World Health Organization

GO.DATA USER GUIDE

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Chapter 1 – Welcome

Welcome to the Go.Data user manual.

This user manual provides instructions for installing, configuring, navigating, and using the Go.Data application.

The Go.Data user manual is intended to provide guidance for using the Go.Data application by providing high-level contextual information, field definitions, available actions, screenshots, and step-by-step instructions for completing tasks.

You can use the table of contents located at the beginning of this manual to quickly view instructions for a specific feature.

Your Go.Data user role defines the features you can access and actions you can perform within the application.

Additionally, Go.Data provides in-application contextual help for certain fields and features. You can customize the application's in-application help to best suit the needs of your organization.

Part I – Introduction to Go.Data

Chapter 2 – Getting started with Go.Data

Go.Data is a software application that supports data collection, including case investigation and contact tracing. Available in online, offline, and mobile settings, Go.Data provides users with the necessary tools to:

- view critical case, contact, and event records for an outbreak
- record data that is essential to tracking the outbreak
- create visualisations to aid in the tracking of an outbreak
- track follow-up activities for a specific outbreak
- identify relationships between individual outbreak records.

In addition, you can configure Go.Data to create specific user types and permissions for access to the system's data. Go.Data administrators can also create specific help topics and reference data to customize the software tool for a specific use or outbreak type.

You can further customize Go.Data for any language or geographical mapping.

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Application concepts

To use Go.Data tools effectively, you must first understand the concepts used within the software for the investigation and monitoring of an outbreak.

The following list defines the concepts critical to managing an outbreak using Go.Data.

- **Case**: A case is an individual who meets the epidemiological case definition for a particular disease outbreak. Standard case classifications can be defined within Go.Data.
- **Cluster**: A cluster is a grouping of cases, contacts, and events that have existing exposure or contact relationships for an outbreak. Generally, clusters are created when a potential relationship exists between records, but you are unsure of how the records are related.
- **Contact**: A contact is a person who is believed to be at risk through exposure to a case or event.
- **Data visualisation**. A data visualisation is a graph or chart that displays outbreak relationships and chains of transmission. After you have created cases, contacts, and events in Go.Data and the relationships between them with the direction and certainty level of transmission, the system can generate a relationship network as a chain of transmission graph.
- **Event**: An event is a specific community gathering where transmission of an outbreak disease is believed to have occurred. Examples of typical events include clinics, concerts, funerals, markets, mass gatherings, schools, and sporting events.
- **Follow-up**: A follow-up is an exercise performed by contact tracers to monitor the health of each contact following a potential exposure. The frequency and duration of a follow-up is determined by the suspected disease at the source of the outbreak.
- **Outbreak**: A disease outbreak is the occurrence of disease cases in excess of normal expectancy. Disease outbreaks are typically caused by an infection, transmitted through person-to-person contact, animal-to-person contact, or from the environment or other media. Outbreaks may also occur following exposure to chemicals or radioactive materials. Occasionally, the cause of an outbreak is unknown, even after a thorough investigation.[1]
- **Questionnaire form**: A questionnaire form allows you to ask a set of questions related to cases, contacts, and lab results. Go.Data contains a flexible questionnaire builder to author data input forms for cases, contacts, and lab results.

[1] "Disease Outbreaks," World Health Organization, August 24, 2012. https://www.who.int/environmental_health_emergencies/disease_outbreaks/en/.

Application terminology

Go.Data and this user guide employ specific terminology that is critical to understand and properly use the application. The following list defines the terminology that is critical to managing the outbreak using the Go.Data application.

- **Breadcrumbs**: A history of pages you have accessed prior to the current screen you are viewing. You can click the breadcrumbs to return to previous screens.
- **Button**: An object you click to initiate a specific action defined by the button's text.
- **Dashboard**: A landing screen that displays a summary of information related to the active outbreak.
- **Details**: A single location to view individual record data for a specific feature.
- **Drop-down menu**: A list where the values are derived from the reference data and that allows you to select from a variety of predefined options when entering or modifying data.
- **Feature**: An individual component of Go.Data used for viewing and recording data for an outbreak. You can access Go.Data's features by selecting the Menu button. Examples of features include cases, events, and contacts.
- **Filter**: You can use Go.Data filters to display and sort specific records based on the criteria you enter.
- **List icon**: An icon that displays when you hover over an individual record in a list. List icons are grouped on the left-hand and right-hand sides of a record. Examples of list icons include options (ellipses), modify, and view.
- **List**: A single location within Go.Data to view all records within a specific feature.
- **Message**: Text displayed by Go.Data confirming that an action has been recorded.
- **Reference data**: A list of data defined by a Go.Data system administrator that populates the selection options within drop-down menus.
- **Relationship**: Within Go.Data, you can make connections between specific records to determine how a disease has been transmitted. Examples of relationships include contact and exposure.
- **Team**: A group of Go.Data users to be assigned to a particular location. You can view the workload and assign follow-ups to specific teams in Go.Data.
- **Toggle**: An object you click to define if a statement is true or false.

Where does my data go and how does it relate to the outbreak?

The majority of Go.Data implementations are one of these installation scenarios:

- Stand-alone installations
- Server-based installations.

In extremely rare instances, Go.Data can also be implemented as a server-based linked installation, however, this scenario would only be likely after discussion with your Go.Data system administrator.

Stand-alone installations

In a stand-alone installation, you install Go.Data for PC, Windows, or Linux on a single computer. With this installation, your computer records all the data, which stays on your computer. If you wish to exchange data, you can do so by manually importing or exporting data files. This installation is best suited to small outbreaks or situations where there is limited internet connectivity.

Server-based installations

In a server-based installation, you install Go.Data for PC, Windows, or Linux on a single computer that acts as a server. You can then install Go.Data on any number of computers, phones, or tablets, which act as client applications.

With this installation, the client records all the data and syncs it back to the server, which makes the data available to other installations of Go.Data in the same system as long as the other users have the appropriate system permissions. You may also manually import or export data files. This installation is the most typical scenario.

Server-based linked installations

In extremely rare instances, you may need to consolidate data from multiple installations of Go.Data into a single point. While you install Go.Data on a single machine, it contains functionality to link multiple machines together, exchange data, and collaborate when multiple users are working on the same outbreak.

For more information about this complex scenario, visit https://www.who.int/godata and complete the Contact us form.

Chapter 3 – Installing Go.Data

Go.Data installs onto a Windows, Mac, or Linux machine, on either a personal workstation or a server. Go.Data also includes Android and iOS mobile applications, which have limited functionality and are focused on recording follow-up, case, and contact data in the field

You can install Go.Data from a source installation file for a workstation or by downloading a mobile smartphone or tablet application from an app store.

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What are the minimum requirements to install Go.Data?

The minimum requirements to install Go.Data on each of the following devices are as follows.

Windows:

- 64-bit
- CPU: 2GHz (Go.Data may be slow on processors with lower speeds)
- RAM: 8GB
- Storage: 3GB (more space will be needed to store larger amounts of data)
- OS: Microsoft Windows 7 or higher

Mac:

- CPU: 2GHz (Go.Data may be slow on processors with lower speeds)
- RAM: 8GB
- Storage: 3GB (more space will be needed to store larger amounts of data)
- OS: OS X 10.10 (Yosemite)

Linux:

- CPU: 2GHz (Go.Data may be slow on processors with lower speeds)
- RAM: 4GB
- Storage: 3GB (more space will be needed to store larger amounts of data)
- OS: Ubuntu 12.04, Fedora 21, or Debian 8

Android:

- CPU: quad-core CPU 2GHz or higher
- RAM: 2GB (Lowest end device tested is Samsung Galaxy S5: https://www.gsmarena.com/samsung_galaxy_s5-6033.php)
- Storage: 1GB
- OS: Android 5.0 or higher (preferably newer versions due to updated security patches)

iOS:

- Hardware: iPhone 5s or higher (preferably iPhone 6 or newer due to bigger screen size)
- Storage: 1GB
- OS: iOS 9.3 or higher (preferably iOS 10 or higher)

How do I receive Go.Data installation files?

How you receive your Go.Data installation files depends on the operating system and instance of Go.Data application you wish to use.

To get the installation files for Go.Data on Windows, Mac, or Linux workstations, either your Go.Data system administrator will send you the files or a link to the files, or you can visit https://www.who.int/godata and complete the Contact us form.

To get the installation files for Go.Data on iPhone or Android mobile device, use the App store appropriate for your device and download the Go.Data app.

Where do I find installation files?

After you receive the install files, how you locate them depends on the operating system and instance of Go.Data application you wish to install.

Locating installation files on workstations or servers

If you are installing Go.Data on a workstation or server, your Go.Data installation files will be provided to you by your system administrator or you will receive a link to download the files. To locate the local Go.Data installation files after you have received them, complete a search task on your local machine for **Go.Data Setup** for Windows or **Go.Data** for Mac.

Locating installation files on mobile devices

If you are installing Go.Data on a mobile device, you must locate the Go.Data installation files via your device's mobile application store. To locate the mobile Go.Data installation files, complete a search task in your mobile device's application store for **Go.Data**.

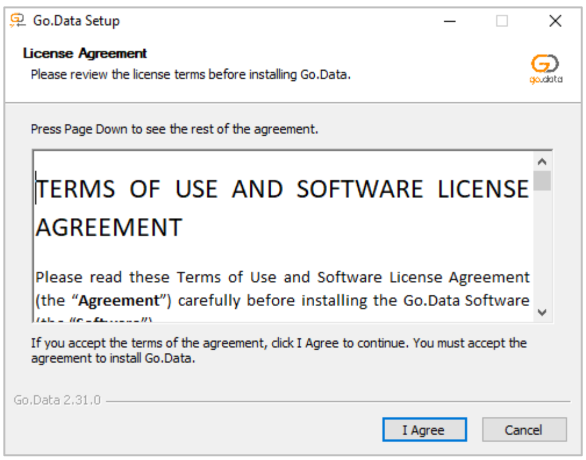
Installing Go.Data on personal workstations

The following sections provide general information about installing Go.Data on a personal desktop, laptop, server, or similar workstation. To begin the installation process, you need the Go.Data setup file for your operating system. You should have received this file from a Go.Data system administrator. Using this file, you can launch the Go.Data installation program.

The Go.Data installation program sets up all Go.Data files in order for you to run the application on your personal workstation.

It is recommended that you close all open applications before you begin the Go.Data installation process.

To install Go.Data on Windows



1. Locate the **Go.Data setup.exe** file on your personal workstation and open the file to launch the Go.Data installation program.

   The Go.Data installation program displays the Go.Data License Agreement.
2. Review the Go.Data license agreement and click the **I Agree** button.

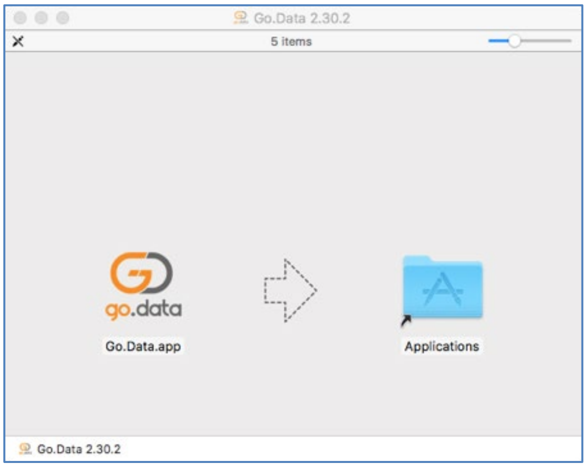
   The Go.Data installation program displays the Choose Installation Options screen.
3. Select one of the following:
   - To install Go.Data for all of your workstation users, select **Anyone who uses this computer.**
   - To install for the current user only, select **Only for me.**
4. Click the **Next** button.

   The Go.Data installation program displays the Choose Install Location screen.
5. Choose one of the following installation types:
   - If you are installing Go.Data on a server, chose **Server**.
   - If you are installing on a stand-alone computer, choose **Local installation**.
6. Select a location folder to install Go.Data and click the **Install** button.

   The Go.Data installation program installs Go.Data and displays the Completing Go.Data Setup screen.

7. Select the **Run Go.Data** check box and click the **Finish** button to launch Go.Data.

To install Go.Data on Mac



To install and run Go.Data from files provided by a Go.Data system administrator, your Mac needs to be able to download and allow apps to run that have been provided by identified developers, as well as from the App Store.

For more information on this security setting, see the Apple support information on Gatekeeper or the System Preferences appropriate for your version of iOS.

1. Locate the DMG installation file that you downloaded, for example, from the ~/Downloads folder, and double click to launch the Go.Data installation program.

   The Go.Data installation program opens the DMG volume, verifies the code, and displays the Go.Data License Agreement.
2. Review the Go.Data license agreement and click the **Agree** button.

   The Go.Data installation program displays the installer window.
3. In the installer window, drag the Go.Data application icon to the Applications folder icon.

   The Go.Data application program copies the files to your ~/Applications folder and adds the Go.Data application icon to the Mac menu bar.
4. Close the installer window, eject the DMG volume and drag the downloaded DMG file to the trash as it is no longer necessary.

To install Go.Data on Linux

Go.Data is available for use on Linux workstations. You are advised to install Go.Data via the installation methods recommended by your Linux distribution, for example using the Ubuntu Software Center for Ubuntu Linux.

Installing Go.Data on mobile devices

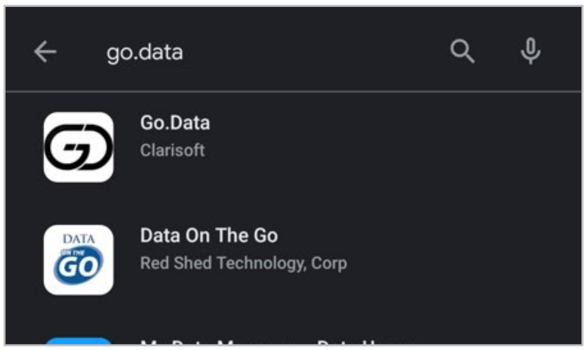
The following sections provide general information about installing Go.Data on a mobile device, such as a smartphone or tablet. To begin the installation process, you need to locate the Go.Data mobile application on your device's application store.

The Go.Data installation program sets up all Go.Data files in order for you to run the application on your mobile device.

It is recommended that you close all open applications and adequately charge your device before you begin the Go.Data installation process.

To install Go.Data on an Android device

Running Go.Data on an Android device currently requires Android 5.0 or later.



1. Locate and open the Google Play store application on your mobile device.

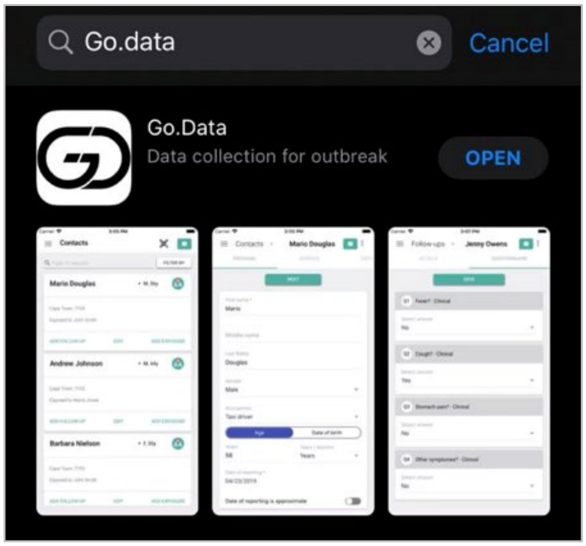
   Your device launches the Google Play store application.
2. Type **Go.Data** in the application's search field.

   The Google Play store displays a list of applications matching the Go.Data search query.
3. Click on the Go.Data application tile and click the **Install** button.

   Your device downloads and installs the Go.Data mobile application.

To install Go.Data on an Apple mobile device

Running Go.Data on an iOS device currently requires iOS 9 or later.



1. Locate and open the App Store application on your mobile device.

   Your device launches the App Store.
2. Type **Go.Data** in the application's search bar and locate the Go.Data application.

   The Apple App Store displays a list of applications matching the Go.Data search query.
3. Click the **Get** button.

   Your device downloads and installs the Go.Data mobile application.

Chapter 4 – Starting Go.Data

After you have installed Go.Data on your personal workstation or on a server, you can launch and begin setting up the application.

By default, Go.Data checks for updates every time you open the application.

Go.Data is preconfigured with a standard system administrator user name and password. You must create your own user name and password upon launching Go.Data for the first time.

After you have started the Go.Data application and created a unique user name and password, you can update your user profile, set up password recovery information, and create new personal preference settings, such as custom filters, default import mapping, and personal cloud back up information.

NOTE	You need to start and set up Go.Data from a personal workstation before using the Go.Data mobile application.

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Starting Go.Data

For all versions of Go.Data, upon starting for the first time, Go.Data prompts you to update the application if a new version is available.

New versions of Go.Data typically include security updates, feature updates, and bug fixes. It is important for the security and functionality of your system to update Go.Data when prompted.

In addition, you can change the default Go.Data port configurations before starting Go.Data for the first time.

For Windows, you can right-click the Go.Data icon in the system tray to access a list of Go.Data options, including

- open Go.Data
- reset admin password
- restore backup
- settings
- check for updates
- log directories
- quit Go.Data.

For Mac to install and run Go.Data from files provided by a Go.Data system administrator instead of from the App Store, you must be able to download and allow apps to run that have been provided by identified developers, as well as from the App Store.

For more information on this security setting, see the Apple support information on Gatekeeper or the System Preferences appropriate for your version of iOS.

Also for Mac, in the default Go.Data configurations, you may also choose to encrypt the data using the Apple FileVault feature in addition to configuring the ports. Please note, however, that if you forget or lose your Mac credentials, you will not be able to unlock FileVault and will lose access to your encrypted data.

For more information on using Apple FileVault, please see the Apple support information on FileVault appropriate for your version of iOS

For Mac, you can click the Go.Data icon in the Mac menu bar to access a list of Go.Data options including

- open Go.Data
- reset admin password
- restore backup
- settings
- check for updates
- quit Go.Data.

For Linux, you are advised to follow the application launch methods recommended by your Linux distribution.

To start Go.Data on Windows

1. To start Go.Data, do one of the following:
   - Locate the application on your personal workstation and click the desktop icon.
   - Select **Go.Data** from the Windows Start menu.
2. If the Go.Data Updater is displayed, click **Yes** to update your version of Go.Data to the newest available.

   The Default Go.Data configuration dialog window opens.

3. Accept these default settings or update if the machine where you are installing Go.Data requires certain settings:
   - **Mongo port**: This setting determines what port your system uses to access the Go.Data database.
   - **Go.Data port**: This setting determines what port your system uses to access Go.Data.
4. Click the **Launch Go.Data** button.

   Go.Data configures the app, as well as updates the database and populates it with the most current information. These steps may take a few minutes for the installation to complete.

To start Go.Data on Mac

1. Locate the Go.Data application icon on your desktop or in the ~/Applications folder and double-click the icon.

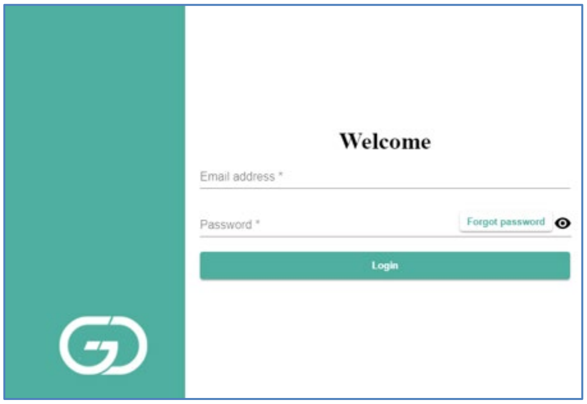
   The first time you open the Go.Data application, you may be asked to confirm that the Go.Data app is an application downloaded from the Internet and that you wish to open it. The message may vary depending on your version of iOS.
2. On the confirmation dialog window, click **Open** or see the Apple support information on Gatekeeper or the System Preferences.

   The Default Go.Data configuration dialog window opens.
3. Accept these default settings or update if the machine where you are installing Go.Data requires certain settings:
   - **Mongo port**: This setting determines what port your system uses to access the Go.Data database.
   - **Go.Data port**: This setting determines what port your system uses to access Go.Data.
   - **Encrypt data with FileVault**: This setting is enabled by default and ensures that data on your local computer is encrypted using the Apple FileVault feature and is only available with your login credentials. If you forget or lose your login credentials, however, the data will not be recoverable from your local computer.
4. Click the **Launch Go.Data** button.

   Go.Data configures the app, as well as updates the database and populates it with the most current information. These steps may take a few minutes for the installation to complete.

Logging in to Go.Data the first time

When you launch Go.Data for the first time, you must enter the default system administrator email address and password to access the application.



NOTE	If you are running Go.Data as a standalone application from your computer, Go.Data starts in its own browser. You can switch to another browser by using Open in browser functionality.

After you have logged into Go.Data for the first time using the default system login information, you can create a new password, edit your user profile information, and configure the Go.Data system for additional users.

To log in to Go.Data the first time

1. Open the Go.Data application.

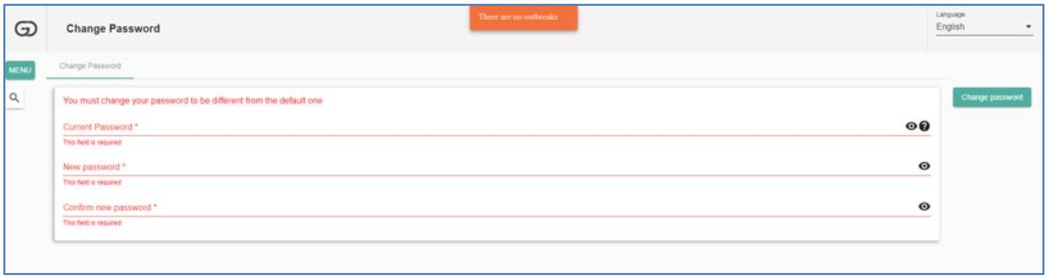
   Go.Data displays the Welcome screen.
2. Complete the Welcome fields using the default Go.Data system administrator credentials and click the **Login** button.

   - **Email address**: Enter **admin@who.int**.
   - **Password**: Enter **admin**.

   Go.Data completes the login process and displays the Change Password screen.

Creating a new password

Upon logging into Go.Data for the first time, you must change your password from the default system administrator password. This process ensures the minimum data security requirements are met when users install a new instance of Go.Data on a machine.



Go.Data requires that your new password must contain at least 12 characters. Go.Data does not enforce additional password requirements, such as using special characters.

To create a new password when logging into Go.Data the first time

1. Complete the Change Password fields and click the **Change password** button.

   - **Current password**: Enter **admin**.
   - **New password**: Enter a new password.
   - **Confirm new password**: Enter the same password you entered in the New password field.

   Go.Data displays the We recommend setting the security questions message.

Setting up security questions

When you change the default Go.Data password, Go.Data prompts you to set up security questions. This step is optional, and you can complete it at the later stage.

These security questions allow you to recall and change your password even if there are connectivity issues and a reminder email cannot be sent.

To set up security questions

1. Click the **Set security questions** button.

   Go.Data displays the Set security questions screen.

2. Complete the Security Questions fields and click the **Save** button

   - **Question 1**: Select a security question from the drop-down menu.
   - **Answer 1**: Enter an answer to the question you selected in the Question 1 field.
   - **Question 2**: Select a security question from the drop-down menu.
   - **Answer 2**: Enter an answer to the security question you selected in the Question 2 field.

   Go.Data navigates to the Set security questions screen and displays the data entry complete message.

Logging in to Go.Data

To begin recording outbreak data using Go.Data, you must first log in to the application.

Go.Data has the capability of documenting sensitive, private information, such as addresses, family information, lab results, and diagnosis information. Logging in and out of Go.Data prevents malicious users from accessing this confidential personal and health data.

To log in to Go.Data

1. Open the Go.Data application.

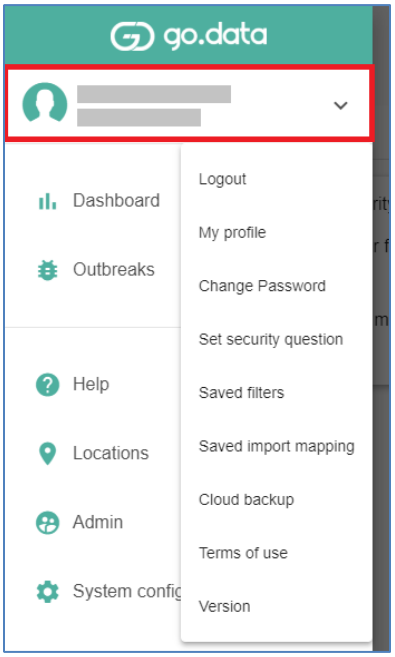
   Go.Data displays the Welcome screen.
2. Complete the Welcome fields using your personal login credentials.

   - **Email address**: Enter the email address associated with your Go.Data account.
   - **Password**: Enter the password you created for your Go.Data account.

   Go.Data completes the login process and displays the dashboard.

Working with profile information

Upon logging into Go.Data for the first time, you can update your user profile information by accessing the User section drop-down menu within the Go.Data navigation menu. The navigation menu is located in the upper left of the application.

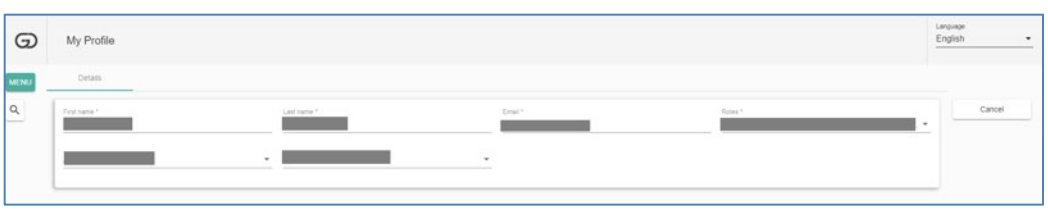


Within the User section drop-down menu, you can complete profile maintenance tasks such as viewing a profile, updating a profile, changing a password, and setting up security questions. Within this menu, you can also view saved filters, view saved import mapping, and set your personal cloud backup location. You can also update your profile information at any time.

Finally, the User section drop-down menu houses Go.Data's terms of use and current version number information.

Viewing my profile details

Viewing profile details allows you to review your personal account information, as well as your email, role, assigned outbreaks, and active outbreak.



From the User section drop-down menu, you can only view your profile details. For more information on user accounts, see Introduction to user accounts.

My profile field definitions

Item	Description
First name	The given name of the individual.
Last name	The family name of the individual.
Email	The email address associated with the user profile.
Roles	The type of permissions granted to the user by the system administrator.
Available outbreaks	The outbreaks to which the user has access in Go.Data.
Active outbreak	The outbreak currently being recorded by the user.

To view my profile details

1. Select **Menu > User section drop-down menu > My profile**.

   Go.Data displays My profile details.

Changing passwords

You can change your Go.Data password at any time, regardless of your assigned role in Go.Data. During an outbreak, you may need to update your password regularly to avoid compromising recorded personal and health data if you believe your password has been stolen.

Go.Data requires that all passwords contain at least 12 characters. Go.Data does not enforce additional password requirements, such as using special characters.

To change a password

1. Select **Menu > User section drop-down menu > Change password**.

   Go.Data displays the Change password screen.
2. Complete the change password fields.
   - **Current password**: Enter your current Go.Data password. Required.

- **New password**: Enter a new password. Required.
- **Confirm new password**: Enter the exact password you entered in the New password field. This field is used to confirm typing accuracy and recall of the new password. Required.

3. Click the **Change password** button.

   Go.Data displays a confirmation message and displays the dashboard.

Modifying security questions

Security questions allow you to recall and change your password even if there are connectivity issues and a reminder email cannot be sent. By correctly answering these security questions, Go.Data allows you to create a new password and access your Go.Data account.

You can edit your security questions and answers at any time while logged in to your Go.Data account.

To modify your security questions

1. Select **Menu > User section drop-down menu > Set security question**.

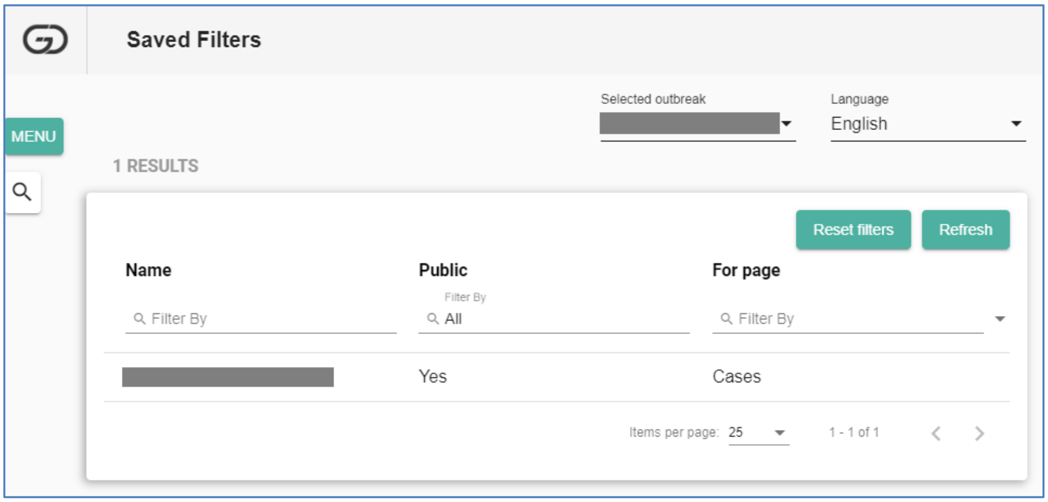
   Go.Data displays the Set security questions screen.
2. Click the **Edit** button.
3. Complete the Set security questions fields:

   - **Question 1**: Select a security question from the drop-down menu of pre-existing security questions. Required.
   - **Answer 1**: Enter an answer to the security question you selected in the Question 1 field.
   - **Question 2**: Select a security question from the drop-down menu of pre-existing security questions. Required.
   - **Answer 2**: Enter an answer to the security question you selected in the Question 2 field.

4. Click the **Save** button.

   Go.Data displays a confirmation message and displays the Set security questions screen.

Viewing saved filters



Go.Data provides filtering tools to help you search for and view data according to a specific set of parameters. For ease of use, Go.Data allows you to save regularly used filters for your own use (private) or also for use by other Go.Data users in the active instance (public).

For more information on using, creating, and saving filters, see Using filters.

Saved filters field definitions

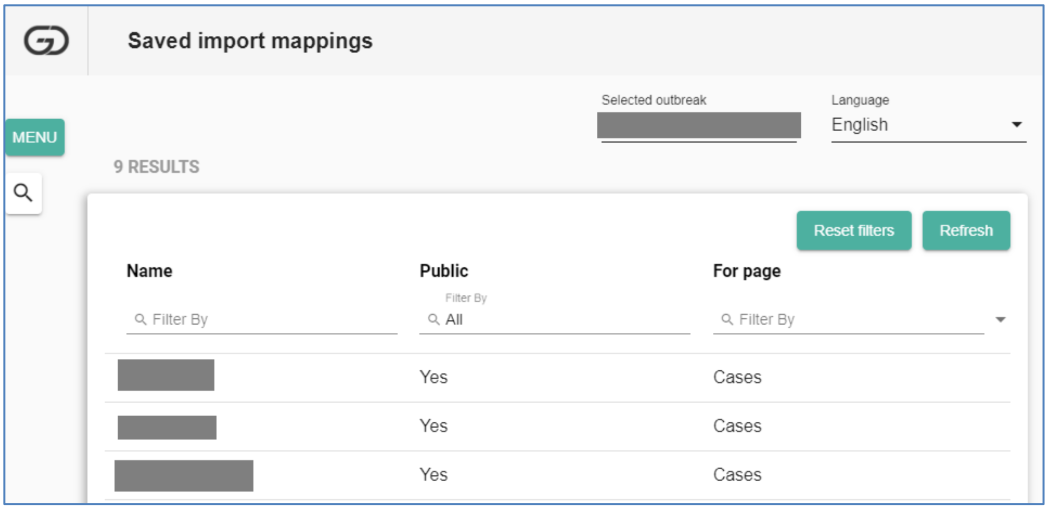
Item	Description
Name	The user-generated name of a saved filter.
Public	Displays Yes or No to indicate if a saved filter is available for use by all users in the active instance of Go.Data.
For page	Displays the Go.Data section sorted by the saved filter.

To view saved filters

1. Select **Menu > User section drop-down menu > Saved filters**.

   Go.Data displays the Saved filters list.

Viewing saved import mappings



The import of outbreak data via a file allows information to be imported from a structured data file, for example, Microsoft Excel or comma-separated value (csv).

Go.Data allows you to save import mapping details, which saves time during the import process and ensures your local fields are mapped correctly to the existing Go.Data fields when importing data to the application. For ease of use, Go.Data allows you to save multiple import mappings for public (all users in the active instance) or personal use (only the individual user).

For more information on how Go.Data manages different instances, see Where does my data go and how does it relate to the outbreak?

Saved import mapping field definitions

Item	Description
Name	The user-generated name of a saved import mapping.
Public	Displays Yes or No to indicate if a saved import mapping is available for use by all users in the active instance of Go.Data.
For page	Displays the Go.Data section to which the import mapping applies.

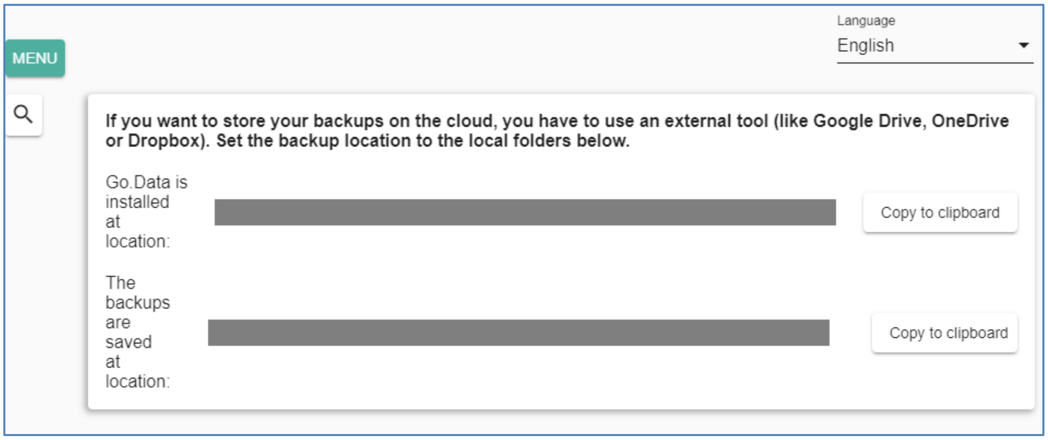
To view a saved import mapping

1. Select **Menu > User section drop-down menu > Saved import mapping**.

   Go.Data displays the Saved import mappings list.

Viewing personal cloud backup locations

Within the user profile menu, you can view the personal cloud backup location. This screen in Go.Data displays the location used to create Go.Data backup files.



