Prevent TB

Smart Setup

User Manual

VERSION 1.0
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Introduction to Prevent TB Smart Setup

Purpose of the document

This document is a complete guide for the users on how to use the Prevent TB Smart Setup. It contains a detailed overview of all the modules and features along with screenshots which can guide administrators/program managers to easily customize the complementing Prevent TB components as per program needs.

Prevent TB Components

The Prevent TB platform has the following modules:

1. Web / Mobile Application – Healthcare provider interface
2. Web / Mobile Application – Client Interface
3. Dashboard
4. Smart Setup

This document covers the walk-through of the Smart Setup.

System URLs

1. Smart Setup URL –

Modules

The following modules are present on the Prevent TB Smart Setup:

1. My application
2. My Profile
3. Index Case Upload
4. Label Translations
5. Generate QR Code
6. User Management
7. Facility Management
Caters to

The Prevent TB Smart Setup caters to country program managers and enables them to configure the complementing application and dashboard themselves based on their local program needs. It acts as a user-friendly platform that can be used for addition and editing of data variables, user/facility management, customization of alerts, etc.

Introduction to the Smart Setup

Registration and Login

1. The Prevent TB Smart Setup is available as a web platform and can be accessed using any web browser.

2. To access the Smart Setup, the user should open the web app link (from System URLs) on a web browser in Incognito/Private mode.

3. For access, the user needs to login to the portal with their existing respective credentials, which contain the following:
   a. Username
   b. Password

4. There should be no spaces before or after the username.

5. If the user does not have an account, they can register themselves as a new user by clicking on the ‘Register’ button available on the top-right corner of the Login page.

6. After successful login, the user is redirected to the ‘Program’ section of the ‘My Application’ module.
Login and New Account Creation

1. Existing users can directly access the Smart Setup by entering their registered username and password on the login Page.
2. First time users can also register themselves at this stage by clicking on the ‘Register’ button on the top right corner.
3. Fill in the relevant information and click on the ‘Register’ button. At this point, the user should also enter the password they would want to use for access after registration is complete.

4. The system would auto-generate a one-time token which can be used for activation of the new account.

5. Enter the registered email address and token code for verification and account activation.

6. The user can now enter their email address as username and the chosen password to access the Smart Setup.
1. My Application

   After successful login the user will be directed to the Program page of ‘My Application’ where a new program can be created for any country.

   *Program Definition: A system for data management that can be adapted to the country’s needs. This newly created program can be used on the Prevent TB application to collect and save client data. Data collected can further be visualised on the dashboard for monitoring and evaluation.*

2. By Default, a new program will display the Program Name, App Name as ‘Prevent TB’ and the Standard Disclaimer field will also have a prefilled default disclaimer.

3. The user can add and edit the details as required and must select a country to proceed to the next step.

4. They can also select a logo for display on the application using the list of available options.

5. To go to the next step i.e., ‘Registration’, click on the ‘Next’ button.
Steps to create a new program

1. In this step, the user will see all the pre-defined ‘data variables’ for the registration stage.
2. The user can add new data variables or update/delete existing ones as needed.
3. Sorting the sequence of the variables can also be done at this stage by using the up & down arrows.

Adding and Updating data variables
1. The user can add a new data variable by clicking the ‘+’ icon on the top right corner of the Registration section.
2. To edit existing variables, the user can click on the ‘Edit’ button, which would display the variables characteristics in a side section.
1. On clicking the ‘Next’ button on the Registration tab, the user is redirected to the ‘Stages’ section.
2. This section displays a list of all existing pre-configured stages on the system. The user can add new stages by choosing ‘Add Form’, edit existing stages, or change their sequence of appearance on the application.
3. On this step, the user can also modify the data variables as per the needs of the program. The options available include,
   - New variables under each stage can be added by clicking on the ‘+’ icon.
   - The display name, type, options for dropdowns or checkbox lists can be modified using the ‘Edit’ icon under the ‘Actions’ columns.
   - Any existing variables can be deleted using the ‘Delete’ icon under the ‘Actions’ column.
   - The sequence of display of the variables can be changed using the up and down arrows under the ‘Sequence’ column.
4. To visualize how the variables and their sequence will appear on the app, the user can use the ‘Show Preview’ option which would display a preview of the stage as on a mobile device screen.
5. The user can click on the ‘Next’ button to go to the ‘Alerts’ section.
Alerts

