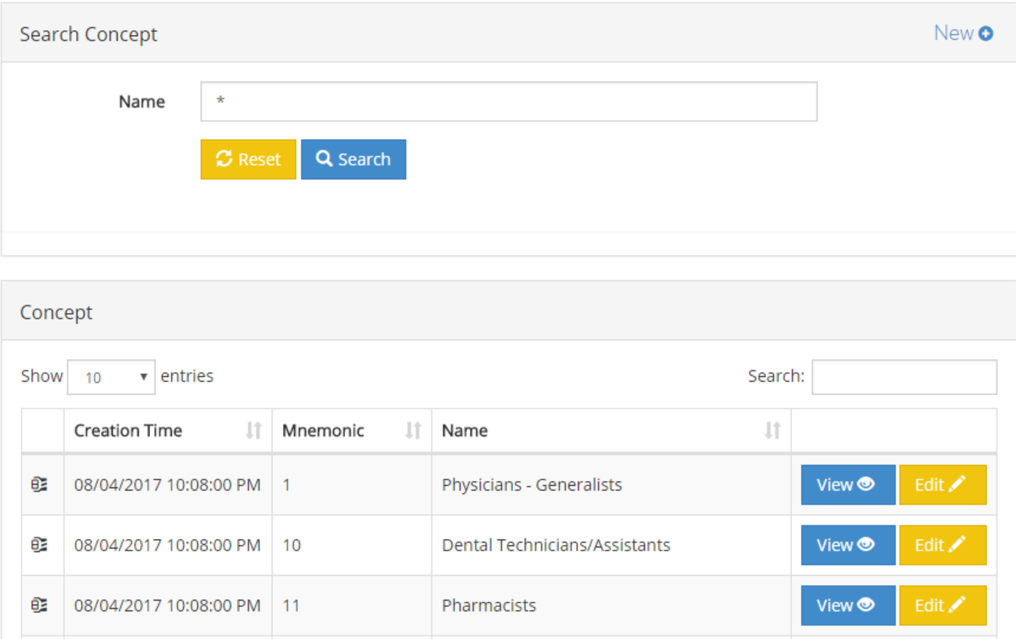


Figure 10.1 - The Concepts page

10.1 Search Concepts

If you are looking for a specific concept that already exists in the system you can use the **Search Concept** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Concept** area, enter the name of the concept you are looking for (See the figure below)

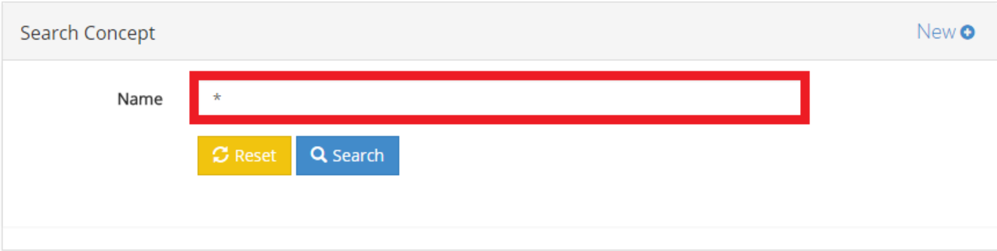
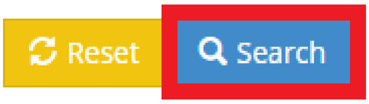


Figure 10.2 - Searching for a Concept

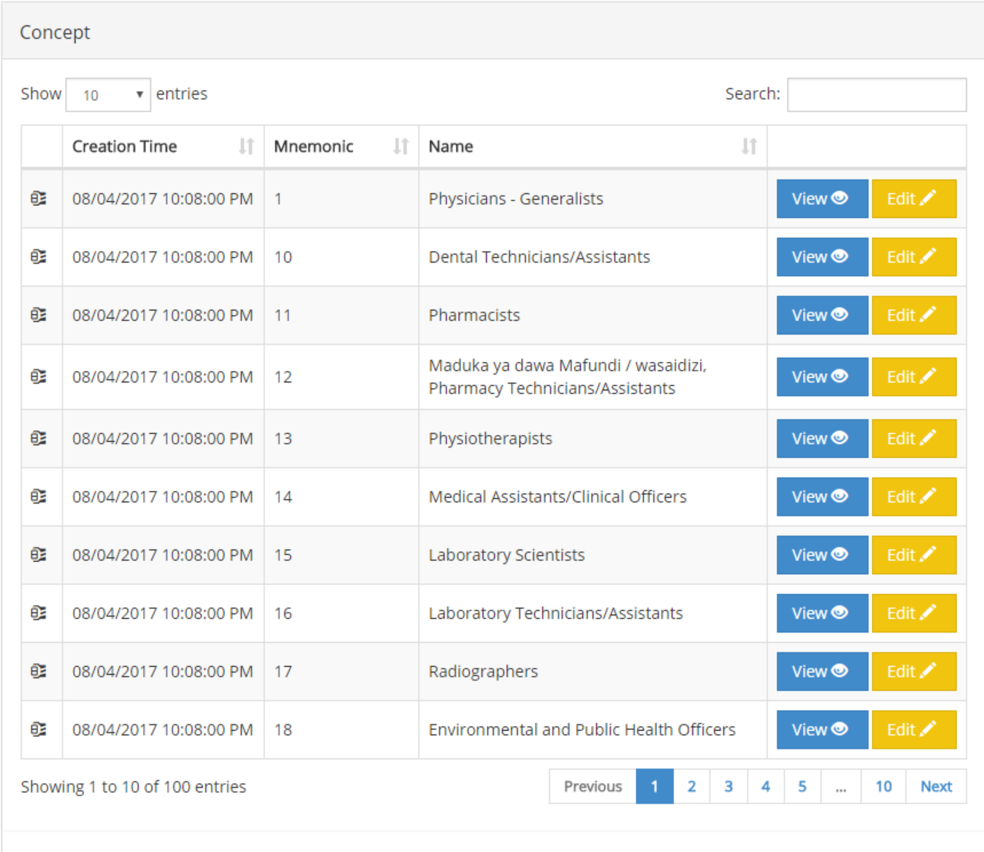
Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Concept** area below. See the following section on **Concepts** for more information.

10.2 Concepts

The **Concept** area of the **Concept** page displays a list of all the concepts in the search results. By default the search results load with all concepts available. (See the figure below)



Concept

Show 10 entries Search:

	Creation Time	Mnemonic	Name	
	08/04/2017 10:08:00 PM	1	Physicians - Generalists	View Edit
	08/04/2017 10:08:00 PM	10	Dental Technicians/Assistants	View Edit
	08/04/2017 10:08:00 PM	11	Pharmacists	View Edit
	08/04/2017 10:08:00 PM	12	Maduka ya dawa Mafundi / wasaidizi, Pharmacy Technicians/Assistants	View Edit
	08/04/2017 10:08:00 PM	13	Physiotherapists	View Edit
	08/04/2017 10:08:00 PM	14	Medical Assistants/Clinical Officers	View Edit
	08/04/2017 10:08:00 PM	15	Laboratory Scientists	View Edit
	08/04/2017 10:08:00 PM	16	Laboratory Technicians/Assistants	View Edit
	08/04/2017 10:08:00 PM	17	Radiographers	View Edit
	08/04/2017 10:08:00 PM	18	Environmental and Public Health Officers	View Edit

Showing 1 to 10 of 100 entries Previous 1 2 3 4 5 ... 10 Next

Figure 10.3 - Concepts

Concepts displayed here show the creation time, mnemonic, and name. Concepts can be viewed and managed from this page.

New concepts can also be added from this page. To add a new concept, or view and manage an existing concept, see sections below.

10.3 New Concept

When a new concept is needed to be added to the system, you can create a new concept. To create a new concept:

Step 1: From the **Concept** page, click the **New** button in the top right of the **Search Concept** area (See the figure below)

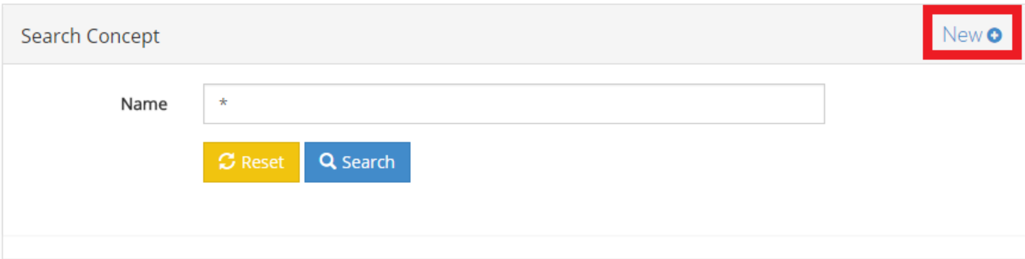


Figure 10.4 - New Concept button

Step 2: You will be brought to the **Create Concept** page, Enter the fields for the concept you are adding (See the figure below):

- Mnemonic (Required)

  Note: This is memorable value for your concept

- Name (Required)
- Language (Required)
- Concept Class (Required)

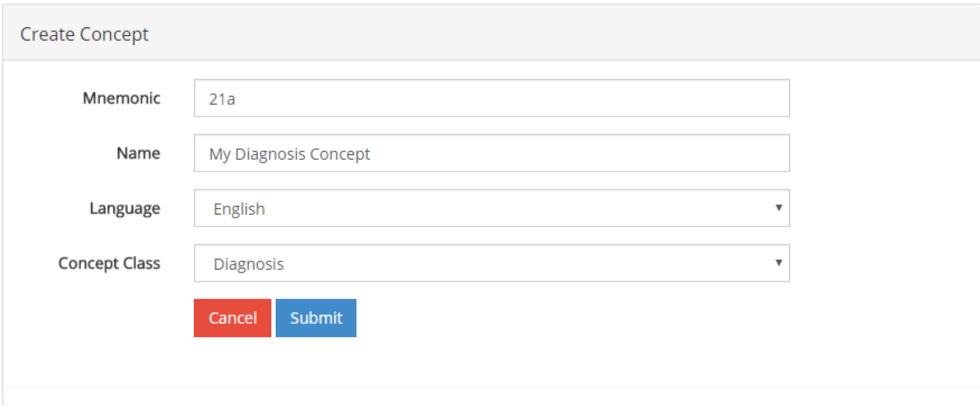
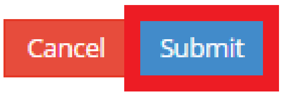


Figure 10.5 - Create Concept page

Step 3: Press the **Submit** button to create the concept (See the figure below)



If created successfully you should see a popup display message saying the *Concept created successfully*. From here you will see the **View Concept** page. See below for more details on viewing and editing concepts.

10.4 View Concepts

After finding a concept in the search results, or after creating a new concept you can view the concept's details.

Step 1: From the **Concepts** page, find a concept you would like to view and press the **View** button (See the figure below)

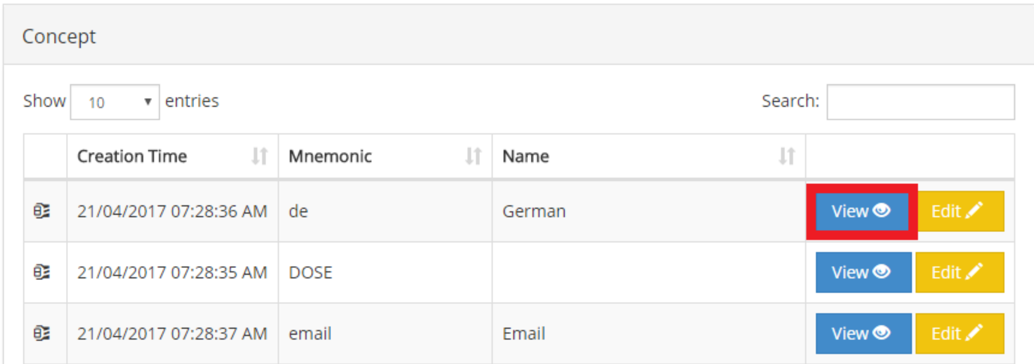


Figure 10.6 - View Concept button

You will be brought to **View Concept** page for the concept you selected to view. The **View Concept** page displays the initial information for the concept that was created as well as languages and reference terms related to the concept. (See the figure below)

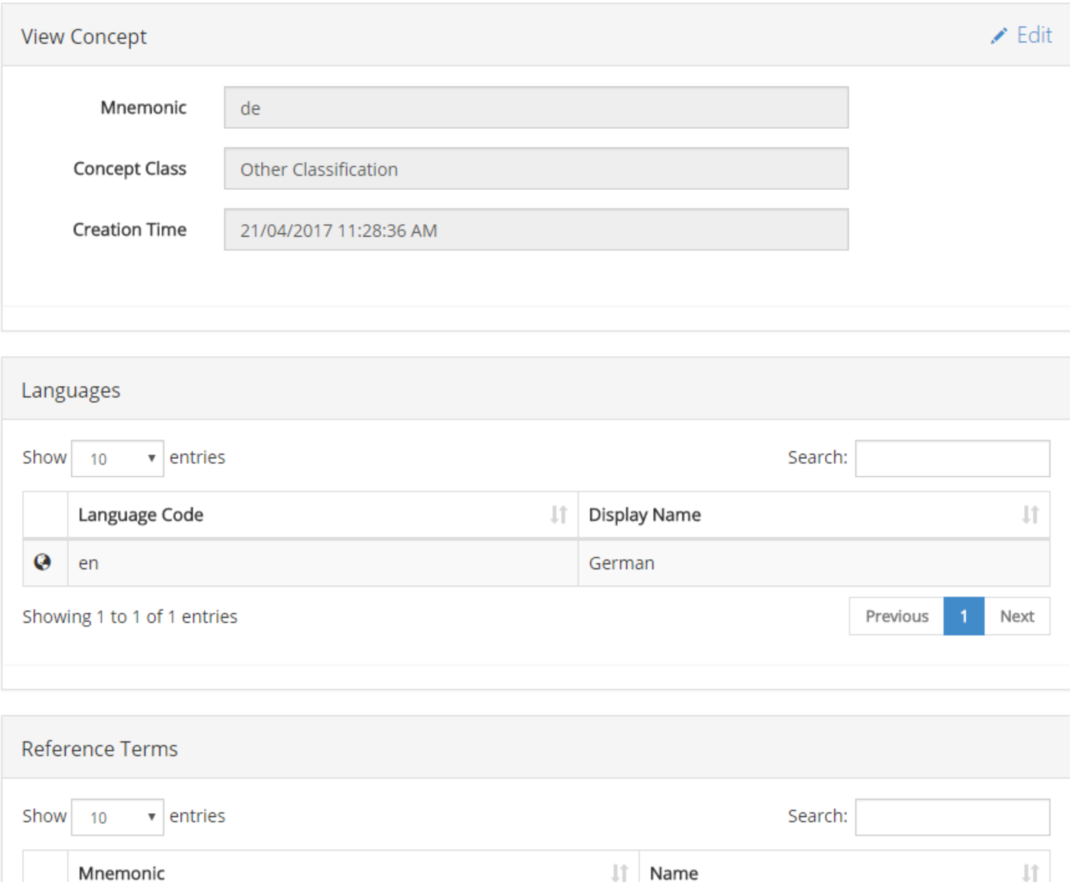


Figure 10.7 - View Concept page

10.4.1 View Concept Area

The **View Concept** area displays the initial information for the concept that was created. (See the figure below)

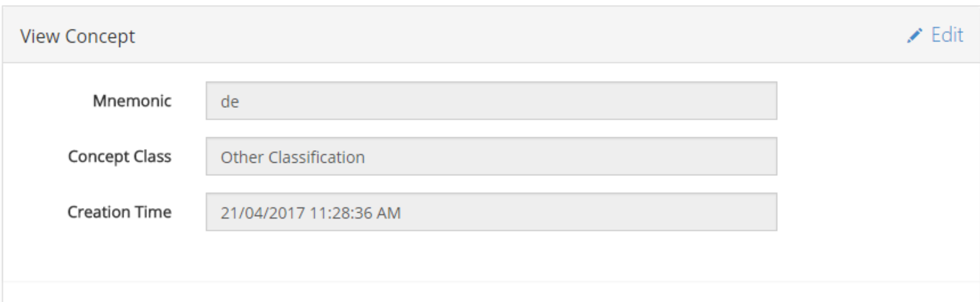


Figure 10.8 - View Concept area

10.4.2 Languages

The **Languages** area displays a list of all languages for the concept. (See the figure below)

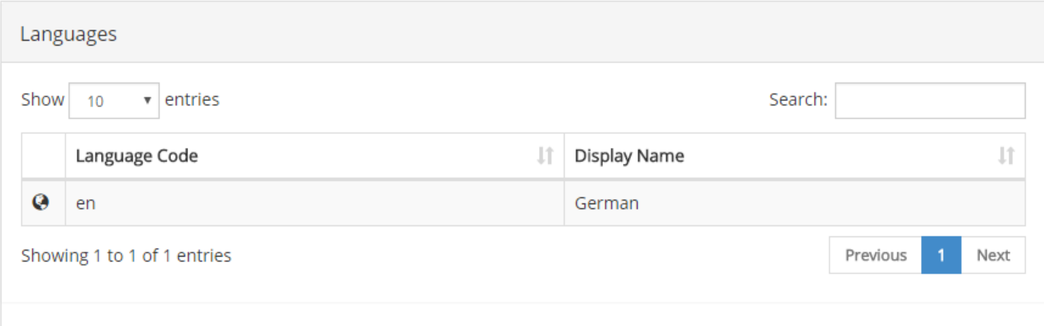


Figure 10.9 - Languages area

10.4.3 Reference Terms

The **Reference Terms** area provides a list of all the reference terms that have a reference term with the concept that is currently being viewed. Listed here is the mnemonic and name for each reference term. (See the figure below)

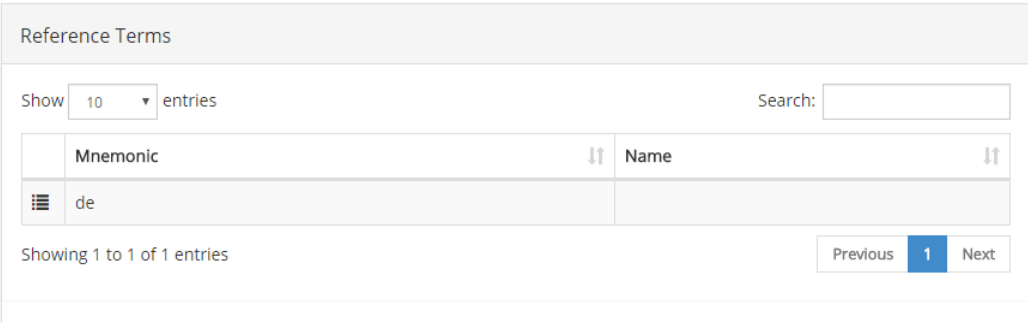


Figure 10.10 - Reference Terms area

10.5 Edit Concept

Each concept has several components that can be edited. You can change the initial details, add or change languages, and add or change reference terms.

To access the **Edit Concept** page from the **Concepts** page:

Step 1: Find a concept using the search bar and click the **Edit** button (See the figure below)

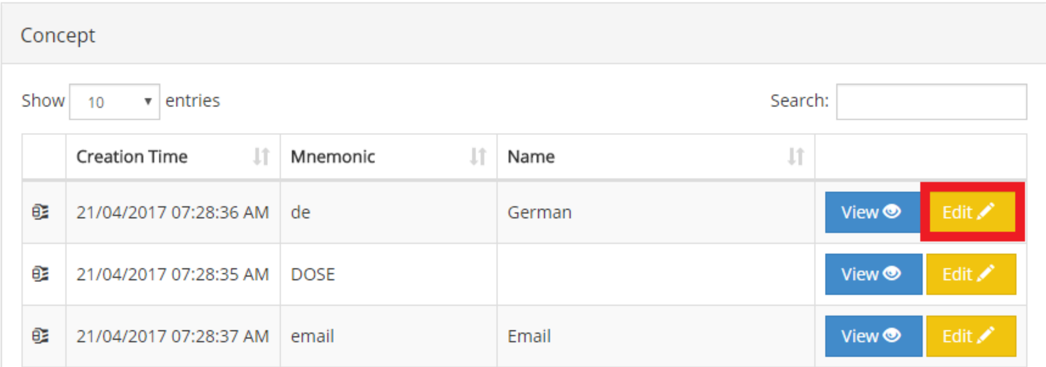


Figure 10.11 - Edit Concept from the Concepts page

To access the **Edit Concept** page from the **View Concept** page:

Step 1: Click the **Edit** button (See the figure below)

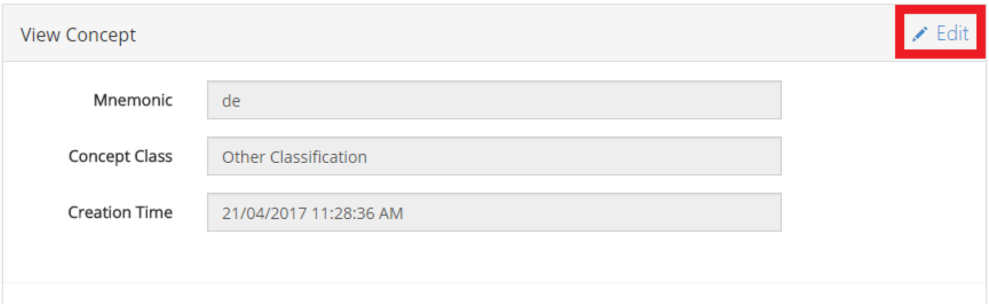


Figure 10.12 - Edit Concept from the View Concept page

You will be brought to **Edit Concept** page for the concept you selected to edit. From this page you can modify fields and add/edit/remove languages and reference terms.

10.5.1 Edit Concept Area

In this area you can change all the basic values set for the concept you are viewing. *Required fields: Mnemonic.*

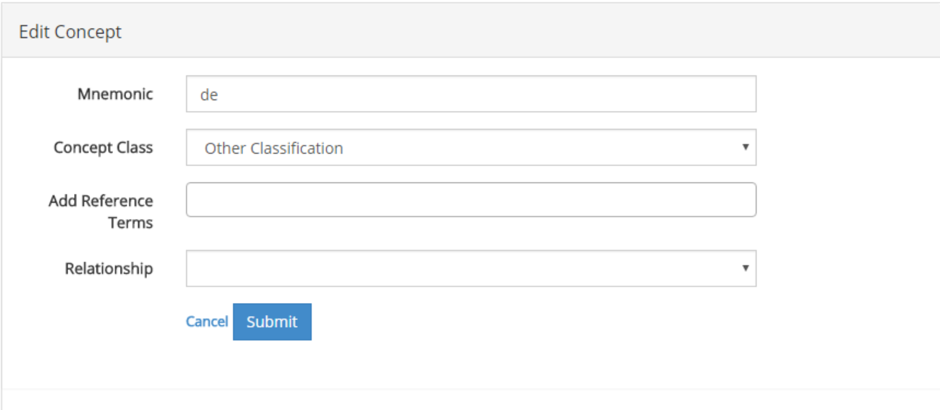


Figure 10.13 - Edit Concept page

10.5.2 Languages Area

The **Languages** area displays a list of all languages for the concept. You are also able to add new languages and edit or delete existing languages.

Creating a New Language

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **New** button (See the figure below)

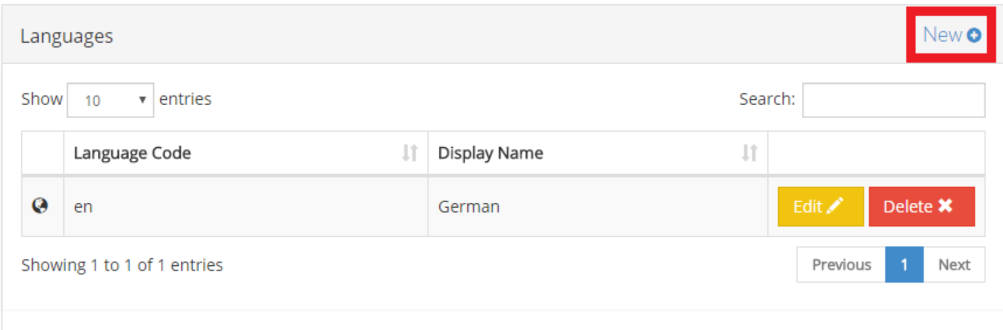


Figure 10.14 - New Language button

You will be brought to the **Add Language** page. Here you can add a language by using the **Add Language** area and also see the list of current languages in the **Languages** area of this page. (See the figure below)

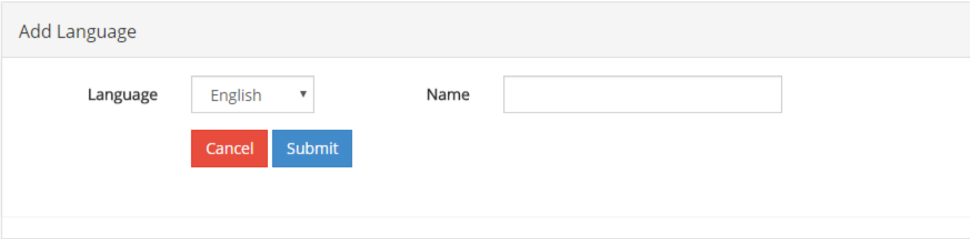
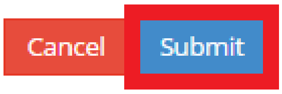


Figure 10.15 - Add Language page

Step 2: In the **Add Language** area:

- Select a **Language** (Required)
- Enter a **Name** (Required)

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new language you will be returned to the **Edit Concept** page.

Editing a Language

You can view and edit existing languages using the **Edit Language** page.

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **Edit** button next to the language you wish to edit (See the figure below)

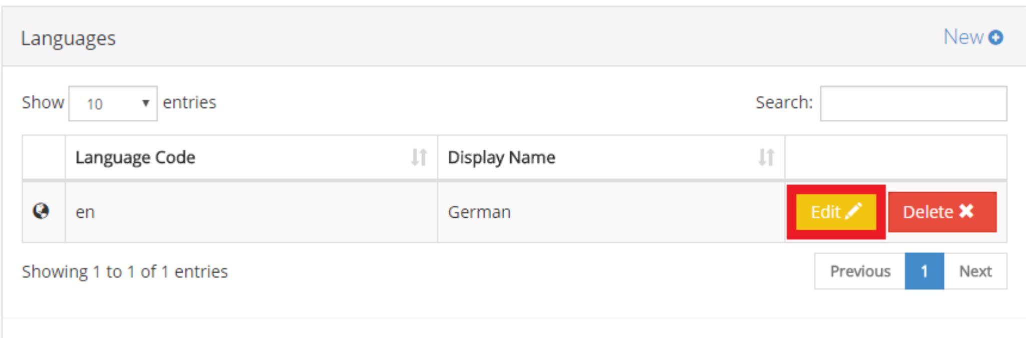


Figure 10.16 - Edit Language button

You will be brought to the **Edit Language** page. Here you can edit the language by using the **Edit Language** area and also see the list of current languages in the **Languages** area of this page. (See the figure below)

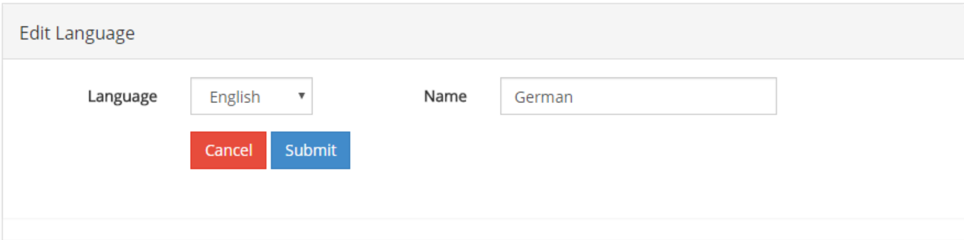
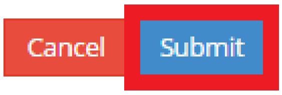


Figure 10.17 - Edit Language page

Step 2: In the **Edit Language** area:

- Select a **Type** (Required)
- Enter a **Name** (Required)

Step 3: Press the **Submit** button (See the figure below)



Deleting a Language

You can delete languages using the **Edit Language** page.

Step 1: From the **Edit Concept** page, in the **Languages** area, click the **Delete ✖** button next to the language you wish to delete (See the figure below)

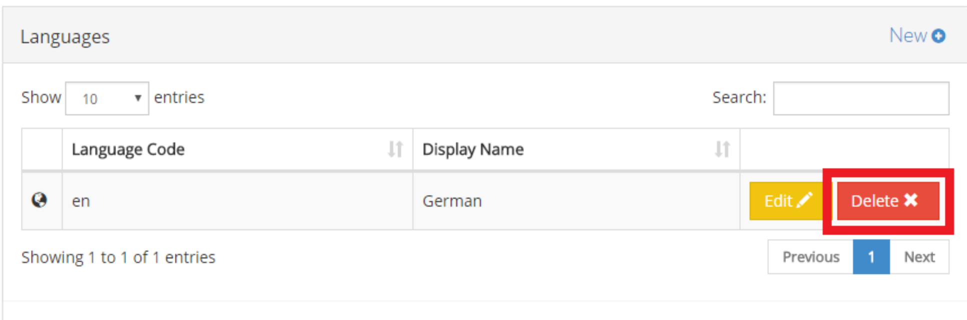


Figure 10.18 - Delete Language

The language will be deleted and the **Edit Concept** page will be refreshed.

10.5.3 Reference Terms Area

The **Reference Terms** area displays a list of all reference terms for the concept. You are also able to add new reference terms and edit or delete existing reference terms.

Creating a New Reference Term Name

Step 1: From the **Edit Concept** page, in the **Reference Terms** area, click the **Edit** button (See the figure below)

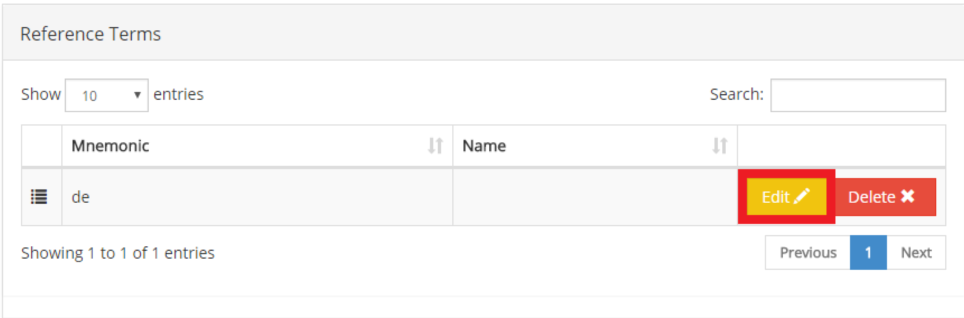


Figure 10.19 - Edit Reference Terms button

You will be brought to the **Edit Reference Term** page.

Step 2: In the **Reference Term Name** area, click the **New** button (See the figure below)

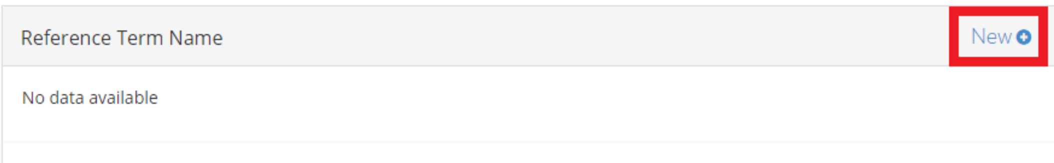


Figure 10.20 - New Reference Term Name button

You will be brought to the **Add Reference Term Name** page. Here you can add a new reference term by using the **Add Reference Term Name** area and also see the list of current reference terms in the **Reference Terms** area of this page. (See the figure below)

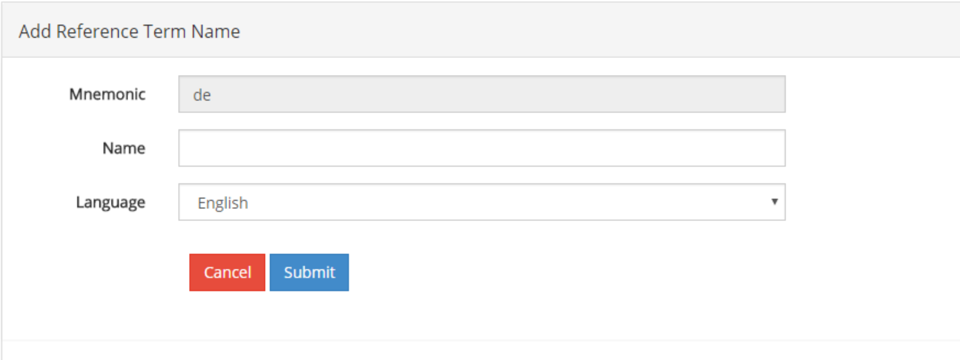
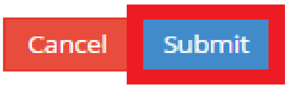


Figure 10.21 - Add Reference Term Name page

Step 3: In the **Add Reference Term Name** area:

- Enter a **Name** (Required)
- Select a **Language** (Required)

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new reference term you will be returned to the **Edit Reference Term** page.

Editing a Reference Term

You can view and edit existing reference term using the **Edit Reference Term** page.

Step 1: From the **Edit Concept** page, in the **Reference Term** area, click the **Edit** button next to the reference term you wish to edit (See the figure below)

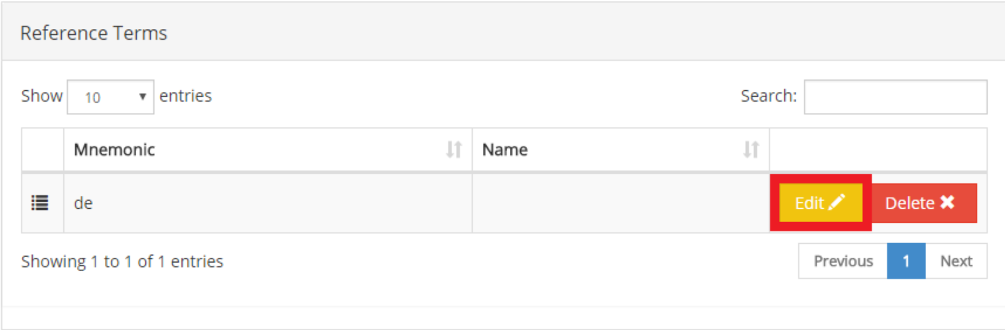


Figure 10.22 - Edit Reference Term button

You will be brought to the **Edit Reference Term** page. Here you can edit the reference term by using the **Edit Reference Term** area and also see the list of current reference term names in the **Reference Term Names** area of this page. (See the figure below)

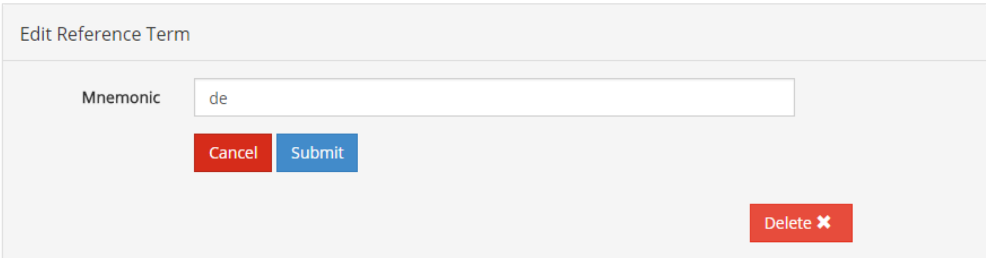
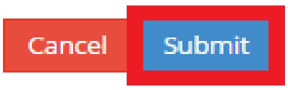


Figure 10.23 - Edit Reference Term page

Step 2: In the **Edit Reference Term** area:

- Enter a **Mnemonic** (Required)

Step 3: Press the **Submit** button (See the figure below)



You will be returned to the **View Reference Term** page for the reference term you were just editing.

Deleting a Reference Term

You can delete reference terms using the **Edit Concept** page or while editing a reference term.

Deleting a reference term from the **Edit Concept** page:

Step 1: In the **Reference Terms** area, click the **Delete ✖** button next to the reference term you wish to delete (See the figure below)

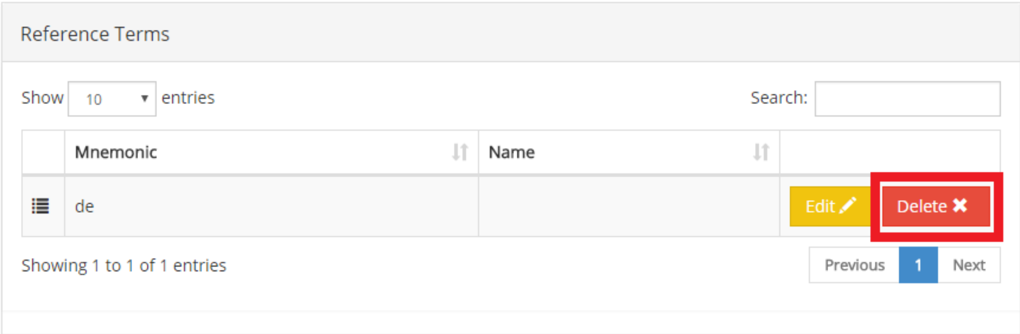


Figure 10.24 - Delete Reference Term button

The reference term will be deleted and the **Edit Concept** page will be refreshed.

Deleting a reference term from the **Edit Reference Term** page while editing a reference term (to **Edit** a Reference term see the section above this):

Step 1: In the **Edit Reference Term** area, click the **Delete ✖** button (See the figure below)

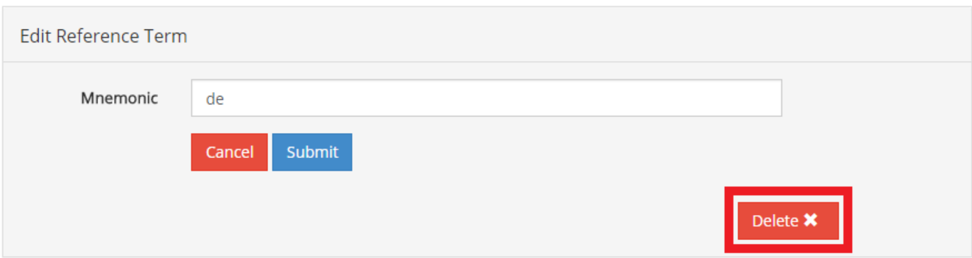


Figure 10.24 - Delete Reference Term button

The reference term will be deleted and the **Edit Concept** page will be refreshed.

Chapter 11: Concept Sets

The **Concept Sets** page allows you to search for concept sets, and view or manage them. (See the figure below)

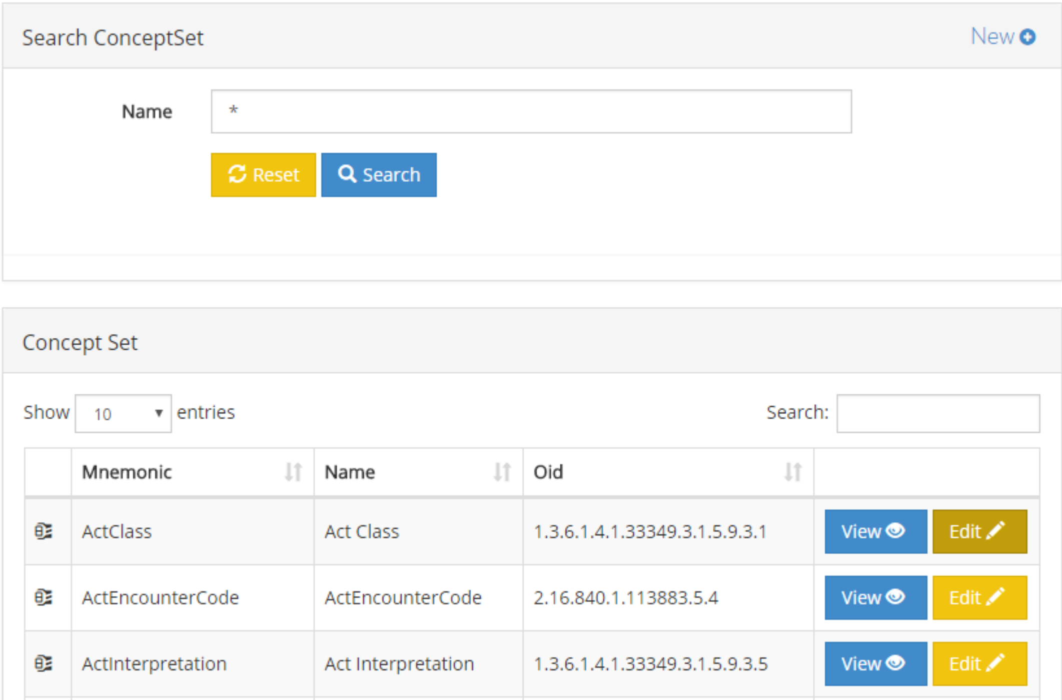


Figure 11.1 - Concept Sets page

11.1 Search Concept Sets

If you are looking for a specific concept set that already exists in the system you can use the **Search Concept Set** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Concept Set** area, enter the name of a concept set (See the figure below)

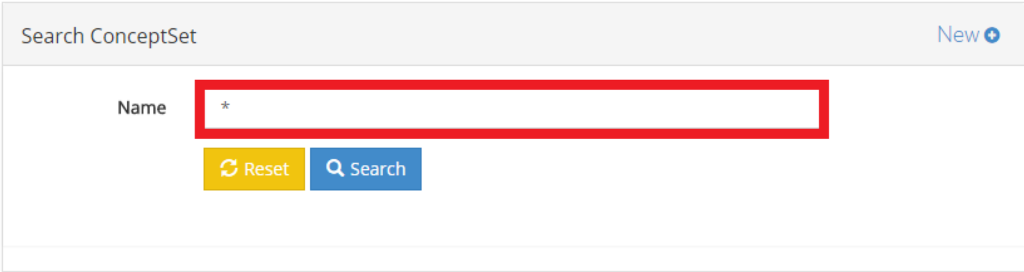
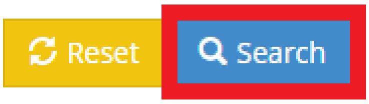


Figure 11.2 - Searching for a Concept Set

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Concept Sets** area below. See the following section on **Concept Sets** for more information.

11.2 Concept Sets

The **Concept Sets** area of the **Concept Sets** page displays a list of all the concept sets in the search results. By default the search results load with all concept sets available. (See the figure below)

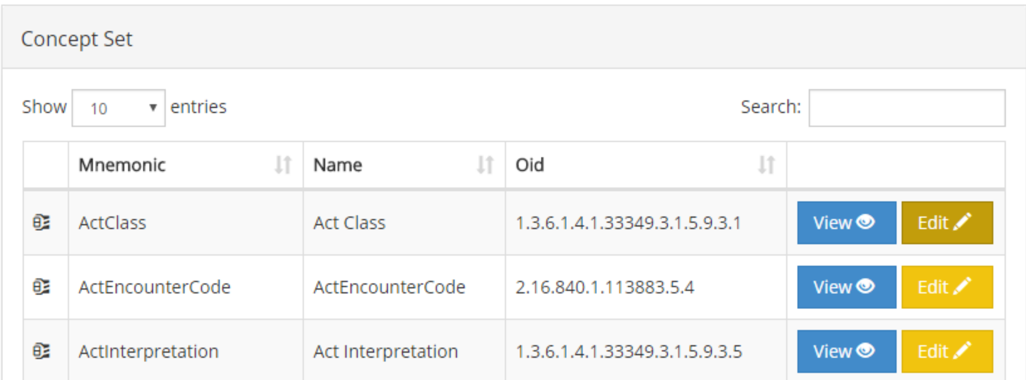


Figure 11.3 - Concept Sets

Concept sets displayed here list the mnemonic, name and oid (object identifier). Concept sets can be viewed and managed from this page.

