Informatics for Integrating Biology and the Bedside



# User Guide Project Request

Document Version:1.6.112b2 Software Release:1.6

## **Table of Contents**

Document Management	3
About this Guide	4
1. Prerequisites	5
1.1         i2b2 Software           1.1.1         i2b2 Server Code 1.5	5
2. Install and Configure	6
2.1       Setting up Approvals in the WebClient         2.1.1       Adding approvals         2.1.2       Assigning users to approvals	6 6 7
3. Submitting project requests	9
3.1 Entering Project Requests in the WebClient	9
3.2       Viewing Project Requests         3.2.1       Login to WebClient	<b>10</b> 10
3.2.2 Adding approvals	10
License	12

# **DOCUMENT MANAGEMENT**

Revision Number	Date	Author	Description of change
1.6.1	07/22/10 Janice Donahoe		Created 1.6 version of document.

# **ABOUT THIS GUIDE**

Informatics for Integrating Biology and the Bedside (i2b2) is one of the sponsored initiatives of the NIH Roadmap National Centers for Biomedical Computing (<u>http://www.bisti.nih.gov/ncbc/</u>).

One of the goals of i2b2 is to provide clinical investigators broadly with the software tools necessary to collect and manage project-related clinical research data in the genomics age as a cohesive entity; a software suite to construct and manage the modern clinical research chart.

## **1. PREREQUISITES**

# 1.1 i2b2 Software

#### 1.1.1 i2b2 Server Code 1.5

The latest version of the i2b2 Server Code 1.5 needs to be Installed.

# 2. INSTALL AND CONFIGURE

## 2.1 Setting up Approvals in the WebClient

Launch the webclient and going to the address configured in section 1.1.1. You will be presented with a login screen. Login with an Administrator account.

i2b2 Query & Analysis Tool
12b2 Query & Analysis 1001         Izb2 Login         Username:         Izb2         Izb2         Host:         SHRINE         Login

#### 2.1.1 Adding approvals

Once logged in, select the 'Admin' from the upper right side. Then select 'Manage Approvals'. You should see:

PM Navigation       Manage Approvals            • Manage Hive • Manage Projects • Manage Veers • Manage Approvals • Project Requests           • Manage Approvals • No records found. • Save Updates Delete Add New	i	<b>2b2</b> Query & Analysi	s Toc	bl		Find Patients   Ad	lmin   Analysis Tools	Message Log   Help   Log	out
		2b2 Query & Analysi	s Toc Manau id No re Save	ge Approv name cords foun Updates	description d. Delete Add I	Find Patients   Ad activation_date	imin   Analysis Tools	Message Log   Help   Log	out

Select 'Add New' to create a new Approval Enter the following:

- 1. ID A unique ID for this Approval
- 2. Name This will be displayed in the dropdown list
- 3. Description A Detailed description of the approval (Optional)
- 4. Activation Date This is the date that approval will be available (Optional)
- 5. Expiration Date This is the date the approval will expire (Optional)

Then select 'Save Update' to save the approval to the database. Selecting the approal, and clicking on 'Delete' will remove the approval.

The following is after a approval was saved.

i2b2 Query & Analysis Tool				Find Patients   Admin   Ana	lysis Tools   Messag	ge Log   Help   Logo	ut
PM Na Ma Ma Ma Pro	vigation nage Hive nage Projects nage Users nage Approvals oject Requests	Manage A id Asthma Save Upd	Asthma Project Iates Delete	description Determine if patients has Asthma Add New	activation_date	expiration_date	

#### 2.1.2 Assigning users to approvals

Select 'Manage Users' from the left navigation. Once logged in, select the 'Admin' from the upper right side. Then select 'Manage Approvals'. You should see:

i2b2 Query & i2b2 Web Cl	ient 00l	Find Patients   Admin	Analysis	Tools   Mess	age Log   Help   Logout
PM Navigation	Manage Users				ā
Hive Manage Hive	full_name	user_name	email	password	
Manage Projects	i2b2 Admin	i2b2		******	
Manage Approvals	i2b2 User	demo		•••••	
Project Requests	OBFSC_SERVICE_ACCOUNT	OBFSC_SERVICE_ACCOUNT		******	
	Save Updates Delete Add N	lew			

Select the user you wish to add a approval for

Click on Add New',

Enter the following;

- 1. Name Always Enter 'APPROVAL\_ID'
- 2. Datatype Always Enter 'T' Text
- 3. Value Enter the Approval ID from 2.1.1

i2b2 Query & Analysi	is Tool	Find Patients   Admin	Analysis	Tools   Mess	age Log   Help   Logout
PM Navigation	Manage Users				8
Hive Manage Hive	full_name	user_name	email	password	
Manage Projects	i2b2 Admin	i2b2		******	
Manage Approvals	i2b2 User	demo		•••••	
Project Requests	OBFSC_SERVICE_ACCOUNT	OBFSC_SERVICE_ACCOUNT		*******	
	Save Updates Delete Add N           name         datatype           APPROVAL_ID         T           Save Updates         Delete         Add N	vew Asthma New			

# 3. SUBMITTING PROJECT REQUESTS

### 3.1 Entering Project Requests in the WebClient

Launch the webclient and going to the address configured in section 1.1.1. You will be presented with a login screen. Login with an user account that you associated a approval with in 2.1.1.

Select **Analysis Tools** from the top left and than **Project Request** in the plugin section.

i2b2 Query & Analysis Tool	Find Patients   Admin   Analysis Tools   Message Log   Help   Logout
Navigate Terms Find Terms 🕢 💟 📃	Project Request
	Specify Data View Results Plugin Help
e <u>C</u> i2b2 e <u>C</u> Custom Metadata e <u>C</u> Asthma <u>C</u> Providers	Drop a Patient Set and a Concept (Ontology Term) into the input boxes below, enter in the approval message and select the users and then click the "Submit Request" tab to submit the request and get a confirmation number.
	Enter Title:
	Select a Approval
Workplace	
Previous Queries	Plugins
My Demographics [2-18-2010] [jmd86]     Demographics@03:51:07 [2-18-2010]	Detailed List View  Category: ALL
Being aphics@003:49:26 [2-18-2010]	Example #5 - Communicator Tool This plugin allows you to interact directly with standard Cell Communicator objects within the
Comparison Content of Conten	Project Request This plugin is uesed to generate a request for a new project based on concepts, patients and

Enter the following:

- 1. Title The title associated with this project request
- 2. Approval In the select box, select the approval
- 3. Users Select the users for this with the appreciate data and admin roles
- 4. Identify Cases Include these patients to be used in the case
- 5. Exclude Cases Exclude these patients from the case (Optional)
- 6. Identify Controls Use this patients in the identify controls (Optional)

- 7. Exclude Controls Exclude these patients in the identify controls (Optional)
- 8. Concepts Use these concepts
- 9. Exclude Concepts Exclude these concepts (Optional)

Click on Submit Query to submit the request, you will be presented with a ID for this request.

## 3.2 Viewing Project Requests

#### 3.2.1 Login to WebClient

Launch the webclient and going to the address configured in section 1.1.1. You will be presented with a login screen. Login with an Administrator account.

i2b2 Query & Analysis Tool
Izb2 Login         Username:         Izb2          Password:         Izb2 Host:         SHRINE         Login

#### 3.2.2 Adding approvals

Once logged in, select the 'Admin' from the upper right side. Then select 'Project Request. You should see:

i	<b>2b2</b> Query & Analysi	is Toc	bl	ents   Admin   Analysis Tools   M	essage Log   Help	p   Logout	
	PM Navigation	Projec	ct Requests				ð
	Manage Hive	id	project_id	title	entry_date	submit_char	
	Manage Projects	21	RA_ProdTest		2010-03-31T00:00:00.000-04:00	jmd86	
	Manage Approvals	81	Asthma	JD Test Project Request 1	2010-04-14T00:00:00.000-04:00	jmd86	
	Project Requests	41	ra_mart_test	miketest	2010-04-12T00:00:00.000-04:00	jmd86	
		42	ra_mart_test	JD Test Project Approval 2	2010-04-12T00:00:00.000-04:00	jmd86	
		44	ra_mart_test	JD Test Approval 3	2010-04-12T00:00:00.000-04:00	jmd86	

Select one of the projects to see the details as in.

ð

# LICENSE

The i2b2 source code is licensed under the i2b2 Software License 2.1. This includes but is not limited to all code in the edu.harvard.i2b2.\* package namespace.