

USER GUIDE FOR PREVENT TB SMART SETUP

Version 2.0

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ABOUT THIS GUIDE

The document is a complete guide for the users on how to use the Smart Setup. It contains step by step instructions on each of the components with illustrations for ease of understanding flows & features.

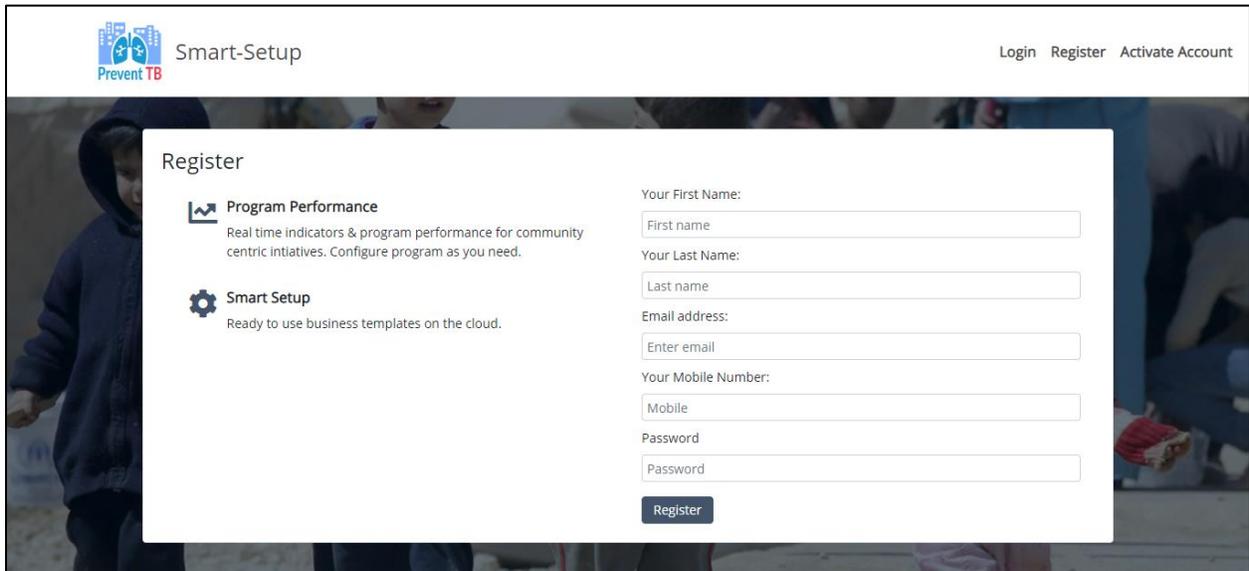
Smart Setup URL: <https://tbigen.duredemos.com/smartsetup>

SMART SETUP WEB INTERFACE

This section gives details for instructions on how to use the Smart Setup.

ACCOUNT CREATION

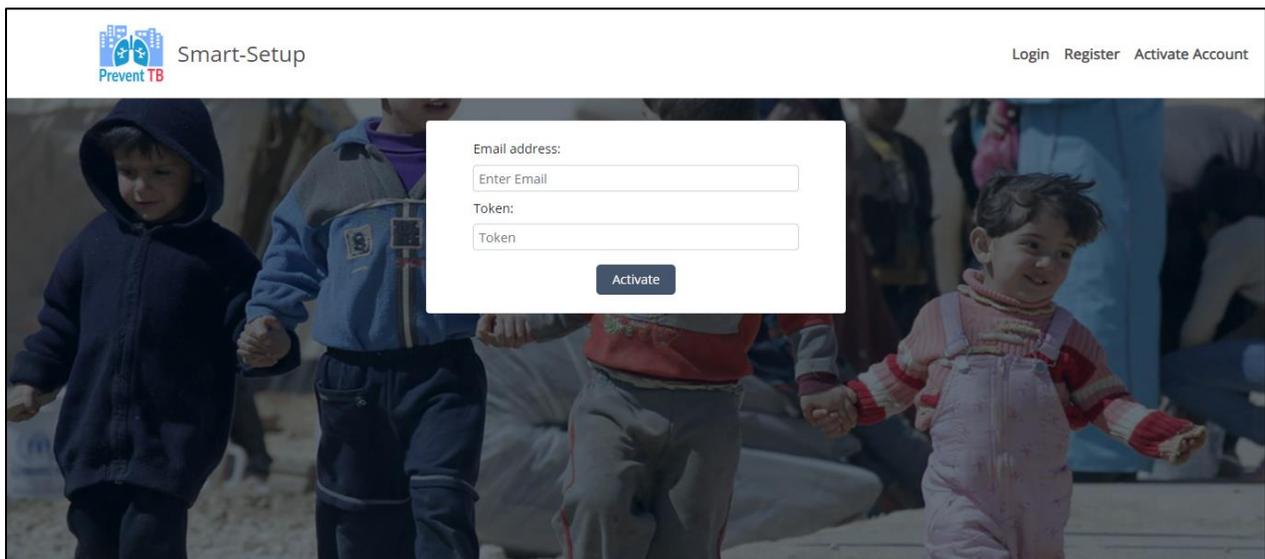
Step 1: Register or Sign Up



The screenshot shows the 'Smart-Setup' web interface. At the top left is the 'Prevent TB' logo and 'Smart-Setup' text. At the top right are links for 'Login', 'Register', and 'Activate Account'. The main content area features a 'Register' modal form. On the left side of the form, there are two menu items: 'Program Performance' with a line graph icon and the description 'Real time indicators & program performance for community centric initiatives. Configure program as you need.', and 'Smart Setup' with a gear icon and the description 'Ready to use business templates on the cloud.'. On the right side, there are input fields for 'Your First Name:' (with a sub-field 'First name'), 'Your Last Name:' (with a sub-field 'Last name'), 'Email address:' (with a sub-field 'Enter email'), 'Your Mobile Number:' (with a sub-field 'Mobile'), and 'Password' (with a sub-field 'Password'). A 'Register' button is located at the bottom right of the form.

