

Instructions for Installing an EquityTool Country Survey into your DHIS2 Instance

Notes:

- These instructions are aimed at 'Admin' users who are responsible for setting up and maintaining a DHIS2 server/instance.
- Each EquityTool country survey comes as a ready-to-load XML configuration file for DHIS2. Each country survey you install (eg Kenya DHS 2014) sets up a separate Program in DHIS2, with its own Data Elements, Program Indicators, etc.
- You can install as many different country surveys as you like into a single DHIS2 instance (if you install the same country survey twice, it will still only appear once).
- You can install EquityTool surveys alongside any other existing DHIS2 Datasets and Programs, which will not be affected in any way; each EquityTool Program is completely independent, and no existing settings or elements will be changed.¹
- You can **add** your own items to an EquityTool Program/survey once it is installed (for example adding your own supplementary questions to the survey tool), but please **do not modify** any of the existing Data Elements or Indicators, as this is likely to break the Indicators and/or affect the survey results.
- A standard **naming convention** is used for all DHIS2 elements associated with a particular country survey: 'EQT' (EquityTool) plus country code (eg 'KE' for Kenya) plus the year of the national survey used to construct the EquityTool (eg '14' for 2014) – so all elements for the Kenya (DHS 2014) survey have the prefix 'EQT-KE14'.
- The EquityTool is currently only compatible with DHIS2 version 2.25.

Prerequisites:

- Your DHIS2 instance should already be set up (see the 'Implementer Guide' at <https://www.dhis2.org/documentation>), and contain at least one Organisation Unit.
- You should be logged in as an 'Admin' user (ie a role that includes the 'ALL' authority).

Steps involved:

- There are three steps involved in installing an EquityTool country survey into DHIS2:
 - loading the XML configuration file for your chosen EquityTool country survey;
 - allocating Users and Organisation Units to the EquityTool country survey;
 - ensuring the appropriate language is selected.

¹ Specifically: all default Categories, CategoryOptions and CategoryCombos have been removed from the XML, along with all User/Owner references, so for the EquityTool these will automatically default to those already in your instance; no Users are included in the XML, just a UserRole and UserGroup for each country survey.

Loading the XML Configuration File

Summary

Loading the EquityTool XML file is very quick and easy – all you need to do is the following:

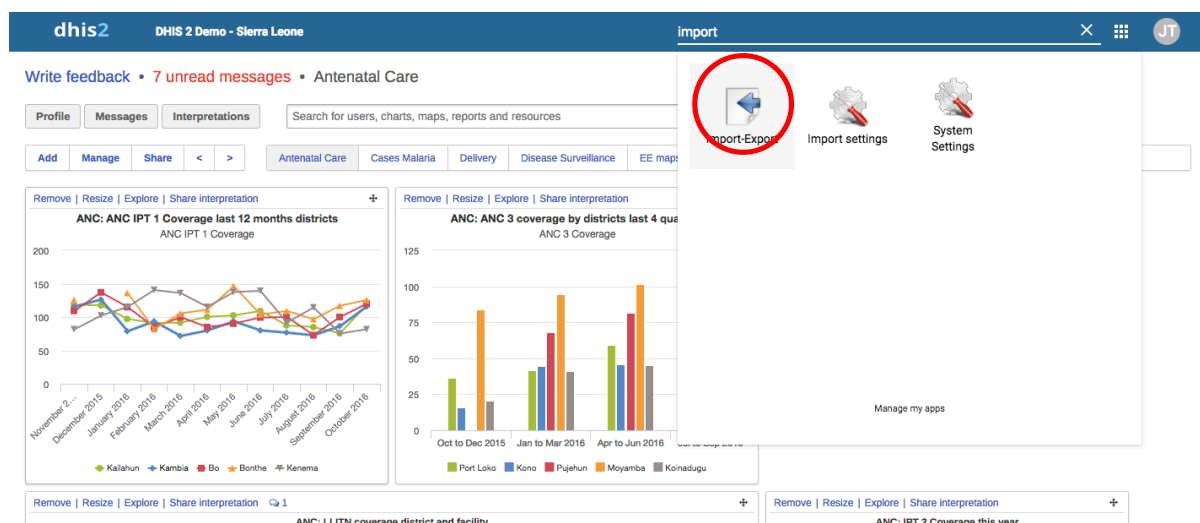
1. Open the Import-Export app, and the 'Import Metadata' screen.
2. Use 'Choose file' to select the XML file, change format to 'XML', and click 'Import'.
3. Check the import has successfully completed, and use 'Display import summary' to confirm that no elements have been ignored.

Once you have completed these steps, you can proceed to the next section, 'Allocating Users and Organisation Units'.

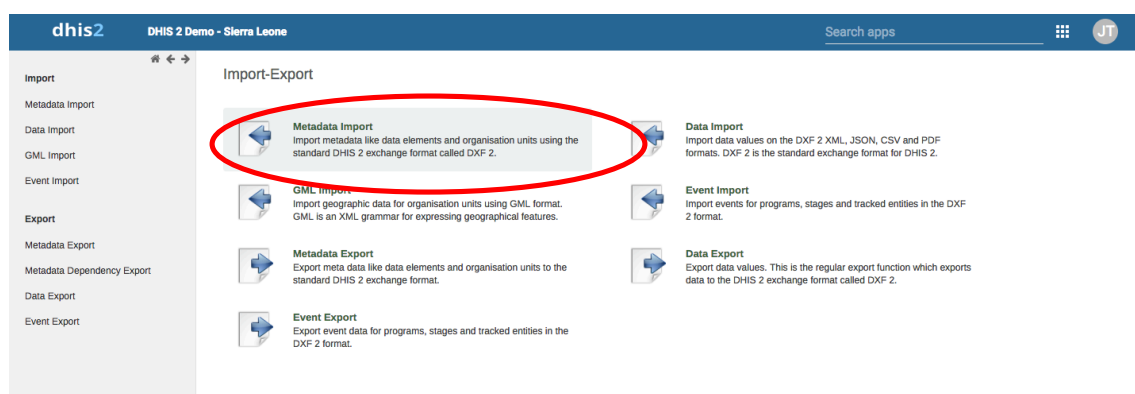
The rest of this section contains a detailed version of the steps above.