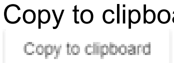
You can use the information on the Cloud backup screen to identify a source for a cloud backup service, such as OneDrive or Dropbox. This screen provides a quick mechanism for ensuring that your application data is stored off-site, such as for disaster recovery.

Go.Data provides additional functionality for creating automatic backups. For more information on configuring system backups, see Configuring automatic backups.

Cloud backup field definitions

Item	Description
Go.Data is installed at location	Displays the local workstation path to locate the Go.Data application files.
The backups are saved at location	Displays the local workstation path to locate the Go.Data backup files.

Cloud backup actions

Item	Description
Copy to clipboard 	This button copies the file path to your clipboard, allowing you to easily paste the path in another location.

To view the personal cloud backup location

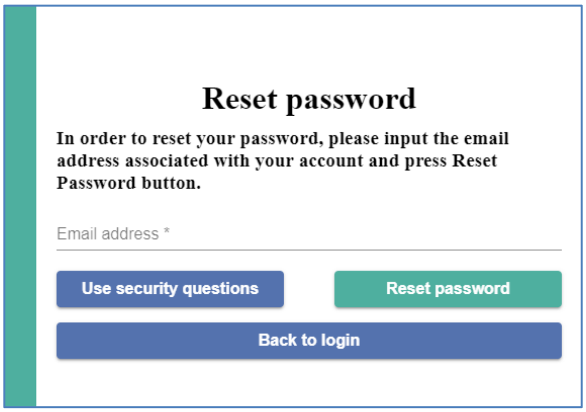
1. Select **Menu > User section drop-down menu > Cloud backup**.

   Go.Data displays the Cloud backup screen.

Using the Forgot password feature

If you forget your password for logging in to Go.Data, the system provides two methods to help you gain access to the system:

- **Email recovery**: Go.Data sends password recovery instructions to the email address associated with the account.
- **Security questions**: You can answer your predefined security questions to gain access to the Go.Data system.



You can use email password recovery if you have an existing internet connection and if you did not set up security questions when creating your Go.Data user account. Security questions allow you to reset your password when you do not have internet access.

NOTE	In the event of a catastrophic password loss, a system administrator can reset the admin password. On Windows, right-click on the Go.Data icon in the Windows tray and select **Reset Admin Password**. On Mac, click the Go.Data icon in the Mac menu bar and click **Reset Admin Password.**

Cloud backup field definitions

Item	Description
Email address	The email address associated with your Go.Data user account.
Question	A drop-down menu of pre-existing security questions.
Answer	Your answer to the security question listed above.

Cloud backup actions

Item	Description
Use security questions 	This button takes you to a screen that allows you to reset your password by selecting and answering personal security questions.

Item	Description
Reset password 	This button submits the password recovery form.
Back to login 	This button navigates you to the Go.Data welcome screen.

To reset your Go.Data password

1. Open the Go.Data application.

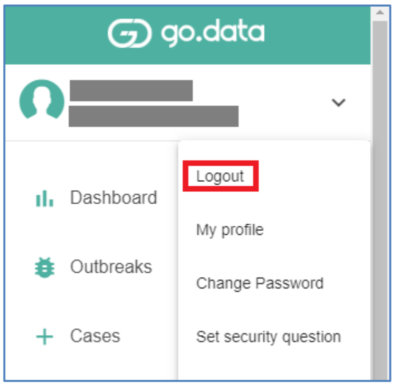
   Go.Data displays the Welcome screen.
2. Click the **Forgot password** button.

   Go.Data displays the Reset password screen.
3. Enter your email address to reset your Go.Data password using the email recovery option or click the **Use security questions** button to complete the security questions and reset your password using the security questions option.
4. Click the **Reset password** button.

   Go.Data displays a confirmation message and displays the Welcome screen.

Logging out

By logging out of Go.Data, you ensure that other people cannot access the application without first entering their personal login credentials. Due to the private nature of the information recorded within Go.Data, it is best practice to log out of the application when it is not in use.



To log out of Go.Data

1. Select **Menu > User section drop-down menu > Logout**.

   Go.Data logs you out of the application and displays the Welcome screen.

Chapter 5 – Using Go.Data

Upon logging into Go.Data, the first page you can view is the dashboard. The dashboard contains gauges, charts, an epidemiological curve, and key performance indicators (KPIs) summarizing information to give you an overview of the active outbreak.

Additionally, by clicking the Menu button, you can open the Go.Data navigation pane and open other views within the application, such as Outbreaks, Cases, and Lab Results. As you navigate your way through the different features within Go.Data, the application's breadcrumbs help you keep track of the pages you have navigated through in the application.

The outbreak information stored by Go.Data is presented in a tabular format. These lists employ similar navigation functionality throughout the application's different views, including search, columns, filters, add, quick actions, aggregate statistics, table reset, refresh, bulk actions, and check boxes.

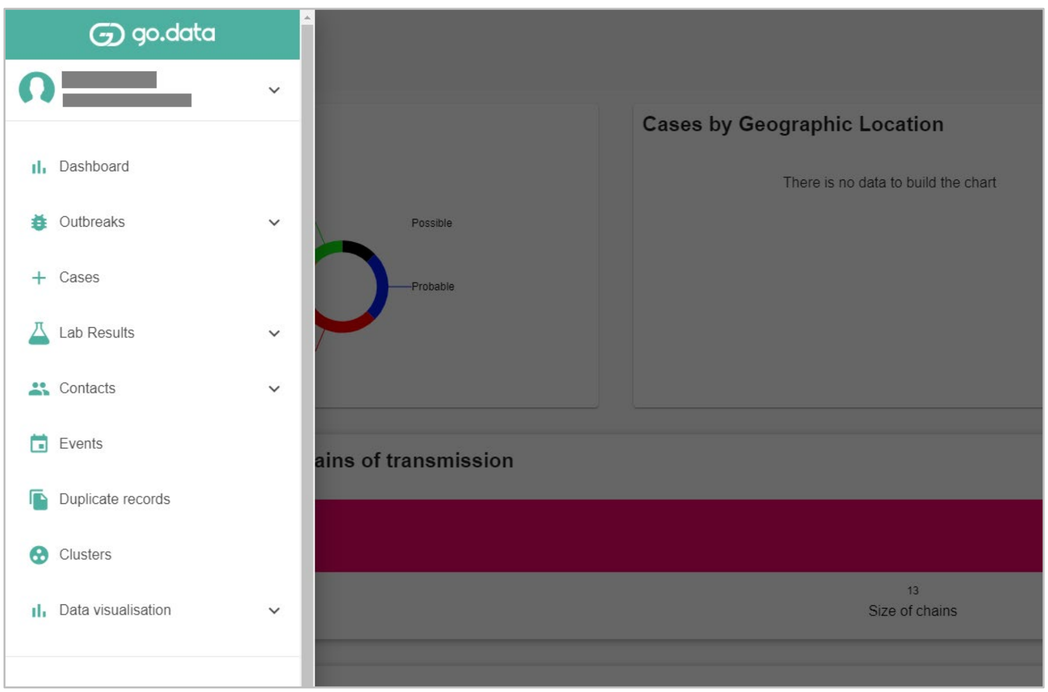
Chapter Contents

Introduction to navigating Go.Data

Go.Data relies on a left-hand primary navigation menu that lists the available features within the application. Through this navigation menu, you can select the feature within Go.Data to add, edit, or delete outbreak data.

The navigation menu contains the following features:

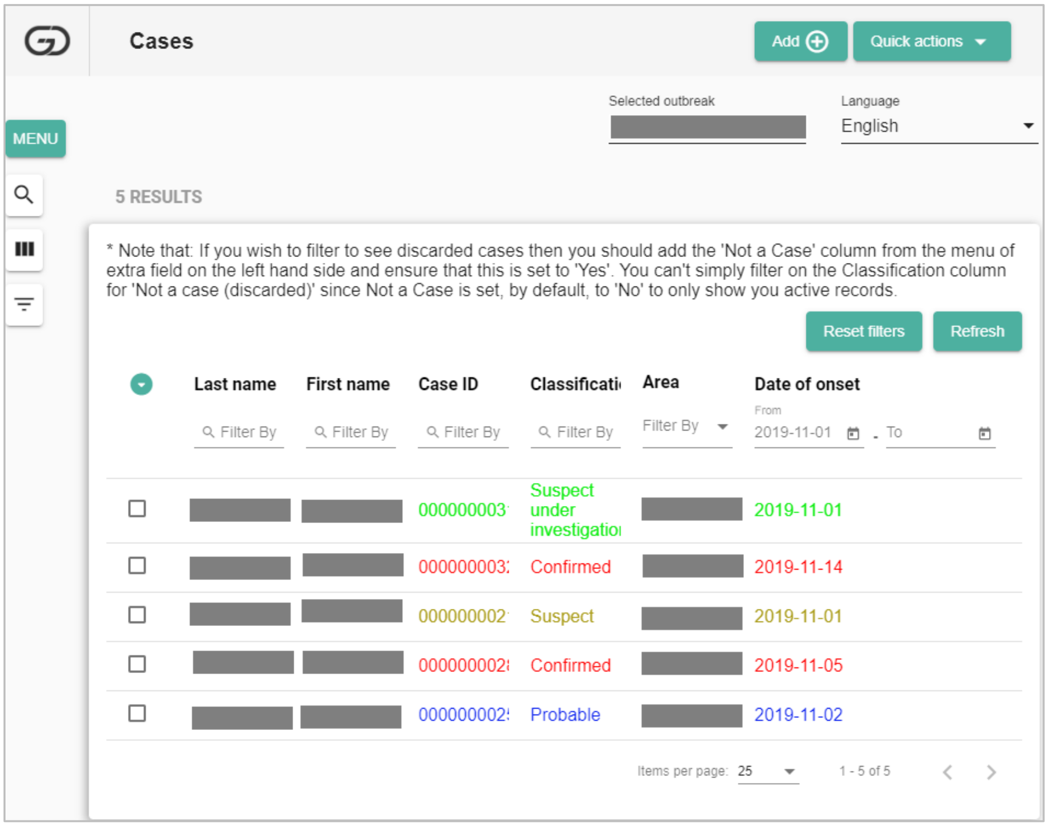
- User section
- Dashboard
- Outbreaks
- Cases
- Lab results
- Contacts
- Events
- Duplicate records
- Clusters
- Data visualisation
- Help
- Reference data
- Locations
- Admin
- System configuration.



The features available to you in this navigation menu depend on the user permissions defined by your Go.Data system administrator. For more information on managing Go.Data user permissions, see Introduction to user roles.

Working with lists

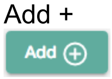
Go.Data displays data in a tabular list format. These lists provide a consistent presentation on the screen for working with information through the different features in Go.Data.



In addition, Go.Data lists contain consistent functionality to control the presentation of data on the screen and working with the outbreak data.

When you hover your mouse to the left end or to the right end of a row in a list, Go.Data displays additional hover actions, including view, modify, and options, depending on the specific feature. These actions are specific to the record over which you are hovering. Click a displayed icon to choose that action.

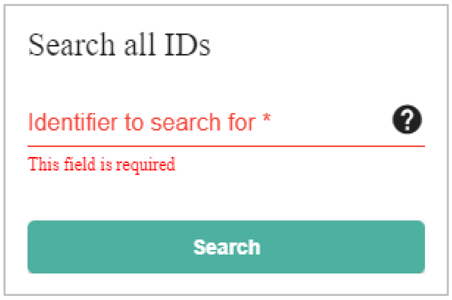
Go.Data list actions

Item	Description
Add + 	This button allows you to add a new list record.
Quick Actions 	This button opens a menu from which you may choose additional actions related to the list.
Search	This button opens the Search all Case IDs screen, which allows you to search Go.Data for a specific text string.

Item	Description
Columns	This button opens the Columns to display screen, which allows you to modify the columns displayed in the active list.
Filters	This button opens the Filters screen, which allows you to sort the data displayed in the active list.
Bulk Actions	This button opens a menu from which you may choose additional actions related to exporting one or more list records that you have selected by clicking the check box to the left of the record.
Reset filters Reset filters	This button returns the filters to the default setting and displays the list records accordingly.
Refresh Refresh	This button updates the display in the event that records have been added or modified.
Calendar	This button displays a calendar from which to enter date information.
Help	This button displays a tip for entering data or making a selection in the adjacent field.
Delete	This button removes data from the adjacent entry.
Items per page Items per page: 25	This field lets you select the number of records to view at one time in the active list.
Page left	This button allows you to view the records on the previous page of the list.
Page right	This button allows you to view additional records on the next page of the list.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a record in the active list.
Modify outbreak	This hover action opens allows you to edit the selected record in the active list.
View outbreak	This hover action allows you to view the selected record in the active list.

Using search

Go.Data contains search functionality to help you locate a specific record based on the record's identification number. You can easily access the search feature with Go.Data by clicking the search button, located on the left side of the application, below the menu button.



To use the search feature, type the record identification number you wish to locate within the Identifier to search for field. The system looks within the selected outbreak and across all case identification numbers, which were created when each case was added. The identification number you enter in the Identifier to search for field must match the record exactly.

For more information on when case ID numbers are created, see Adding or modifying cases.

To use the Go.Data search feature

1. Click the **Search** button.

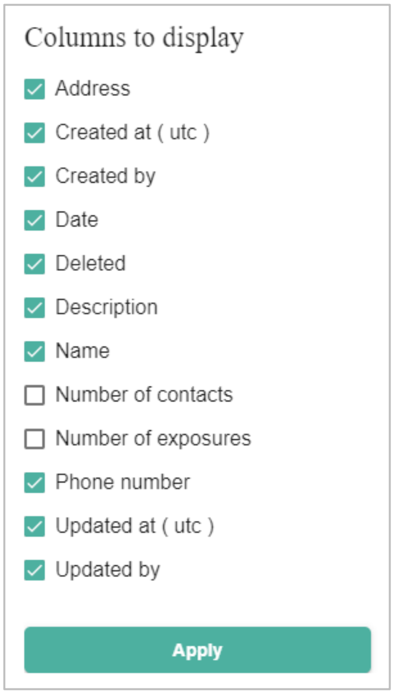
   Go.Data displays the Search all IDs screen.

2. Type the complete identification number (ID number) you want to locate in the **Identifier to search for** field and click the **Search** button.

   Go.Data displays the record matching the identification number.

Choosing columns to display

When viewing lists in Go.Data, often there will be more data recorded than your screen is capable of displaying. Go.Data contains functionality for you to select the columns you would like to display when viewing a list.



Choosing which columns to display can help you analyze critical data during an outbreak and recognize patterns and similarities between records. While you can edit which columns Go.Data displays for a list, you cannot edit the order in which Go.Data displays the columns. The columns available to display depend on the list you are viewing.

For more information on the data displayed by lists, see the related feature chapter.

To choose columns to display

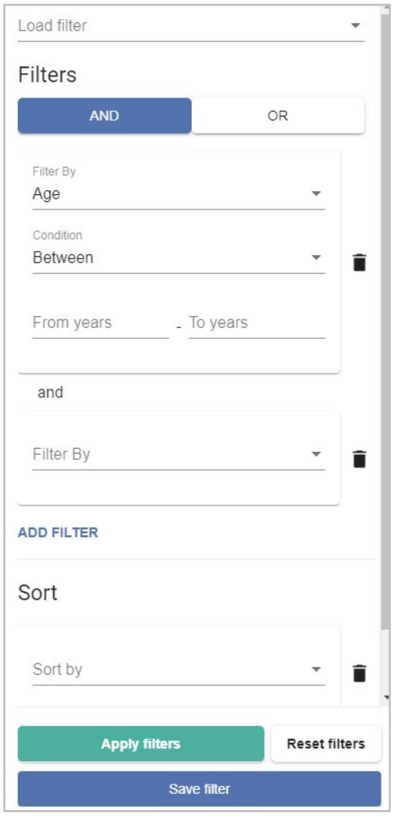
1. Click the **Columns** button.

   Go.Data displays the **Columns to display** screen.
2. Select the check boxes for the columns you wish to display and click the **Apply** button.

   Go.Data displays the selected columns for the list.

Using filters

Filters provide you with a way to view records that meet specific criteria. Using filters, you can search for a specific record or group of records that have a similar data point in common.



The filter you create applies to the list you are actively viewing in Go.Data.

Additionally, Go.Data allows you to save filters for future use. For example, this functionality gives Go.Data administrators, team leaders, and data analysts the tools to create complex filters for use by individual team members, who may not have as deep of an understanding of the data. For more information about saved filters, see Viewing saved filters.

To help further organize the data in your view, Go.Data also allows you to apply sort settings using filters.

Filters field definitions

Item	Description
Load filter	A drop-down list that displays all available saved filters.
Filter by	A drop-down list displaying all columns for the active feature that can be filtered.
Condition	A drop-down list of conditional phrases used to sort data.
Sort by	A drop-down list that displays all columns for the active feature that can be sorted.

Filters actions

Item	Description
And AND	This button allows you to create an AND statement using filters.
Or OR	This button allows you to create an OR statement using filters.
Add filter ADD FILTER	This text allows you to add an additional filter to the condition entered above.
Add sort rule ADD SORT RULE	This text allows you to sort the filtered data in ascending or descending order.
Apply filters Apply filters	This button applies the filters to the data displayed in the active list.
Reset filters Reset filters	This button returns the filters to the default setting and displays the list records accordingly.
Save filter Save filter	This button opens the Save filter dialog box, in which you can give the filter a name and save it for future use.

To apply filters

1. Click the **Filters** button.

   Go.Data displays the Filters screen.
2. Complete the **Filters** fields:

   - **Load filter**: Select a saved filter from the drop-down menu.
   - **And/Or**: Click one of these buttons to create an AND or OR statement using the filter.
   - **Filter By**: Using the drop-down menu, select a data point by which to filter the data. The selections available will depend on your Filter By drop-down menu selection.
   - **Condition**: Select a conditional statement for filter. The selections available will depend on your Filter By drop-down menu selection.
   - **Specific filter**: Depending on your Filter By drop-down menu selection, Go.Data may provide an additional field to define your filter. Examples include, keyword, filter by, and from-to.
   - **Add Filter**: Click this button to create additional filter criteria.
   - **Sort by**: Select a condition from the drop-down menu to organize the filtered data.
   - **Order**: Select ascending or descending.
   - **Add sort rule**: Click the button to create additional sort criteria.
3. Click the **Apply filters** button.

   Go.Data displays the filtered list.

To save a filter

1. Complete steps 1 and 2 of To apply filters

2. to apply filters and click the **Save filter** button.

   Go.Data displays the Enter a name for the new filter message.

3. Complete the following fields:

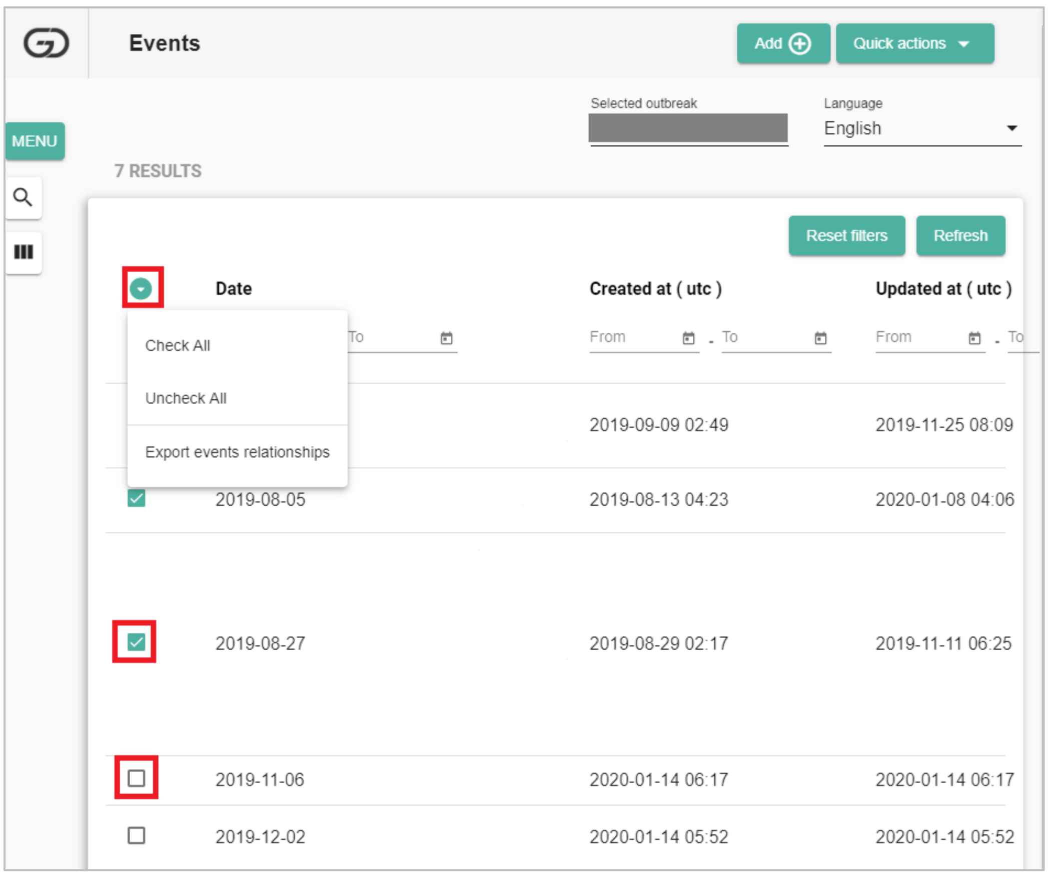
   - **Name**: Enter a name to save the filter as.
   - **Public**: Select this toggler to make the filter public for use by other users in your active instance of Go.Data.

4. Click **Save Filter**.

   Go.Data displays the Filter saved message.

Completing bulk actions

When you have to work with multiple data entries in a list simultaneously, Go.Data contains limited functionality for completing bulk or multi-record actions through the Bulk actions drop-down menu.



To complete bulk actions within Go.Data, you must select the checkboxes for the affected records in the list, then make a selection from the Bulk Actions drop-down menu.

For example, you can modify multiple contacts at the same time by selecting the checkboxes next to the records, clicking the bulk action drop-down arrow, and selecting **Modify selected contacts**.

The bulk actions available to you vary based on the feature you are viewing. Generally, the Bulk Actions drop-down menu contains actions related to exporting data or expanding/collapsing individual entries in a list. The Bulk Actions drop-down menu also contains functionality for selecting and deselecting all individual records in a list.

The Bulk Actions drop-down menu is available for the following Go.Data features:

- Cases
- Contacts
- Follow-ups for related contacts
- Events
- Duplicate records
- Reference data
- Users
- Roles
- Teams and assignments
- Client applications.

To complete a bulk action

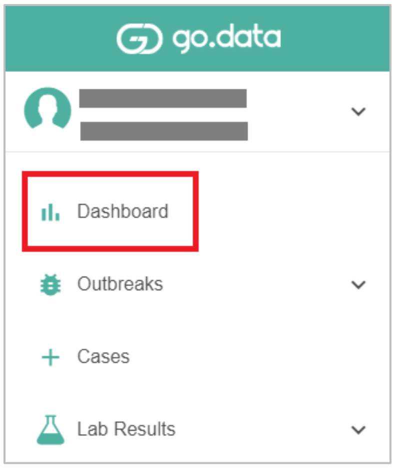
1. Navigate to a Go.Data feature with bulk actions available. For example, **select Menu > Events**.

   Go.Data displays the Events list.
2. Select the checkboxes for the list entries you wish to apply the bulk action to.
3. Click **the Bulk Actions** drop-down arrow and select a bulk action from the drop-down menu.

   Go.Data completes the bulk action.

Navigating the Dashboard

Upon logging in to Go.Data, the first feature displayed is the Dashboard. The Dashboard provides a summary of all data recorded in the application for the active outbreak.



To help users understand the overall impact of the active outbreak, the Dashboard displays gauges, charts, an epidemiological curve, and key performance indicators (KPIs). The Dashboard displays the following modules:

- Case summary
- Cases by geographic location
- Hospitalization summary
- Histogram – size of chains of transmission
- Epidemiological curve
- Contact follow-up report
- Cases based on contact status
- Cases KPIs
- Contacts KPIs
- Chains of transmission KPIs.

By interacting with the content displayed by the dashboard, you can view individual features and records within the application, view individual record counts, and edit the KPIs displayed. You can also use filters to further customize the data displayed by the dashboard.

Finally, you can generate reports from the Dashboard, using the **Reports** button, including

- Cases by classification and location
- Contacts follow up success rate
- Epi curve
- KPIs.

Regardless of where you are in Go.Data, you can access the Go.Data dashboard through the navigation menu.

Dashboard modules

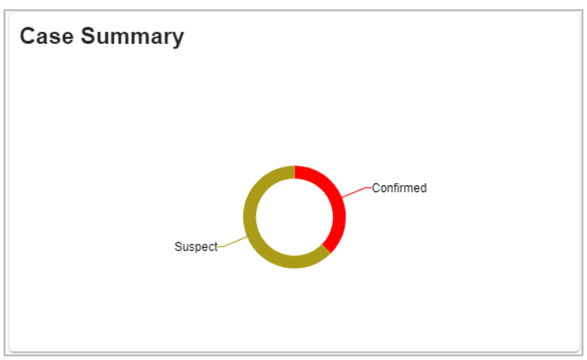
The individual Dashboard modules allow you to review summaries and visualisations of data recorded for the active outbreak.

You interact with the modules to edit the data displayed by the Dashboard by clicking, hovering, and scrolling. The ability to edit the data displayed varies by each Dashboard module.

In addition, you can make selections in the Epidemiological curve module to change the type of graph Go.Data displays. You can also rearrange and hide tiles displayed within KPI modules. Finally, you can use filters and adjust KPIs to determine the data displayed by the Dashboard.

Case summary module

The Case summary module displays a pie graph, which summarizes a count of the cases for the active outbreak by assigned case classification. The case classifications displayed are determined by the reference data for your instance of Go.Data and the classifications entered when recording case data for the active outbreak.



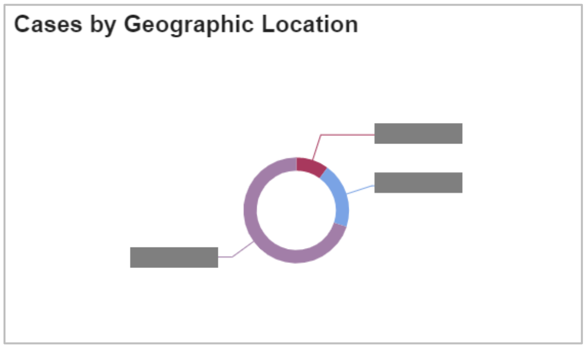
Cases summary module actions

Action	Description
Hover	Hover over a section of the Case summary pie graph to view a numerical count of cases that have been assigned that classification.
Click	Click a section of the Case summary pie graph to view a list of cases that have been assigned that classification.

Cases by geographic location module

The Cases by geographic location module displays a pie graph that summarizes a count of the cases for the active outbreak by area in which they were recorded. The areas displayed by the

Cases by geographic location module are determined by the countries, locations, and locations geographical level as defined when creating the outbreak.



Cases by geographic location module actions

Action	Description
Hover	Hover over a section of the Cases by geographic location pie graph to view a numerical count of cases that have been assigned to that area.
Click	Click a section of the Case summary pie graph to view a list of cases that have been assigned to that area.

To export the Cases by classification and location report

1. From the Dashboard, click the **Reports** button and select **Cases by classification and location**.

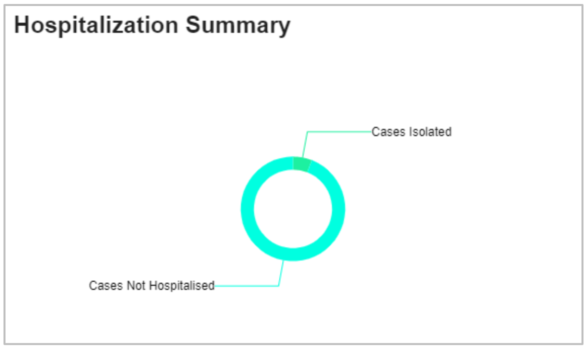
   Go.Data displays the Cases by classification and location message.
2. Complete the **Cases by classification and location** screen field.
   - **As type**: Select the file format type in which to export the report. Required.
3. Click **Export**.

   Go.Data exports the data in the selected file type.

Hospitalization summary module

The Hospitalization summary module displays a pie graph that summarizes a count of the cases for the active outbreak by the hospitalization/isolation type defined within the epidemiology details for a case.

The hospitalization/isolation types displayed are determined by the reference data for your instance of Go.Data and the hospitalization/isolation types entered when recording case data for the active outbreak.



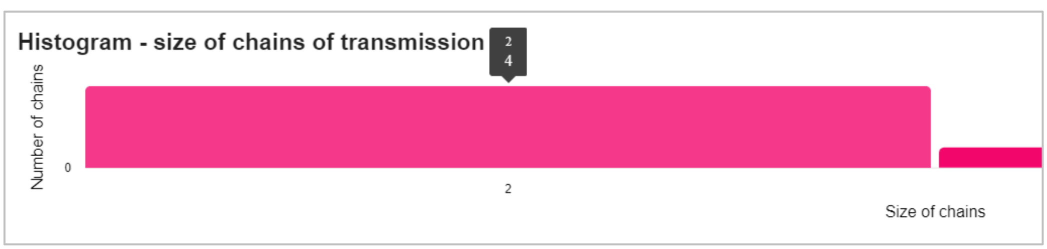
Hospitalization summary module actions

Action	Description
Hover	Hover over a section of the Hospitalization summary pie graph to view a numerical count of cases that have been assigned that hospitalization/isolation type.
Click	Click a section of the Case summary pie graph to view a list of cases that have been assigned to that hospitalization/isolation type.

Histogram – size of chains of transmission module

The Histogram – size of chains of transmission module displays a graph that visualises the number of chains of transmission in the active outbreak by size. This module displays chains with two or more records and shows a count of records within the chains of transmission.

The data displayed by the Histogram – size of chains of transmission module directly correlates to the data reported in the Data visualisations feature of Go.Data.



Histogram – size of chains of transmission module actions

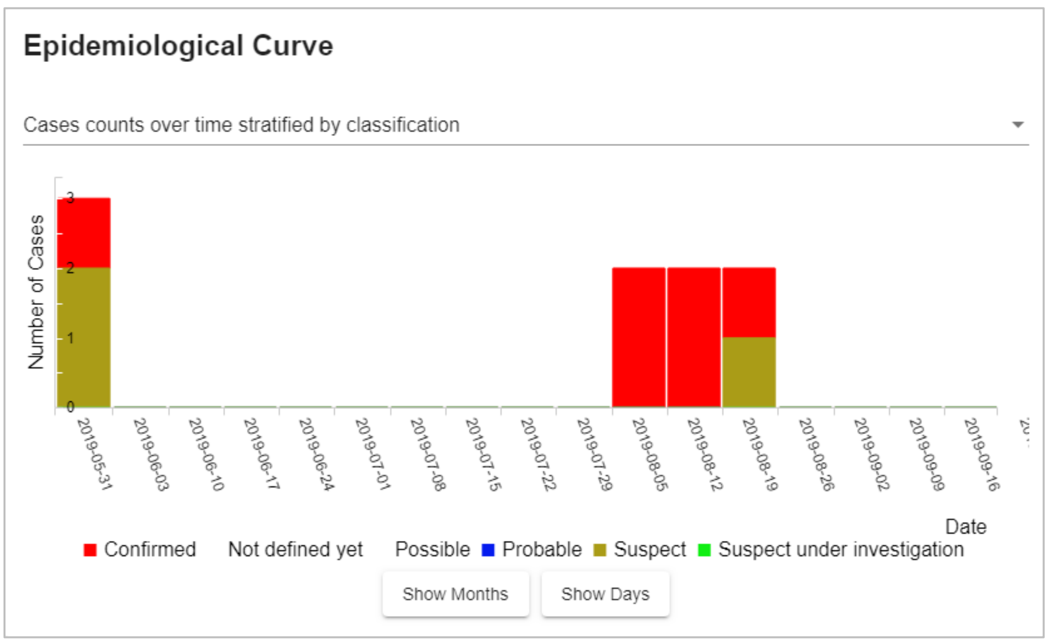
Action	Description
Hover	Hover over a bar in the Histogram – size of chains of transmission graph to view the number of chains of transmission of that size. For example, in the image above there are four chains of transmission that contain two records each.

Action	Description
Click	Click a bar in the Histogram – size of chains of transmission graph to view all chains of transmission of that particular size.

Epidemiological curve module

The Epidemiological curve module displays a graph that visualises case counts over time by classification. Additionally, you can use the drop-down menu to view case counts over time organized by outcome or by date of reporting organized by classification. You can use the **Show months**, **Show weeks**, and **Show days** buttons to change the date durations displayed on the graph's x-axis.

The data displayed by the Epidemiological curve graph directly correlates to the data recorded in the Cases feature of Go.Data, in addition to the case classifications and outcomes defined in the system's reference data.



Epidemiological curve module actions

Action	Description
Hover scroll	Hover over the Epidemiological curve graph and scroll to increase or decrease the date range displayed by the graph.
Drop-down menu	Click the drop-down menu to choose the type of data displayed by the Epidemiological curve graph.
Show months Show Months	Click this button to view data on the Epidemiological curve graph organized by month.

Action	Description
Show weeks Show Weeks	Click this button to view data on the Epidemiological curve graph organized by week.
Show days Show Days	Click this button to view data on the Epidemiological curve graph organized by individual date.

To export the Epi curve report

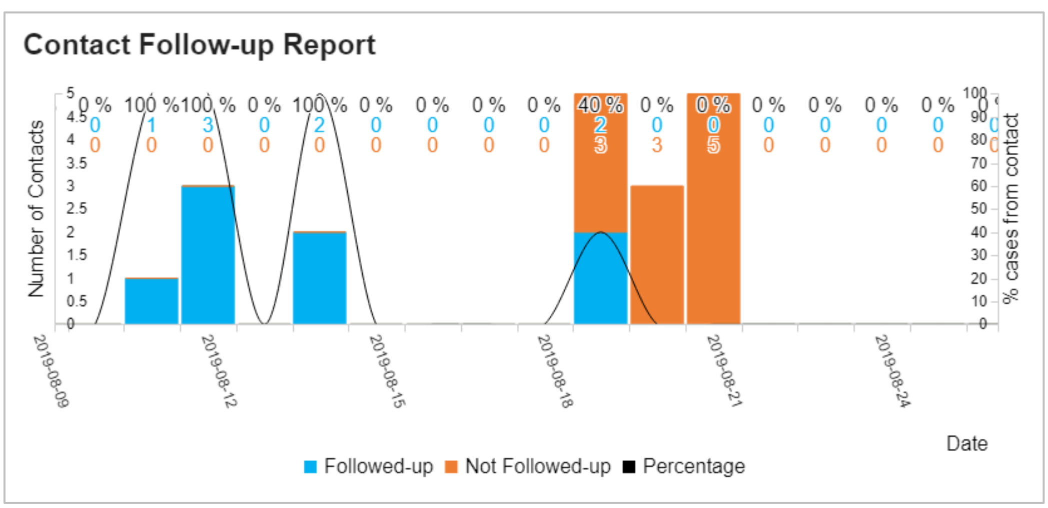
1. Navigate to **Dashboard > Epidemiological curve** module.
2. From the drop-down menu, choose one of the following report types:
   - Cases counts over time stratified by classification
   - Cases counts over time stratified by outcome
   - Cases counts over reporting time stratified by classification
3. To define the time period to display, click one of the following buttons:
   - **Show months**
   - **Show weeks**
   - **Show days**
4. At the top of the dashboard, click the **Reports** button and select **Epi curve**.