New concept sets can also be added from this page. To add a new concept set, or view and manage an existing concept set, see sections below.

11.3 New Concept Set

When a new concept set is required, you can create a new concept set. To create a new concept set:

Step 1: From the **Concept Sets** page, click the **New** button in the top right of the **Search Concept Set** area (See the figure below)

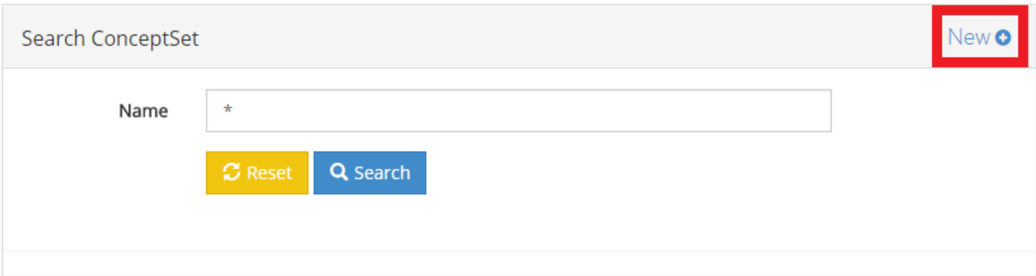


Figure 11.4 - New concept set button

Step 2: Enter the fields for the concept set you are adding (See the figure below):

- Mnemonic (Required)
- Name (Required)
- Oid (Required)

  Note: This is the object identifier, this should be a unique value

- Url (Required)

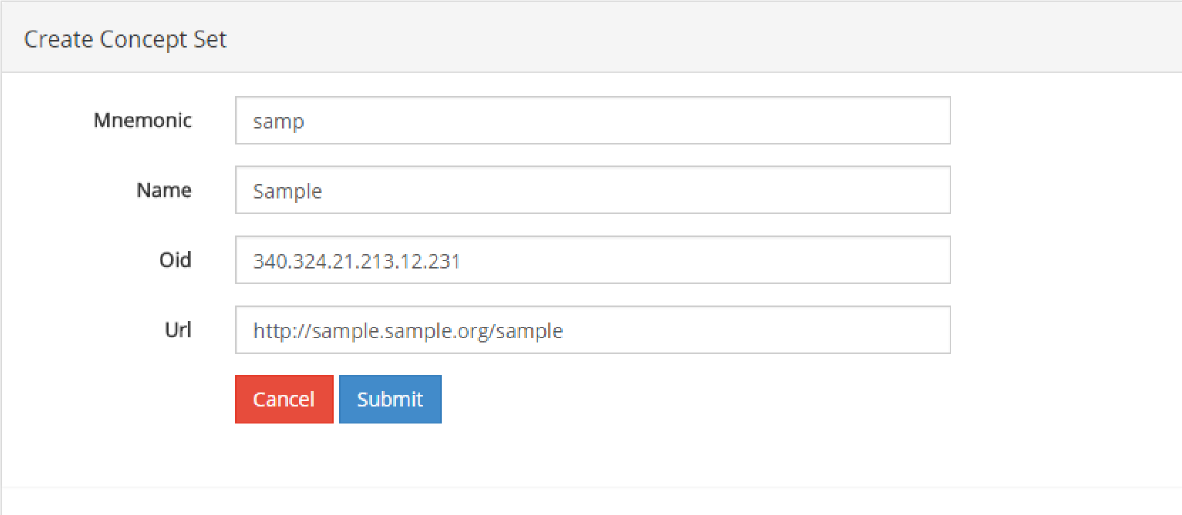
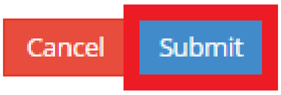


Figure 11.5 - Add Concept Set page

Step 3: Press the **Submit** button to create the concept set (See the figure below)



If created successfully you should see a popup display message saying the *Concept Set created successfully*. From here you will see the **View Concept Set** page. See below for more details on viewing and editing concept sets.

11.4 View Concept Sets

After finding a concept set in the search results, or creating a new concept set you can view the concept sets details.

Step 1: From the **Concept Sets** page, find a concept set you would like to view and press the **View** button (See the figure below)

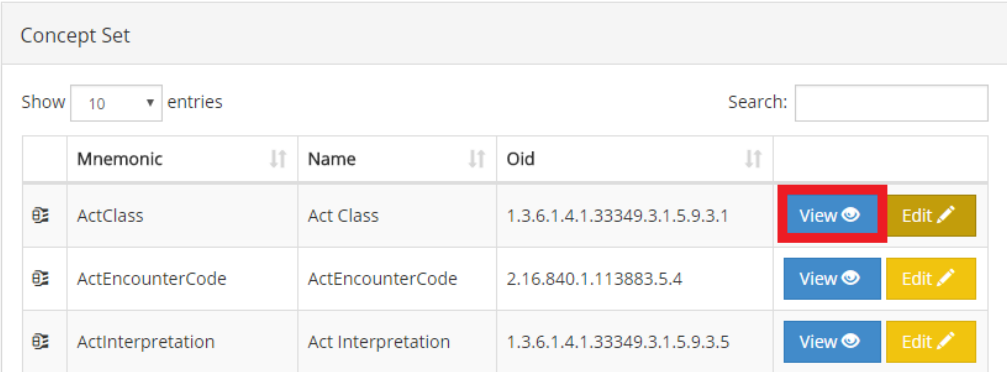


Figure 11.6 - View Concept Set button

You will be brought to **View Concept Set** page for the concept set you selected to view.

11.4.1 View Concept Set Area

The **View Concept Set** area displays the initial information for the concept set that was created. The mnemonic, name, oid (object identifier) and url for the concept set are listed in this area. (See the figure below)

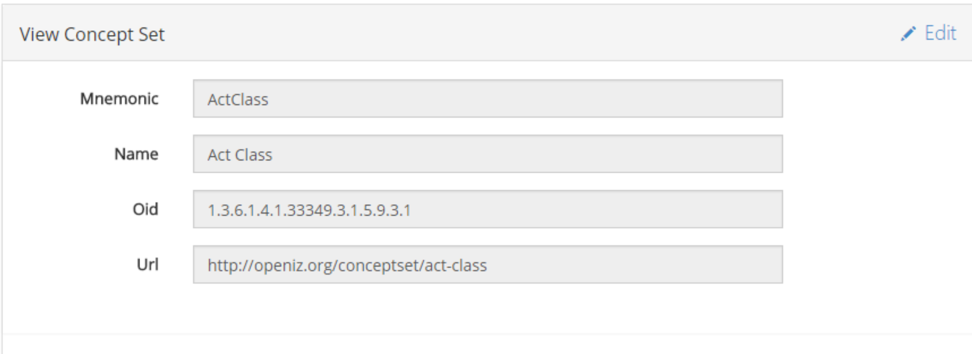


Figure 11.7 - View Concept Set area

11.4.2 Concepts Area

The **Concepts Set** area display a list of all concepts in the concept set. (See the figure below)

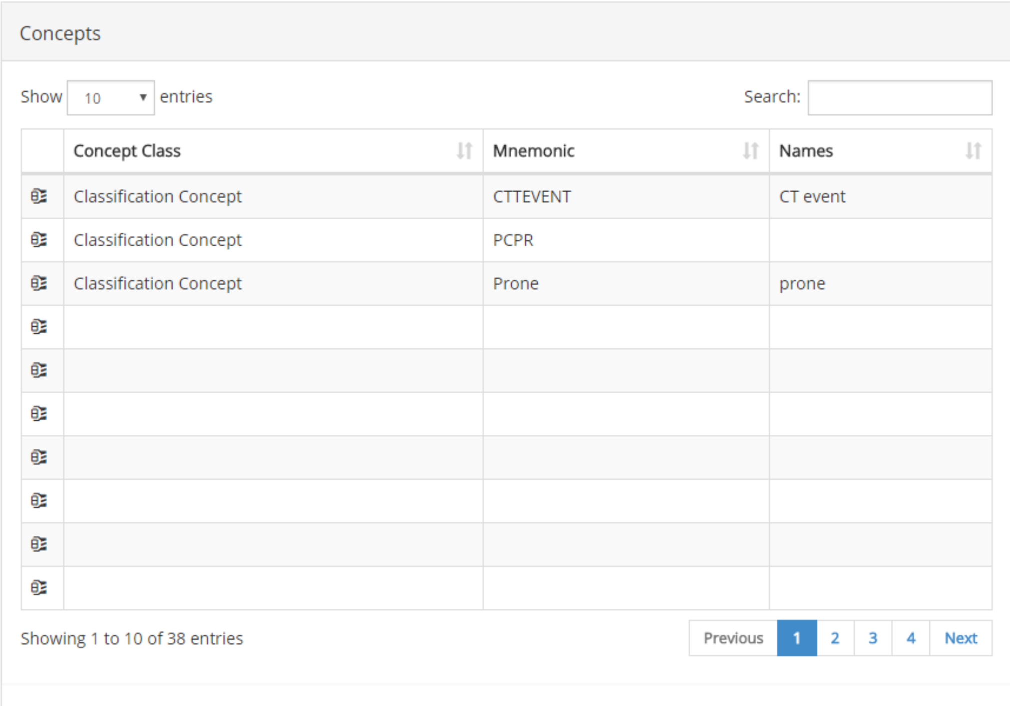


Figure 11.8 - View Concept Set area

11.5 Edit Concept Set

Each concept set has several components that can be edited.

To access the **Edit Concept Set** page from the **Concept Set** page:

Step 1: Find a concept set using the search bar and click the **Edit** button (See the figure below)

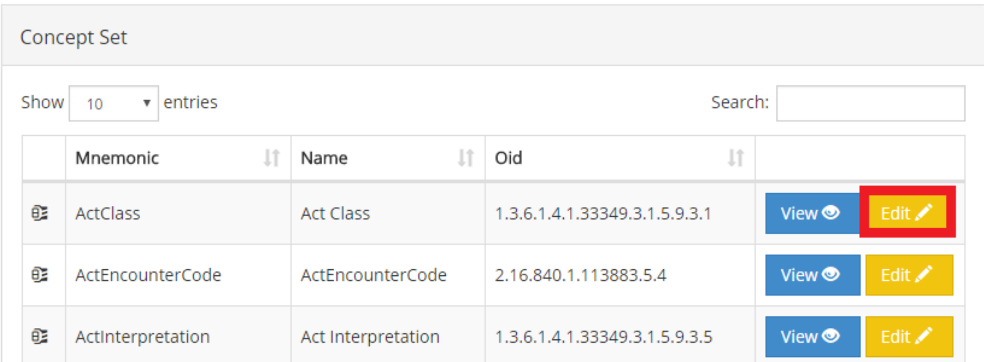


Figure 11.9 - Edit Concept Set from the Concept Sets page

To access the **Edit Concept Set** page from the **View Concept Set** page:

Step 1: Click the **Edit** button (See the figure below)

Figure 11.10 - Edit Concept Set from the View Concept Set page

You will be brought to **Edit Concept Set** page for the concept set you selected to edit. From this page you can modify fields.

11.5.1 Edit Concept Set Area

In this area you can change all the basic values set for the concept set you are viewing. *Required fields: Oid, Url.* (See the figure below)

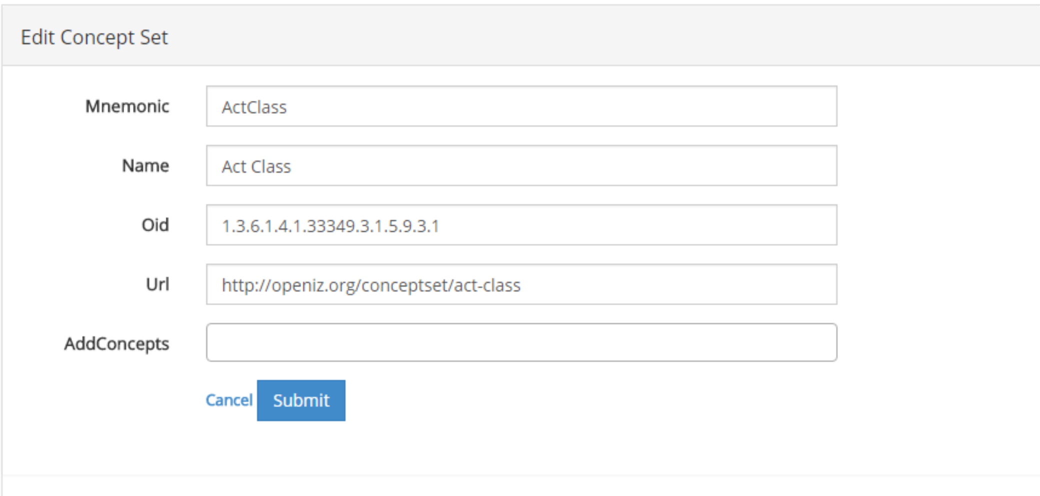
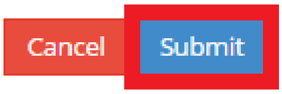


Figure 11.11 - Edit Concept Set

This section of the page allows you to add new concepts to the concept set. To add a new concept, see the section below. Otherwise, press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Concept Set** page.

Adding a New Concept

Step 1: From the **Edit Concept Set** page, in the **Edit Concept Set** area, start typing into the **Add Concepts** field (See the figure below)

Note: Enter 2 or more characters to search for a concept

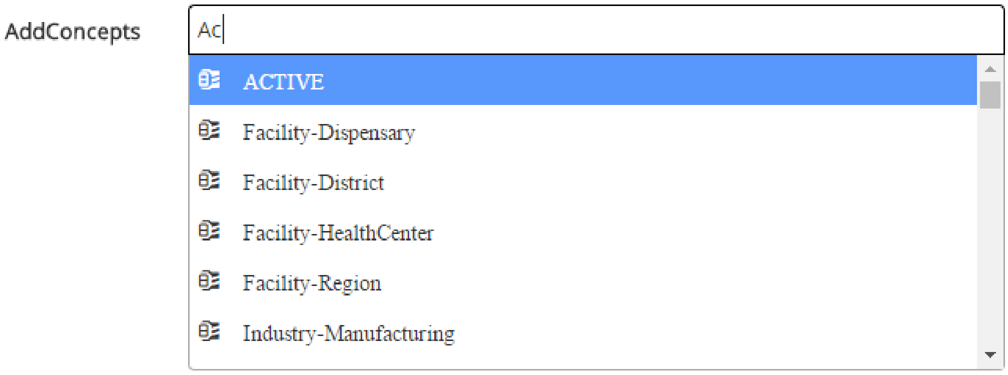
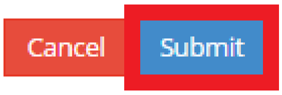


Figure 11.12 - Add Concepts field

You are able to add multiple concepts while editing the concept set, to add more repeat the last step by clicking an empty area on the **Add Concepts** field.

Step 2: Once you are satisfied with your changes, press the **Submit** button (See the figure below)



You will be returned to the **Edit Concept** page.

11.5.2 Concepts Area

The **Concepts** area displays a list of all concepts in the concept set. You are also able to view or delete existing concepts.

Viewing a Concept

You can view existing concepts using the **Edit Concept Set** page.

Step 1: From the **Edit Concept Set** page, in the **Concepts** area, click the **Edit** button next to the concept you wish to edit (See the figure below)

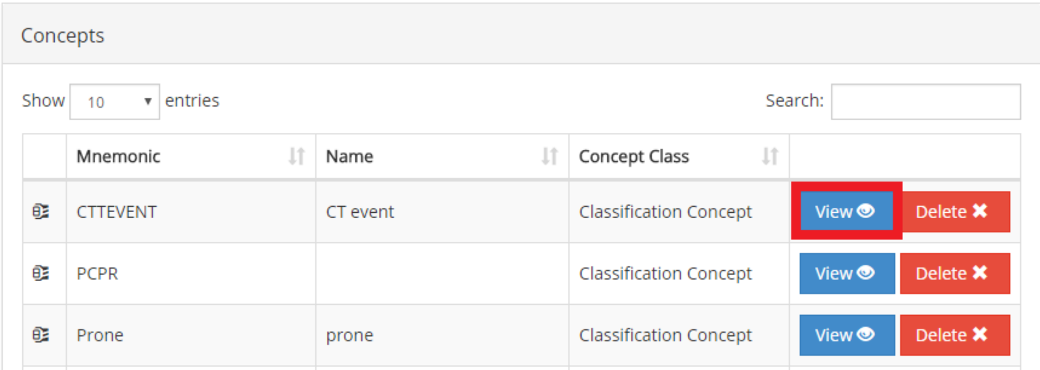


Figure 11.13 - View Concept button

You will be brought to the **View Concept** page. Here you can view details about the concept, but no changes can be made (See the figure below). To make changes to concepts, see the section above on **Concepts**.

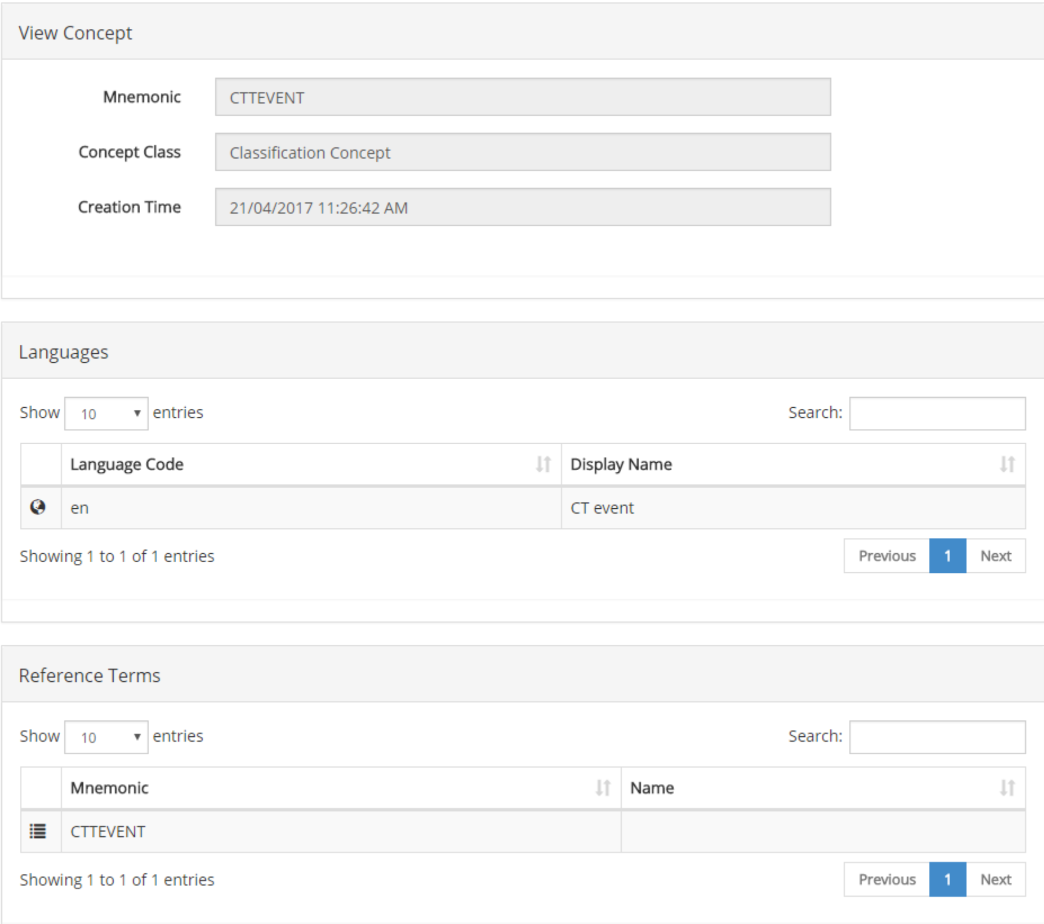


Figure 11.14 - View Concept page

Deleting a Concept

You can delete concepts using the **Edit Concept Sets** page.

Step 1: From the **Edit Concept Sets** page, in the **Concepts** area, click the **Delete ✖** button next to the concept you wish to delete (See the figure below)

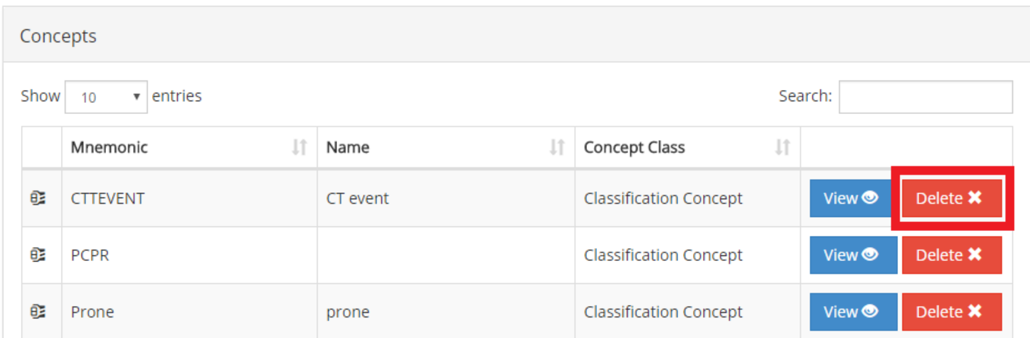


Figure 11.15 - Delete Concept button

The concept will be deleted and the **Edit Concept Set** page will be refreshed.

Chapter 12: Devices

The **Devices** page allows you to search for devices, and view or manage them. (See the figure below)

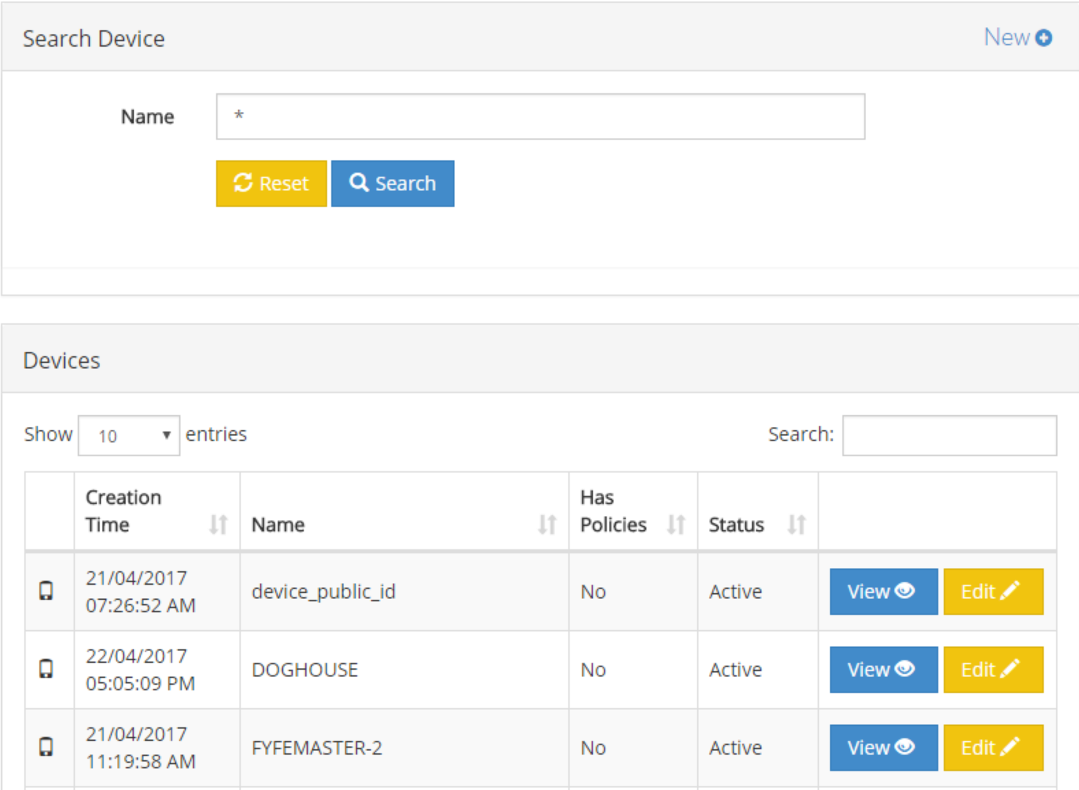


Figure 12.1 - Devices page

12.1 Search Devices

If you are looking for a specific device that already exists in the system you can use the **Search Device** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Device** area, enter the name of a device (See the figure below)

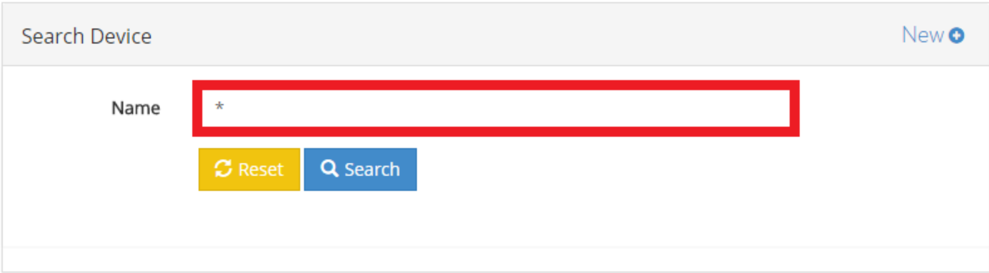
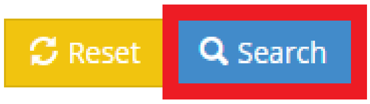


Figure 12.2 - Searching for a Device

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Devices** area below. See the following section on **Devices** for more information.

12.2 Devices

The **Devices** area of the **Devices** page displays a list of all the devices in the search results. By default the search results load with all devices available. (See the figure below)

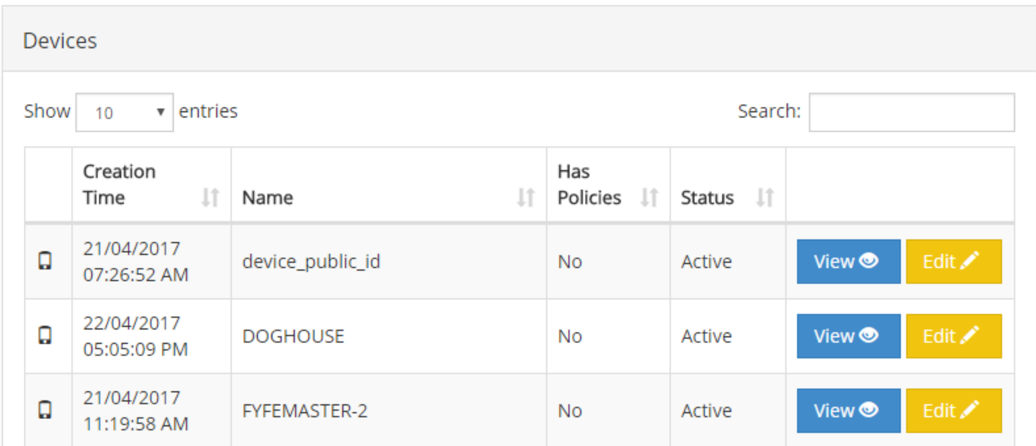


Figure 12.3 - Devices

Devices displayed here list details including the creation time, device name, policy status and active status. Devices can be viewed and managed from this page.

New devices can also be added from this page. To add a new device, or view and manage an existing device, see sections below.

12.3 New Device ⊕

When a new device is required, you can create a new device. To create a new device:

Step 1: From the **Devices** page, click the **New** ⊕ button in the top right of the **Search Device** area (See the figure below)

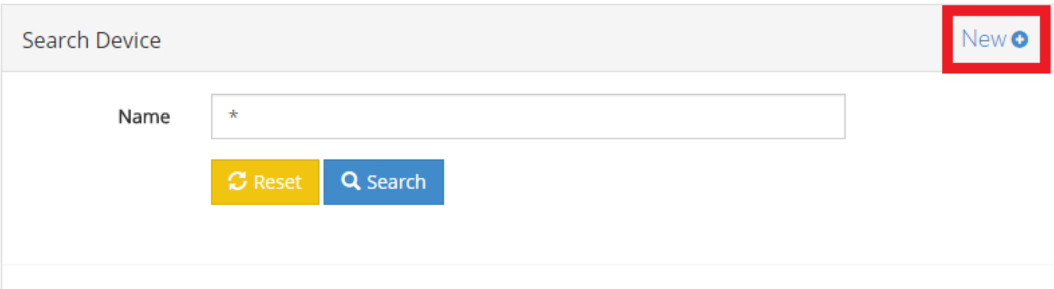


Figure 12.4 - New device button

Step 2: Enter the fields for the device you are adding (See the figure below):

- Name (Required)
- Device Secret (Required)

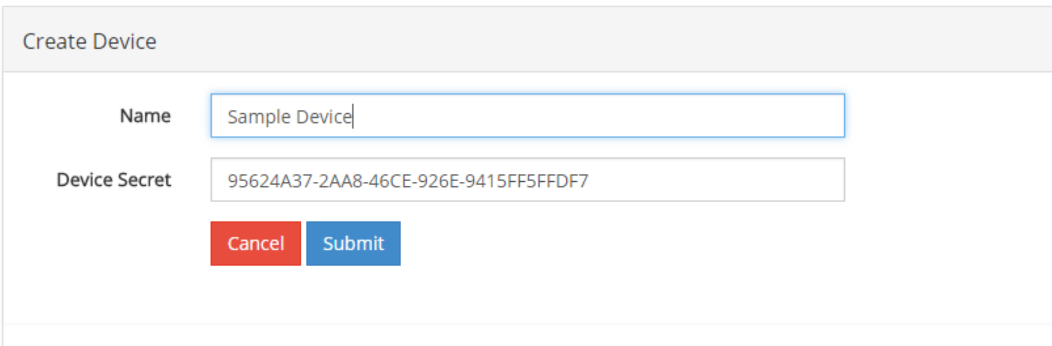
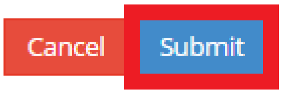


Figure 12.5 - Create Device page

Step 3: Press the **Submit** button to create the device (See the figure below)



If created successfully you should see a popup display message saying the *Device created successfully*. From here you will see the **View Device** page. See below for more details on viewing and editing devices.

12.4 View Devices

After finding a device in the search results, or creating a new device you can view the devices details.

Step 1: From the **Devices** page, find a device you would like to view and press the **View** button (See the figure below)

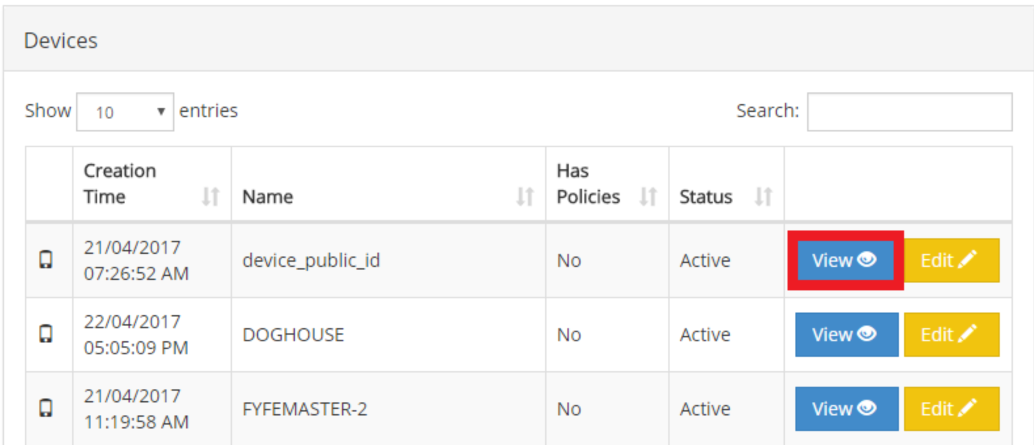


Figure 12.6 - View Device button

You will be brought to **View Device** page for the device you selected to view.

12.4.1 View Device Area

The **View Device** area displays the initial information for the device that was created. The name for the device is displayed in this area. (See the figure below)

Figure 12.7 - View Device area

12.4.2 Policies Area

The **Policies** area displays a list of policies for the device being viewed. (See the figure below)

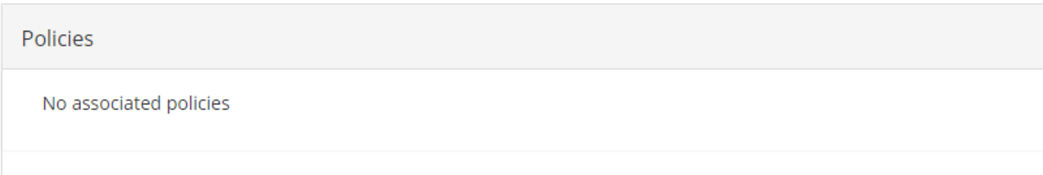


Figure 12.8 - Policies area

12.5 Edit Devices

Each device has a couple components that can be edited.

To access the **Edit Device** page from the **Device** page:

Step 1: Find a device using the search bar and click the **Edit** button (See the figure below)

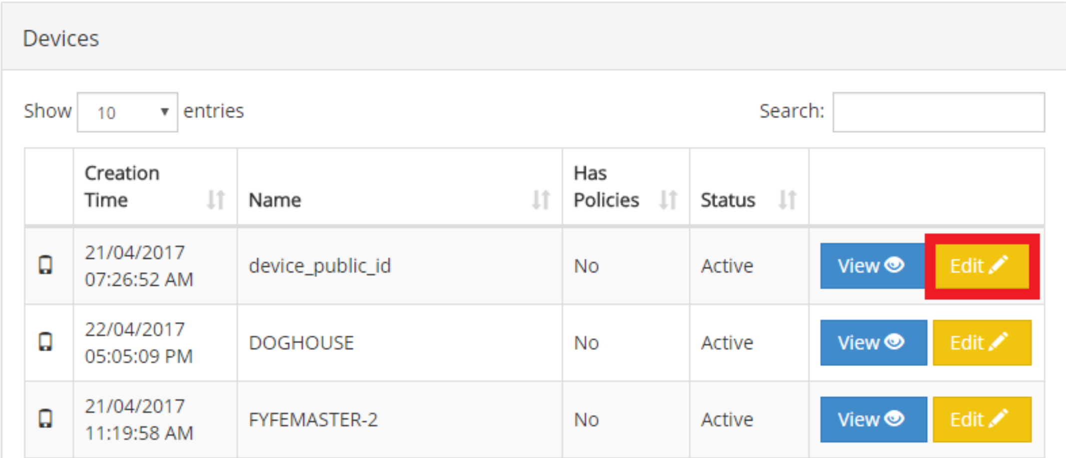


Figure 12.9 - Edit Device from the Devices page

To access the **Edit Device** page from the **View Device** page:

Step 1: Click the **Edit** button (See the figure below)

Figure 12.10 - Edit Device from the View Device page

You will be brought to **Edit Device** page for the device you selected to edit. From this page you can modify fields.

12.5.1 Edit Device Area

In this area you can change the name and policies for the device you are viewing. *Required fields: Name.* (See the figure below)

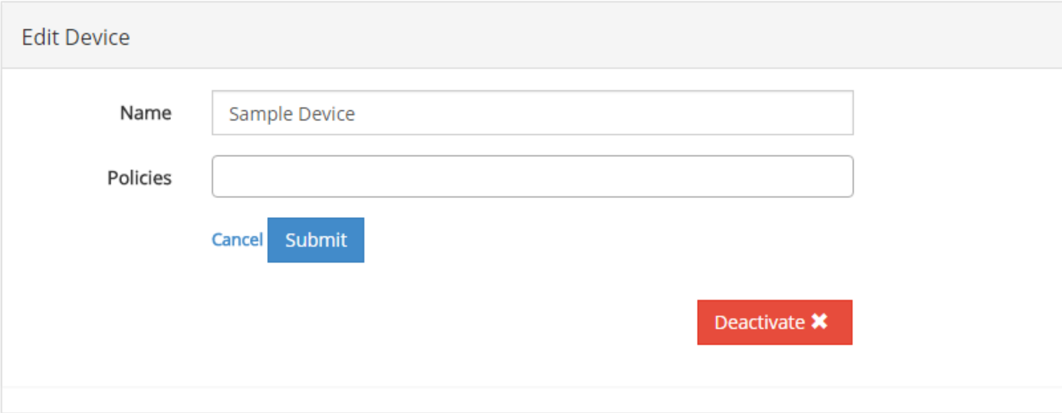
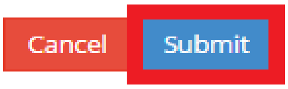


Figure 12.11 - Edit Device

Press the **Submit** button after making any changes. (See the figure below)



You will be brought back to the **View Device** page.

Deactivating a Device ✖

In this area you can deactivate the device. Once deactivated the device cannot be modified or used anywhere in the system until reactivated. To deactivate a device:

Step 1: From the **Edit Device** page, click the red **Deactivate ✖** button in the **Edit Device** area (See the figure below)

You will see a message popup stating *Device successfully deactivated* and you will be returned to the **Search & View Devices** page.

Activating a Device

If a device has been deactivated it can be reactivated in the **Edit Device** page. Once activated the device can again be modified or used in the system until deactivated. To activate a device:

Step 1: From the **Edit Device** page, click the green **Activate** button in the **Edit Device** area (See the figure below)

You will see a message popup stating *Device successfully activated* and you will be returned to the **Search & View Devices** page.

Adding Policies

You are able to modify available policies in the **Edit Device** area of the **Edit Device** page. You can add multiple policies to a device to give that device more functionality throughout the system. To add a policy to a device:

Step 1: Click on an empty part of the **Policies** field (See the figure below)

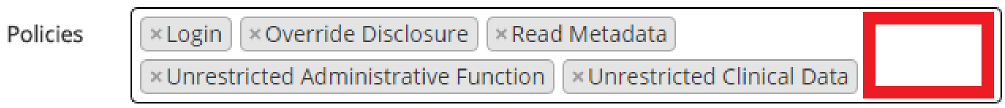


Figure 12.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy (See the figure below)

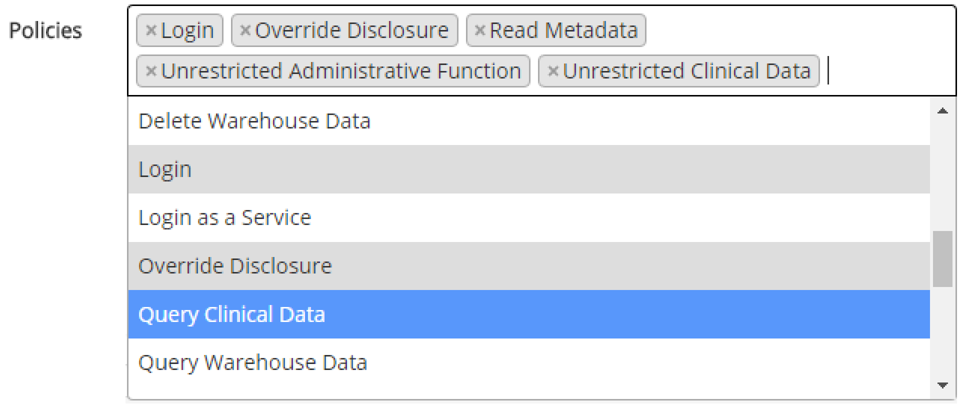
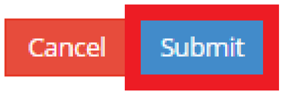


Figure 12.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Device** page. The **Policies** area will be updated with the changes in policies for that device.

Removing Policies

You are able to modify available policies in the **Edit Device** area of the **Edit Device** page. You can restrict access for specific devices by removing some policies that exist for that device. To remove a policy from a device:

Step 1: Click on the ✖ next to the name of a policy in the **Policies** field that you want to remove (See the figure below)

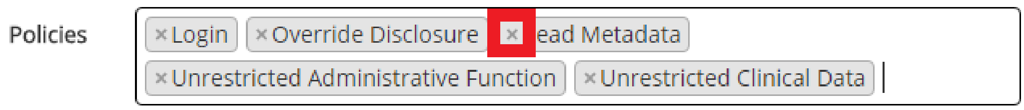
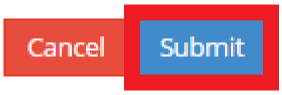


Figure 12.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

Step 3: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Device** page The **Policies** area will be updated with the changes in policies for that device.

12.5.2 Policies Area

The **Policies** area displays a list of **Policies** related to the device you are editing. The creation time, name, grant status, public status, oid (object identifier) and active status are all shown for each policy listed. If the policy list is very large there is a search bar that allows you to filter results. (See the figure below)

Policies

	Creation Time	Name	Grant	Is Public	Oid	Status
	21/04/2017 07:26:28 AM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	21/04/2017 07:26:28 AM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	21/04/2017 07:26:28 AM	Read Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4.0	Active
	21/04/2017 07:26:28 AM	Unrestricted Administrative Function	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	21/04/2017 07:26:28 AM	Unrestricted Clinical Data	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active

Figure 12.15 - Policies area

Chapter 13: Extension Types

The **Extension Types** page displays a list the current extension types installed on the system and shows the name and handler class for the extension type. (See the figure below)

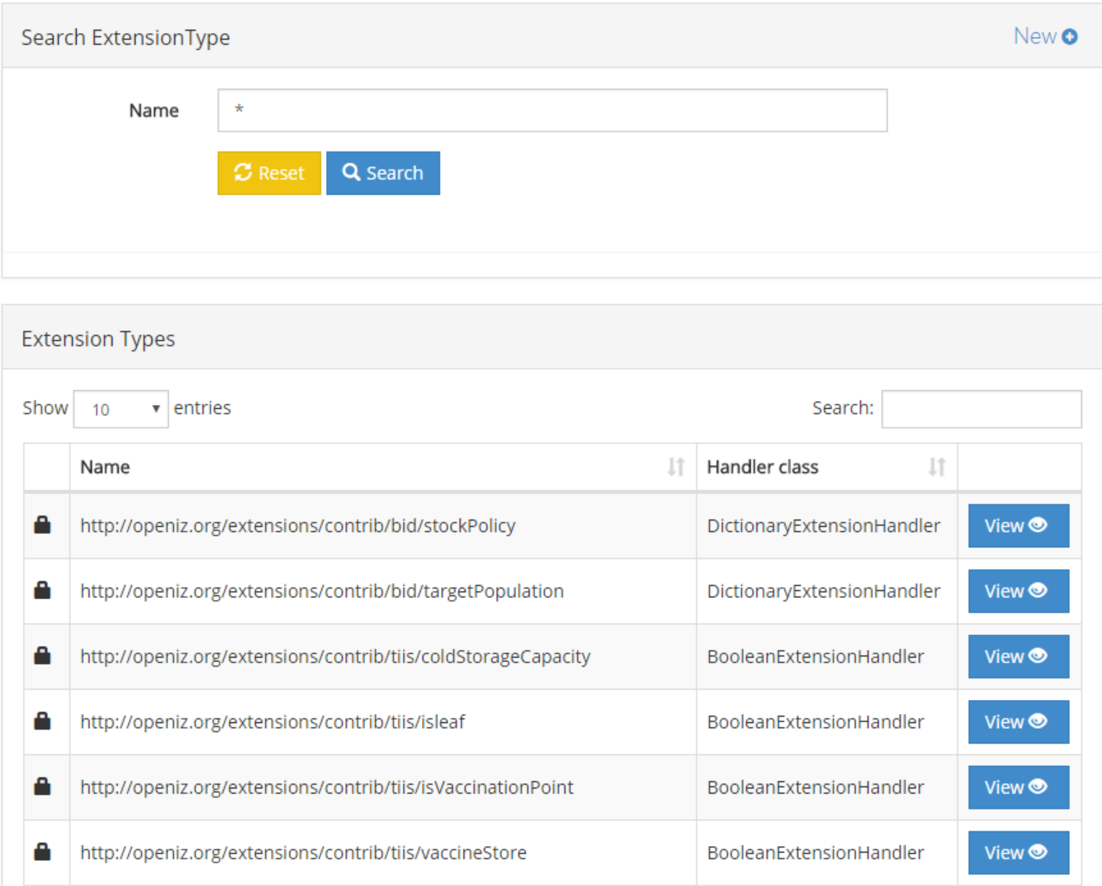


Figure 13.1 - Extension Types page

You can add new extension types or view ones current installed extension types.

