



User Guide

# Project Request

*Document Version:* 1.5.1  
*I2b2 Software Release:* 1.5

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## ABOUT THIS GUIDE

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

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**

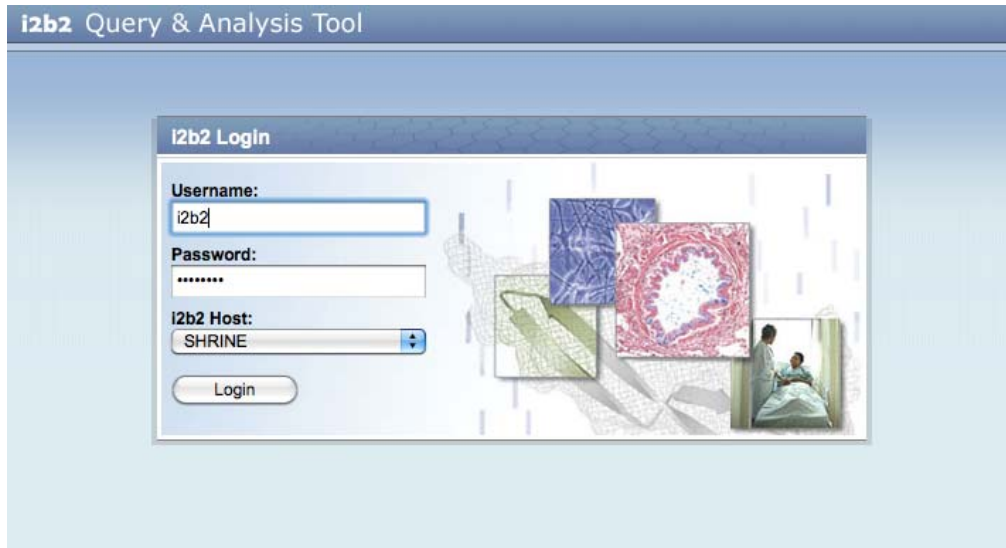
#### **1.1.1 i2b2 Server Code 1.5**

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

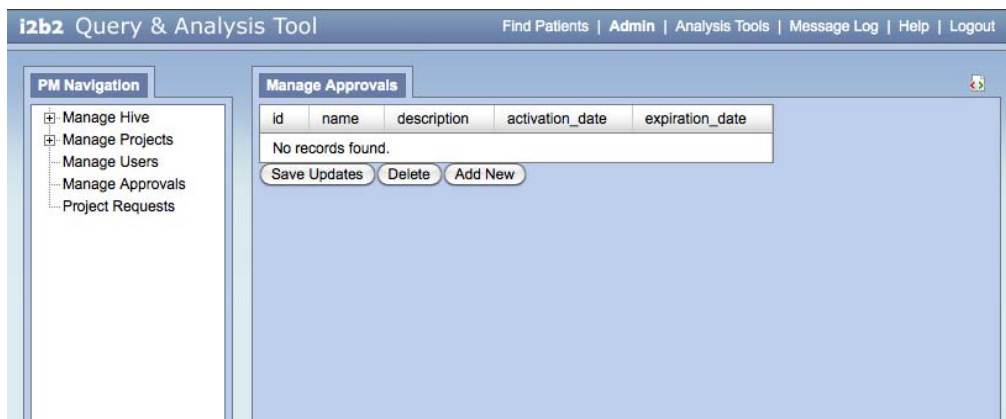
Launch the webclient and going to the address configured in section 1.1.1. You will be presented with a login screen. Login with an Administrator account.



The screenshot shows the 'i2b2 Query & Analysis Tool' login interface. It features a central 'i2b2 Login' box with the following fields: 'Username:' with the text 'i2b2', 'Password:' with masked characters '\*\*\*\*\*', and 'i2b2 Host:' with a dropdown menu showing 'SHRINE'. A 'Login' button is positioned below these fields. To the right of the login box is a decorative graphic with a map of the United States and several overlapping square tiles in various colors (blue, red, green, white) with abstract patterns. The background of the entire page is a light blue gradient.