Once the Registration process is complete the user will receive a confirmation token in the registered Email Address. The user will now be directed to the Account Activation screen.

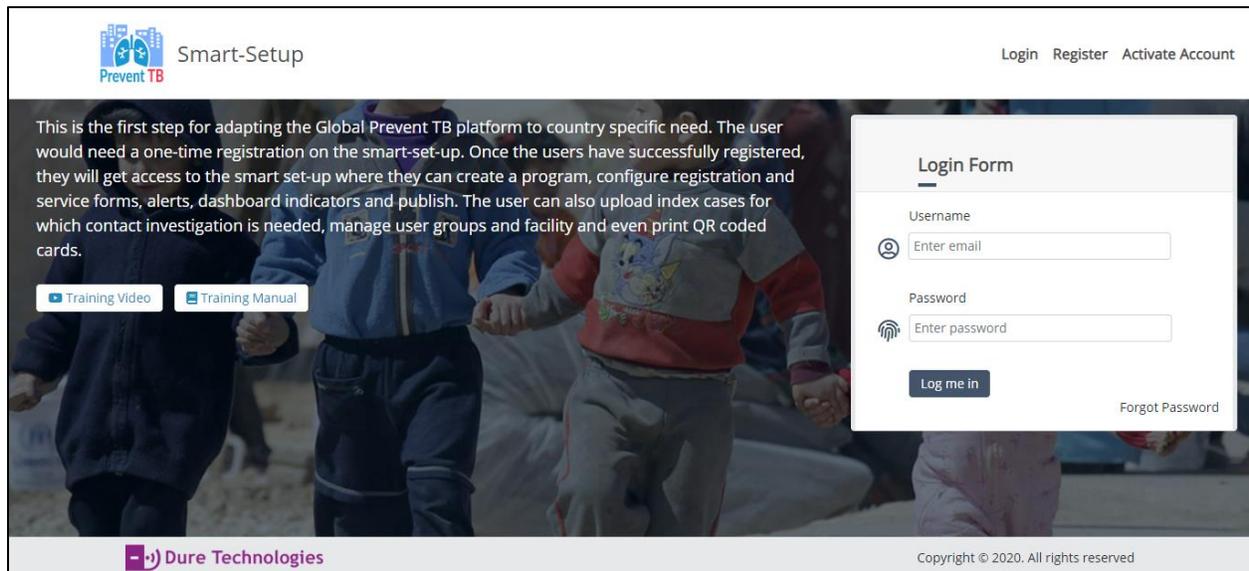
Step 2: Activate Account



The screenshot shows the 'Smart-Setup' web interface. At the top left is the 'Prevent TB' logo and 'Smart-Setup' text. At the top right are links for 'Login', 'Register', and 'Activate Account'. The main content area features an 'Activate' modal form. It contains two input fields: 'Email address:' with a sub-field 'Enter Email', and 'Token:' with a sub-field 'Token'. An 'Activate' button is located at the bottom center of the form.

Once the Account is activated and verified the user will be directed to the Login Screen.

Step 3: Login or Sign In



The screenshot displays the 'Smart-Setup' interface for the 'Prevent TB' platform. The header includes the 'Prevent TB' logo and the text 'Smart-Setup', with navigation links for 'Login', 'Register', and 'Activate Account'. The main content area features a background image of children and a text block explaining the smart-setup process. Below the text are two buttons: 'Training Video' and 'Training Manual'. On the right side, a 'Login Form' is overlaid, containing fields for 'Username' (with a placeholder 'Enter email') and 'Password' (with a placeholder 'Enter password'), a 'Log me in' button, and a 'Forgot Password' link. The footer contains the 'Dure Technologies' logo and the copyright notice 'Copyright © 2020. All rights reserved'.

After successful login the user will be directed to the Program page where a Program can be created for a country.

Program Definition: a system for data management that can be adapted to the country needs. This system will next be used on the mobile application to collect and save the data. The third component of the system will be the dashboard function which will derive summary indicators based on the data to display trends.

PROGRAM PAGE

Prevent TB

Case Test
testcase100@mailinator.com(APPADMIN)

SMART SETUP

Program Registration Forms Alerts Workflow

Test LTBI Generic Next

Program Details

*Program Name
Prevent TB

Program Description

Select Primary Language
English

*App Name
Prevent TB

Standard Disclaimer, if any
By downloading the WHO Global Prevent TB mobile app (the "Application"), you - as user of the Application - agree to accept the terms of use, copyright notice and the disclaimers here below: In any use of this work, there should be no suggestion that WHO endorses any specific organization, products or services. The use of the WHO logo is not permitted. If you adapt the work, then you must license your work