13.1 Search Extension Types

If you are looking for a specific extension type that already exists in the system you can use the **Search Extension Type** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Extension Type** area, enter the name of an extension type you are looking for and click the **Search** button (See the figure below)

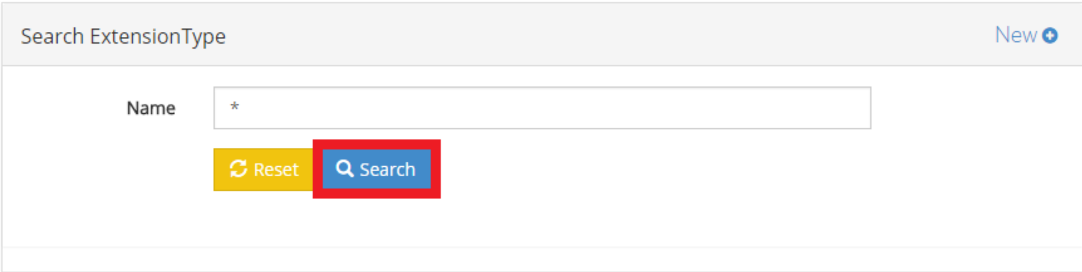


Figure 13.1 - Searching for an Extension Type

Search results will appear in the **Extension Types** area below. See the following section on **Extension Types** for more information.

13.1 New Extension Types

From here you can upload new extension types to distribute them to the TImR system. To add a new extension type:

Step 1: Click the **New** button in the top right of the **Extension Types** area (See the figure below)

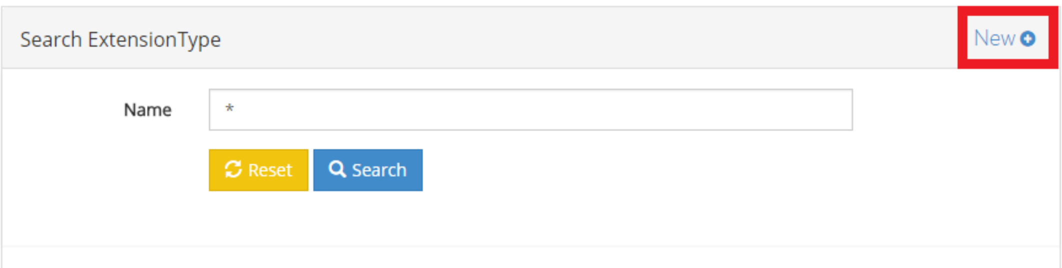


Figure 13.3 - Creating a new extension type

Step 2: You will be brought to the **Create extension type** page

Step 3: Fill in the form (See the figure below):

- Name (Required)
- Handler class (Required)

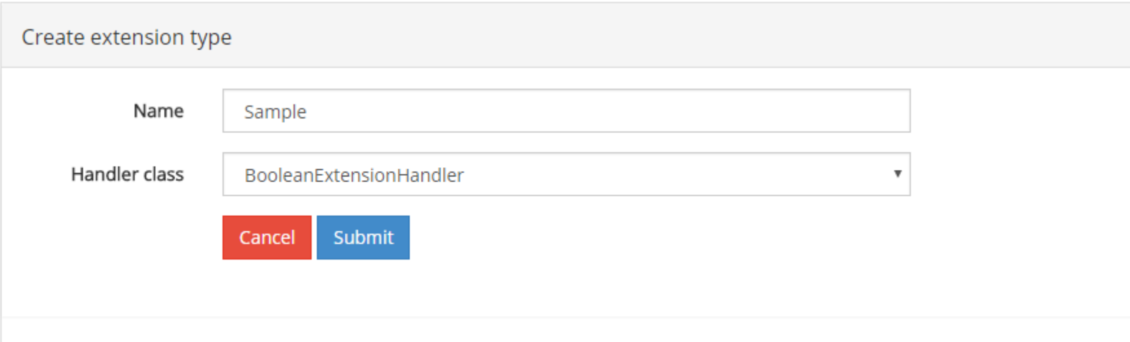
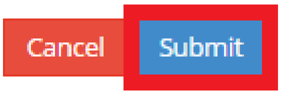


Figure 13.4 – Creating a new extension type

Step 4: Click the **Submit** button to upload the extension type (See the figure below)



13.2 View Extension Types

You are able to view details about the extension types that are currently installed. To view extension type details:

Step 1: From the **Extension Types** page, click the **View** button next to the extension type you wish to view (See the figure below)

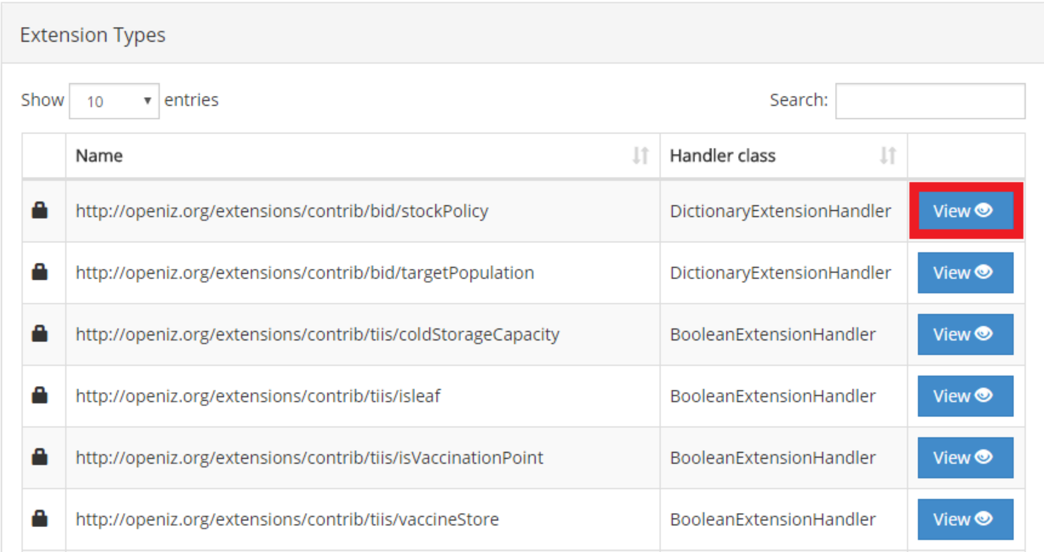


Figure 13.5 - View an extension type button

You will be brought to the **View Extension** page. You can see the extension type name and handler class. (See the figure below)

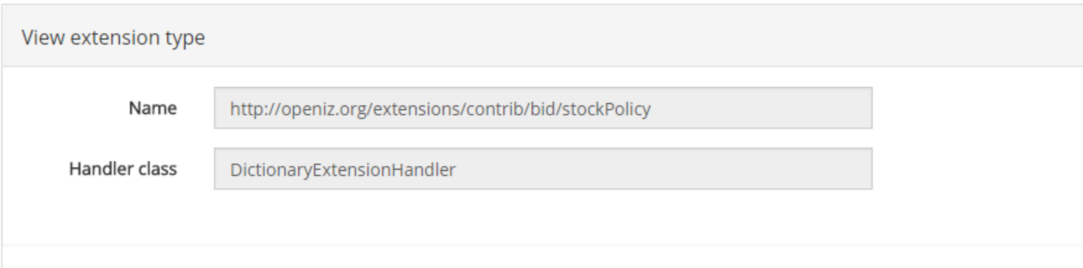


Figure 13.6 - Viewing an extension type

Chapter 14: Manuals

The **Manuals** page displays a list of the manuals that are currently available. (See the figure below)

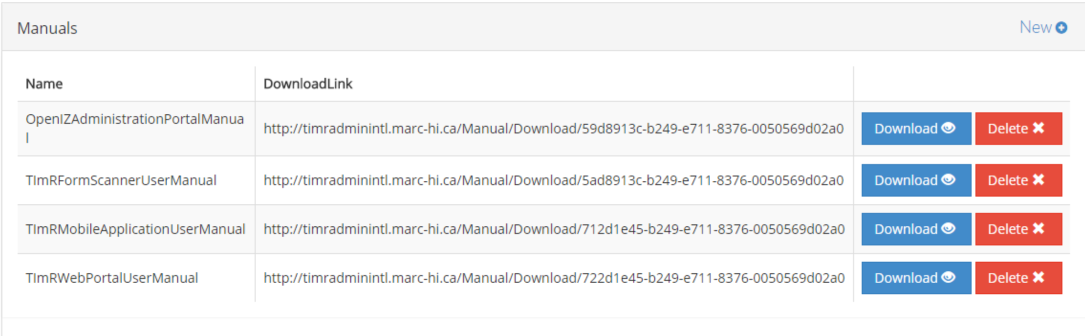


Figure 14.1 - Manuals page

You can add new manuals or download manuals.

14.1 New Manuals

From here you can upload new manuals to distribute them to the TImR system.

To add a new manual:

Step 1: Click the **New** button in the top right of the **Manuals** area (See the figure below)

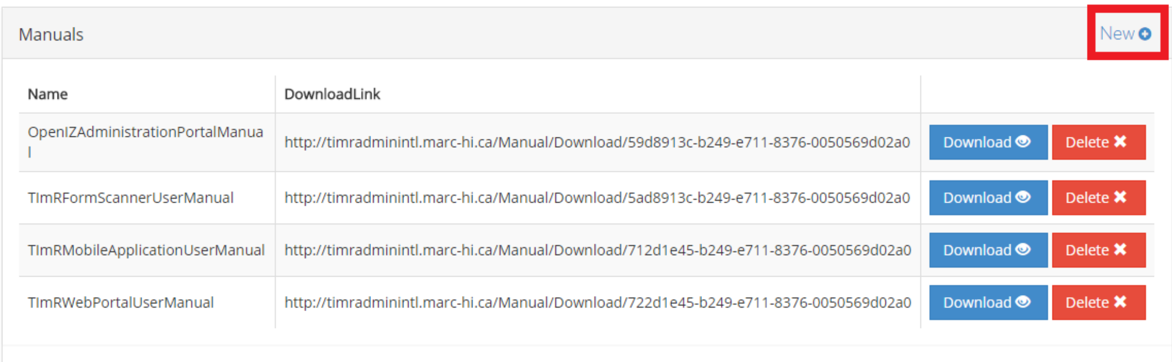


Figure 14.2 - Creating a new manual

Step 2: You will be brought to the **Upload Manual** page, Click the **Choose File** button (See the figure below)

Note: Manual files must be in **.pdf** format

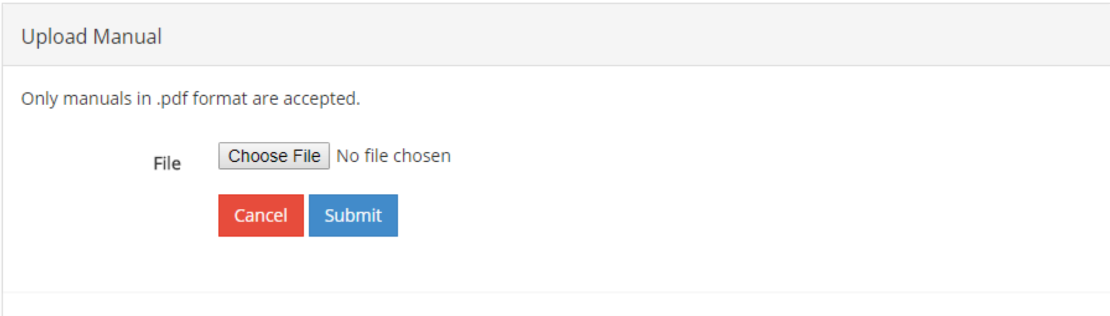


Figure 14.3 - Uploading a new manual

Step 3: In the File Explorer pop-up box, browse to the manual file you wish to add. Select the manual file and click the **Open** button (See the figure below)

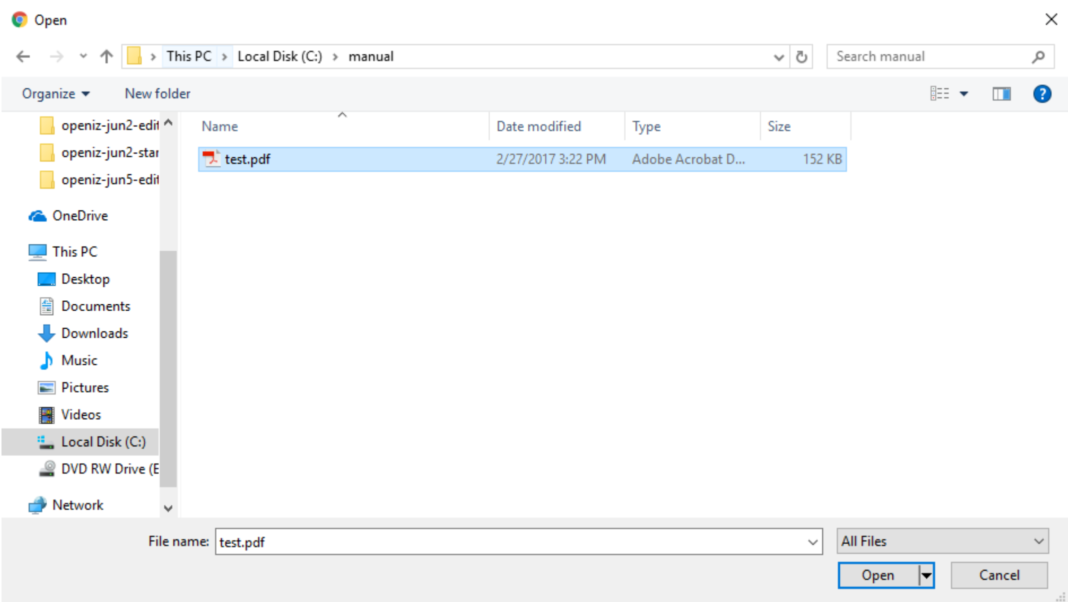
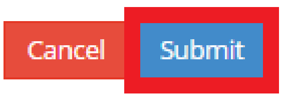


Figure 14.4 – Browsing for the manual file

Step 4: Click the **Submit** button to upload the manual (See the figure below)



14.2 Downloading Manuals ⦿

You can download a local copy of an available manual to view:

Step 1: From the **Manuals** page, click the **Download** ⦿ button next to the manual you wish to download (See the figure below)

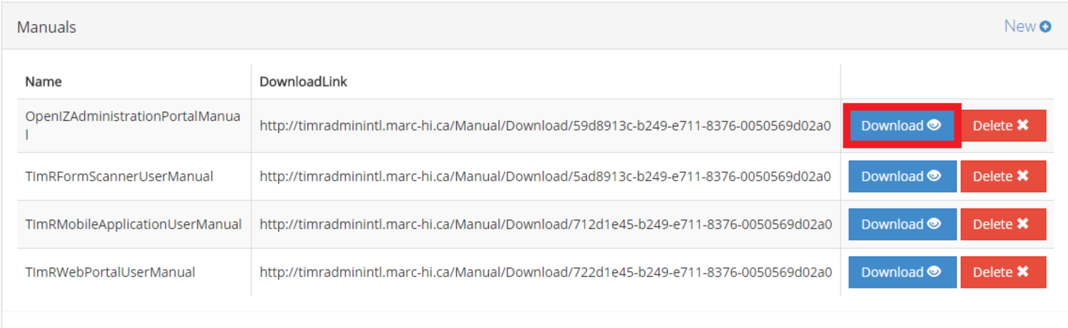


Figure 14.5 - Downloading manuals – Download button

The manual will be automatically downloaded to your local machine. Unless otherwise specified, the file will likely be in your Downloads folder.

14.3 Deleting Manuals ✖

You can delete a submitted manual to remove it from TImR. To delete a manual:

Step 1: Click the **Delete** ✖ button next to the manual you wish to delete (See the figure below)

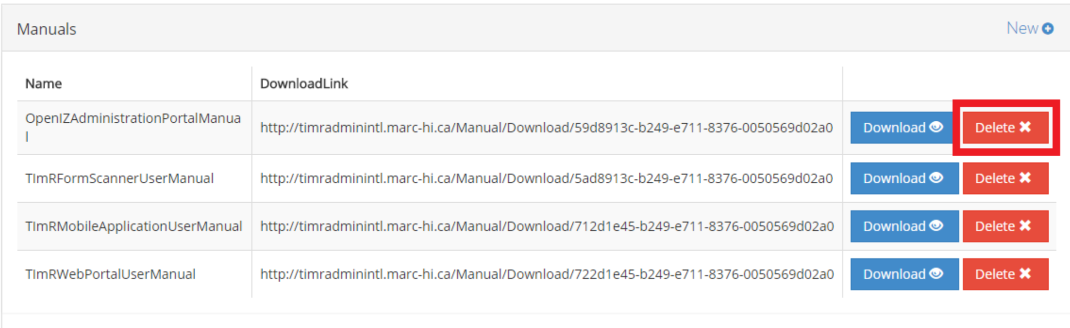


Figure 14.6 – Deleting a manual

You will see a success message displayed stating *Manual deleted successfully*. The manual will be removed from the TImR system.

Chapter 15: Materials

The **Materials** page allows you to search for materials, or manually manage materials and relationships.

15.1 Search Material

If you are looking for a specific material that already exists in the system you can use the **Search Material** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Material** area, enter the name of a material (See the figure below)

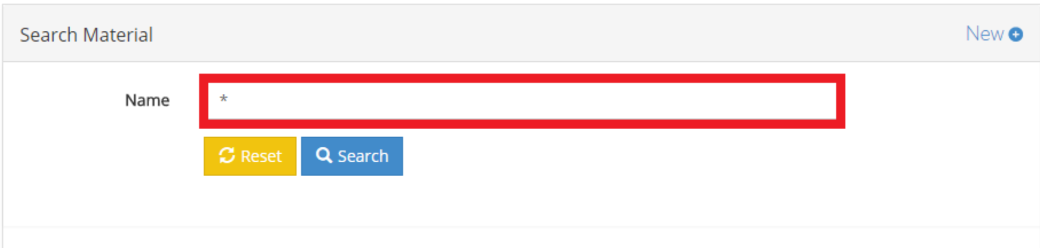
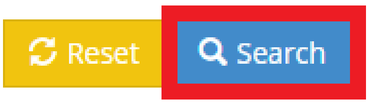


Figure 15.1 - Searching for a Material

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Materials** area below (See the figure below). See the following section on **Materials** for more information.

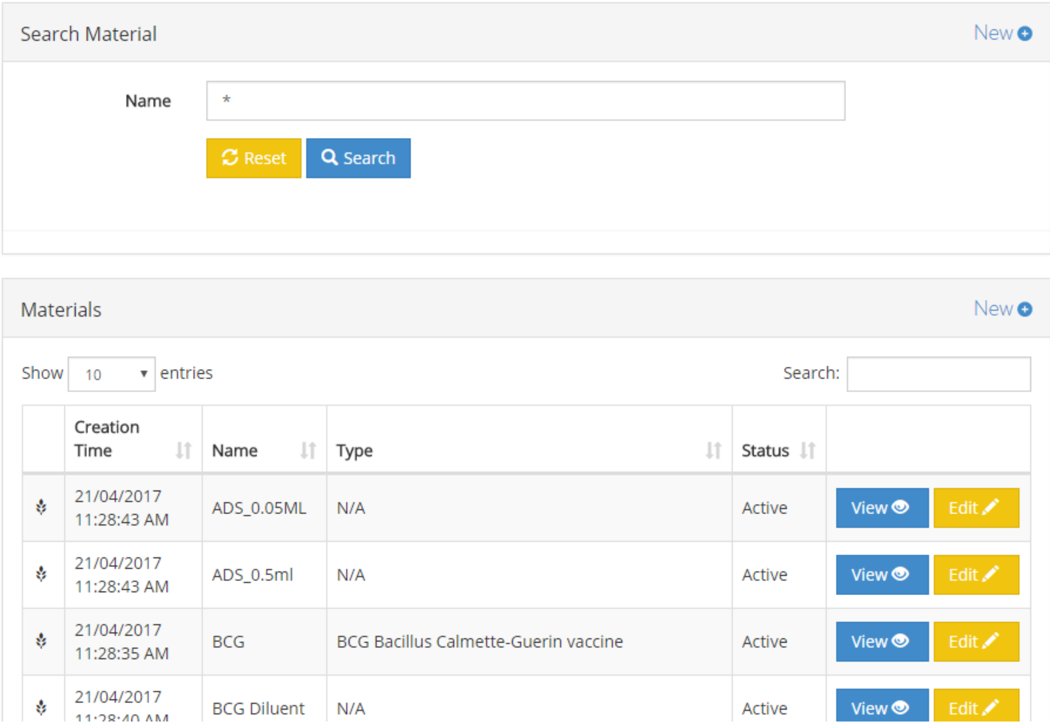
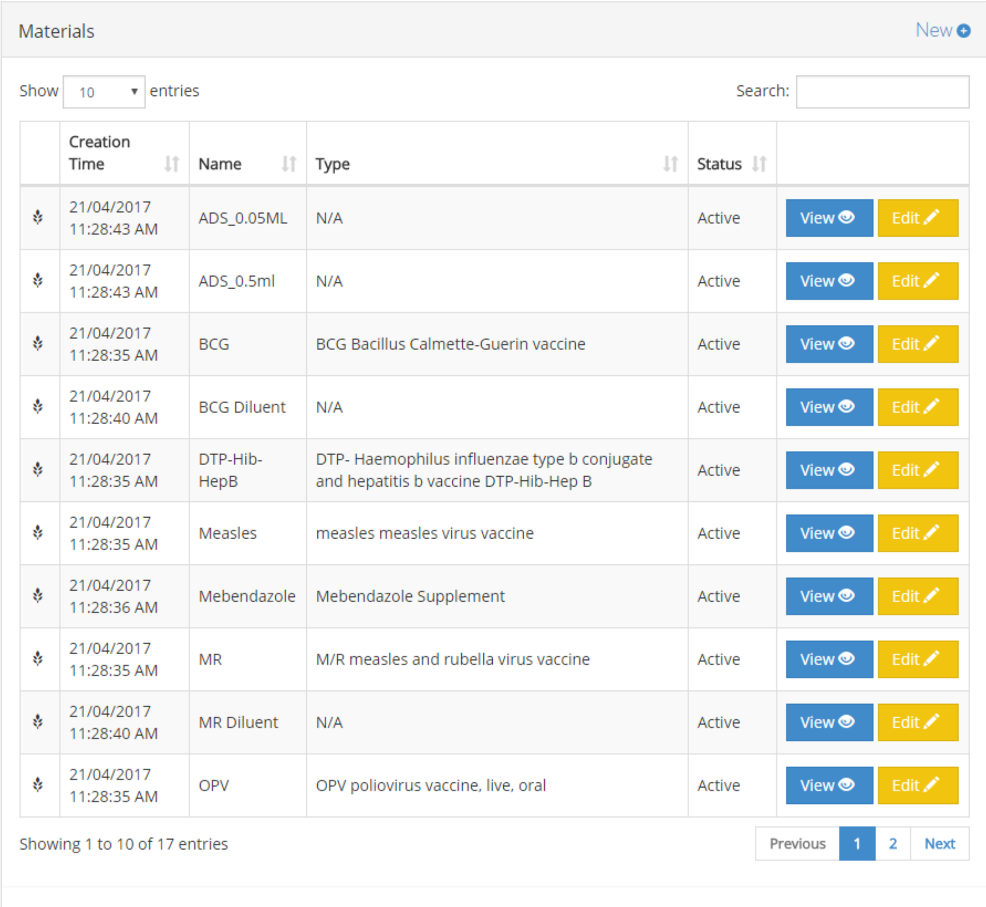


Figure 15.2 - Materials page

15.2 Materials

The **Materials** area of the **Materials** page displays a list of all the materials in the search results. By default the search results load with all types of materials available.

Materials displayed here list details such as the creation time, name, type and active status. Materials can be viewed and managed from this page. (See the figure below)



Materials New

Show 10 entries Search:

	Creation Time	Name	Type	Status	
	21/04/2017 11:28:43 AM	ADS_0.05ML	N/A	Active	View Edit
	21/04/2017 11:28:43 AM	ADS_0.5ml	N/A	Active	View Edit
	21/04/2017 11:28:35 AM	BCG	BCG Bacillus Calmette-Guerin vaccine	Active	View Edit
	21/04/2017 11:28:40 AM	BCG Diluent	N/A	Active	View Edit
	21/04/2017 11:28:35 AM	DTP-Hib-HepB	DTP- Haemophilus influenzae type b conjugate and hepatitis b vaccine DTP-Hib-Hep B	Active	View Edit
	21/04/2017 11:28:35 AM	Measles	measles measles virus vaccine	Active	View Edit
	21/04/2017 11:28:36 AM	Mebendazole	Mebendazole Supplement	Active	View Edit
	21/04/2017 11:28:35 AM	MR	M/R measles and rubella virus vaccine	Active	View Edit
	21/04/2017 11:28:40 AM	MR Diluent	N/A	Active	View Edit
	21/04/2017 11:28:35 AM	OPV	OPV poliovirus vaccine, live, oral	Active	View Edit

Showing 1 to 10 of 17 entries Previous 1 2 Next

Figure 15.3 - Materials

New materials can also be added from this page. To add a new material, or view or manage an existing material, see sections below.

15.3 New Material

When a new material has been acquired, you can create a new material in order to have it become available throughout the system.

To create a new material:

Step 1: From the **Materials** page, click the **New** button in the top right of the **Search Material** area, or click the **New** button in the top right of the **Materials** area (See the figure below)

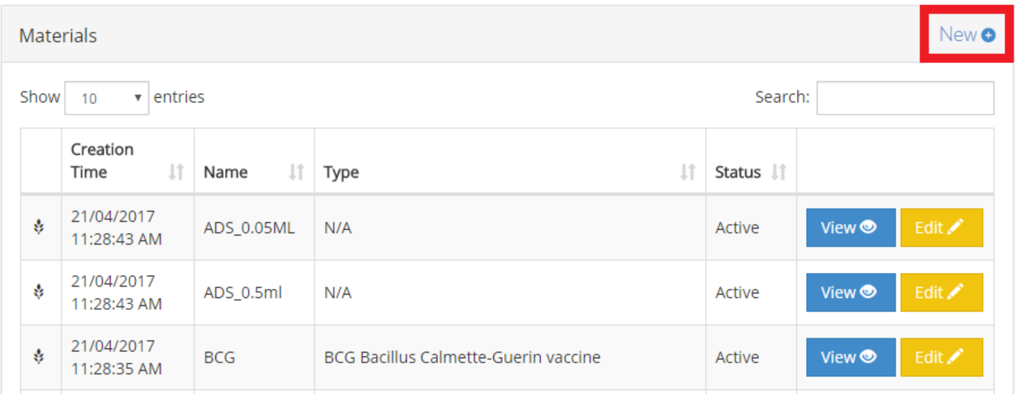


Figure 15.4 - New Material button

Step 2: You will be brought to the **Create Material** page, Fill in the fields for the material you are adding (See the figure below):

- Name (Required)
- Form Concept

  Note: This refers to the way this material is administered

- Quantity Concept

  Note: Measurement type for this material

- Type Concept

  Note: The material type

- Expiry date

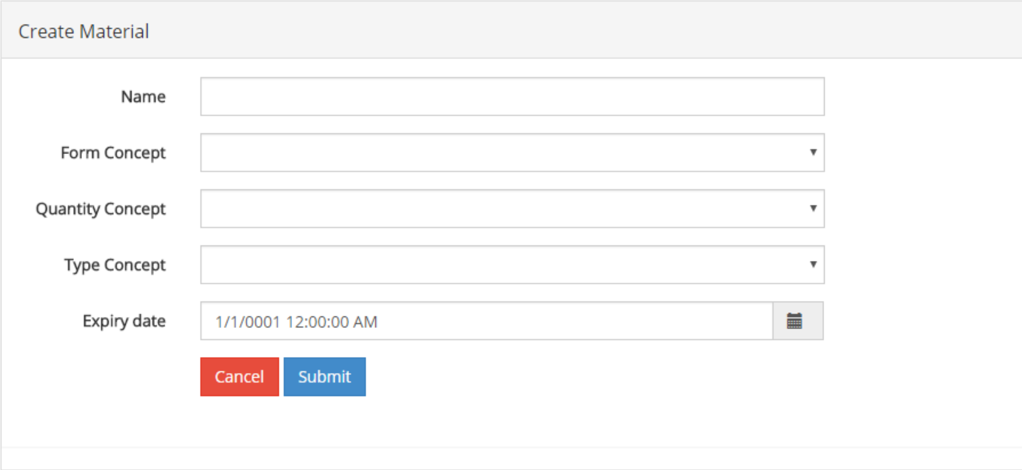
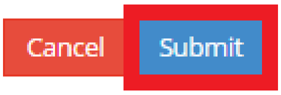


Figure 15.5 - Create Material page

Step 3: Press the **Submit** button to create the material (See the figure below)



If created successfully you should see a popup display message saying the *Material created successfully*. From here you will see the **View Material** page. See below for more details on viewing and editing materials.

15.4 View Material

After finding a material in the search results, or creating a new material you can view the materials details.

Step 1: From the **Materials** page, find a material you would like to view and press the **View** button (See the figure below)

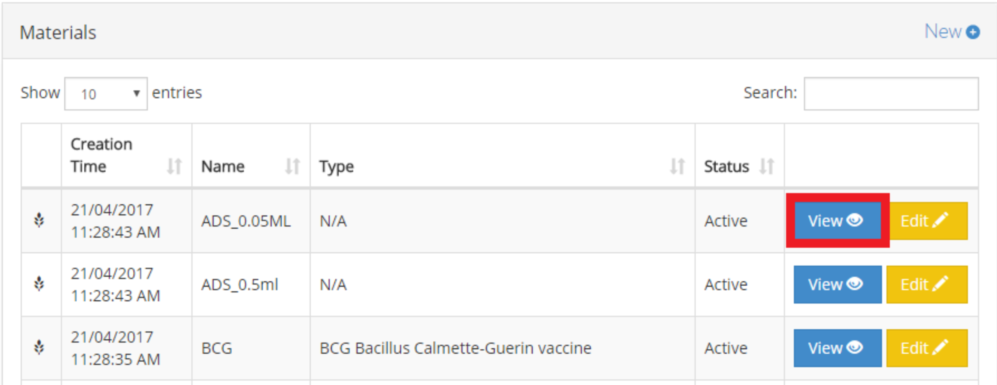


Figure 15.6 - View Material button

You will be brought to **View Material** page for the material you selected to view. (See the figure below)

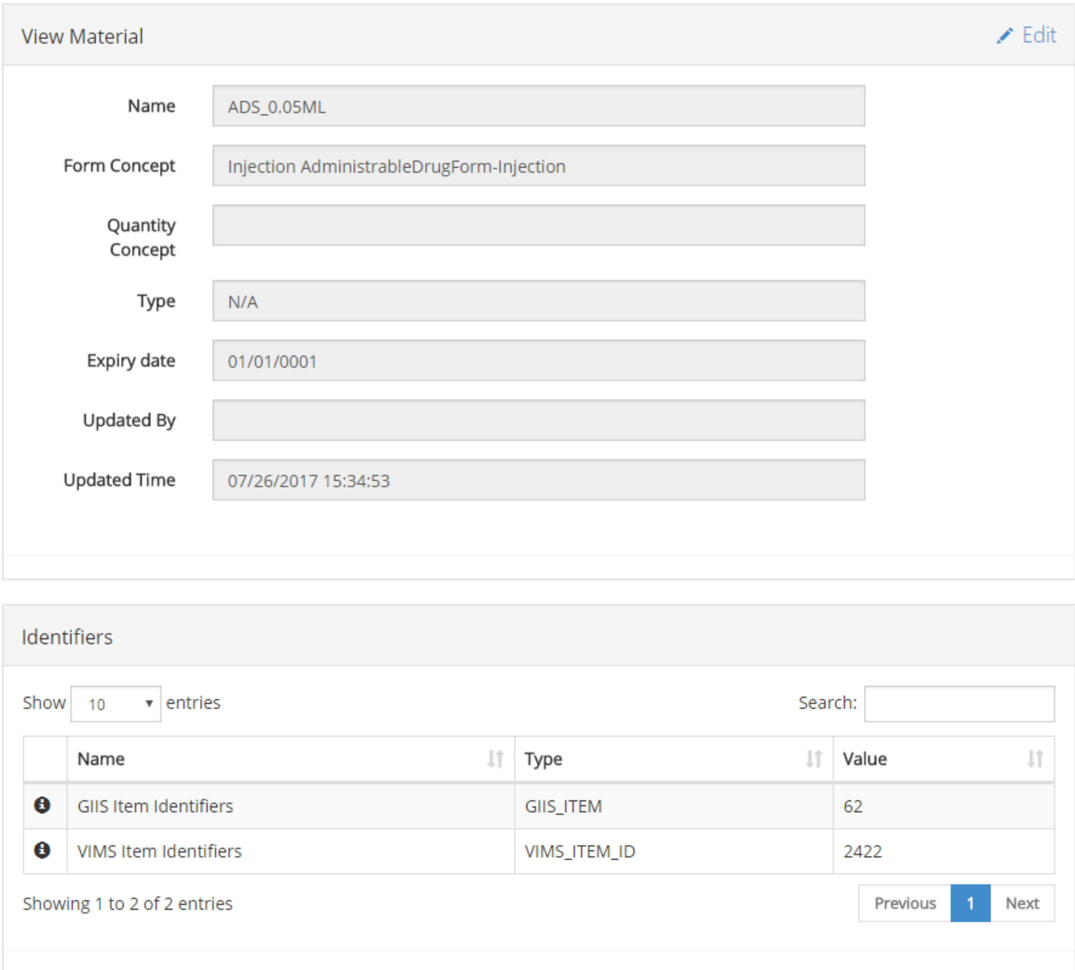


Figure 15.7 - View Material page

15.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the material. If the material has not yet been verified, you will see the **Record Verification Required** area appear above the **View Material** area on the **View Material** page. (See the figure below)

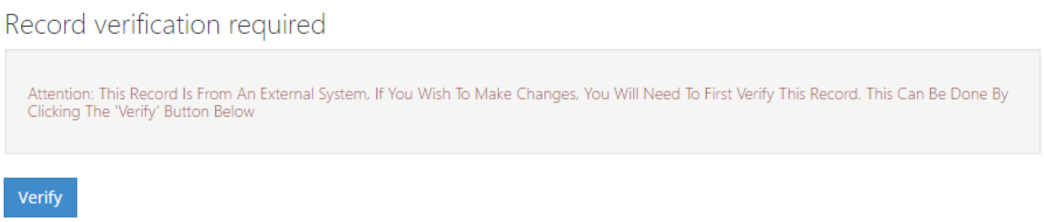


Figure 15.8 - Record Verification Required alert

If you want to verify this material:

Step 1: Look through the material information, identifiers and relationships for the material you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

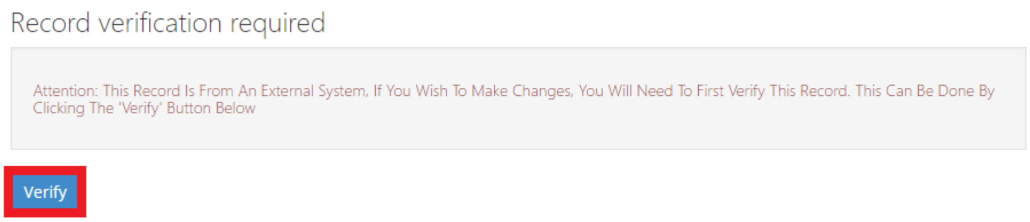


Figure 15.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and returned to the **View Material** page for the material you are currently viewing.

15.4.2 View Material Area

The **View Material** area displays the initial information for the material that was created. Details such as the materials name, form concept, quantity concept, type concept, expiry date and update information are all displayed in this area. (See the figure below)

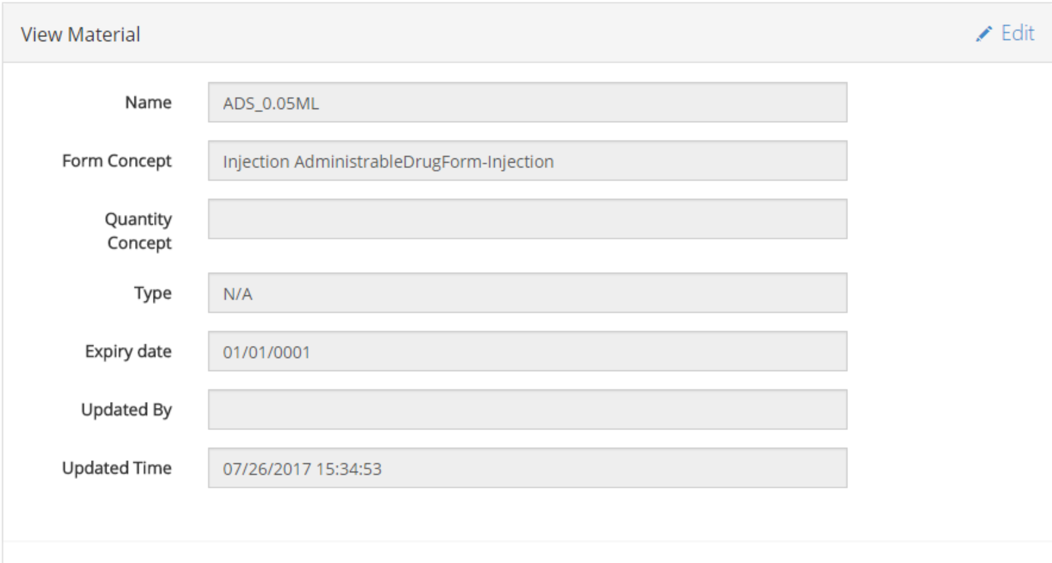


Figure 15.10 - View Material area

15.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the material. (See the figure below)

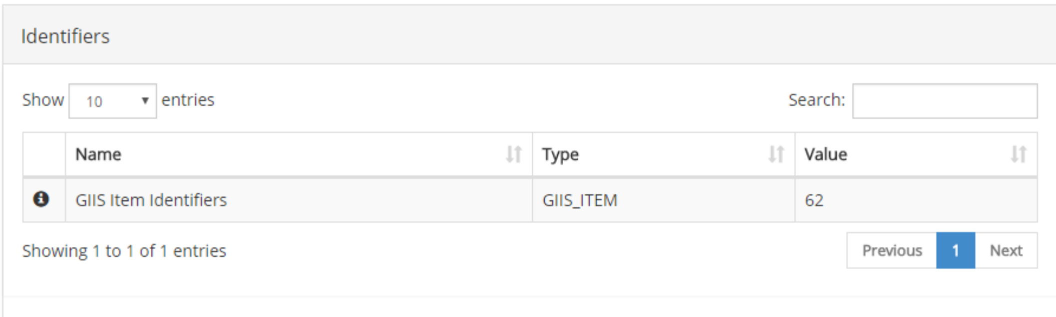


Figure 15.11 - Identifiers area

15.4.4 Relationships

The **Relationships** area displays a list of relationships between manufactured materials and the concept of the materials. Also displayed here are relationship details such as the name, relationship type, type and quantity. (See the figure below)

Relationships

Show 10 entries

Search:

	Name	Relationship type	Type	Quantity
	ADS_0.05ML (BD)	manufactured product	N/A	0
	ADS_0.05ML (BD)	manufactured product	N/A	0
	ADS_0.05ML (BD)	manufactured product	N/A	0
	ADS_0.05ML (BD)	manufactured product	N/A	0
	ADS_0.05ML (BD)	manufactured product	N/A	0
	ADS_0.05ML (Bharat Biotech International Ltd)	manufactured product	N/A	0
	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0
	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0
	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0
	ADS_0.05ML (GlaxoSmithKline)	manufactured product	N/A	0

Showing 1 to 10 of 11 entries

Previous 1 2 Next

Figure 15.12 - Relationships area

15.5 Edit Material

Each material has several components that can be edited. You can change the initial details, add or change identifiers, and add or change relationships.

To access the **Edit Material** page from the **Materials** page:

Step 1: Find a material using the search bar and click the **Edit** button (See the figure below)

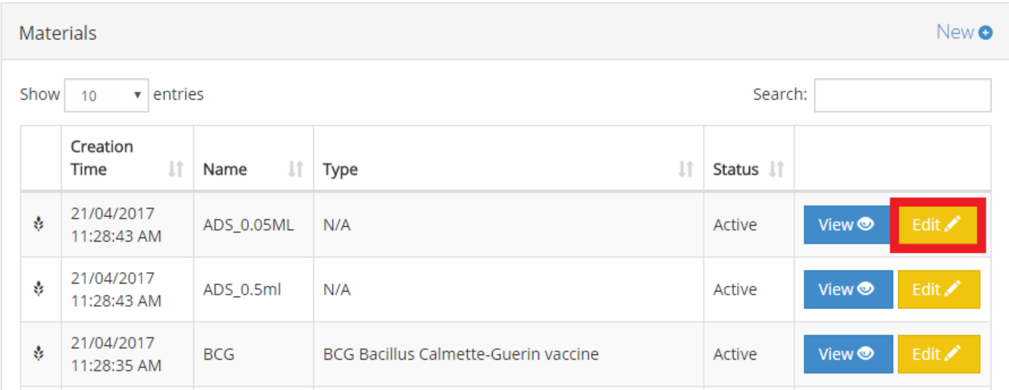


Figure 15.13 - Edit Material from the Materials page

To access the **Edit Material** page from the **View Material** page:

Step 1: Click the **Edit** ✎ button (See the figure below)

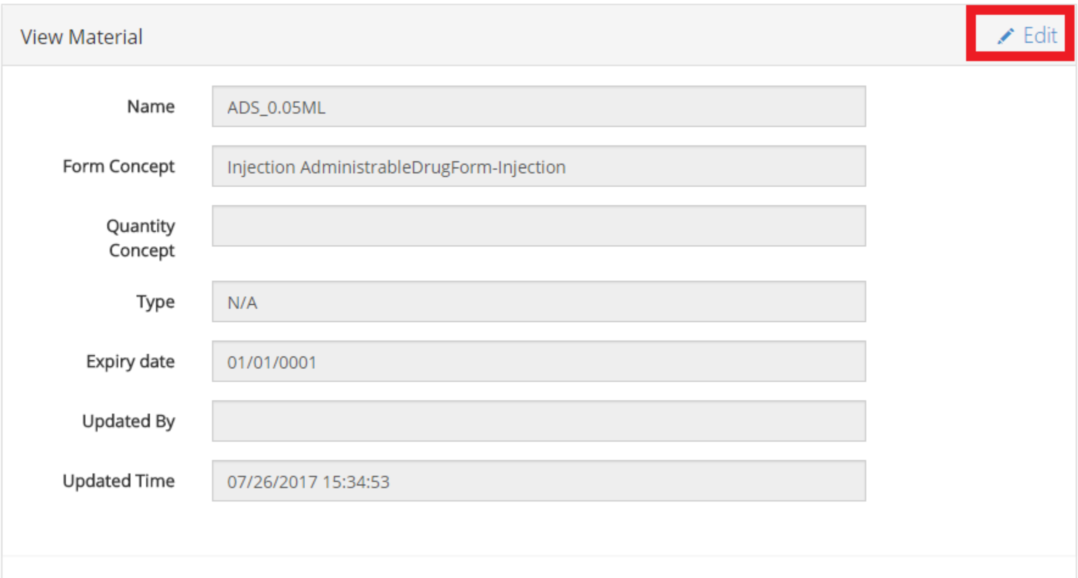


Figure 15.14 - Edit Material from the View Material page

You will be brought to **Edit Material** page for the material you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

15.5.1 Edit Material Area

In this area you can change all the basic values set for the material concept you are viewing. *Required fields: Name.* (See the figure below)

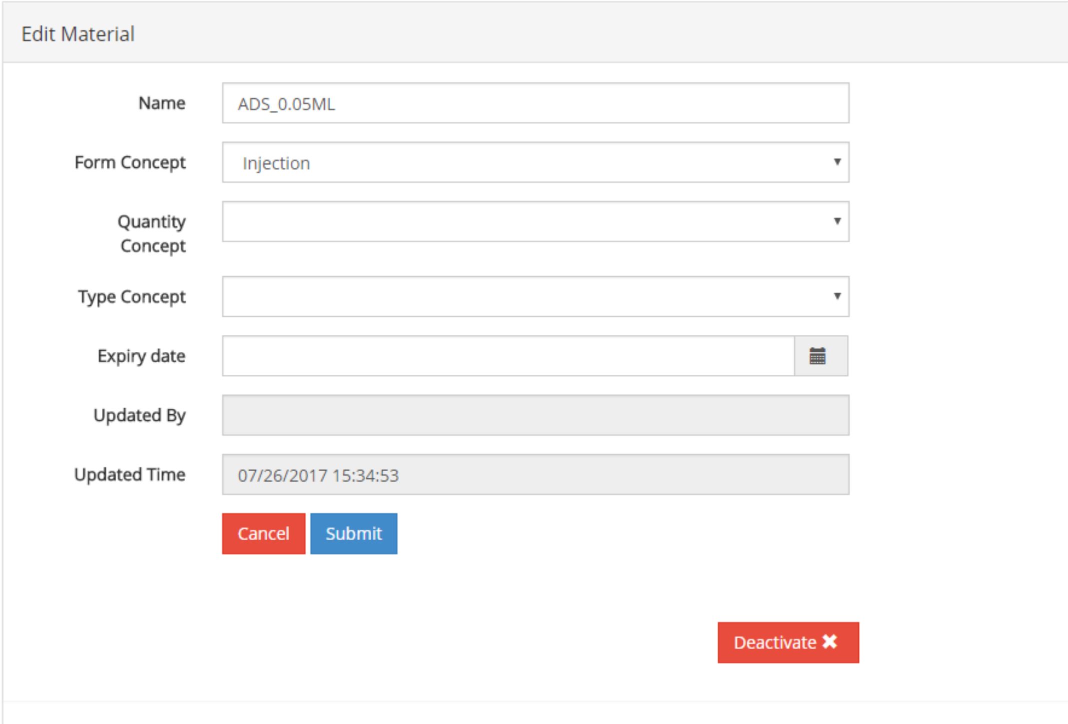


Figure 15.15 - Edit Material page

If the material being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Material Is Not Active*. To activate or deactivate a material, see the sections below.