#### 2.1.1 Adding approvals

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



The screenshot displays the 'i2b2 Query & Analysis Tool' interface after logging in. The top navigation bar includes 'Find Patients | Admin | Analysis Tools | Message Log | Help | Logout'. On the left, a 'PM Navigation' sidebar lists: 'Manage Hive', 'Manage Projects', 'Manage Users', 'Manage Approvals', and 'Project Requests'. The main content area is titled 'Manage Approvals' and contains a table with the following headers: 'id', 'name', 'description', 'activation\_date', and 'expiration\_date'. Below the table, a message states 'No records found.' and there are three buttons: 'Save Updates', 'Delete', and 'Add New'.

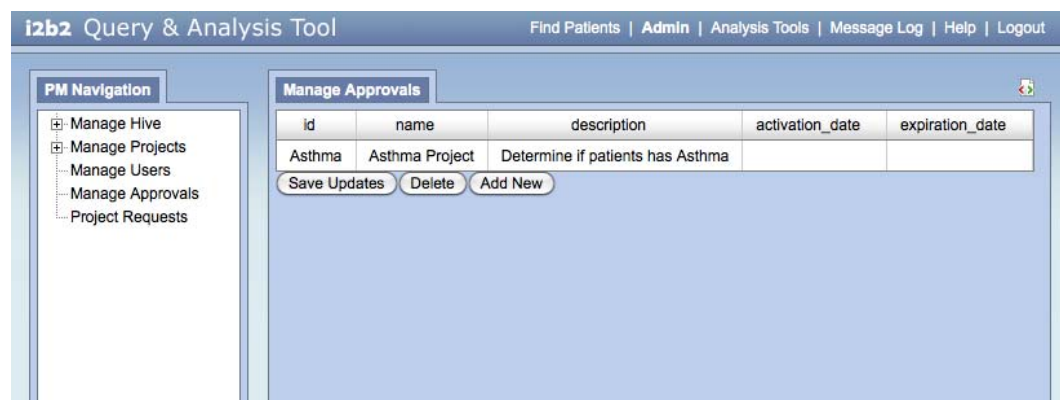
Select 'Add New' to create a new Approval

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*)

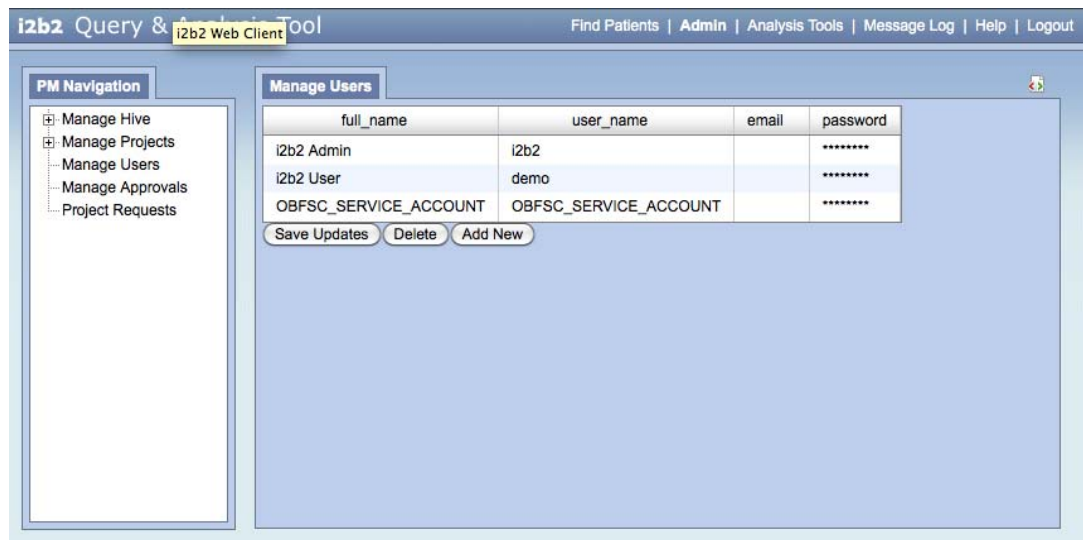
Then select 'Save Update' to save the approval to the database. Selecting the approval, and clicking on 'Delete' will remove the approval.

The following is after a approval was saved.



