PHES Documentation

Release 0.1

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This user documentation covers the background and purpose of PHES together with instructions and explanations of how to perform **data entry**, **reporting** and other topics related to the **usage of the software**. This section explains some of the conventions which are used throughout the document. PHES is a browser-based application. In many cases, screenshots have been included for enhanced clarity. Shortcuts to various functionalities are displayed such as "Apps -> Data Entry". The "->" character indicates that you should choose "Apps" and then click on "Data Entry" in the menu which appears through the browser.

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1.1 Introduction

PHES is an open source solution made to support the PEPFAR system on similar partner reporting system based on the DHIS2 which is currently being used for health reporting in Kenya. Population Health and Environment System (PHES) is an implementation of the Kenya Program Monitoring and Evaluation System (KePMS) on a DHIS2-like platform. It was mainly designed for reporting Non-HIV PEPFAR program data. Unlike KePMS, this platform is web based and users can access a common instance all over the country. The Implementing agencies can view aggregated data for all their partners, per partner and per site. PEPFAR can view data aggregated per site, per partner and per Agency. PHES also extends the robust features of DHIS2 because it is based on the DHIS2 platform

1.2 List of Abbreviations and Terminologies

1.2.1 Abbreviations

- KePMS Kenya HIV/AIDS Program Monitoring System
- PEPFAR President's Emergency Plan for AIDS Relief
- **DHIS2** District Health Information System Version 2
- JPRP Joint Partner Reporting Portal
- PHES Partner Health Environmental System
- **IPs** Implementing Partners
- MoH Ministry of Health
- IPSL Implementing Partners Support List

1.2.2 Terminologies

- Implementing partner an organization working on behalf of an agency to perform services
- Funding agency an agency providing support to partners

1.3 Getting Started

1.3.1 System Log in

You are required to provide your username and password in order to access the system. Figure 1 below is a screenshot of the start page/login page .Once logged in, the user can see their dashboard because this is the default landing page. .. image:: _img/phes-login.png

System Log Out On the far right of the top bar on the system, there is **Profile** menu. When you hover your mouse pointer on the menu,

a drop down appears that has a log out button. Click on the button to signout. Below is a screenshot of the same:



1.4 Datasets

PHES contains the following datasets, categorized here by their level of reporting

1.4.1 National Level

- · Family Planning and Reproductive Health Target
- Family Planning and Reproductive Health Narrative
- Malaria Narrative
- · Malaria Target
- Maternal and Child Health Narrative
- Maternal and Child Health Target
- · National Performance
- Nutrition Narrative
- Nutrition Target

- · WASH Narrative
- · Wash Target
- Training

1.4.2 County Level

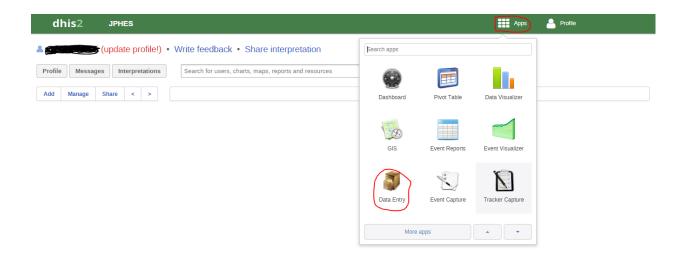
- · County Performance
- Family Planning and Reproductive Health Target
- · Family Planning and Reproductive Health Narrative
- Malaria Narrative
- · Malaria Target
- · Maternal and Child Health Narrative
- Maternal and Child Health Target
- · Nutrition Narrative
- · Nutrition Target
- · WASH Narrative
- · Wash Target
- Training

