

ExportXLS v.3.4 Installation Guide

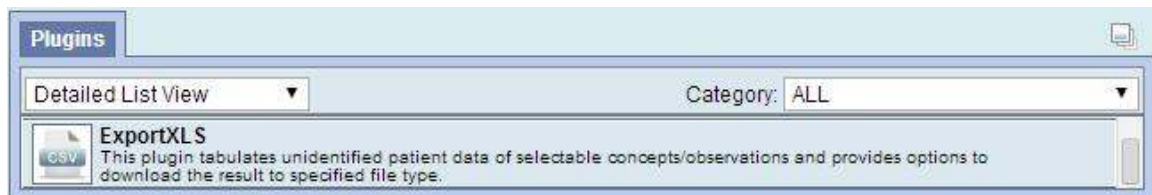
New Installation on i2b2 v.1.7.0.7 and Later Only

If you have never installed or used previous versions of ExportXLS, please read the ExportXLS v3.4 User Guide to get familiarized with this i2b2 Webclient plugin first, and then take advantage of the Webclient Plugin Installer that is included in this i2b2 release to install this plugin in the following straight forward manner:

1. Invoke the Webclient Plugin Installer from the i2b2 Admin Webclient (top right menu).
2. Specify the location of the `/webclient` folder on your i2b2 server.
(e.g. `/var/www/html/webclient`)
3. Click the **open ->** button to open and display the content of the plugin repository.
4. Find this plugin on the list and read through all relevant information pertaining to it carefully.
5. Click its **install** button to install it under the `/webclient/js-i2b2/cells/plugins/community` folder on your i2b2 server.
6. Note that starting with v1.7.0.7, all popular plugins developed by our community members (including this one) are to be placed under the `/webclient/js-i2b2/cells/plugins/community` folder (instead of `/webclient/js-i2b2/cells/plugins/standard`) — i.e. with the installation of the new i2b2 v1.7.0.7, it is not expected that any webclient (other than the standard ones) would have been installed; however, if you do have the previous version of this plugin installed under the `/standard` subfolder, you'll need to remove any previously installed version manually, in the following manner:
 - a. Remove the `/webclient/js-i2b2/cells/plugins/standard/ExportXLS` folder and its files.
 - b. Remove the old entry of this plugin from your `/webclient/js-i2b2/i2b2loader.js` file (on your server), as outlined (in red) here:

```
[...]  
,  
{ code: "ExportXLS",  
  forceLoading: true,  
  forceConfigMsg: { params: []},  
  forceDir: "cells/plugins/standard"  
},  
[...]
```

7. Review the preferences of your installation and carry out the steps outlined in the **“Fine-tuning Your Configuration”** section below (near end of this document).
8. You may need to restart your i2b2 webclient browser after clearing its cache to pick up these updates.
9. Please refer to the **“Fine-tuning Your Configuration”** section below to ensure proper settings are in place for your institution.
10. You should then see the link of this plugin getting displayed (near right hand bottom – you may need to scroll to find it) when you go to the “Analysis Tools”:



Installation on Older Versions of i2b2 (Prior to v.1.7.0.7)

This release of this plugin is specially tailored to v.1.7.0.7 of i2b2 only. It is highly recommended that you upgrade to this i2b2 version to pick up all the bug fixes and refinements in the webclient.

However, if for any reason you are not ready to upgrade, but yet are interested in installing this plugin (or upgrading it from v.1.0) on your older i2b2 now, you may do so by downloading the v.3.3 version of this plugin from <https://i2b2exportxlsv3p3.codeplex.com/> to install it.


Fine-tuning Your Configuration


Please note that in order to cover as many possible demographic data as possible for different institutions with different emphases in terms of safeguarding patient identifiable data; this version contains the following groups of data that represent a cross-section of useful vs. over-intimate (to some) information:

- 1) "Birth Year" vs. "Birth Date";
- 2) "Locality" vs. "State/City/ZIP"; "State"; "City"; and "ZIP".
 - For certain institutions, there is the concern that in certain small town or zipcode area that is sparsely populated, these data, along with Sex, Age, Income, Religion, etc., would allow certain individual be identified (despite of the de-identification efforts).
 - More details to follow.