* Select Country

Powered by Dure Technologies

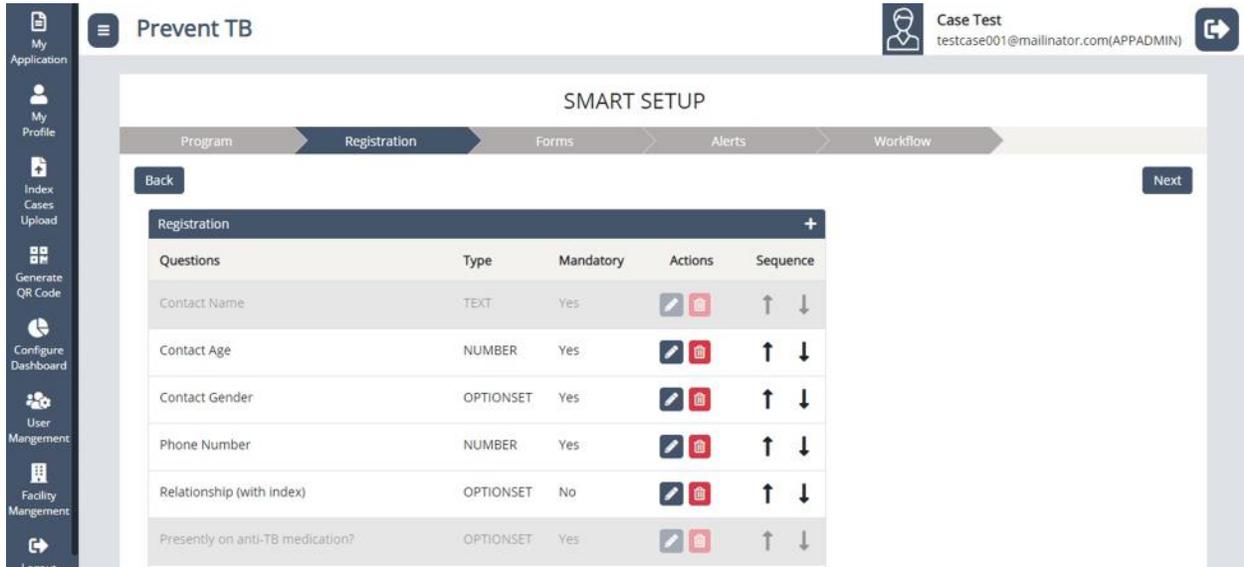
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By Default, it will display the Program Name, App Name as 'Prevent TB' and the Standard Disclaimer field will also have a prefilled default disclaimer. The User can add and edit the details as required and must select a country in order to proceed to the next step.

Here, the user has an option to quickly publish the program with the 'Test LTBI Generic' button.

To go to the next step i.e. 'Registration' click on the 'Next' button.

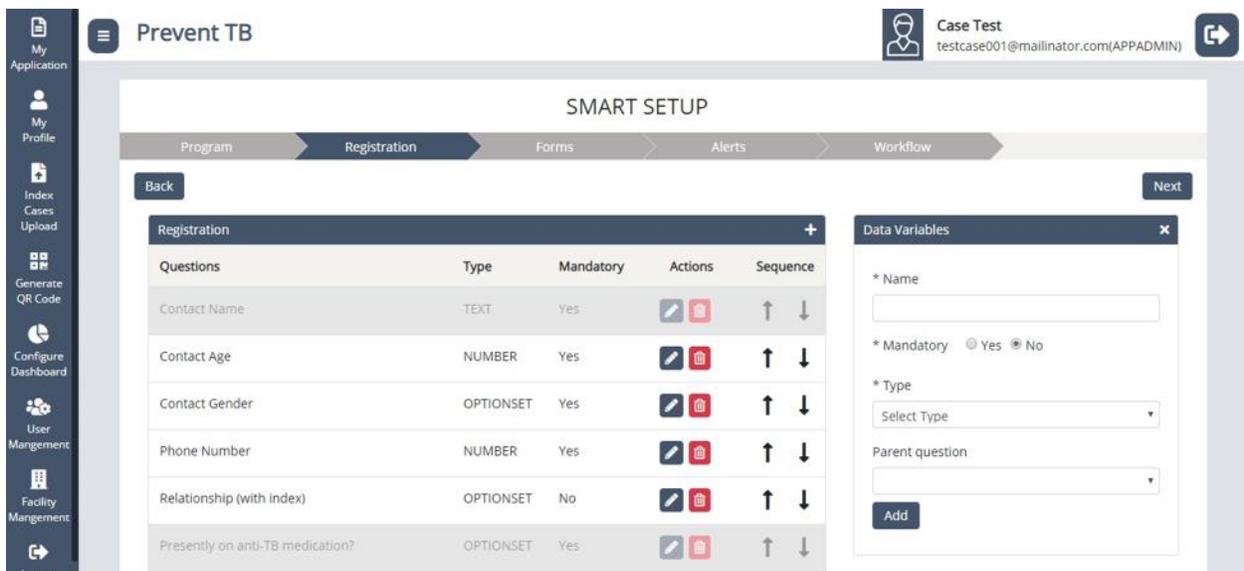
REGISTRATION PAGE



In this step, the user will see all the 'Data Variables' which are predefined in the smart setup. The user can add new data variables, update and delete existing variables as required. Also, sorting the sequence of the variables can be done using the up & down arrows.