1.4.3 Facility Level

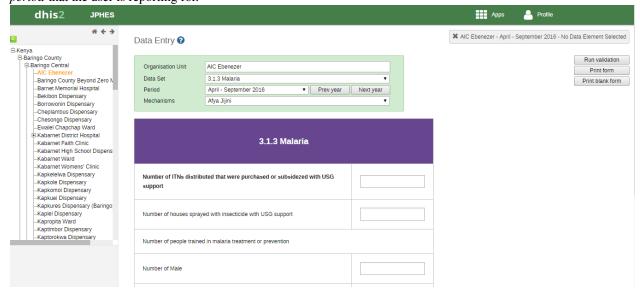
- Malaria
- Family Planning and Reproductive Health Performance
- · Maternal and Child Health Performance
- Nutrition Performance

1.5 Data Entry

The PHES data entry module is designed in such a way that an Implementing Partner can only enter their data. PHES datasets were migrated from KePMS, retaining dataset names and look and feel as were in KePMS. After logging into the system, hover mouse pointer/click on the *Apps* icon on the far left as shown on the figure below. On the dropdown that appears, click on *Data Entry* icon.



This navigates to the data entry page, as shown on the figure below. For data entry forms to appear, you will be required to first select an organization unit/facility you are reporting for on the left panel, the dataset, reporting period and the implementing partner you are reporting for, which comes up after selecting the *organization unit*, *Dataset* and *period* that the user is reporting for.



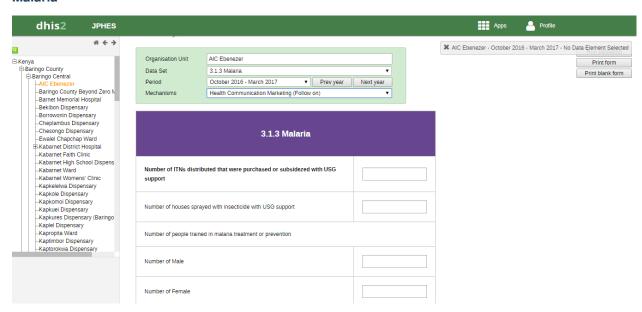
1.5.1 Data Entry Forms

Below are sample screenshots for different data entry forms;

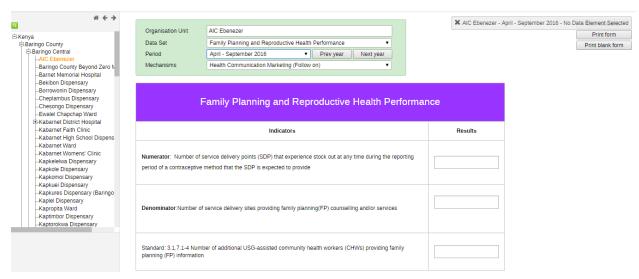
1.5.2 Facility Level

Facility level datasets include Malaria, Family Planning and Reproductive Health Performance, Maternal and Child Health Performance and Nutrition Performance.

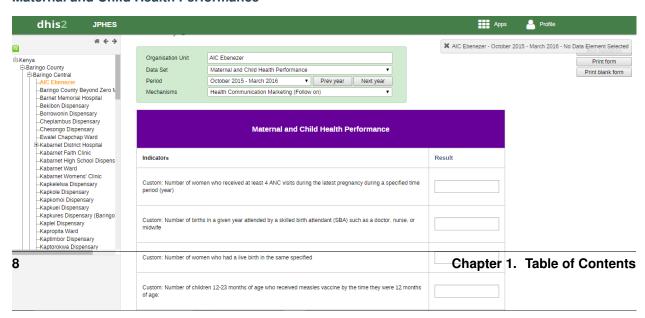
Malaria

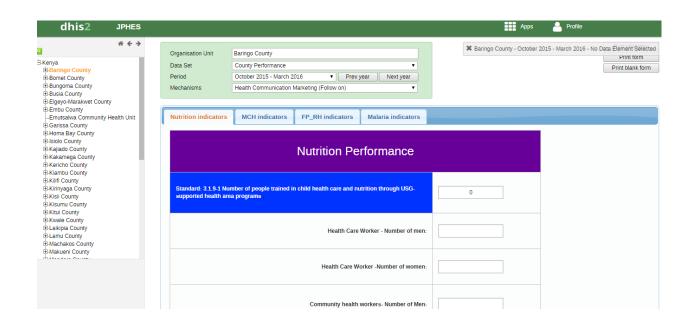


Family Planning and Reproductive Health

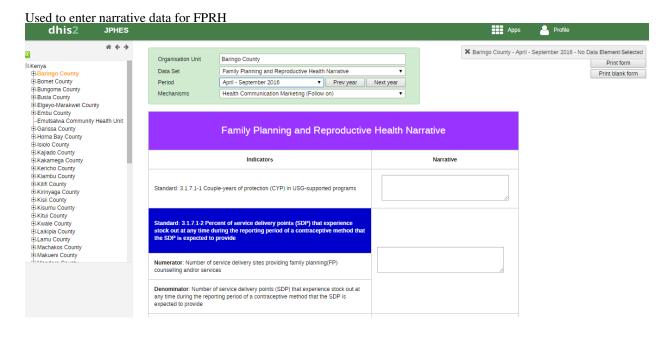


Maternal and Child Health Performance





Family Planning and Reproductive Health Narrative



Family Planning and Reproductive Health Target

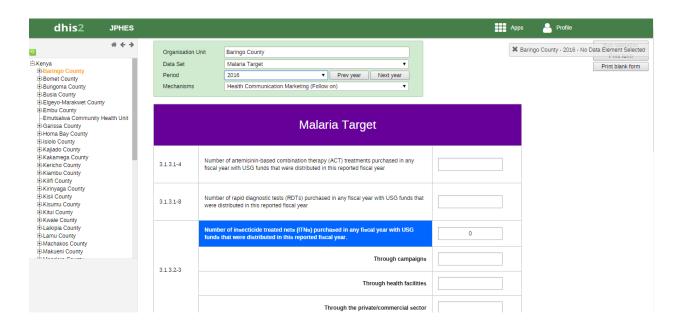


Malaria Narrative

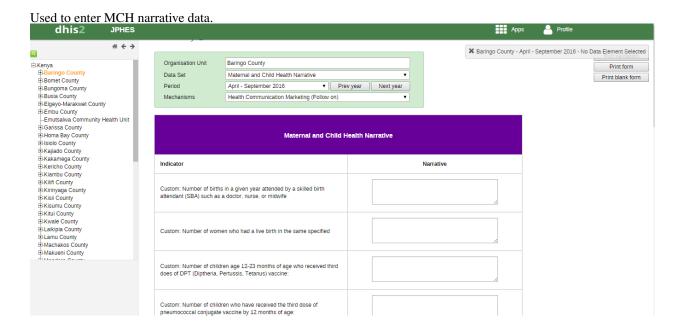


Malaria Target

Used to enter target data for Malaria

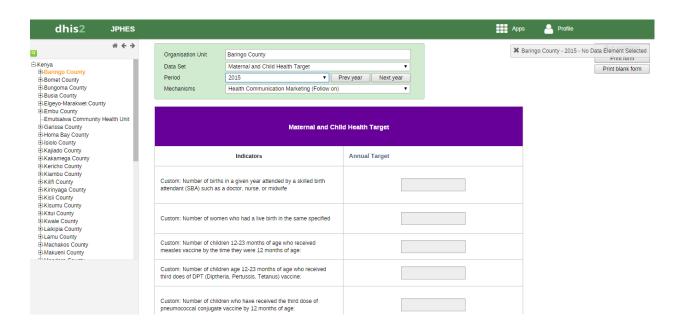


Maternal and Child Health Narrative

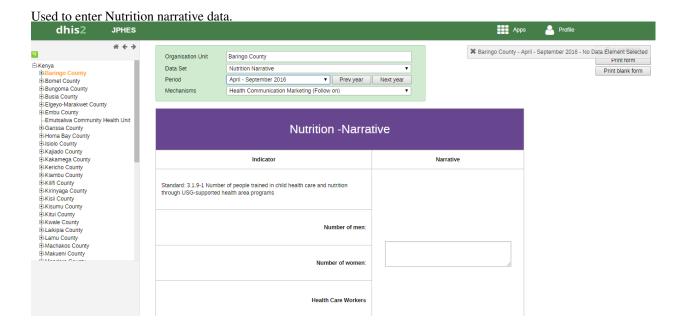


Maternal and Child Health Target

Used to enter MCH target data.