Therefore, please go over the following lines (roughly lines 91 – 170) in your new /webclient/js-i2b2/cells/plugins/standard/ExportXLS/assets/injected_screens.html file to activate or block certain of these demographic data:

```
<span>
  <b><u>Include Patient Demographic Data</u></b>:
</span>
<!--span style="display:none;"-->
<span style="display:block;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_Sex" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_Sex', false);">
  Sex
</span>
<!--span style="display:none;"-->
<span style="display:block;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_Age" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_Age', false);">
  Age
</span>
<!--span style="display:block;"-->
<span style="display:none;">
  <input type="checkbox" id="ExportXLS-OutputIncludeDemo_BirthDate" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_BirthDate', false);">
  Birth Date
</span>
<!--span style="display:none;"-->
<span style="display:block;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_BirthYear" onChange=
    "i2b2.ExportXLS.SetFlag(this, 'includePatientDemoData_BirthYear', false);">
  Birth Year
</span>
```

 hidden (display:none)

 enabled (display:block)

Note that each of these demographic elements can be **hidden** (`display:none`) or **enabled** (`display:block`). If “Birth Date” is preferred over “Birth Year”, then simply change (comment / uncomment) to the appropriate *span style* tag of each:

e.g. to enable “Birth Date”, change from its

```
<span style="display:none;">
<!--span style="display:block;-->
```

to

```
<!--span style="display:none;-->
<span style="display:block;">
```

e.g. to hide “Birth Year”, change from its

```
<!--span style="display:none;-->
<span style="display:block;">
```

to

```
<span style="display:none;">
<!--span style="display:block;-->
```

...

Similarly, for “Locality” vs. “State/City/ZIP”; “State”; “City”; and “ZIP”:

```
<!--span style="display:block;--> ← hidden (display:none)
<span style="display:none;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_StateCityZIP" onChange=
    "i2b2.ExportXLS.SetFlag(this, 'includePatientDemoData_StateCityZIP', false);">
    State/City/ZIP
</span>

<!--span style="display:none;--> ← enabled (display:block)
<span style="display:block;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_Locality" onChange=
    "i2b2.ExportXLS.SetFlag(this, 'includePatientDemoData_Locality', false);">
    Locality
</span>

<!--span style="display:block;--> ← hidden (display:none)
<span style="display:none;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_State" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_State', false);">
    State
</span>

<!--span style="display:block;--> ← hidden (display:none)
<span style="display:none;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_City" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_City', false);">
    City
</span>

<!--span style="display:block;--> ← hidden (display:none)
<span style="display:none;">
  <input type="checkbox" enabled id="ExportXLS-OutputIncludeDemo_ZIP" onChange="i2b2.ExportXLS.SetFlag(this,
    'includePatientDemoData_ZIP', false);">
    ZIP
</span>
```

“Locality”, “State/City/ZIP”, “State”, “City”, and “ZIP” are all parsed from the “statecityzip_path” field of the “PATIENT_DIMENSION” table:

- If "Locality" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "SometownST" (i.e. the name of the town or city followed immediately with the double letter state code), then "Locality" will be displayed as is; else if the "statecityzip_path" data is of the form of "Zip codes\Statename\Townname\ZZZZZ", then "Locality" will be displayed as "Townname, Statename".
- If "State/City/ZIP" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\Statename\Townname\ZZZZZ", then "State/City/ZIP" will be displayed as "Statename/Townname/ZZZZZ".
- If "State" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\Statename\Townname\ZZZZZ", then "State" will be displayed as "Statename".
- If "City" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\Statename\Townname\ZZZZZ", then "City" will be displayed as "Townname".
- If "ZIP" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\Statename\Townname\ZZZZZ", then "ZIP" will be displayed as "ZZZZZ".

Note that if you choose not to do any fine-tuning of your configuration, you will get the following default selection of demographic data for your users to choose from:

