



User Guide

Project Request

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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 (<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

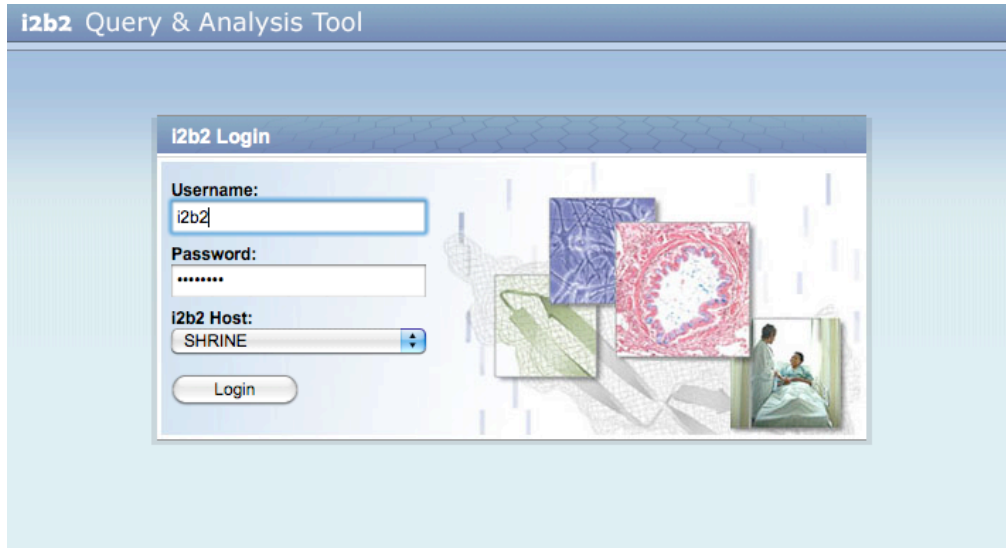
1.1.1 i2b2 Server Code 1.5

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

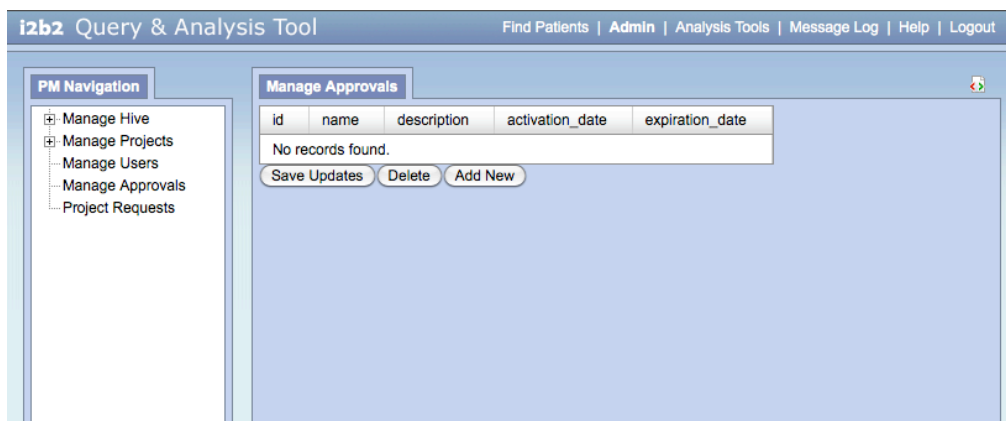
Launch the webclient and going to the address configured in section 1.1.1. You will be presented with a login screen. Login with an Administrator account.



The screenshot shows the 'i2b2 Query & Analysis Tool' login interface. It features a central 'i2b2 Login' box with the following fields: 'Username:' with the value 'i2b2', 'Password:' with masked characters '*****', and 'i2b2 Host:' with a dropdown menu showing 'SHRINE'. A 'Login' button is positioned below these fields. The background of the login box includes a map of the United States and several medical-related images, such as a DNA helix, a brain scan, and a person in a hospital bed.

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 links for 'Find Patients', 'Admin', 'Analysis Tools', 'Message Log', 'Help', and 'Logout'. On the left, a 'PM Navigation' sidebar lists options: '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'. The table body shows 'No records found.' Below the table are three buttons: 'Save Updates', 'Delete', and 'Add New'.