1. Open Import-Export App

After logging in as an Admin user, open the DHIS2 'Import-Export' app:

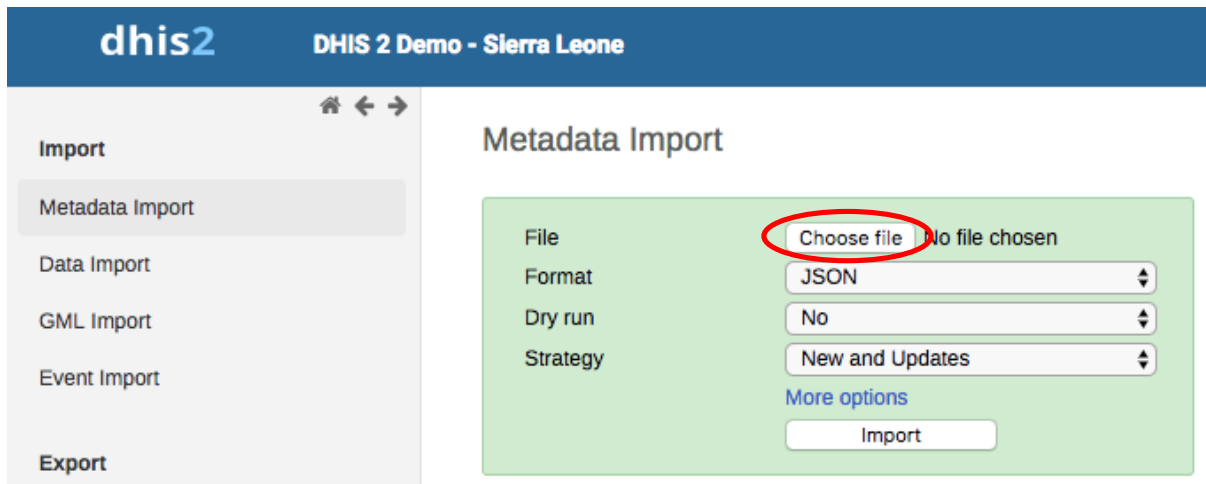


Select 'Metadata Import':



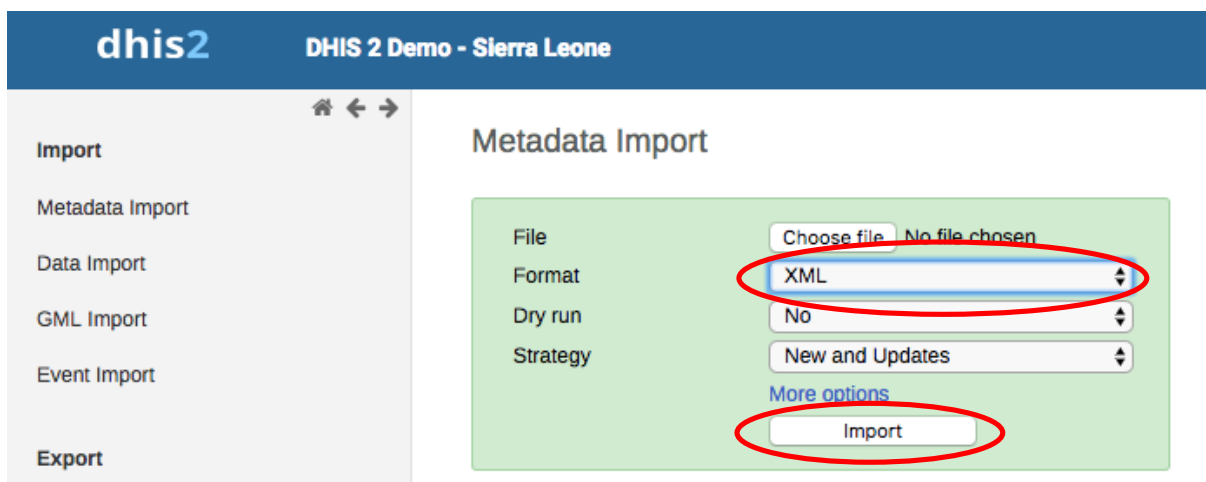
2. Choose an XML file and import it

Click on 'Choose file', and navigate to select the EquityTool XML file you want to install:



The screenshot shows the DHIS2 interface for 'Metadata Import' in a 'Demo - Sierra Leone' instance. On the left is a sidebar with 'Import' selected, containing sub-options: 'Metadata Import', 'Data Import', 'GML Import', 'Event Import', and 'Export'. The main area is titled 'Metadata Import' and contains a form with the following fields: 'File' (with a 'Choose file' button circled in red and 'No file chosen' text), 'Format' (set to 'JSON'), 'Dry run' (set to 'No'), and 'Strategy' (set to 'New and Updates'). Below these fields are links for 'More options' and an 'Import' button.

After choosing the file, change the format from 'JSON' to 'XML', and then click 'Import'.