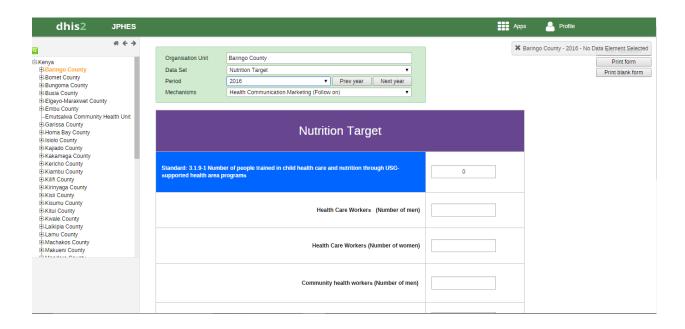


Nutrition Narrative



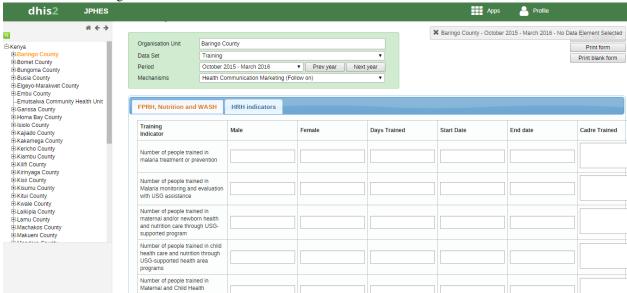
Nutrition Target

Used to enter Nutrition target data.