   Go.Data exports the data in the selected file type. After printing, you may wish to assemble the pages like a puzzle to hang on the wall.

Contact follow-up report module

The Contact follow-up report module displays a graph that visualises the number of contacts followed-up, the number of contacts not followed-up, and the relative percentage per day.

The data displayed by the Contact follow-up report graph directly correlates to the data recorded in the Contacts feature of Go.Data.



Contact follow-up report module actions

Action	Description
Hover scroll	Hover over the Contact follow-up report graph and scroll to increase or decrease the date range displayed by the graph.
Click and drag	Click, hold, and drag to the left or right to view additional data reported by the Contact follow-up report graph.

To export the Contacts follow up success rate report

1. From the Dashboard, click the **Reports** button and select **Contacts follow up success rate**.

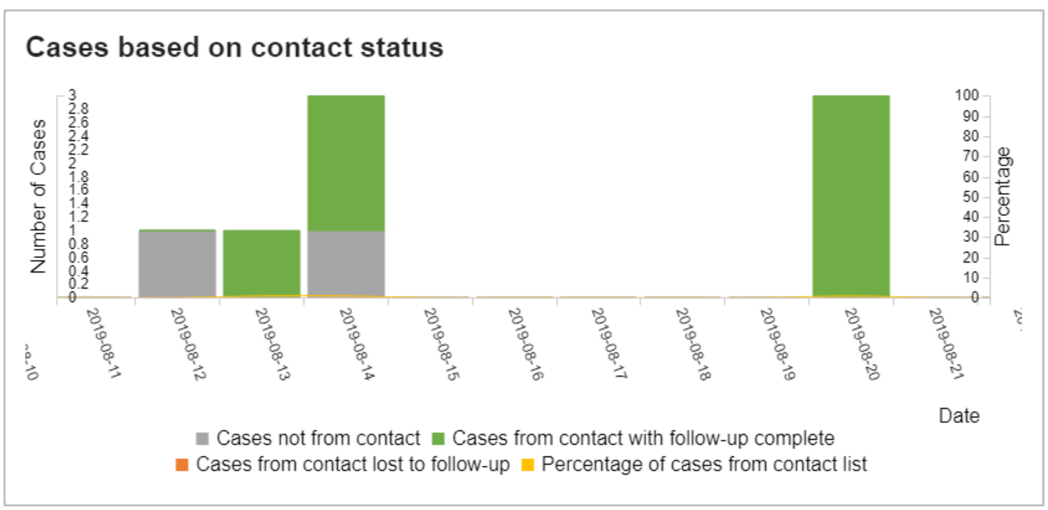
   Go.Data displays the Contacts follow up success rate message.
2. Complete the **Contacts follow up success rate** screen field.
   - **As type:** Select the file format type in which to export the report. Required.
3. Click **Export**.

   Go.Data exports the data in the selected file type.

Cases based on contact status module

The Cases based on contact status module displays a graph that visualises new cases not from a contact, new cases from a contact with follow-up complete, new cases from a contact that was lost to follow-up, and the percentage of cases from the contact list. This visualisation can help you determine if cases originate from known contacts.

The data displayed by the Cases based on contact status graph directly correlates to the data recorded in the Cases and Contacts features of Go.Data.



Cases based on contact status module actions

Action	Description
Hover scroll	Hover over the Cases based on contact status graph and scroll to increase or decrease the date range displayed by the graph.
Click and drag	Click, hold, and drag to the left or right to view additional data reported by the Cases based on contact status graph.

Cases KPIs module

The Cases KPIs module displays a number of blocks that highlight the important data points about cases for the active outbreak. The Cases KPIs module contains the following blocks:

- **Cases who have died**: The number of cases who have died during the active outbreak.
- **Cases currently hospitalized**: The number of cases actively in a treatment facility.
- **Cases with less than X contacts**: The number of cases who have fewer contacts than the selected number.
- **Cases refusing to be transferred to a treatment unit**: The number of cases who refuse to be admitted to a treatment facility.
- **Cases with pending lab results**: The number of cases who have been tested but have not received lab results.
- **New cases in the previous X days in known transmission chains**: The number of cases that have been reported in the selected number of days within an existing chains of transmission in Go.Data.
- **Cases not identified through contacts**: The number of cases that do not have an active relationship with an existing entry in Go.Data for the active outbreak.
- **New cases in the previous X days among known contacts**: The number of cases that have been reported in the selected number of days that have a relationship with an existing entry in Go.Data for the active outbreak.

Go.Data allows you to rearrange the KPI blocks, hide blocks, and show blocks. You can also set numerical thresholds for some blocks, including Cases with less than **X** contacts, New cases in the previous **X** days in known transmission chains, and New cases in previous **X** days among known contacts.

Cases KPIs module actions

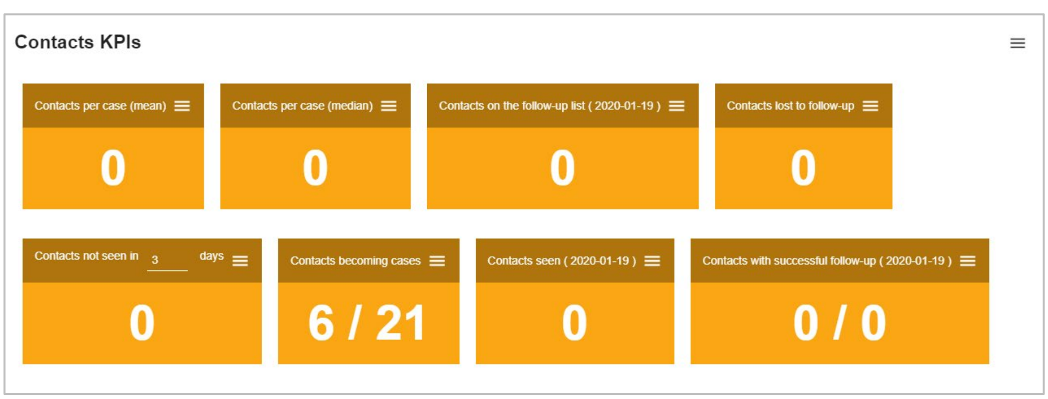
Action	Description
Cases KPIs menu	Click the Cases KPIs menu button and select **Show all** to display all blocks in the Cases KPIs module.
Block menu	Click the Block menu button to make selections to hide the block, move the block before the previous block, or move the block after the following block.
Numerical threshold selector	Click the up or down arrows to select the numerical threshold for a block.

Contacts KPIs module

The Contacts KPIs module displays a number of blocks that highlight the important data points about contacts for the active outbreak. The Cases KPIs module contains the following blocks:

- **Contacts per case (mean)**: The average number of contacts for a case in the active outbreak.
- **Contacts per case (median)**: The median number of contacts for a case in the active outbreak.
- **Contacts on the follow-up list (date)**: The number of contacts on the follow-up list for the current day.
- **Contacts lost to follow-up**: The number of contacts who are lost to follow-up.
- **Contacts not seen in X days**: The number of contacts that have not been seen in the selected number days.
- **Contacts becoming cases**: The number of contacts out of the total number of contacts that have become cases.
- **Contacts seen (date)**: The number of contacts that have been followed-up with for the current day.
- **Contacts with successful follow-up (date)**: The number of contacts that have been followed-up with for the current day out of the number of contacts that have follow-ups scheduled.

Go.Data allows you to rearrange the KPI blocks, hide blocks, and show blocks. You can also set numerical thresholds for Contacts not seen in **X** days.



Contacts KPIs module actions

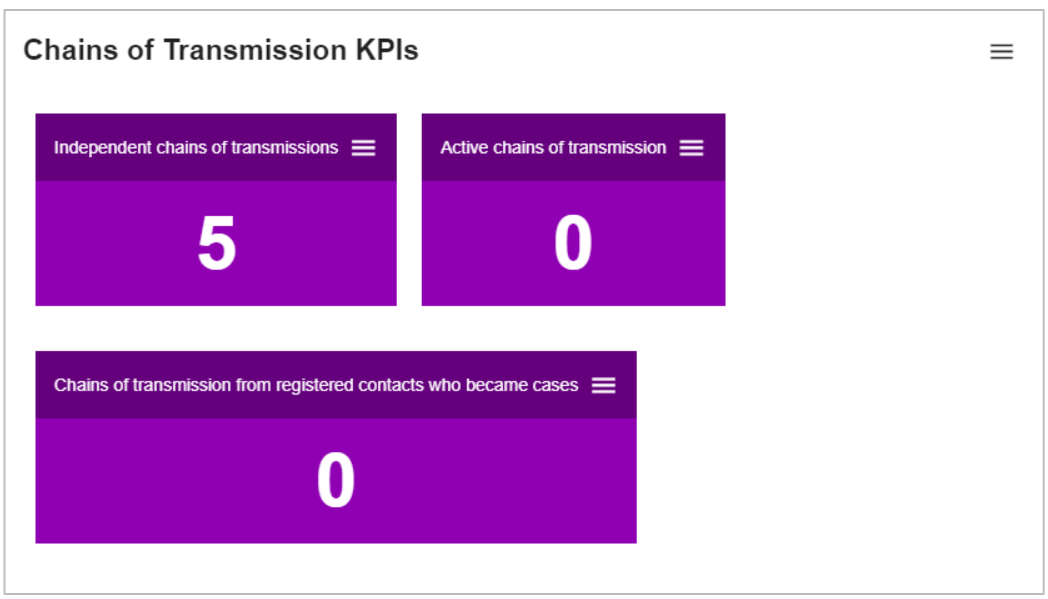
Action	Description
Contacts KPIs menu	Click the Contacts KPIs menu button and select **Show all** to display all blocks in the Contacts KPIs module.
Block menu	Click the Block menu button to make selections to hide the block, move the block before the previous block, or move the block after the following block.
Numerical threshold selector	Click the up or down arrows to select the numerical threshold for a block.

Chains of transmission KPIs module

The Chains of transmission KPIs module displays three blocks that highlight the important data points about chains of transmission for the active outbreak:

- **Independent chains of transmission**
- **Active chains of transmission**
- **Chains of transmission from registered contacts who became cases.**

Go.Data allows you to rearrange the KPI blocks, hide blocks, and show blocks.



Chains of transmission KPIs module actions

Action	Description
Chains of transmission KPIs menu	Click the Chains of transmission KPIs menu button and select **Show all** to display all blocks in the Chains of transmission KPIs module.

Action	Description
Block menu	Click the Block menu button to make selections to hide the block, move the block before the previous block, or move the block after the following block.

KPIs report

Go.Data allows you to export a printable report of the Cases KPIs, Contacts KPIs, and Chains of transmission KPIs modules. The printable KPIs report reflects the selections you make in the individual modules, including which blocks are displayed, which blocks are hidden, the order of the blocks, and the numerical selections made where required.

To export the KPIs report

1. On the **Dashboard**, order the KPIs sections and subsections and update them to reflect the data you wish to view.
2. From the **Dashboard**, click the **Reports** button and select **KPIs**.

   Go.Data exports the data in the selected file type. After printing, you may wish to assemble the pages like a puzzle to hang on the wall.

Part II – Outbreak and Case Management

Chapter 6 – Managing outbreaks

The Outbreaks feature in Go.Data can be used to record, monitor, and track an outbreak.

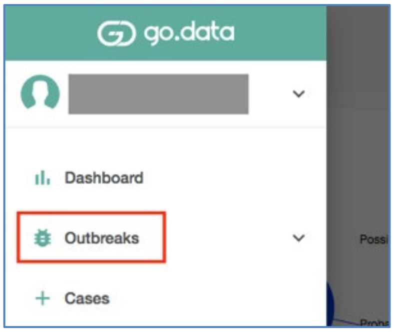
You can use the Go.Data outbreak functionality to set up a new incidence of a known or unknown disease. Once created, you can set an outbreak as active to begin investigating and recording data as it relates to cases, contacts, and events.

The Outbreaks feature is accessible via the main navigation. Administrators can limit the outbreaks a user can view and work with.

Go.Data also contains outbreak templates for a number of common diseases involving human-to-human transmission and a generic **unknown disease** template. When creating a new outbreak, an administrator can begin working from a template, then modify the data to accommodate the data of a specific outbreak for Go.Data users. Administrators can also create new templates in Go.Data as an investigation may require.

Chapter Contents

Introduction to outbreaks



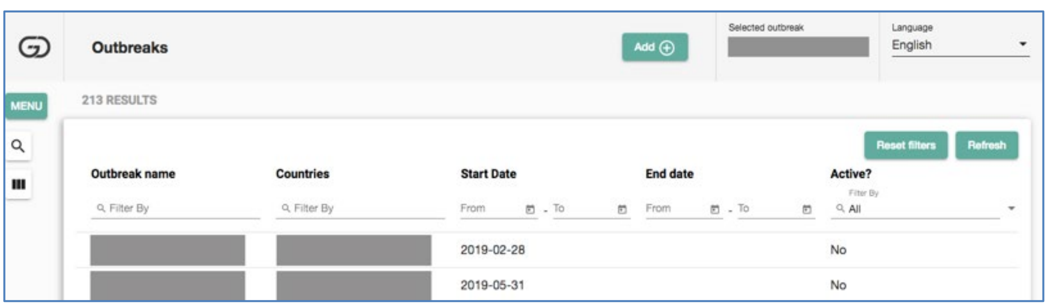
Viewing outbreaks, either all together or in a line list, is a core component of Go.Data. Most actions on outbreaks you may wish to take start from either the Outbreaks list or Outbreak details.

These views allow you to create new outbreaks, view outbreaks, initiate actions related to outbreaks, and edit outbreak questionnaire forms.

- **Outbreaks list**: a single location to view all outbreaks in Go.Data.
- **Outbreak details**: a single location to view the details, map server information, and questionnaire forms for a specific outbreak.

Outbreaks list

Viewing all outbreaks at one time allows you to review all outbreaks assigned to you in Go.Data, the affected geographical locations, outbreak date ranges, and outbreak active/inactive flag. You can use filters to view outbreaks with similar information.



The Outbreaks list provides a single location to view all outbreaks assigned to you in Go.Data. You can choose outbreaks for which to view more details or for which to initiate other actions, such as editing questionnaire forms. By default, the Outbreaks list shows all outbreaks assigned to you in Go.Data and are sorted in ascending order by outbreak name.

This list uses standard functionality as defined in Working with lists.

Outbreaks list field definitions

Item	Description
Active?	Yes designates the current active outbreak in Go.Data. This setting is user-specific.
Countries	A list of the countries where the outbreak has been located.
Created at (UTC)	Displays the time (UTC) the Created by user added the outbreak to Go.Data.
Created by	Displays the name of the user who added the outbreak to Go.Data.
Deleted	Yes indicates a user has deleted the record. No indicates a user has not deleted the record.
Disease	If known, the disease that is the subject of the outbreak.
End date	The known or approximate end data of the outbreak.
Location geographical level	The map administration level as defined in map servers.
Outbreak name	How a specific outbreak is identified and tracked in Go.Data.
Start date	The known or approximate start date of the outbreak.
Updated at (UTC)	Displays the time (UTC) the Updated by user saved the outbreak after modifying the data.
Updated by	Displays the name of the user who last modified the outbreak data.

Outbreaks list actions

Item	Description
Add + Add	This button allows you to add a new outbreak.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to an outbreak selected.
Set active	This hover action sets the outbreak selected to be the active outbreak for the user.
Modify outbreak	This hover action opens the outbreak selected so you may update the outbreak's information.
View outbreak	This hover action opens the outbreak selected so you may view the outbreak's information.

To view all outbreaks

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.

Outbreak details

Outbreak details provides a single location to review the recorded details and map server data associated with individual outbreak in Go.Data.

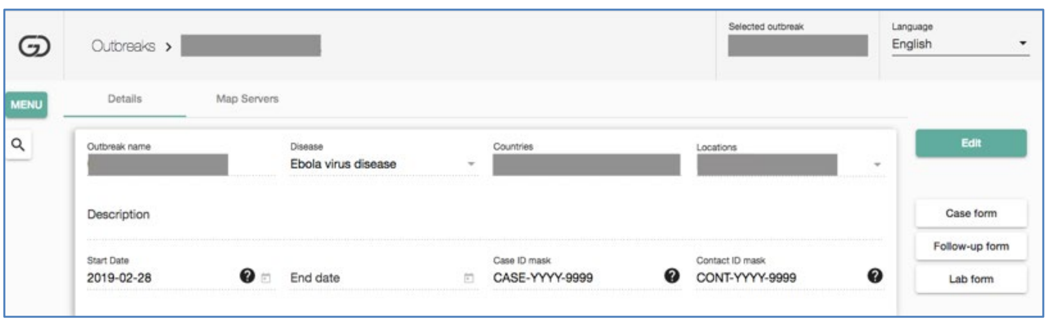
In addition, you can complete many actions related to an outbreak such as view outbreak details, edit outbreak details data, modify the active/inactive status for an outbreak, delete an outbreak, view outbreak inconsistencies, or clone an outbreak. You also edit the outbreak's questionnaire form data from Outbreak details. For more information, see Introduction to questionnaire forms.

Outbreak details includes information on these tabs:

- Details
- Map Servers.

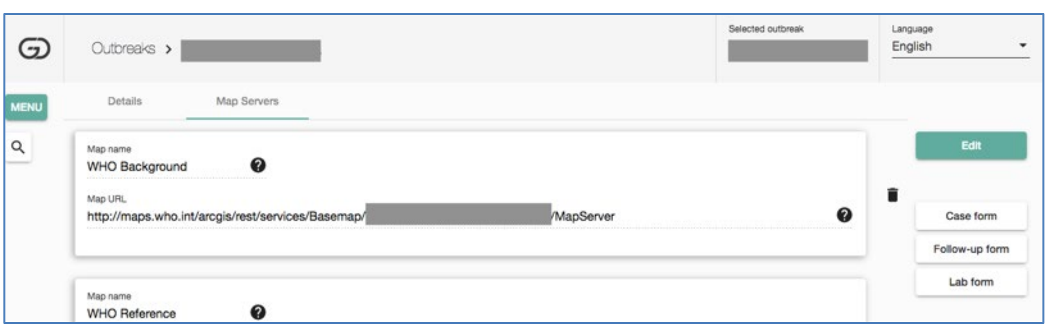
Details tab

The Details tab contains the core information about an outbreak. From this tab you can view an outbreak's name, disease under investigation, affected countries and locations, and critical Go.Data behaviour fields.



Map servers tab

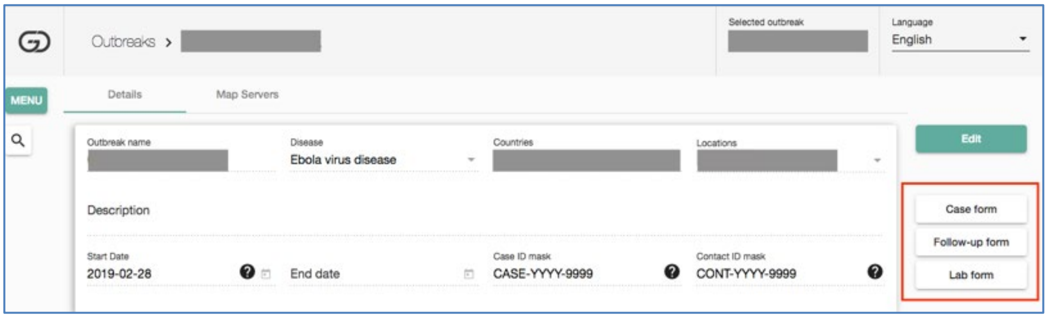
The Map servers tab contains critical data for Go.Data to produce geographical maps of an outbreak. By default, the current version of Go.Data relies on a link with zero or more geographical layers delivered via the internet from an Esri ArcGIS server to map outbreak data.



In addition, the map server functionality allows users to change the underlying map when plotting outbreak data.

Outbreak forms

While investigating an outbreak, you will need to ask questions during case investigation, contact follow-up, and when recording lab results. These questions are likely to vary between outbreaks.



Go.Data contains a flexible questionnaire builder to author data input forms for cases, contacts, and lab results. Using the flexible questionnaire builder, you can create a set of numbered questions that Go.Data will deliver on the case, contact follow-up, and lab screens.

For more information, see Introduction to questionnaire forms.

To view an outbreak

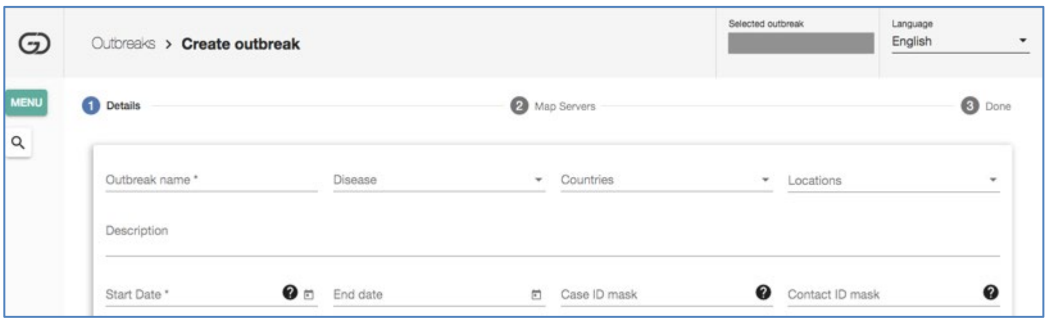
1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **View outbreak** icon.

   Go.Data displays Outbreak details for the selected outbreak.

Adding or modifying outbreaks

You can create an outbreak in Go.Data manually or by using an outbreak template. The outbreak record stores and the details data when investigating an outbreak in Go.Data. Likewise, the outbreak record stores the numerical thresholds used for creating data visualizations in Go.Data and to create content on the dashboard. For more information, see Navigating the Dashboard



In Go.Data, you can set up an outbreak with or without using a template as a starting point.

You can also modify the existing outbreak data for an outbreak. For example, to change an outbreak's active/inactive status.

The add outbreak view includes tabs that must be completed for each outbreak, including:

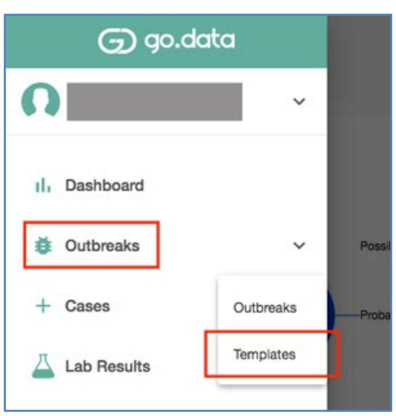
- Details
- Map Servers.

For more information on the fields in the individual outbreak view, see Outbreak details.

Setting up outbreaks using a template

Go.Data contains outbreak templates for common diseases, including the Ebola virus disease and Middle East respiratory syndrome coronavirus (MERS-CoV).

Using an outbreak template, you can quickly add an outbreak to Go.Data with the relevant outbreak details and forms already completed.



For more information about working with outbreak templates, including adding and modifying outbreak templates, see Working with outbreak templates.

To set up an outbreak using a template

1. Select **Menu > Outbreaks > Templates**.

   Go.Data displays the Outbreak templates list.
2. Hover over an outbreak template and click the **Generate outbreak** icon.

   Go.Data displays the Outbreak details tab.
3. Complete the **Details** fields.

   - **Outbreak name:** Enter the name of a specific outbreak for identification and tracking in Go.Data. Required.
   - **Disease:** Enter the disease, if known, that is the subject of the outbreak.
   - **Countries:** Select one or more countries where the outbreak has been located.
   - **Locations:** Choose the location of the outbreak. Depending on the Location Geographical Level, you can drill down to different geographic levels, for example, Country, Region, Town, Neighbourhood.
   - **Description:** Enter information regarding the significance of the outbreak.
   - **Start date:** Choose the known or approximate start date of the outbreak. Required.
   - **End date:** Choose the known or approximate end date of the outbreak.
   - **Case ID mask**: Enter a human-readable identification pattern that Go.Data will use to create a globally unique identifier to track each case. Subject to the structure of the ID, Go.Data automatically assigns an identification number in numerical order when a user creates a case in the outbreak. Required.
   - **Contact ID mask:** Enter a human-readable identification pattern that Go.Data will use to create a globally unique identifier to track each contact. Subject to the structure of the ID, Go.Data automatically assigns an identification number in numerical order when a user creates a contact in the outbreak. Required.
   - **Duration for the follow-up (day):** Choose the number of days that you should follow-up with a case after the date of exposure. Go.Data uses this critical data to generate follow-ups and determine when the follow-up period should end. Required.
   - **Follow-up frequency per day:** Choose the number of follow-ups that Go.Data should generate per day for a contact. The number you enter in this field must be greater than 1. Required.
   - **Days among known contacts:** Choose the default number of past days to consider when counting new cases that came from known contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Days in known transmission chains:** Choose the default of past days to consider when counting new cases added to an existing transmission chain. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Days not seen:** Choose the threshold for counting contacts who have not been seen for a specified number of consecutive days. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Less than X contacts:** Choose the figure sets the threshold for the number of contacts to search for when identifying cases with less than the specified number of contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Long periods (days):** If two cases are linked together but their respective dates of onset are greater than this value, Go.Data will flag these cases as an "unusually long period." This figure is used to determine unlikely transmissions where a user most likely failed to record an intermediate step. Required.
   - **Number of days new contact:** Choose the threshold for counting the number of new contact reported for a specified number of previous days. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Location Geographical Level:** Choose the geographical level Go.Data uses when displaying a breakdown of cases by geographical location. For example, selecting Admin 1 for this field would calculate this count of cases by country. Required.

4. Click the **Next** button.
5. Complete the **Map Servers** fields.

   - **Map name:** Enter a name for this layer of map information or leave blank to use WHO's background map layer.
   - **Map URL:** Enter the web address of the REST service for this layer of map information or leave blank to use WHO's background map layer.
   - **Add item:** Click this text to add a map server to the outbreak.

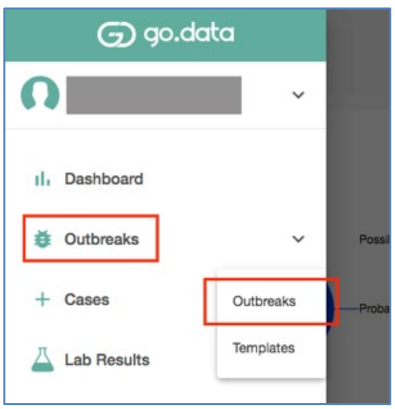
6. Click the **Next** button.

   Go.Data displays a data entry completed message.
7. Click the **Create outbreak** button.

   Go.Data displays an outbreak created message and displays the Modify outbreak screen.

Setting up outbreaks without a template

In situations where you need to create an outbreak not starting from a template or if there is not an existing outbreak template for the disease you are documenting, you can set up an outbreak manually.



To set up an outbreak without a template

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Click the **Add+** button.

   Go.Data displays the Outbreak Details tab.
3. Complete the **Details** fields.

   - **Outbreak name:** Enter the name a specific outbreak for identification and tracking in Go.Data. Required.
   - **Disease:** Enter the disease, if known, that is the subject of the outbreak.
   - **Countries:** Select one or more countries where the outbreak has been located.
   - **Locations:** Choose the location of the outbreak. Depending on the Location Geographical Level, you can drill down to different geographic levels, for example, Country, Region, Town, Neighbourhood.
   - **Description:** Enter information regarding the significance of the outbreak.
   - **Start date:** Choose the known or approximate start date of the outbreak. Required.
   - **End date:** Choose the known or approximate end date of the outbreak.

- **Case ID mask**: Enter a human-readable identification pattern that Go.Data will use to create a globally unique identifier to track each case. Subject to the structure of the ID, Go.Data automatically assigns an identification number in numerical order when a user creates a case in the outbreak. Required.
- **Contact ID mask:** Enter a human-readable identification pattern that Go.Data will use to create a globally unique identifier to track each contact. Subject to the structure of the ID, Go.Data automatically assigns an identification number in numerical order when a user creates a contact in the outbreak. Required.
- **Duration for the follow-up (day):** Choose the number of days that you should follow-up with a case after the date of exposure. Go.Data uses this critical data to generate follow-ups and determine when the follow-up period should end. Required.
- **Follow-up frequency per day:** Choose the number of follow-ups that Go.Data should generate per day for a contact. The number you enter in this field must be greater than 1. Required.
- **Days among known contacts:** Choose the default number of past days to consider when counting new cases that came from known contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Days in known transmission chains:** Choose the default of past days to consider when counting new cases added to an existing transmission chain. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Days not seen:** Choose the threshold for counting contacts who have not been seen for a specified number of days. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Less than X contacts:** Choose the figure sets the threshold for the number of contacts to search for when identifying cases with less than the specified number of contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Long periods (days):** If two cases are linked together but their respective dates of onset are greater than this value, Go.Data will flag these cases as an “unusually long period.” This figure is used to determine unlikely transmissions where a user most likely failed to record an intermediate step. Required.
- **Number of days new contact:** Choose the threshold for counting the number of new contact reported for a specified number of previous days. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Location Geographical Level:** Choose the geographical level Go.Data uses when displaying a breakdown of cases by geographical location. For example, selecting Admin 1 for this field would calculate this count of cases by country. Required.

4. Click the **Next** button.
5. Complete the **Map Servers** fields.

- **Map name:** Enter a name for this layer of map information or leave blank to use WHO’s background map layer.
- **Map URL:** Enter the web address of the REST service for this layer of map information or leave blank to use WHO’s background map layer.
- **Add item:** Click this text to add a map server to the outbreak.

6. Click the **Next** button.

   Go.Data displays a data entry completed message.

7. Click the **Create outbreak** button.

   Go.Data displays an outbreak created message and displays the Modify outbreak screen.

Modifying outbreaks

Go.Data allows you to edit the data for an existing outbreak. For example, you may need to modify an outbreak to change the active/inactive status or change the disease being investigated.

To modify an outbreak

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **Modify outbreak** icon.

   Go.Data displays the Outbreak Details tab.
3. Make changes to the **Details** and/or **Map Servers** tabs.
4. Click the **Save** button.

   Go.Data displays a confirmation message.

Deleting outbreaks

Subject to your user permissions, you will be able to delete an outbreak. When you delete an outbreak from Go.Data you will no longer be able to track the outbreak's data or create visualizations for the specific outbreak. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

NOTE	You cannot delete the active outbreak. If you attempt to delete the active outbreak, Go.Data displays the **Something went wrong. There will be more information in the Go.Data log files and you can contact an administrator for help** message.

To delete an outbreak from Go.Data

1. Select **Menu > Outbreaks > Outbreaks**.

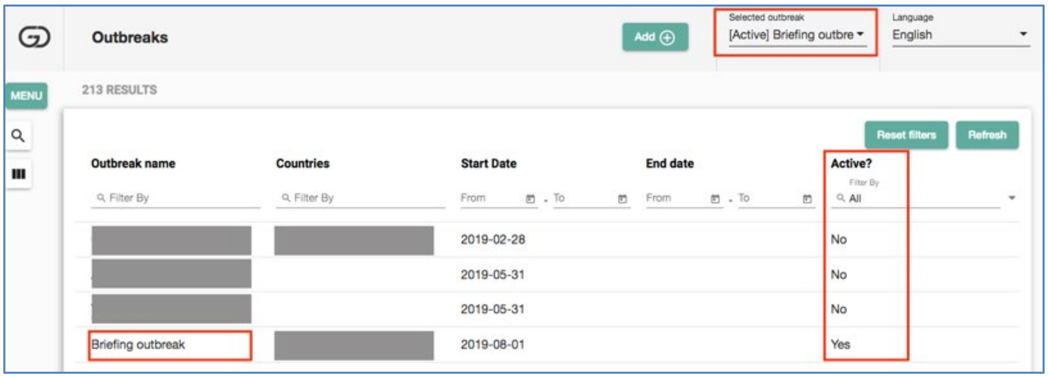
   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **Options** icon.
3. Select **Delete outbreak**.

   Go.Data displays the **Are you sure you want to delete the outbreak?** message.
4. Click **YES**.

   Go.Data deletes the outbreak and displays a confirmation message.

Activating or inactivating outbreaks

Go.Data can store and display data for multiple outbreaks, but only one outbreak can be **Active** in the system at a given time. The active outbreak is set at the user level. This process allows multiple users to work on the same instance of Go.Data but work on different outbreaks.



Viewing the active outbreak

You can view data for any outbreak in Go.Data by using the Selected outbreak dropdown; however, you will only be able to add or modify data for the outbreak that is **Active**.

NOTE	The active outbreak appears in the Selected outbreak dropdown with the **[Active]** prefix.

To determine the active outbreak in Go.Data

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Click the filter in the **Active?** column and select **Yes**.

   Go.Data displays the active outbreak.

Changing the active outbreak

Your assignment may require you to work on multiple outbreaks simultaneously. You will only be able to add, modify, and delete data for the outbreak that is active in Go.Data. This will require you to change the active outbreak in Go.Data.

To change the active outbreak

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **Set active** icon.

   Go.Data displays the **Are you sure you want to set this outbreak to be active?** screen.

3. Click **YES**.

   Go.Data displays a confirmation message.

NOTE	After you select a new active outbreak, you will need to select the outbreak from the **Selected outbreak** drop-down menu to view and edit data for the newly active outbreak. The active outbreak will be prefixed with **[ACTIVE]** in the drop-down menu. For more information, see Introduction to outbreaks.

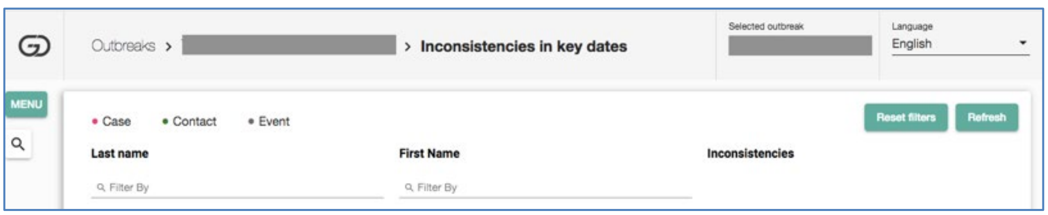
Viewing outbreak inconsistencies

Go.Data can determine inconsistencies in data based on the thresholds you define in the outbreak's **Details** tab. Outbreak inconsistencies include information such as, **"Date of onset" is later than "Date of becoming a case"**.

NOTE	The Outbreak inconsistencies list displays records based on internal calculations by Go.Data. You should verify that an actual inconsistency exists before making changes.