This screenshot shows the same DHIS2 interface after changes. The 'File' field remains 'No file chosen'. The 'Format' dropdown menu is now set to 'XML' (circled in red). The 'Dry run' is still 'No' and 'Strategy' is 'New and Updates'. The 'Import' button at the bottom is also circled in red. The sidebar remains the same.

3. Check the import has successfully completed

The XML file should now load, and show a brief summary of the items imported:

Metadata Import

File	<input type="button" value="Choose file"/> No file chosen
Format	JSON
Dry run	No
Strategy	New and Updates
	More options
	<input type="button" value="Import"/>

[Display import summary](#)

```

2016-11-17 11:13:36 (EquityTest) Import:Done took 0.18 seconds ✓
2016-11-17 11:13:36 (EquityTest) Updating 10 object(s) of type ProgramRule
2016-11-17 11:13:36 (EquityTest) Updating 10 object(s) of type ProgramRuleAction
2016-11-17 11:13:36 (EquityTest) Updating 11 object(s) of type ProgramRuleVariable
2016-11-17 11:13:36 (EquityTest) Updating 26 object(s) of type ProgramIndicator
2016-11-17 11:13:36 (EquityTest) Updating 1 object(s) of type Program
2016-11-17 11:13:36 (EquityTest) Updating 7 object(s) of type ProgramStageSection
2016-11-17 11:13:36 (EquityTest) Updating 11 object(s) of type ProgramStageDataElement

2016-11-17 11:13:36 (EquityTest) Updating 1 object(s) of type ProgramStage
2016-11-17 11:13:36 (EquityTest) Updating 11 object(s) of type DataElement
2016-11-17 11:13:36 (EquityTest) Updating 1 object(s) of type UserGroup
2016-11-17 11:13:36 (EquityTest) Updating 1 object(s) of type UserAuthorityGroup
2016-11-17 11:13:36 (EquityTest) Import:Start
  
```

If this doesn't display, it means the XML hasn't loaded at all (your server will be unaffected) – carefully review all of the above steps, and also check to ensure that you're using a supported version of DHIS2 (eg 2.25), and that you're logged in as an 'Admin' user.

If this displays, then the XML has loaded. Next, click on 'Display import summary':

Metadata Import

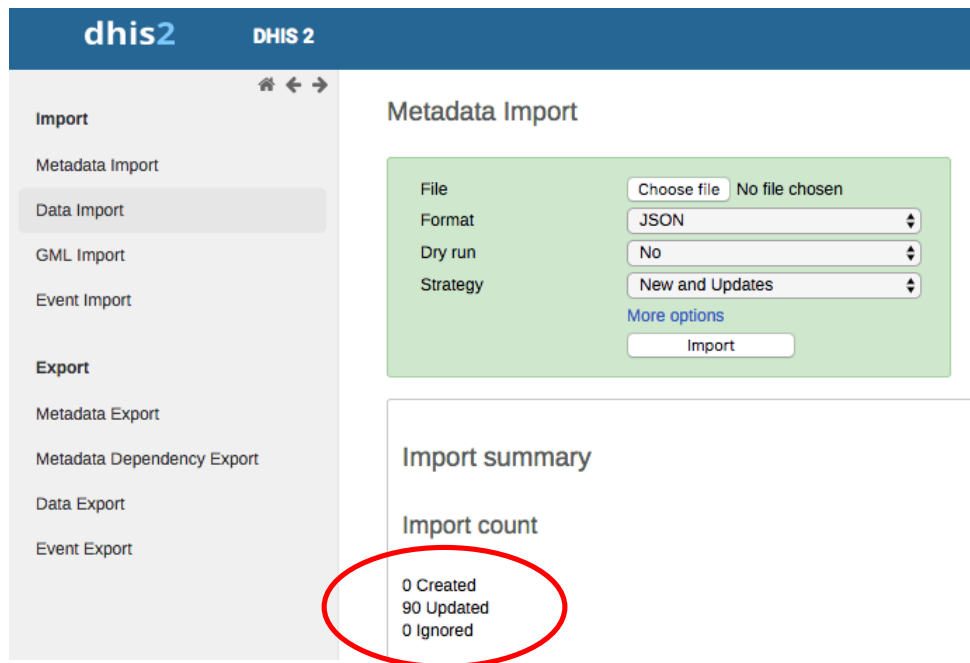
File	<input type="button" value="Choose file"/> No file chosen
Format	JSON
Dry run	No
Strategy	New and Updates
	More options
	<input type="button" value="Import"/>

[Display import summary](#)

```

2016-11-17 11:13:36 (EquityTest) Import:Done took 0.18 seconds ✓
2016-11-17 11:13:36 (EquityTest) Updating 10 object(s) of type ProgramRule
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2016-11-17 11:13:36 (EquityTest) Updating 7 object(s) of type ProgramStageSection
2016-11-17 11:13:36 (EquityTest) Updating 11 object(s) of type ProgramStageDataElement
  
```

You need to **ensure that this shows '0 Ignored'** (ie that no elements have failed to load). If any elements are shown as 'Ignored', an error will be shown underneath, explaining why. All elements should successfully load, but if any are ignored, take a copy of the error messages, and contact us for support.



The screenshot shows the DHIS2 interface with the 'Metadata Import' page. The left sidebar contains a menu with 'Import' and 'Export' sections. The 'Import' section is expanded, showing 'Metadata Import', 'Data Import', 'GML Import', and 'Event Import'. The 'Export' section shows 'Metadata Export', 'Metadata Dependency Export', 'Data Export', and 'Event Export'. The main content area is titled 'Metadata Import' and contains a form with the following fields: 'File' (Choose file, No file chosen), 'Format' (JSON), 'Dry run' (No), and 'Strategy' (New and Updates). There is a 'More options' link and an 'Import' button. Below the form is an 'Import summary' section with the heading 'Import count' and the following values: 0 Created, 90 Updated, and 0 Ignored. The '0 Ignored' value is circled in red.