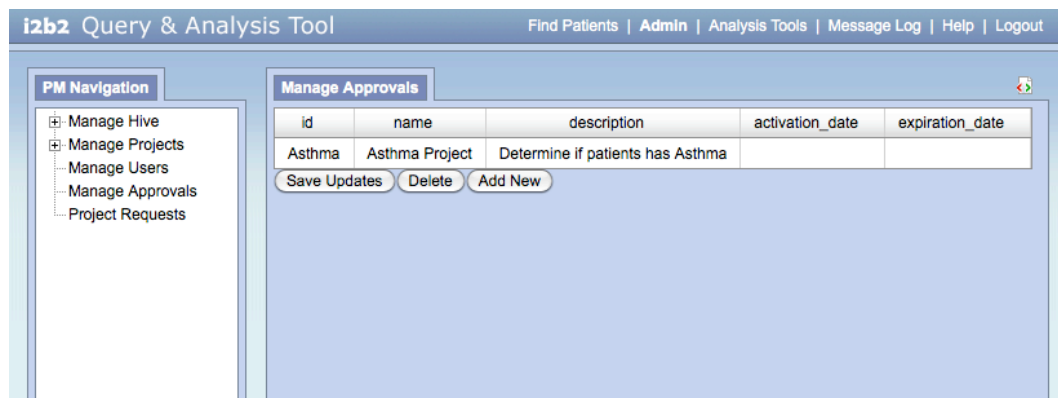
Select 'Add New' to create a new Approval

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*)

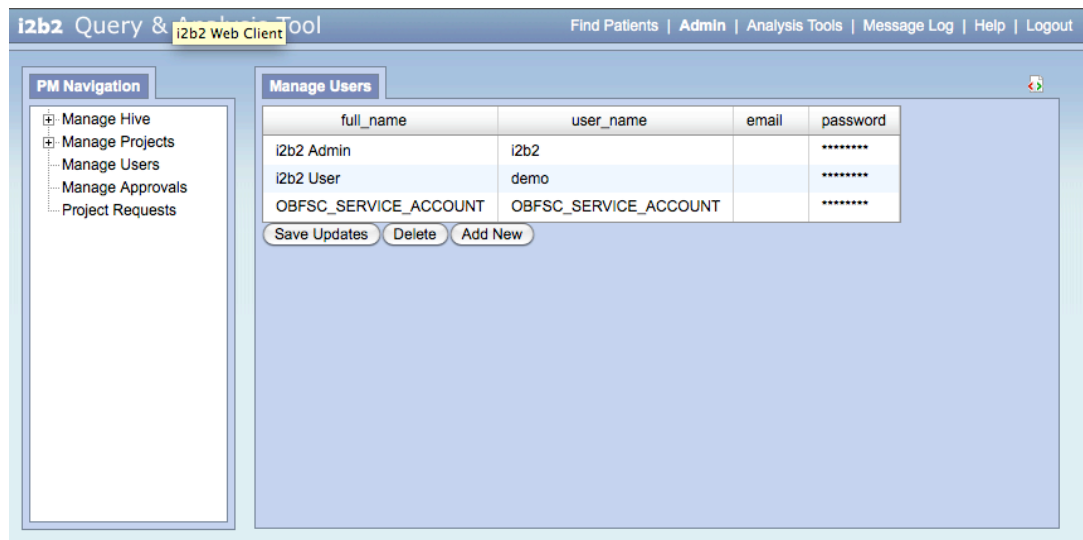
Then select 'Save Update' to save the approval to the database. Selecting the approval, and clicking on 'Delete' will remove the approval.

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:

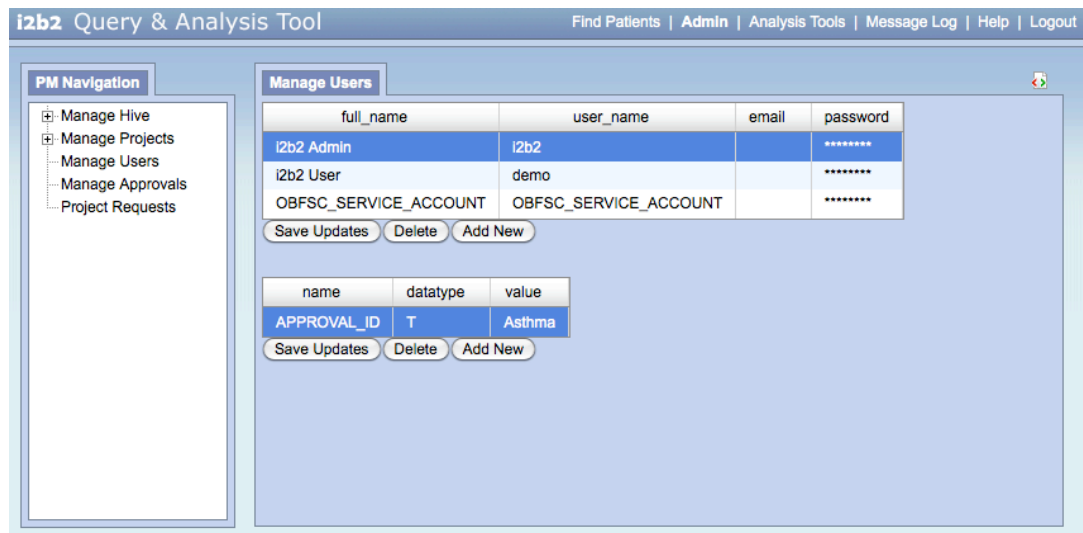


Select the user you wish to add a approval for

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

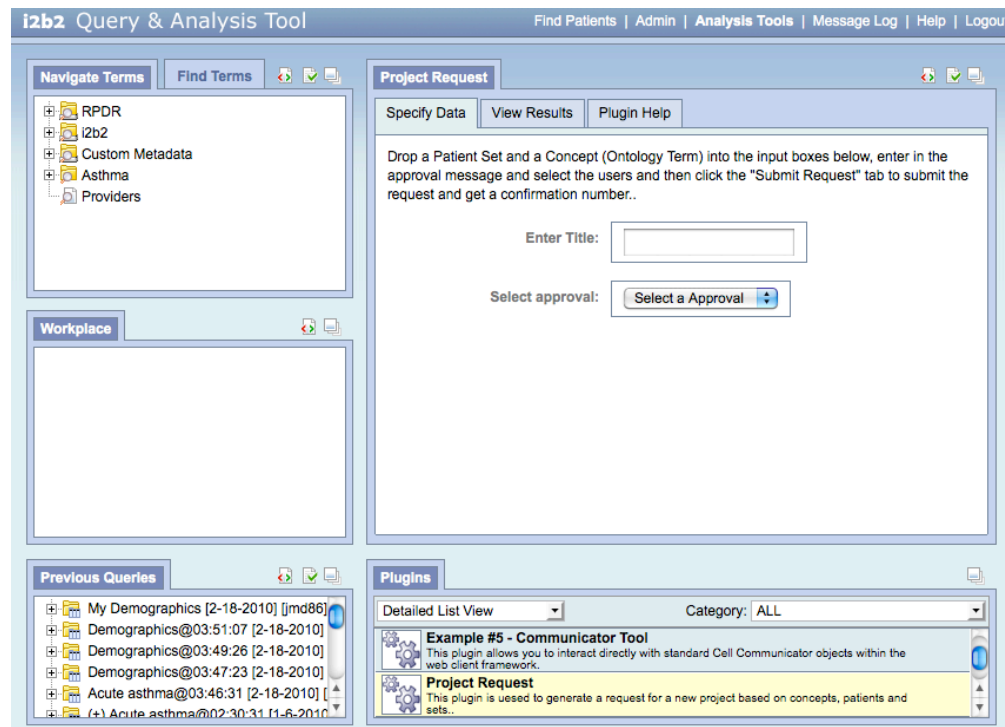


3. SUBMITTING PROJECT REQUESTS

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*)

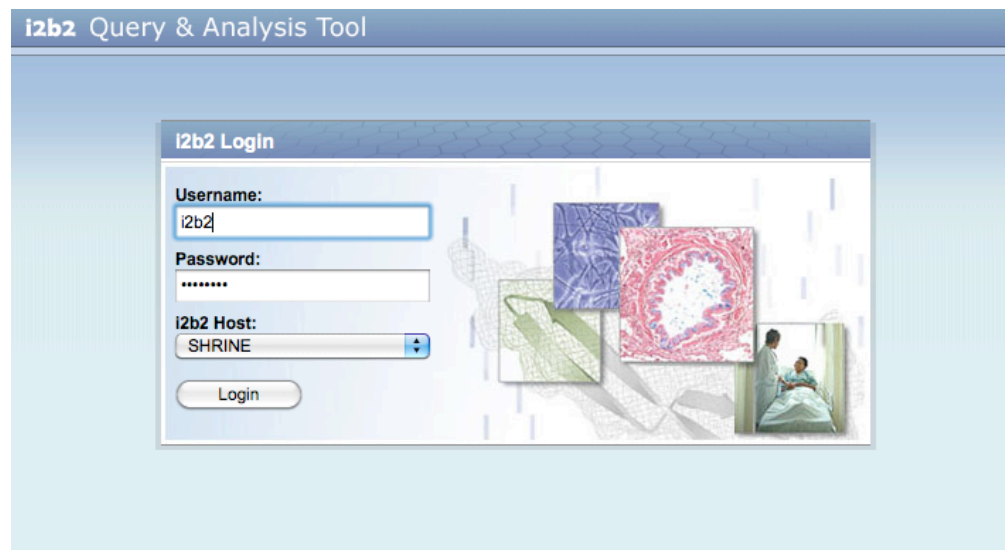
7. Exclude Controls – Exclude these patients in the identify controls (*Optional*)
8. Concepts – Use these concepts
9. Exclude Concepts – Exclude these concepts (*Optional*)

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						
PM Navigation					Project Requests											
<ul style="list-style-type: none"> Manage Hive Manage Projects Manage Users Manage Approvals Project Requests 					<div> <div>i2b2 Web Client Project Request</div> <div> <div>Title: miketest</div> <div>Approval: TEST1</div> <div>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> </div> <div>Included cases: Patient Set - 8 Patients - 5320</div> <div>Identify Concepts to be Included: Demographics - \RPDR\Demographics\</div> </div> </div>						User	Data Role	Admin Role	jmd86	DATA_LDS	MANAGER
User	Data Role	Admin Role														
jmd86	DATA_LDS	MANAGER														

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.