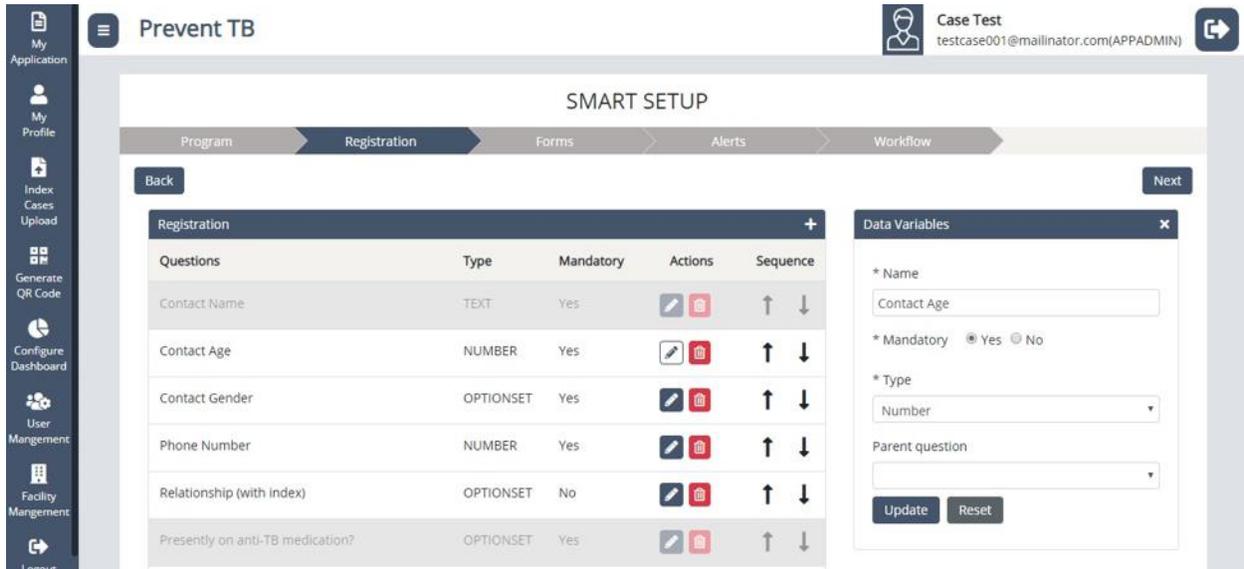
Add New Data Variable

On clicking the '+' icon the user can add a new data variable



Update Existing Data Variable

On clicking the Edit (pencil icon) the user can update the details of the existing data variables



To go to the next step i.e. 'Forms' click on the 'Next' button.

FORMS PAGE

Prevent TB Case Test
testcase001@mailinator.com(APPADMIN)

SMART SETUP

Program > Registration > **Forms** > Alerts > Workflow

Back Next

Refer to Investigation				
Questions	Type	Mandatory	Actions	Sequence
Symptoms	CHECKBOX	Yes		↑ ↓
Refer to Lab for Investigation	OPTIONSET	Yes		↑ ↓
Refer to Facility Center	FACILITY	Yes		↑ ↓

Active TB Testing				
Questions	Type	Mandatory	Actions	Sequence
Date of Testing	DATE	Yes		↑ ↓
Method of Testing	CHECKBOX	Yes		↑ ↓

In this step, the user can add new data variable under each form, update and delete existing variables as required. Also, sorting the sequence of the variables can be done using the up & down arrows.

To go to the next step i.e. 'Alerts' click on the 'Next' button.

ALERTS PAGE

The screenshot shows the 'Prevent TB' SMART SETUP interface. The main content area is titled 'SMART SETUP' and has a navigation bar with 'Program', 'Registration', 'Forms', 'Alerts', and 'Workflow'. The 'Alerts' section is active, showing a 'Back' button on the left and a 'Next' button on the right. Below the navigation bar, there are three columns: 'Alert Name', 'Threshold in days', and 'Select data variables'. The 'Alert Name' column contains six text input fields with the following values: 'LTBI Testing Referral Alert', 'TB Testing Referral Alert', 'LTBI Treatment Referral Alert', 'TB Treatment Referral Alert', 'LTBI Re-testing Alert', and 'TB Re-testing Alert'. The 'Threshold in days' column contains six numeric input fields, each with a value of '0' and minus/plus buttons. The 'Select data variables' column contains a dropdown menu with the following options: 'Client Type', 'Contact Name', 'Contact Age', 'Contact Gender', 'Phone Number', 'Relationship (with index)', and 'Presently on anti-TB medication?'. The 'Client Type' option is selected, and the dropdown menu is open, showing the selected options. The 'Client Type' option is also selected in the dropdown menu. The 'Client Type' option is also selected in the dropdown menu. The 'Client Type' option is also selected in the dropdown menu.

In this step, the user can change the Alert Name, Threshold as required. And user can select the data variables which will be visible in the mobile application under Alerts module.

WORKFLOW PAGE

Prevent TB Case Test
testcase001@mailinator.com(APPADMIN)

SMART SETUP

Program > Registration > Forms > Alerts > Workflow

Back Publish

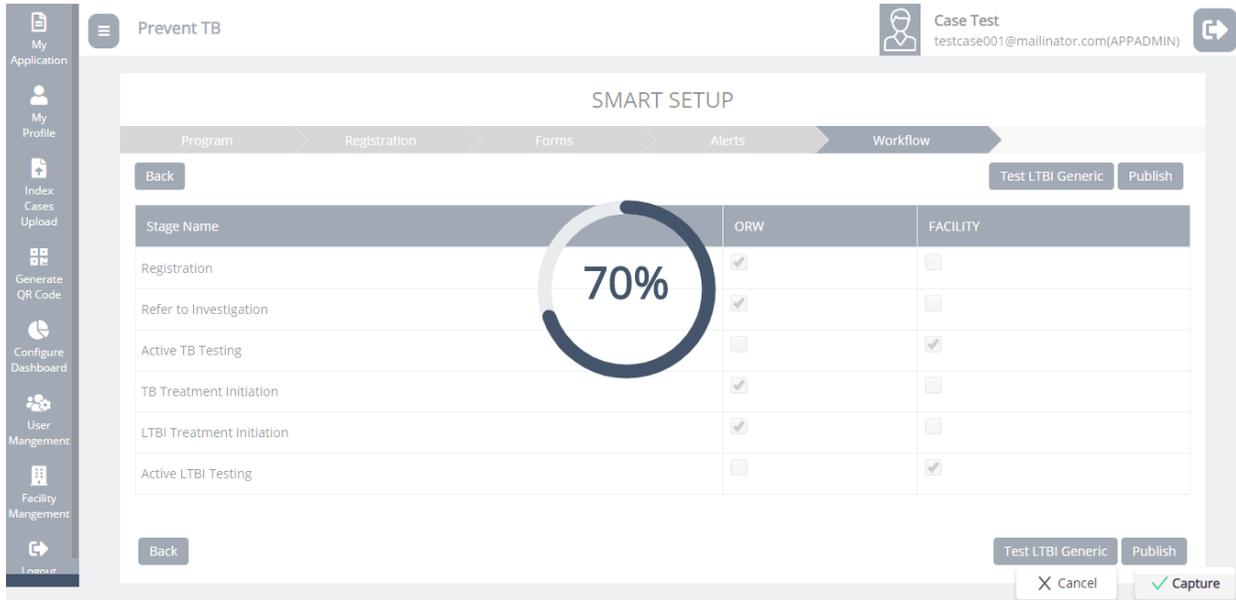
Stage Name	ORW	FACILITY
Registration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Refer to Investigation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Active TB Testing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Active LTBI Testing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TB Treatment Initiation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LTBI Treatment Initiation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Back Publish

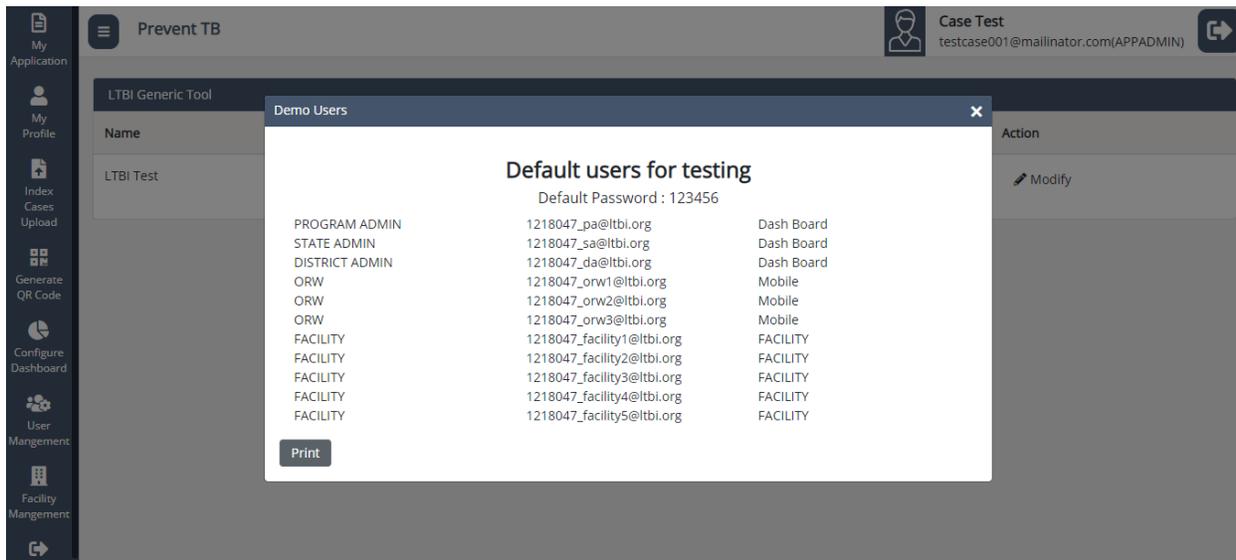
Here, the forms/ stages are by default assigned to their respective user roles i.e. Outreach Worker (ORW) & Facility.

PUBLISH SMART SETUP

On the Workflow page the user must click on the 'Publish' button to save the changes and additions done in the previous steps.

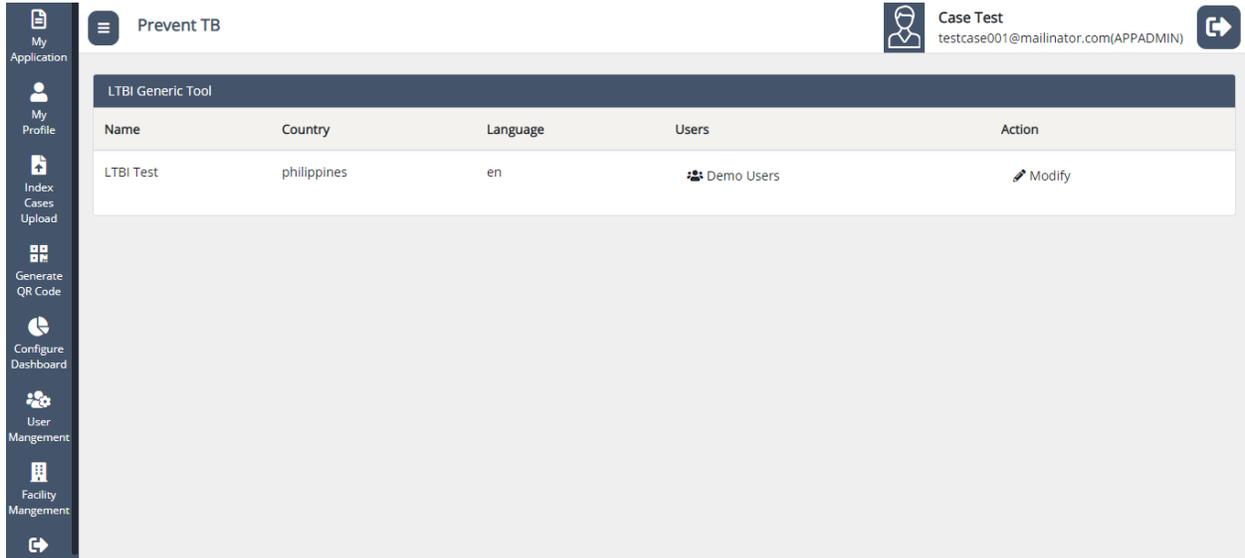


After the Publish percentage has reached 100 then user will see a screen where all the Demo User Credentials for Mobile Application & Dashboard will be displayed.



OTHER MENU ITEMS

MY APPLICATION PAGE

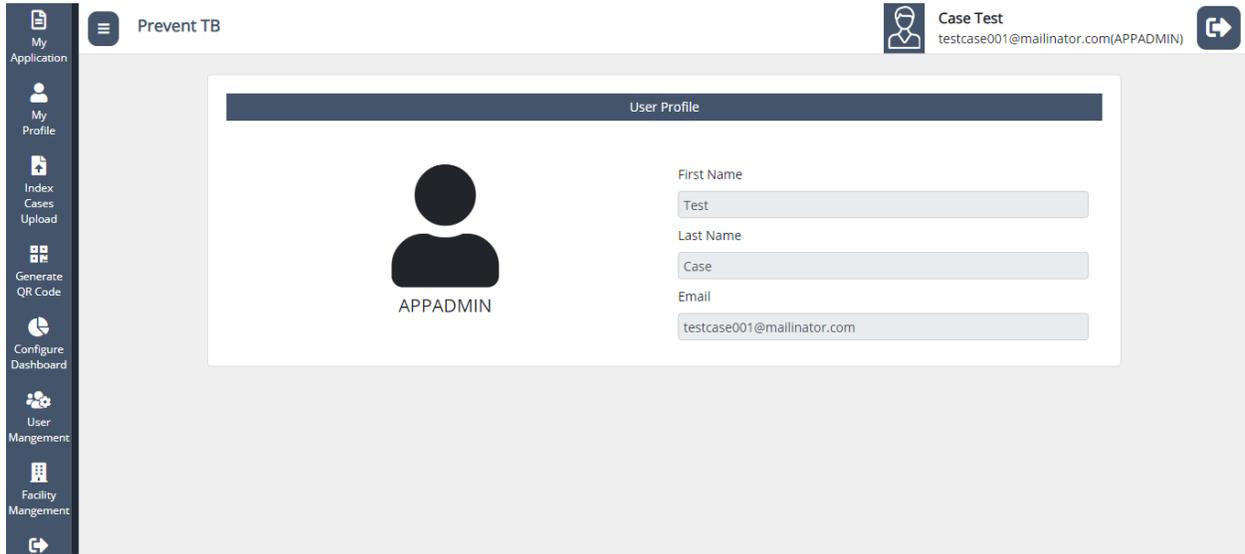


The screenshot displays the 'Prevent TB' application interface. On the left is a vertical sidebar with icons for 'My Application', 'My Profile', 'Index Cases Upload', 'Generate QR Code', 'Configure Dashboard', 'User Management', and 'Facility Management'. The main header shows 'Prevent TB' and a user profile for 'Case Test' (testcase001@mailinator.com) with a refresh icon. The central content area features a table titled 'LTBI Generic Tool' with the following data:

Name	Country	Language	Users	Action
LTBI Test	philippines	en	Demo Users	Modify

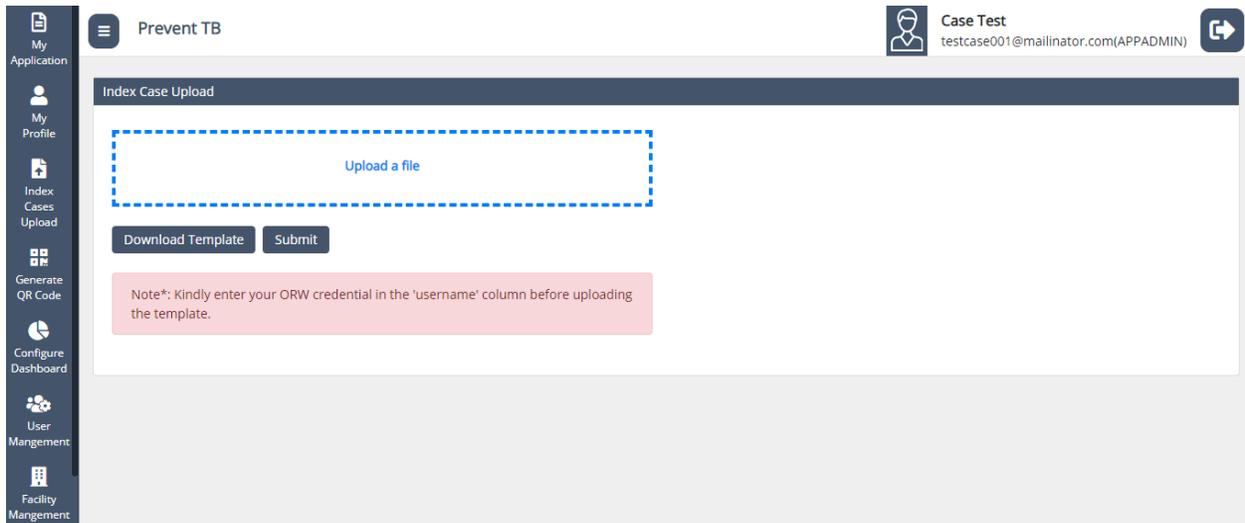
Here, After Publish the user has an option to view the Demo Credentials again via the 'Demo Users' link & the 'Modify' button can be used if there are more changes or additions required in the Smart Setup steps i.e. Program Details, Registration, Forms, Alerts and the user has to publish the program again to save the changes. After Publish the new changes & updates will be reflected in the PREVENT TB Mobile Application & Dashboard.