Import count
0 Created
90 Updated
0 Ignored

If you see '0 Ignored', then you have successfully loaded your chosen EquityTool country survey into DHIS2.

Allocating Users and Organisation Units

Summary

Now that the EquityTool survey is installed, you need to assign it to Users, and make it available for specific Organisation Units. This can be done in a few quick-and-easy steps:

4. Give Users the EquityTool User Role and add them to the EquityTool User Group.
5. Assign Organisation Units to the EquityTool country survey Program.

Once you have completed these steps, your Equity Tool survey is ready for use by the DHIS2 users you have selected.

The rest of this section contains a detailed version of the steps above.

4. Give Users the EquityTool User Role and add them to the EquityTool User Group

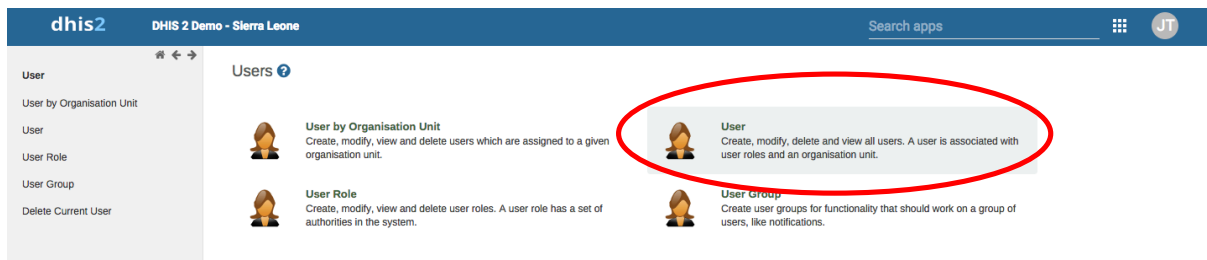
Each EquityTool country survey has a corresponding 'User Role' and 'User Group' in DHIS2. (These follow the standard naming convention outlined under 'Notes' above, eg the User Role for the Kenya survey based on the 2014 DHS will be prefixed 'EQT-KE14'.)

Users will not be able to see the EquityTool program in 'Event Capture' or view the EquityTool Indicators in Dashboards unless they are given this Role and added to this User Group.

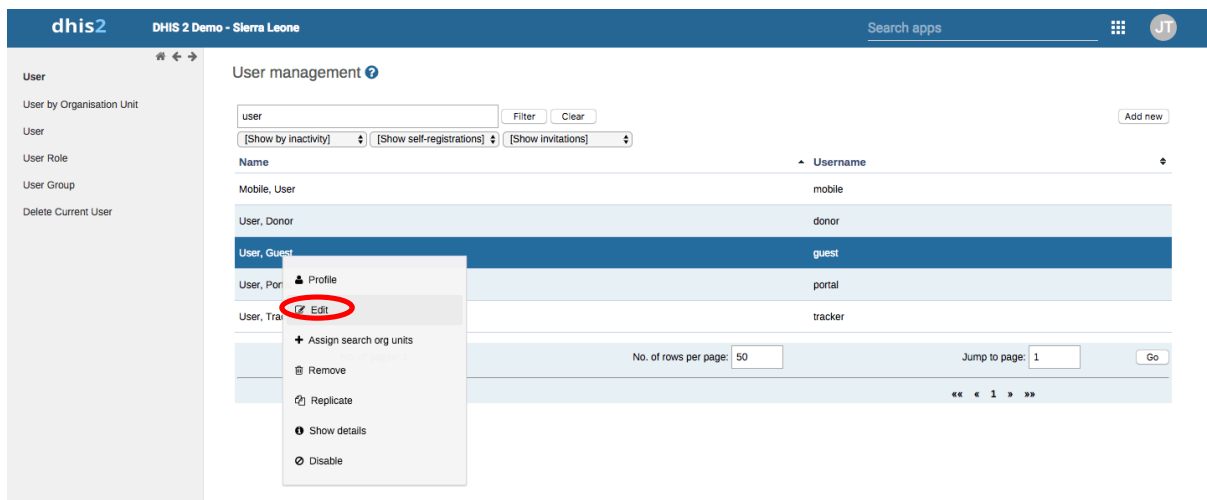
To give a User access to an EquityTool survey, log in as an 'Admin' user, and open the DHIS2 'User' app:

The screenshot shows the DHIS2 interface for 'DHIS 2 Demo - Sierra Leone'. The top navigation bar includes 'Write feedback', '6 unread messages', and 'Antenatal Care'. Below this is a search bar and a 'Search apps' dropdown. The main content area displays a grid of application icons. The 'Users' icon, which depicts a person, is circled in red. Other visible icons include Dashboard, Pivot Table, Data Visualizer, GIS, Event Visualizer, Event Reports, Data Entry, Event Capture, Tracker Capture, Maintenance, and System Settings. The bottom of the screen shows several data visualizations, including bar charts for 'ANC: ANC 3 coverage by districts last 4 quarters' and 'ANC: ANC IPT 1 Coverage last 12 months', and a map for 'ANC: LITN coverage district and facility'.