Outbreak inconsistencies list

The Outbreak inconsistencies list provides a single location to view all data inconsistencies that exist for a specific outbreak. From the Outbreak inconsistencies list, you can view the case, contact, or event Go.Data believes has a data inconsistency.



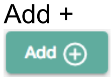
By default, the Outbreak inconsistencies list displays all data inconsistencies for the active outbreak. You can use filters to view more specific or related data inconsistencies. Using the icons, you can view the affected record or modify the record.

This list uses standard functionality as defined in Working with lists.

Outbreak inconsistencies list field definitions

Item	Description
First name	The given name of the individual
Inconsistencies	Displays the suspected data inconsistency type for the case, contact, or event.
Last name	The family name of the individual.

Outbreak inconsistencies list actions

Item	Description
Add + 	This button allows you to add a new contact.
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more contacts

Item	Description
	that you select by clicking the check box to the left of each contact.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a contact selected.
Modify	This hover action opens the contact selected so you may update the information.
View	This hover action opens the contact selected so you may view the information.

To view outbreak inconsistencies

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **Options** icon.
3. Select **View inconsistencies**.

   Go.Data displays the Outbreak inconsistencies list.

Cloning outbreaks

While working in Go.Data you may need to generate a new outbreak that is the same or very similar to an existing outbreak. Go.Data has the functionality to create an identical copy of an existing outbreak, including:

- Details
- Map servers
- Case form
- Follow-up form
- Lab form.

For more information on the outbreaks fields, see Outbreak details.

To clone an outbreak

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over an outbreak and click the **Options** icon.
3. Select **Clone outbreak**.

   Go.Data displays the **Name the clone of the outbreak** screen.
4. Enter the outbreak name in the **Cloned outbreak name** field and click **CLONE**.

   Go.Data displays an outbreak created message and displays Outbreak details.

Working with outbreak templates

Go.Data system administrators have the ability to create outbreak templates. These templates allow users to quickly create new outbreaks for a specific disease or for an unknown disease with identical outbreak details and questionnaire forms.

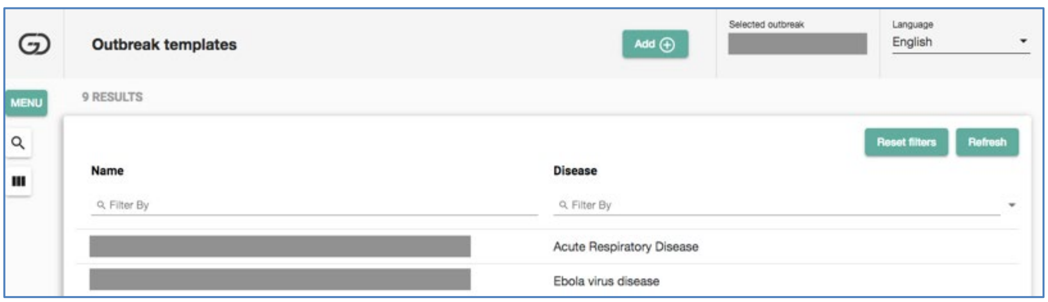
Outbreak templates include data for outbreak details fields, map servers, and questionnaire forms.

- **Outbreak templates list**: a single location to view all outbreak templates in Go.Data.
- **Outbreak template details**: a single location to view the details and questionnaire forms for a specific outbreak template.

Most actions you take concerning outbreak templates start from one of these views. You can use filters to locate and view specific outbreak templates.

Outbreak templates list

The Outbreak templates list provides a single location to view all outbreak templates in Go.Data, view individual outbreak template details, modify existing outbreak templates, create new outbreak templates, and generate an outbreak based on a template.



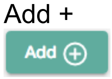
By default, the Outbreak templates list shows all outbreak templates in Go.Data.

This list uses standard functionality as defined in Working with lists.

Outbreak templates list field definitions

Item	Description
Disease	If known, the disease that is the subject of the outbreak.
Name	The name of the outbreak template in Go.Data.

Outbreak templates list actions

Item	Description
Add + 	This button allows you to add a new template.

Item	Description
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a template selected.
Generate outbreak	This hover action creates a new outbreak based on the template selected.
Modify outbreak template	This hover action opens the template selected so you may update the template information.
View outbreak template	This hover action opens the template selected so you may view the template information.

To view all outbreak templates

1. Select **Menu > Outbreaks > Templates**.

   Go.Data displays the Outbreak templates list.

Outbreak template details

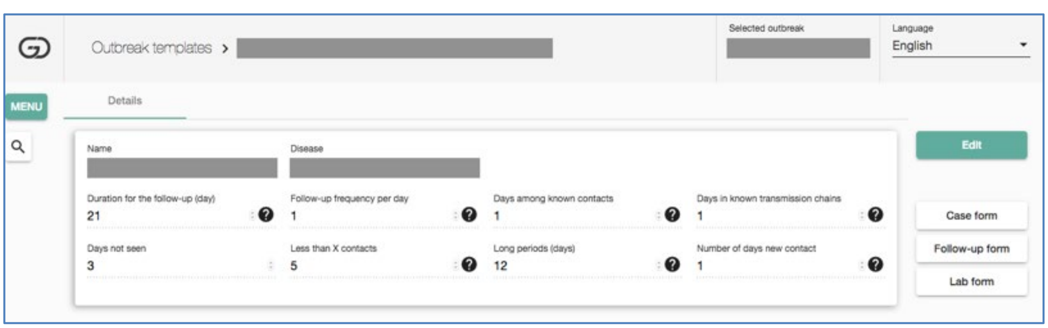
Viewing an individual outbreak template allows you to review the recorded details for the outbreak template. In addition, you can complete actions related to an outbreak template, such as modify an outbreak template and modify questionnaire forms.

Outbreak template details includes information on the Details tab and the Case form, Follow-up form, and Lab form detail views.

For more information on case, follow-up, and lab results forms, see Introduction to questionnaire forms.

Details tab

The details tab contains the core information for an outbreak template. From this tab you can view an outbreak's name, disease under investigation, and critical Go.Data behaviour fields.



To view an individual outbreak template

1. Select **Menu > Outbreaks > Templates.**

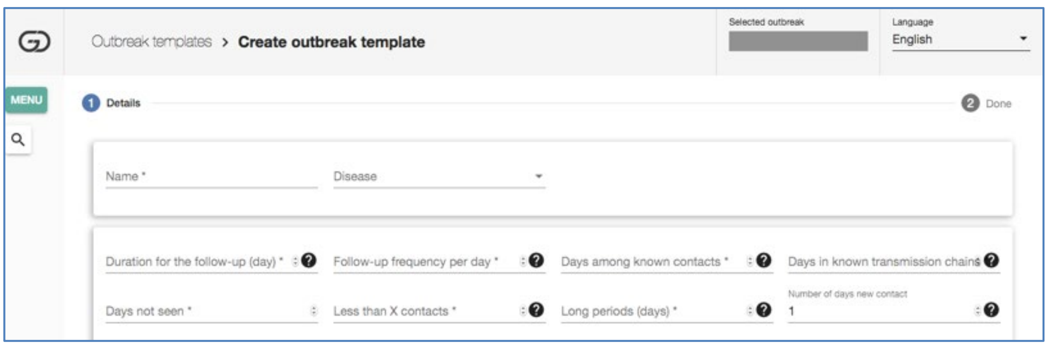
   Go.Data displays the Outbreak templates list.
2. Hover over an outbreak template and click the **View outbreak template** icon.

   Go.Data displays Outbreak template details.

Adding or modifying outbreak templates

Go.Data contains outbreak templates for a number of common diseases involving human-to-human transmission and a generic **unknown disease** template. When creating a new outbreak, an administrator can begin working from a template, then modify the data to accommodate the data of a specific outbreak.

Administrators can also create new templates in Go.Data as an investigation may require.



For more information on the fields in the Individual outbreak template view, see Outbreak template details.

To add or modify an outbreak template

1. Select **Menu > Outbreaks > Templates.**

   Go.Data displays the Outbreak templates list.
2. Click the **Add** button to create a new outbreak template, or hover over an outbreak template and click the **Modify outbreak template** icon to edit an existing outbreak template.
3. Complete the **Details** fields.

   - **Name:** Enter the name of the outbreak template in Go.Data. Required.
   - **Disease:** Enter the disease, if known, that is the subject of the outbreak.
   - **Duration for the follow-up (day):** Choose the number of days that you should follow-up with a case after the date of exposure. Go.Data uses this critical data to generate follow-ups and determine when the follow-up period should end. Required.
   - **Follow-up frequency per day:** Choose the number of follow-ups that Go.Data should generate per day for a contact. The number you enter in this field must be greater than 1. Required.
   - **Days among known contacts:** Choose the default number of past days to consider when counting new cases that came from known contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
   - **Days in known transmission chains:** Choose the default of past days to consider when counting new cases that came from a transmission chain. This figure is used to visualize data on the Go.Data dashboard. Required.

- **Days not seen:** Choose the threshold for counting contacts who have not been seen for a specified number of days. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Less than X contacts:** Choose the figure sets the threshold for the number of contacts to search for when identifying cases with less than the specified number of contacts. This figure is used to visualize data on the Go.Data dashboard. Required.
- **Long periods (days):** If two cases are linked together but their respective dates of onset are greater than this value, Go.Data will flag these cases as an “unusually long period.” This figure is used to determine unlikely transmissions where a user most likely failed to record an intermediate step. Required.
- **Number of days new contact:** Choose the threshold for counting the number of new contact reported for a specified number of previous days. This figure is used to visualize data on the Go.Data dashboard. Required.

4. Click the **Next** button.

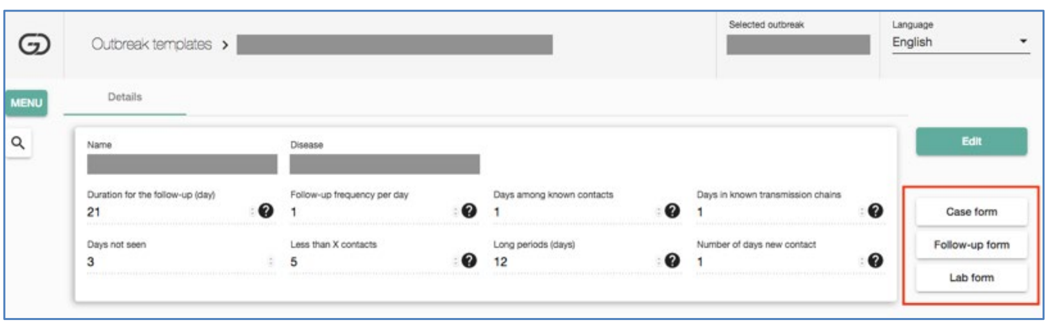
   Go.Data displays a data entry completed message.

5. Click the **Create outbreak template** button.

   Go.Data displays an outbreak template created message and displays the Modify outbreak template screen.

Adding forms to an outbreak template

Case investigation, contact follow-up, and lab results forms are critical for tracking and documenting outbreaks in Go.Data.



System administrators can add questionnaire forms to an outbreak template to reduce the amount of time it takes to configure an outbreak in Go.Data.

Due to the specific nature of these forms as they relate to an outbreak, questionnaire forms can be resource intensive to construct.

For more information related to outbreak questionnaire forms, see Introduction to questionnaire forms.

To add forms to an outbreak template

1. Select **Menu > Outbreaks > Templates**.

   Go.Data displays the Outbreak templates list.

2. Hover over an outbreak template and select the **Modify outbreak template** icon.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the relative questionnaire form builder.
4. Add questions as directed in Adding and modifying questions.

Deleting outbreak templates

Subject to your user permissions, you will be able to delete an outbreak template. When you delete an outbreak template from Go.Data, you will no longer be able to generate new outbreaks based on that specific template.

To delete an outbreak template

1. Select **Menu > Outbreaks > Templates**.

   Go.Data displays the Outbreak templates list.
2. Hover over an outbreak template and click the **Options** icon.
3. Select **Delete outbreak template**.

   Go.Data displays the **Are you sure you want to delete the outbreak template** message.
4. Click **YES**.

   Go.Data displays the outbreak template deleted message and displays the Outbreak templates list.

Chapter 7 – Using questionnaire builder

In addition to using Go.Data to record and store individual data as it relates to cases, contacts, and lab results, you can create questionnaire forms to conduct interview-style field research. The questionnaire form builder allows you to create standardized follow-up forms for an outbreak. Furthermore, this functionality allows you to extend the variables collected through the minimum dataset.

Go.Data allows you to create the following questionnaire forms:

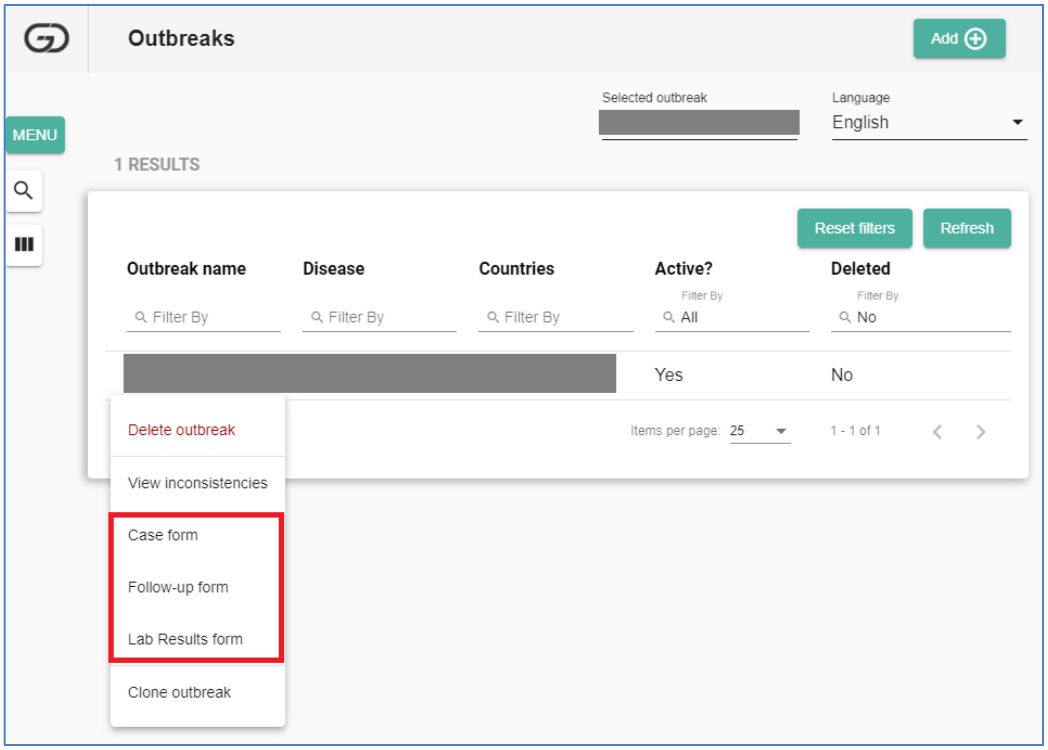
- case investigation
- contact follow-up
- lab results.

Using the questionnaire form builder, you can create individual questions and hierarchical, nested questions. Additionally, you can modify existing questions, position questions, clone questions, and delete questions.

You access the questionnaire form builder for all forms through the Outbreaks feature in Go.Data.

Chapter Contents

Introduction to questionnaire forms



Questionnaires are essential for collecting and recording data for cases, contacts, and lab results during an outbreak. A pre-established questionnaire format for an outbreak ensures that data collected is consistent across the outbreak, so you can more easily perform analysis on the information.

Depending on your user permissions, you can create questionnaire forms with the flexible questionnaire builder at any time. This tool is located at the outbreak or outbreak template level of Go.Data. For additional information on accessing the questionnaire builder, contact the system administrator.

You can use the questionnaire builder to add your predefined questions to any outbreak, regardless of the outbreak selected and active. Only the outbreak to which you add the questions, however, will display the questions on the Questionnaire tab.

After you have set up the case investigation, contact follow-up, and lab results questionnaire forms, Go.Data users responsible for collecting data will be able to record answers to the form's standardized questions while entering case, contact follow-up, and lab results data.

Questionnaire forms builder

Using the questionnaire form builder, you control the variables collected, the data type of the expected answer, and the internal variable name. The format of internal variable names can be critical in outbreaks if the data needs to be compatible with other software. The variable names are used in several ways throughout the outbreak.

Go.Data contains three types of questionnaire forms:

- case investigation
- contact follow-up
- lab results.

You use these forms to collect and record data for the related feature. For example, you use the case investigation form to record specific data as it relates to a case.

While the three forms individually contain unique data, the questionnaire form builder functionality is the same for creating all three forms.

For more information on cases, contacts, and lab results, see Introduction to cases, Introduction to contacts, and Introduction to lab results respectively.

Questionnaire form field definitions

Item	Description
Position	The position of the question on the form. For example, Q1, Q2, or Q3.
Question	The written question that appears on the questionnaire form.
Answer type	The format required for entering the answer. Available fields include freetext, multiple answers, single answer, numeric, file upload, markup, and date/time.
Variable	The internal name of the field in Go.Data.
Category	The category of the question selected from a drop-down list. Users with system administrator rights can edit the categories available in the drop-down menu by navigating to **Menu > Reference Data > Question category > View category**.
Answers display	Denotes if Go.Data displays the answers in a vertical column or horizontal row.
Inactive?	Displays **Yes** if the question appears on the active questionnaire form. Displays **No** if the question is hidden on the active questionnaire form
Required?	Displays **Yes** if an answer is required to complete the questionnaire form. Displays **No** if users can complete the questionnaire form without answering the question.
Multi answer	Displays **Yes** if multiple answers are allowed for the question. Displays **No** if only one answer is allowed for the question.

Questionnaire form actions

Item	Description
Add question	This button allows you to add a new question to the questionnaire form.
Add question arrow	This drop-down menu button allows you to add a question to a specific position: • **Add Question Top**. Adds a new question to the top position. • **Add Question no**. Adds a new question to a specified position. • **Add Question Bottom**. Adds a new question to the bottom position.
Options (Ellipsis menu)	This hover action opens a menu for choosing additional actions related to the questionnaire form.
Move down	This hover action moves the question down one position on the questionnaire form.
Move up	This hover action moves the question up one position on the questionnaire form.
Modify question	This hover action allows you to edit an existing question.

To access the questionnaire form

1. Select **Menu > Outbreaks > Outbreaks.**

   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click one of these buttons:

   - **Case form**
   - **Follow-up form**
   - **Lab form**.

Go.Data opens the selected questionnaire form.

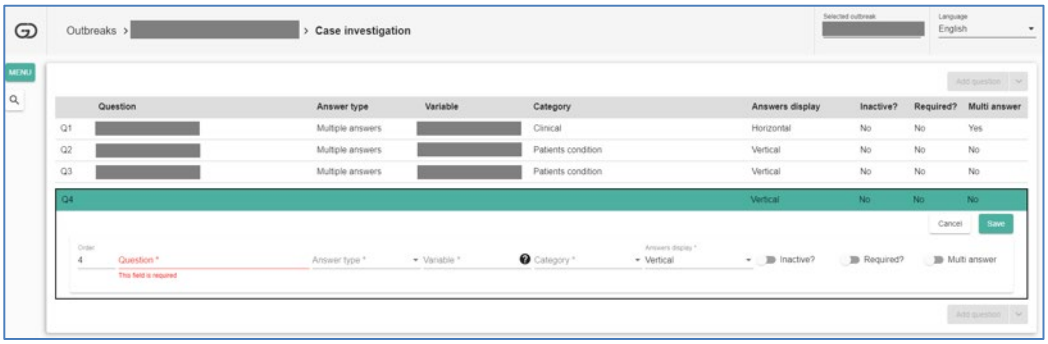
NOTE	You can also go directly to the case form, follow-up form, and lab form from the Options context menu. Hover over an outbreak for which you want to view a form and from the **Options** icon, click **Case form, Follow-up from, or Lab results form**.

Adding and modifying questions

After you open the questionnaire builder, you can add questions to the case investigation, contact follow-up, or lab results forms. The questions you add in questionnaire builder for a form are displayed for users in the format and order you specify for that form.

You can add or modify questions at any time.

If you add or modify questions in the questionnaire builder after a case, contact follow-up, or lab results record was added, users working in the outbreak can update the record to provide the requested information.



Adding individual questions

Go.Data allows you to create the following types of questions, based on the type of information that Go.Data users are responsible for recording during an outbreak.

- **Date/Time:** The Go.Data user collects a year, month, day, and/or time.
- **File upload:** The Go.Data user uploads a file to Go.Data as the collected response to a question.
- **Freetext:** The Go.Data user may collect and enter any value in the field.
- **Markup:** The Go.Data user can add additional explanation or instructions on how to complete specific part of the questionnaire.
- **Multiple answers:** The Go.Data user collecting data selects from multiple predetermined answers.
- **Numeric:** The Go.Data user collects and enters numerical values in a field.
- **Single answer:** The Go.Data user collecting data selects one predetermined answer. For example, Yes, No, or Unknown.

By default, when you click the **Add question** button, you add an individual question at the bottom position of the questionnaire. Using the **Add question** arrow button, however, you can add a question to a specific position in the questionnaire form.

- **Add Question Top:** Adds a new question to the first row of the questionnaire form.
- **Add Question no.:** Adds a new question to a specified row of the questionnaire form.
- **Add Question Bottom:** Adds a new question as the last row of the questionnaire form.

NOTE	Go.Data automatically generates variable names; however, you can overwrite the variable to match your preferred format. Your variable name must be unique for this questionnaire and can only be edited when you add the variable.

To add or modify an individual question with a date/time, file upload, freetext, markup, or numeric format

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Do one of the following:

   - To add a question to the default position at the bottom, click the **Add question** button.
   - To add a question and choose the position, click the **Add question drop-down arrow** and choose **Add Question Top**, **Add Question no**, or **Add Question Bottom**.
   - To modify a question that already exists, hover over a question and click the **Modify question** icon.

   Go.Data displays the question fields.
5. Complete the question fields:

   - **Order**. Enter a number to determine the position of the question in the questionnaire form. For example, order 1 indicates the question will be first, and order 2 indicates the question will be placed second.
   - **Question**. Enter the text to be displayed for the question you are adding to the questionnaire form. Required.
   - **Answer type**. Select an answer type from the drop-down list.
   - **Date/Time**: The user enters a year, month, day, and time.
   - **File upload**: The user uploads a file to Go.Data as the response to a question.
   - **Freetext**: The user may enter any value in a field.
   - **Markup**: The user can add text to the Clinical Information field below the questionnaire.
   - **Numeric**: The user enters numerical values in a field.
   - **Variable**: The internal name of the field in Go.Data. This item is the name of the field that appears when you export the data from Go.Data. Enter a new variable name to change the variable automatically generated by Go.Data. You cannot edit the variable name after you save the question. Required.
   - **Category**: Select a question category from the drop-down list. Categories are defined in Introduction to reference data. Required.
   - **Answers display**: Choose if Go.Data displays the answers in a vertical column or horizontal row. Required.
   - **Inactive**: Select this toggle to hide the question on the active questionnaire form.
   - **Required**: Select this toggle to require the user to answer the question to complete the questionnaire form.
   - **Multi answer**: Select the toggle to allow the user to input multiple answers.
6. Click the **Save** button.

   Go.Data adds the question to the questionnaire.

To add or modify an individual question with a single answer or multiple answer format

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.

2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Do one of the following:

   - To add a question to the default position at the bottom, click the **Add question** button.
   - To add a question and choose the position, click the **Add question drop-down arrow** and choose **Add Question Top**, **Add Question no**, or **Add Question Bottom**.
   - To modify a question that already exists, hover over a question and click the **Modify question** icon.

   Go.Data displays the question fields.
5. Complete the question fields:

   - **Order**: Enter a number to determine the position of the question in the questionnaire form. For example, order 1 indicates the question will be first, and order 2 indicates the question will be placed second.
   - **Question**: Enter the text that to be displayed for the question you are adding to the questionnaire form. Required.
   - **Answer type**: Select an answer type from the drop-down list.
   - **Multiple answers:** The user selects from multiple predetermined answers.
   - **Single answer:** The user selects one predetermined answer.
   - **Variable**: The internal name of the field in Go.Data. This item is the name of the field that appears when you export the data from Go.Data. Enter a new variable name to change the variable automatically generated by Go.Data. You cannot edit the variable name after you save the question. Required.
   - **Category**: Select a question category from the drop-down list. Required.
   - **Answers display**: Choose if Go.Data displays the answers in a vertical column or horizontal row. Required.
   - **Inactive**: Select this toggle to hide the question on the active questionnaire form.
   - **Required**: Select this toggle to require the user to answer the question to complete the questionnaire form.
   - **Multi answer**: Select the toggle to allow the user to input multiple answers.
6. Complete the answer fields:

   - **Order**: Enter a number to determine the position of the answer in the questionnaire form. For example, order 1 indicates the question will be first, and order 2 indicates the question will be placed second.
   - **Answer label**: Enter the text to be displayed for the answer you are adding to the questionnaire form. Required.
   - **Answer value**: Enter the variable for how the answer is stored in Go.Data. Required.
   - **Questions**: Select this toggle to display a follow-up question after the user selects this answer. For more information on nested questions, see Adding nested questions.
   - **Alert**: Select this toggle to create a visual dashboard identifier when a user selects this answer. When selected, the case, contact, or lab results will be bold on the respective dashboard.
7. Click the **Update** button.

   Go.Data adds the answer to the question.

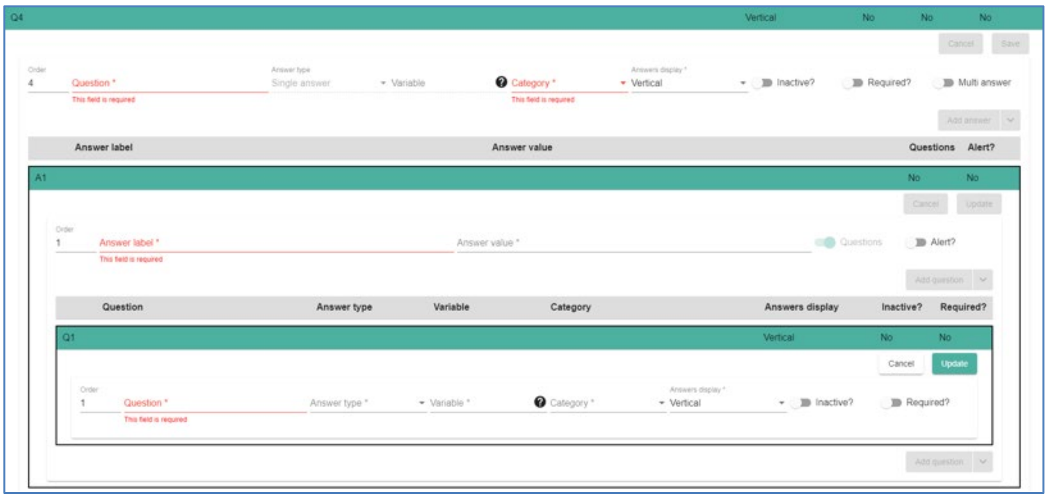
8. To add another answer to the question, click the **Add answer** button or **Add answer drop-down** arrow and repeat steps 6 and 7.
9. Click the **Save** button.

   Go.Data adds the question to the questionnaire.

Adding nested questions

Go.Data's questionnaire form allows you to create hierarchical questions that can be modelled to provide basic logic. For example, you may only want to ask a specific question if the user responds "yes" to a specific question.

You can only create nested questions for single answer or multi-answer types of questions.



Before you create nested questions, you must meet the following requirements:

- You must have an existing **Single answer** or **Multiple answers** question in Go.Data.
- The existing **Single answer** or **Multiple answers** question must have at least one answer.

To create a nested question

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Hover over the question to which you would like to add logic and click the **Modify question** icon.

   Go.Data displays the question fields.
5. Hover over the answer which you would like to trigger a new question and click the **Modify answer** icon.

   Go.Data displays the answer fields.

6. Click the **Questions** toggle.
7. Do one of the following:
    - To add a question to the default position at the bottom, click the **Add question** button.
    - To add a question and choose the position, click the **Add question drop-down arrow** and choose **Add Question Top**, **Add Question no**, or **Add Question Bottom**.
    - To modify a question that already exists, hover over a question and click the **Modify question** icon.

    Go.Data displays the question fields.
8. Complete the question fields as detailed in Adding individual questions.

Positioning questions

In Go.Data, you can change the order of the questions on a form. There are two methods for changing the positions of questions:

- Provide a specific position number.
- Use the **Move up** and **Move down** icons.

To move a question to a specific position

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Hover over the question you want to reposition and click the **Options** icon.
5. Select **Move To no**.

   Go.Data displays the enter question position message.
6. Enter the question's new position in the **Position** field.
7. Click **Change**.

   Go.Data moves the question to the new position.

To move a question up or down one position at a time

1. Select **Menu > Outbreaks > Outbreaks**.

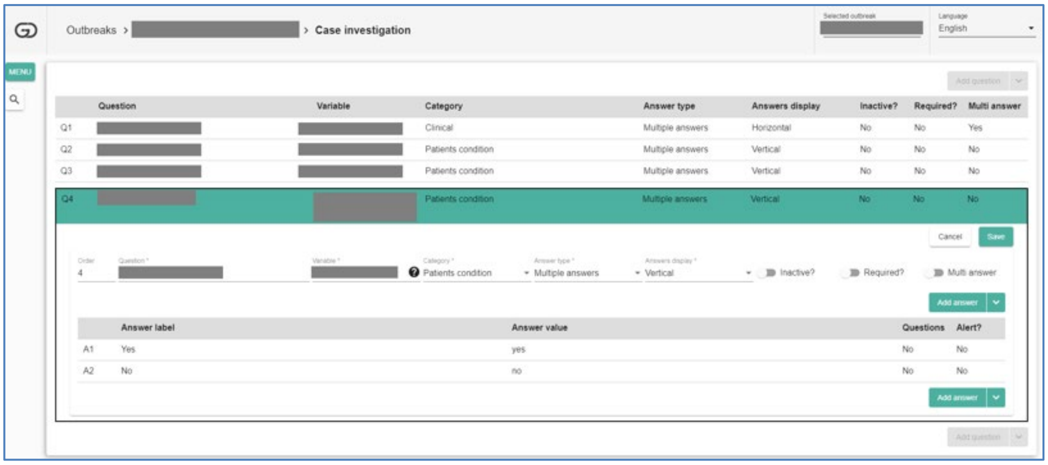
   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Hover over the question you want to reposition and click the **Move up** and **Move down** icon.

   Go.Data moves the question one position in the direction specified. You may move the question as many times as you like in either direction until you reach the top or bottom of the list.

Cloning questions



To save time when adding a new question to the questionnaire form, you can clone an existing question, preserving the answers and logic. Cloning a question is helpful when adding single-answer questions where the question is different, but the answer choices are the same, for example, Yes, No, or Unknown.

To clone a question

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Hover over the question you want to clone and click the **Options** icon.
5. Click **Clone**.

   Go.Data displayed the cloned question.
6. Complete the question fields as detailed in Adding and modifying questions.

Deleting questions

Subject to your user permissions, you will be able to delete questions. If you delete a question from the questionnaire builder, it will be removed from all historical data.

NOTE	If you wish to preserve questions in the historical data, but do not want the question to appear on the questionnaire form, select the **Inactive** toggle. For more information, see Adding and modifying questions.

To delete a question

1. Select **Menu > Outbreaks > Outbreaks**.

   Go.Data displays the Outbreaks list.
2. Hover over the active outbreak and click the **View outbreak** icon.

   Go.Data displays the Outbreak details.
3. Click the **Case form**, **Follow-up**, or **Lab form** button to open the respective questionnaire form builder.

   Go.Data displays the questionnaire form.
4. Hover over the question you want to delete and click the **Options** icon.
5. Click **Delete**.

   Go.Data displays a delete confirmation message.
6. Click **Yes**.

   Go.Data deletes the question.

Chapter 8 – Managing cases

The Cases feature provides epidemiologists and data managers with tools to manage case data.

A case module tracks the personal, location, and epidemiological information for an individual over time in relation to a specified outbreak. It also tracks the case investigation form and relationships to other cases, contacts, and events.

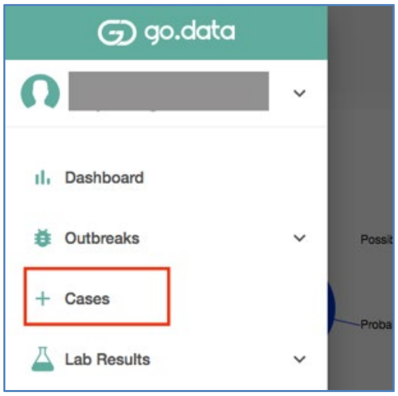
With the Cases feature, you can easily add, modify, or delete cases. You can also establish relationships with other cases, contacts, and events. For example, you can view the relationships a case has with other cases, contacts, or events within Go.Data or share existing relationships between two individuals.

You will also be able to add or edit laboratory results for cases and use the lab questionnaire created for each outbreak.

Cases module also includes visualisations for the case's movement (based on the address history), a timeline of the significant dates in their epidemiological history, and several reports.

Chapter Contents

Introduction to cases



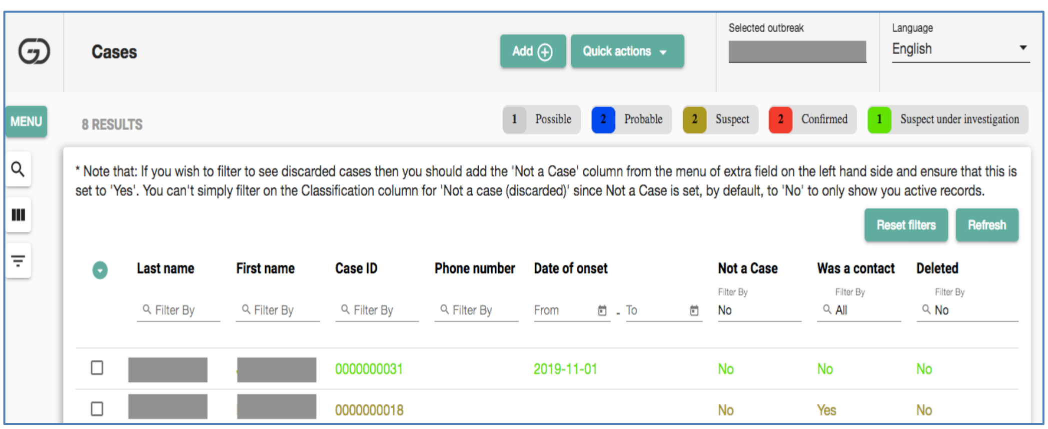
Cases are a core component of Go.Data. Actions on cases start from either the Cases list or the Case details. For example, if you wished to export a dossier of selected cases, you could use the Case list. If you wished to add hospitalization data to a case, you could use the Case details for that particular case.

These views allow you to see case records within a selected outbreak, to initiate actions for cases, to see reports, and to import and export information.

- **Cases list**: a single location to view all case records for a designated outbreak.
- **Case details**: a single location to view the case records for a selected individual in an outbreak.

Cases list

Viewing all cases at one time allows you to review selected personal, location, and other information associated with the case records for a selected outbreak. You also use the Cases list to add new cases, which are then also displayed on the Cases list.



By default, the Cases list shows all active records for a selected outbreak that are classified as cases, whether confirmed, probable, or suspect, and are sorted ascending by last name. You can also access records that have been deemed not to be cases.

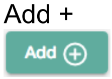
The case classification at the top of the list displays cases grouped, for example, as confirmed, probable, or suspect. Each classification is a button that shows the number of records matching the case classification. The colour of the button matches the colour of the appropriate classification as defined in Reference data. Clicking a button displays the matching records. To return to seeing all cases, click the Reset filters button.

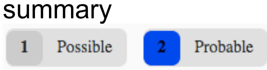
This list uses standard functionality as defined in Working with lists.

Cases list field definitions

Item	Description
Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Area	The general location of the address.
Case ID	The unique identifier of a case.
Classification	Whether the individual is considered a confirmed, probable, or suspect case.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of onset	The date the individual's symptoms began.
Deleted	Yes indicates a Go.Data user has deleted the record. No indicates a Go.Data user has not deleted the record.
First name	The given name of the individual.
Gender	The gender of the individual.
Last name	The family name of the individual.
Not a case	When the individual in the case record is no longer considered a case and has been re-classified as such.
Outcome	The outcome, if known, for the individual.
Phone number	The telephone number associated with the individual.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.
Was a contact	Identifies a case record that was originally a contact.

Cases list actions

Item	Description
Add + 	This button allows you to add a new case.
Quick Actions 	This button opens a menu from which you may choose additional actions related to the cases.

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more cases that you select by clicking the check box to the left of each case.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a case selected.
Modify case	This hover action opens the case selected so you may update the case's information.
View case	This hover action opens the case selected so you may view the case's information.
Case classification summary 	These buttons show the cases grouped visually by case classification. Each button shows the number of cases matching the type, and the colour of the button matches the colour of the appropriate classification as defined in Introduction to reference data.

To view all cases

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.

Case details

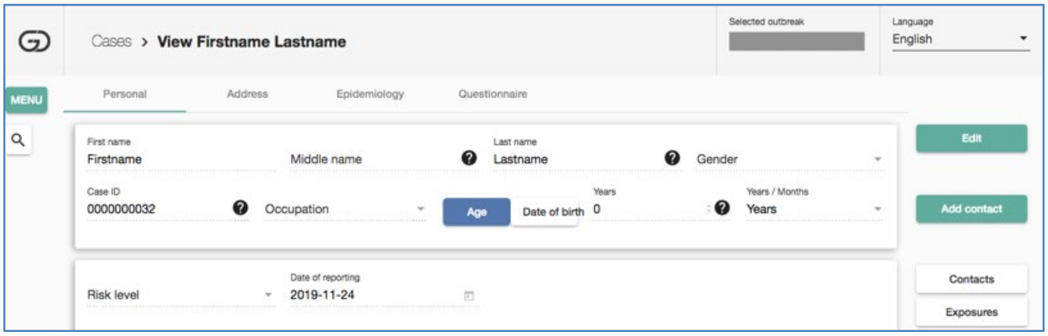
Case details provides one location to view information, such as the personal, location, and epidemiological details, for a single individual for a selected outbreak. In addition, you can do other activities, including initiate actions for the case, add and view contacts, add and view exposures, and see reports.

The information on the Case details is used throughout Go.Data. The information is separated into these tabs:

- Personal
- Address
- Epidemiology
- Questionnaire.

Personal tab

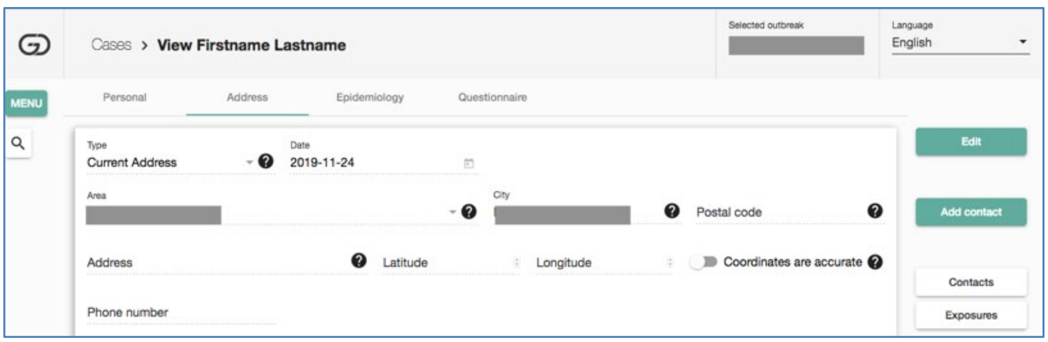
The personal tab includes sections for the individual's personal, risk and reporting, vaccine and personal document information.



Address tab

The address tab includes sections used to locate individuals, including address information. You can add multiple addresses if necessary. Addresses can be street addresses, latitude and longitude, or informal (for example, second house on the left behind the market). The history of addresses and dates are used to create movement maps.

You can add as many address blocks as necessary, but may only have one current address at a time.

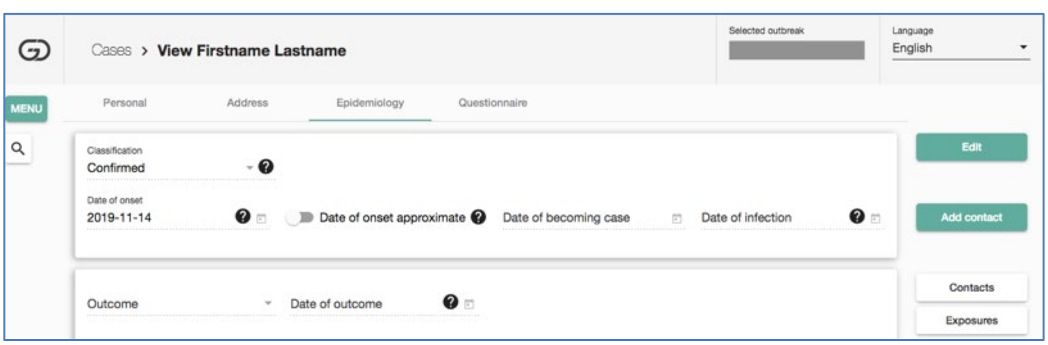


Epidemiology tab

The epidemiology tab includes sections about core epidemiological information for the individual. Information includes case classification, dates for onset of symptoms, and the outcome.

Date of onset is mandatory and must be flagged as approximate if it is calculated on the basis of other information, for example, by date of hospitalization. Date of onset of symptoms is a key date used for generating timelines in the Visualisation of chains of transmission module.

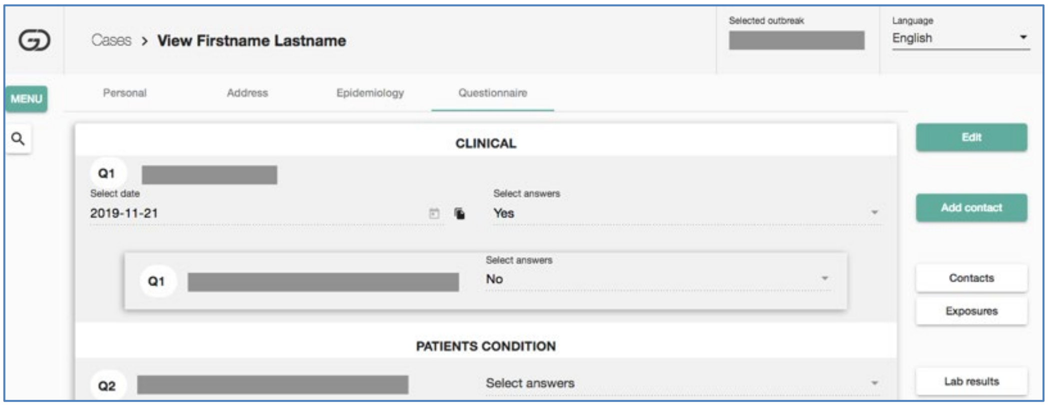
You can also add information related to hospitalizations or isolation related to the individual, including health centre name, location, and dates.



Questionnaire tab

The questionnaire tab includes case investigation form. These questions are relevant to the specific outbreak and either were provided in the original template or established when the identified outbreak was set up in Go.Data.

For more information on responding to questions included on the Questionnaire tab, see Introduction to questionnaire forms.



To view a case

1. Select **Menu > Cases**.

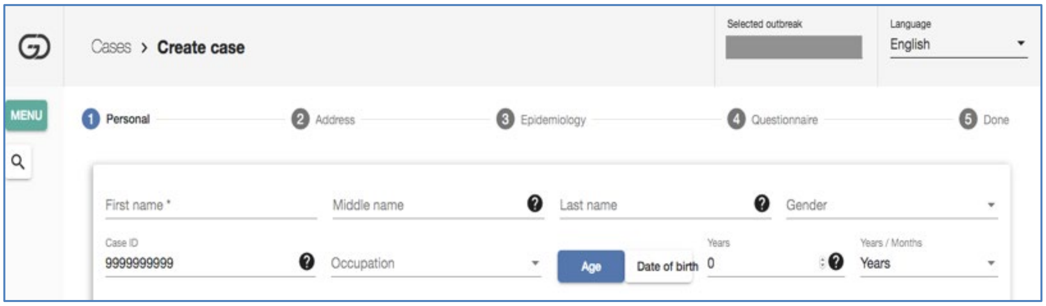
   Go.Data displays the Cases list.

2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.

Adding or modifying cases

You can add cases any time. The selected outbreak to which you are adding the case must be the active outbreak. You can also modify an existing case, for example, if the individual has moved or if there is new information available.



NOTE	If your active outbreak does not match your selected outbreak, a warning message will be displayed in a red box at the top of your screen.

Case details includes tabs that must be completed for new cases or can be modified for existing cases, including:

- Personal
- Address
- Epidemiology
- Questionnaire.

For more information on the fields, see Case details.

For more information on the setting the active outbreak, see Changing the active outbreak.

To add or modify a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. To create a new case, click the **Add+** button. To modify a case that already exists, hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Complete the Personal tab.

   - **First name**: Enter the given name of the individual. Required.
   - **Middle name**: Enter the middle name of the individual.
   - **Last name**: Enter the family name of the individual.
   - **Gender**: Choose the gender of the individual.
   - **Case ID**: Update the unique identifier of a case if necessary.
   - **Occupation**: Choose the individual's field of work.
   - **Age**: Click the **Age** button to the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.

- **Date of birth**: Click the **Date of birth** button to open a **Date of birth** field with a calendar dropdown from which you may select the precise date. Go.Data calculates the individual's age.
- **Years or Months**: Enter the individual's age based on the unit of measure in the **Years/Months** field. For months, you may only enter whole numbers up to 11 for people under 1 year of age.
- **Years/Months**: Choose the unit of measure in years or in months for the individual's age.
- **Risk level**: Choose the risk level.
- **Date of reporting**: Choose the date you first became aware of the individual.
- **Pregnancy status**: Choose an option to reflect whether the case is pregnant.
- **Date of reporting approximate**: Select this toggle if the date of reporting is an estimate.
- **Refused transfer to treatment unit**: Select this toggle if the individual declined to be transferred to a treatment unit.
- **Risk reason**: Enter information about the rationale of your risk assessment.
- **Add another vaccine**: Click this link to open a section in which to add vaccine information related to the individual.
- **Vaccine**: Required if entering vaccine information.
- **Vaccine date**: Choose the date the vaccine was given.
- **Vaccine status**: Required if entering vaccine information.
- **Add another document**: Click this link to open a section in which to add one or more additional personal identification documents related to the individual.
- **Document type**: Choose a document type including national ID cards, passports, and vaccination cards. Required.
- **Document number**: Enter the identification number from the document. Required.

4. Click the **Next** button.
5. Complete the Address tab. If existing address information is available, you can delete the entire address block using the delete icon.

   - **Type**: Choose the status of the address you are reporting. Required. For example, Current Address indicates the individual's primary address. You can have only one current address.
   - **Date**: Enter the date you documented the address.
   - **Area**: Choose the general location of the address. Required.
   - **City**: Enter the city where the address is located.
   - **Postal code**: Enter the postal code of the location where the address is located.
   - **Address**: Enter the first line of the address or description to define the physical location of the address. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.
   - **Latitude and Longitude**: Enter the geographical coordinates where the address is located. If selected location has latitude and longitude data available, these fields will automatically populate.
   - **Coordinates are accurate**: Toggle this option if the geographical coordinates of the address can be accurately used to locate the address, e.g. geocoordinates of the household.
   - **Phone number**: Enter the telephone number associated with the individual.
   - **Add another address**: Click this link to open a section in which to add one or more additional addresses of interest to the entry.

6. Click the **Next** button.
7. Complete the Epidemiology tab.

   - **Classification**: Choose the case classification. Required
   - **Date of onset**: Choose the date on which the individual's symptoms began. Required.
   - **Date of onset approximate**: Select this toggle if the date of onset is estimated.

- **Date of becoming a case**: Choose the date on which the individual's symptoms were confirmed, usually through laboratory confirmation, as being a case.
- **Date of infection**: Choose the date on which the individual was likely to have become infected.
- **Outcome**: Choose the outcome of the individual as related to this outbreak. For example, Loss to follow-up indicates that the individual is no longer available for follow up.
- **Date of outcome**: Choose the date of the final outcome of the individual
- **Hospitalization/Isolation type**: Choose the hospitalization or isolation of the individual. For example, Hospitalization indicates that the individual was hospitalized due to this outbreak.
- **Hospitalization/Isolation dates**: Enter the hospitalization or isolation dates. **From** defines the date the hospitalization or isolation started. **To** defines the date the hospitalization or isolation ended. When entering dates in this section, Go.Data will warn you if the data of onset is after the start date or if the case has been hospitalized for other reasons or conditions.
- **Centre name**: Enter the name of the hospital or isolation center where the individual was treated.
- **Location**: Choose the location of the hospital or isolation center where the individual was treated.
- **Comments**: Enter thoughts or information about the hospital or isolation.
- **Add another date range**: Click this link to open a section in which to add one or more additional entries for other times when the individual stayed in a hospital or in isolation related to this case.

8. Click the **Next** button.
9. Complete the Questionnaire tab and click the **Next** button

   Go.Data displays a data entry completed message.
10. Click the **Create case** button.

   Go.Data displays the Case details, and each tab includes the information provided.

Deleting cases

Subject to your user permissions, you will be able to delete a case. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

WARNING	When you delete a case, you delete all associated contacts if they are not already associated with another case. Either convert the contacts to a case or associate them with another case if you do not want to lose the contacts when you delete the case.

To delete a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Options** icon.
3. Click **Delete case**.

   If the case you are deleting has no contacts or the contacts are all associated with other cases, Go.Data displays a delete confirmation message.

   If the case you are deleting has contacts not associated with other cases, Go.Data displays the "Case: *Case Name* has *x number* exposed contacts that will be deleted. Are you sure you want to delete this case?" message.
4. Click **YES**.

   Go.Data deletes the case and any associated contacts and displays the Case deleted message.

Working with a case’s contacts

Contacts are the people with whom a case has been in association. Sometimes contacts start displaying signs of illness and become a case, and Go.Data provides a feature to switch easily.

Cases may have one or more contacts. Contacts are only relevant when related to a case or an event; therefore, you must add the contact from a case or an event and cannot add new contacts directly from within the Contacts feature.

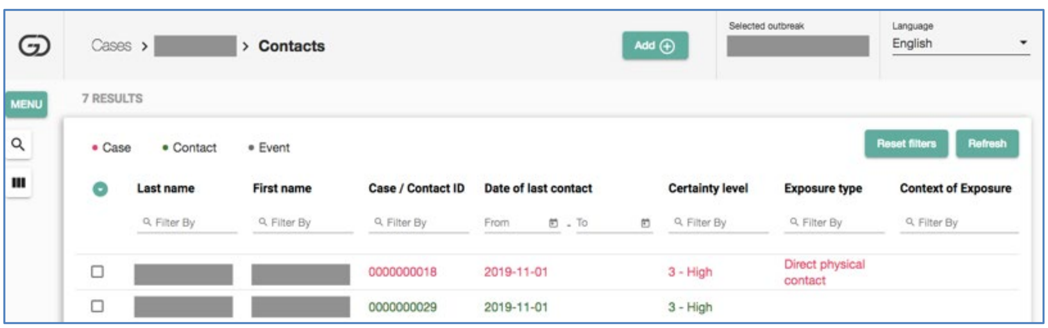
Case’s contacts, either in a line list or individually, is an important part of outbreak management. For example, if you wished to share selected contacts, you could use the Case contacts list. If you wished to modify a contact, you could use the Contact details for that particular contact.

These views allow you to see contact records within a selected outbreak, to initiate actions, to see reports, and to import and export information.

- **Case contacts list**: a single location to view all contact records related to a case.
- **Contact details**: a single location to view the contact records for a selected individual related to a case.

Case contacts list

Viewing all contacts for a case at one time allows you to review selected personal, exposure, and relationship information associated with the contacts for the selected case. You can use the Case contacts list to choose contacts to view more details or to initiate other actions, such as modifying or deleting a relationship.



The Case contacts list provides a single location from which to:

- view contacts for a selected case;
- manage contact relationships by adding, updating, and deleting relationships individually and in bulk;
- convert cases to contacts;
- share selected contacts with other cases; and
- view follow-ups for related contacts.

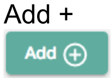
By default, the Case contacts list shows all contacts for a selected case and are sorted ascending by last name.

This list uses standard functionality as defined in Working with lists.

Case contacts list field definitions

Item	Description
Case/Contact ID	The unique identifier of a case or contact.
Certainty level	The confidence level that the individual or event was exposed at the time of the contact you are documenting.
Cluster	The specific cluster to which the contact belongs.
Context of Exposure	The type of relationship between the case and contact that you are documenting.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure.
Exposure duration	The length of time the exposure continuously occurred.
Exposure frequency	The numerical count of how often the exposure type occurred.
Exposure type	The description of how the case, contact, or event could have been exposed to the outbreak.
First name	The given name of the individual in the case or contact.
Last name	The family name of the individual in the case or contact.
Relation detail	The relationship between the contact and a case or event that you are documenting.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Case contacts list actions

Item	Description
Add + 	This button allows you to add a new contact for a case.
Bulk Actions 	The dropdown arrow opens a menu from which you may choose additional actions related to one or more contacts that you select by clicking the check box to the left of each contact.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to a contact selected.
Modify relationship 	This hover action opens the contact selected so you may update the relationship information.

Item	Description
View relationship	This hover action opens the contact selected so you may view the relationship information.

To view all contacts for a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.
3. Click the **Contacts** button.

   Go.Data displays the Case contacts list with the currently associated cases, contacts, or events.

NOTE	You can also go directly to the Case contacts list for an individual case from the Options context menu. Hover over a case for which you want to view the contacts and from the **Options** icon, click **See contacts**.

Case contact details

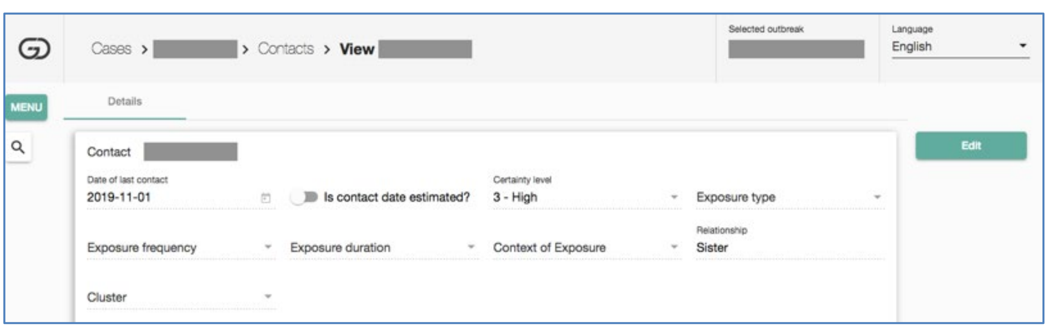
Contact details provides one location to view or edit information, such as exposure and relationship, for a single contact for a selected case. You can also click the hyperlinked name and see the full information. The information on the Contact details is used throughout Go.Data.

The information is found on the Details tab.

For more information, see Introduction to contacts

Details tab

The details tab includes fields for determining how a contact is related to a case.



To view an individual contact for a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

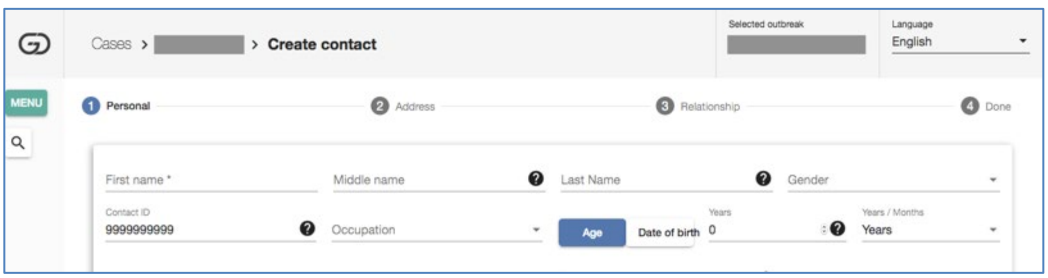
   Go.Data displays the Case details.
3. Click the **Contacts** button.

   Go.Data displays the Case contacts list with currently associated cases, contacts, and events.
4. Hover over a contact and click the **Options** icon.
5. Click **View relationship**.

   Go.Data displays the Individual contact relationship details.

Adding contacts and creating case contact relationships

You can add a new contact and simultaneously relate the contact to an existing case.



To add a contact to an existing case, you must complete the Individual contact details including information on these tabs:

- Personal
- Address
- Relationship.

To add a new contact with a relationship to an existing case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case to which to add the new contact and click the **Options** icon.
3. Click **Add contact**.
4. Complete the Personal tab.

   - **First name**: Enter the given name of the individual. Required.
   - **Middle name**: Enter the middle name of the individual.
   - **Last name**: Enter the family name of the individual.
   - **Gender**: Choose the gender of the individual.
   - **Contact ID**: Update the unique identifier created to track a contact if necessary.
   - **Occupation**: Choose the individual's field of work.
   - **Age**: Click the **Age** button to the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.

- **Date of birth**: Click the **Date of birth** button to open a **Date of birth** field with a calendar dropdown from which you may select the precise date. Go.Data calculates the individual's age.
- **Years or Months**: Enter the individual's age based on the unit of measure in the **Years/Months** field. For months, you may only enter whole numbers up to 11 for people under 1 year of age.
- **Years/Months**: Choose the unit of measure in years or in months for the individual's age.
- **Pregnancy status**: Choose an option to reflect whether the contact is pregnant.
- **Date of reporting**: Choose the date you first became aware of the individual.
- **Date of reporting approximate**: Select this toggle if the date of reporting is an estimate.
- **Add another vaccine**: Click this link to open a section in which to add vaccine information related to the individual.
- **Vaccine**: Required if entering vaccine information.
- **Vaccine date**: Choose the date the vaccine was given.
- **Vaccine status**: Required if entering vaccine information.
- **Add another document**: Click this link to open a section in which to add one or more additional personal identification documents related to the individual.
- **Document type**: Choose a document type including national ID cards, passports, and vaccination cards. Required.
- **Document number**: Enter the identification number from the document. Required.

5. Click the **Next** button.
6. Complete the Address tab.

- **Type**: Choose the status of the address you are reporting. Required. For example, Current Address indicates the individual's primary address. You can have only one current address.
- **Date**: Enter the date you documented the address.
- **Area**: Choose the general location of the address. Required.
- **City**: Enter the city where the address is located.
- **Postal code**: Enter the postal code of the location where the address is located.
- **Address**: Enter the first line of the address or description to define the physical location of the address. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.
- **Latitude and Longitude**: Enter the geographical coordinates where the address is located.
- **Coordinates are accurate**: Toggle this option if the geographical coordinates of the address can be accurately used to locate the address, e.g. geocoordinates of the household.
- **Phone number**: Enter the telephone number associated with the individual.
- **Add another address**: Click this link to open a section in which to add one or more additional addresses of interest to the entry.

7. Click the **Next** button.
8. Complete the Relationship tab.

- **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
- **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
- **Certainty level:** Choose your confidence level that the contact was exposed to a case or event was exposed at the time of the exposure you are documenting. Required.
- **Exposure type:** Choose how the contact could have been exposed to the case or event.
- **Exposure frequency:** Choose how often the exposure type occurred.
- **Exposure duration:** Choose how long the exposure continuously occurred.
- **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.

- **Relationship:** Enter the relationship between the contact and the case or event as it relates to the individual record.
- **Cluster:** Choose the specific cluster to which the case belongs.
- **Comment:** Enter notes about the record.

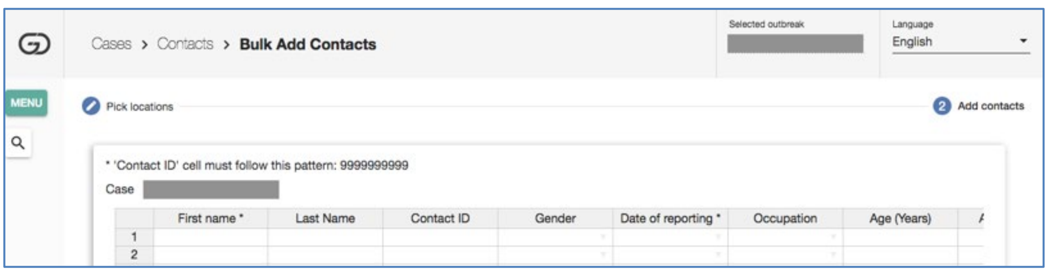
9. Click the **Next** button.
10. Do one of the following:

    - Click the **Create contact** button to add this contact to Go.Data and display the new Contact's details.
    - Click the **Create and add another** button to add this contact to Go.Data and return to the **Create contact** screen to add another contact.

    Go.Data displays a data entry completed message.

Adding contacts in bulk and creating case contact relationships

You can add new contact entries in bulk and simultaneously relate contacts to an existing case in a spreadsheet-like user interface.



To add contacts in bulk to a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case to which to add multiple contacts and click the **Options** icon.
3. Click **Bulk Add Contacts**.

   Go.Data displays a window with a table.
4. Complete the fields in the **Bulk Add Contacts** spreadsheet. Required fields are marked with an asterisk.
5. When you are done entering the information for each contact, click the **Save** button.

   Go.Data displays the case to which the contacts were assigned.

Adding or modifying contact relationships

You can create a contact relationship between a case and one or more other cases, contacts, or events.

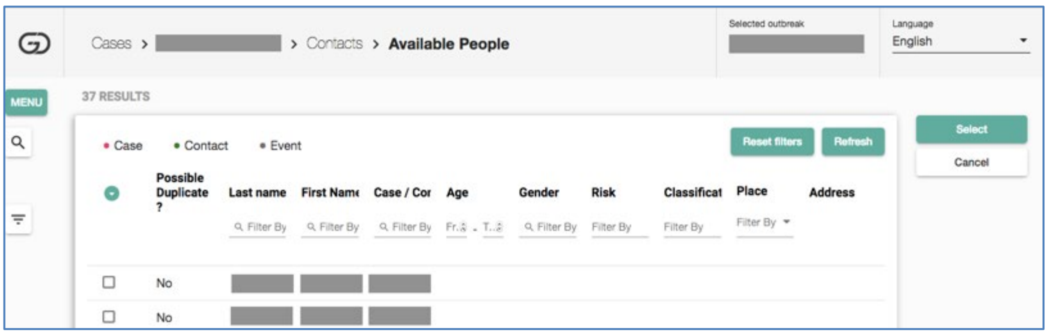
Relationships can indicate association by contact with other cases, contacts, or events. For example, a sick individual (a case) might have been in contact with his sick brother (another case) or at the market (an event).

If you create relationships for more than one contact at a time, you can use the field-level Copy value feature, which copies the value from a field in one relationship to the same field in the other relationships being created. For example, if you are creating relationships for six brothers and sisters, you can copy the Relationship of Sibling from one relationship to all of the rest, instead of entering each individually.

You can modify a contact relationship at any time, for example, if you discover that the contact occurred at a time different than originally thought.

Available people list

In addition to the Cases list and Case details, adding or modifying contact relationships uses the Available people list. This list provides a single location to select and view the available records in Go.Data to create relationships.



By default, the Available people list shows all cases, contacts, and events for an outbreak. The records displayed by the Available people list contain identifying details, address, and epidemiological risk information.

You may select one or more records from the Available people list to create relationships with.

This list is the same format regardless of whether you are creating a contact relationship or an exposures relationship. The content available depends upon whether you are adding a contact relationship or an exposures relationship.

This list uses standard functionality as defined in Working with lists.

Available people list field definitions

Item	Description
Possible Duplicate?	Indicates if a case, contact, or event may already be related.
Last name	The family name of the individual.
First Name	The given name of the individual or the name of the event.
Case / Contact ID	The unique identifier of a case or contact.
Age	The exact or approximate age of the individual with the individual’s age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.

Classification	Case classification.
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of an individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Available people list actions

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to the records.

To add a contact relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Click the **Contacts** button.

   Go.Data displays the Case contacts list or Case exposures list with currently associated with currently associated cases, contacts, and events.
4. Click the **Add+** button.

   Go.Data displays the **Available people** list.
5. Click the checkbox to the left for each case, contact, or event to create a relationship.
6. Click the **Select** button.
7. Complete the Relationships tab for each relationship.

   - **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
   - **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
   - **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the exposure you are documenting. Required.
   - **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
   - **Exposure frequency:** Choose how often the exposure type occurred.
   - **Exposure duration:** Choose how long the exposure continuously occurred.
   - **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
   - **Relationship:** Enter the relationship between the case, contact, or event as it relates to the individual record.
   - **Cluster:** Choose the specific cluster to which the case belongs.
   - **Comment:** Enter notes about the record.

NOTE	If you are creating relationship to more than one individual at the same time you can use copy down icon next to each field in the relationships page to use same value for all records.

8. Click the **Next** button.

   Go.Data displays a data entry completed message.
9. Click the **Create relationship** button.

   Go.Data displays a confirmation message and displays the Case contacts list for the original case with the new contacts added.

To modify a contact relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Click the **Contacts** button.

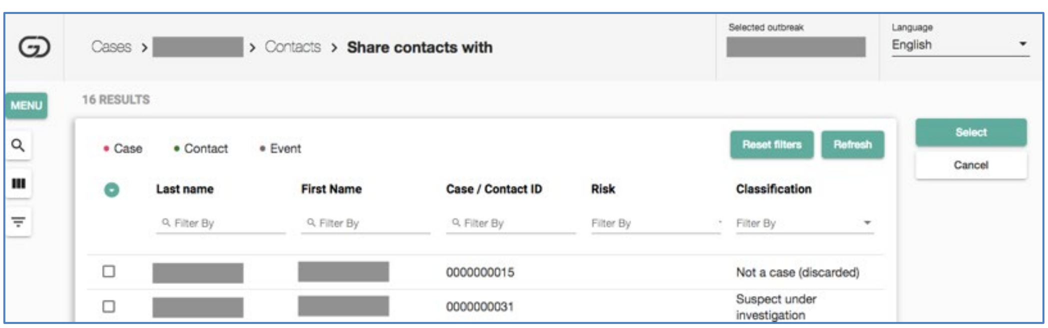
   Go.Data displays the Case contacts list with all related contacts.
4. Hover over a record and click the **Options** icon.
5. Click the **Modify relationship** icon.

   Go.Data displays the Relationship details.
6. Update the Details tab and click the **Save** button.

   Go.Data displays a **relationship modified** message.

Sharing selected contact relationships between cases

You can copy contact relationships between cases. For example, you might use this feature when people from the same family have the same contacts. You can share one or more relationships at one time. First, you select the record from which to copy the relationships, then choose the relationships, and finally choose the record to receive the relationships.



To share contact relationships between cases

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.
3. Click the **Contacts** button.
4. Click the checkbox to the left of one or more relationships to copy.
5. Click the **Bulk Actions** button and choose **Share selected contacts**.

   Go.Data displays a Share contacts with list.
6. From the records displayed, click the checkbox to the left of one or more records to receive the copied relationships.
7. Click the **Select** button.
8. Update the Relationships tab and click the **Next** button.

   Go.Data displays a data entry completed message.
9. Click the **Create Relationship** button.

   Go.Data copies the relationships to the receiving record(s) and displays the Contacts list for the original record.

Deleting case contact relationships

At any point in the outbreak investigation, you may wish to delete one or more contact relationships. When you delete a relationship from Go.Data, you will no longer be able to track the relationship.

You cannot delete a contact's last relationship with a case or event.

To delete a contact relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Click the **Contacts** button.

   Go.Data displays the Case contacts list with all related contacts.
4. Click the checkbox to the left of one or more relationships to delete.
5. Click the **Bulk Actions** button and click **Deleted selected relationships**.

   Go.Data displays a confirmation message.
6. Click **YES**.

   The relationship is deleted.

Checking whether cases were originally contacts

You can easily check whether a case was originally a contact.

To check whether a case was originally a contact

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Columns to display** icon.
3. Check the **Was a contact** option and click the **Apply** button.

   The Cases list displays the **Was a contact** column with the relevant information for each case.

Converting cases to contacts

You can convert the classification of a case to a contact or of a contact to a case at any time. When you convert, the associated epidemiology and questionnaire information, if any has been entered, may not be available to be viewed but is not lost. If you re-convert, the Go.Data system restores the epidemiology and questionnaire information as appropriate.

To convert a case to a contact

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case you wish to convert to a contact and click the **Options** icon.
3. Click **Convert case to a contact**.
4. Click **YES**.

   Go.Data displays a case successfully converted to a contact message.

Reversing persons in contact relationships

While working with a contact relationship between a case and a contact that is itself a case or between a case and an event, you may determine that the contact or association occurred oppositely from how you originally recorded the relationship in Go.Data. For example, instead of Case A being the connection of Case B, Case B was the connection of Case A.

Instead of creating a new relationship in Go.Data, the system provides simple functionality to reverse the direction of the relationship. This feature is only available between a case and another case or an event.

NOTE	Go.Data will not allow you to reverse a contact relationship if one of the relationship's records is a contact record. The system's logic dictates that contacts are exposed to a case, not vice versa.

To reverse a case to case or case to event relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays Case details.

3. Click the **Contacts** button.

   Go.Data displays the Case contacts list.
4. Hover over an exposure and click the **Modify relationship** icon.

   Go.Data displays the **Case contacts details.**
5. Click the **Reverse persons** button.

   Go.Data displays a **reverse persons confirmation** message.
6. Click **YES**.

   Go.Data reverses the direction of the relationship.

NOTE	You can also navigate to the Case contacts list by selecting **Menu > Cases > Options icon > See contacts**.