MY PROFILE PAGE



The My Profile page will have the personal details of the user (App Admin).

INDEX CASES UPLOAD PAGE



With this upload feature, the user can add index cases & assign it to a specific Outreach Worker (ORW) with the help of the template. The new index cases uploaded will be visible under 'My Clients' module in PREVENT TB mobile application.

GENERATE QR CODE PAGE

The screenshot shows the 'Generate QR Code' page in the Prevent TB application. The page features a sidebar with navigation options: My Application, My Profile, Index Cases Upload, Generate QR Code, Configure Dashboard, User Management, and Facility Management. The main content area has a header 'Prevent TB' and a user profile 'Case Test' with email 'testcase001@mailinator.com(APPADMIN)'. Below the header is a 'Generate QR Code' section with a text input field containing '10', a 'Generate QR Code' button, and a 'Print' button. The main area displays three QR code templates, each with a 'Prevent TB' logo and fields for Name, UIC, Issue Date, and Issue By.

The user can download multiple QR Codes with this feature. The QR codes can be used for associating a contact case during registration via the Prevent TB mobile application.

CONFIGURE DASHBOARD MODULE

This Module has three components

- Charts and Graphs

Here, user can see all the default charts which are created after Publish and these charts can be seen in the Dashboard (Analysis Section). In this Module, the user can update the Chart Details i.e. Chart type, name, X-axis label, Y-axis label and Disable or Enable the status of the chart.

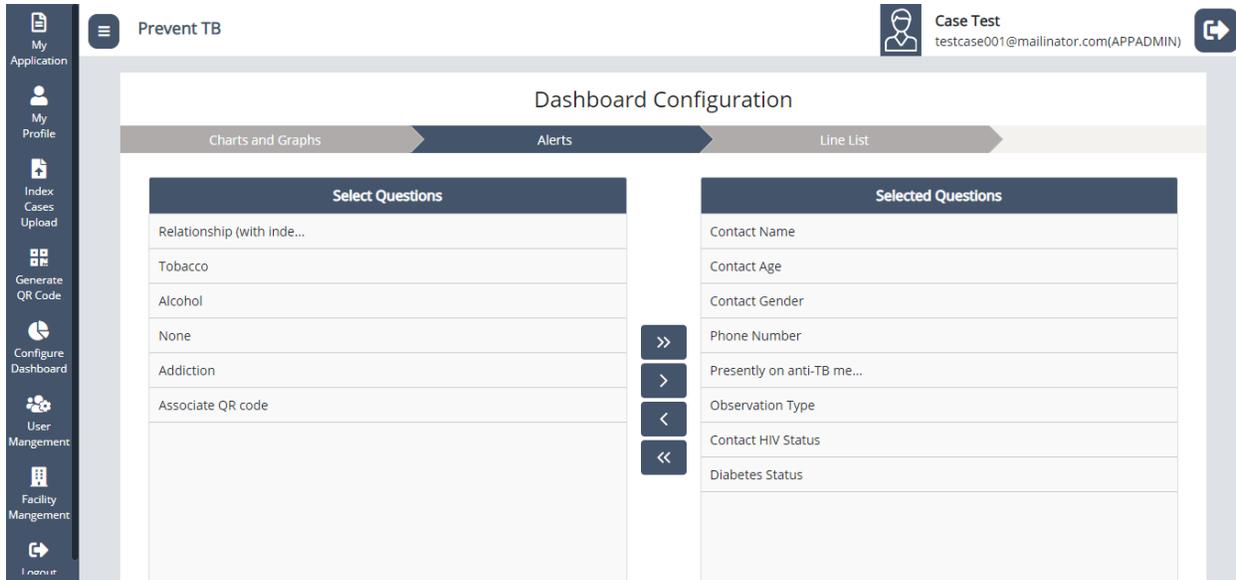
The screenshot displays the 'Prevent TB' dashboard configuration interface. The main content area is titled 'Dashboard Configuration' and has three tabs: 'Charts and Graphs', 'Alerts', and 'Line List'. The 'Charts and Graphs' tab is active, displaying a table of chart configurations. A 'Chart Details' window is open, showing a bar chart for 'Contact Gender' with categories 'Male', 'Female', and 'Third Gender' and a count on the x-axis.

Chart Name	Type	Status	Actions
Client Type	bar	Active	
Contact Gender	bar	Active	
Relationship (with index)	bar	Active	
Presently on anti-TB medication?	bar	Active	
Observation Type	bar	Active	
Contact HIV Status	bar	Active	
Diabetes Status	bar	Active	

The 'Chart Details' window shows a bar chart for 'Contact Gender'. The y-axis is labeled 'Type' and has categories 'Male', 'Female', and 'Third Gender'. The x-axis is labeled 'count' and ranges from 0 to 4. The bars show counts of 1 for Male, 2 for Female, and 3 for Third Gender.