Deactivating a Material ✖

In this area you can deactivate the material. Once deactivated the material cannot be modified or used anywhere in the system until reactivated. To deactivate a material:

Step 1: From the **Edit Material** page, click the red **Deactivate** ✖ button in the **Edit Material** area (See the figure below)

You will see a message popup stating *Material successfully deactivated* and you will be returned to the **Search & View Materials** page.

Activating a Material

If a material has been deactivated it can be reactivated in the **Edit Material** page. Once activated the material can again be modified or used in the system until deactivated. To activate a material:

Step 1: From the **Edit Material** page, click the green **Activate** button in the **Edit Material** area (See the figure below)

You will see a message popup stating *Material successfully activated* and you will be returned to the **Search & View Materials** page.

15.5.2 Identifiers Area

The **Identifiers** area displays a list of all identifiers for the material. You are also able to add new identifiers and edit or delete existing identifiers.

Creating a New Identifier

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **New** button (See the figure below)

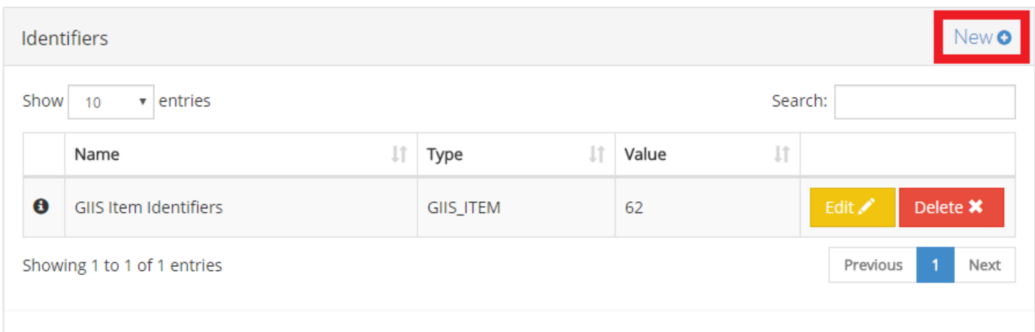


Figure 15.16 - New Identifier button

You will be brought to the **Add Identifier** page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

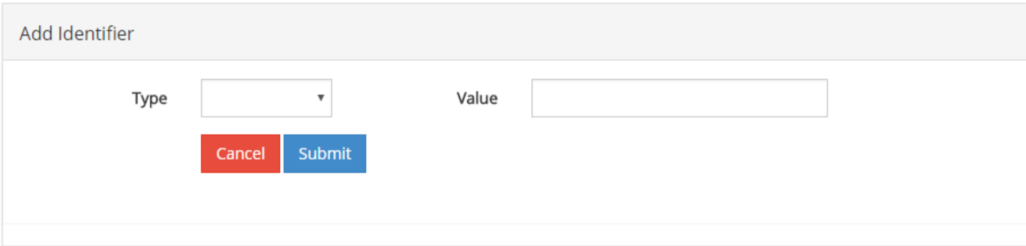
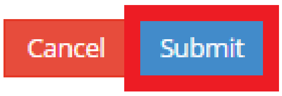


Figure 15.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new identifier you will be returned to the **Edit Material** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **Edit** button next to the identifier you wish to edit (See the figure below)

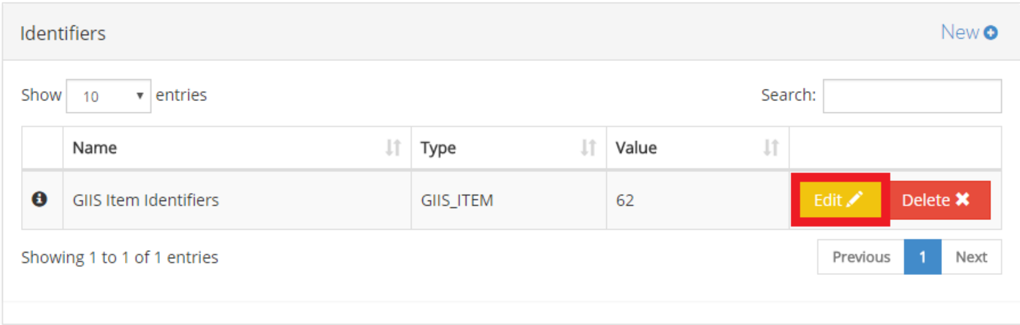


Figure 15.18 - Edit Identifier button

You will be brought to the **Edit Identifie**r page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

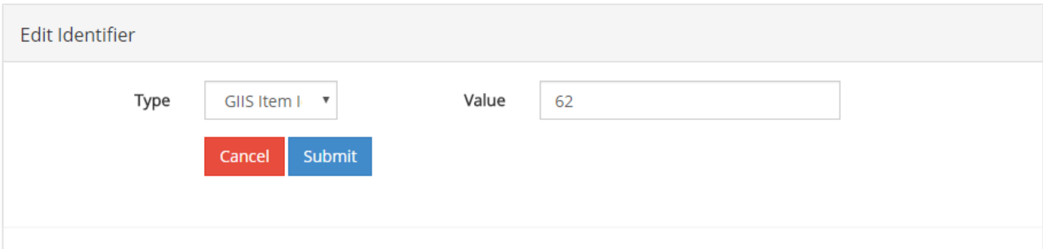
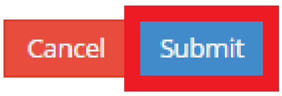


Figure 15.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Material** page, in the **Identifiers** area, click the **Delete** ✖ button next to the identifier you wish to delete (See the figure below)

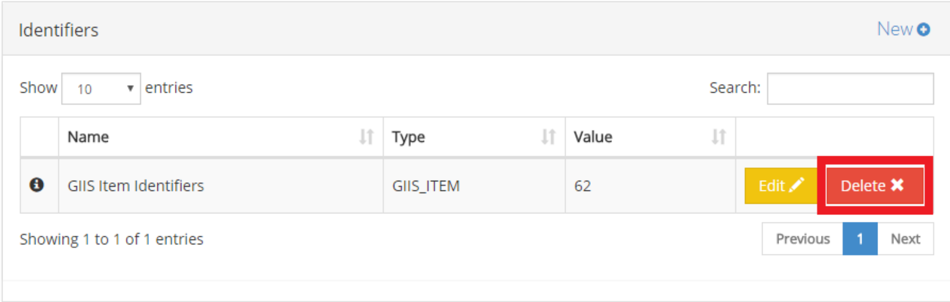


Figure 15.20 - Delete Identifier

The identifier will be deleted and the **Edit Material** page will be refreshed.

15.5.3 Relationships Area

The **Relationships** area displays a list of all relationships for the material. You are also able to add new relationships and edit or delete existing relationships. Concept materials can have relationships with manufactured materials.

Creating a New Relationship: New Manufactured Material

Step 1: From the **Edit Material** page, in the **Relationships** area, click the **New Manufactured Material** button (See the figure below)

Figure 15.21 - New Manufactured Material button

You will be brought to the **Create Manufactured Material** page. Here you can add a new relationship by using the **Create Manufactured Material** area

(See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

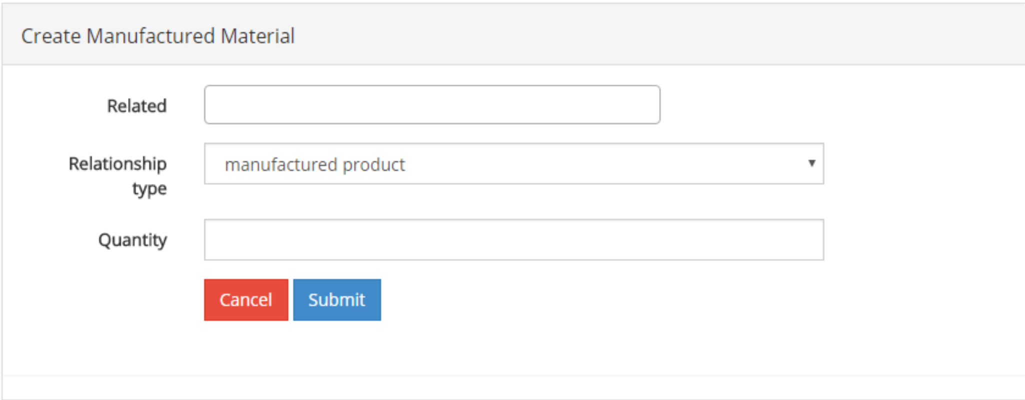


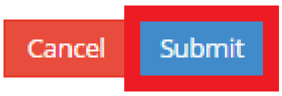
Figure 15.22 - Create Manufactured Material page

Step 2: In the **Create Manufactured Material** area, start typing the related materials name into the **Related** field

Note: Enter 4 or more characters to search for a related material

Step 3: Select a relationship type with the **Relationship Type** dropdown and enter a material quantity in the **Quantity** field

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Material** page.

Creating a New Relationship: Associate Material

Step 1: From the **Edit Material** page, in the **Relationships** area, click the **Associate Material** button (See the figure below)

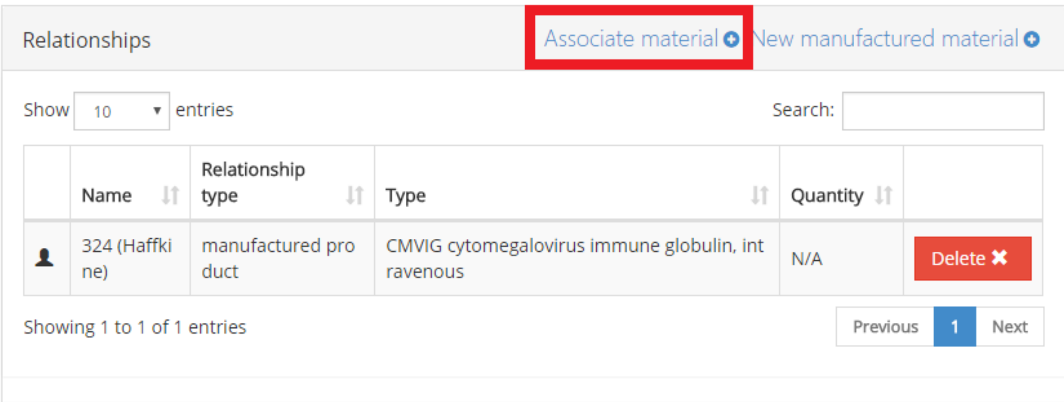


Figure 15.23 – Associate Material button

You will be brought to the **Associate Material** page. Here you can add a new relationship by using the **Associate Material** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

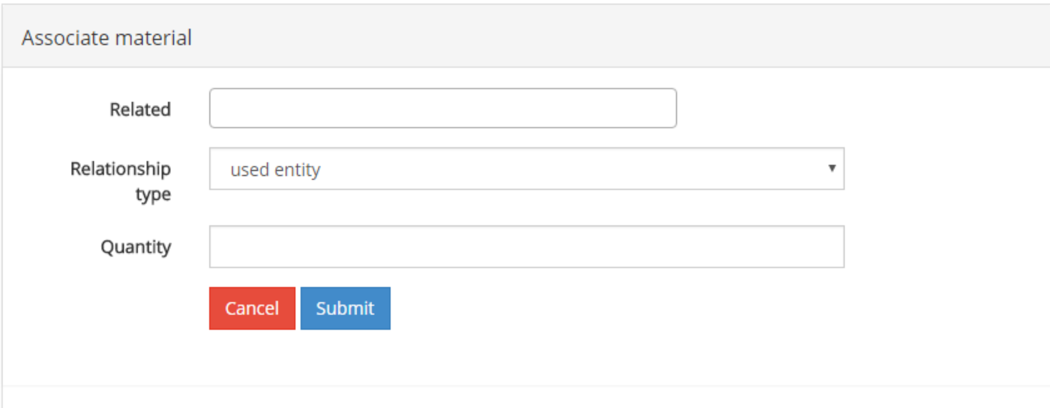


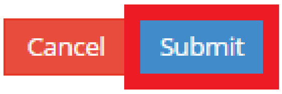
Figure 15.24 - Associate Material page

Step 2: In the **Associate Material** area, start typing the related materials name into the **Related** field

Note: Enter 2 or more characters to search for a related material

Step 3: Select a relationship type with the **Relationship Type** dropdown and enter a material quantity in the **Quantity** field

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Material** page.

Deleting a Relationship ⤮

You can delete relationships using the **Edit Material** page.

Step 1: From the **Edit Material** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)

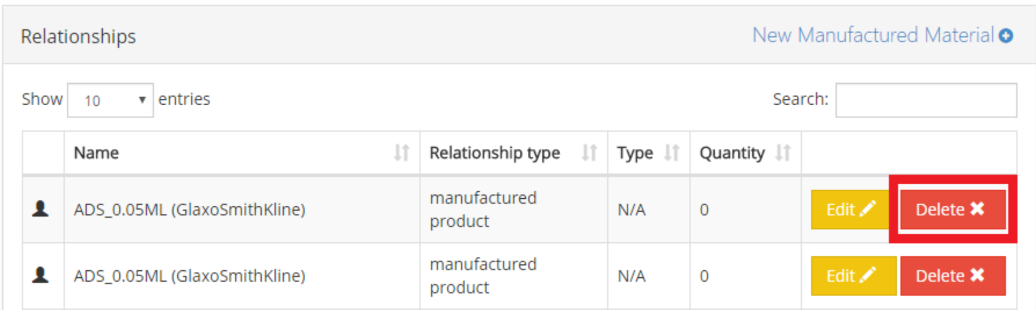


Figure 15.25 - Delete Relationship button

The relationship will be deleted and the **Edit Material** page will be refreshed.

Chapter 16: Organizations

The **Organizations** page allows you to search for organizations, or manually manage organizations and relationships. (See the figure below)

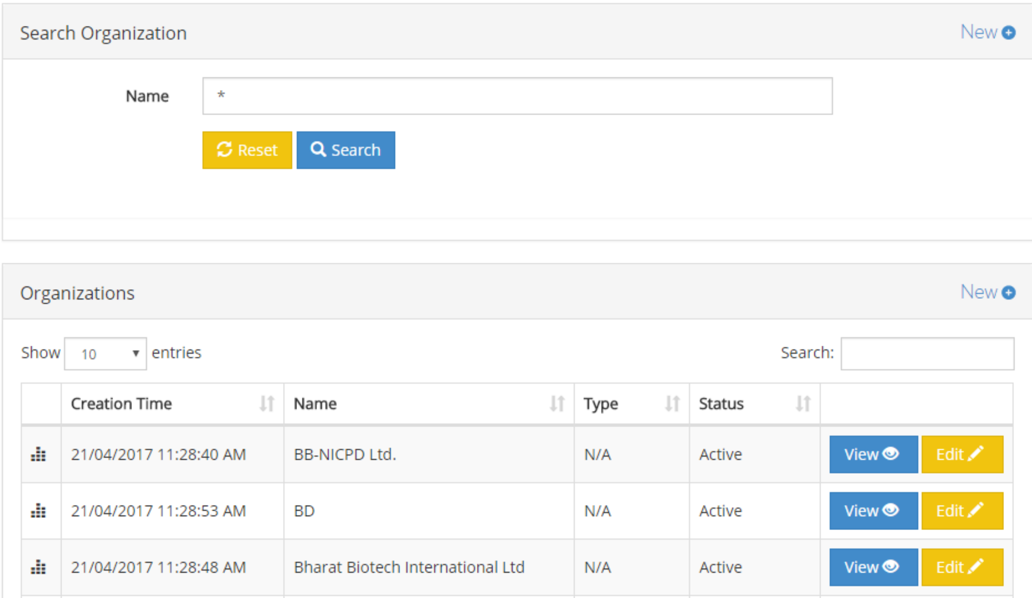


Figure 16.1 - The Organizations page

16.1 Search Organizations

If you are looking for a specific organization that already exists in the system you can use the **Search Organization** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Organization** area, enter the name of an organization (See the figure below)

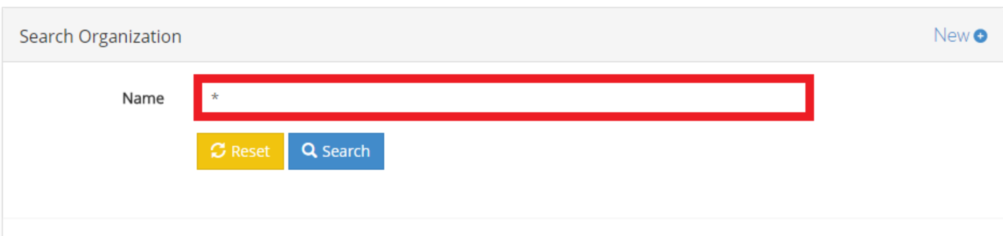
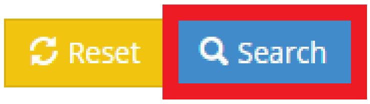


Figure 16.2 - Searching for an Organization

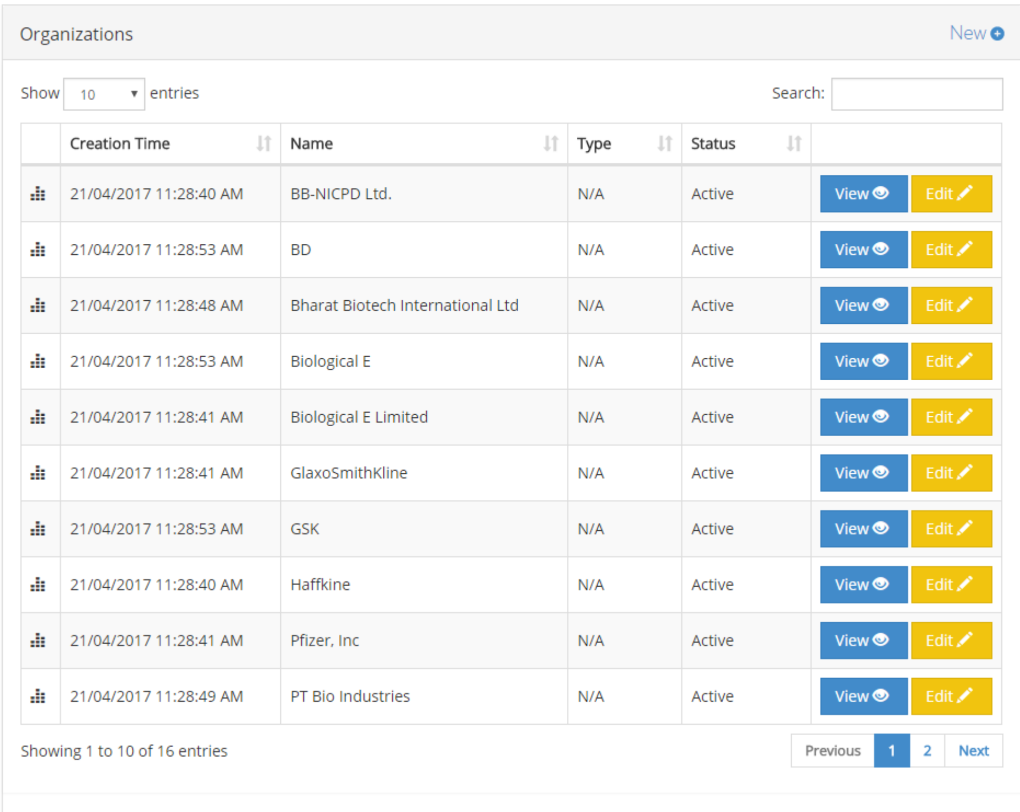
Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Organizations** area below. See the following section on **Organizations** for more information.

16.2 Organizations

The **Organization** area of the **Organization** page displays a list of all the organizations in the search results. By default the search results load with all organizations available. (See the figure below)



Organizations New

Show 10 entries Search:

	Creation Time	Name	Type	Status	
	21/04/2017 11:28:40 AM	BB-NICPD Ltd.	N/A	Active	View Edit
	21/04/2017 11:28:53 AM	BD	N/A	Active	View Edit
	21/04/2017 11:28:48 AM	Bharat Biotech International Ltd	N/A	Active	View Edit
	21/04/2017 11:28:53 AM	Biological E	N/A	Active	View Edit
	21/04/2017 11:28:41 AM	Biological E Limited	N/A	Active	View Edit
	21/04/2017 11:28:41 AM	GlaxoSmithKline	N/A	Active	View Edit
	21/04/2017 11:28:53 AM	GSK	N/A	Active	View Edit
	21/04/2017 11:28:40 AM	Haffkine	N/A	Active	View Edit
	21/04/2017 11:28:41 AM	Pfizer, Inc	N/A	Active	View Edit
	21/04/2017 11:28:49 AM	PT Bio Industries	N/A	Active	View Edit

Showing 1 to 10 of 16 entries Previous 1 2 Next

Figure 16.3 - Organizations

Organizations displayed here list details such as creation time, name, type and active status. Organizations can be viewed and managed from this page.

New organizations can also be added from this page. To add a new organization, or view and manage an existing organization, see sections below.

16.3 New Organization ⊕

When a new organization is needed to be added to the system, you can create a new organization. To create a new organization:

Step 1: From the **Organization** page, click the **New ⊕** button in the top right of the **Search Organization** area, or click the **New ⊕** button in the top right of the **Organizations** area (See the figure below)

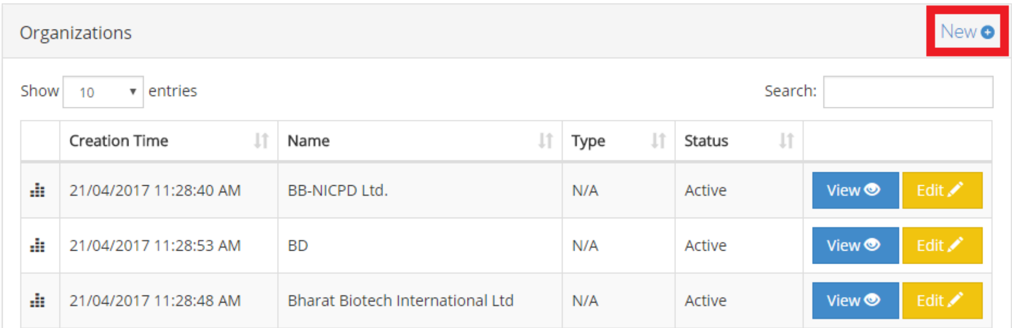


Figure 16.4 - New Organization button

Step 2: You will be brought to the **Create Organization** page (See the figure below), Enter the fields for the organization you are adding:

- Name (Required)
- Industry Concept

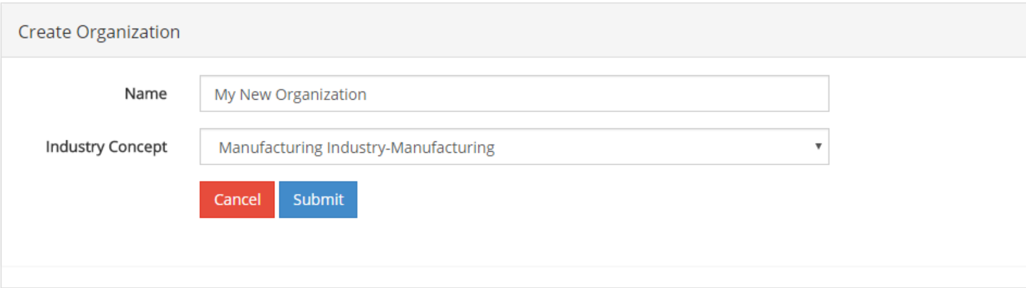
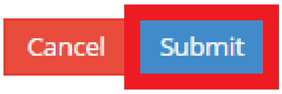


Figure 16.5 - Create Organization page

Step 3: Press the **Submit** button to create the organization (See the figure below)



If created successfully you should see a popup display message saying the *Organization created successfully*. From here you will see the **View Organization** page. See below for more details on viewing and editing organizations.

16.4 View Organizations

After finding an organization in the search results, or after creating a new organization you can view the organization's details.

Step 1: From the **Organizations** page, find an organization you would like to view and press the **View** button (See the figure below)

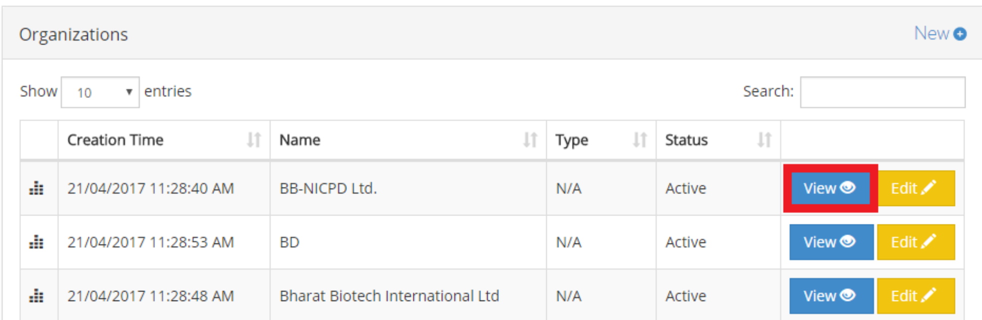


Figure 16.6 - View Organization button

You will be brought to **View Organization** page for the organization you selected to view. (See the figure below)

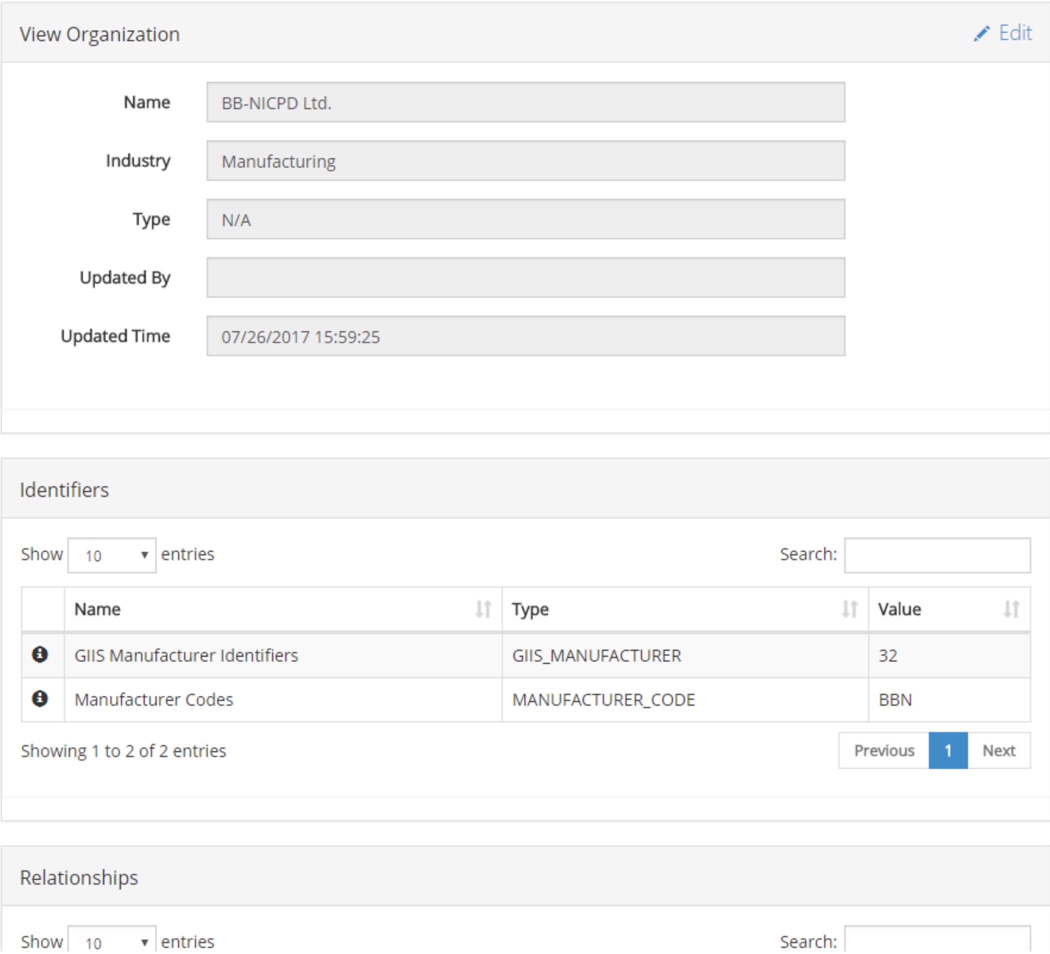


Figure 16.7 - View Organization page

16.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the organization. If the organization has not yet been verified, you will see the **Record Verification Required** area appear above the **View Organization** area on the **View Organization** page. (See the figure below)

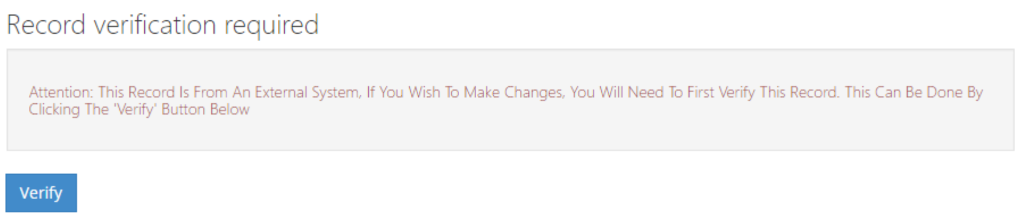


Figure 16.8 - Record Verification Required alert

If you want to verify this organization:

Step 1: Look through the organization information, identifiers and relationships for the organization you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

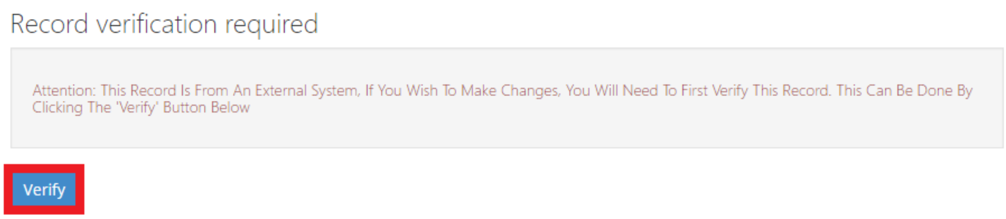


Figure 16.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and be returned to the **View Organization** page for the organization you are currently viewing.

16.4.2 View Organization Area

The **View Organization** area displays the initial information for the organization that was created. Details such as the name, industry, and the type concept for the organization are all displayed in this area. (See the figure below)

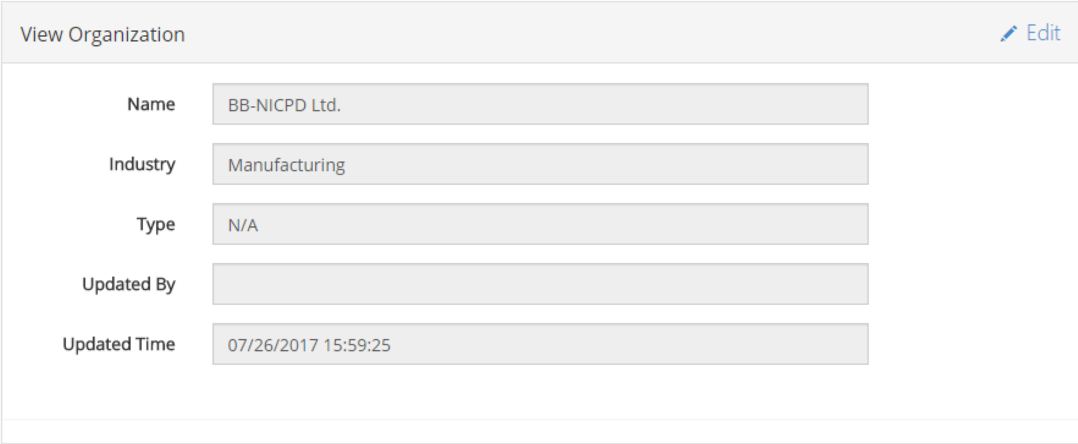


Figure 16.10 - View Organization area

16.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the organization. (See the figure below)

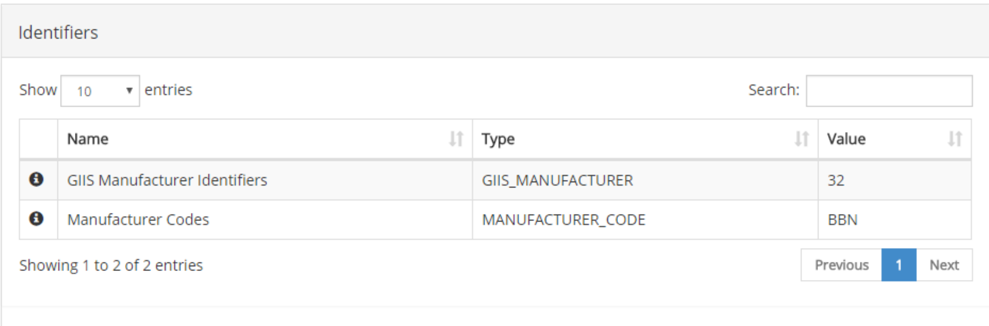


Figure 16.11 - Identifiers area

16.4.4 Relationships

The **Relationships** area displays a list of relationships between organizations and manufactured materials. Also displayed here are details such as the name, relationship type, type and quantity.

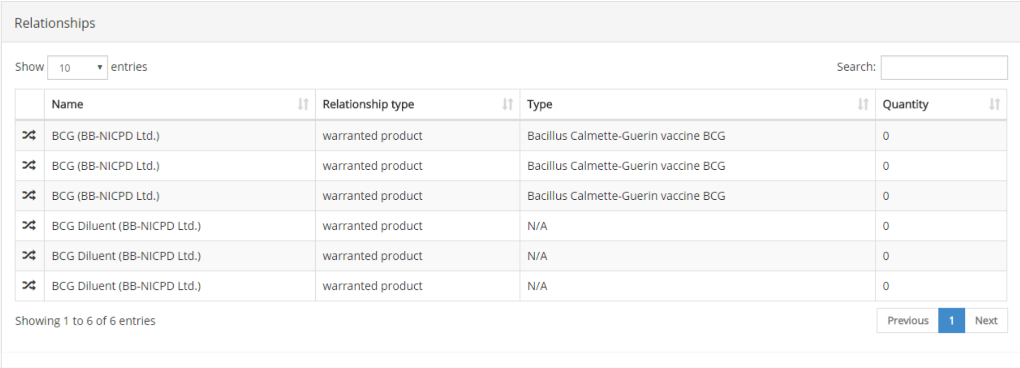


Figure 16.12 - Relationships area

16.5 Edit Organization

Each organization has several components that can be edited. You can change the initial details, add or change identifiers, and add or change relationships.

To access the **Edit Organization** page from the **Organizations** page:

Step 1: Find an organization using the search bar and click the **Edit** button (See the figure below)

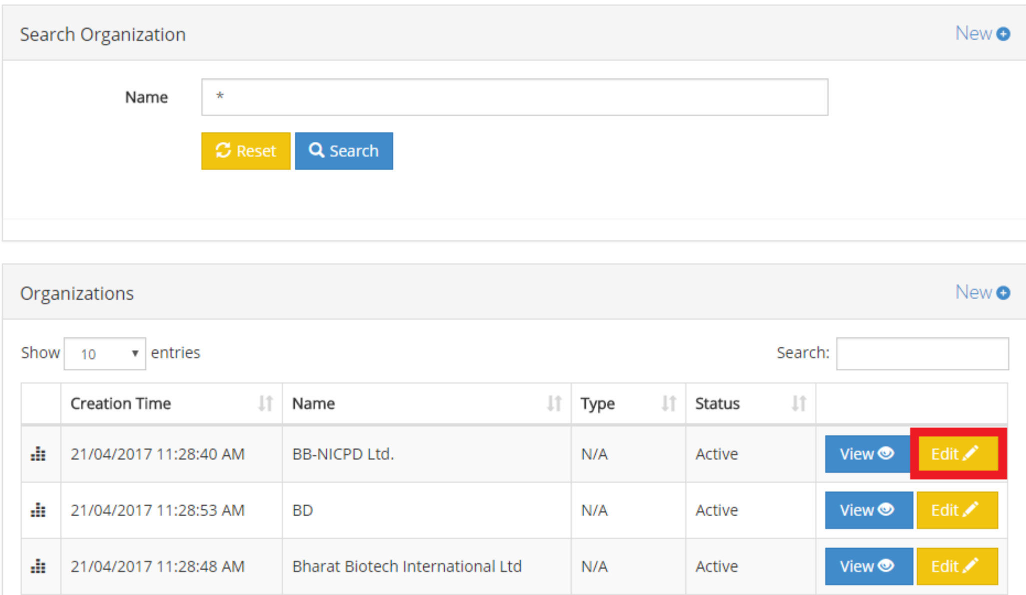


Figure 16.13 - Edit Organization from the Organizations page

To access the **Edit Organization** page from the **View Organization** page:

Step 1: Click the **Edit** ✎ button (See the figure below)

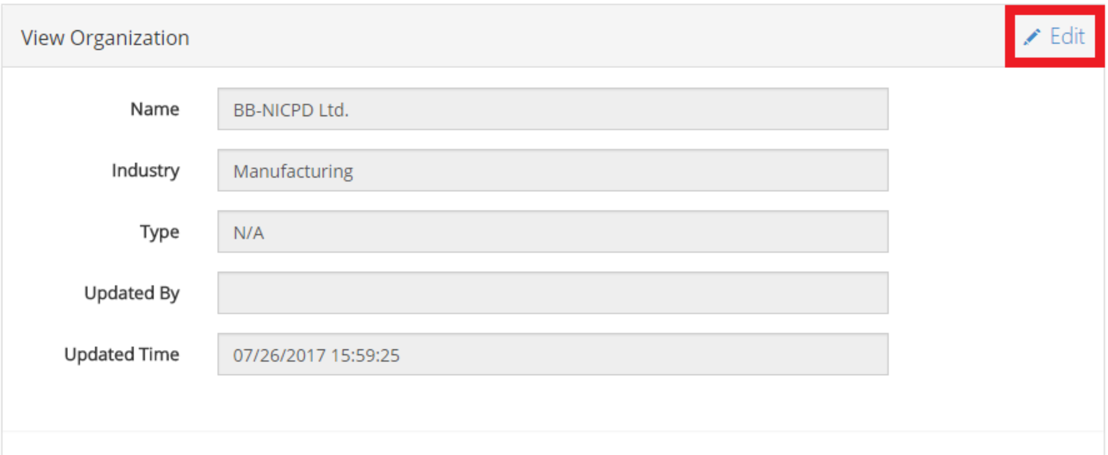


Figure 16.14 - Edit Organization from the View Organization page

You will be brought to **Edit Organization** page for the organization you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

16.5.1 Edit Organization Area

In this area you can change all the basic values set for the organization you are viewing. *Required fields: Name.* (See the figure below)

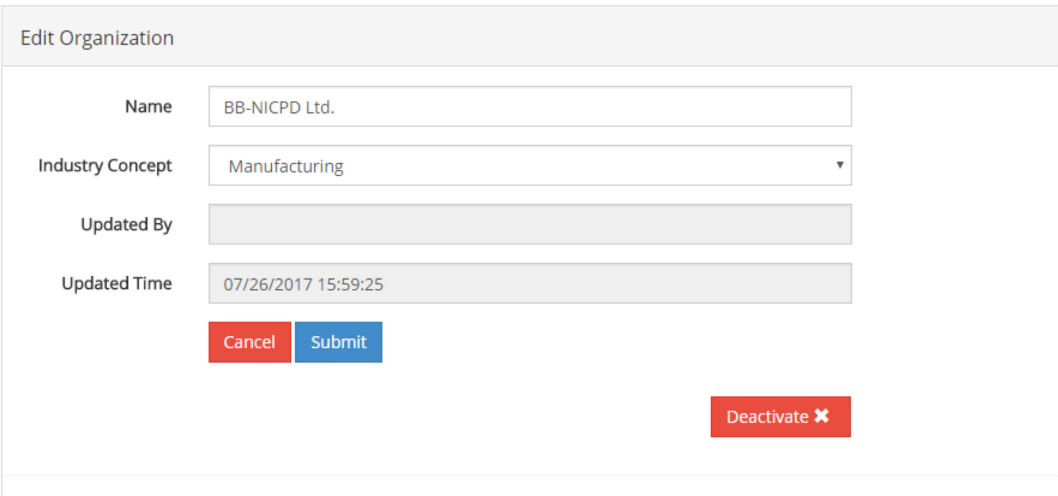


Figure 16.15 - Edit Organization page

If the organization being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Organization Is Not Active*. To activate or deactivate an organization, see the sections below.

Deactivating an Organization ✖

In this area you can deactivate the organization. Once deactivated the organization cannot be modified or used anywhere in the system until reactivated. To deactivate an organization:

Step 1: From the **Edit Organization** page, click the red **Deactivate** ✖ button in the **Edit Organization** area (See the figure below)

You will see a message popup stating *Organization successfully deactivated* and you will be returned to the **Search & View Organizations** page.

Activating an Organization

If an organization has been deactivated it can be reactivated in the **Edit Organization** page. Once activated the organization can again be modified or used in the system until deactivated. To activate an organization:

Step 1: From the **Edit Organization** page, click the green **Activate** button in the **Edit Organization** area (See the figure below)

You will see a message popup stating *Organization successfully activated* and you will be returned to the **Search & View Organizations** page.