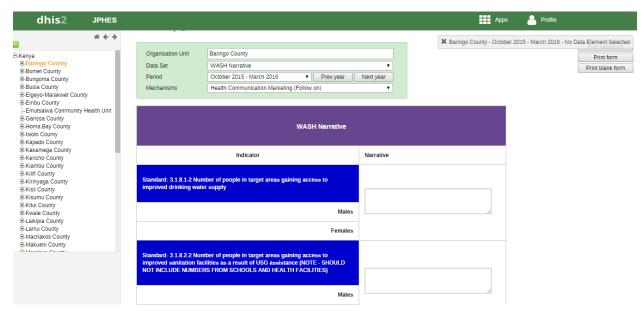


Training

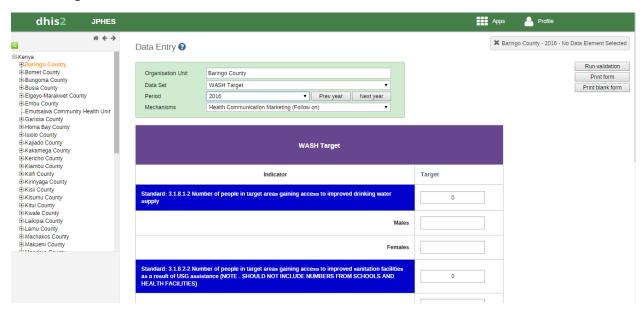
Holds data for training dataset



WASH Narrative



WASH Target

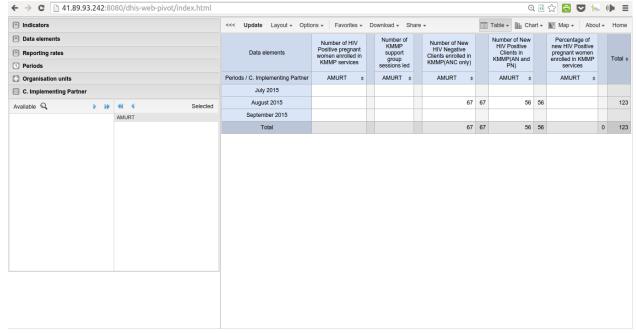


1.6 Analysis and Reports

1.6.1 Pivot Table Analysis

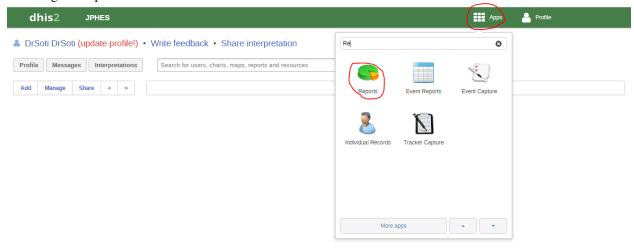
The pivot table app enables users to create pivot tables, using all available data dimensions in PHES. A pivot table is a dynamic tool for data analysis which lets you quickly summarize and arrange data according to its dimensions. Examples of data dimensions in PHES are data dimension itself (e.g data elements, indicators and events), periods (representing the time period for whice the data represents) and the organisational hierarchy (representing the geographical location of the data). From these dimensions you can freely select dimension items to include in the pivot table. Additional dimensions can be created in PHES, using the group set functionality, to allow for different aggregation pathways, such as aggregation by "Partner" or facility type. A pivot table can arrange data dimensions on

columns, rows, and as filters. When you place a data dimension on columns, the pivot table will display one column per dimension item. If you place multiple data dimensions on columns, the pivot table will display one column for all combinations of the items in the selected dimensions. When you place a data dimension on rows, the pivot table will display one row per dimension item in a similar fashion. The dimensions you select as filters will not be included in the pivot table, but will aggregate and filter the table data based on the selected filter items. The work-flow for creating a simple pivot table is: * Select dimension items in the left menu, for instance a few data elements or indicators. * Click "Layout" on the top menu and arrange the data dimensions as columns, rows, and filters. You can leave the selection as it is if desired. * Click "Update". A pivot table similar as below will be displayed. Notice how indicators are listed on columns and periods as rows.



1.6.2 Reports

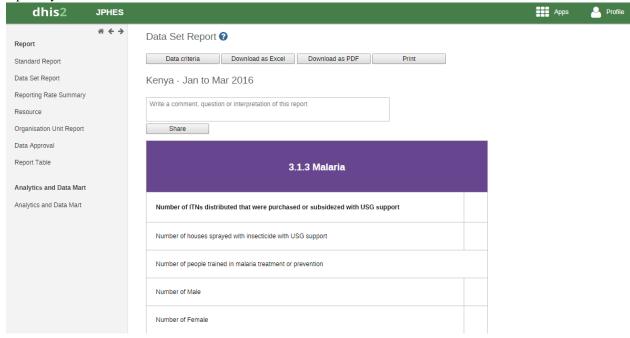
Reports functionality can be accessed by clicking on Apps -> More apps -> Reports or by clicking on Apps then searching for Reports on the search bar.



There are two main types of reports than can be generated from PHES; Dataset Reports and Standard reports:

Dataset Reports

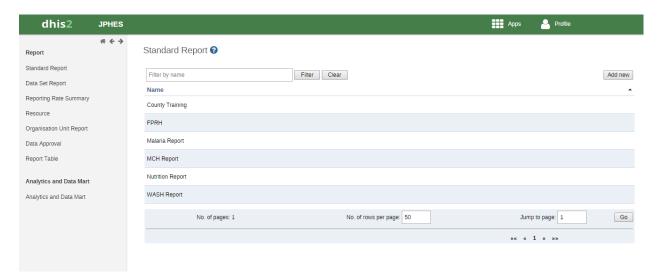
Dataset reports are printer friendly views of the data entry screen filled with either raw or aggregated data. These are only available for data sets that have custom data entry forms and not for default or section forms. You can access data set reports from Apps->Reports. A Criteria window will appear where you fill in the details for your report: * Dataset: The data set you want to display. * Reporting period: The actual period you want data for. This can be aggregated as well as raw periods. This means that you can ask for a quarterly or annual report even though the data set is collected monthly. A data set's period type (collection frequency) is defined in data set maintenance. First select the period type (Monthly, Quarterly, Yearly etc.) in the drop down next to Prev and Next buttons, and then select one of the available periods from the dropdown list below. Use Prev and Next to jump one year back or forward. * Use data for selected unit only: Use this option if you want a report for an orgunit that has children, but only want the data collected directly for this unit and not the data collected by its children. If you want a typical aggregated report for an orgunit you do not want to tick this option. * Reporting Organisation unit: Here you select the orgunit you want the report for. This can be at any level in the hierarchy as the data will be aggregated up to this level automatically (if you do not tick the option above). When you are done filling in the report criteria you click on * Generate *. The report will appear as HTML in a printer-friendly format. Use the print and save as functions in the browser to print or save (as HTML) the report. You can also export the data set report in Excel and PDF formats. Below is a sample dataset report layout:



Standard Reports

You access the available reports by navigating to Apps->Reports. In the report menu in the left bar, click Standard Report. A list of all pre-defined reports will appear in the main window.

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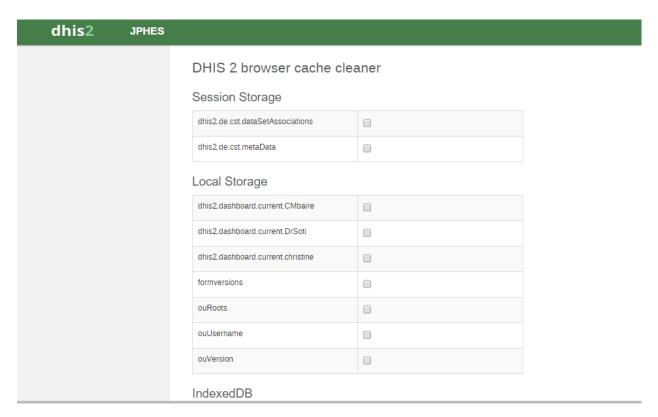


You run/view a report by clicking on the name of the report and then selecting "Create" from the contextual menu. If there are any pre-defined paramaters, you will see a report parameter window where you must fill in the values needed for organit and/or reporting month, depending on what has been defined in the underlying report table(s). Click on "Get Report" when you are ready. The report will either appear directly in your browser or be available as a PDF file for download, depending on your browser settings for handling PDF files. You can save the file and keep it locally on your computer for later use.

1.7 Clearing Cache

During periods of customizing PHES you will often do a lot of changes to forms and reports. As a result, sometimes the content stored locally in your web browser is not updated accordingly and there is a need to clear your browser cache. PHES heavily utilizes the offline storage features, enabling you for instance to capture data even while being disconnected from the Internet. However, most browsers do not clear the offline content (local storage, indexed database) by default when clearing the cache. There several ways by which you can clear your browser cache. The simplest way to clear cache on your browser is pressing the combination of keys <Ctrl><Shift><Delete> on the keyboard. Another way is by using PHES's browser cache cleaner app, which can be accessed from Apps->More Apps->Browser Cache Cleaner. This displays a page with several options as below;

1.7. Clearing Cache



Select whatever you want cleared and click on Clear button.

For Chrome browser users, another way is by using an app found in Chrome Web Store as follows

- Install the app from here
- An icon will be added to the top right corner. Right-click it and select "Options".
- Under "Data to remove" select everything except "Cookies".
- Under "Time period" select "Everything", and close the browser tab.
- Click the Clear cache icon in the top-right corner.

All cached data, including offline content, will now be cleared, and you will get a fresh view of the system.

1.8 Appendix 1: References

Dhis2.org. (2016). Chapter 1. What is DHIS 2?. [online] Available at: https://www.dhis2.org/doc/snapshot/en/user/html/ch01.html [Accessed 10 May 2016]. Dhis2.github.io. (2016). DHIS2 Documentation. [online] Available at: http://dhis2.github.io/dhis2-docs/[Accessed10May2016]. Dhis2.org. (2014). How to really clear the browser cache. [online] Available at: https://www.dhis2.org/tutorials/how-to-really-clear-browser-cache[Accessed10May2016].

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