1. On the ‘Alerts’ section, a list of all pre-configured alerts on the application are displayed.
2. The user can customize alerts on the application by changing the ‘Alert Name’ at this step and can also define the threshold number of days after which the specific alert would be visible on the application.
3. By clicking on ‘Next’, the user is directed to the ‘Workflow’ section.

Workflow

Figure 9: Alerts

Figure 10: Workflow
This section can be used to define user access to the different stages of the application. Two default types – ORW and Facility are available in the section. These can be modified as per the requirements of the program.

**Publish/Update a program**

After making all required changes, the user must click on the ‘Publish’ button to save the changes and done in the previous steps. Existing programs can also be updated at this point by clicking on the ‘Update’ button.

![Publish/Update a program](image)

**Figure 11: Publish/Update a program**

After a new program is successfully published, the system displays a set of demo user credentials which can be used to log in to the Prevent TB application.

![Demo user](image)

**Figure 12: Demo user**
2. My Profile Page

‘My Profile’ section displays the profile details of the Smart Setup user based on details entered during new account creation. These would include the First Name, Last Name and Email id of the user.

3. Index Case Upload

Figure 13: My Profile Page

Figure 14: Index Case Upload
1. The ‘Index Case Upload’ feature on the Prevent TB Smart Setup allows program administrators to upload an existing list of index cases to further ease the process of contact investigation.
2. A template can be downloaded in this section by clicking on the ‘Download Template’ button.
3. Users can add the list of index cases and their details on the downloaded .xlsx file.
4. Click on the ‘Upload’ button of the ‘Index Case Upload’ section and select the updated .xlsx file.
5. The index cases will be uploaded to the system and can be viewed under the ‘My Clients’ module on the Prevent TB application.

4. Label Translation

![Label Translation](image)

**Figure 15: Label Translations**

The label translations page allows the user to add translations for varied labels seen on the application. New labels can be added by clicking on the ‘Add Row’ button while the existing ones can be deleted by clicking on the delete icon under the ‘Action’ column. A search option is also available in this section facilitating an easy search of any specific label from the pre-defined list.
5. Generate QR Code

1. The ‘Generate QR Code’ section on the Smart Setup allows users to generate sample unassigned QR codes which can be assigned to individual clients at the time of registration.
2. Users can enter a number specifying the number required and click on the ‘Generate QR Code’ button from where the same can be downloaded/printed.
3. This section also allows users to generate QR cards where some additional data variables like client name, age, unique identification number can be added.
4. The list of data variables to be displayed on the QR Card can be configured using the ‘Configure QR Card’ button.
5. To generate required QR cards, users can then select the number required and click on the ‘Generate QR Card’ button.
6. User Management

1. In this section, all the default app user credentials as generated after program creation can be viewed.
2. The user credentials and details including the name of the user, email, phone number and password can be modified by clicking on the ‘Edit’ icon against the specific user.
3. Program managers can also add new users by selecting the ‘Add User’ button on the top right corner on this section.

7. Facility Management

In this module, all the default facilities created after program creation can be viewed and the details of these facilities can be updated as required.
Two action buttons are available in this section. These include:

➢ **Create New Organization**
  - With the ‘Create New Organization’ button, users can define any new State, District, and City in the existing organization structure as required. This newly defined organization name can further be selected while creating a new facility under the ‘Create New Facility’ option to facilitate defining the required geographical and administrative structure.

➢ **Create New Facility**
  - This option allows the creation of a new facility. Users are required to fill out details like the facility code, facility name and address and contact details. The administrative structure can be defined by choosing the name of country, state, and city under which the new facility falls.
  - The newly created facility will now be visible under the User Management Module (‘Add New User’ form) from where a new user can be assigned to the health facility.