Select 'User' to go to the User screen:



Choose a user from the list (using the filter if necessary), click on their entry, and select 'Edit':



In the 'Update user' screen, scroll down to 'Available roles', select the relevant 'EQT...' Role, then click on the right-arrow to assign that Role to the User:

Update user form fields:

- Password:
- Retype password:
- Surname *:
- First name *:
- E-mail:
- OpenID:
- LDAP identifier:
- Mobile phone number:
- Interface language:
- Database language:

Available roles section:

EQT-BA14 EquityTool (Bangladesh DHS 2014) User

EQT-KE14 EquityTool (Kenya DHS 2014) User

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Selected roles section:

Next, scroll down further, and click on 'Show more options':

This will show a list of 'Available user groups'; select the relevant 'EQT...' User Group, then click on the right-arrow to add the User to that User Group.

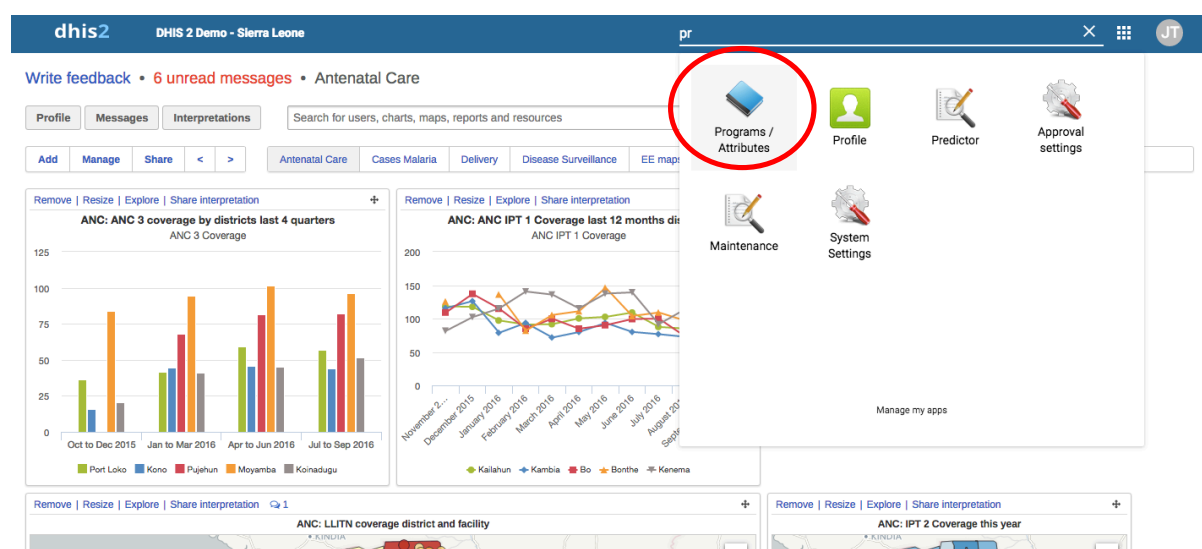
Click 'Save' to finish setting up the User. Repeat for all Users that will be using this particular EquityTool country survey.

5. Assign Organisation Units to the EquityTool country survey Program

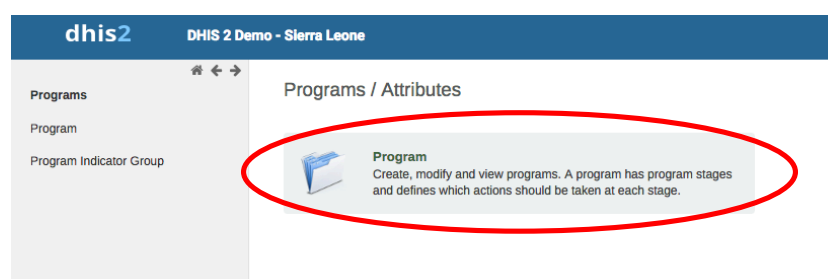
All EquityTool survey forms captured via DHIS2 need to be attached to an Organisation Unit. You can choose either broad geographical Organisation Units (eg by province), lower-level Organisation Units such as facilities, or both.

We recommend that the team implementing these EquityTool surveys carefully discusses this choice, as the Organisation Units you choose will determine how the EquityTool results can be filtered or grouped/disaggregated. For example, if all surveys are attached to a single national Organisation Unit, this will make data collection very easy, but you won't be able to disaggregate results by province or region; conversely, if surveys are attached to individual facilities, then data collection staff need to take care to select the correct facility when capturing data, but you will then be able to disaggregate your results by district, by region, by facility type, etc (subject, of course, to sample sizes being large enough).