Viewing follow-up records for related contacts

Use the Follow-ups for related contacts list to view follow-ups for contacts related to the specified case.

For more information on following up with contact, see Introduction to contact follow-ups.

Working with a case's exposures

Understanding a case's exposures is an important part of outbreak management. Exposures are a type of relationship and can be related to cases or events. These exposures need to be related to individual cases. Individual cases may have one or more exposures.

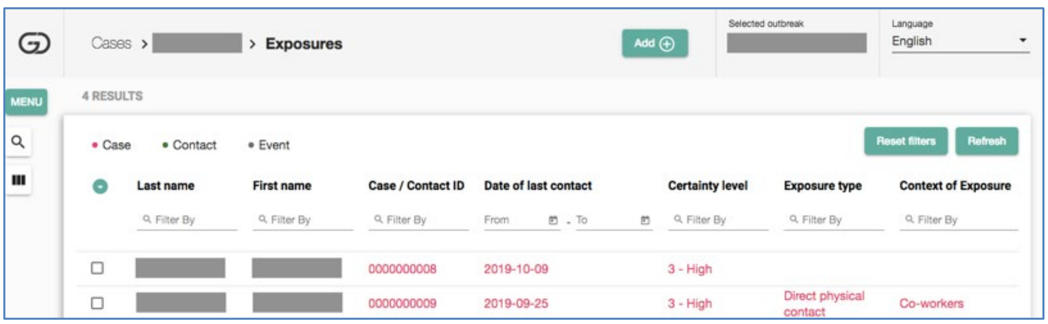
Go.Data makes viewing a case's exposures, either in a line list or individually, easy. You can view all relationships related to a case, whether to other individuals and or to events to which they are linked.

These views allow you to view exposures records within a selected outbreak and to initiate actions, such as modifying sharing exposure relationships.

- **Case exposures list**: a single location to view all exposure records related to a case.
- **Exposure details**: a single location to view the individual exposure records related to a case.

Case exposures list

Viewing all exposures for a case at one time allows you to review the individual details and address information for all exposures related to the case. You can use the Case exposures list to view all outbreak exposures related to a specific case.



The Case exposures list provides a single location from which to:

- view case exposures for a selected case;
- manage exposures relationships by adding, updating, and deleting exposures individually and in bulk; and
- share selected exposures.

By default, the Case exposures list shows all exposures for a selected case and is sorted ascending by last name, then by event.

This list uses standard functionality as defined in Working with lists.

Case exposures list field definitions

Item	Description
Case/Contact ID	The unique identifier of a case or contact.
Certainty level	The confidence level that the individual or event was exposed at the time of the contact you are documenting.
Cluster	The specific cluster to which the contact belongs.

Item	Description
Context of Exposure	The type of relationship between the case and exposure that you are documenting.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure.
Exposure duration	The length of time the exposure continuously occurred.
Exposure frequency	The numerical count of how often the exposure type occurred.
Exposure type	The description of how the case, contact, or event could have been exposed to the outbreak.
First name	The given name of the individual or the event name.
Last name	The family name of the individual.
Relation detail	The relationship between the contact and a case or event that you are documenting.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Case exposures list actions

Item	Description
Add + Add	This button allows you to add a new exposure.
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more exposures that you select by clicking the check box to the left of each exposure.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to an exposure selected.
Modify relationship	This hover action opens the exposure selected so you may update the relationship information.
View relationship	This hover action opens the exposure selected so you may view the relationship information.

To view all exposures for a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.
3. Click the **Exposures** button.

   Go.Data displays the Case exposures list with all related exposures.

NOTE	You can also go directly to the Case exposures list for an individual case from the Options context menu. Hover over a case for which you want to view the exposures and from the **Options** icon, click **See exposures**.

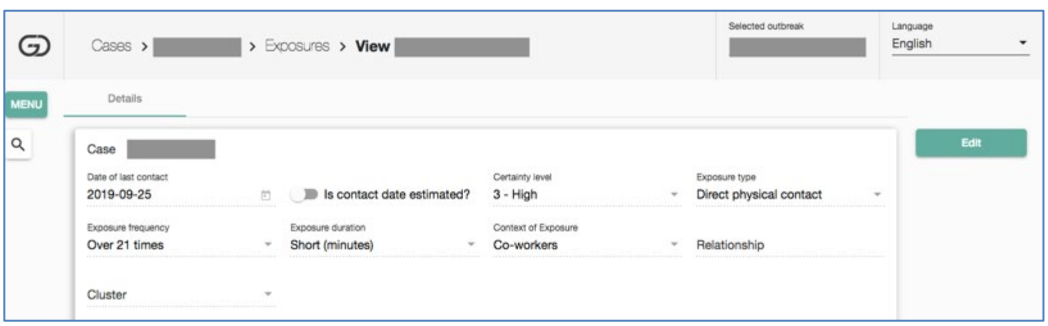
Case exposure details

Case exposure details provides one location to view information, such as relationship details, for a single exposure for a selected case. You can also click the hyperlinked name and see the full case information. The information on the Exposures details is used throughout Go.Data.

The information is found on the Details tab.

Details tab

The details tab includes fields for determining how an exposure is related to a case.



To view an individual exposure for a case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and the **View case** icon.

   Go.Data displays the Case details.
3. Click the **Exposures** button.

   Go.Data displays the Case exposures list with all related exposures.
4. Hover over a record and click the **View relationship** icon.

   Go.Data displays the relationship information.

Adding or modifying case exposure relationships

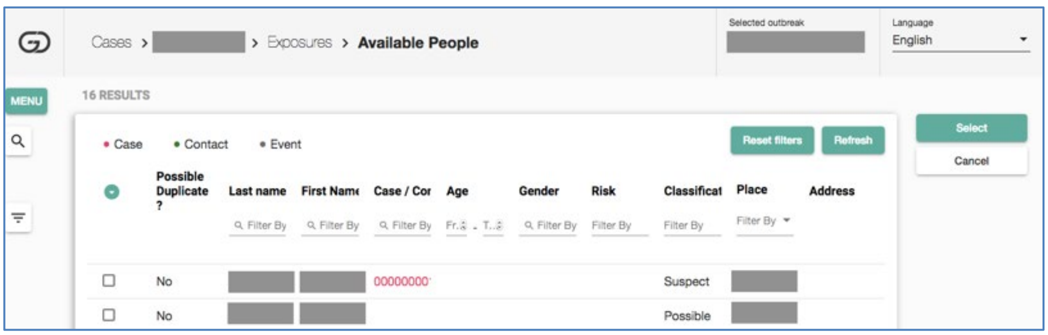
You can create an exposure relationship between a case and one or more other cases or events.

Relationships can indicate exposure, but only to other cases or events, but not with contacts. For example, a sick individual was exposed by his uncle (another case) or exposed at a concert (an event).

You can modify an exposure relationship at any time, for example, if you discover that the exposure duration or frequency was greater than originally thought.

Available people list

In addition to the Cases list and Case details, adding or modifying exposure relationships uses the Available people list. This list provides a single location to select and view the available records in Go.Data to create relationships.



By default, the Available people list shows all cases and events for an outbreak. The records displayed by the Available people list contain identifying details, address, and epidemiological risk information.

You may select one or more records from the Available people list to create relationships with.

This list is the same format regardless of whether you are creating a contact relationship or an exposures relationship. The content available depends upon whether you are adding a contact relationship or an exposures relationship.

This list uses standard functionality as defined in Working with lists.

Available people list field definitions

Item	Description
Possible Duplicate?	Indicates if a case, contact, or event may already be related.
Last name	The family name of the individual.
First Name	The given name of the individual or the name of the event.
Case / Contact ID	The unique identifier of a case or contact.

Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.
Classification	Case classification.
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of an individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Available people list actions

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to the records.

To add an exposure relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Click the **Exposures** button.

   Go.Data displays the Case exposures list with all related exposures.
4. Click the **Add+** button.

   Go.Data displays the **Available people** list.
5. Click the checkbox to the left for each case or event to create an exposure relationship.
6. Click the **Select** button.
7. Complete the Relationships tab for each selected case or event.

   - **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
   - **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
   - **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the exposure you are documenting. Required.
   - **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
   - **Exposure frequency:** Choose how often the exposure type occurred.
   - **Exposure duration:** Choose how long the exposure continuously occurred.
   - **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
   - **Relationship:** Enter the relationship between the case, contact, or event as it relates to the individual record.
   - **Cluster:** Choose the specific cluster to which the case belongs.

- **Comment:** Enter notes about the record.

8. Click the **Next** button.

   Go.Data displays a data entry completed message.

9. Click the **Create relationship** button.

   Go.Data displays a confirmation message and displays the Case exposures list for the original case with the new exposures added.

To modify an exposure relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.

2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.

3. Click the **Exposures** button.

   Go.Data displays the Case exposures list with all related exposures.

4. Hover over a record and click **Modify relationship**.

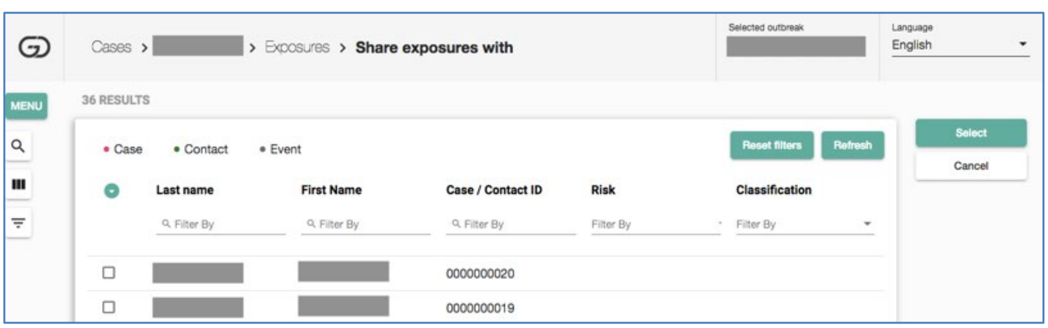
   Go.Data displays the relationship details.

5. Update the **Details** tab and click the **Save** button.

   Go.Data displays a **relationship modified** message.

Sharing selected exposure relationships between cases

You can copy exposures relationships between cases. For example, you might use this feature when people from the same work site have been exposed to the same infected coworkers. You can share one or more relationship at one time. First, you select the record from which to copy the relationships, then choose the relationships, and finally choose the record to receive the relationships.



To share exposure relationships between cases

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.

2. Hover over a case and click the **Modify case** icon.
3. Click the **Exposures** button.
4. Click the checkbox to the left of one or more relationships to copy.
5. Click the **Bulk Actions** button and **Share selected exposures**.

   Go.Data displays a Share exposures with list.
6. From the records displayed, click the checkbox to the left of one or more records to receive the copied relationships.
7. Click the **Select** button.
8. Update the Relationships tab.

   - **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
   - **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
   - **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the exposure you are documenting. Required.
   - **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
   - **Exposure frequency:** Choose how often the exposure type occurred.
   - **Exposure duration:** Choose how long the exposure continuously occurred.
   - **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
   - **Relationship:** Enter the relationship between the case, contact, or event as it relates to the individual record.
   - **Cluster:** Choose the specific cluster to which the case belongs.
   - **Comment:** Enter notes about the record.
9. Click the **Next** button.

   Go.Data displays a data entry completed message.
10. Click the **Create Relationship** button.

    Go.Data copies the relationships to the receiving record(s) and displays the Exposures list for the original case.

Deleting one or more case exposure relationships

At any point in the outbreak investigation, you may wish to delete an exposure relationship. When you delete a relationship from Go.Data, you will no longer be able to track the relationship.

You cannot delete an exposure's last relationship with a case or event.

To delete one or more exposure relationships

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Modify case** icon.

   Go.Data displays the Case details.
3. Click the **Exposures** button.

   Go.Data displays the Case exposures list with all related exposures.

4. Click the checkbox to the left of one or more relationships to delete.
5. Click the **Bulk Actions** button and click **Deleted selected relationships**.

   Go.Data displays a confirmation message.
6. Click **YES** to confirm.

   The relationship is deleted.

Reversing persons in exposure relationships

While working with an exposure relationship between a case and an exposure that is itself a case or between a case and an event, you may determine that the transmission of the disease occurred oppositely from how you originally recorded the relationship in Go.Data. For example, instead of Case A being exposed to the disease from Case B, Case B was actually exposed to the disease from Case A.

Instead of creating a new relationship in Go.Data, the system provides simple functionality to reverse the direction of the relationship. This feature is only available between a case and another case or an event.

NOTE	Go.Data will not allow you to reverse the exposure relationship if one of the relationship's records is a contact record. The system's logic dictates that contacts are exposed to a case, not vice versa.

To reverse a case to case or case to event relationship

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays Case details.
3. Click the **Exposures** button.

   Go.Data displays the Case exposures list.
4. Hover over an exposure and click the **Modify relationship** icon.

   Go.Data displays the **Case contacts details.**
5. Click the **Reverse persons** button.

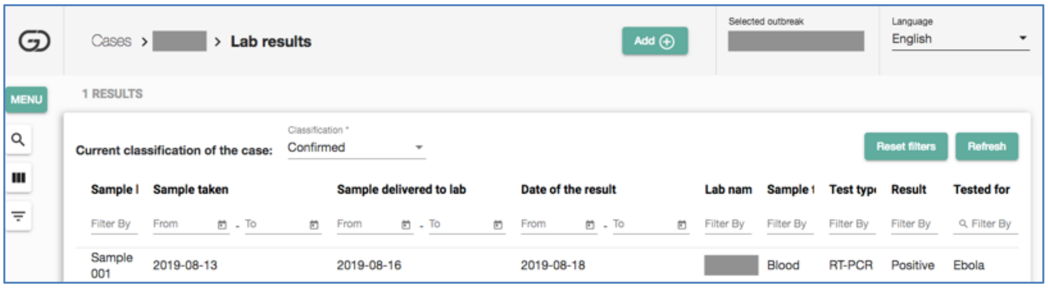
   Go.Data displays a **reverse persons confirmation** message.
6. Click **YES**.

   Go.Data reverses the direction of the relationship.

NOTE	You can also navigate to the Case contacts list by selecting **Menu > Cases > Options icon > See exposures**.

Viewing a case's laboratory results

Use the Case lab results list to view one or more lab results for a case.



For more information on lab results, see Introduction to lab results.

To view a case's lab results

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.
3. Click the **Lab results** button.

   Go.Data displays the Case lab results list.
4. Hover over a lab results you want to view and click the **Options** icon.
5. Click **View lab result**.

   Go.Data displays the Case lab results details.

NOTE	You can also go directly to the Case lab results list for an individual case from the Options context menu. Hover over a case for which you want to view the lab results and from the **Options** icon, click **See lab results**.

Working with case movements

Being able to see and work with an individual's movement either by time or by location on a map can help you trace someone's interactions with cases, contacts, or events.

Viewing case movements

The Case movements view maps the person's address history by time and by geographic locations if known.

To view a case's movements

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.
3. Click the **View movement** button.

   Go.Data displays the Case movements view.

NOTE	You can also go directly to the Case movements view for an individual case from the Options context menu. Hover over a case for which you want to view the movements and from the **Options** icon, click **View movement**.

Exporting a case movement map

You can use the Case movements export a map for the individual's address history.

To export a case movement map

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

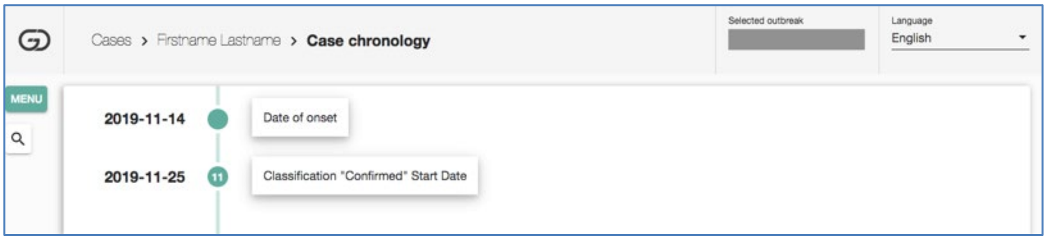
   Go.Data displays the Case details.
3. Click the **View movement** button.

   Go.Data displays the case movements view.
4. Click the **Quick actions** button.
5. Select **Export case movement map**.
6. Complete the **Export case data** screen fields.

   Go.Data exports the data as a map in a .png file.

Viewing case chronologies

Use the case chronology view to see at a glance the activities related to a case. The left column displays the date of the activity, the number in the circle represents the days elapsed since the previous activity, and the right column shows the activity. A zero in a circle indicates that the activity happened on the same calendar date as the previous activity.



To view a case's chronology

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **View case** icon.

   Go.Data displays the Case details.
3. Click the **View chronology** button.

   Go.Data displays the Case chronology view.

NOTE	You can also go directly to the Case chronology view for an individual case from the Options context menu. Hover over a case for which you want to view the chronology and from the **Options** icon, click **View chronology**.

Viewing data quality reports

Go.Data provides several data quality reports. These reports are designed to help you find anomalies, such as unusually long gaps in onset dates. You can use these reports to assist in you in monitoring and case management. Available reports include:

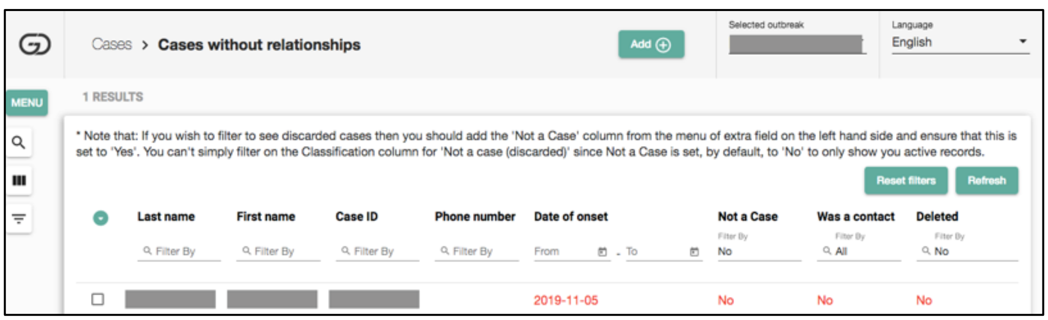
- Cases without relationships: shows all cases without relationships;
- Onset report: shows mismatched onset dates, such as cases where the date of onset is before the onset date of the source case to which it is linked; and
- Onset long period: shows individuals linked by an unusually long gap in their onset dates as specified in the outbreak.

Viewing cases without relationships

When investigating outbreak data, you can view a report of cases that do not contain any relationships. These cases might warrant review to see if relevant contacts or exposures were missed. From the report, you can view the relevant cases and determine what next course of action is most appropriate.

If there are no existing cases without existing relationships in Go.Data, the report displays, “There are no records to be displayed.”

In addition you can use the Add+ button to create a new case from the Cases without relationships list.



To see cases without relationships

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Click **See cases without relationships**.

   Go.Data displays the Cases without relationships report.

Viewing cases with onset dates before parent case onset

The Onset report is designed to show when the date of onset for related cases is out of order. This report shows when a case’s onset is before the onset of the case thought to be the parent case.

Based on this information, you might wish to review the cases in question and determine where the case information is inaccurate and follow up on gathering and updating the information. From the report, you can view the relevant cases and the relationship information and determine what next course of action is most appropriate, including modifying either case or the relationship.

To view cases with onset dates before the source case onset

1. Select **Menu > Cases**.

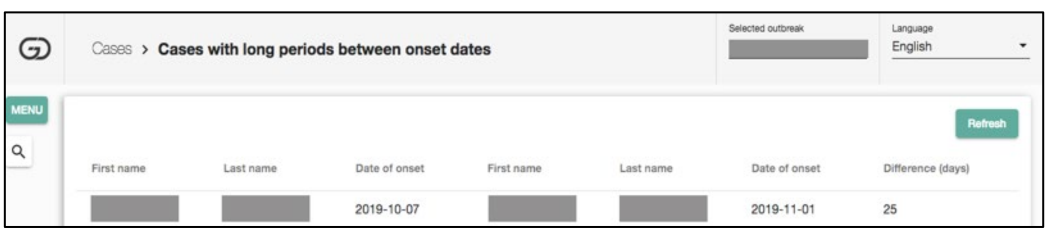
   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Click **Onset report**.

   Go.Data displays the Cases without onset date before parent onset case list. You can click the **Options** icon to see the available actions.

Viewing linked cases with long onset periods

The Onset long period report is designed to show when the date of onset between two cases is unusually long as specified in the outbreak. For example, a gap could indicate an intervening case is missing or the dates of onset are inaccurate.

Based on this information, you might wish to review the cases in question and determine where the case information is inaccurate and follow up on gathering and updating the information. From the report, you can view the relevant cases and the relationship information and determine what next course of action is most appropriate, including modifying either case or the relationship.



To view linked cases with long onset periods

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Click **Onset long period**.

   Go.Data displays the Cases long periods between onset dates list. You can click the **Options** icon to see the available actions.

Importing and exporting information

Being able to exchange information efficiently is a key component of Go.Data. The system allows for a variety of file formats to ensure easy transfers.

You can import and export some or all case data with other copies of Go.Data.

Throughout, however, privacy is important, and Go.Data provides the option to anonymise information, such as name or status, at the time of data export.

Being able to import and export case data allows information to be moved between copies of Go.Data. For example, this feature might be used when transferring data during handover at the end of an individual's mission or when sending data if a case moves between locations and needs to be transferred (for example) between the instance of Go.Data monitoring Location 1 and the instance for Location 2.

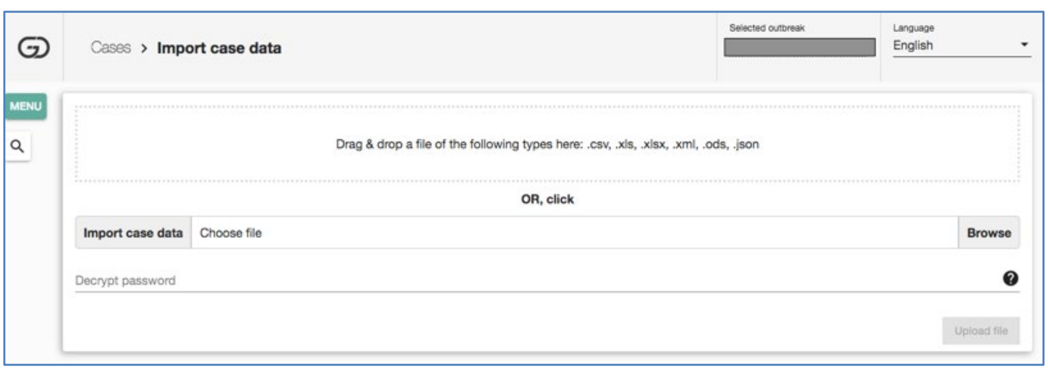
You can also export relationships, dossiers of selected cases, and empty case investigation reports. These options allow for easy follow-ups and data management.

Importing case data

You may wish to import case data from another copy of Go.Data. You can import these records to Go.Data instead of manually entering the results.

You can import records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .ods
- .json.



To import case data

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Select **Import case data**.

   Go.Data displays the Import case data screen.

4. Do one of the following to add the import file to Go.Data:

   - Select a file on your local workstation, then drag and drop the file into the **Drag & drop a file of the following types here** field.
   - Click the **Browse** button to locate the file on your local workstation. Select the file, then click the **Open** button.

5. If the file you are importing has been encrypted, enter the password in the **Decrypt password** field.
6. Click the **Upload file** button.

   Go.Data displays the Import case data screen.
7. Complete mapping to import the data:

   - Verify the Source file information.
   - In the **Model information** column, select the Go.Data destination field from the drop-down menu that best matches the **Source file information** field in the left-hand column. If required, click the **Add field option** button to create additional options or the **Add field** button to create additional rows. You can also delete fields if necessary.

8. Optionally, you can click the **Save import mapping** button to save the **Source file information and Model information fields** for future imports. When you save the file mapping, you can make it public so the mapping may be made available to other users of this instance of Go.Data.
9. Click the **Import file** button.

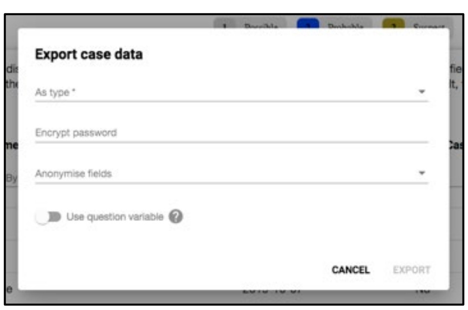
   Go.Data imports the data.

Exporting case data

You can export data in a list for cases. You can also render anonymous one or more fields for the case. In this case, the anonymised fields display *** in lieu of the case's information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export case data

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Select **Export case data**.
4. Complete the **Export case data** screen fields.

   - **As type:** Enter the file format type in which to export the report. Required.
   - **Encrypt password:** Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.
   - **Use question variable:** Select this toggle to use the question variable, instead of the question, as the column header.
5. Click **Export**.

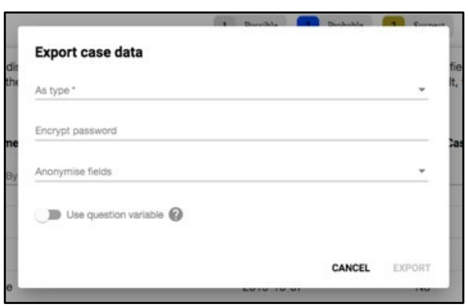
   Go.Data exports the data in the selected file type.

Exporting selected cases

You can also export data in a list for selected cases only. You can also render anonymous one or more fields for the cases. In this case, the anonymised fields display *** in lieu of the case's information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export selected case

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Check one or more cases to modify and click the **Bulk Actions** button.
3. Click **Export the selected cases**.
4. Complete the **Export case data** screen fields.

   - **As type:** Enter the file format type in which to export the report. Required.

- **Encrypt password:** Enter a password that users will need to supply to import the exported file into Go.Data.
- **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.
- **Use question variable:** Select this toggle to use the question variable, instead of the question, as the column header.

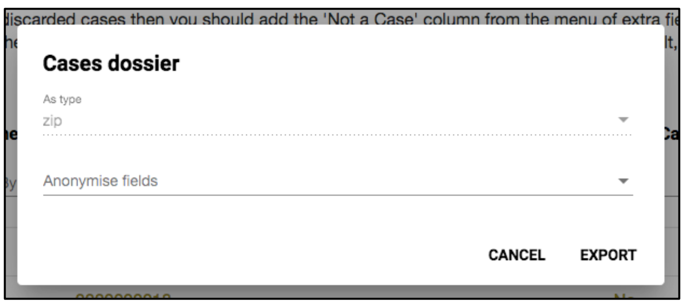
5. Click **Export**.

   Go.Data exports the data in the selected file type.

Exporting a dossier of selected cases

You can export a dossier, or collection, of selected cases. Currently dossiers are available as zipped files only. When you unzip the file, a folder is added to your computer with PDF files of each selected case.

You can also render anonymous one or more fields for the cases. In this case, the anonymised fields display *** in lieu of the case's information.



To export a dossier for selected cases

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Check one or more cases to modify and click the **Bulk Actions** button.
3. Click **Export dossier for selected** cases.
4. Complete the **Cases dossier** screen fields.
   - **As type:** Enter the file format type in which to export the report. Required.
   - **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.
5. Click **Export**.

   Go.Data exports the data in the selected file type.

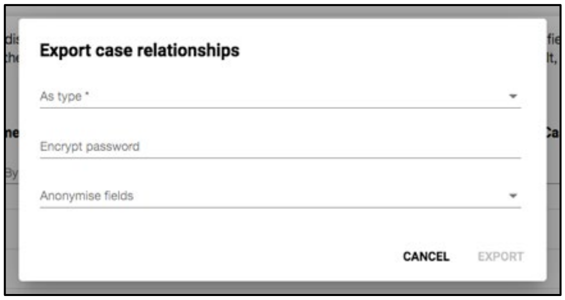
Exporting relationships

Go.Data allows you to export a report of all relationships for an outbreak.

You can export data in a list for the relationships for all cases. Relationships are the individuals or events to which a case is linked. You can also render anonymous one or more fields for the records. In this case, the anonymised fields display *** in lieu of the information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export relationships

1. Select **Menu > Cases**.

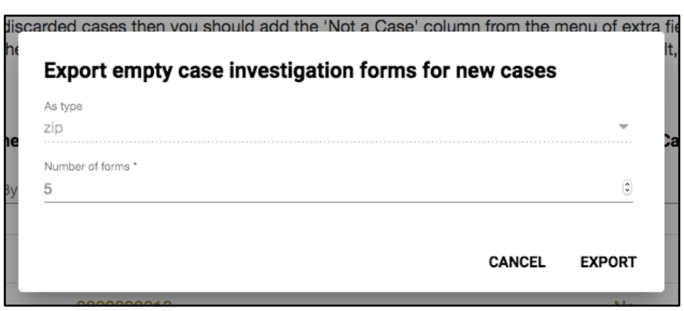
   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Select **Export case** relationships.
4. Complete the **Export case relationships** screen fields.

   - **As type:** Enter the file format type in which to export the report. Required.
   - **Encrypt password:** Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.
5. Click **Export**.

   Go.Data exports the data in the selected file type.

Exporting empty case investigation forms

You can export print-ready empty forms for use in completing offline case investigations. Currently empty case investigation forms are available as zipped files only. When you unzip the file, a folder is added to your computer with PDF files of the chosen number of empty forms. You can then print these forms or make additional copies for use in the field when you might not have access to Go.Data.



To export empty case investigation forms

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Click the **Quick actions** button.
3. Select **Export** empty case investigation forms.
4. Complete the Export empty case investigation forms screen fields.

   - **As type:** Enter the file format type in which to export the report. Required.
   - **Number of forms: Enter** the number of empty forms to print. Required.

5. Click **Export**.

   Go.Data exports the data in the selected file type.

Chapter 9 – Working with lab results

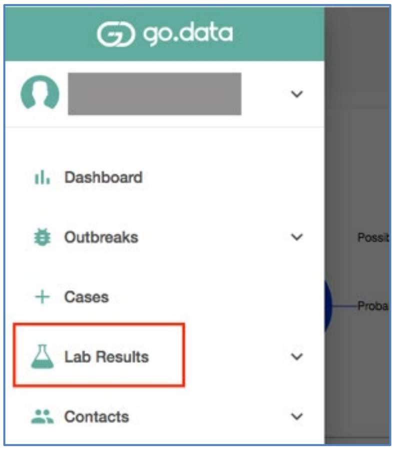
Go.Data has the functionality to document a history of laboratory results for an individual related to an outbreak. Using the Lab results list, you can document and view details of laboratory samples, the laboratory that performed the testing, assigned IDs, status, and results for an individual case.

In addition to individual lab results, you can view Gantt charts displaying the delay between the date of onset and the date of lab testing per case and the delay between symptom onset and date of hospitalization/isolation, which helps you understand the critical timeliness of an outbreak.

Through the Lab results list, you can also create a lab results questionnaire form. Data managers can use this form to document lab results in the field. Once created, you can print lab results forms to manually document lab results to input into Go.Data.

Chapter Contents

Introduction to lab results



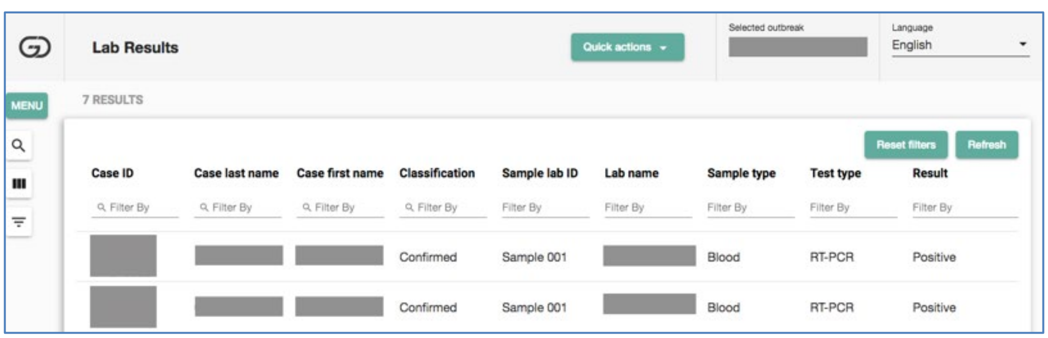
Viewing lab results is essential for understanding outbreak transmissions in Go.Data. Most actions you take concerning lab results start from the Lab results list or the Lab results details.

These views allow you to review lab results for a specific outbreak, initiate actions related to lab results, view lab reports results and visualizations, and import lab results.

- **Lab results list**: a single location to view all lab results for a designated outbreak.
- **Lab results details**: a single location to view specific lab results for a case.

Lab results list

Viewing all lab results at one time allows you to review the samples, sample types, and results for all cases in an outbreak. You can use filters to view lab results with similar information.



The Lab results list provides a single location to view lab results for a selected outbreak, to view individual lab results, modify existing lab results, import lab results, and delete lab results.

By default, the Lab results list shows all lab results for the active outbreak. The lab results include identifying details about each lab sample, test, and result documented for a case.

This list uses standard functionality as defined in Working with lists.

Lab results list field definitions

Item	Description
Case first name	The given name of the individual in the case.
Case ID	The unique identification number of the case. The system defines this number.
Case last name	The family name of the individual in the case.
Classification	Whether the individual is considered a confirmed, probable, or suspect case of the specific outbreak.
Created at	The time (UTC) the *Created by* user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of result	The date on which the laboratory reported the test results for the sample.
Deleted	*Yes* indicates a user has deleted the record. *No* indicates a user has not deleted the record.
Lab name	Name of the laboratory testing the sample.
Result	The laboratory's testing results. Can be positive, negative, inconclusive, or none.
Sample delivered to lab	The date on which the sample was delivered to the laboratory.
Sample lab ID	The identification code used by a laboratory to track a sample.
Sample taken	The date on which the sample was taken from an individual.
Sample type	The specific material being tested by the laboratory.
Test type	The type of test being used by the laboratory to determine results from the sample.
Tested for	The outbreak-related reason for collecting and testing a laboratory sample.
Updated at	The time (UTC) the *Updated by* user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Lab results list actions

Item	Description
Quick actions 	This button opens a menu from which you may choose additional actions related to the lab results.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to the lab result selected.

Item	Description
Modify lab result	This hover action opens the lab result selected so you may update the information.
View lab result	This hover action opens the lab result selected so you may view the information.

To view all lab results

1. Select **Menu > Lab Results > Lab Results**.

   Go.Data displays the Lab results list.