16.5.2 Identifiers Area

The **Identifiers** area displays a list of all identifiers for the organization. You are also able to add new identifiers and edit or delete existing identifiers.

Creating a New Identifier

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **New** button (See the figure below)

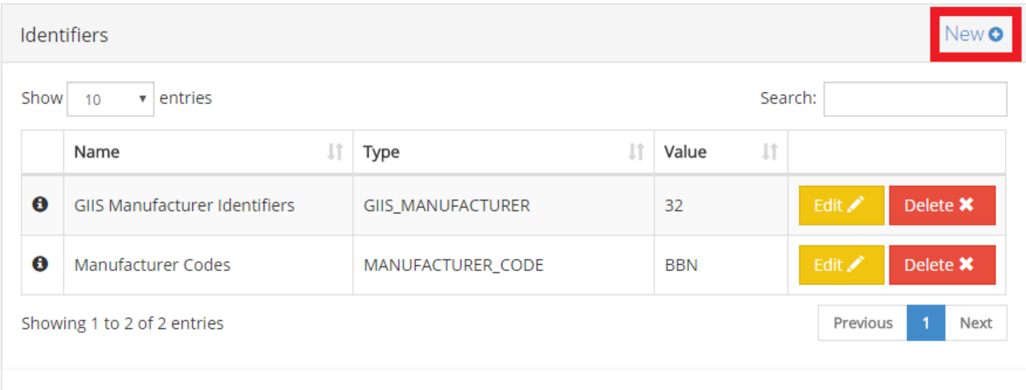


Figure 16.16 - New Identifier button

You will be brought to the **Add Identifie**r page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

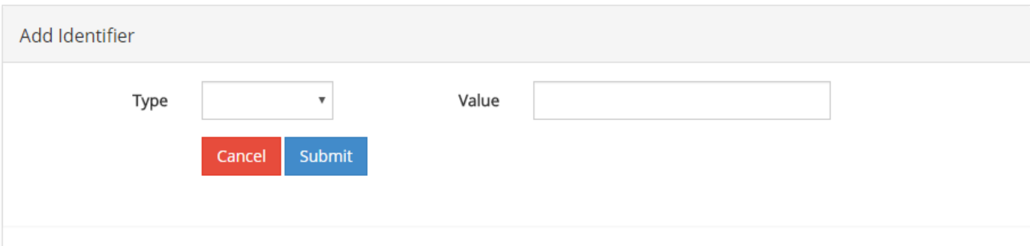


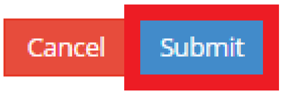
Figure 16.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type** (Required)

- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new identifier you will be returned to the **Edit Organization** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **Edit** button next to the identifier you wish to edit (See the figure below)

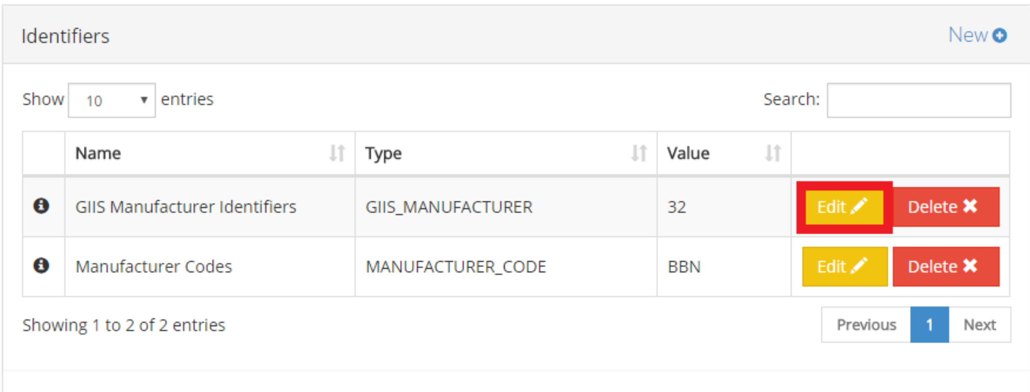


Figure 16.18 - Edit Identifier button

You will be brought to the **Edit Identifier** page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

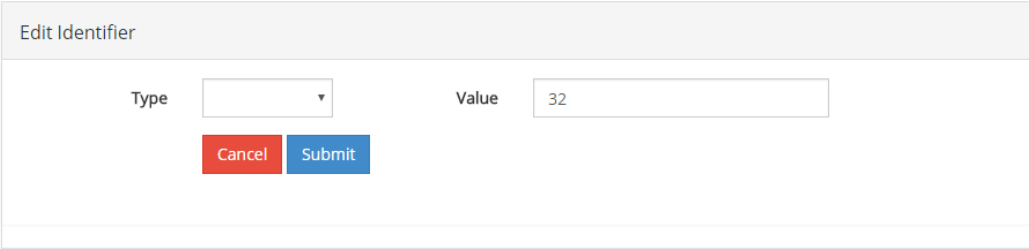
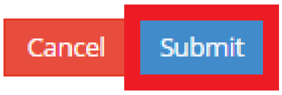


Figure 16.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Organization** page, in the **Identifiers** area, click the **Delete ✖** button next to the identifier you wish to delete (See the figure below)

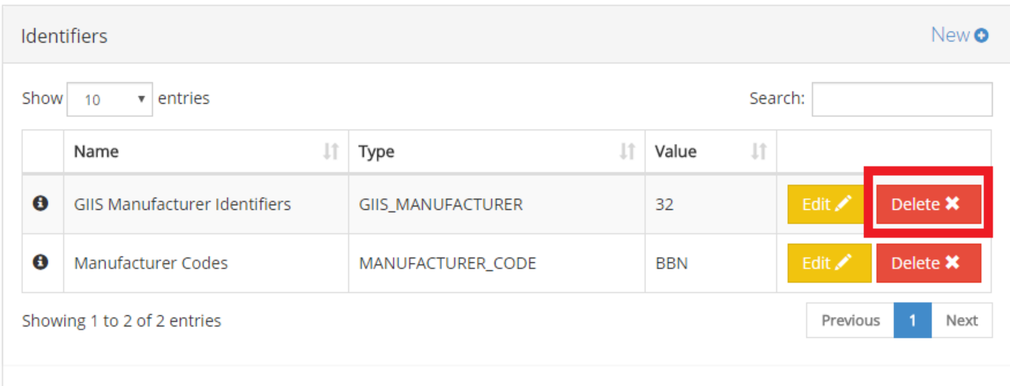


Figure 16.20 - Delete Identifier

The identifier will be deleted and the **Edit Organization** page will be refreshed.

16.5.3 Relationships Area

The **Relationships** area displays a list of all relationships for the organization. You are also able to add new relationships and edit or delete existing relationships. Manufactured materials can have relationships with organizations.

Creating a New Relationship

Step 1: From the **Edit Organization** page, in the **Relationships** area, click the **New Manufactured Material** button (See the figure below)

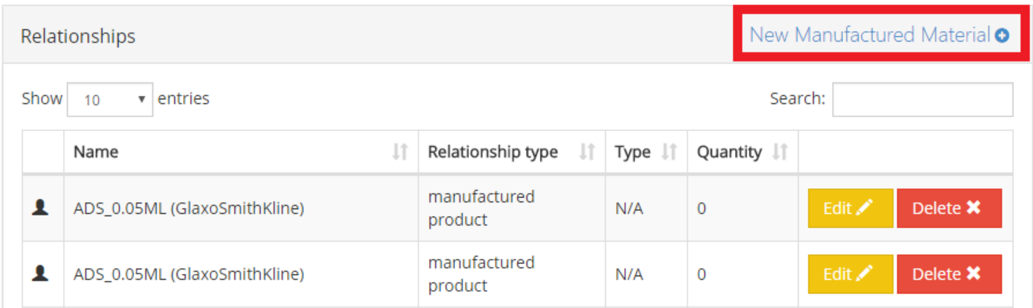


Figure 16.21 - New Manufactured Material button

You will be brought to the **Create Manufactured Material** page. Here you can add a new relationship by using the **Create Manufactured Material** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

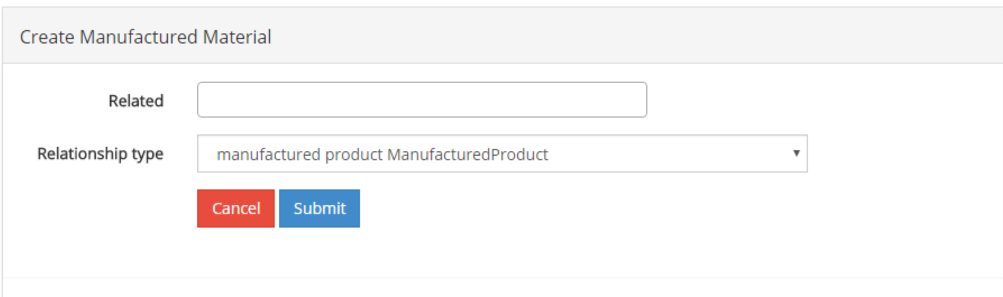
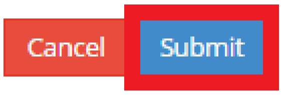


Figure 16.22 - Create Manufactured Material page

Step 2: In the **Create Manufactured Material** area, start typing the related materials name into the **Related** field

Note: Enter 4 or more characters to search for a related material

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Organization** page.

Deleting a Relationship

You can delete relationships using the **Edit Organization** page.

Step 1: From the **Edit Organization** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)

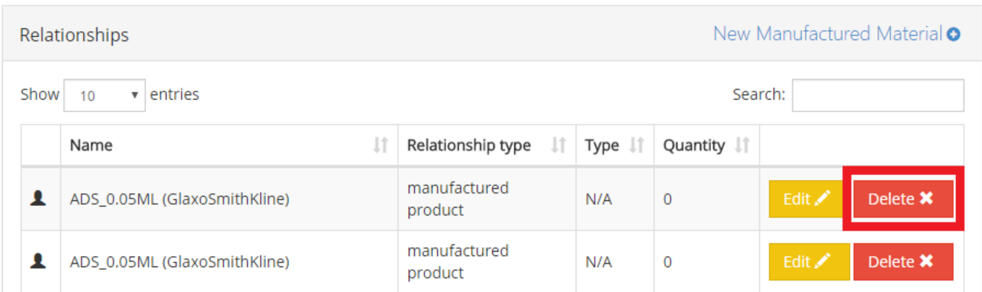


Figure 16.25 - Delete Relationship button

The relationship will be deleted and the **Edit Organization** page will be refreshed.

Chapter 17: Places

The **Places** page allows you to search for places, or manually manage places and relationships. (See the figure below)

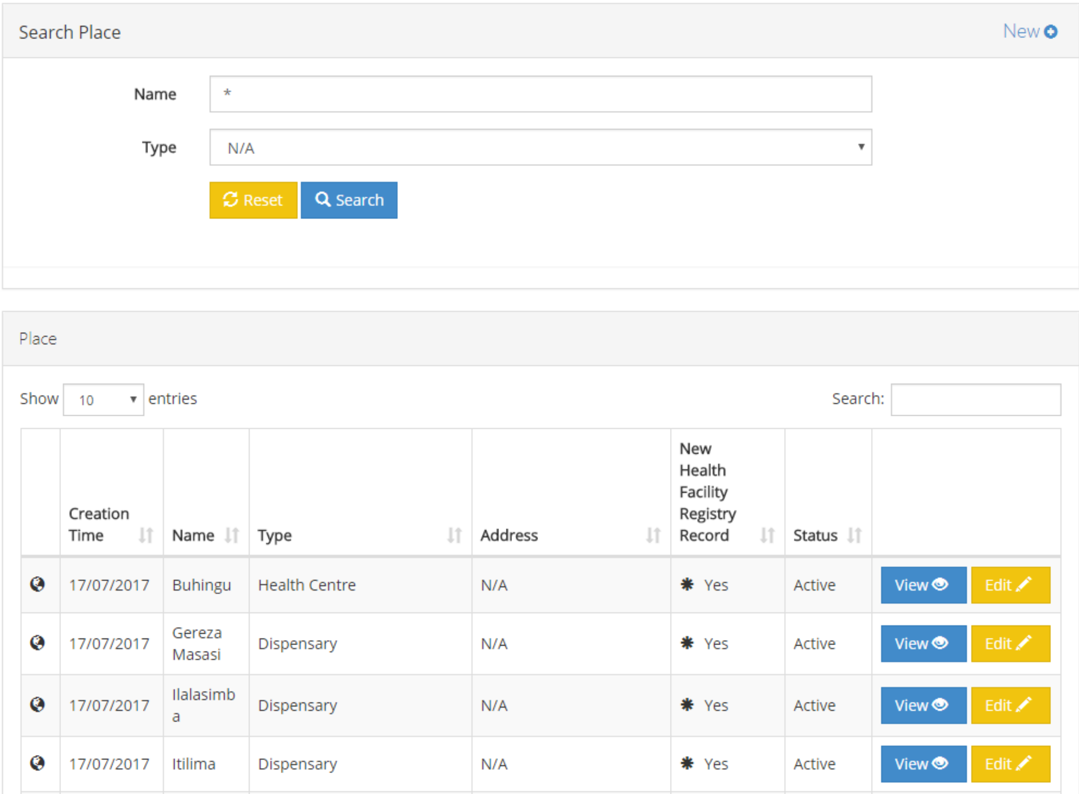


Figure 17.1 - The Places page

17.1 Search Places

If you are looking for a specific place that already exists in the system you can use the **Search Place** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Place** area, enter the name of a place (See the figure below)

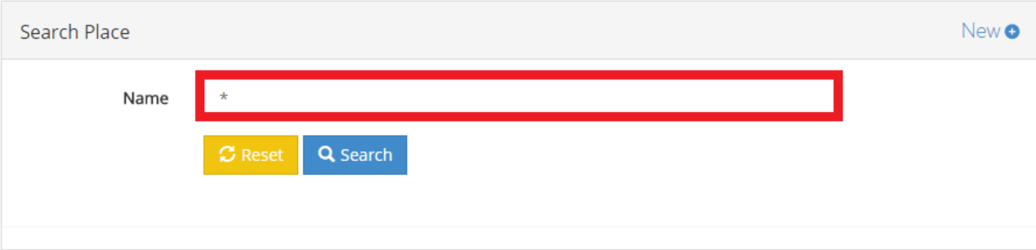
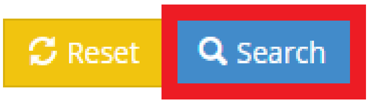


Figure 17.2 - Searching for a Place

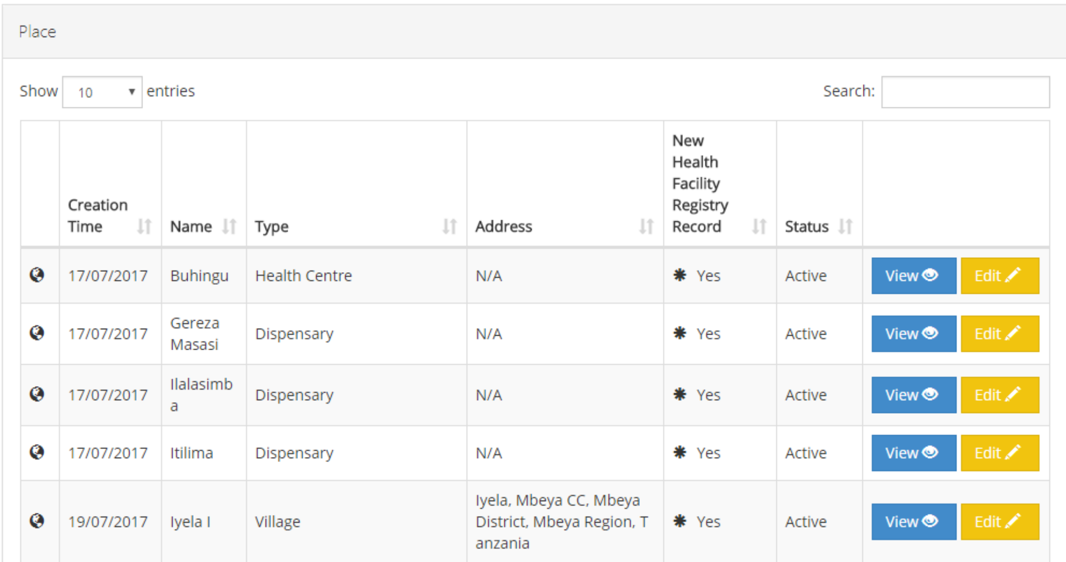
Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Places** area below. See the following section on **Places** for more information.

17.2 Places

The **Search Results** area of the **Places** page displays a list of all the places in the search results. By default the search results load with all places available. (See the figure below)


Place

Show 10 entries Search:

	Creation Time	Name	Type	Address	New Health Facility Registry Record	Status	
	17/07/2017	Buhingu	Health Centre	N/A	Yes	Active	View Edit
	17/07/2017	Gereza Masasi	Dispensary	N/A	Yes	Active	View Edit
	17/07/2017	Ilalasimba	Dispensary	N/A	Yes	Active	View Edit
	17/07/2017	Itilima	Dispensary	N/A	Yes	Active	View Edit
	19/07/2017	Iyela I	Village	Iyela, Mbeya CC, Mbeya District, Mbeya Region, Tanzania	Yes	Active	View Edit

Figure 17.3 - Places page

Places displayed here list details such as creation time, name, type and active status. Places can be viewed and managed from this page.

New places can also be added from this page. To add a new place, or view and manage an existing place, see sections below.

17.3 New Places ✪

You can create a new place to have it implemented in the system. To create a new place:

Step 1: From the **Places** page, click the **New ✪** button in the top right of the **Search Place** area (See the figure below)

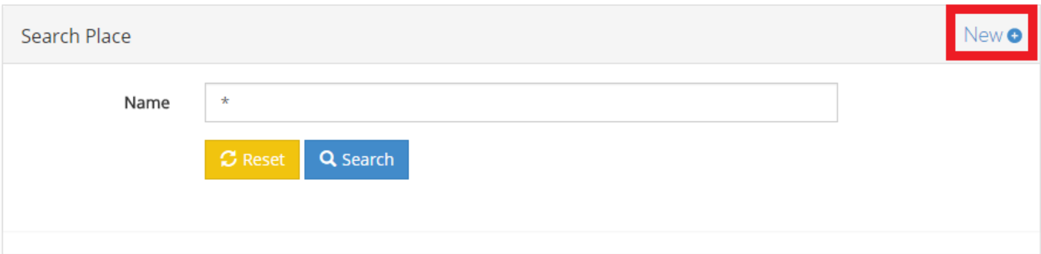


Figure 17.4 - New place button

Step 2: You will be brought to the **Create Place** page, enter or select the fields for the place you are adding (See the figure below):

- Name (Required)
- Country

  Note: You must enter 4 or more characters to search for a country

- State

  Note: You must enter 4 or more characters to search for a state

- County

Note: You must enter 4 or more characters to search for a county

- City

  Note: You must enter 4 or more characters to search for a city

- Precinct

  Note: You must enter 4 or more characters to search for a precinct

- Street Address
- Target Population
- Target Population Year
- Type Concept

  Note: Type concept for Places is the place type (district/facility/village and more)

- Service delivery location checkbox

  Note: Check this box if the Place being created is providing a service such as care

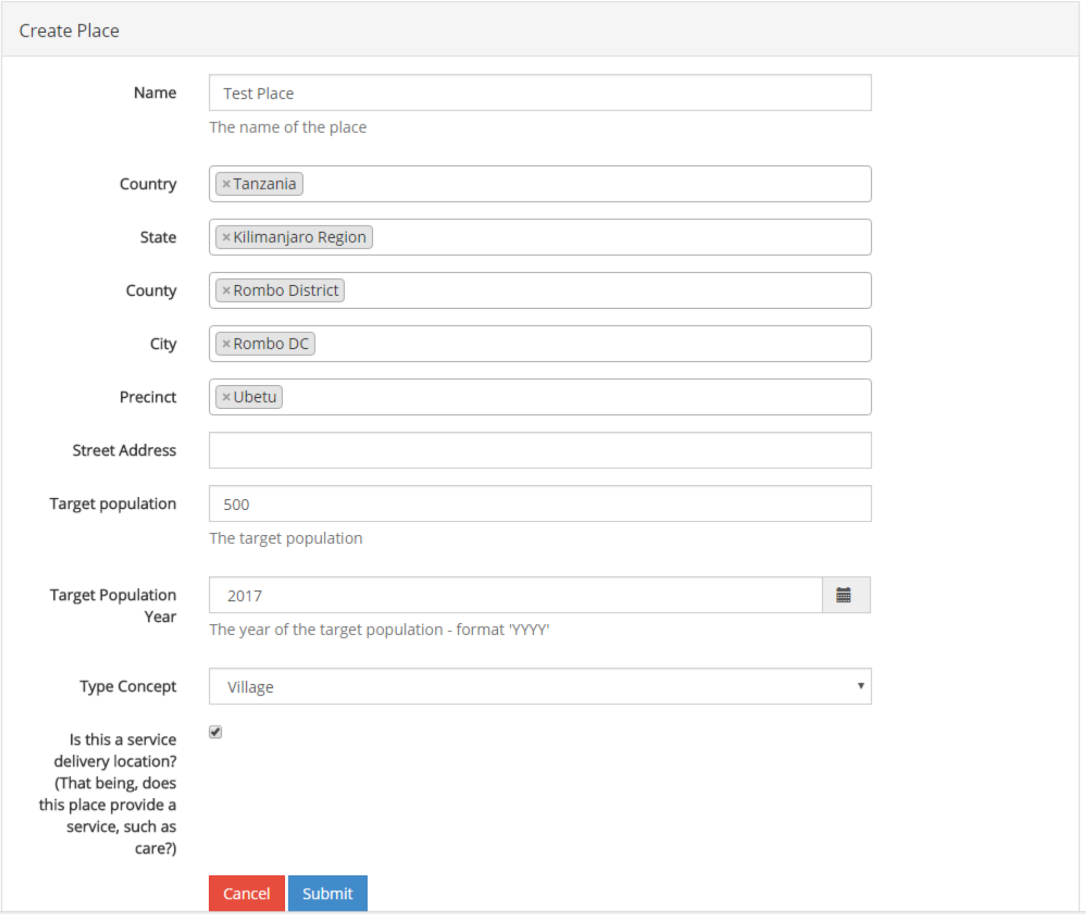
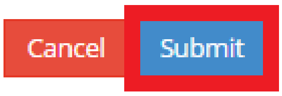


Figure 17.5 - Create Place page

Step 3: Press the **Submit** button to create the place (See the figure below)



If created successfully you should see a popup display message saying the *Place created successfully*. From here you will see the **View Place** page. See below for more details on viewing and editing places.

17.4 Viewing Places

After finding a place in the search results, or creating a new place you can view the places details.

Step 1: From the **Places** page, find a place you would like to view and press the **View** button (See the figure below)

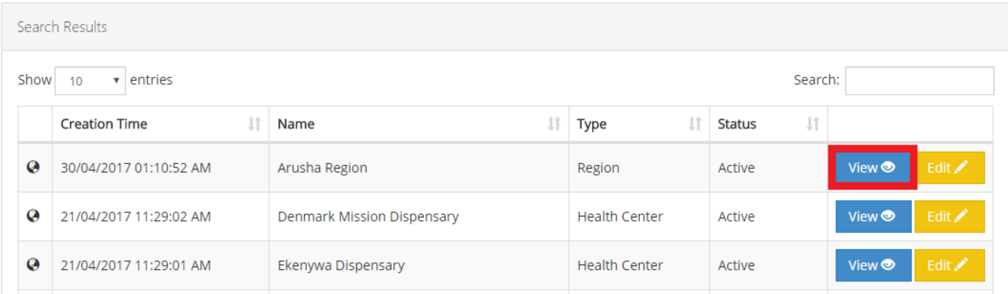


Figure 17.6 - View Place button

You will be brought to **View Place** page for the place you selected to view. (See the figure below)

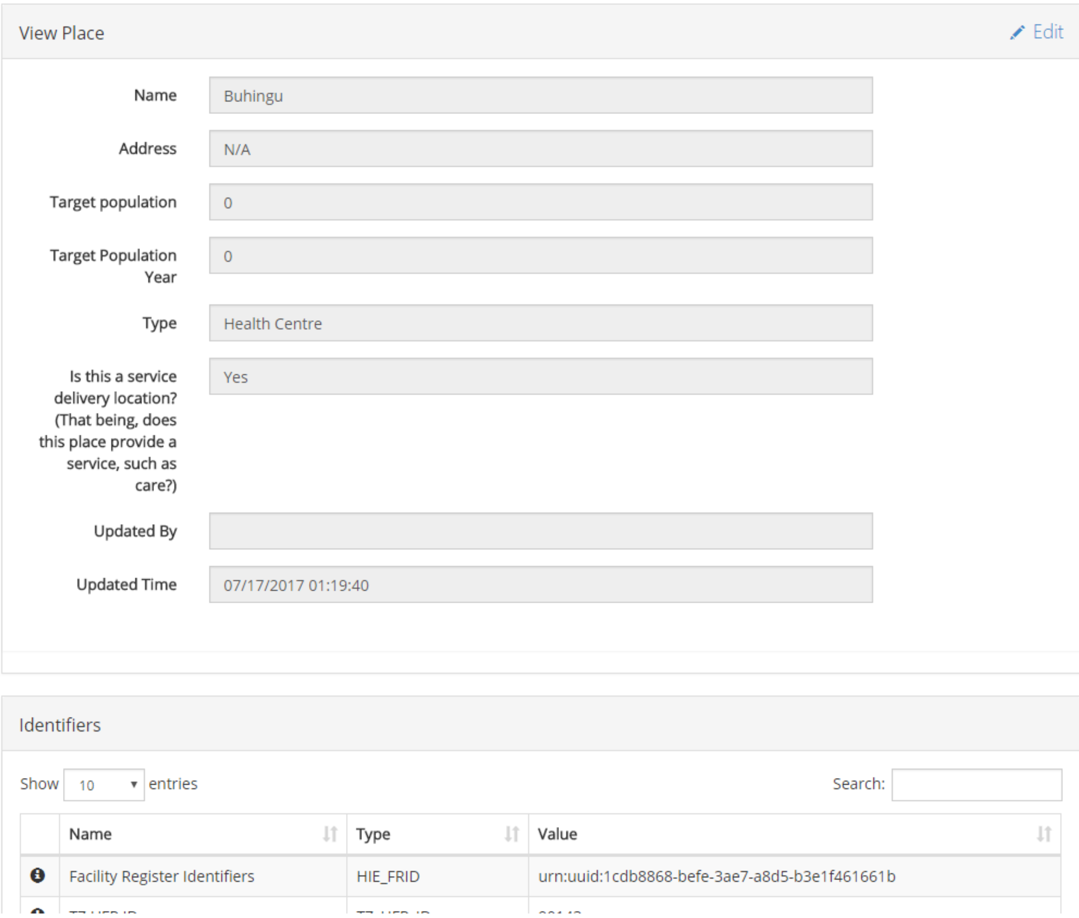


Figure 17.7 - View Place page

17.4.1 Record Verification

Sometimes records may be added from an external system. This can be left alone unless you wish to make any changes to the place. If the place has not yet been verified, you will see the **Record Verification Required** area appear above the **View Place** area on the **View Place** page (See the figure below).

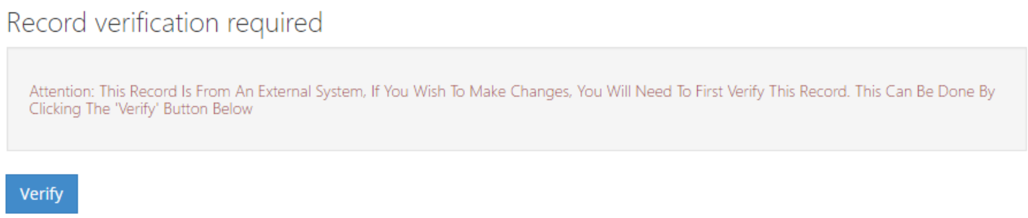


Figure 17.8 - Record Verification Required alert

If you want to verify this place:

Step 1: Look through the place Information, identifiers and relationships for the place you want to verify, ensure it is correct

Step 2: Press the **Verify** button (See the figure below)

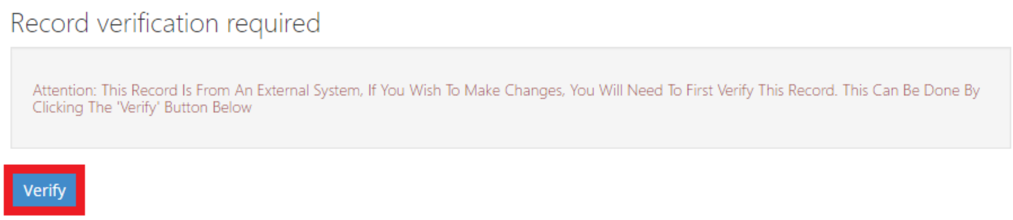


Figure 17.9 - Record Verification Required Verify button

You will see a green popup message stating the *Data verified successfully* and be returned to the **View Place** page for the place you are currently viewing.

17.4.2 View Place Area

The **View Place** area displays the initial information for the place that was created. Details such as the name, target population and type concept for the place are all displayed in this area. (See the figure below)

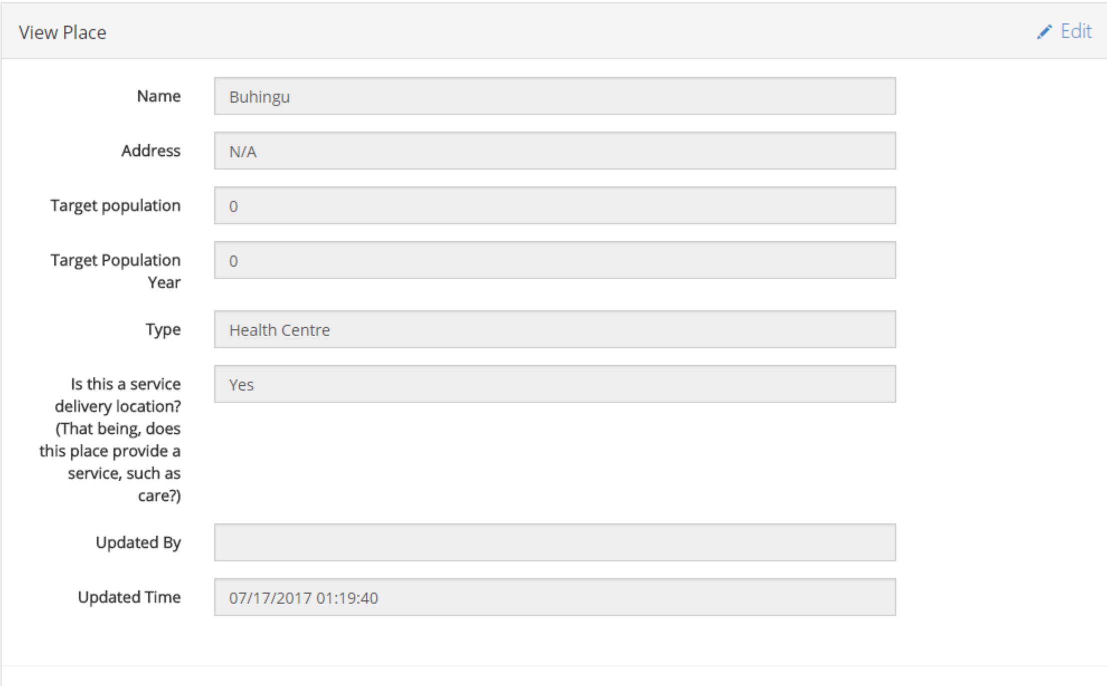


Figure 17.10 - View Place area

17.4.3 Identifiers

The **Identifiers** area displays a list of all identifiers for the place. (See the figure below)

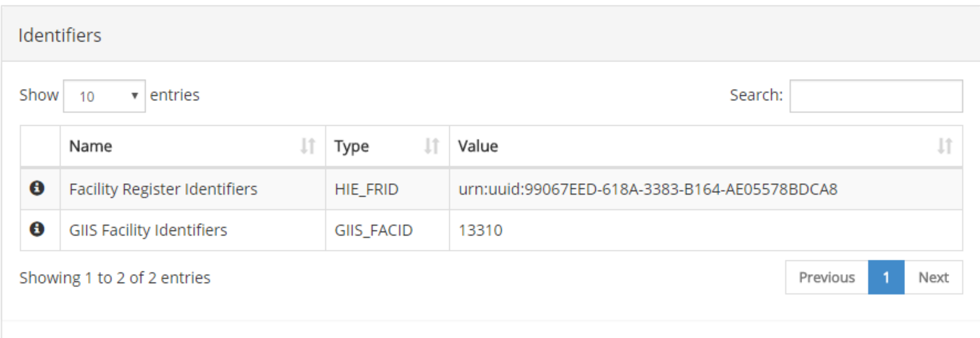


Figure 17.11 - Identifiers area

17.4.4 Relationships

The **Relationships** area displays a list of relationships between places and materials. Also displayed here are details such as the name, relationship type, type and quantity. (See the figure below)

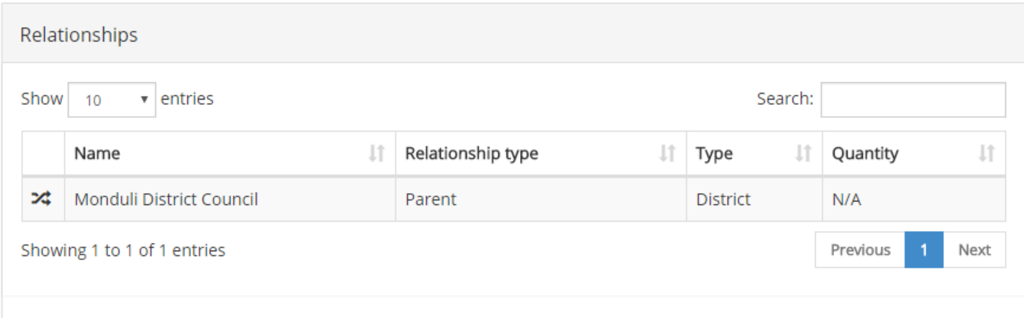


Figure 17.12 - Relationships area

17.5 Editing Places

Each place has several components that can be edited. You can change the initial details, add or change identifiers and add or change relationships.

To access the **Edit Place** page from the **Places** page:

Step 1: Find a place using the search bar and click the **Edit** button (See the figure below)

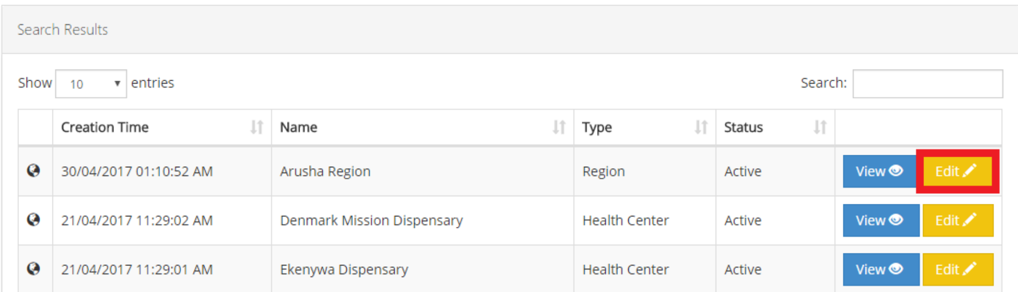


Figure 17.13 - Place Edit button

To access the **Edit Place** page from the **View Place** page:

Step 1: Click the **Edit** ✎ button (See the figure below)

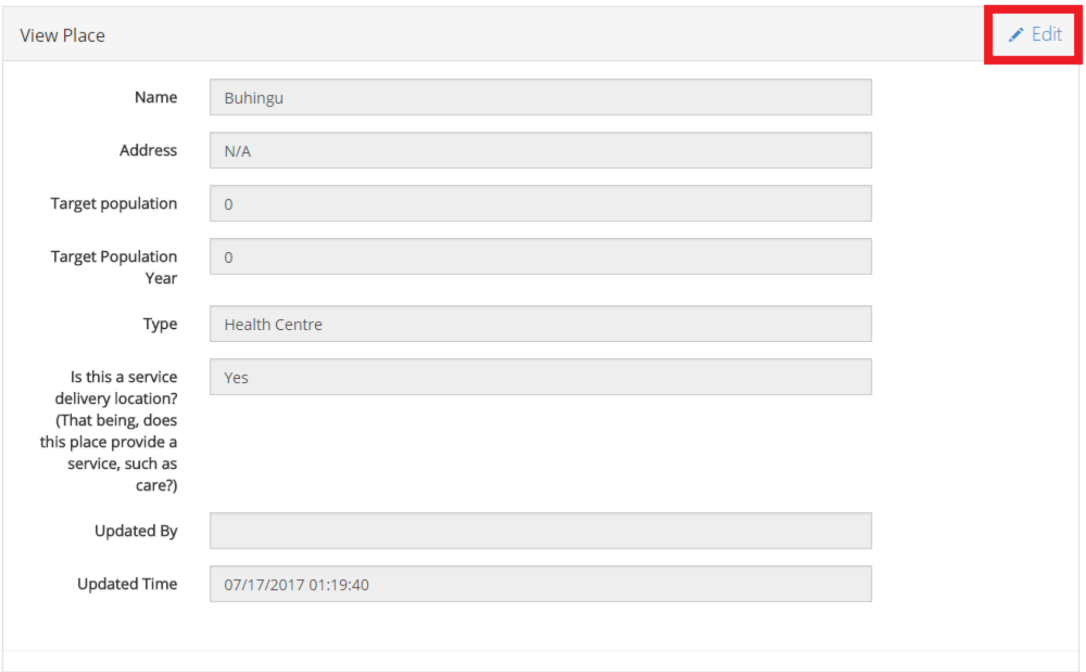


Figure 17.14 - View Place Edit button

You will be brought to **Edit Place** page for the place you selected to edit. From this page you can modify fields and add/edit/remove identifiers and relationships.

17.5.1 Edit Place Area

In this area you can change all the basic values set for the place you are viewing. *Required fields: Name.* (See the figure below)

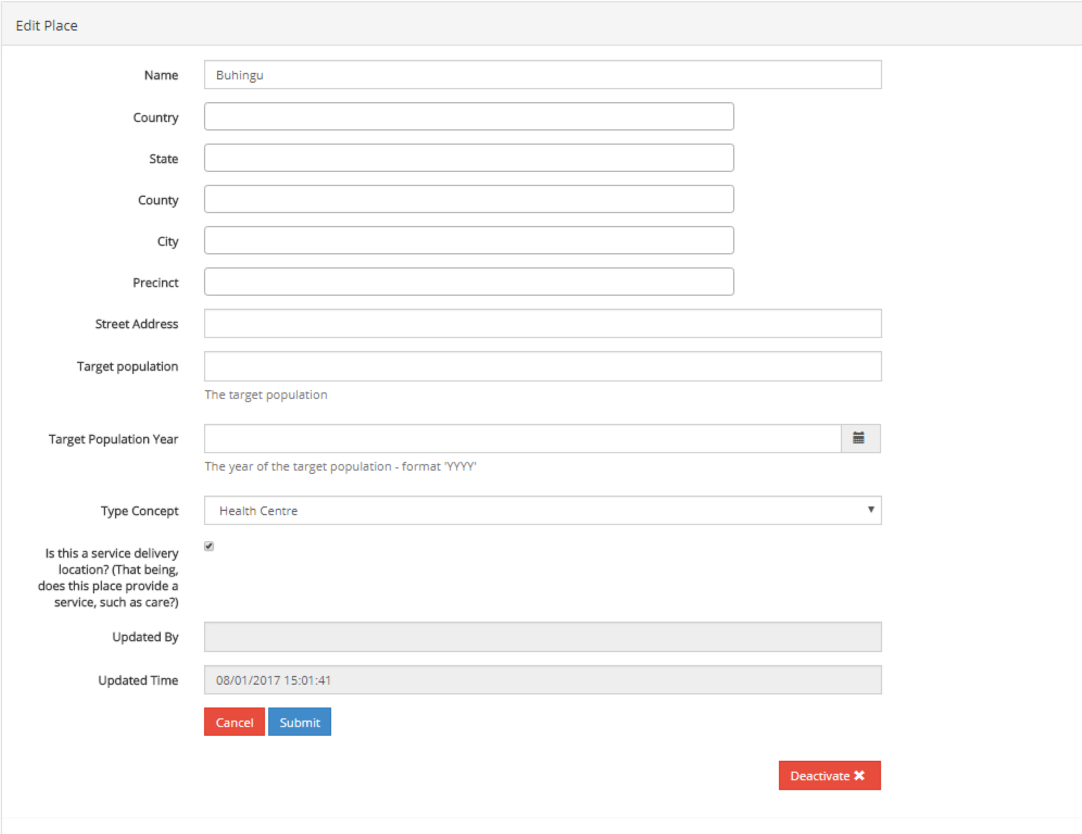


Figure 17.15 - Edit Place area

If the place being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Place Is Not Active*. To activate or deactivate a place, see the sections below.

Deactivating a Place ✖

In this area you can deactivate the place. Once deactivated the place cannot be modified or used anywhere in the system until reactivated. To deactivate a place:

Step 1: From the **Edit Place** page, click the red **Deactivate ✖** button in the **Edit Place** area (See the figure below)

You will see a message popup stating *Place successfully deactivated* and you will be returned to the **Search & View Places** page.

Activating a Place

If a place has been deactivated it can be reactivated in the **Edit Place** page. Once activated the place can again be modified or used in the system until deactivated. To activate a place:

Step 1: From the **Edit Place** page, click the green **Activate** button in the **Edit Place** area (See the figure below)

You will see a message popup stating *Place successfully activated* and you will be returned to the **Search & View Places** page.

17.5.2 Identifiers Area

The **Identifiers** area displays a list of all identifiers for the place. You are also able to add new identifiers and edit or delete existing identifiers.

Creating a New Identifier

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **New** button (See the figure below)

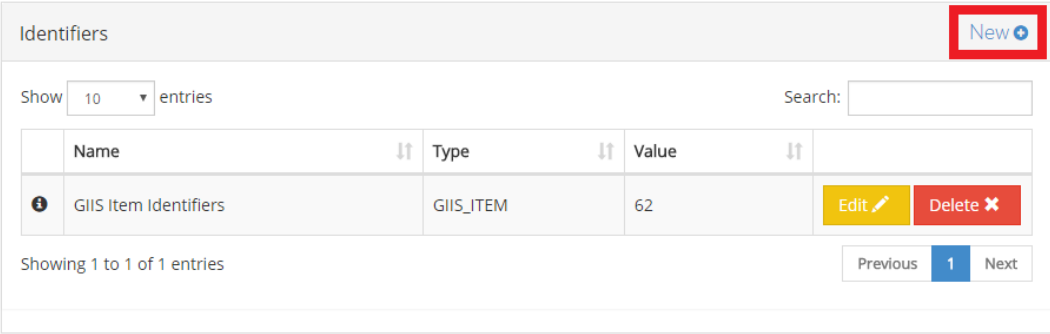


Figure 17.16 - New Identifier button

You will be brought to the **Add Identifier** page. Here you can add an identifier by using the **Add Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

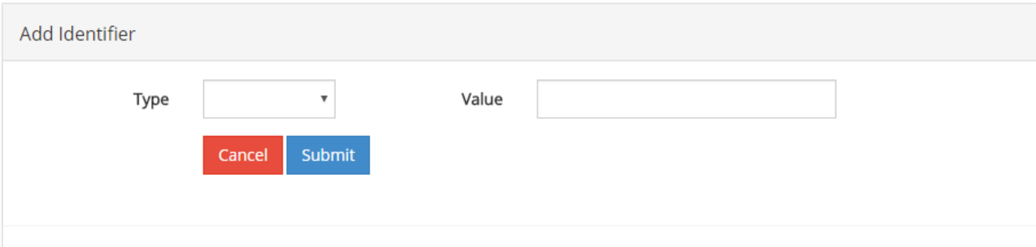
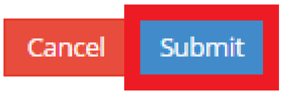


Figure 17.17 - Add Identifier page

Step 2: In the **Add Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new identifier you will be returned to the **Edit Place** page.