### 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:

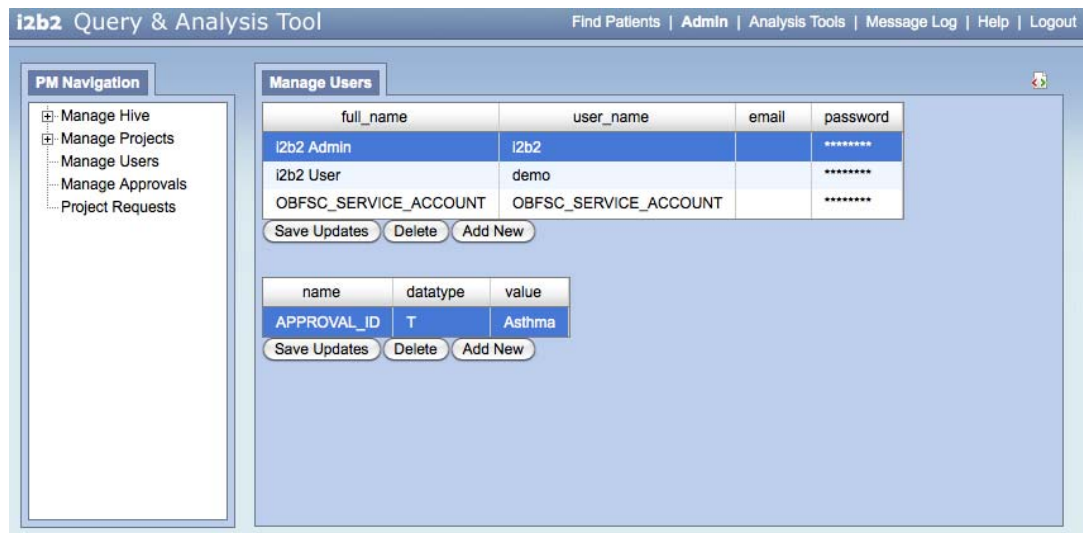


Select the user you wish to add a approval for

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

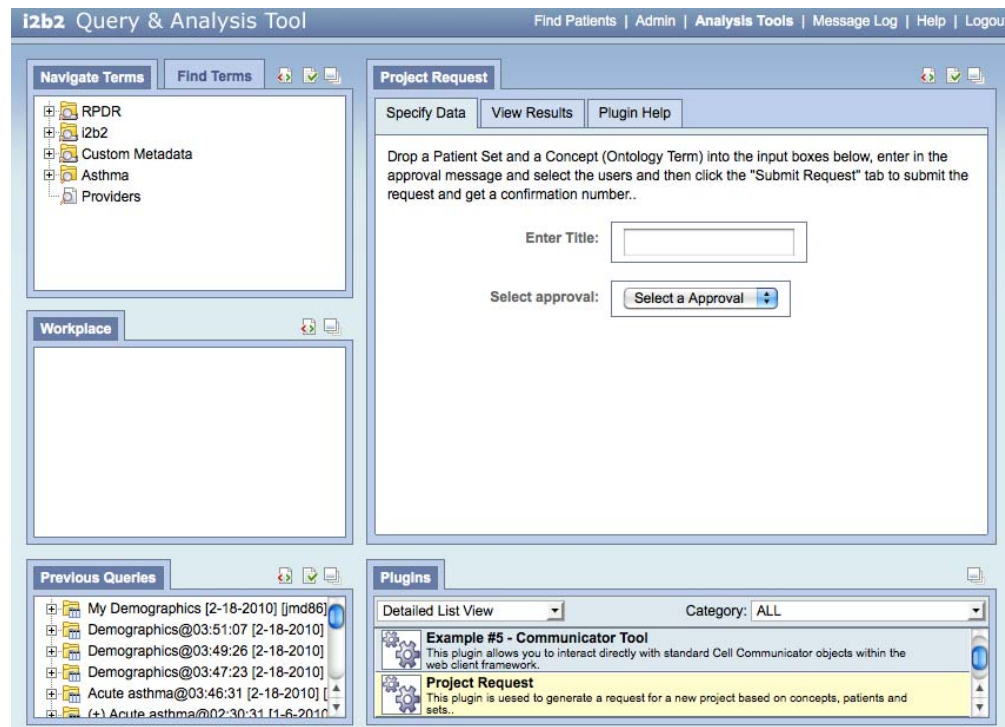


### 3. SUBMITTING PROJECT REQUESTS

#### 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.



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*)