Lab results details

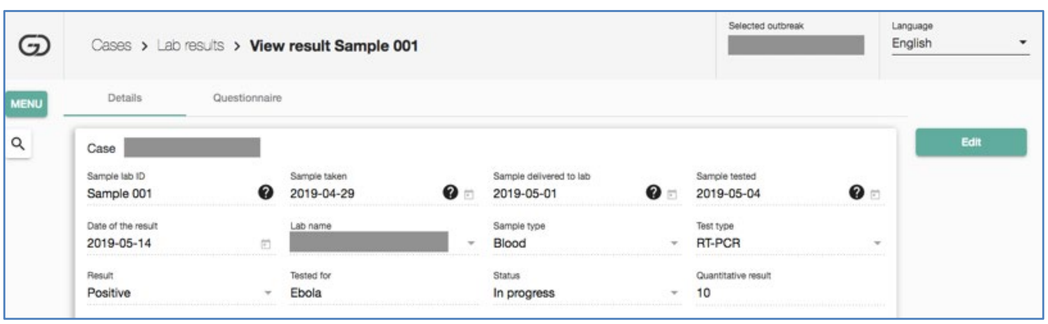
Lab results details provides a single location to view a case's details and lab results questionnaire forms for a specific case for an active outbreak in Go.Data. In addition, you can edit existing lab results.

Lab results details includes information on these tabs:

- Details
- Questionnaire.

Details tab

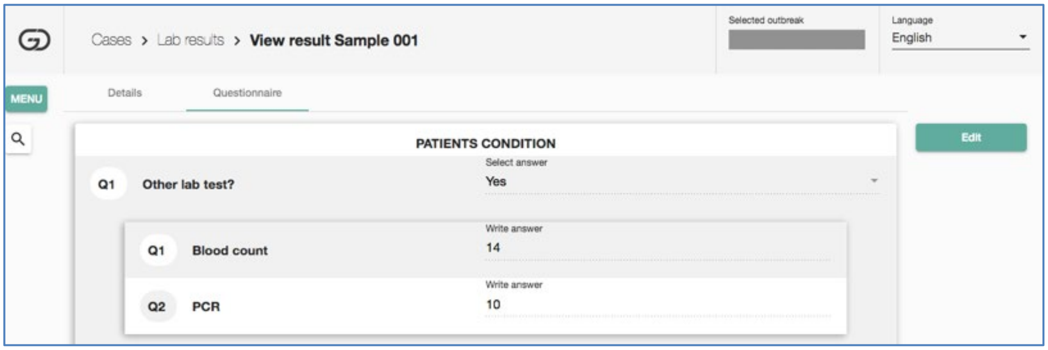
The details tab includes fields for tracking and documenting lab results related to a case, including the lab name, test type, and test results.



Questionnaire tab

The questionnaire contains predefined questions for lab results. Through the questionnaire, you can extend the minimum data set for the default lab results with additional variables relevant to the active outbreak.

The lab results form is unique for each outbreak. For more information on how to modify the lab results questionnaire form, see Questionnaire forms builder.



To view an individual lab result

1. Select **Menu > Lab Results > Lab Results**.

   Go.Data displays the Lab results list.

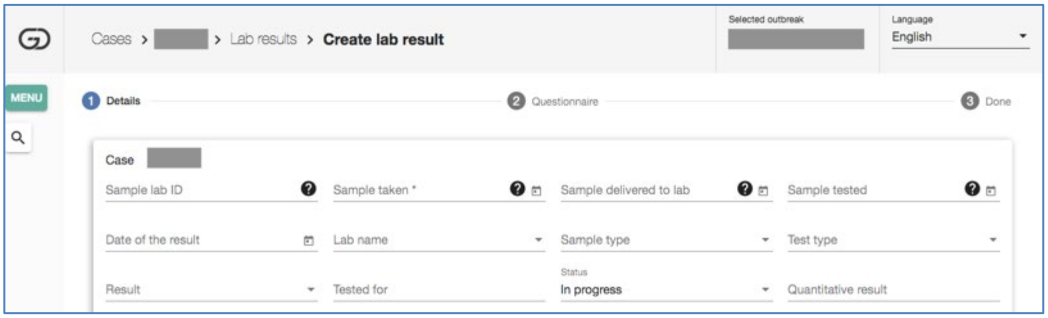
2. Hover over a record and click the **View lab result** icon.

   Go.Data displays Lab results details.

NOTE	You can also view all lab results for a case through Case details. For more information, see Viewing a case's laboratory results.

Adding or modifying lab results

You can add lab results related to cases that exist in Go.Data. Lab results tracks the sample details, lab details, and lab results details for a case in Go.Data for a specific outbreak.



The Create lab results view includes tabs that must be complete for each set of lab results, including:

- Details
- Questionnaire.

For more information on the fields in the lab results list view, see Lab results details.

To add lab results

1. Select **Menu > Cases**.

   Go.Data displays the Cases list.
2. Hover over a case and click the **Options** icon.
3. Click **View case**.

   Go.Data displays Case details with the selected case.
4. Click the **Lab results** button.

   Go.Data displays the Cases lab results list.
5. Click the **Add+** button.

   Go.Data displays the Create lab result details.
6. Complete the **Details** tab.

   - **Sample lab ID**: Enter the identification code used by a laboratory to track a sample.
   - **Sample taken:** Enter the date on which the sample was taken from an individual. Required.
   - **Sample delivered to lab:** Enter the date on which the sample was delivered to the laboratory.
   - **Sample tested:** Enter the date on which the laboratory tested the lab sample.
   - **Date of result:** Enter the date on which the laboratory reported the test results for the sample.
   - **Lab name:** Choose the name of the laboratory testing the sample.
   - **Sample type:** Choose the specific material being tested by the laboratory.
   - **Test type:** Choose the type of test being used by the laboratory determine results from the sample.
   - **Result:** Choose the laboratory's testing results. Can be positive, negative, inconclusive, or none.
   - **Tested for:** Enter the outbreak-related reason for collecting and testing a laboratory sample.

- **Status:** Choose the laboratory's status related to processing the sample. Can be none, in progress, or completed.
- **Quantitative result:** Enter the numerical value relevant to the sample being tested by the lab.
- **Notes:** Enter any additional useful information related to the laboratory sample, test, or results.

7. Click the **Next** button.
8. Complete the **Questionnaire** tab and click the **Next** button.

   Go.Data displays a data entry completed message.
9. Click the **Create lab result** button.

   Go.Data displays a confirmation message and displays the Lab results details.

NOTE	You can also go directly to the lab results for an individual case from the Options context menu. Hover over a case for which you want to view the lab results and from the **Options** icon, click **See lab results**.

To modify lab results

1. Select **Menu > Lab Results > Lab Results**.

   Go.Data displays the Lab results list.
2. Hover over a lab result and click the **Modify lab result** icon.

   Go.Data displays the Lab results details.
3. Complete the **Details** tab and click the **Next** button.
4. Complete the **Questionnaire** tab and click the **Next** button.
5. Click the **Save** button.

   Go.Data displays a lab results modified message.

Deleting lab results

Subject to your user permissions, you will be able to delete lab results. When you delete lab results from Go.Data, they will be removed from the case lab results as well.

All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

To delete lab results

1. Select **Menu > Lab Results > Lab Results**.

   Go.Data displays the Lab results list.
2. Hover over a lab result and click the **Options** icon.
3. Select **Delete lab result**.

   Go.Data displays a delete confirmation message.
4. Click **YES** to confirm.

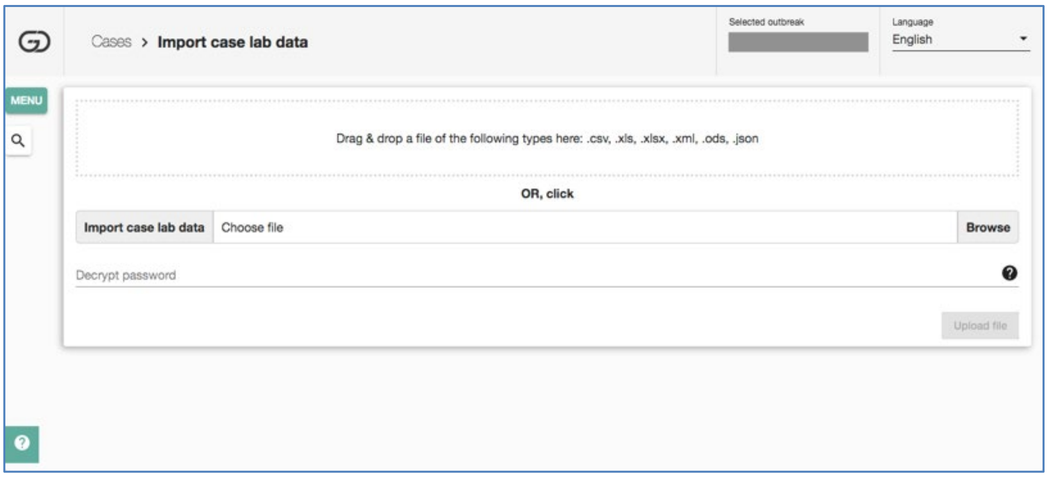
   Go.Data deletes the lab results and displays a “Lab result deleted message.”

Importing lab data

A laboratory may provide you lab test results in bulk, or you may need to import lab results from another copy of Go.Data. You can import these results to Go.Data instead of manually entering them.

You can import case lab data in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .ods
- .json.



To import case lab data

1. Select **Menu > Lab Results > Lab Results**.

   Go.Data displays the Lab results list.
2. Click the **Quick Actions** button.
3. Select **Import Lab Data**.

   Go.Data displays the Import case lab data screen.
4. Do one of the following to add the import file to Go.Data:

   - Select a file on your local workstation, then drag and drop the file into the **Drag & drop a file of the following types here** field.
   - Click the **Browse** button to locate the file on your local workstation. Select the file, then click the **Open** button.

5. If the file you are importing has been encrypted, enter the password in the **Decrypt password** field.
6. Click the **Upload file** button.

   Go.Data displays the Import case lab data screen.

7. Complete mapping to import the lab results.
8. Verify the **Source file** information.
9. In the **Model information** column, select the Go.Data destination field from the drop-down menu that best matches the **Source file information** field in the left-hand column. If required, click the **Add field** button to create additional rows. You can also delete fields if necessary.
10. Click the **Save import mapping** button to save the **Source file information** and **Model information fields** for future imports.
11. Click the **Import file** button.

    Go.Data imports the data.

Working with lab results Gantt charts

Using Go.Data's Gantt chart dashboard, you can generate and view Gantt charts to visually represent lab results. These Gantt charts allow you to view the delay between the date of onset and the date of lab testing or the delay between symptom onset and date of hospitalization/isolation.

A case must exist in Go.Data with relevant data and lab results to generate a lab results Gantt chart.

Gantt chart dashboard

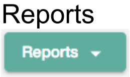
The Gantt chart dashboard provides a single location to view lab results Gantt charts for a selected outbreak.

By default the Gantt chart dashboard displays the Delay between symptom onset and date of lab testing Gantt chart. You can use the drop-down menu to change the type of Gantt chart Go.Data displays.

You can also use the Reports button to generate and download a .pdf version of a Gantt chart.

This list uses standard functionality as defined in Working with lists.

Gantt chart dashboard field definitions

Item	Description
Reports 	This button opens a menu from which you may choose additional actions related to the lab results reports.
Drop-down menu	The drop-down menu changes the type of Gantt chart that Go.Data displays.
Show months	Go.Data displays the Gantt chart in terms of months.
Show weeks	Go.Data displays the Gantt chart in terms of weeks.
Show days	Go.Data displays the Gantt chart in terms of days.

Viewing a Gantt chart of the delay between onset and date of lab testing

Viewing a Gantt chart of the delay between onset and date of lab testing allows you to review the duration from when an individual started displaying symptoms of the outbreak disease to when a lab was able to test the individual's sample.

To view a Gantt chart of the delay between onset and date of lab testing

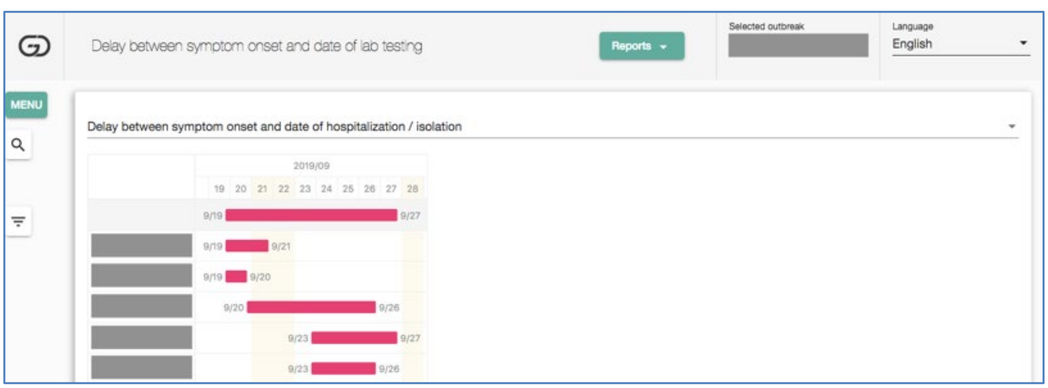
1. Select **Menu > Lab Results > Gantt Chart**.

   Go.Data displays the Gantt chart dashboard.
2. Select **Delay between symptom onset and date of lab testing** from the drop-down menu.

   Go.Data displays the Delay between symptom onset and date of lab testing Gantt chart.

Viewing a Gantt chart of the delay between symptom onset and date of hospitalization/isolation

Viewing a Gantt chart of the delay between symptom onset and date of hospitalization/isolation allows you to review the duration from when an individual started displaying symptoms of the outbreak disease to when the individual was hospitalized or placed in isolation.



To view a Gantt chart of the delay between symptom onset and date of hospitalization/isolation

1. Select **Menu > Lab Results > Gantt Chart**.

   Go.Data displays the Gantt chart dashboard.
2. Select **Delay between symptom onset and date of hospitalization/isolation** from the drop-down menu.

   Go.Data displays the Delay between symptom onset and date hospitalization/isolation Gantt chart.

Downloading Gantt charts

Go.Data allows you to download Gantt charts in .pdf format to save and print for use when you would like to arrange the Gantt chart on a wall or bulletin board or for situations in which you will not have access to Go.Data.

To download a Gantt chart

1. Select **Menu > Lab Results > Gantt Chart**.

   Go.Data displays the Gantt chart dashboard.

3. Select the type of Gantt chart you want to download from the drop-down menu:

   - Delay between symptom onset and date of lab testing
   - Delay between symptom onset and date of hospitalization/isolation

   Go.Data displays the selected Gantt chart.

4. Select a time period for how the data will display in the Gantt chart:

   - **Show months**: Go.Data displays the Gantt chart in terms of months.
   - **Show weeks**: Go.Data displays the Gantt chart in terms of weeks.
   - **Show days**: Go.Data displays the Gantt chart in terms of days.

5. Click the **Reports** button.
6. Select **Gantt Chart**.

   Go.Data generates a .pdf Gantt chart.

Chapter 10 – Managing contacts

At its heart, Go.Data is designed to manage lists of contacts and to generate and record activity during a follow-up period of interest appropriate to the outbreak type.

The Contacts feature provides epidemiologists and data managers with tools to view, monitor, and follow up with people who are or may have been connected either directly or at an event with someone suspected of having or have been diagnosed with the disease being monitored.

Contacts are people at risk of infection through exposure to a case or an event and are always considered within a relationship to a case or an event.

Contacts are the people with whom a case has an exposure relationship, for example, a sick child's teacher. Generally, contacts are people who are not yet considered probable, suspect, or confirmed cases; however, a contact may become a case.

Contacts can also be related to an event, for example, a burial.

One contact can, however, have multiple exposures. For example, a food truck vendor might be exposed to more than one case during his or her stops during a week.

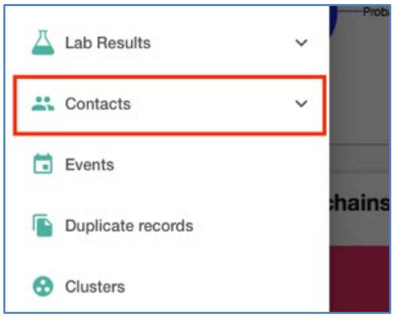
Because contacts are only relevant when related to a case or event, you must add the contact from a case or an event and cannot add new contacts directly from within the Contacts feature. You can, however, modify existing contacts and share contact relationships.

In order to prepare for following up, you should know the date of last exposure of a contact to a case or event, which determines the start and end of the follow-up period. The length of the follow-up period is set according to the type of outbreak. You can also import and export contact data and relationships to make following up easier.

Contacts also includes visualisations for the contact's movement (based on the address history) and a timeline of the significant dates in their epidemiological history.

Chapter Contents

Introduction to contacts

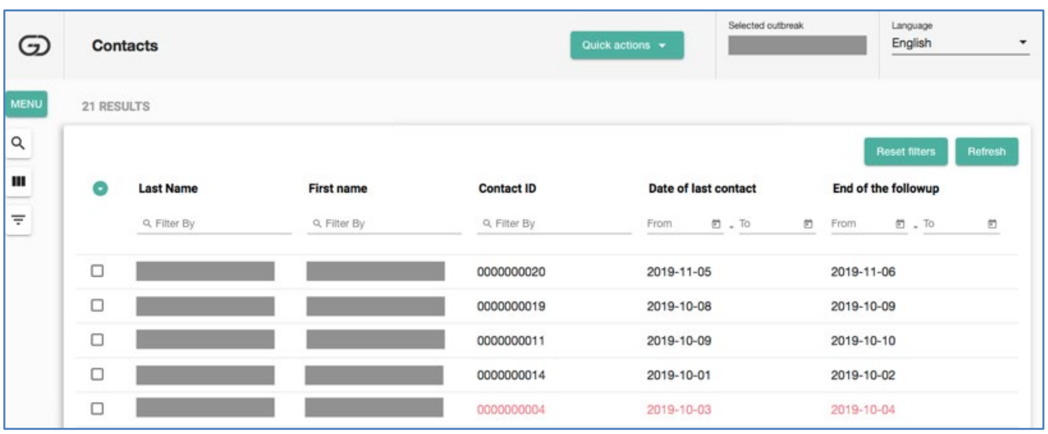


Contacts, either in a line list or individually, is an important part of outbreak management. You must add contacts from a case or an event, however, these views allow you to view contact records within a selected outbreak, to initiate actions, to see reports, and to import and export information.

- **Contacts lists**: a single location to view all contact records related to an outbreak.
- **Contact details**: a single location to view the contact records for a selected contact in an outbreak.

Contacts list

Viewing all contacts at one time allows you to review selected personal, exposure, and follow-up information associated with the contacts for a selected outbreak. You can choose contacts for which to view more details or for which to initiate other actions, such as adding follow up details.



By default, the Contacts list shows all contacts for a selected outbreak and are sorted ascending by last name.

This list uses standard functionality as defined in Working with lists.

Contacts list field definitions

Item	Description
Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Area	The general location of the address.
Contact ID	The unique identifier of a contact.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure between a contact and a case or event.
Deleted	Yes indicates a Go.Data user has deleted the record. No indicates a Go.Data user has not deleted the record.
End of the followup	The date at which the follow-up period is closed.
First name	The given name of the individual.
Follow-up final status	The follow-up status of the individual. For example, Lost to follow up.
Gender	The gender of the individual.
Last name	The family name of the individual.
Number of contacts	The number of contacts for associated with the individual.
Number of exposures	The number of exposures for associated with the individual.
Phone number	The telephone number associated with the individual.
Risk level	The likelihood of infection of the individual. For example, the contact has a high risk level of infection.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.
Was case	Identifies a record that was originally a case.

Contacts list actions

Item	Description
Quick Actions 	This button opens a menu from which you may choose additional actions related to the contacts.
Bulk Actions 	The dropdown arrow opens a menu from which you may choose additional actions related to one or more contacts that you select by clicking the check box to the left of each contact.

Item	Description
Options (Ellipsis menu) ⋮	This hover action opens a menu from which you may choose additional actions related to the contact selected.
Modify contact	This hover action opens the contact selected so you may update the contact's information.
View contact	This hover action opens the contact selected so you may view the contact's information.

To view all contacts

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

Contact details

Contact details provides one location to view the information, such as personal and address details, for a single individual for a selected outbreak. In addition, you can do many activities, including viewing follow-ups, movement, and chronology, as well as adding or viewing exposures.

The information on Contact details is used throughout Go.Data. The information is separated into these tabs:

- Personal
- Address.

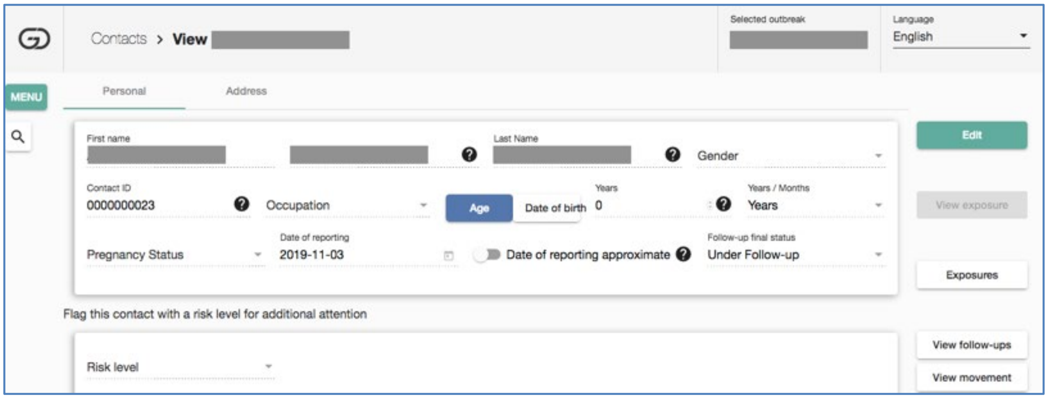
Because you must add contacts from within a case or an event, the Relationship tab is not present in the Contact details view and is only present in the Case or Event new contact view.

For more information on adding a contact through a case, see Adding or modifying cases.

For more information on adding a contact through an event, see Adding or modifying events.

Personal tab

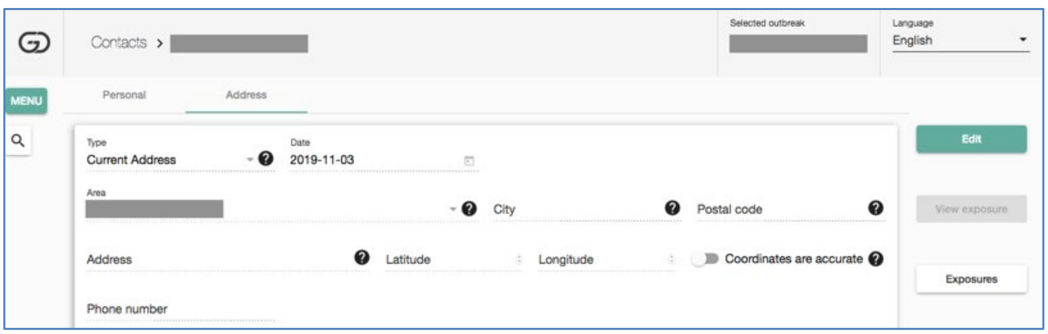
The personal tab includes sections for the individual's personal, risk and reporting, vaccine and personal document information. This information can be used to flag the person for priority follow-up.



Address tab

The address tab includes sections used to locate individuals, including address information. You can view or edit multiple addresses if necessary. Addresses can be street addresses, latitude and longitude, or informal (for example, second house on the left behind the market). The history of addresses and dates are used to create movement maps.

You can have as many address blocks as necessary, but may only have one current address at a time.



To view a contact

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **View contact** icon.

   Go.Data displays the Contact details for the selected contact.

Modifying contacts

While you may not add a contact in the Contacts list, you can modify an existing contact at any time, for example, if the individual has moved or you wish to add an exposure to the contact. You may also modify multiple contacts at one time for a selected outbreak using the bulk action feature.

Case details includes tabs that can be modified for existing cases, including:

- Personal
- Address.

For more information on the fields, see Adding or modifying cases or Adding or modifying events.

To modify a contact

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over the contact and click the **Modify contact** icon.

   Go.Data displays the Contact details.

3. Update the Personal tab or the Address tab.
4. Click the **Save** button.

   Go.Data displays a confirmation message, and each tab includes the information provided.

To modify contacts in bulk

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Check one or more contacts to modify and click the **Bulk Actions** button.
3. Click **Modify selected contacts**.
4. Update the fields in the **Bulk Modify Contacts** spreadsheet. Required fields are marked with an asterisk.
5. When you are done updating the information, click the **Save** button.

   Go.Data displays the Contacts list.

Converting contacts to cases

You can convert the classification of a contact to a case or of a case to a contact at any time. When you convert, the associated epidemiology and questionnaire information, if any has been entered, may not be available to be viewed but is not lost. If you re-convert, the Go.Data system restores the epidemiology and questionnaire information as appropriate.

To convert a contact to a case

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact you wish to convert to a case and click the **Options** icon.
3. Click **Convert to case**.
4. Click **YES** to confirm.

   Go.Data displays a case successfully converted to a contact message.

Deleting contacts

Subject to your user permissions, you will be able to delete a contact. When you delete the contact, you also delete the relationship to any cases, events, or clusters. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

To delete a contact

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **Options** icon.
3. Click **Delete contact**.

   Go.Data displays a delete confirmation message.

4. Click **YES** to confirm.

   Go.Data deletes the contact and displays the Contact list.

Working with a contact’s exposures

Understanding a contact’s exposures is an important part of outbreak management. Exposures are a type of relationship and can be related to cases or events. You can use Go.Data to document exposures that occur related to specific contacts.

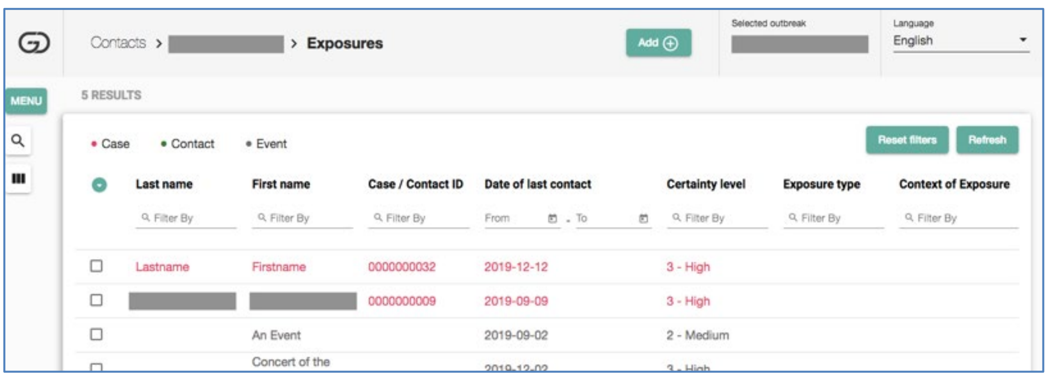
Go.Data makes viewing a contact’s exposures, either in a line list or individually, easy. Most actions on contacts you may wish to take start from either the Contact exposures list or the Contact exposure details.

These views allow you to view exposures records within a selected outbreak and to initiate actions.

- **Contact exposures list**: a single location to view all exposure records related to a contact.
- **Contact exposure details**: a single location to view the individual exposure records related to a contact.

Contact exposures list

Viewing all exposures for a contact at one time allows you to review the individual details and address information for all exposures related to the contact. You can use the Contact exposures list to view all outbreak exposures related to a specific contact.



The Contact exposures list provides a single location from which to:

- view all outbreak exposures for a selected contact
- manage exposures relationships by adding, updating, and deleting exposures individually and in bulk; and
- share selected exposures.

By default, the Contact exposures list shows all exposures for a selected contact and is sorted ascending by last name, then by event.

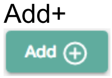
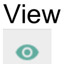
This list uses standard functionality as defined in Working with lists.

Contact exposures list field definitions

Item	Description
Case/Contact ID	The unique identifier of a case or contact.

Item	Description
Certainty level	Your confidence level that the individual was exposed at the time of the exposure you are documenting.
Cluster	The specific cluster to which the contact belongs.
Context of Exposure	The type of relationship between the case, contact, or event and the exposure that you are documenting.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure.
Exposure duration	The length of time the exposure continuously occurred.
Exposure frequency	A numerical count of how often the exposure type occurred.
Exposure type	Describes how the case, contact, or event could have been exposed to the outbreak.
First name	The given name of the individual or the event name.
Last name	The family name of the individual.
Relation detail	The relationship between the contact and a case or event that you are documenting.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Contact exposures list actions

Item	Description
Add+ 	This button allows you to add a new exposure.
Bulk Actions 	The dropdown arrow opens a menu from which you may choose additional actions related to one or more exposures that you select by clicking the check box to the left of each exposure.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to the exposure selected.
Modify relationship 	This hover action opens the exposure selected so you may update the relationship information.
View relationship 	This hover action opens the exposure selected so you may view the relationship information.

To view all exposures for a contact

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **View contact** icon.

   Go.Data displays the Contact details.

3. Click the **Exposures** button.

   Go.Data displays the Contact exposures list with all related exposures.

NOTE	You can also go directly to the Contact exposures list for an individual case from the Options context menu. Hover over a contact for which you want to view the exposures and from the **Options** icon, click **See exposures**.

Contact exposure details

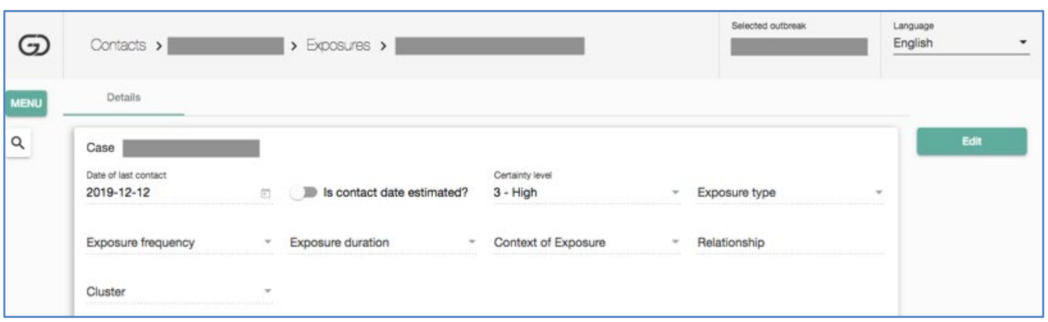
Exposure details provide one location to view information, such as relationship details, for a single exposure for a selected contact. You can also click the hyperlinked name and see the full exposure information, regardless of whether it is a case or an event. The information on the Contact exposure details is used throughout Go.Data.

The information is found on the Details tab.

Details tab

The details tab includes fields for determining how an exposure is related to a contact.

For more information on the fields, see Adding or modifying cases or Adding or modifying events.



To view an individual exposure for a contact

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **Options** icon.
3. Click **See exposures**.

   Go.Data displays the Contact exposures list with all related exposures.

4. Hover over a record and click the **View relationship** button.

   Go.Data displays the relationship information.

Adding or modifying contact exposure relationships

An exposure relationship makes a connection between an existing contact record in Go.Data and an existing case or event for outbreak tracking and management purposes.

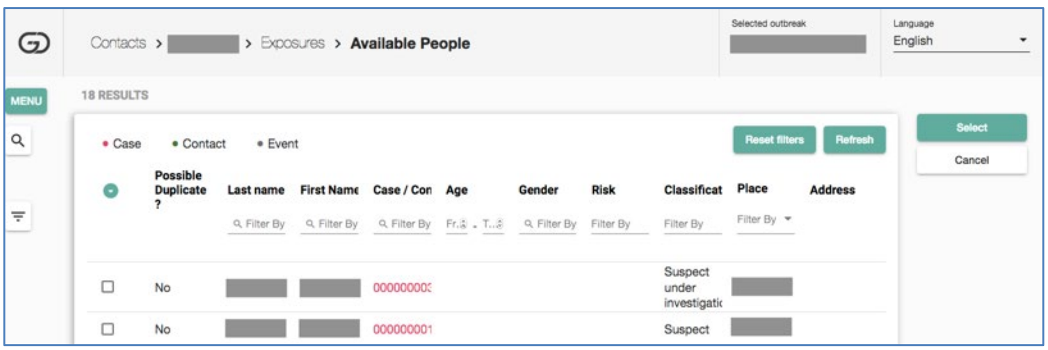
An exposure is a type of relationship that occurred between an existing Go.Data case or event and a specific contact. For example, a sick individual was exposed by his uncle (another case) or exposed at a concert (an event).

Relationships can indicate exposure to other cases or events, but not with contacts.

You can modify an exposure relationship at any time, for example, if you discover that the exposure duration or frequency was greater than originally thought.

Available people list

The Available people list provides a single location to select and view records in Go.Data to create relationships.



By default, the Available people list shows all cases and events for an outbreak. The records displayed by the Available people list contain identifying details, address, and epidemiological risk information.

You may select one or more records from the Available people list to create relationships with.

This list is the same format regardless of whether you are creating a contact relationship or an exposures relationship. The content available depends upon whether you are adding a contact relationship or an exposures relationship.

This list uses standard functionality as defined in Working with lists.

Available people list field definitions

Item	Description
Possible Duplicate?	Indicates if a case, contact, or event may already be related.
Last name	The family name of the individual.
First Name	The given name of the individual or the name of the event.
Case / Contact ID	The unique identifier of a case or contact.

Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.
Classification	Case classification.
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of an individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Available people list actions

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to the records.

To add a contact exposure relationship

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **Modify contact** icon.

   Go.Data displays the Contact details.

3. Click the **Exposures** button.

   Go.Data displays the Contact exposures list with all related exposures.

4. Click the **Add+** button.

   Go.Data displays the Available people list.

5. Click the checkbox to the left for each case or event to create an exposure relationship.

NOTE	Use the **Bulk Actions** button to check or uncheck all available cases and events.

6. Click the **Select** button.
7. Complete the **Relationships** tab for each selected case or event and click the **Next** button.

   Go.Data displays a data entry completed message.

8. Click the **Create relationship** button.

   Go.Data displays a confirmation message and displays the Contact exposures list for the original contact with the new exposures added.

To modify a contact exposure relationship

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over a contact and click the **View contact** icon.

   Go.Data displays the Contact details.
3. Click the **Exposures** button.

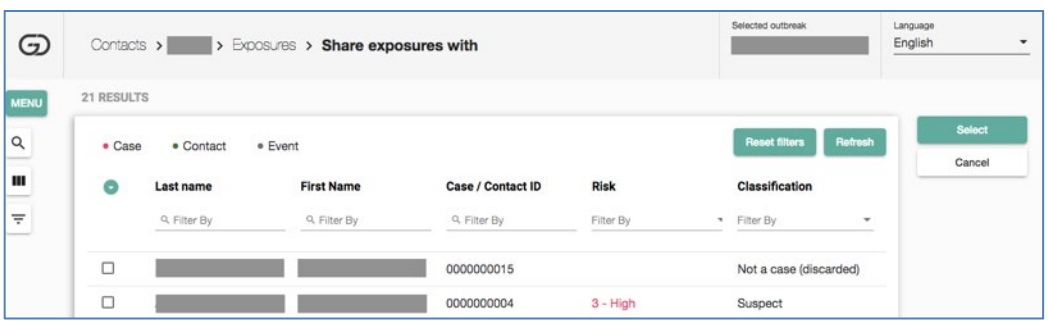
   Go.Data displays the Contact exposures list with all related exposures.
4. Hover over a record and click **Modify relationship**.