Editing an Identifier

You can view and edit existing identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **Edit** button next to the identifier you wish to edit (See the figure below)

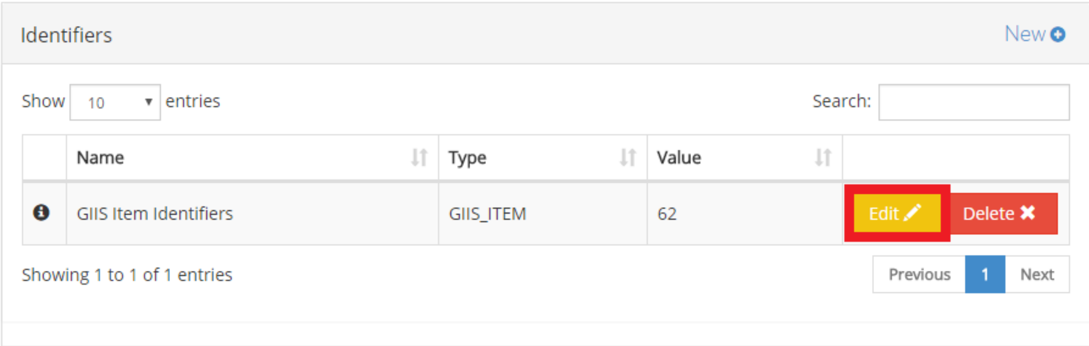


Figure 17.18 - Edit Identifier button

You will be brought to the **Edit Identifie**r page. Here you can edit the identifier by using the **Edit Identifier** area (See the figure below) and also see the list of current identifiers in the **Identifiers** area of this page.

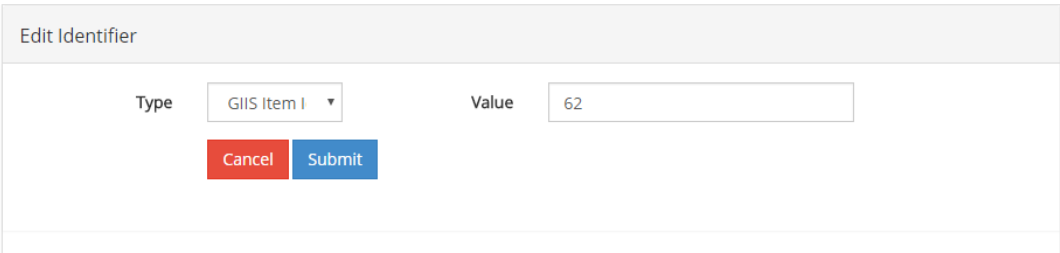
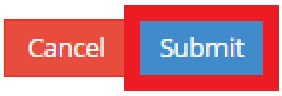


Figure 17.19 - Edit Identifier page

Step 2: In the **Edit Identifier** area:

- Select a **Type** (Required)
- Enter a **Value** for the identifier

Step 3: Press the **Submit** button (See the figure below)



Deleting an Identifier

You can delete identifiers using the **Edit Identifier** page.

Step 1: From the **Edit Place** page, in the **Identifiers** area, click the **Delete** ✖ button next to the identifier you wish to delete (See the figure below)

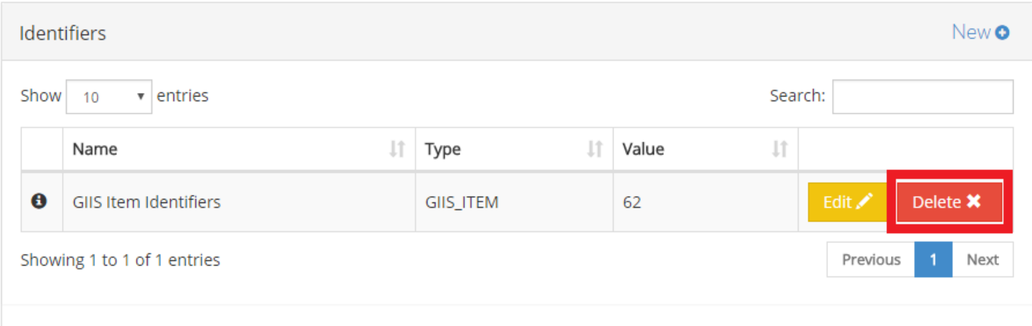


Figure 17.20 - Delete Identifier button

The identifier will be deleted and the **Edit Place** page will be refreshed.

17.5.3 Relationships Area

The **Relationships** area displays a list of all relationships for the place. You are also able to add new relationships and edit or delete existing relationships. Places can have relationships with other places.

Creating a New Relationship: Place

Step 1: From the **Edit Place** page, in the **Relationships** area, click the **New Place** button (See the figure below)

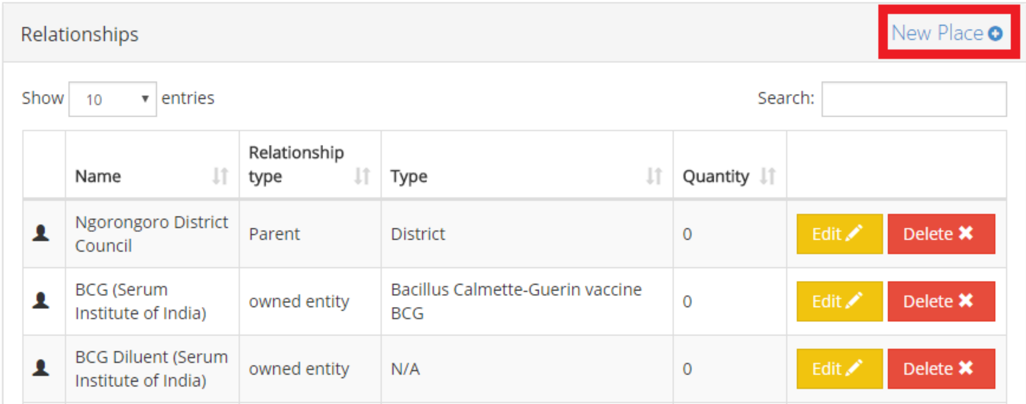


Figure 17.21 - New Place button

You will be brought to the **Create Place** page. Here you can add a new relationship by using the **Create Place** area (See the figure below) and also see the list of current relationships in the **Relationships** area of this page.

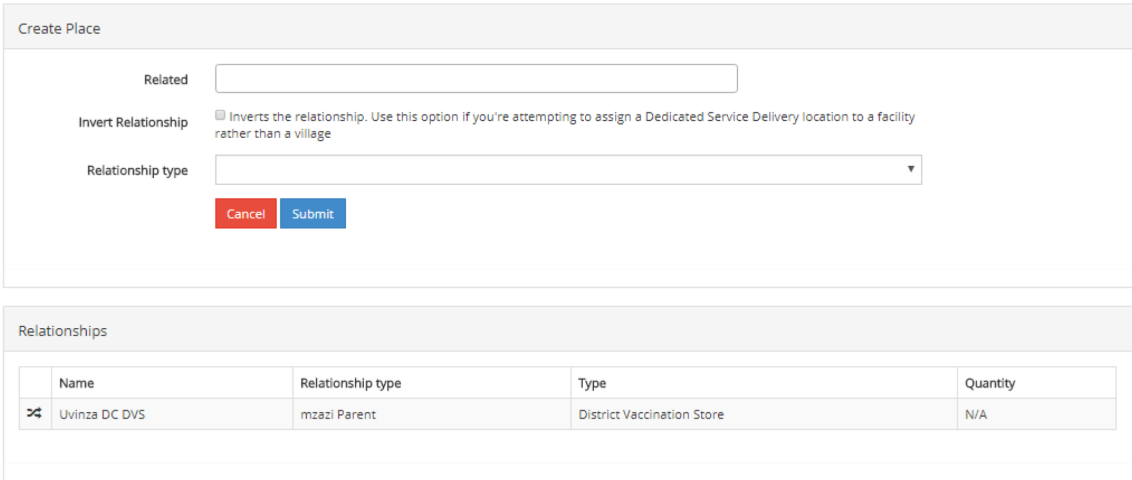


Figure 17.22 - Create Place area

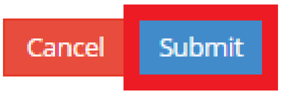
Step 2: In the **Create Place** area, start typing the related places name into the **Related** field

> **Note:** You must enter 4 or more characters to search for a related place

Step 3: Select a relationship type with the **Relationship type** dropdown

Note: Only check off the **Invert Relationship** checkbox if you want to assign a Dedicated Service Delivery location to a facility rather than a village.

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new relationship you will be returned to the **Edit Place** page.

Deleting a Relationship

You can delete relationships using the **Edit Place** page.

Step 1: From the **Edit Place** page, in the **Relationships** area, click the **Delete ✖** button next to the relationship you wish to delete (See the figure below)

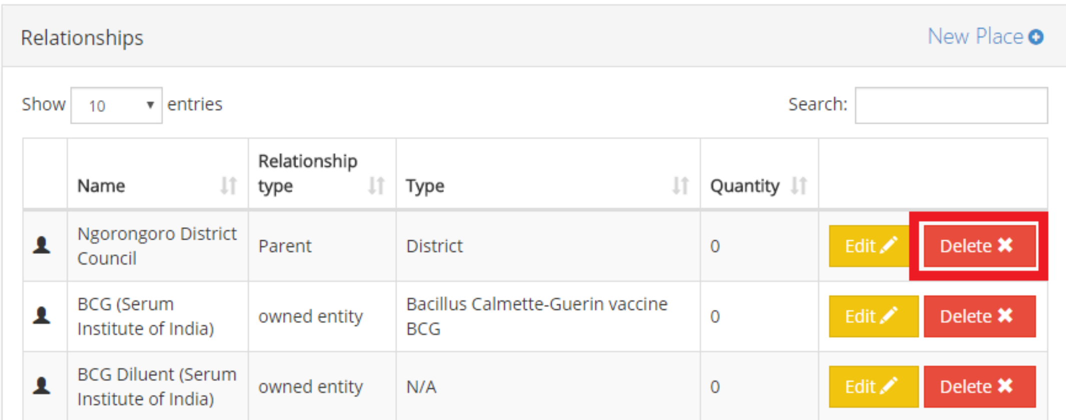


Figure 17.23 - Delete Relationship button

The relationship will be deleted and the **Edit Place** page will be refreshed.

Chapter 18: Policies

The **Policies** page allows you to search for policies, and view or manage them. (See the figure below)

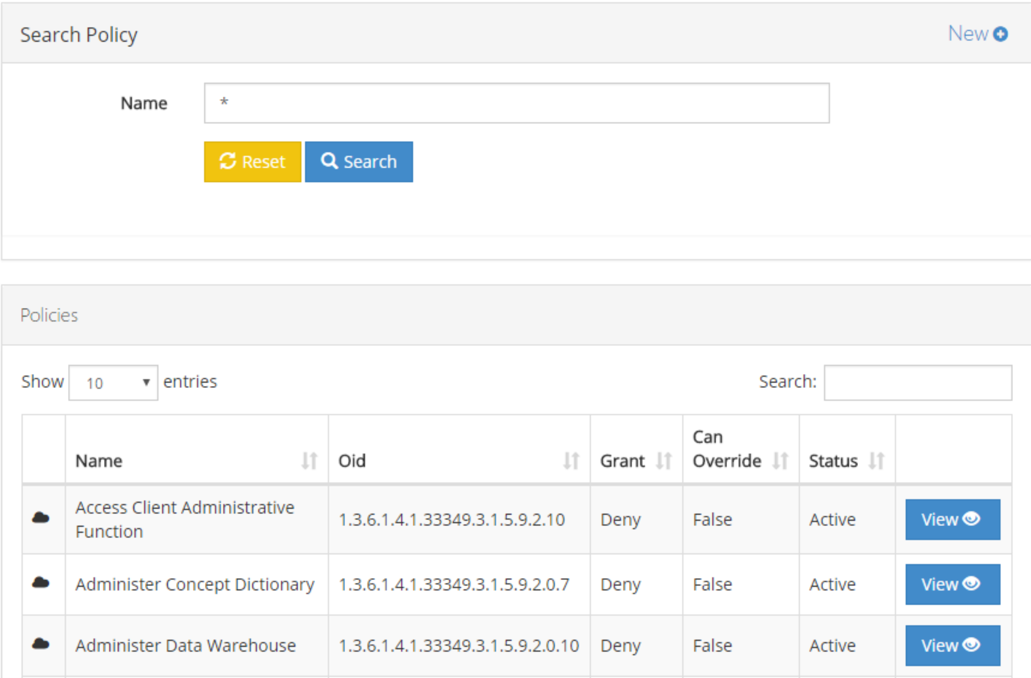


Figure 18.1 - Policies page

18.1 Search Policies

If you are looking for a specific policy that already exists in the system you can use the **Search Policy** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Policy** area, enter the name of a policy (See the figure below)

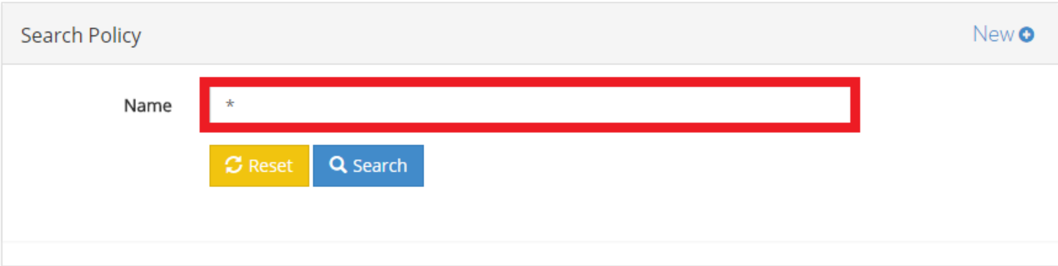
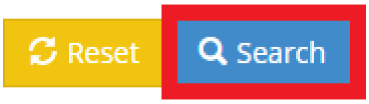


Figure 18.2 - Searching for a Policy

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Policies** area below. See the following section on **Policies** for more information.

18.2 Policies

The **Policies** area of the **Policies** page displays a list of all the policies in the search results. By default the search results load with all policies available. (See the figure below)

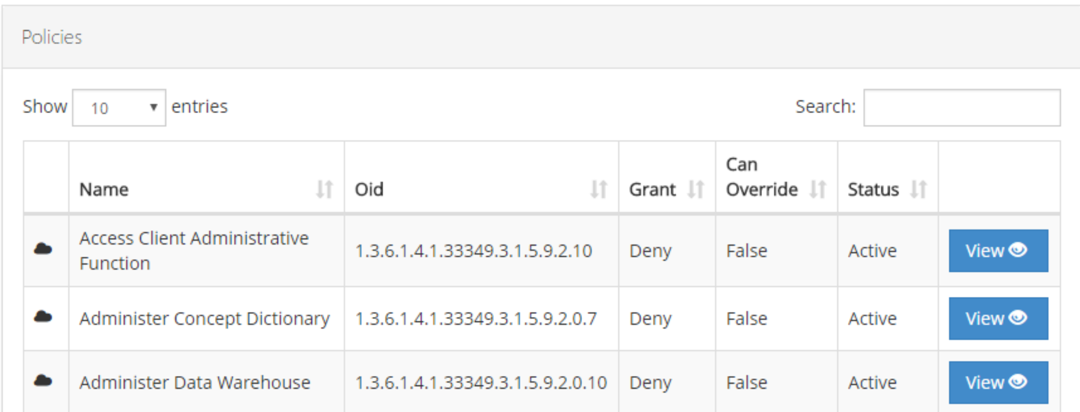


Figure 18.3 - Policies

Policies displayed here list details such as the name, oid (object identifier), grant status, override status and active status. These policies can also be viewed from this page.

New policies can also be added from this page. To add a new policy, or view an existing policy, see sections below.

18.3 New Policy ⊕

When a new policy is required, you can create a new policy. To create a new policy:

Step 1: From the **Policies** page, click the **New** ⊕ button in the top right of the **Search Policy** area (See the figure below)

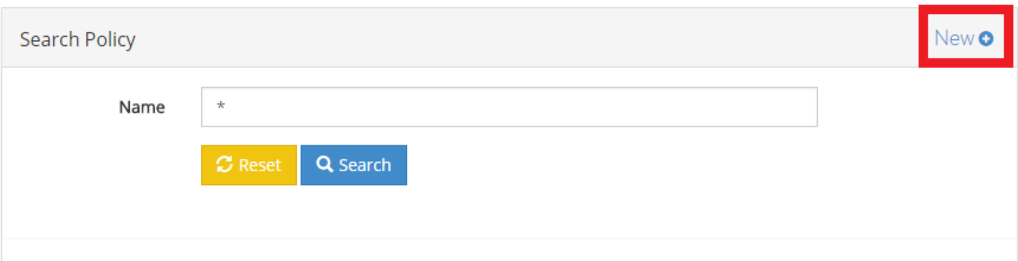


Figure 18.4 - New policy button

Step 2: Fill in the fields for the policy you are adding (See the figure below):

- Name (Required)
- Grants (Required)
- Oid (Required)

  Note: This is the object identifier, this should be a unique value

- Can Override

  Note: Select this if you want this policy to override other policies when attached to an entity

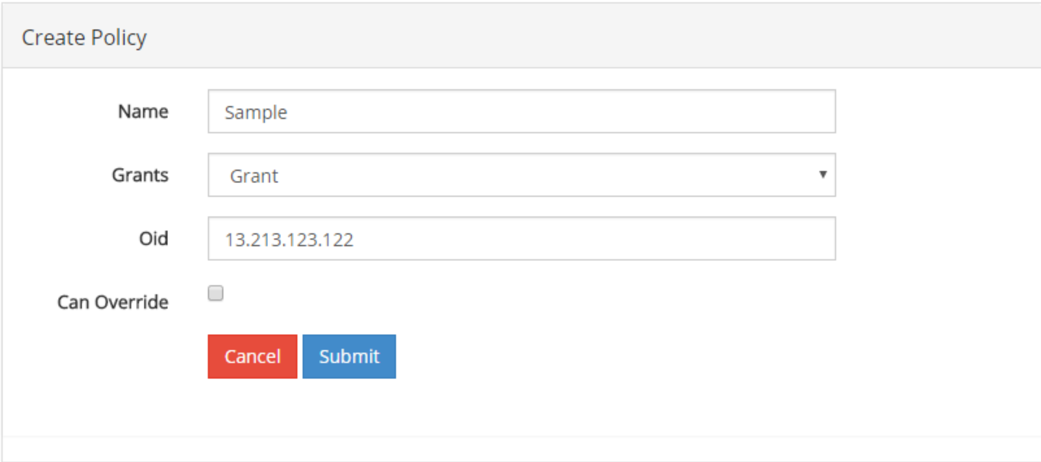
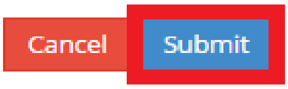


Figure 18.5 - Create Policy page

Step 3: Press the **Submit** button to create the policy (See the figure below)



If created successfully you should see a popup display message saying the Policy created successfully. From here you will see the **View Policy** page. See below for more details on viewing and editing policies.

18.4 View Policies

After finding a policy in the search results, or creating a new policy you can view the policies details.

Step 1: From the **Policies** page, find a policy you would like to view and press the **View** button (See the figure below)

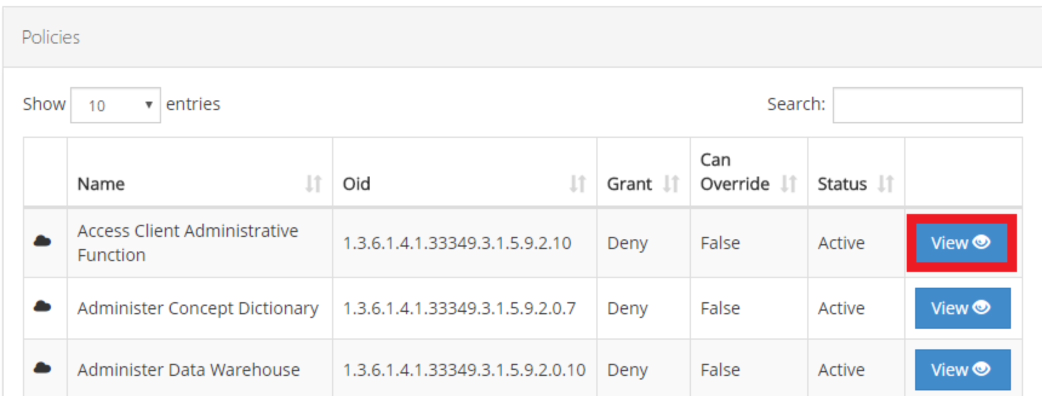


Figure 18.6 - View Policy button

You will be brought to **View Policy** page for the policy you selected to view.

18.4.1 View Policy Area

The **View Policy** area displays the initial information for the policy that was created. Details such as the name, grant status, oid (object identifier) and override status for the policy are displayed in this area. (See the figure below)

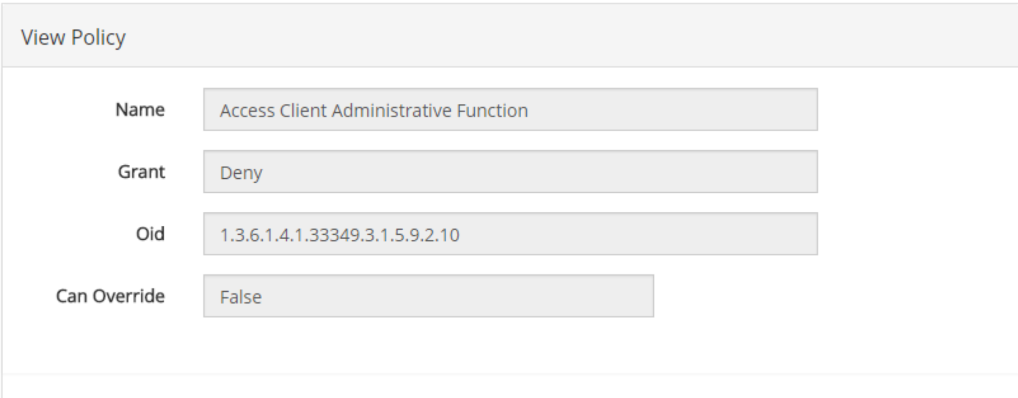


Figure 18.7 - View Policy area

Chapter 19: Realm Management

The OpenIZ Administration portal allows you to manage the realm you are joined to. The Realm Management page will display the current realm you are linked to. (See the figure below)

Warning: Do not leave the current realm without knowing the correct credentials for the new realm (or for the current realm as backup).

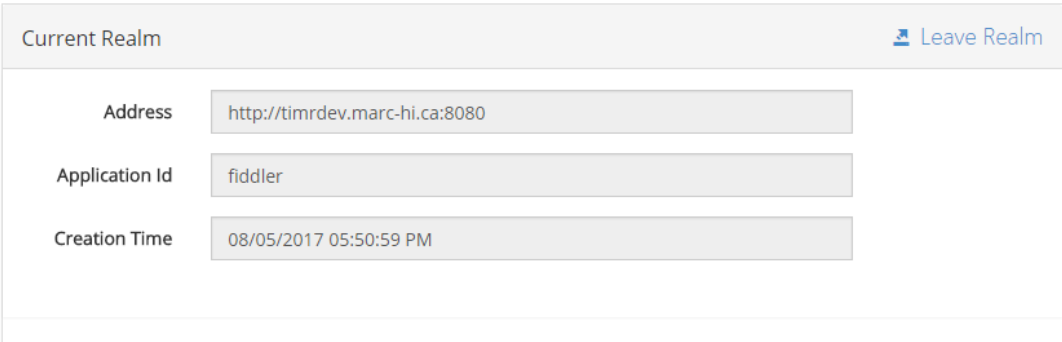


Figure 19.1 - Realm Management - Current Realm

19.1 Leaving a Realm

Before you can join a new realm you first have to leave the current realm. It is important to know the required information for joining a new realm or rejoining the current realm if there is an issue with the new realm. To leave a realm:

Step 1: Click the **Leave Realm** button in the **Current Realm** area (See the figure below)

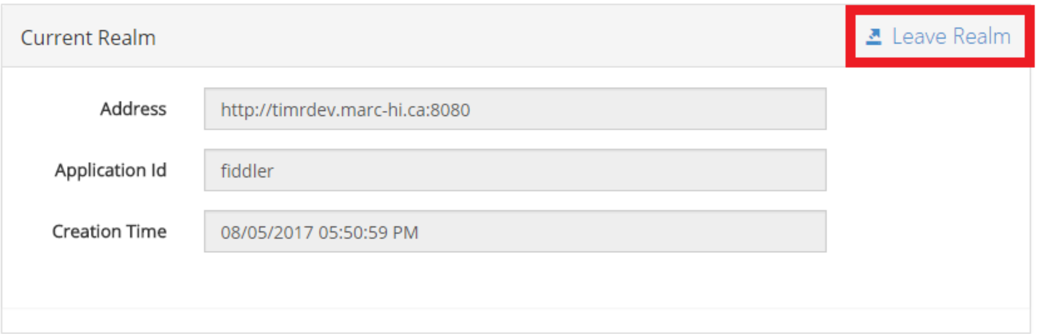


Figure 19.2 - Leave Realm button

A warning box will appear below the **Current Realm** area.

Warning: Do not leave the current realm without knowing the correct credentials for the new realm (or for the current realm as backup).

Step 2: If you are sure you want to leave the realm, press the **Leave Realm** button in the **Leave Realm** area (See the figure below)

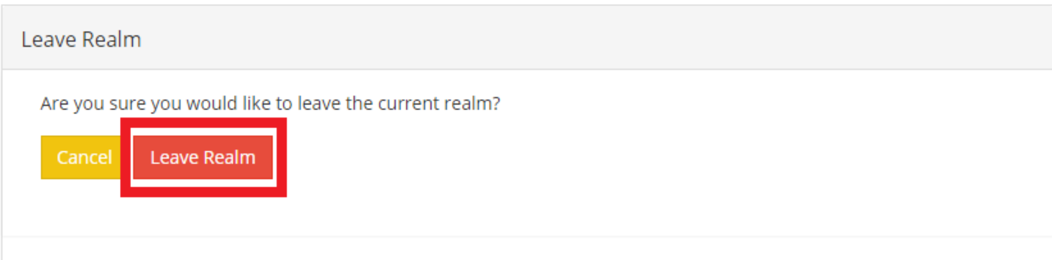


Figure 19.3 - Are you sure? Leave Realm button

The Join Realm page will appear. You have successfully left the current realm. To join a new realm see the section below.

19.2 Joining a Realm

If you are not joined to a realm or just left a realm you will see the **Join Realm** page instead of the **Login** or **Dashboard** pages. You need to join a realm in order to have access to the functionality of the OpenIZ Administration portal.

Step 1: Enter in the details for the realm you are joining (See the figure below):

- Realm Address (Required)
- Application Id (Required)
- Application Secret (Required)
- Username (Required)

  Note: The User credentials must have Administrator level access on the Realm being joined.

- Password (Required)

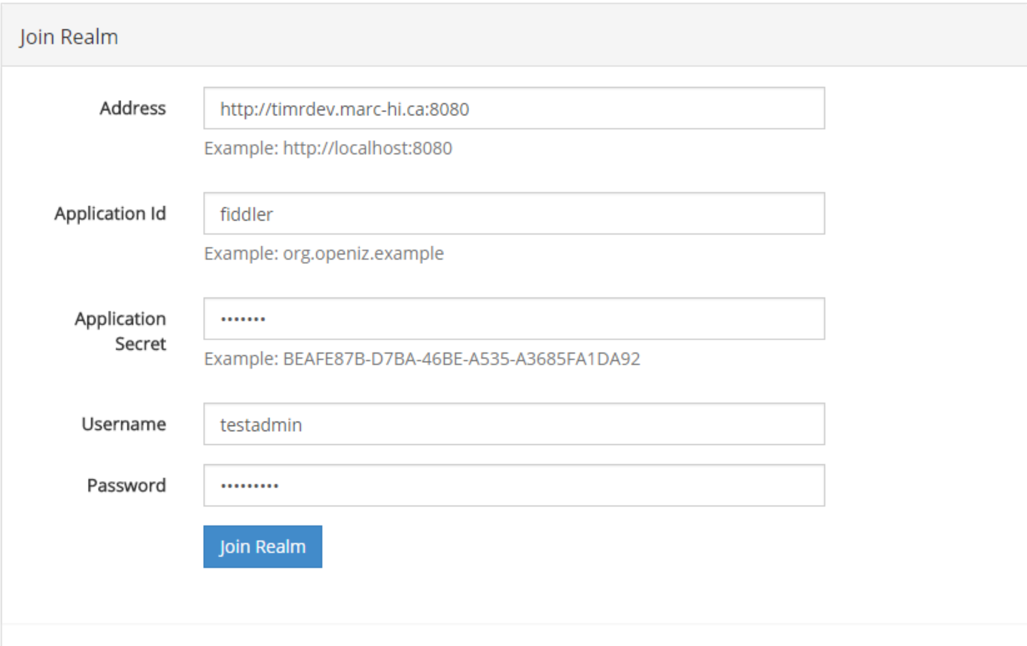


Figure 19.4 - Join Realm

Step 2: Click the **Join Realm** button

You will be brought to the **Login** page on the new realm.

Chapter 20: Reports

The **Reports** page displays a list of reports generated by the system. This page provides download links to download XML document reports. From this page you can also filter the list using the search box. (See the figure below)

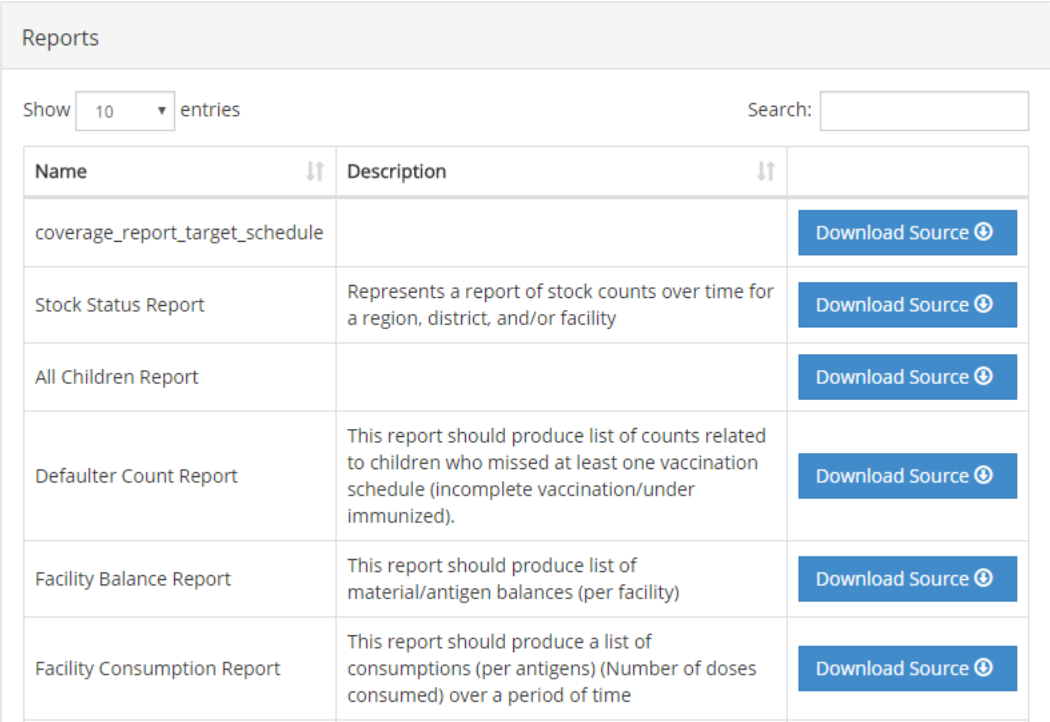


Figure 20.1 - Reports page

20.1 Downloading Reports

You can download reports at any time. To download a specific report:

Step 1: In the **Reports** area, type in a name or a few letters to filter the search results of the reports.

Step 2: Click the **Download Source** button (See the figure below)

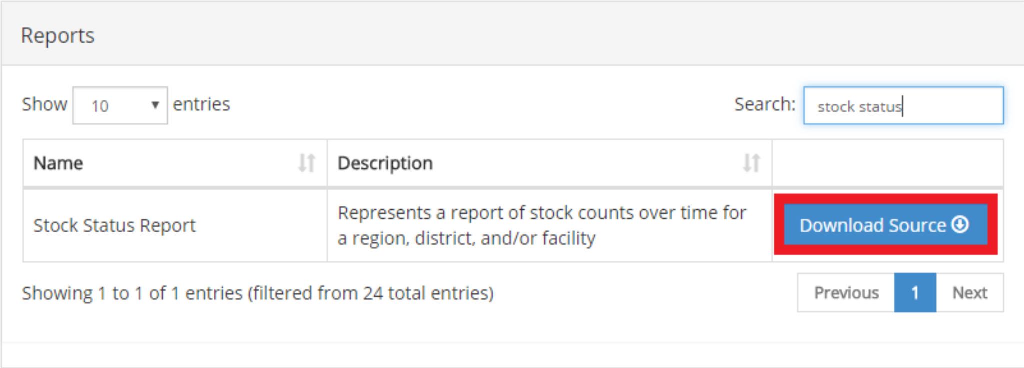


Figure 20.2 - Download Source button

The XML Report will be downloaded to your local drive (usually the Downloads folder)

Chapter 21: Reference Terms

The **Reference Terms** page allows you to search for reference terms, or manually manage reference terms and reference terms. (See the figure below)

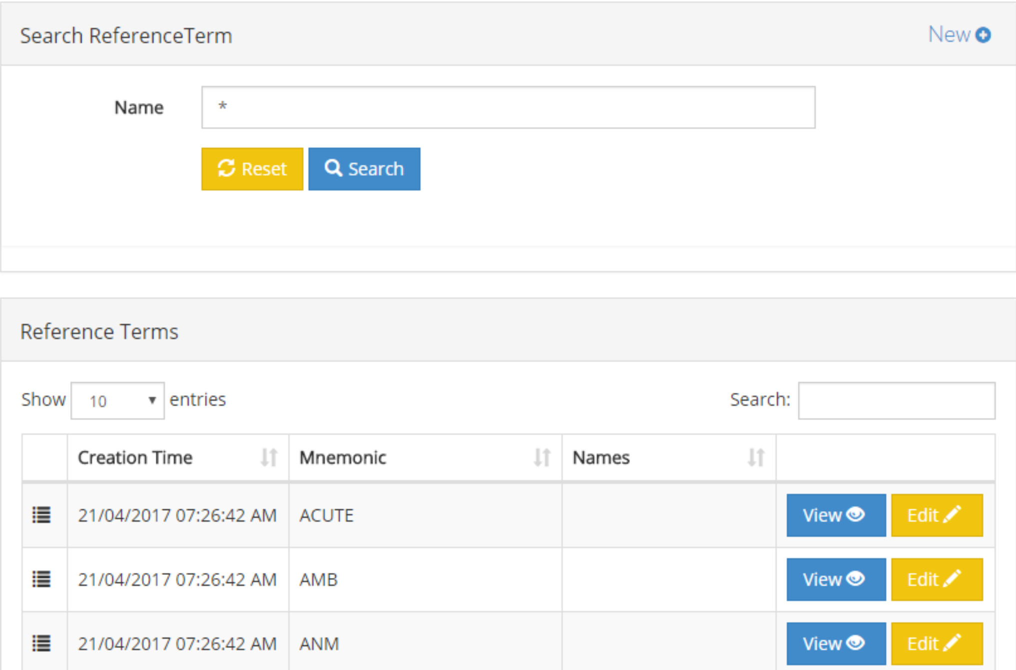


Figure 21.1 - The Reference Terms page

21.1 Search Reference Terms

If you are looking for a specific reference term that already exists in the system you can use the **Search Reference Term** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Reference Term** area, enter the name of the reference term (See the figure below)

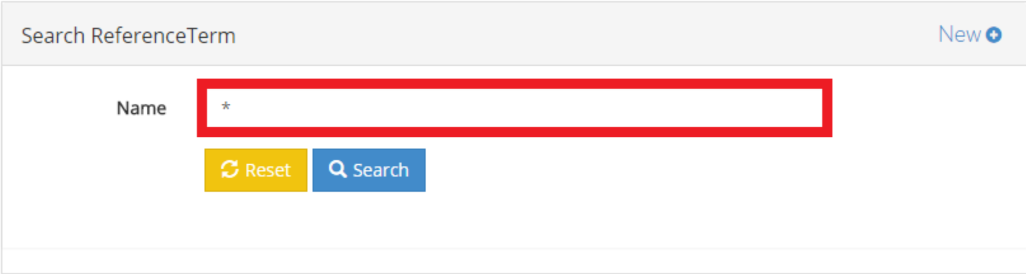
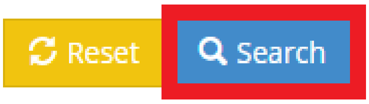


Figure 21.2 - Searching for a Reference Term

Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Reference Term** area below. See the following section on **Reference Terms** for more information.

21.2 Reference Terms

The **Reference Term** area of the **Reference Term** page displays a list of all the reference terms in the search results. By default the search results load with all reference terms available. (See the figure below)

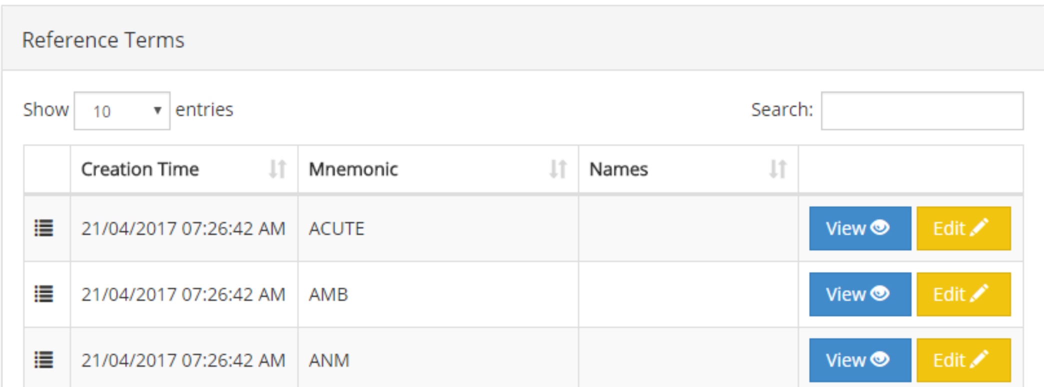


Figure 21.3 - Reference Terms

Reference Terms displayed here show the creation time, mnemonic, and name. Reference terms can be viewed and managed from this page.

New reference terms can also be added from this page. To add a new reference term, or view and manage an existing reference term, see sections below.

21.3 New Reference Term ✪

When a new reference term is needed to be added to the system, you can create a new reference term. To create a new reference term:

Step 1: From the **Reference Term** page, click the **New** ✪ button in the top right of the **Search Reference Term** area (See the figure below)

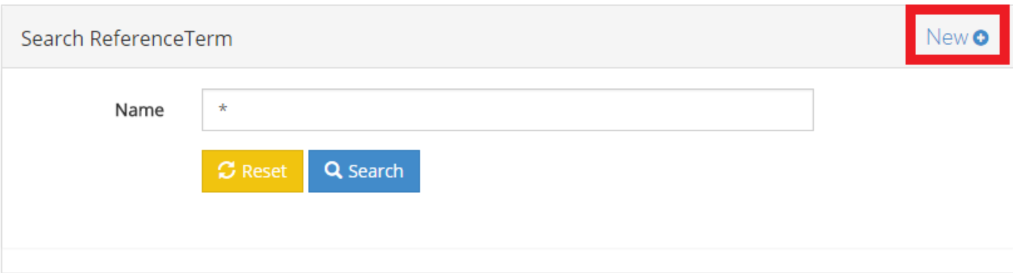


Figure 21.4 - New Reference Term button

Step 2: You will be brought to the **Add Reference Term** page, Enter or select the details for the reference term you are adding (See the figure below):

- Mnemonic (Required)

  Note: This is memorable value for your reference term

- Code System
- Name (Required)
- Language (Required)

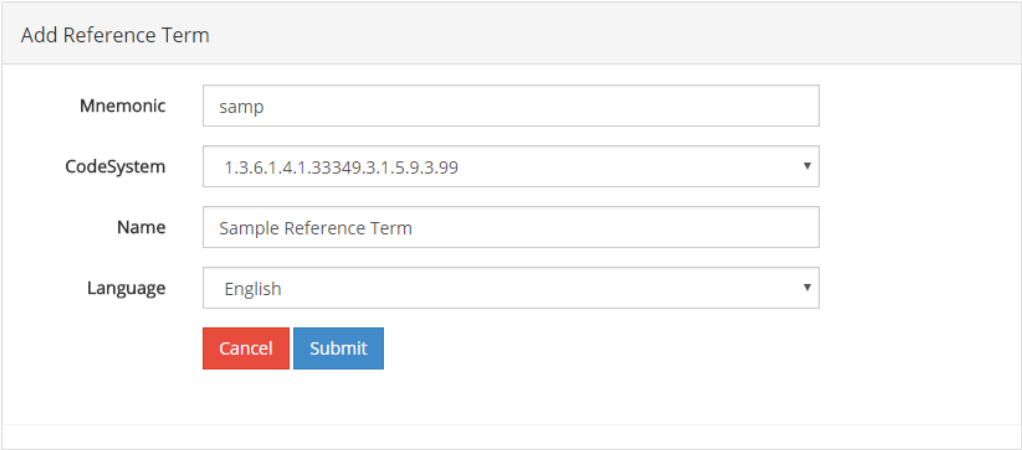
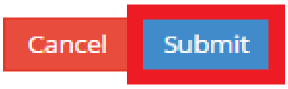


Figure 21.5 - Add Reference Term page

Step 3: Press the **Submit** button to add the reference term (See the figure below)



If created successfully you should see a popup display message saying the *Reference Term created successfully*. From here you will see the **View Reference Term** page. See below for more details on viewing and editing reference terms.

21.4 View Reference Terms ≣

After finding a reference term in the search results, or after creating a new reference term you can view the reference term’s details.

