USER GUIDE FOR
PREVENT TB SMART SETUP

Version 2.0

Created by: Dure Technologies
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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://ltbigen.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

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

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

Step 3: Login or Sign In

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.*
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.
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

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

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

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.