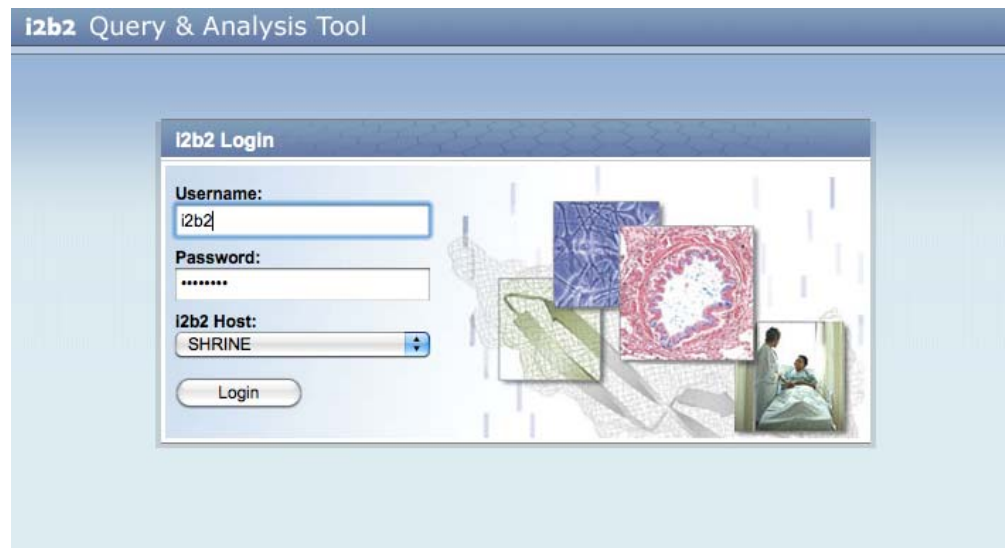
7. Exclude Controls – Exclude these patients in the identify controls (*Optional*)
8. Concepts – Use these concepts
9. Exclude Concepts – Exclude these concepts (*Optional*)

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.



### 3.2.2 Adding approvals

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

i2b2 Query & Analysis Tool

Find Patients | Admin | Analysis Tools | Message Log | Help | Logout

PM Navigation

- Manage Hive
- Manage Projects
- Manage Users
- Manage Approvals
- Project Requests

Project Requests

id	project_id	title	entry_date	submit_char
21	RA_ProdTest		2010-03-31T00:00:00.000-04:00	jmd86
81	Asthma	JD Test Project Request 1	2010-04-14T00:00:00.000-04:00	jmd86
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.

i2b2 Query & Analysis Tool					Find Patients   Admin   Analysis Tools   Message Log   Help   Logout																						
<b>PM Navigation</b> <ul style="list-style-type: none"> <li>Manage Hive</li> <li>Manage Projects</li> <li>Manage Users</li> <li>Manage Approvals</li> <li>Project Requests</li> </ul>		<b>i2b2 Web Client Project Request</b> <table> <tr> <td>Title:</td><td>miketest</td></tr> <tr> <td>Approval:</td><td>TEST1</td></tr> <tr> <td>Users:</td><td> <table> <tr> <th>User</th><th>Data Role</th><th>Admin Role</th></tr> <tr> <td>jmd86</td><td>DATA_LDS</td><td>MANAGER</td></tr> </table> </td></tr> <tr> <td>Included cases:</td><td>Patient Set - 8 Patients - 5320</td></tr> <tr> <td>Identify Concepts to be Included:</td><td>Demographics - \RPDR\Demographics\</td></tr> </table>			Title:	miketest	Approval:	TEST1	Users:	<table> <tr> <th>User</th><th>Data Role</th><th>Admin Role</th></tr> <tr> <td>jmd86</td><td>DATA_LDS</td><td>MANAGER</td></tr> </table>	User	Data Role	Admin Role	jmd86	DATA_LDS	MANAGER	Included cases:	Patient Set - 8 Patients - 5320	Identify Concepts to be Included:	Demographics - \RPDR\Demographics\	<table> <tr> <th>submit_char</th></tr> <tr><td>6</td></tr> <tr><td>6</td></tr> <tr><td>6</td></tr> <tr><td>6</td></tr> <tr><td>6</td></tr> </table>	submit_char	6	6	6	6	6
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## LICENSE

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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.