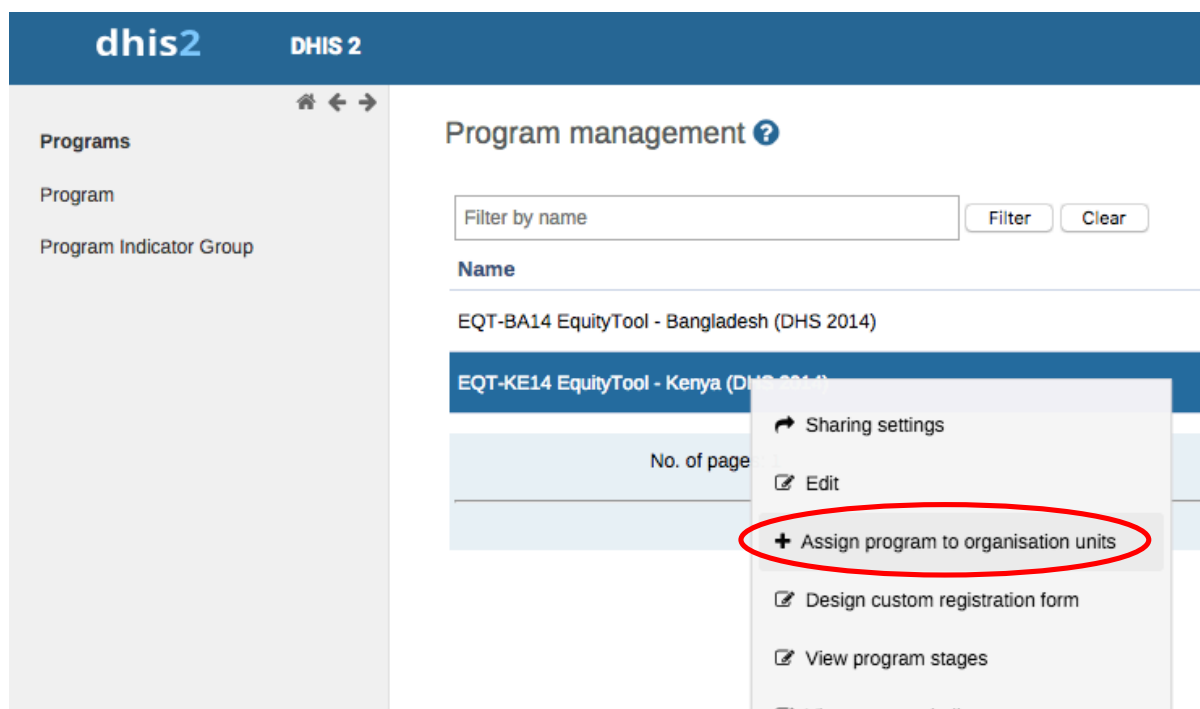
To begin, open the DHIS2 'Programs/Attributes' app:



Select 'Program' to go to the program management screen:



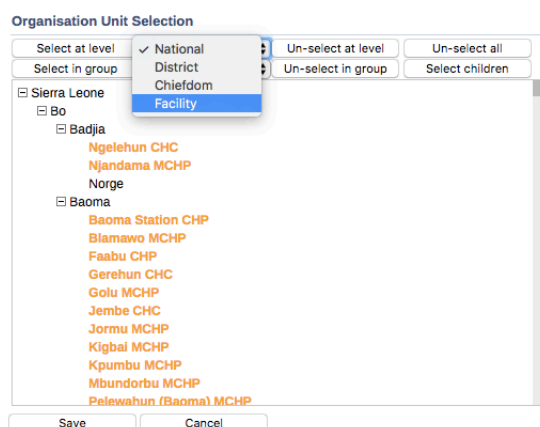
Click on the appropriate EquityTool Program, and select 'Assign program to organisation units':



Use the Organisational Unit hierarchy that appears to select the Organisation Units that you wish to be able to collect data:

Assign program to organisation units for registering

Child Programme



IMPORTANT: normally in DHIS2, if you select an Organisation Unit higher up in the hierarchy, you will also be able to capture data against all of its children. However, **DHIS2's Android 'Event Capture' app only loads Organisation Units that you have explicitly selected** (not their children), so for this reason we recommend that you **individually select every Organisation Unit to which you want to attach surveys**. You can use the filters at the top to select groups or levels of Organisational Units (for example, all Organisation Units at the 'facility' level).

Once you have selected Organisation Units, click 'Save'.

The Users you have chosen should now be able to collect EquityTool surveys for the Organisational Units you have chosen.

Ensuring the appropriate language is selected

Summary

Many EquityTool surveys are available in more than one language. In order to ensure your data collection staff have access to EquityTool questions in the appropriate language, you need to:

6. **either** change your system's default language (in System Settings | Appearance) to the chosen language;
7. **or** have individual users change their user Settings to the chosen language.

Note that all EquityTool reports will have a more user-friendly appearance if your analytics are set to use 'short names' rather than full names, as the full name for EquityTool elements includes the code; if other parts of your DHIS2 system also have meaningful 'short names', you can:

8. change your system's default setting for 'Property to display in analysis modules' (in System Settings | Appearance) from 'Name' to 'Short name'.

The rest of this section contains a detailed version of the options above.

Each EquityTool country survey includes translation(s) into the most relevant local language(s) – for example, the Kenya EquityTool survey includes both English and Swahili. (It is important that data collection staff have access to questions in the correct language, as they should be reading out questions exactly as they are written, and not attempting to translate questions as they ask them.)

As with all DHIS2 translations, you can access the EquityTool translations in two ways:

- **either** ensure your DHIS2 **system's** default language is set to the chosen language;
- **or** change an **individual user's** language to the chosen language.

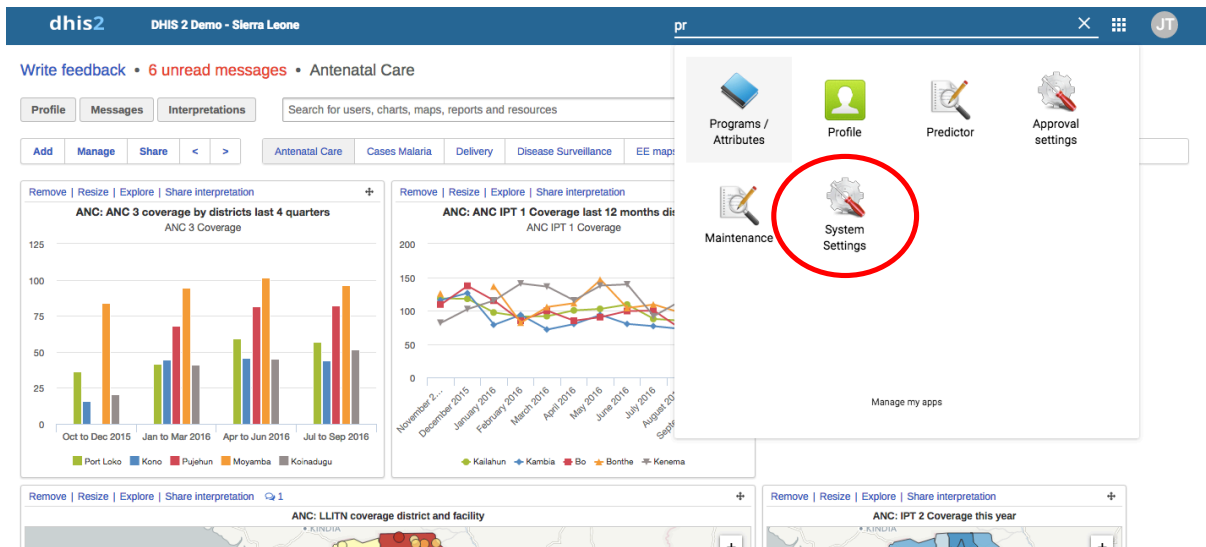
Setting the **system language** is useful if you want all aspects of your DHIS2 system to be in the chosen language – for example, all users in Mozambique should see all aspects of DHIS2 in Portuguese.