Step 1: From the **Reference Terms** page, find a reference term you would like to view and press the **View** button (See the figure below)

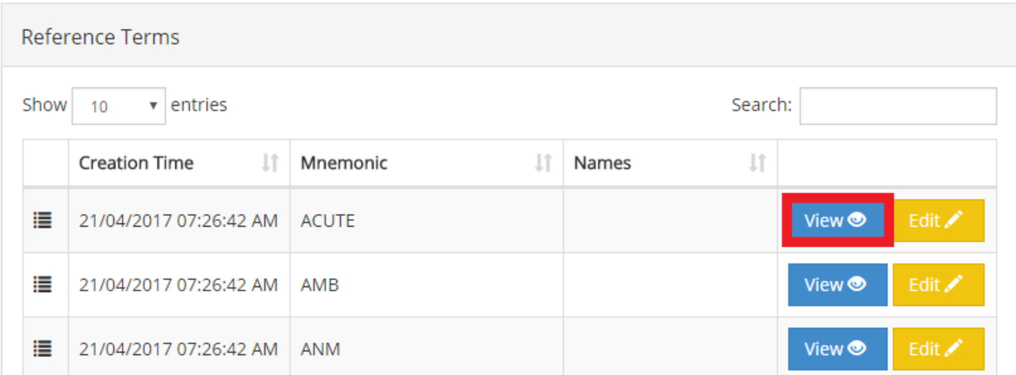


Figure 21.6 - View Reference Term button

You will be brought to **View Reference Term** page for the reference term you selected to view. The **View Reference Term** page displays the initial information for the reference term, as well as related reference term names and their languages. (See the figure below)

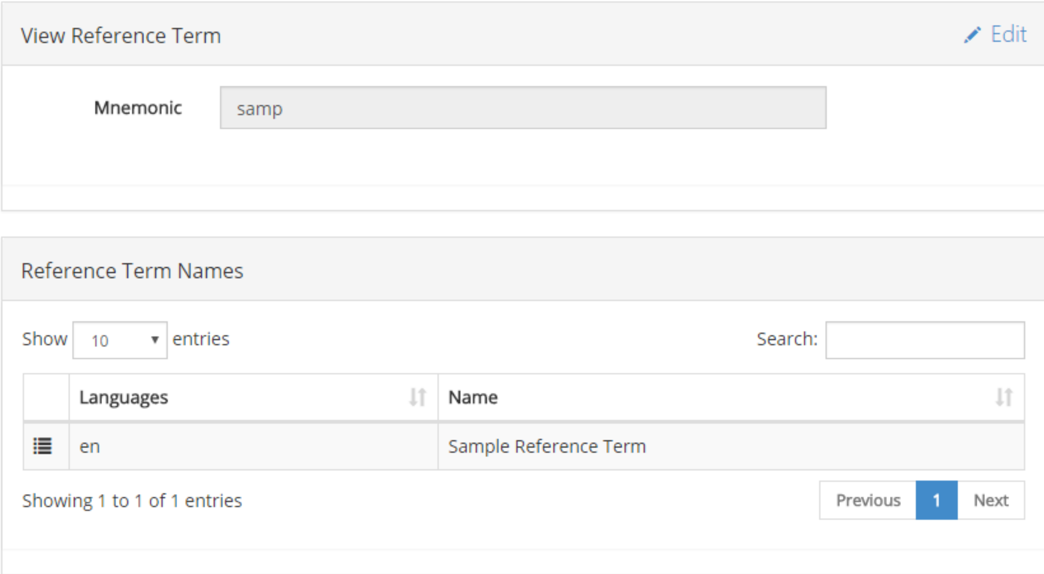


Figure 21.7 - View Reference Term page

21.4.1 View Reference Term Area

The **View Reference Term** area displays the initial mnemonic for the reference term that was created. (See the figure below)

Figure 21.8 - View Reference Term area

21.4.2 Reference Term Names Area

The **Reference Term Names** area displays a list of all reference term names and their languages for the reference term being viewed. (See the figure below)

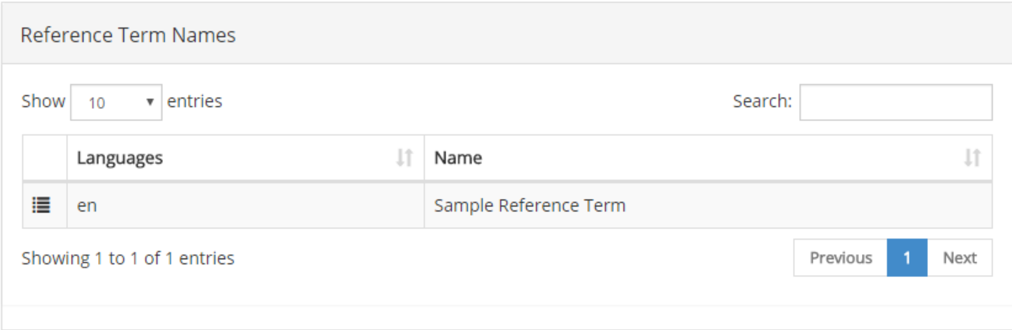


Figure 21.9 - Reference Term Names area

21.5 Edit Reference Term ≣

Each reference term has several components that can be edited. You can change the initial details and add or change reference term names.

To access the **Edit Reference Term** page from the **Reference Terms** page:

Step 1: Find a reference term using the search bar and click the **Edit** ✎ button (See the figure below)

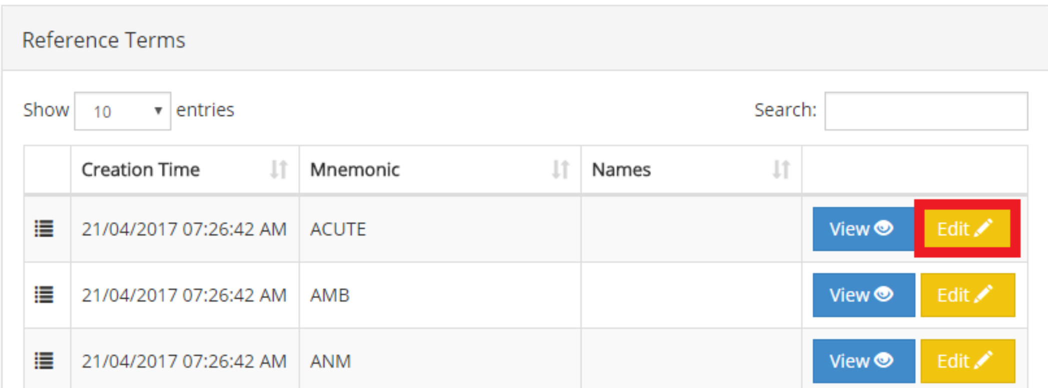


Figure 21.10 - Edit Reference Term from the Reference Terms page

To access the **Edit Reference Term** page from the **View Reference Term** page:

Step 1: Click the **Edit** ✎ button (See the figure below)

Figure 21.11 - Edit Reference Term from the View Reference Term page

You will be brought to **Edit Reference Term** page for the reference term you selected to edit. From this page you can modify fields and add/edit/remove reference term names.

21.5.1 Edit Reference Term Area

In this area you can change the mnemonic set for the reference term you are viewing. *Required fields: Mnemonic.* (See the figure below)

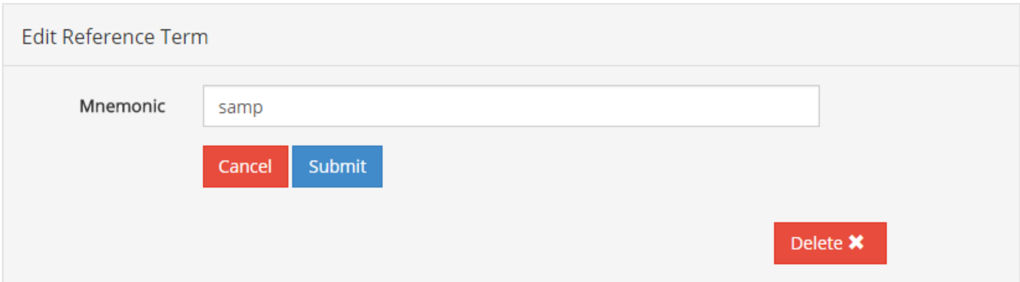


Figure 21.12 - Edit Reference Term page

21.5.2 Reference Term Name Area

The **Reference Term Name** area displays a list of all reference term names for the reference term. You are also able to add new reference term names and edit or delete existing reference term names.

Creating a Reference Term Name

Step 1: From the **Edit Reference Term** page, in the **Reference Term Name** area, click the **New** button (See the figure below)

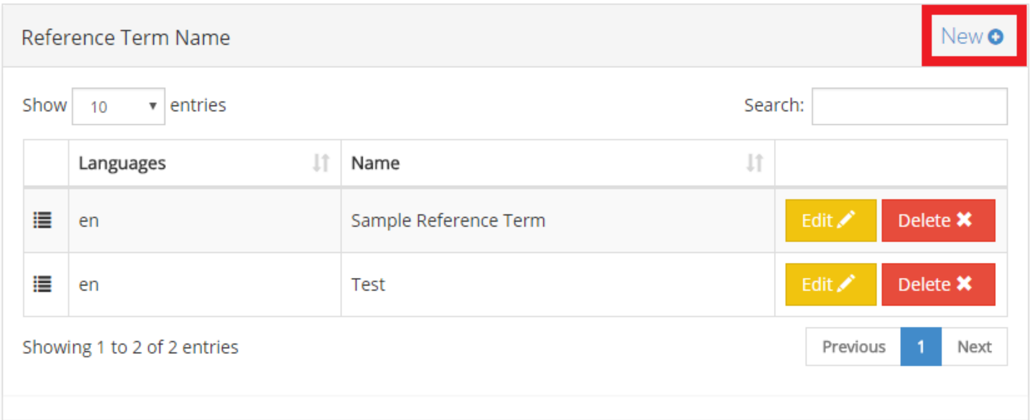


Figure 21.13 - New Reference Term Name button

You will be brought to the **Add Reference Term Name** page. Here you can add a reference term name by using the **Add Reference Term Name** area (See the figure below) and also see the list of current reference term names in the **Reference Term Names** area of this page.

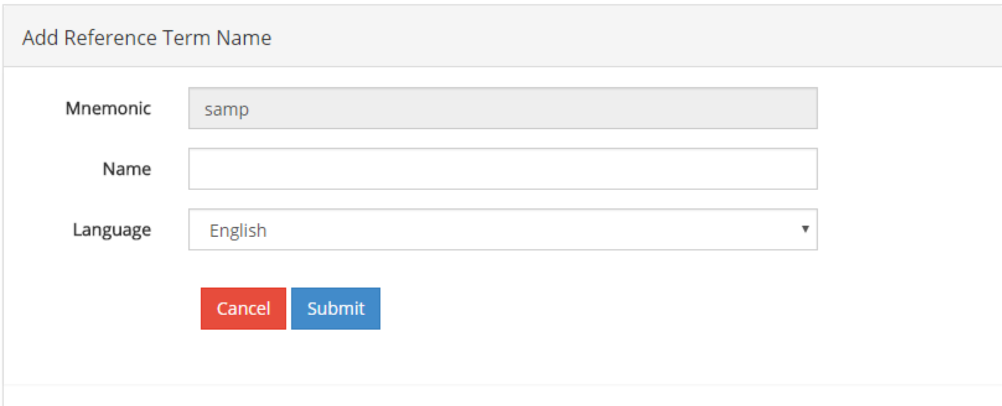
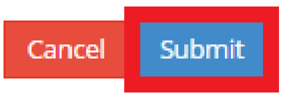


Figure 21.14 - Add Reference Term Name page

Step 2: In the **Add Reference Term Name** area:

- Enter a **Name** (Required)
- Select a **Language** (Required)

Step 3: Press the **Submit** button (See the figure below)



Upon creation of a new reference term name you will be returned to the **Edit Reference Term** page.

Editing a Reference Term Name

You can view and edit existing reference term names using the **Edit Reference Term** page.

Step 1: From the **Edit Reference Term** page, in the **Reference Term Name** area, click the **Edit** button next to the reference term name you wish to edit (See the figure below)

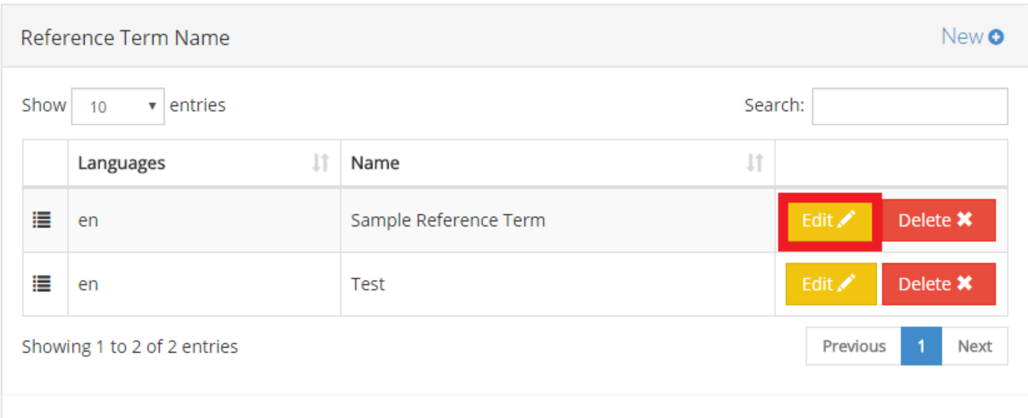


Figure 21.15 - Edit Reference Term Name button

You will be brought to the **Edit Reference Term Name** page. Here you can edit the reference term name by using the **Edit Reference Term Name** area (See the figure below) and also see the list of current reference term names and their languages in the **Reference Term Names** area of this page.

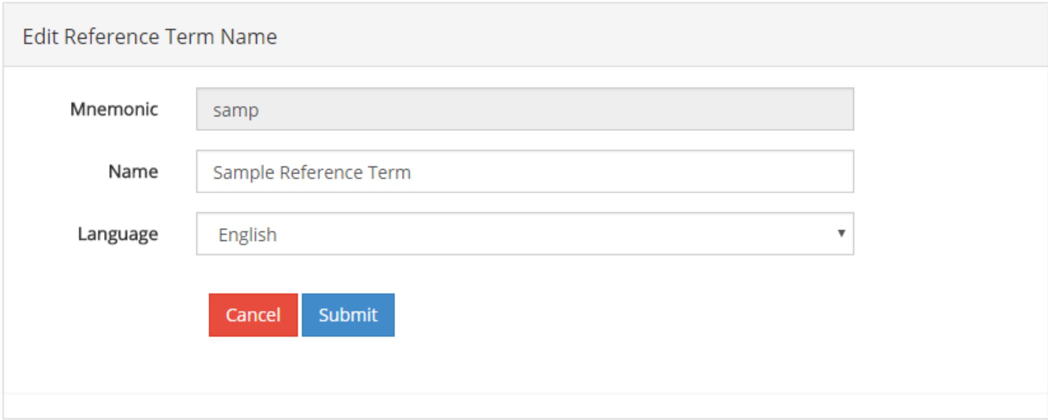
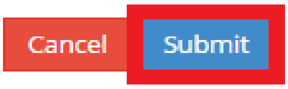


Figure 21.16 - Edit Reference Term Name page

Step 2: In the **Edit Reference Term Name** area:

- Enter a **Name** (Required)
- Select a **Language** (Required)

Step 3: Press the **Submit** button (See the figure below)



You will be returned to the **Edit Reference Term** page.

Deleting a Reference Term Name

You can delete reference term names by using the **Edit Reference Term** page.

Step 1: From the **Edit Reference Term** page, in the **Reference Term Names** area, click the **Delete** ✖ button next to the reference term name you wish to delete (See the figure below)

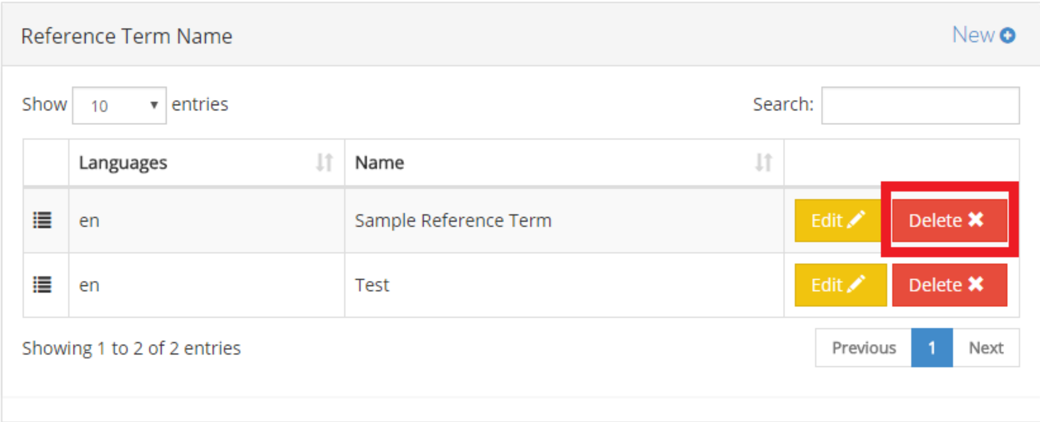


Figure 21.17 - Delete Reference Term Name button

The reference term name will be deleted and the **Edit Reference Term** page will be refreshed.

Chapter 22: Roles

The **Roles** page allows you to search for roles, or manually manage roles and their relationships (policies). (See the figure below)

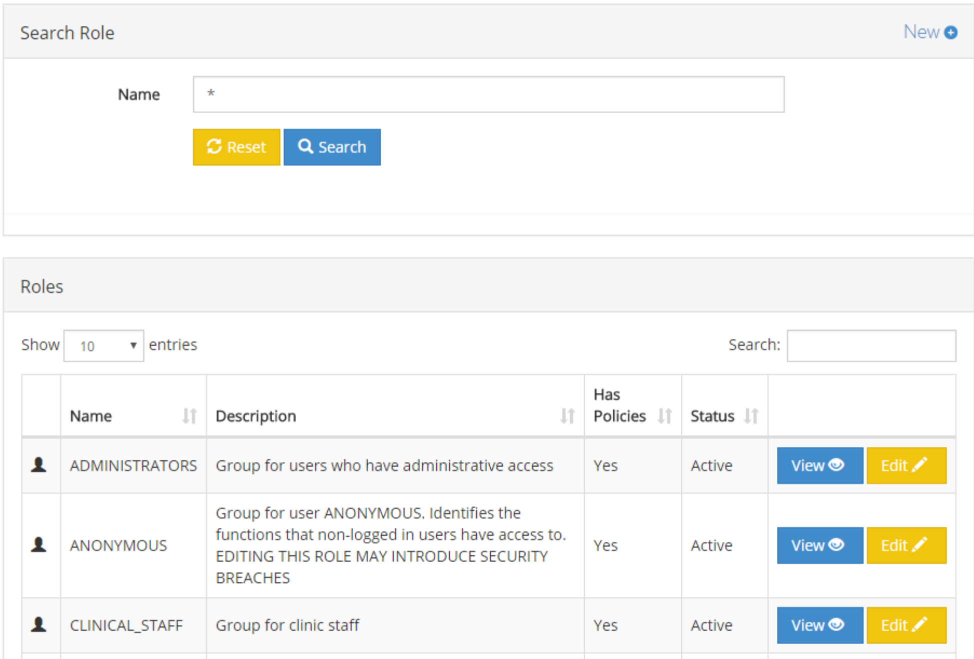


Figure 22.1 - Roles page

22.1 Search Roles

If you are looking for a specific role that already exists in the system you can use the **Search Role** area of the page.

An input of some kind is required in order to run a search. You can search for a wildcard by using the * symbol. This will return all the results.

Step 1: In the **Name** field of the **Search Role** area, enter the name of a role (See the figure below)

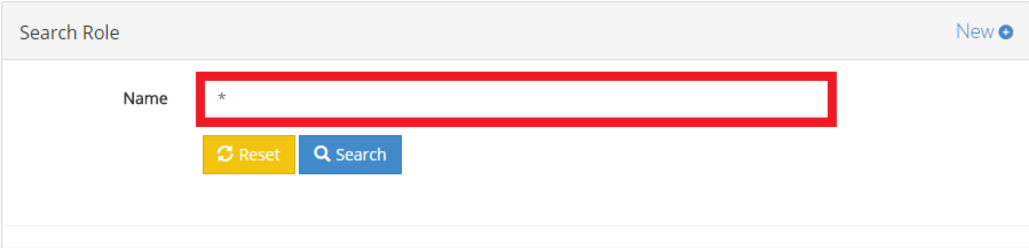
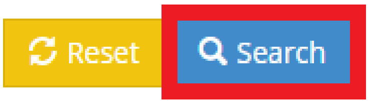


Figure 22.2 - Searching for a Role

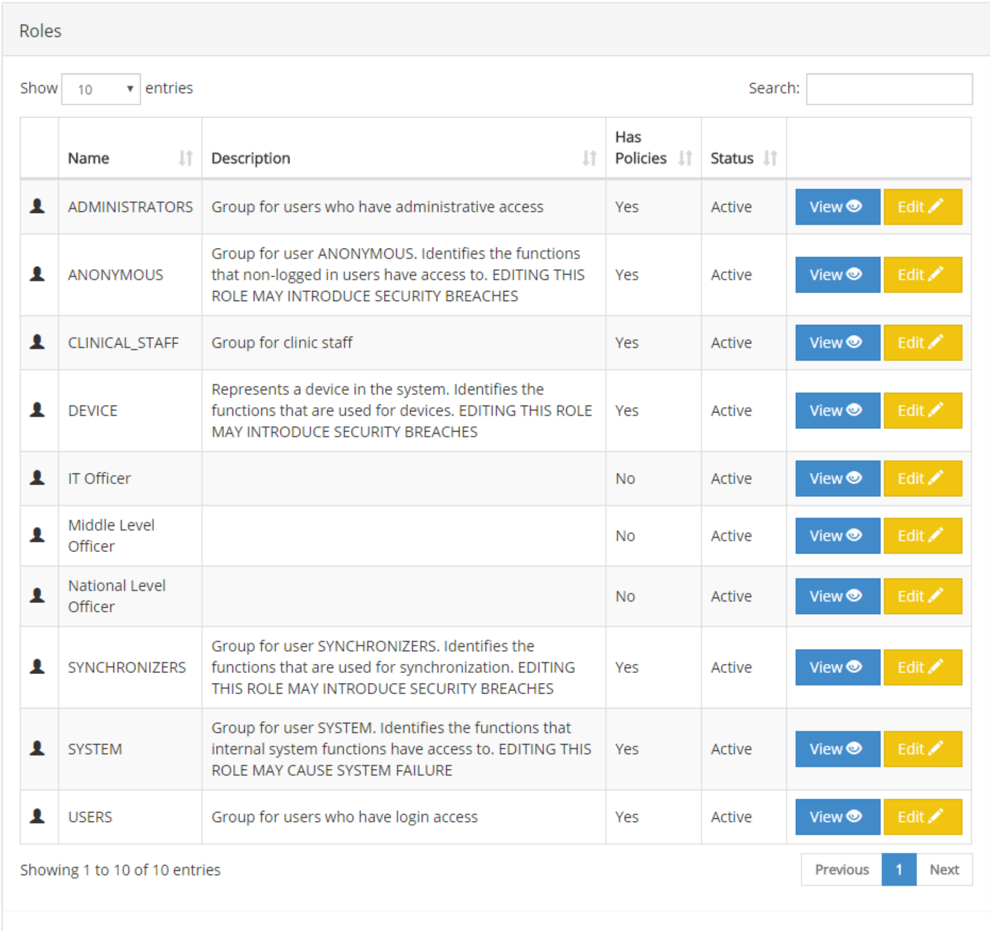
Step 2: Click the **Search** button (See the figure below)



Search results will appear in the **Roles** area below. See the following section on **Roles** for more information.

22.2 Roles

The **Roles** area of the **Roles** page displays a list of all the roles in the search results. By default the search results load with all roles available. (See the figure below)



Roles

Show 10 entries Search:

	Name	Description	Has Policies	Status	
	ADMINISTRATORS	Group for users who have administrative access	Yes	Active	View Edit
	ANONYMOUS	Group for user ANONYMOUS. Identifies the functions that non-logged in users have access to. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	CLINICAL_STAFF	Group for clinic staff	Yes	Active	View Edit
	DEVICE	Represents a device in the system. Identifies the functions that are used for devices. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	IT Officer		No	Active	View Edit
	Middle Level Officer		No	Active	View Edit
	National Level Officer		No	Active	View Edit
	SYNCHRONIZERS	Group for user SYNCHRONIZERS. Identifies the functions that are used for synchronization. EDITING THIS ROLE MAY INTRODUCE SECURITY BREACHES	Yes	Active	View Edit
	SYSTEM	Group for user SYSTEM. Identifies the functions that internal system functions have access to. EDITING THIS ROLE MAY CAUSE SYSTEM FAILURE	Yes	Active	View Edit
	USERS	Group for users who have login access	Yes	Active	View Edit

Showing 1 to 10 of 10 entries Previous 1 Next

Figure 22.3 - Roles

Roles displayed here show details such as the name, description, policy status and active status. Roles can be viewed and managed from this page.

New roles can also be added from this page. To add a new role, or view and manage an existing role, see sections below.

22.3 New Role ✪

When a new role is required, you can create a new role with specific policies limiting the power they have within the system. To create a new role:

Step 1: From the **Roles** page, click the **New** ✪ button in the top right of the **Search Role** area (See the figure below)

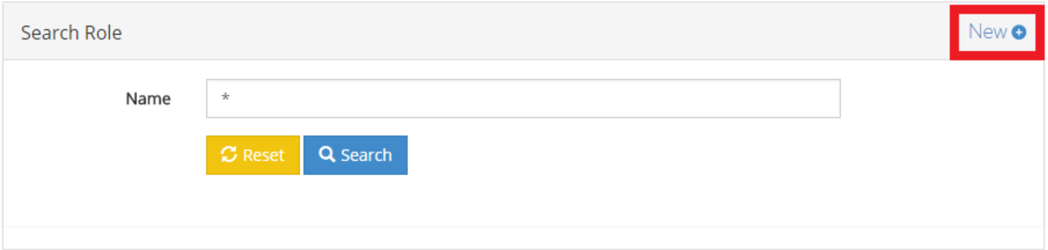


Figure 22.4 - New role button

Step 2: Fill in the fields for the role you are adding (See the figure below):

- Name (Required)
- Description

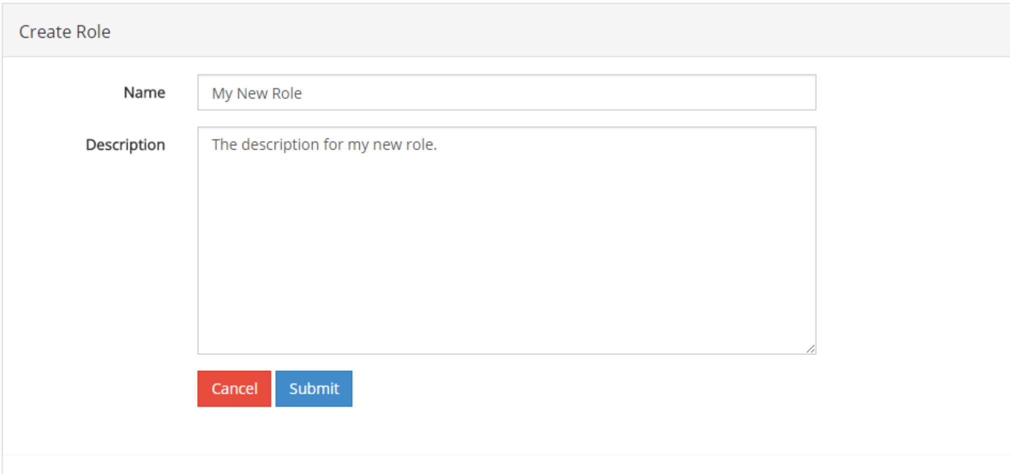
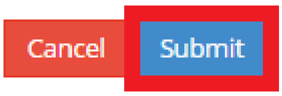


Figure 22.5 - Create Role page

Step 3: Press the **Submit** button to create the role (See the figure below)



If created successfully you should see a popup display message saying the role created successfully. From here you will see the **View Role** page. See below for more details on viewing and editing roles.

22.4 View Role

After finding a role in the search results, or creating a new role you can view the roles details.

Step 1: From the **Roles** page, find a role you would like to view and press the **View** 👁 button (See the figure below)

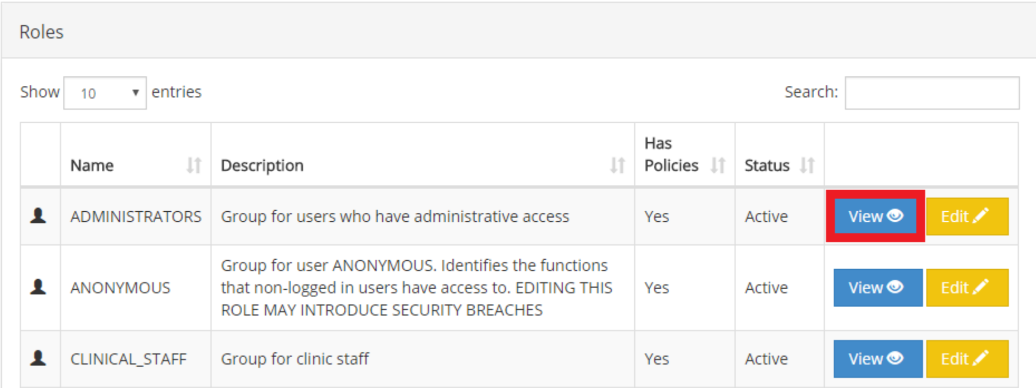


Figure 22.6 - View Role button

You will be brought to **View Role** page for the role you selected to view.

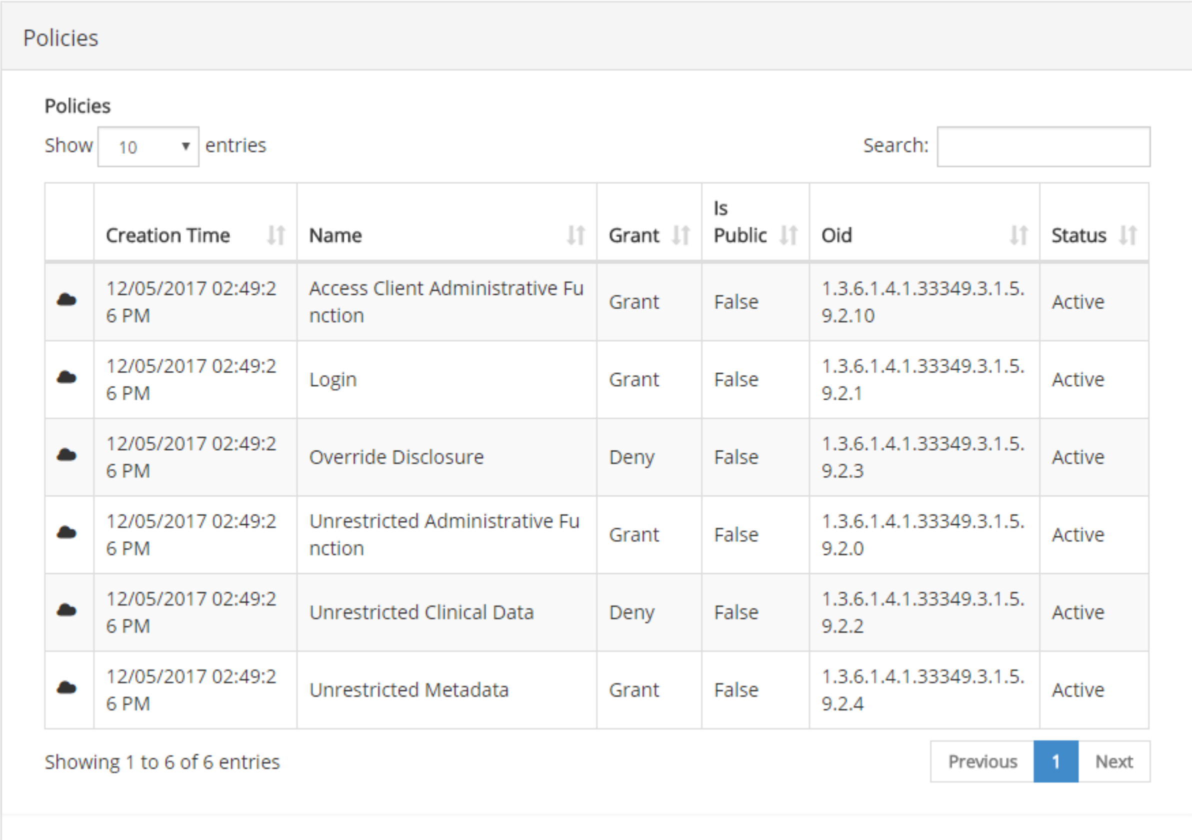
22.4.1 View Role Area

The **View Role** area displays the initial information for the role that was created. The name and description for the role are displayed in this area. (See the figure below)

Figure 22.7 - View Role area

22.4.2 Policies Area ☁

The **Policies** area displays a list of **Policies** ☁ related to the Role. Details such as the creation time, name, grant status, public status, oid (object identifier) and active status are all visible for each policy listed. (See the figure below)



Policies

Policies

Show 10 entries Search:

	Creation Time	Name	Grant	Is Public	Oid	Status
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	12/05/2017 02:49:26 PM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	12/05/2017 02:49:26 PM	Unrestricted Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	12/05/2017 02:49:26 PM	Unrestricted Clinical Data	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active
	12/05/2017 02:49:26 PM	Unrestricted Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4	Active

Showing 1 to 6 of 6 entries Previous 1 Next

Figure 22.8 - Policies area

22.5 Edit Role

Each role has several components that can be edited. You can change the initial details, change policies and view current policies

To access the **Edit Role** page from the **Role** page:

Step 1: Find a role using the search bar and click the **Edit** button (See the figure below)

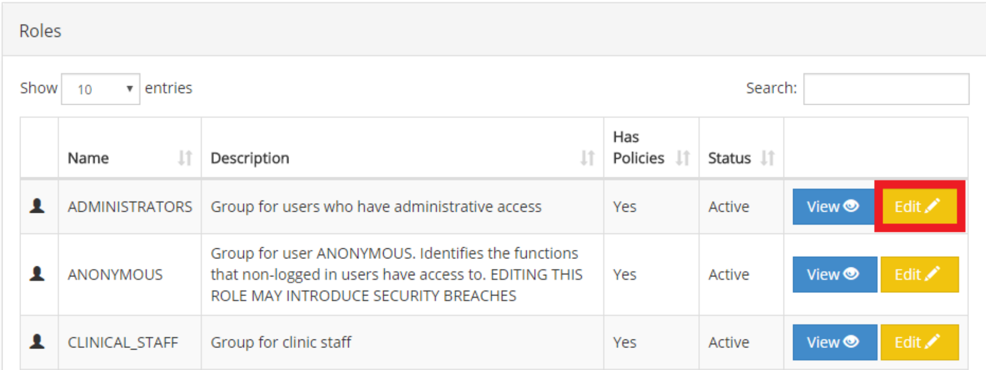


Figure 22.9 - Edit Role from the Roles page

To access the **Edit Role** page from the **View Role** page:

Step 1: Click the **Edit** ✎ button (See the figure below)

Figure 22.10 - Edit Role from the View Role page

You will be brought to **Edit Role** page for the role you selected to edit. From this page you can modify fields and add or remove policies.

22.5.1 Edit Role Area

In this area you can change all the basic values set for the role you are viewing. *Required fields: Name.* (See the figure below)

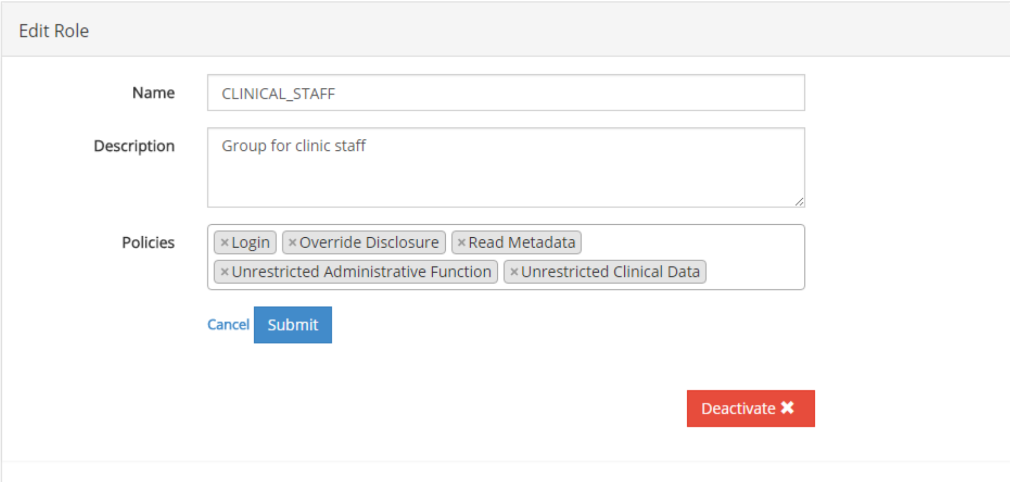


Figure 22.11 - Edit Role area

If the role being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This Role Is Not Active*. To activate or deactivate a role, see the sections below.

Deactivating a Role ✖

In this area you can deactivate the role. Once deactivated, the role cannot be modified or used anywhere in the system until reactivated. To deactivate a role:

Step 1: From the **Edit Role** page, click the red **Deactivate ✖** button in the **Edit Role** area (See the figure below)

You will see a message popup stating *Role successfully deactivated* and you will be returned to the **Search & View Roles** page.

Activating a Role

If a role has been deactivated it can be reactivated in the **Edit Role** page. Once activated, the role can again be modified or used in the system until deactivated. To activate a role:

Step 1: From the **Edit Role** page, click the green **Activate** button in the **Edit Role** area (See the figure below)

You will see a message popup stating *Role successfully activated* and you will be returned to the **Search & View Roles** page.

Adding Policies

You are able to modify available policies in the **Edit Role** area of the **Edit Role** page. You can add multiple policies to a role to give that role more functionality throughout the system. To add a policy to a role:

Step 1: Click on an empty part of the **Policies** field (See the figure below)

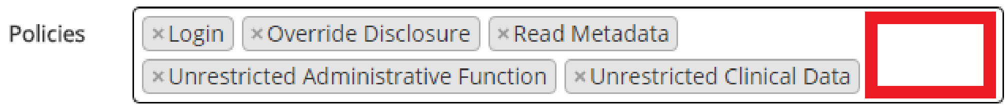


Figure 22.12 - Adding policies

Step 2: A drop-down menu will appear with available policies, select a policy (See the figure below)

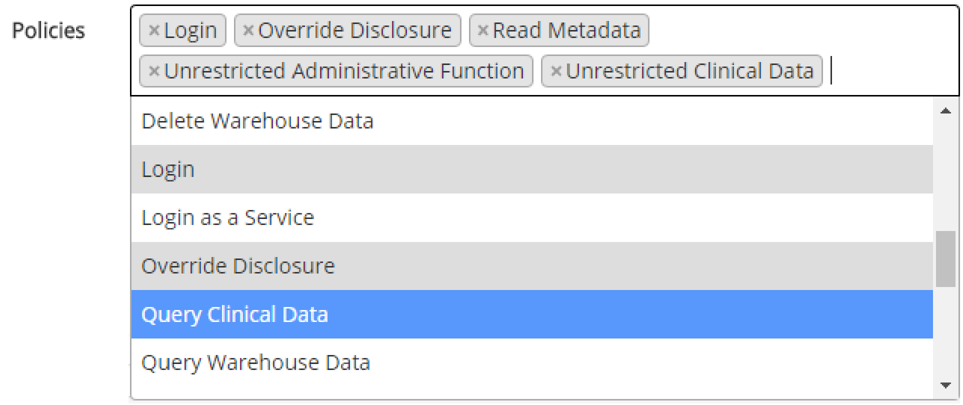
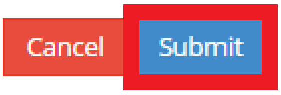


Figure 22.13 - Adding policies - Drop-down menu

Step 3: Repeat the previous steps to add more policies

Step 4: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Role** page. The **Policies** area will be updated with the changes in policies for that role.

Removing Policies

You are able to modify available policies in the **Edit Role** area of the **Edit Role** page. You can restrict access for specific roles by removing some policies that exist for that role. To remove a policy from a role:

Step 1: Click on the ✖ next to the name of a policy in the **Policies** field that you want to remove (See the figure below)

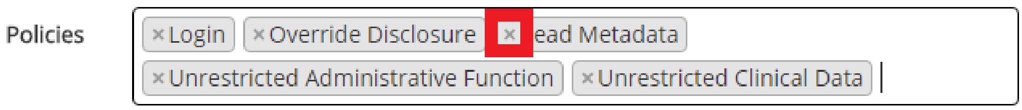
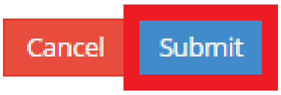


Figure 22.14 - Remove policies

Step 2: Repeat the previous step to remove another policy

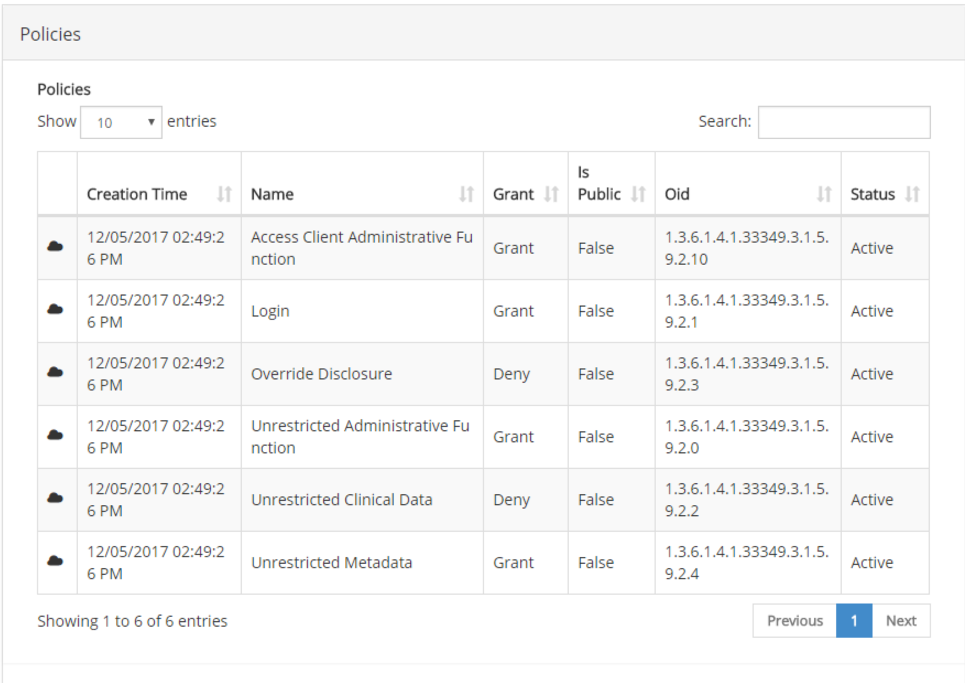
Step 3: Once you have modified the policies, press the **Submit** button (See the figure below)



You will be returned to the **View Role** page The **Policies** area will be updated with the changes in policies for that role.

