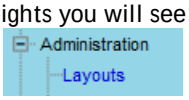
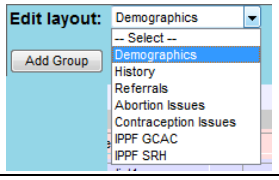
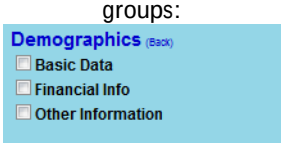
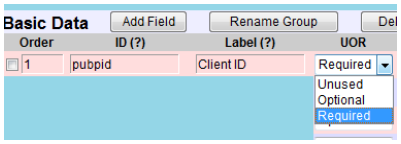
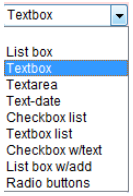
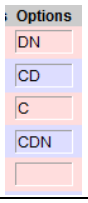
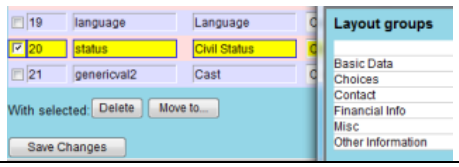
SUMMARY GUIDE OF SYSTEM ADMINISTRATION – INSTALLATION FUNCTIONS – VERSION 4.0 (June 2010)

POSSIBLE ROLES: IT MGR / CMIS STEERING COMMITTEE SUPERVISION	PROCESS 6.5.0 Layout Basics

#	Step	Observations	Menu options or screen information
0	**Warning**: Changes in layouts may affect historical data and produce information loss. Layout design should be carefully planned and changes accompanied with an update strategy for all clinics using the system	Layouts allow the creation and update of data entry forms, with specification of mandatory or optional fields, data type, default values and other key attributes.	If you have administrator user rights you will see: 
1	System **data entry forms** that can be edited with the Edit Layout function are: •Demographics •Clinic History •Referrals • Medical Issues • Special templates or 'layout based forms' (GCAC / SRH, etc)	These layouts are included by default in the installation process. They can be edited to respond to an Association needs. However, some fields are standard and mandatory and should not be changed (sex, date of birth, education & religion)	
2	Layouts are comprised of fields organized in **Groups.** Eg. The Demographic layout includes the following predefined groups, which can be renamed and modified: Basic data, Financial info, other information; in addition there are user-defined fields	 Groups can be added, renamed, relocated (Up and Down) and deleted. In addition, fields can be added to a group and their attributes defined.	Example of demographic groups: 
3	**Fields** in within each group can be specified in terms of their attributes: •Order •ID •Label •UOR (*) •Data type (*) • Size • List (predefined values) • Label columns • Data columns • Options (*) • Default value • Description	 File attributes are explained in more detail in an example on how to adapt an existing layout. Fields with special options (*) are commented below	
4	(*) **UOR status**: Unused (not shown in layout), Optional, or Required status for data entry. Saving the layout data will only be allowed after all required fields are completed		UOR status is defined by selecting the appropriate option in the column Drop-down menu
5	(*) **Data Type**: among the most common types available are: • List box: single-choice drop-down menu • Listbox w/add: single-choice drop-down menu that can be expanded at data entry • Checkbox list: multiple choice tick boxes • Checkbox w/text: Checkbox w/text added	• Textbox: short field for free text • Textarea: larger area for free text • Text-date: date format with calendar • Text box list: Labelled text boxes • Radio buttons: single choice buttons • Exam Results: Radio button w/ text	
6	(*) **Options**: One or more additional field characteristics: C – Capitalize field contents D – Dup Check: Helps prevent client duplication, by comparing new record field with existing records	N – New Client Form: fields are part of the new client record page and are shown in search screen O – Order Processor: For Lab/Order check V - Vendor: Used when field content represents a service provider to distinguish them from other types of entries in Address Book	Sample option characteristics: 
7	**Changing a field to a different group** •Mark the check box of field(s) to be moved •Select the destination layout group •Save changes		Note: groups and fields can be moved without affecting the integrity of data previously saved. Deleting fields can affect data integrity.