Setting the **individual user's language** is useful if you want to use one language for your overall system, but still enable data collection staff to undertake surveys in a different local language – for example, you might set up a Kenya DHIS2 system in English, but want data collection staff to use the EquityTool in Swahili.

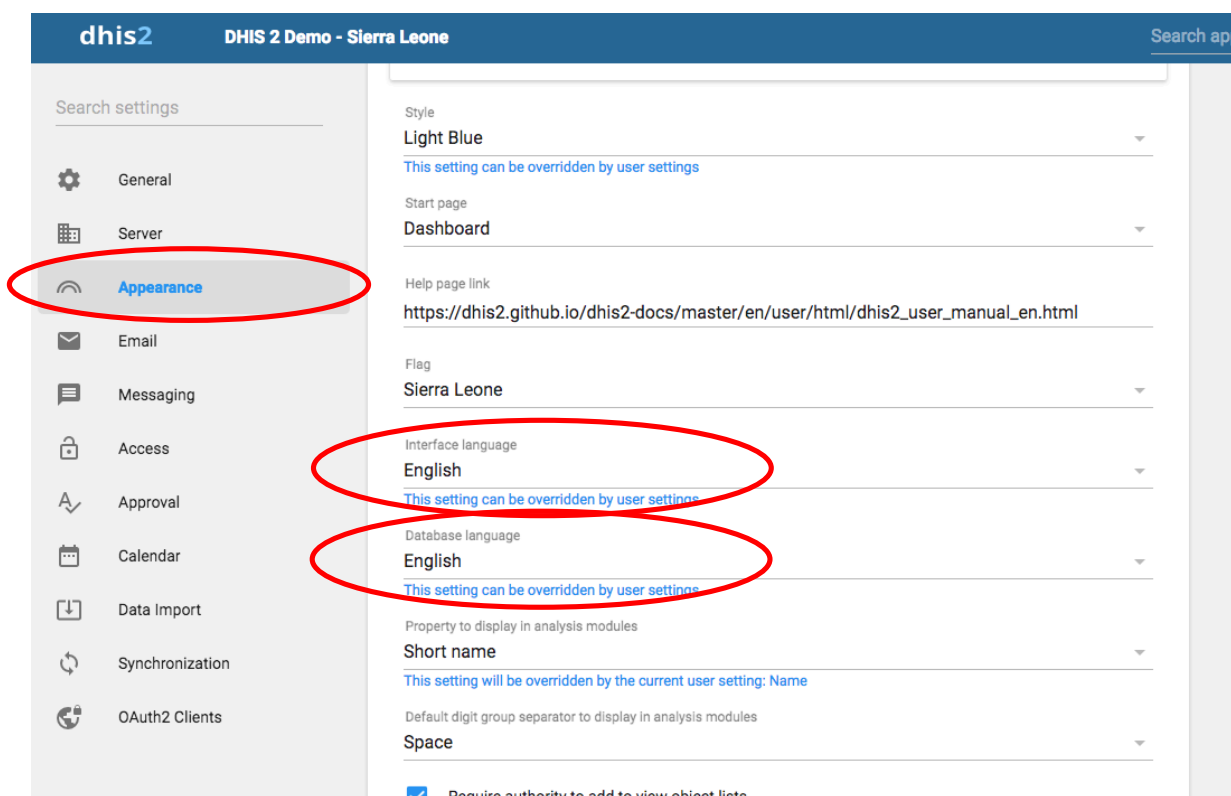
The instructions below show how to configure each of these options.

6. Setting the default system language

To begin, open the DHIS2 'System Settings' app:



Once you are on the Systems Setting page, click on the 'Appearance' tab, and then change 'Interface language' and 'Database language' to your chosen language:



There is no need to click 'Save' (these changes are saved automatically). Users may need to log out and in again for these changes to fully take effect.

7. Setting an individual user's language

This needs to be done by the user themselves. They can access their settings page by clicking on their account in the top right-hand corner of the screen, and selecting 'Settings':

The screenshot shows the DHIS2 interface for a user named John Traore. In the top right corner, a user menu is visible with the user's initials 'JT'. The 'Settings' option, represented by a wrench and screwdriver icon, is circled in red. Other options in the menu include Profile, Account, Help, and About DHIS 2. The main content area displays various data visualizations, including a map of Sierra Leone and a line chart showing data over time.

In the settings screen, change both the Interface Language and the Database Language to your chosen language:

The screenshot shows the 'User settings' page in DHIS2. The 'Interface language' is set to 'Indonesian (Indonesia)' with a system default of 'French'. The 'Database language' is also set to 'Indonesian' with a system default of 'French'. Other settings include 'Style' (Use system default), 'Property to display in analysis modules' (Name), 'Enable message email notifications' (Yes), and 'Enable message SMS notifications' (No). The 'User settings' page is accessible via a sidebar menu with options for 'User settings', 'User profile', and 'Account settings'.

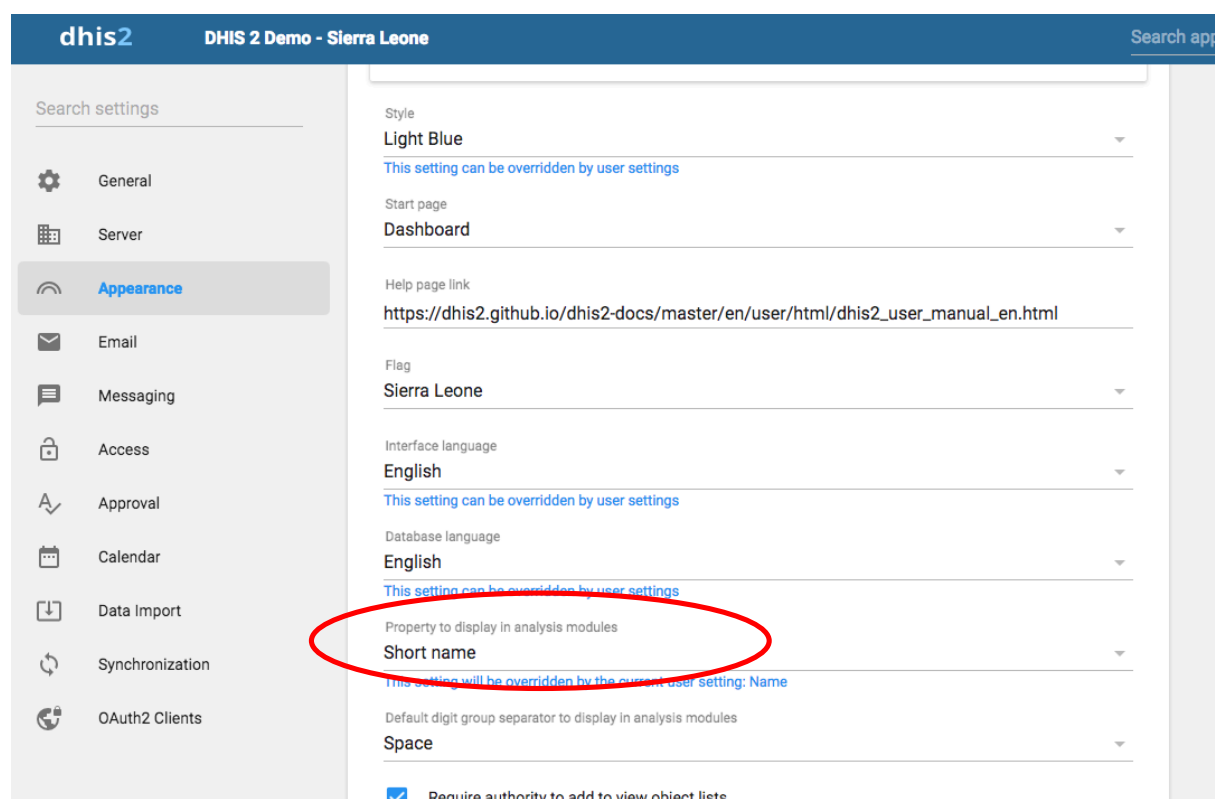
There is no need to click 'Save' (these changes are saved automatically). However, the User may need to log out and in again for these changes to fully take effect.

8. Changing the name that is used in reports/analytics

DHIS2 provides two options for how data elements, indicators and other elements are displayed in the analytics:

- **Name:** this is the full name, which for the EquityTool includes a prefix with the item code;
- **Short name:** this is a shorter name (maximum 50 characters), which for the EquityTool excludes item codes, and condenses some questions to fit 50 characters.

In order to make reports/analytics as user-friendly as possible, we recommend using 'Short name' for this setting. You can set this option via the same screen used to set language options (System settings | Appearance):



There is no need to click 'Save' (these changes are saved automatically). Users may need to log out and in again for this change to fully take effect.

Updating and maintaining your DHIS2 EquityTool Programs

When you download an EquityTool survey, you will be prompted to supply your name and a contact email address. This email address will be used to notify you of any corrections or updates to EquityTool country surveys.

Updates to existing country surveys

If a correction or update needs to be made to an existing EquityTool country survey (for example, the addition of a new translation), a replacement XML file will be released, and you will be notified via email.

This file will have ***the same name, but a different version number*** (eg 'EQT-KE14 Kenya (DHS 2014) v1.1'). This file will ***update your existing program*** with any necessary changes. To install the update, simply log in as an 'Admin' and follow the instructions above on 'Loading the EquityTool XML'.

Release of new country surveys

If a new DHS survey is undertaken in a country, and a new EquityTool is released, a new XML file will also be released.

This file will have a ***different name to the original file***, and will start at version '1.0' (eg 'EQT-KE18 Kenya (DHS 2018) v1.0'). This file will ***create a new EquityTool survey/program*** in your DHIS2 instance, alongside the older one; you can continue to use the old program for analysis purposes, but we recommend that you remove all users from that older program's User Role, so that no data is accidentally collected using the old version of the survey. To install this new survey, simply log in as an 'Admin' and follow the instructions above on 'Loading the EquityTool XML'.