

# DATIM 4U Site Workflow

DRAFT

## High-level scenario

4U Nodes supported in OUs (Operating Units) manage their own site list. The 4U site list will contain all sites that the node needs to use in PEPFAR reporting. In addition, the 4U site list may contain sites that are used for other business or reporting needs. PEPFAR subscribes to the OU node's list and provides a **unique PEPFAR ID that allows a 4U instance to map this metadata element to a site record**. That allows a 4U instance to communicate a PEPFAR ID back to PEPFAR at the time of reporting.

When new Site data is entered into a 4U site list, the system will do a search to determine if that site already exists in the 4U site list. **If the site does not exist, the 4U user can decide to add the site.**

PEPFAR will subscribe to the site list of specific 4U nodes. When PEPFAR receives a new site from a 4U instance, they will:

1. Determine if the site is a PEPFAR reporting site
  - a. No - Stop
  - b. Yes - Determine if the site is already in the PEPFAR site list
    - i. No - Add site and PEPFAR site id
    - ii. Yes - ???

**What does PEPFAR do when there is an update to a site?**

Note: For 4U instances that are not ready to physically support site management, the sites can continue to be managed by OU personnel in the PEPFAR repository.

## System Actors

DATIM4U

- DHIS2
- Infoman
  - DATIM-Global Document - Contains site data from global with Global IDs
  - 4U-<Site Name or OU Name> Document (For example 4U-Tanzania) - contains site data from Node
- IL

DATIM Global

- DHIS2
- Infoman
  - DATIM-Global Document
  - 4U-<Site Name or OU Name> Document (For example 4U-Tanzania)
  - 4U-Merged Document a merge of all of the 4U-<OU Name> Documents
- IL

**Question- Are these the right steps?**

### STEP 1 - Initialize Node with Site data?

Questions:

1) **How does the 4U site list for an OU get initially populated?** By end users within the OU. **Does the initial data come from Global?** Not sure it matters. Because Global received their data from the OU in the first place. **If the initial load comes from PEPFAR we already have code to do that.** Sounds good.

If we are doing a bulk load from PEPFAR site data,

- When importing don't import the UUID, OrgunitID node will generate their own and preserve UID of the original
- CSD has the data with the global UUID etc...
- UID in the node will be different from PEPFAR

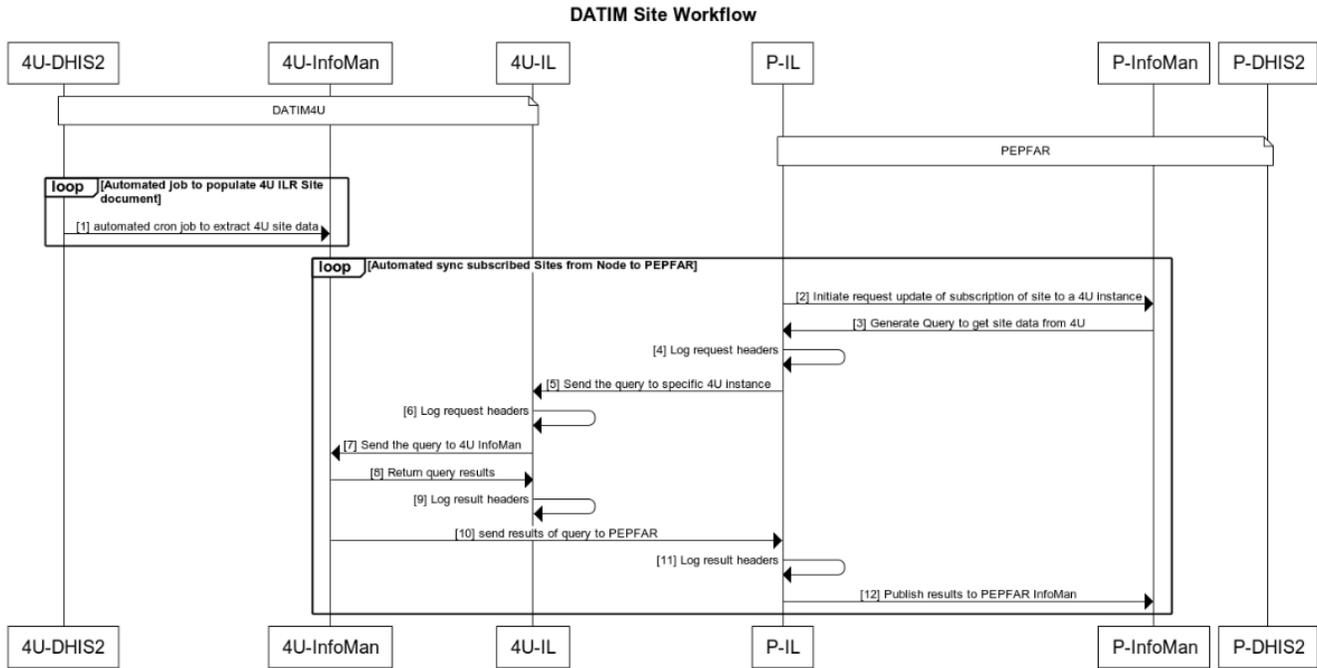
### STEP 2 - Sites are managed at 4U node using DHIS2 functionality and a DHIS2 App.