22.5.2 Policies Area

The **Policies** area displays a list of **Policies** related to the Role you are editing. The creation time, name, grant status, public status, oid (object identifier) and active status are all visible for each policy listed. If the policy list is very large there is a search bar that allows you to filter results. (See the figure below)



Policies

Policies

Show 10 entries

Search:

	Creation Time	Name	Grant	Is Public	Oid	Status
	12/05/2017 02:49:26 PM	Access Client Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.10	Active
	12/05/2017 02:49:26 PM	Login	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.1	Active
	12/05/2017 02:49:26 PM	Override Disclosure	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.3	Active
	12/05/2017 02:49:26 PM	Unrestricted Administrative Function	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.0	Active
	12/05/2017 02:49:26 PM	Unrestricted Clinical Data	Deny	False	1.3.6.1.4.1.33349.3.1.5.9.2.2	Active
	12/05/2017 02:49:26 PM	Unrestricted Metadata	Grant	False	1.3.6.1.4.1.33349.3.1.5.9.2.4	Active

Showing 1 to 6 of 6 entries

Previous 1 Next

Figure 22.15 – Policies area

Chapter 23: Users

The **Users** page allows you to search for users, or manually manage users and their roles. (See the figure below)

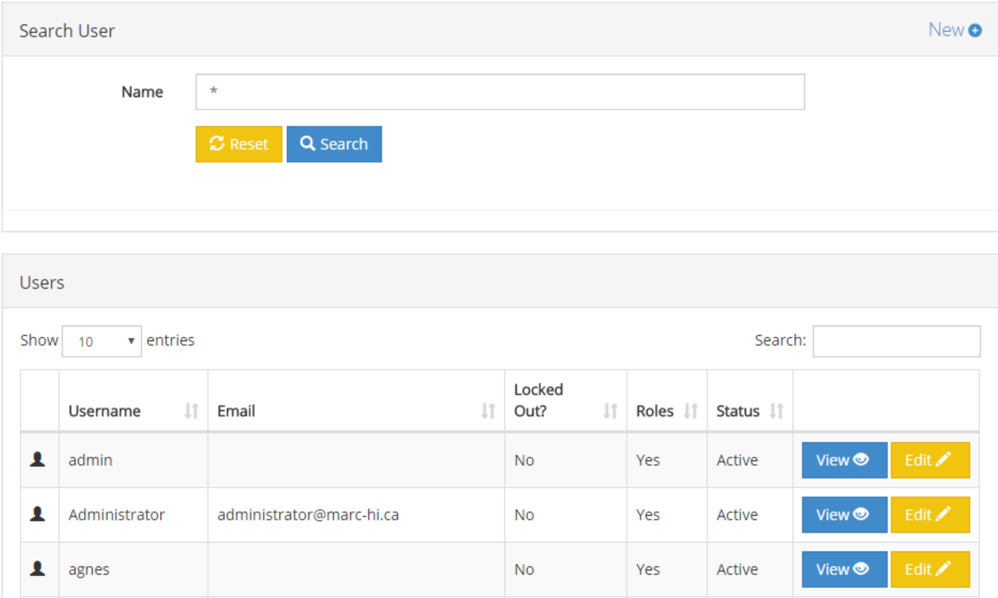


Figure 23.1 - Users page

23.1 Search Users

If you are looking for a specific user that already exists in the system you can use the **Search User** area of the page.

An input of some kind is required in order to run a search. You can search for all users by using the * symbol. This will return all results.

Step 1: In the **Name** field of the **Search User** area, enter the name of a user (See the figure below)

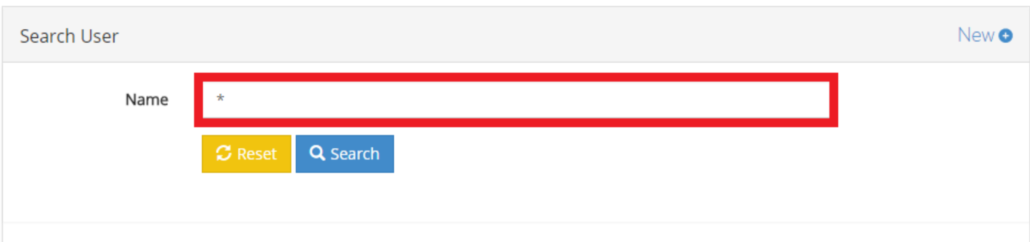
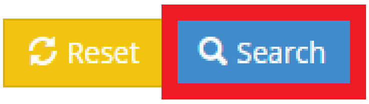


Figure 23.2 - Searching for a User

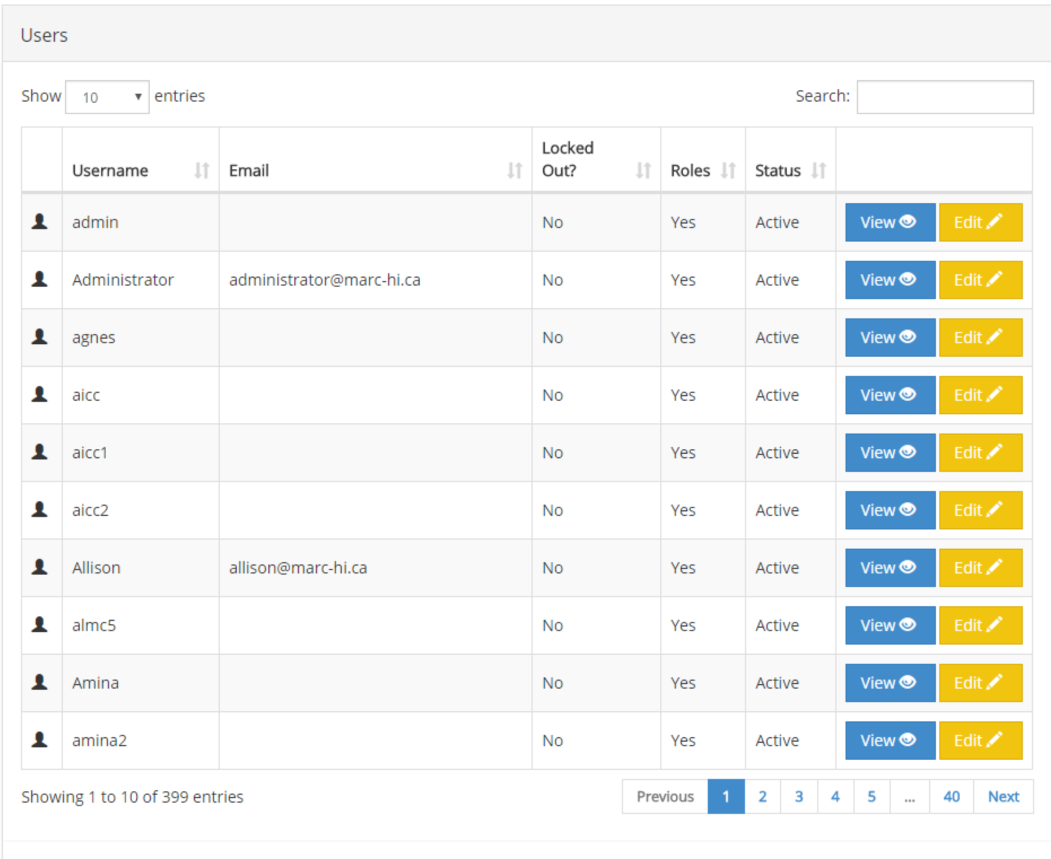
Step 2: Click the **Search** 🔍 button (See the figure below)



Search results will appear in the **User** area below. See the following section on **Users** for more information.

23.2 Users

The **Users** area of the **Users** page displays a list of all the users in the search results. By default the search should load with all users available. (See the figure below)


Users

Show 10 entries Search:

	Username	Email	Locked Out?	Roles	Status	
	admin		No	Yes	Active	View Edit
	Administrator	administrator@marc-hi.ca	No	Yes	Active	View Edit
	agnes		No	Yes	Active	View Edit
	aicc		No	Yes	Active	View Edit
	aicc1		No	Yes	Active	View Edit
	aicc2		No	Yes	Active	View Edit
	Allison	allison@marc-hi.ca	No	Yes	Active	View Edit
	almc5		No	Yes	Active	View Edit
	Amina		No	Yes	Active	View Edit
	amina2		No	Yes	Active	View Edit

Showing 1 to 10 of 399 entries Previous 1 2 3 4 5 ... 40 Next

Figure 23.3 - Users area

Users displayed here show details such as the username, email, locked out status, roles, and active status. Users can be viewed and managed from this page.

New users can also be added from this page. To add a new user, or view and manage an existing user, see sections below.

23.3 New User ⊕

You can create a new user and assign them a role to give them specific accesses depending on what their job may be. To create a new user:

Step 1: From the **Users** page, click the **New** ⊕ button in the top right of the **Search User** area (See the figure below)

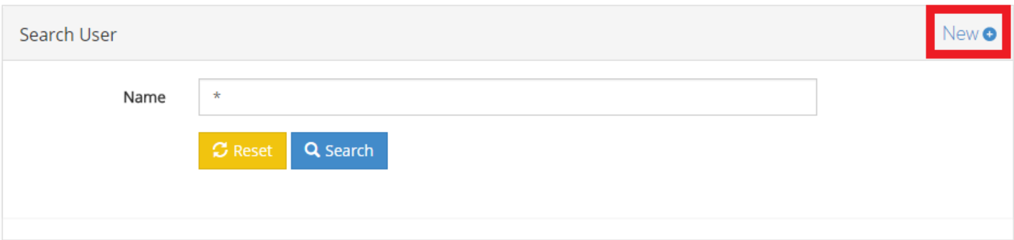


Figure 23.4 - New User button

Step 2: Fill in the fields for the user you are adding (See the figure below):

- Username (Required)
- Password (Required)

  Note: Password must contain one uppercase and one lowercase character and have a minimum of 8 characters.

- Given Name
- Surname
- Language
- Roles (Required)

Note: At least one role is required, multiple roles are allowed

Note: Roles set the access levels for the user account

Note: For more details about adding roles, see the **Edit User: Adding Roles** section below

- Facility

Note: You must enter 4 or more characters to search for a place

- Phone Type
- Phone (Required)
- Email (Required)

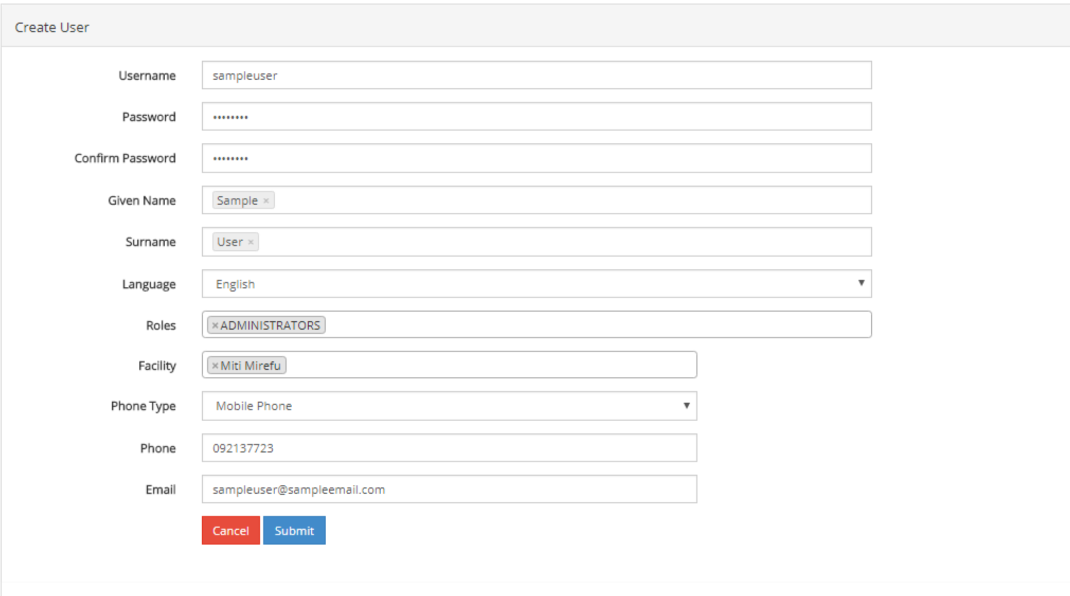
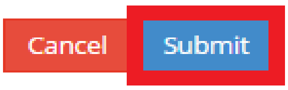


Figure 23.5 - Create User page

Step 3: Press the **Submit** button to create the user (See the figure below)



If created successfully you should see a popup display message saying the User created successfully. From here you will be transferred to the **Edit User** page to make any changes to the user information.

Press submit again to be brought the **View User** page for the user you just created.

23.4 View User

After finding a user in the search results, or creating a new user you can view the user details.

Step 1: From the **Users** page, find a user you wish to view and press the **View** button (See the figure below)

Figure 23.6 - View User button

You will be brought to **View User** page for the user you selected to view.

23.4.1 View User Area

The **View User** area displays key information about a user. You can select **Edit** to edit user details (See the figure below)

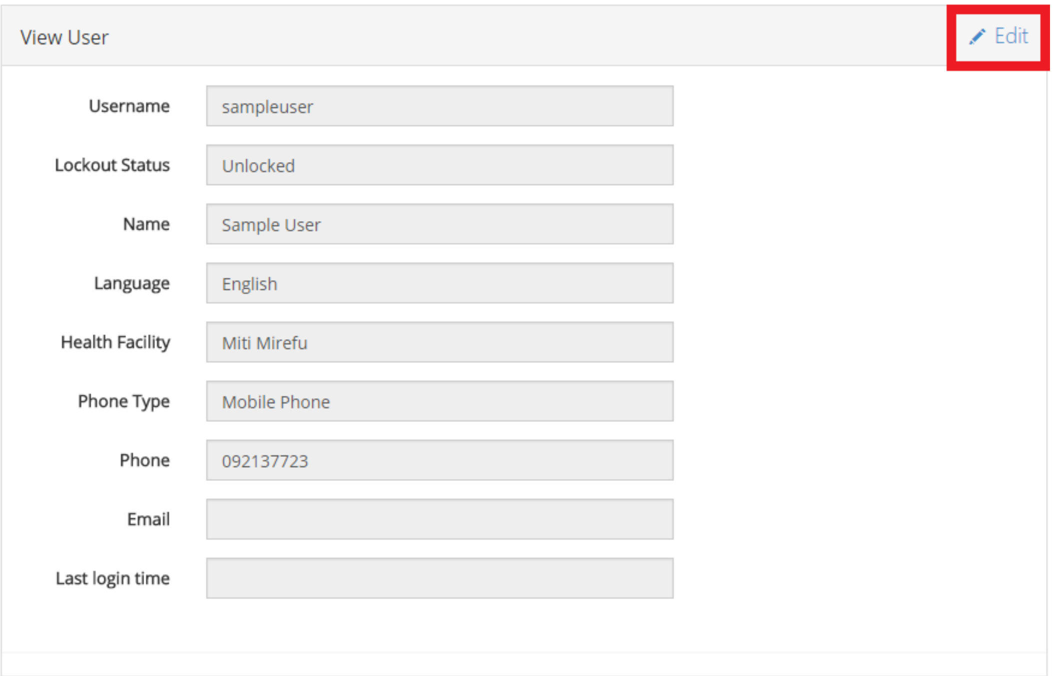


Figure 23.7 - View User area

See the **Edit User** section below for more information about editing a user.

23.4.2 Roles Area

The **Roles** area displays a list of **Roles** related to the user. Name and description for each role are listed. (See the figure below)

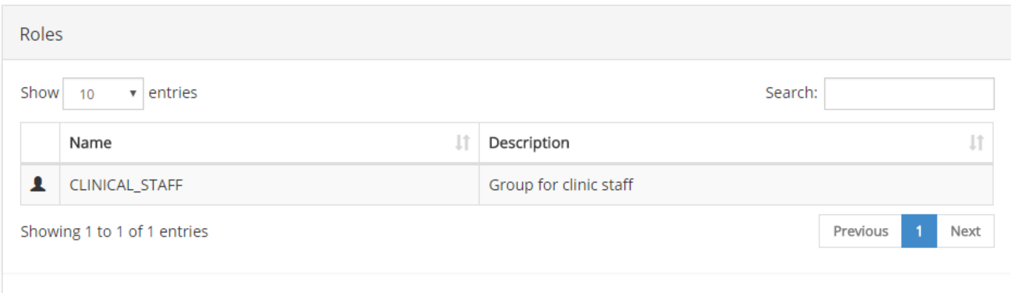


Figure 23.8 - User Roles area

23.5 Edit User

Each user has several components that can be edited. You can change the user details, change facilities and roles.

To access the **Edit User** page from the **User** page:

Step 1: Find a user and click the **Edit** ✎ button (See the figure below)

Figure 23.9 - Edit User button on the Users page

To access the **Edit User** page from the **View User** page:

Step 1: Click the **Edit** ✎ button in the **View User** area (See the figure below)

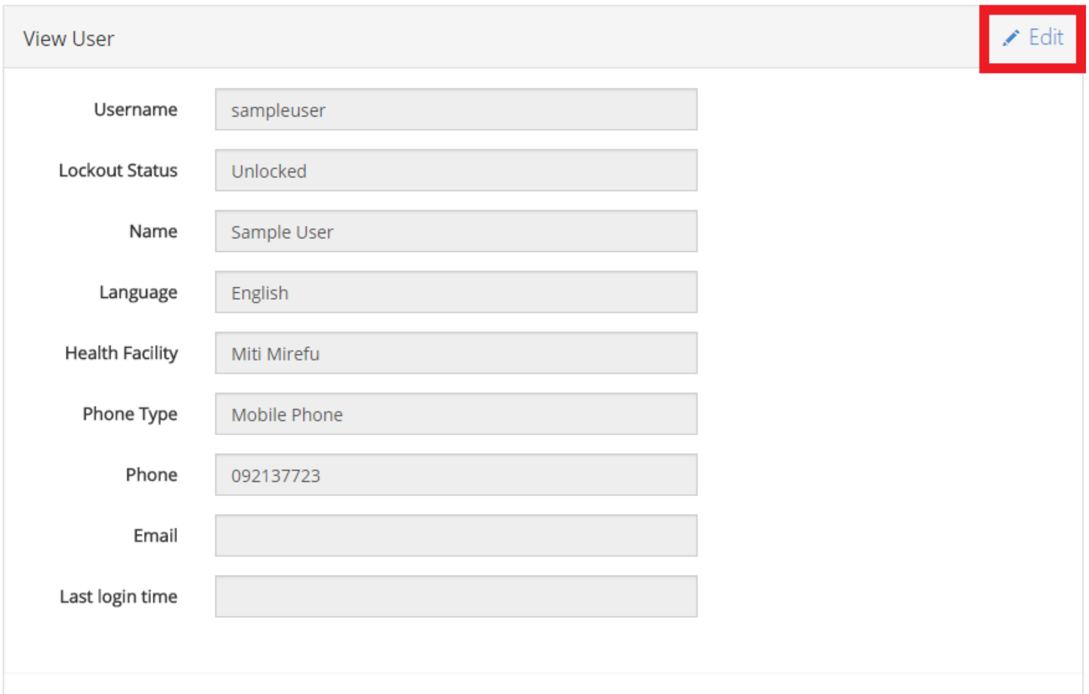


Figure 23.10 - Edit User button on the View User page

You will be brought to **Edit User** page for the user you selected to edit. From this page you can modify fields, change facilities, or add or remove roles.

23.5.1 Edit User Area

In this area you can change all the basic values set for the user you are viewing. *Required fields: Name, Email, Role, Phone Number.*

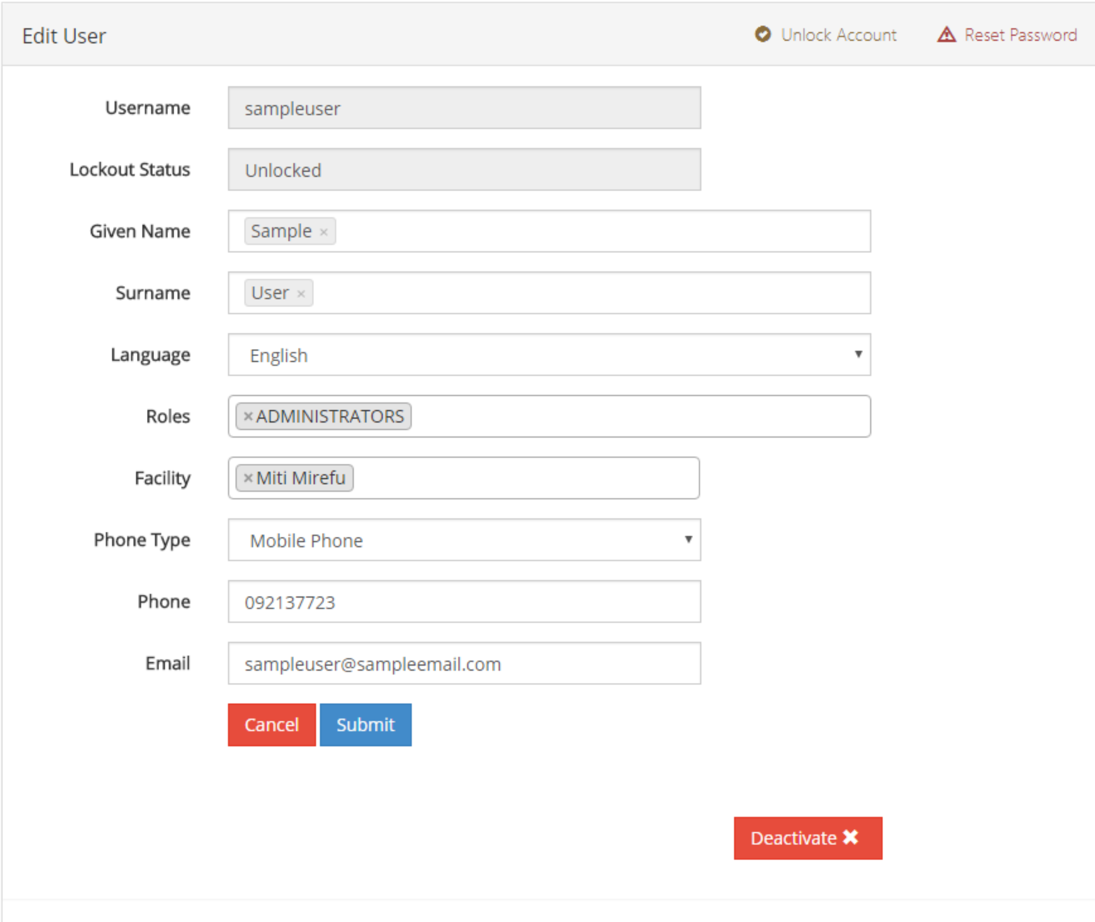


Figure 23.11 - Edit User area

If the user being viewed has been deactivated there will be a red label at the top of the page stating: *Warning, This User Is Not Active*. To activate or deactivate a user, see the sections below.

Deactivating a User ✖

In this area you can deactivate the user. Once deactivated the user cannot be modified or used anywhere in the system until reactivated. To deactivate a user:

Step 1: From the **Edit User** page, click the red **Deactivate** ✖ button in the **Edit User** area (See the figure below)

You will see a message popup stating *User successfully deactivated* and you will be returned to the **Search & View Users** page.

Activating a User

If a user has been deactivated they can be reactivated in the **Edit User** page. Once activated the user can again be modified or used in the system until deactivated. To activate a user:

Step 1: From the **Edit User** page, click the green **Activate** button in the **Edit User** area (See the figure below)

You will see a message popup stating *User successfully activated* and you will be returned to the **Search & View Users** page.

Reset Password ⚠

You can reset the password for a user. To reset the password from **Edit User** page:

Step 1: In the top right corner of the **Edit User** area, click the **Reset Password** ⚠ button (See the figure below)

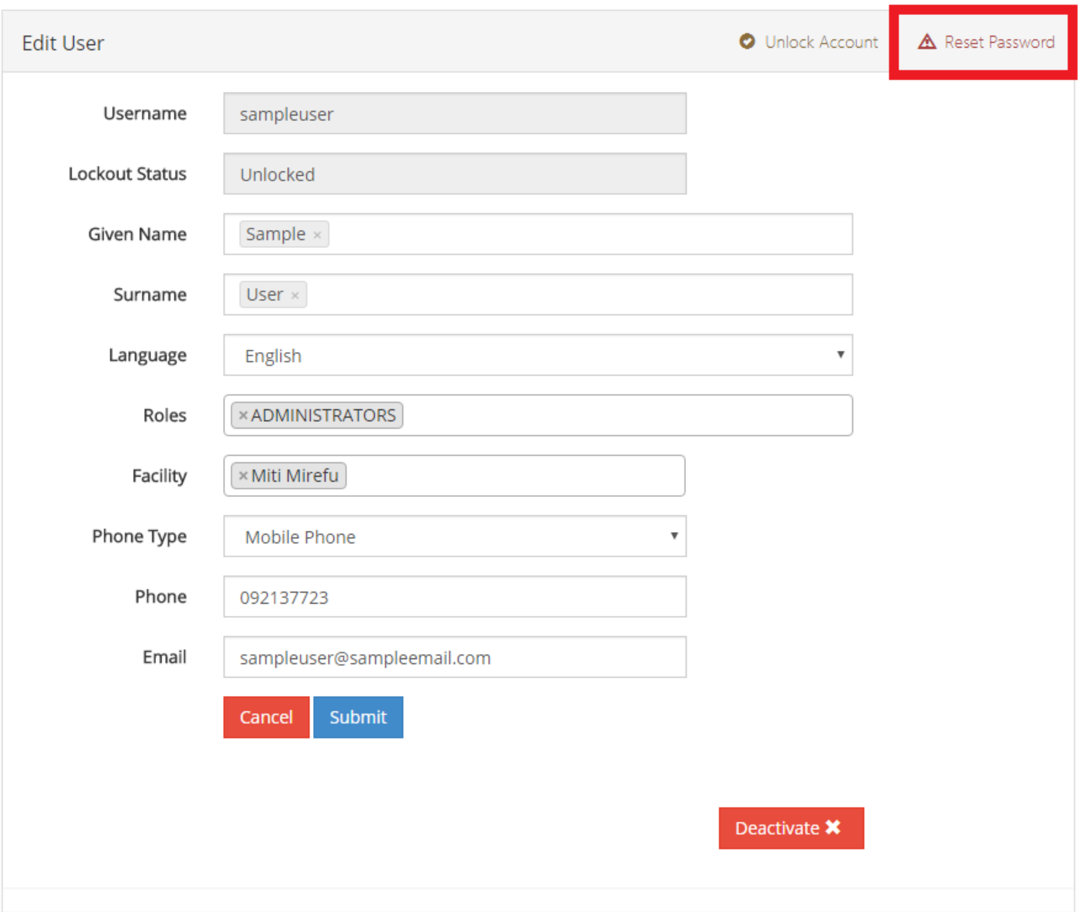


Figure 23.12 - Reset Password button

Step 2: You will be brought to the **Reset Password** page, in the **Reset Password** area (See the figure below):

- Enter the new password in the **Password** field
- Re-enter the new password in the **Confirm Password** field

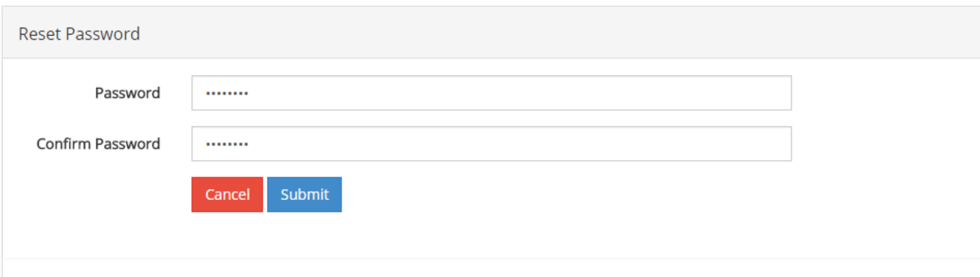
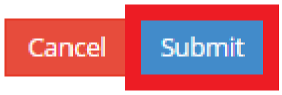


Figure 23.13 - Reset Password page

Step 3: Press the **Submit** button (See the figure below)



The password will be reset for the user.

Unlock Account

If an account has been locked, you can unlock the account from the **Edit User** page.

Step 1: Click the Unlock Account button in the Edit User area (See the figure below)

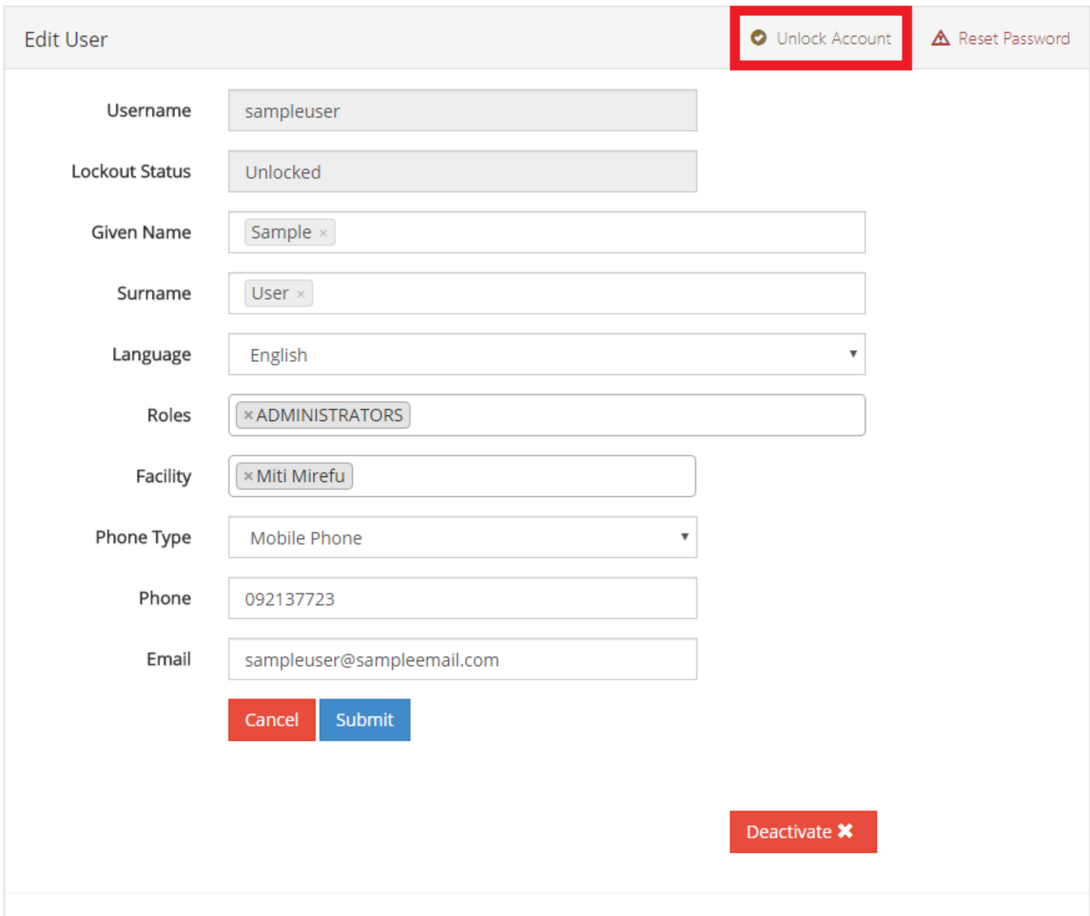


Figure 23.14 – Unlock Account button

You will be returned to the **View User** page and see a popup saying *User account unlocked successfully*.

Adding Roles

You are able to modify available roles in the **Edit User** area of the **Edit User** page. You can add multiple roles to a user to give that user more functionality throughout the system. To add a role to a user:

Step 1: Click on an empty part of the **Roles** field (See the figure below)

Figure 23.15 - Adding Roles for a User

Step 2: A drop-down menu will appear with available roles, select a role (See the figure below)

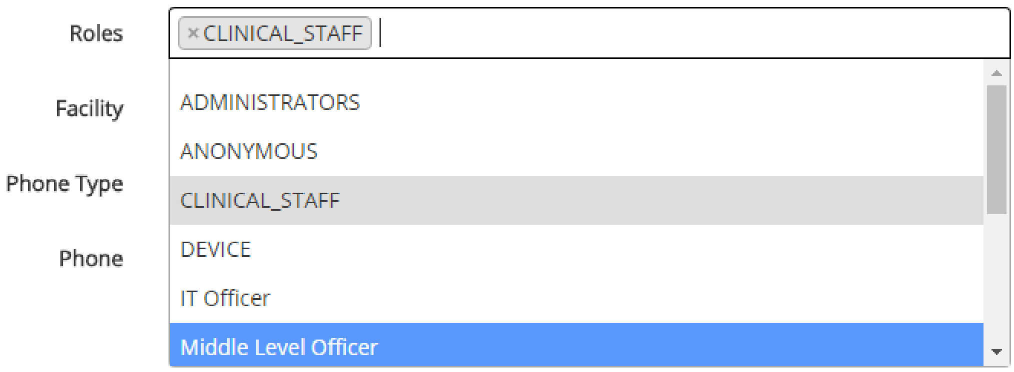
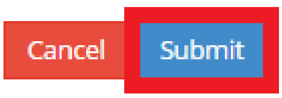


Figure 23.16 - Adding Roles - Drop-down menu

Step 3: Repeat the previous steps to add more roles

Step 4: Once you have modified the roles, press the **Submit** button (See the figure below)



You will be returned to the **View User** page. The **Roles** area will be updated with the changes in policies for that user.

Removing Roles

You are able to modify available roles in the **Edit User** area of the **Edit User** page. You can restrict access for specific users by removing some roles that exist for that user. To remove a role from a user:

Step 1: Click on the ✖ next to the name of a role in the **Roles** field that you want to remove (See the figure below)

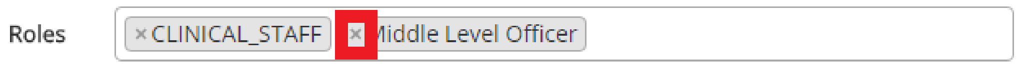
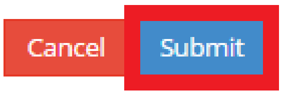


Figure 23.17 - Removing Roles from a User

Step 2: Repeat the previous step to remove another role

> **Note:** At least one role is required

Step 3: Once you have modified the role, press the **Submit** button (See the figure below)



You will be returned to the **View User** page. The **Roles** area will be updated with the changes in role for that user.

23.5.2 Roles Area

The **Roles** area displays a list of **Roles** related to the user. Name and description for each role are listed (See the figure below). If the roles list is very large there is a search bar that allows you to filter results.

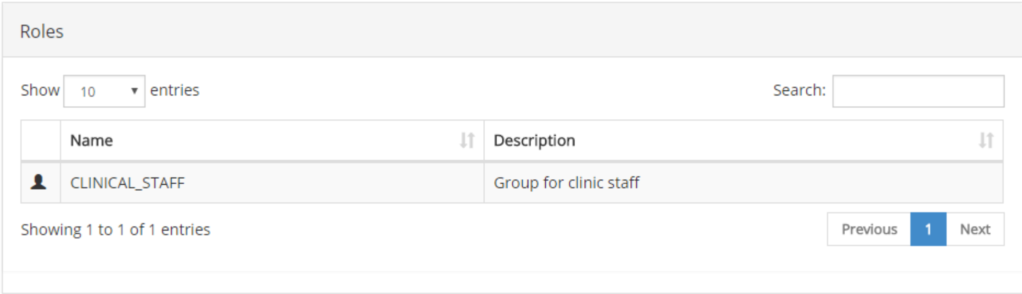


Figure 23.18 - Roles area

Chapter 24: About

The **About** page is the hub of all versioning information for the system (See the figure below). The top of the page shows the Open Immunize version details and version number. Also in this section you can click to submit a bug report. For information on submitting bug reports see the section below.

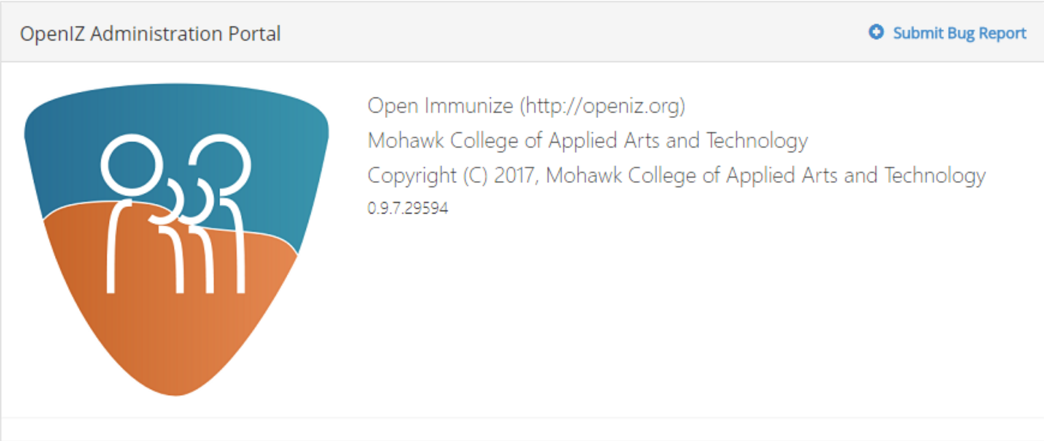
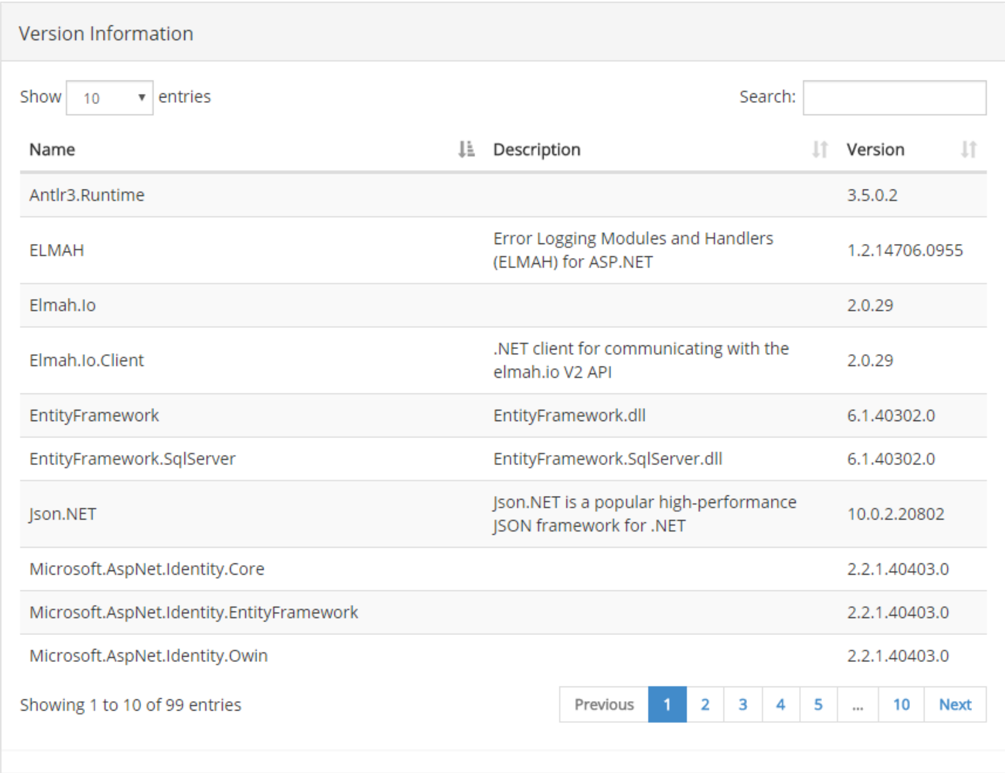


Figure 24.1 - About page

24.1 Version Information

The **Version Information** area of the **About** page displays a list of all the elements used in the system as well as descriptions and version numbers. (See the figure below)



Version Information

Show 10 entries Search:

Name	Description	Version
Antlr3.Runtime		3.5.0.2
ELMAH	Error Logging Modules and Handlers (ELMAH) for ASP.NET	1.2.14706.0955
Elmah.Io		2.0.29
Elmah.Io.Client	.NET client for communicating with the elmah.io V2 API	2.0.29
EntityFramework	EntityFramework.dll	6.1.40302.0
EntityFramework.SqlServer	EntityFramework.SqlServer.dll	6.1.40302.0
Json.NET	Json.NET is a popular high-performance JSON framework for .NET	10.0.2.20802
Microsoft.AspNet.Identity.Core		2.2.1.40403.0
Microsoft.AspNet.Identity.EntityFramework		2.2.1.40403.0
Microsoft.AspNet.Identity.Owin		2.2.1.40403.0

Showing 1 to 10 of 99 entries

Previous 1 2 3 4 5 … 10 Next

Figure 24.2 - Version Information area

The search feature in this section allows you to quickly filter through all entries available. To filter the list start typing something in the search field.

24.2 Submitting a Bug Report

On the about page there is a section that allows you to submit bug reports. Bug reports will be submitted and reviewed to help make the system better and issue free. You can **Submit Bug Reports**. To submit a bug report:

Step 1: From the **About** page, in the **OpenIZ Administration Portal** area, press the **Submit Bug Report** button (See the figure below)

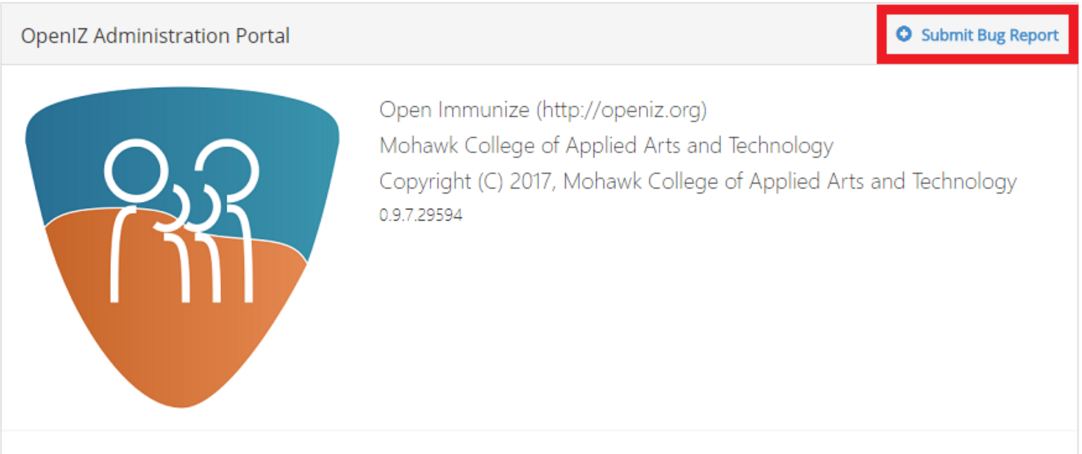


Figure 24.3 - Submit Bug Report button

You will be brought to the **Submit Bug Report** page. From here you can enter any details related to the bug you have encountered.

Step 2: Fill out the **Steps to Reproduce** field (See the figure below)

> **Note:** This should contain clear and specific details on how the bug occurred. Try to point out what you were doing at the time, what you changed, who you were logged in as or any other details.

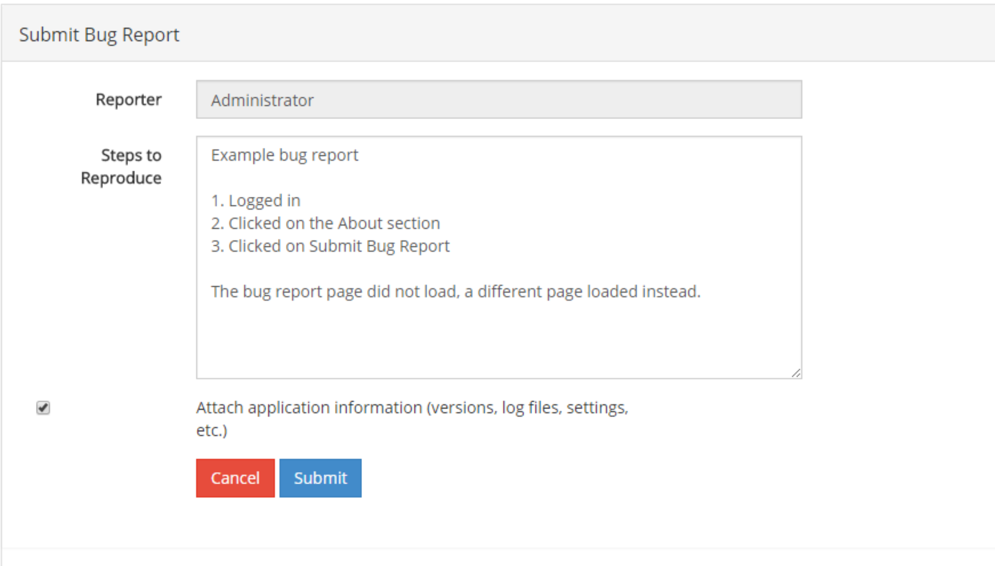
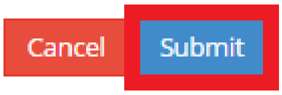


Figure 24.4 - Submit Bug Report page - Sample bug report

Step 4: Check or uncheck to attach application information

Note: The more information that is available the easier it will be to isolate the issue.

Step 3: Click the **Submit** button (See the figure below)



You will be returned to the **About** page and your bug will be submitted.