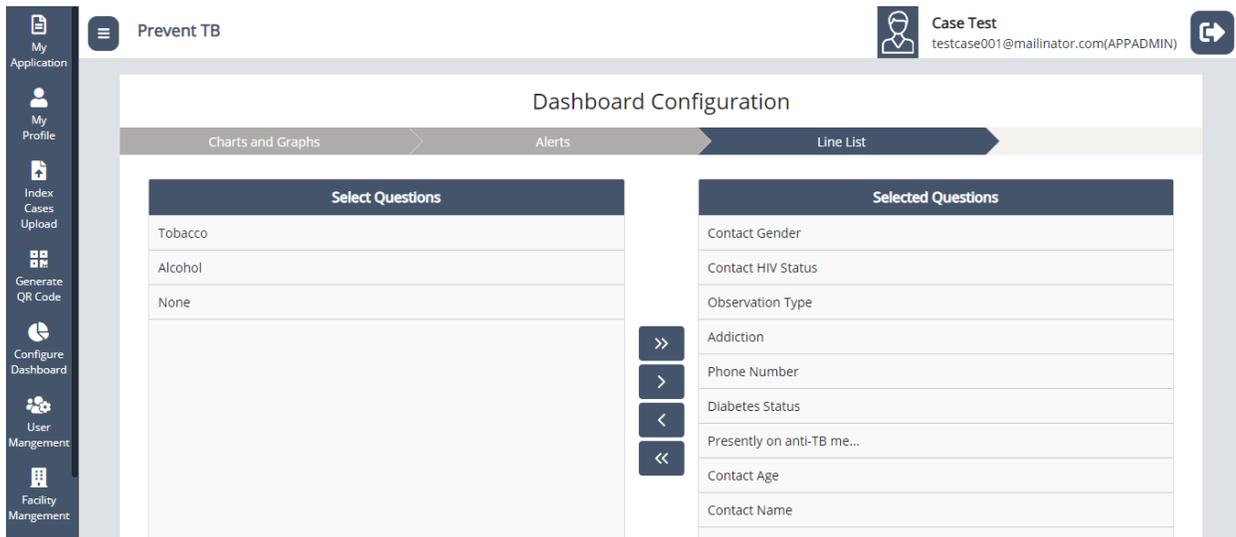
➤ Alerts

Here, the user can select or unselect questions which will be displayed under the Alerts section in the Dashboard.



➤ Line List

Here, the user can select or unselect questions which will be displayed under the Line List section in the Dashboard.



USER MANAGEMENT MODULE

In this module, all the default demo users received after Publish will be seen and the details of these users can be updated (For e.g. First Name, Last Name, Contact Number & Password can be updated). New Outreach Worker (ORW) & Facility users can be created via the 'Add User' button.

The screenshot displays the 'User Management' interface for the 'Prevent TB' application. The top navigation bar includes 'My Application', 'My Profile', 'Index Cases Upload', 'Generate QR Code', 'Configure Dashboard', 'User Management', and 'Facility Management'. The user is logged in as 'Case Test' with email 'testcase001@mailinator.com(APPADMIN)'. The main content area shows a table of users and an 'Add New User' form.

Firstname	Lastname	Email	Role	Status	Action
Default User	PROGRAM ADMIN	1218047_pa@ltbi.org	PROGRAM ADMIN	<input checked="" type="checkbox"/>	
Default User	STATE ADMIN	1218047_sa@ltbi.org	STATE ADMIN	<input checked="" type="checkbox"/>	
Default User	DISTRICT ADMIN	1218047_da@ltbi.org	DISTRICT ADMIN	<input checked="" type="checkbox"/>	
Default User	ORW	1218047_orw1@ltbi.org	ORW	<input checked="" type="checkbox"/>	
Default User	ORW	1218047_orw2@ltbi.org	ORW	<input checked="" type="checkbox"/>	
Default User	ORW	1218047_orw3@ltbi.org	ORW	<input checked="" type="checkbox"/>	
FACILITY	USER	1218047_facility1@ltbi.org	FACILITY	<input checked="" type="checkbox"/>	
FACILITY	USER	1218047_facility2@ltbi.org	FACILITY	<input checked="" type="checkbox"/>	

The 'Add New User' form includes the following fields:

- * First Name
- * Last Name
- * Email
- Contact Number
- * Password
- * Confirm Password

FACILITY MANAGEMENT MODULE

In this module, all the Default Facilities created after Publish will be seen and the details of these facilities can be updated as required. The Default Facilities are displayed in the PREVENT TB mobile application for the Outreach Worker (ORW) under 'Refer to Investigation' form.

There are 2 buttons in this page & the details of each are mentioned below:

- Create New Organization

	Email	Users	Action
	testfacility1@tbi.org	1218047_facility1@tbi.org	
	testfacility2@tbi.org	1218047_facility2@tbi.org	

The Country which was selected on the program page after Publish we can see their respective State, Districts under 'Organization Parent' field. With the 'Create New Organization' button we can define any new State, District, and City in the existing organization structure as required. And the newly defined organization name can be selected while creating a new facility.

➤ Create New Facility

The screenshot displays the 'Prevent TB' web application interface. At the top, there is a navigation bar with the application name 'Prevent TB' and a user profile section for 'Case Test' with the email 'testcase001@mailinator.com (APPADMIN)'. A sidebar on the left contains various navigation options: My Application, My Profile, Index Cases Upload, Generate QR Code, Configure Dashboard, User Management, Facility Management, and Logout. The main content area is titled 'Facility Management' and features two buttons: 'Create New Organization' and 'Create New Facility'. The 'Create New Facility' button is active, opening a modal form titled 'Facility'. The form contains the following fields: Facility Code, * Facility Name, * Address 1, Address 2, * Pincode, * Email, Contact, * State, District, and City. To the right of the form is a map titled 'Pin facility location' showing a red pin in Mumbai, India, with labels for Virar, Thane, Kalyan, and Rasaya.

A new facility can be added with the 'Create New Facility' button & the newly created facility name will be visible under the User Management Module ('Add New User' form) when a new Facility User is created.