New site adding process: Screen mockups <https://docs.google.com/document/d/1WuEOsYJhLw-dqk1FnadOFwqyIsPif90Y13huqy08dvQ/edit#heading=h.wy9rbj8467ht>

Other DATIM Site management functions are the same as current DATIM process. This documentation will need to be updated for 4U: [uml-sequence.png](#)

### STEP 3 - PEPFAR to subscribes to 4U site data

A process has been developed for PEPFAR to subscribe to 4U site data. This process happens in an automated way. An administrator does a one time configuration to set up the exchange.



### STEP 4 - Prepare PEPFAR ILR data for import into PEPFAR DHIS2

4U-<OU1> Site data from 1 of N 4U nodes managing their own sites

4U-<OU2> Site data from 1 of N 4U nodes managing their own sites

How is the data merged? Need screen shots and directions.

### STEP 5 - Import subscribed data into PEPFAR DHIS2

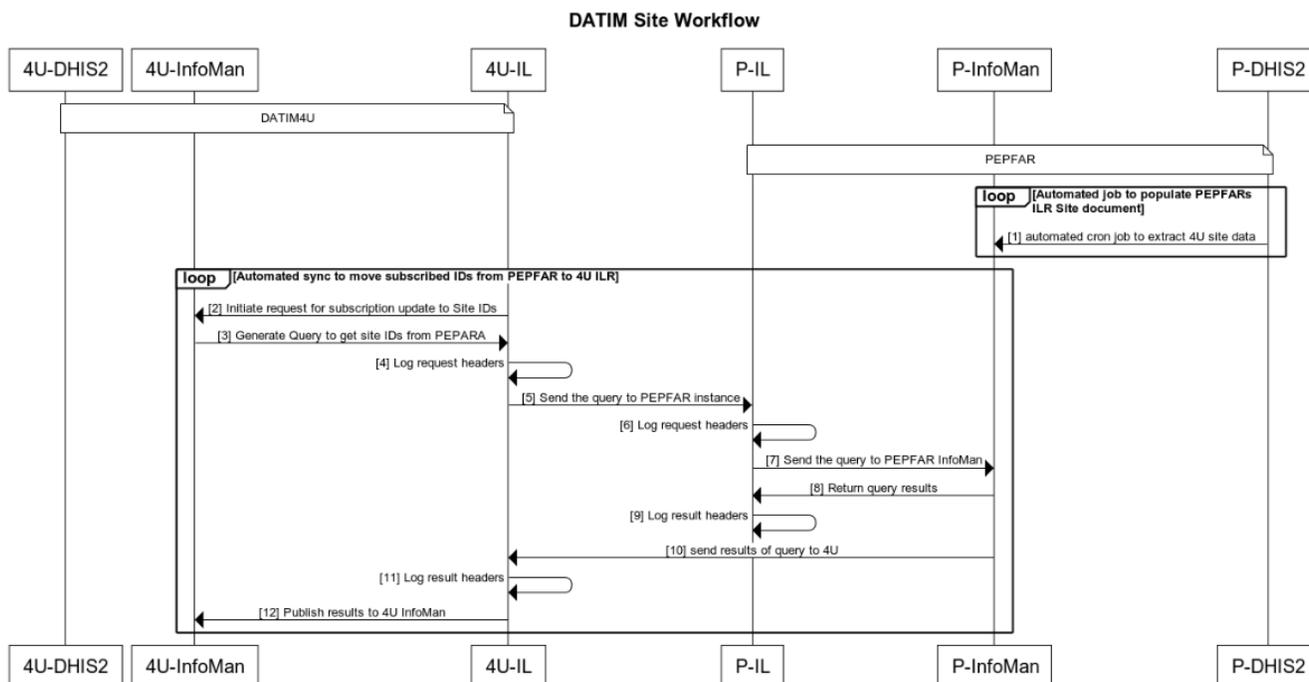
Modify the new app being developed by Jembi to

1. Find sites in DATIM-Merged that have been added or updated since last import

2. For each site, run matching algorithm to make sure that the site doesn't already exist.
3. If site is a PEPFAR reporting site, add it and add the PEPFAR ID???

## Step 6 - 4U site subscribes to Site IDs added at DATIM Global

This is an automated process that is configured once by an administrator or by the 4U install and then runs automatically.



## Step 7 - Import the PEPFAR IDs into 4U DHIS2

We may or may not need to do this step. It depends upon the strategy we use to import the desired mechanism data. If we only need the site name to import mechanism data, then we do not need this step. Jim will need to help us understand the options for keeping mechanism data aligned.

We also need to be careful that importing the ids is not a change that will kick off the update cycle with global again. We want to make sure we don't get into an endless loop of transmitting the same records.

## Step 8 - Translate the ADX message 4U IDs to PEPFAR IDs

An OpenHim mediator has been designed to read any outgoing ADX message on the node and check to make sure that any 4U site IDs in the message are translated to PEPFAR site IDs.

Workflow - [Export Aggregate Data](#)