   Go.Data displays the relationship details.
5. Update the **Details** tab and click the **Save** button.

   Go.Data displays a relationship modified message.

Sharing selected contact exposure relationships

You can copy relationships, either contacts or exposures, between cases and events. You can share one or more relationship at one time. For example, you might use this feature when children from two families have the same exposures from school. First, you select the record from which to copy the relationships, then choose the relationships, and finally choose the record to receive the relationships.



To share contact exposure relationships

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over a contact and the **Modify contact** icon.

   Go.Data displays the Contact details.
3. Click the **Exposures** button.

   Go.Data displays the Contact exposures list with all related exposures.
4. Click the checkbox to the left of one or more exposures to copy.
5. Click the **Bulk actions** button and select the **Share selected exposures** option.

   Go.Data displays the Share exposures with list.

6. From the records displayed, click the checkbox to the left of one or more records to receive the copied relationship.
7. Click the **Select** button.
8. Update the Relationships tab and click the **Next** button.

   Go.Data displays a data entry completed message.

9. Click the **Create Relationship** button.

   Go.Data copies the exposure relationships to the receiving record(s) and displays the Contact exposures list for the original contact.

Deleting one or more contact exposure relationships

At any point in the outbreak investigation, you may wish to delete an exposure relationship. When you delete an exposure relationship from Go.Data, you will no longer be able to track the exposure relationship.

You cannot delete a contact's last relationship with a case or event.

To delete one or more contact exposure relationships

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **Modify contact** icon.

   Go.Data displays the Contact details.

3. Click the **Exposures** button.

   Go.Data displays the Contact exposures list with all related exposures.

4. Click the checkbox to the left of one or more exposures to delete.
5. Click the **Bulk actions** button and select the **Delete selected relationships** option.

   Go.Data displays a confirmation message.

6. Click **Yes**.

   Go.Data deletes the exposure relationships and displays the Contact exposures list.

Working with contact movements

Being able to see and work with an individual's movement either by time or by location on a map can help you trace someone's interactions with cases, contacts, or events.

Viewing contact movements

The Contact movements view maps the person's address history by time and by geographic locations if known.

To view a contact's movements

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over a contact and click **View contact** icon.

   Go.Data displays the Contact details.
3. Click the **View movement** button.

   Go.Data displays the Contact movements view.

NOTE	You can also go directly to the Contact movements view for an individual contact from the Options context menu. Hover over a contact and from the **Options** icon, click **View movement**.

Exporting a contact movement map

You can use the Contact movements feature to create a map for the individual's address history.

To export a contact movement map

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over a contact and click the **View contact** icon.

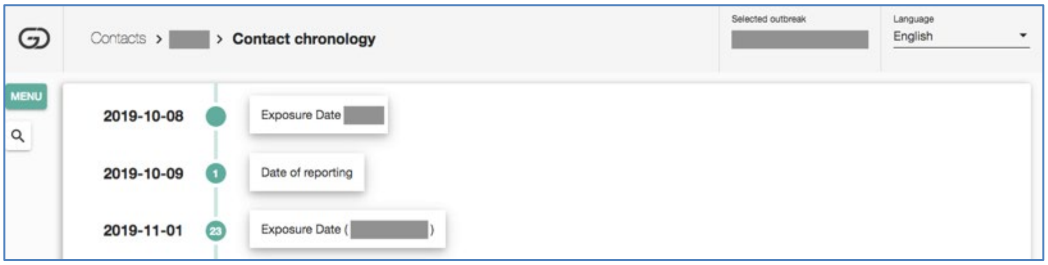
   Go.Data displays the Contact details.
3. Click the **View movement** button.

   Go.Data displays the contact movements view.
4. Click the **Quick actions** button.
5. Select **Export contact movement map**.
6. Complete the **Export contact data** screen fields.

   Go.Data exports the data as a map in a .png file.

Viewing contact's chronologies

Use the contact chronology view to see at a glance the activities related to a contact. The left column displays the date of the activity, the number in the circle represents the days elapsed since the previous activity, and the right column shows the activity. A zero in a circle indicates that the activity happened on the same calendar date as the previous activity.



To view a contact's chronology

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Hover over a contact and click the **View contact** icon.

   Go.Data displays the Contact details.

3. Click the **View chronology** button.

   Go.Data displays the Contact chronology view.

NOTE	You can also go directly to the Contact chronology view for an individual contact from the Options context menu. Hover over a contact and from the **Options** icon, click **View chronology**.

Importing and exporting information

Being able to exchange information efficiently is a key component of Go.Data. The system allows for a variety of file formats to ensure easy transfers.

You can import and export some or all contact data with other copies of Go.Data.

Throughout, however, privacy is important, and Go.Data provides the option to anonymise information, such as name or status.

Being able to import and export contact data allows information to be moved between copies of Go.Data. For example, this feature might be used when sending data if a contact moves between locations and needs to be transferred (for example) between the instance of Go.Data monitoring Location 1 and the instance for Location 2.

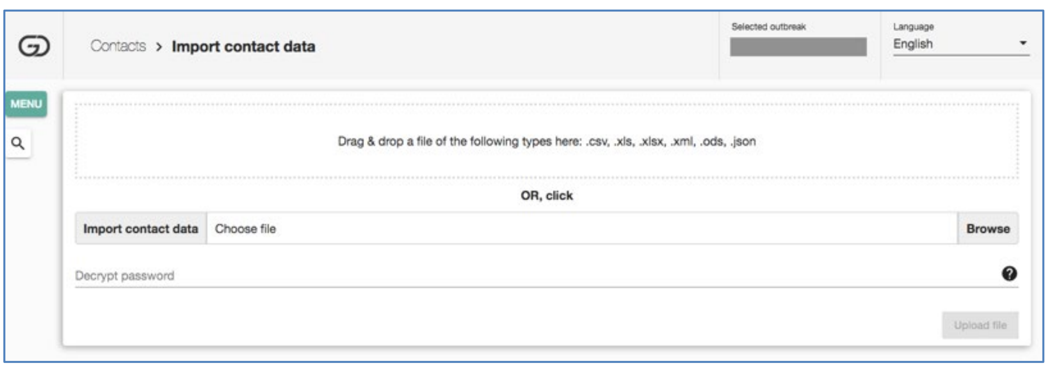
You can also export some or all data for contacts, contact relationships, and detailed dossiers of selected contacts. These options allow for easy follow-ups and data management.

Importing all contact data

You may wish to import contact data from another copy of Go.Data. You can import these records to Go.Data instead of manually entering the results.

You can import records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .ods
- .json.



To import all contact data

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Click the **Quick actions** button.
3. Select **Import contact data**.

   Go.Data displays the Import contact data screen.

4. Do one of the following to add the import file to Go.Data:
   - Select a file on your local workstation, then drag and drop the file into the **Drag & drop a file of the following types here** field.
   - Click the **Browse** button to locate the file on your local workstation. Select the file, then click the **Open** button.
5. If the file you are importing has been encrypted, enter the password in the **Decrypt password** field.
6. Click the **Upload file** button.

   Go.Data displays the Import contact data screen.
7. Complete mapping to import the data:
   - Verify the **Source file** information.
   - In the **Model information** column, select the Go.Data destination field from the drop-down menu that best matches the **Source file information** field in the left column. If required, click the **Add field option** button to create additional options or the **Add field** button to create additional rows. You can also delete fields if necessary.
8. Click the **Save import mapping** button to save the **Source file information** and **Model information fields** for future imports.
9. Click the **Import file** button.

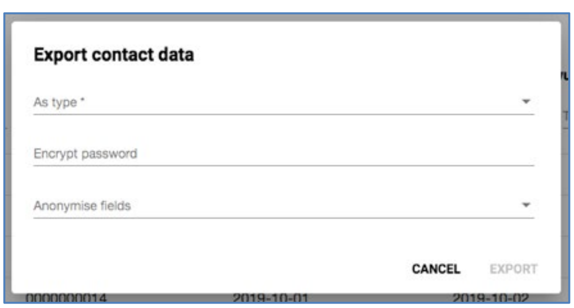
   Go.Data imports the data.

Exporting all contact data

You can export data in a list for all contacts. You can also render anonymous one or more fields for the contacts. In this case, the anonymised fields display *** in lieu of the contact's information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export all contact data

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Click the **Quick actions** button.
3. Select **Export contact data**.
4. Complete the **Export contact data** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.
   - **Encrypt password**: Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields**: Choose one or more fields to anonymise before exporting the records.

5. Click **Export**.

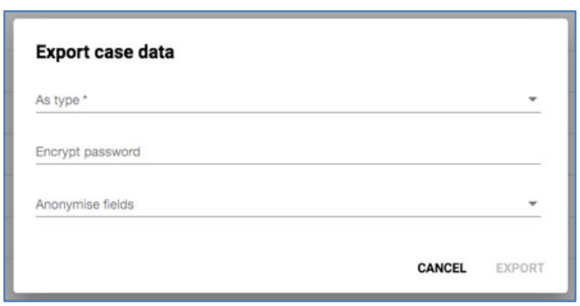
   Go.Data exports the data in the selected file type.

Exporting selected contacts

You can also export data in a list for selected contacts only. You can also render anonymous one or more fields for the contacts. In this case, the anonymised fields display *** in lieu of the contact's information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export selected contacts

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Check one or more contacts to modify and click the **Bulk Actions** button.
3. Click **Export the selected contacts**.
4. Complete the **Export contact data** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.
   - **Encrypt password**: Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields**: Choose one or more fields to anonymise before exporting the records.

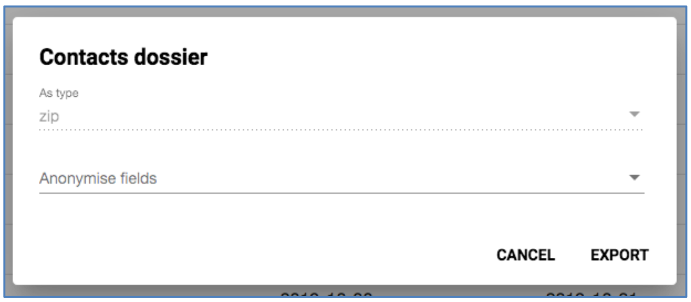
5. Click **Export**.

   Go.Data exports the data in the selected file type.

Exporting a dossier of selected contacts

You can export a dossier, or collection, of selected contacts. Currently dossiers are available as zipped files only. When you unzip the file, a folder is added to your computer with PDF files of each selected contact.

You can also render anonymous one or more fields for the contacts. In this case, the anonymised fields display *** in lieu of the contact's information.



To export a dossier for selected contacts

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Check one or more contacts to modify and click the **Bulk Actions** button.
3. Click **Export dossier for selected contacts**.
4. Complete the **Contacts dossier** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.
   - **Anonymise fields**: Choose one or more fields to anonymise before exporting the records.

5. Click **Export**.

   Go.Data exports the data in the selected file type.

Exporting all contact relationships

You can export data in a list for the relationships for all contacts to the individuals or events to which a contact is linked. You can also render anonymous one or more fields for the records. In this case, the anonymised fields display *** in lieu of the information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.

To export all contact relationships

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Click the **Quick actions** button.
3. Select **Export contact relationships**.
4. Complete the **Export contact relationships** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.
   - **Encrypt password**: Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields**: Choose one or more fields to anonymise before exporting the records.

5. Click **Export**.

   Go.Data exports the data in the selected file type.

Exporting relationships for selected contacts

You can export data in a list for the relationships for selected contacts. Relationships are the individuals or events to which a contact is linked. You can also render anonymous one or more fields for the contacts. In this case, the anonymised fields display *** in lieu of the information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.

To export relationships for selected contacts

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Check one or more contacts to modify and click the **Bulk Actions** button.
3. Click **Export contact relationships**.
4. Complete the **Export contact relationships** screen fields.
   - **As type**: Enter the file format type in which to export the report. Required.
   - **Encrypt password**: Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields**: Choose one or more fields to anonymise before exporting the records.
5. Click **Export**.

   Go.Data exports the data in the selected file type.

Chapter 11 – Following up with contacts

Go.Data exists to generate and track follow-up activities for contacts during the outbreak of an infectious disease.

The data recorded in relation to contact follow-up activities is tracked and managed using the Daily follow-up feature and the Follow-up dashboard. Using these features, you view upcoming follow-up activities, view the status of daily contact follow-ups, view contact follow-up history, and complete follow-up activities, such as the Contact follow-up questionnaire.

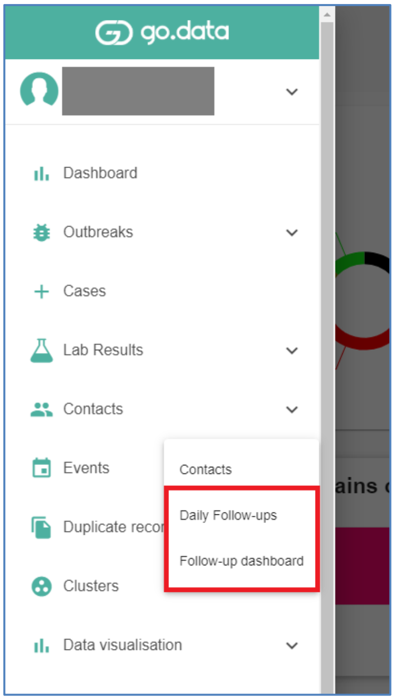
Understanding the status of the contact follow-up is essential to managing and tracking data for an outbreak. Examples of contact follow-up statuses include:

- missed
- not attempted
- not performed
- seen not Ok
- seen ok.

Additionally, Go.Data provides functionality for printing follow-up lists, using mobile devices to manage contact follow-up data, and exporting contact follow-up data.

Chapter Contents

Introduction to contact follow-ups



Go.Data generates and tracks follow-up activities for an individual during the outbreak of an infectious disease. Go.Data provides a clear system for ensuring contacts are followed-up with quickly and efficiently.

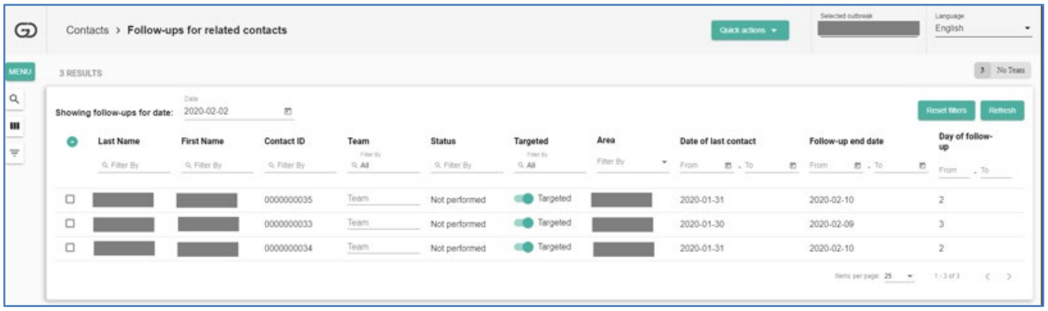
Go.Data provides two features to help you record and visualize contact follow-up data and activities.

- **Follow-ups for related contacts list**: a single location to view all follow-ups for the current date.
- **Range follow-ups dashboard**: a visual overview of follow-up activities over a specified date range for all contacts under follow-up.

For more information on following up with a contact, see Introduction to contact follow-ups.

Follow-ups for related contacts list

Viewing all follow-ups for the current date allows you to review a list of personal, location, follow-up status, and other information associated with a contact record for a selected outbreak. Additionally, the Follow-ups for related contacts list allows you to generate follow-ups, print the follow-up list, export contact follow-up data, view follow-ups, modify contact follow-up questionnaires, modify follow-ups, and delete follow-ups.



By default, the Follow-ups for related contacts list displays all follow-ups for the current date in alphabetical order, organized by the contact's last name. You can use filters to view follow-ups with similar information, build a list of targeted follow-ups, or view follow-ups with a particular status. You can filter the list to view follow-ups for a particular area to assist with basic workload management.

Additionally, the Follow-ups for related contacts list displays groupings at the top of the list, grouped by the assigned team. Each grouping is a button that shows the number of follow-ups assigned to a specific team. Clicking a grouping button displays the matching records. To return to see all follow-ups, click the **Reset filters** button.

This list uses standard functionality as defined in Working with lists.

Follow-ups for related contacts list field definitions

Item	Description
Address	First line of the address or description to define the physical location to follow-up with the contact. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.
Area	The geographical location of the address.
Contact ID	A globally unique identifier created to track a record in Go.Data.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date	The calendar date selected for which to view all follow-ups.
Date of last contact	The most recent date you saw the contact for follow-up.
Day of follow-up	A numerical count of the days the contact has been followed-up with.
Deleted	**Yes** indicates a user has deleted the record. **No** indicates a user has not deleted the record.
First name	The given name of the individual in the case record.
Follow-up end date	The date the follow-up period ended for the contact.
Last name	The family name of the individual in the case record.
Status	The follow-up status of the individual. For example, Lost to follow up.

Item	Description
Targeted	This toggle indicates urgency to follow-up with a particular contact.
Team	The contact tracer team assigned to follow-up with the contact.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Follow-ups for related contacts list actions

Item	Description
Quick Actions Quick actions	This button opens a menu from which you may choose additional actions related to the follow-ups.
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more follow-ups that you select by clicking the checkbox to the left of each follow-up.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a selected follow-up.
Modify follow-up	This hover action opens the follow-up selected so you may modify the follow-up information.
View follow-up	This hover action opens the follow-up record for the selected contact.
Follow-up team summary 1 No Team 1 Team A	These buttons show a numerical count of follow-ups grouped by the assigned contact tracing team.

To view all follow-ups

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.

Follow-up details

Follow-up details provides one location to view contact follow-up information, such as the address and contact follow-up questionnaire information for a single contact for the selected outbreak.

In addition, you can complete other actions related to follow-ups, such as assign the follow-up to a team, edit follow-up record data, edit follow-up questionnaire data, and view the contact record for the follow-up record.

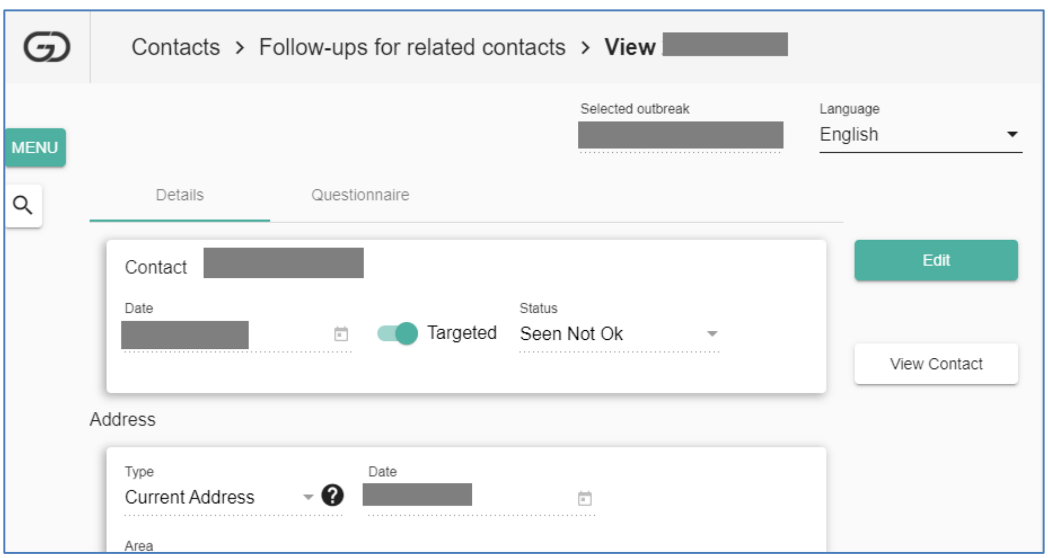
NOTE	By default, team assignment is done based on the current address of the contact. Teams are assigned by geographical location, and by default, all contacts residing in a team's geographic area of responsibility are assigned to members of the team. For more information, see Introduction to teams and assignments.

Follow-up details includes information on these tabs:

- Details
- Questionnaire.

Details tab

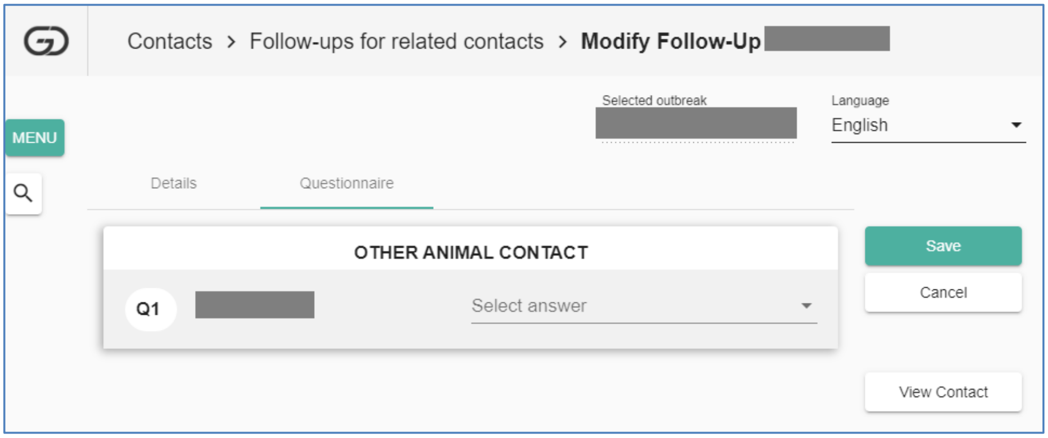
The Details tab contains core record information about a follow-up. From this tab, you can view follow-up information, contact address information, the assigned contact tracer team assigned to the follow-up, and Go.Data behaviour fields.



Questionnaire tab

The questionnaire tab contains data from the contact follow-up form. These questions are relevant to the specific outbreak and either were provided in the original template or established when the identified outbreak was set up in Go.Data.

For more information on responding to questions included in the Questionnaire tab, see Introduction to questionnaire forms.



To view a follow-up

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Hover over a follow-up and click the **View follow-up** button.

   Go.Data displays the Follow-up Details tab.

NOTE	You can also view follow-ups using the Range follow-ups dashboard. Select **Menu > Contacts > Click a cell in the Range follow-ups dashboard table**. For more information, see Viewing the Range follow-ups dashboard.

Following up with mobile devices

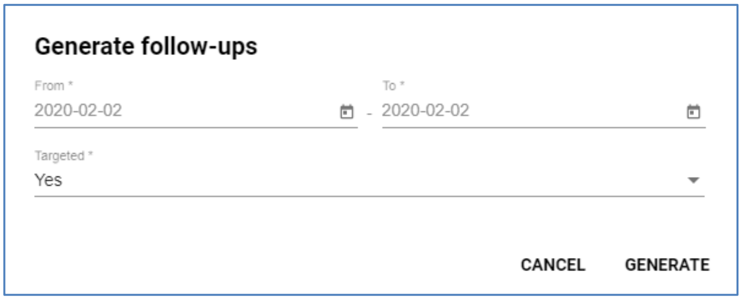
For mobile applications, Go.Data provides similar follow-up functionality to the workstation application.

The Go.Data mobile application provides a list of follow-ups for the current date with user-friendly contact cards. When you complete the follow-up, Go.Data will display a two-tab screen to record the follow-up outcome and complete the contact follow-up questionnaire.

The latest versions of the Go.Data mobile application are available in App store (iOS) and Google Play (Android). For more information on configuring and connecting the mobile application to the appropriate instance of Go.Data, see Adding mobile devices.

Generating a list of follow-ups

Go.Data has the functionality to generate a list of follow-ups based on the date of last contact, duration for the follow-up, and follow-up end date.



Go.Data will stop generating follow-ups for contacts when they have reached the follow-up end date.

When generating a list of follow-ups, you can select a day or the date range for which to generate follow-ups and select if you would like to generate a list of targeted follow-ups or for all follow-ups.

To generate a list of follow-ups

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Click the **Quick actions** button.
3. Select **Generate follow-up**.

   Go.Data displays the Generate follow-ups screen.
4. Complete the Generate follow-up screen fields:

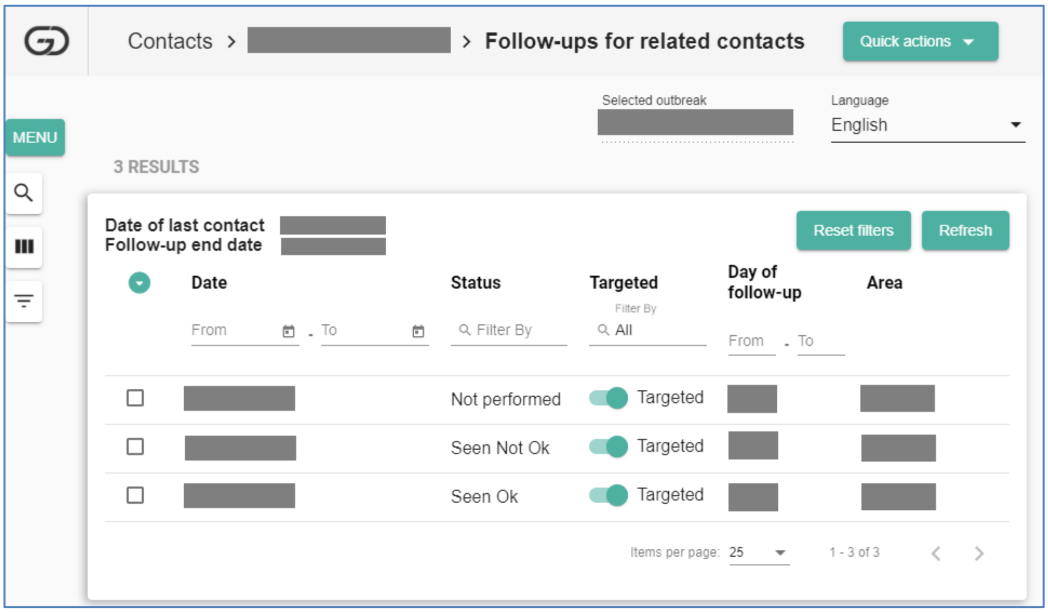
   - **From**: Select a date to start generating follow-ups.
   - **To**: Select a date to stop generating follow-ups.
   - **Targeted**: Select **Yes** to generate follow-ups for targeted contacts only. Select **No** to generate follow-ups for all contacts with follow-ups in the specified date range.
5. Click **Generate**.

   Go.Data generates a list of follow-ups for the specified date range and displays the Follow-ups for related contacts list.

Viewing follow-up records for related contacts

You can use the Follow-up records for related contacts list to review all follow-up records for a related contact. This information allows you to review the progression of the follow-up activity for a specific contact over time.

The Follow-ups for related contacts list displays information such as the date of last contact, follow-up end date, follow-up status, and area.



To view follow-up records for related contacts

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over a case and click the **View contact** icon.

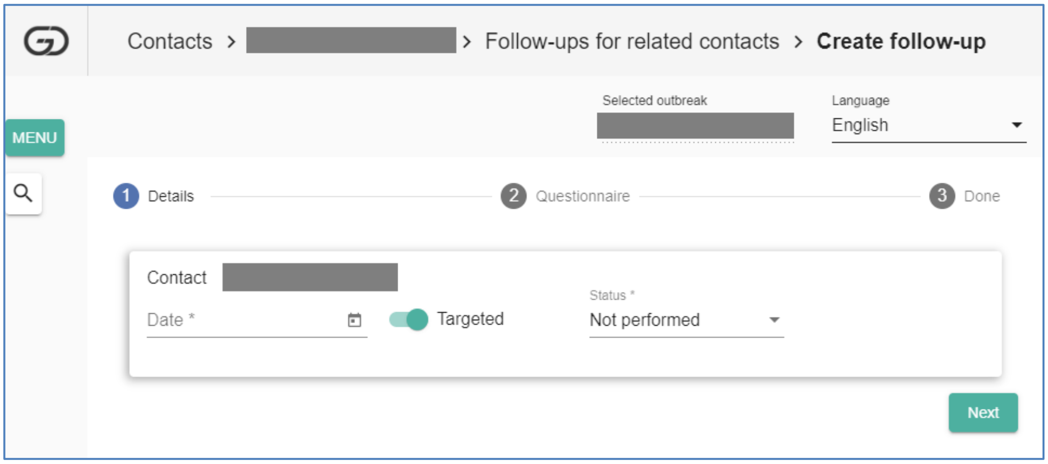
   Go.Data displays the Contacts details.
3. Click the **View follow-ups** button.

   Go.Data displays the Follow-ups for related contacts list.

NOTE	You can also go directly to the Follow-ups for related contacts list for an individual case from the Options context menu. Hover over the case for which you want to view the follow-up records and from the **Options** icon, click **View follow-ups for related contacts**. You can also go directly to the Follow-ups for related contacts list for an individual contact from the Options context menu. Hover over the contact for which you want to view the follow-up records and from the **Options** icon, click **View follow-ups**.

Adding and modifying follow-ups

You can add and modify contact follow-ups at any time during an active outbreak for a preexisting contact record in Go.Data.



Adding follow-ups

The follow-up record stores information related to documenting contact follow-up results, including the contact follow-up questionnaire.

During the follow-up generation process, you can designate the date to complete the follow-up and target contacts to build a priority list of follow-ups, in the event the assigned team does not have the resources to complete all assigned follow-ups.

For more information on adding contacts to Go.Data, see Working with a case's contacts.

To add a follow-up

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Hover over the contact you want to view and click the **Options** icon.
3. Click **Add follow-up**.

   Go.Data displays the Create follow-up Details tab.
4. Complete the Details fields:

   - **Date**: Select the date for which you are creating the follow-up.
   - **Targeted**: Select this toggle if the follow-up should be prioritized.
   - **Status**: Select a status for the follow-up. By default, Go.Data displays **Not performed**.

5. Click the **Next** button.

   Go.Data displays the Create follow-up Questionnaire tab.
6. Complete the Questionnaire fields and click the **Next** button.

   Go.Data displays a data entry completed message.
7. Click the **Create follow-up** button.

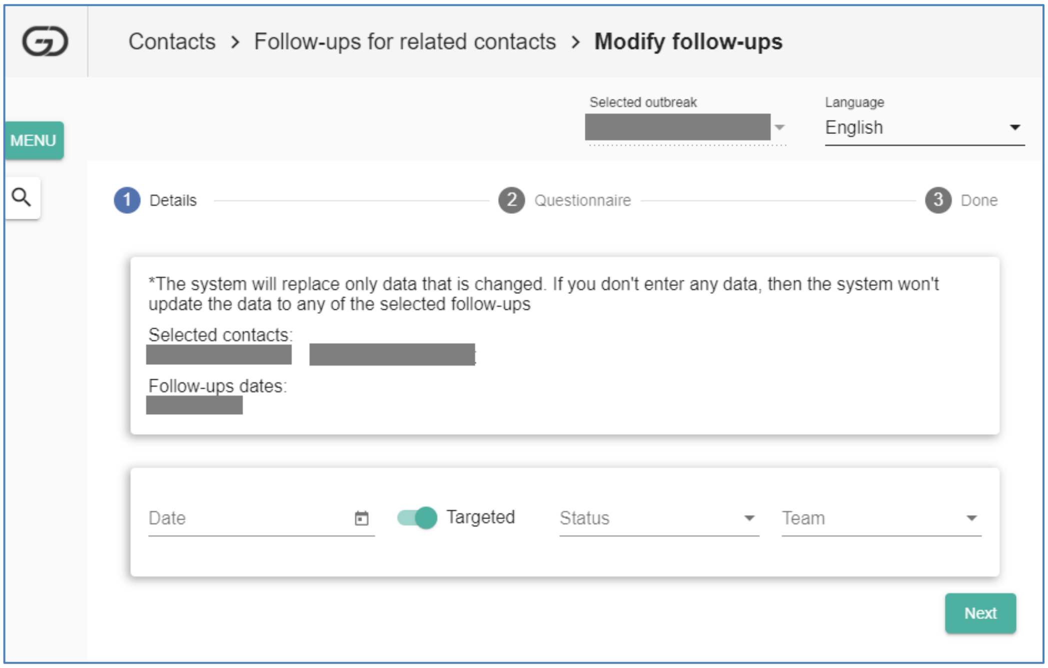
   Go.Data displays the Modify Follow-Up YYYY-MM-DD details where the YYYY is the year, MM is the month and DD is the day of the follow-up.

8. Update the Modify Follow-Up details fields if necessary, including assigning a team, and click the **Save** button.

   Go.Data displays a confirmation message.

Modifying follow-ups

Go.Data allows you to modify the data for an existing follow-up. For example, you may need to reassign the follow-up to a different team or reprioritize the targeted follow-ups.



You can modify a single follow-up or modify multiple follow-ups simultaneously. When modifying multiple follow-ups, the system will only replace the data that you modify. If you do not enter any data, the system will not update the data for any of the selected follow-ups.

To modify a follow-up

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Hover over a follow-up and click the **View follow-up button**.

   Go.Data displays the Follow-up Details tab.
3. Make changes to the **Details** and/or **Questionnaire** tabs.
4. Click the **Save** button.

   Go.Data displays a confirmation message.

NOTE	You can also go directly to the follow-up from the Options context menu. Hover over a follow-up you want to modify and from the **Options** icon, click **Modify questionnaire**. You can also modify follow-ups using the Range follow-ups dashboard. Select **Menu > Contacts > Follow-up dashboard > Click a cell in the**

	Range follow-ups dashboard table containing a follow-up status > Click the Edit button. For more information, see Viewing the Range follow-ups dashboard.

To modify multiple follow-ups simultaneously

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Select the checkboxes for the follow-up records you wish to modify and click the **Bulk Actions** button.
3. Select **Modify the selected follow-ups**.

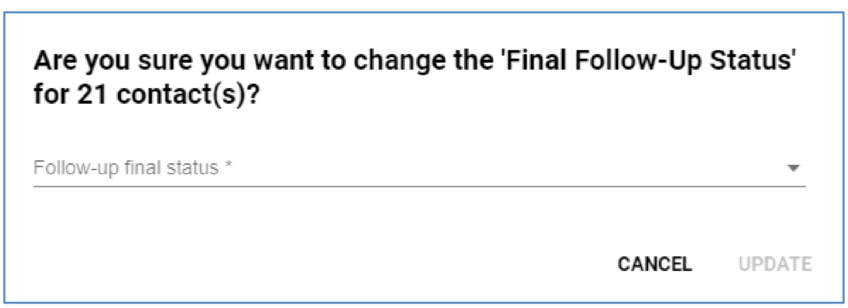
   Go.Data displays the Modify follow-ups Details tab.
4. Make changes to the **Details** and/or **Questionnaire** tabs and click the **Update follow-ups** button.

   Go.Data displays a confirmation message.

Modifying contact final follow-up status

Go.Data allows you to change the follow-up status for all contacts simultaneously. For example, you might want to use this feature after you have determined that all the contacts are being followed up on.

NOTE	Make sure you modify all or selected contacts before completing these steps. You can filter the contact list for specific records and update only those records. Modifying final follow-up status is done in conjunction with the filtering of the contact list.



To change contact final follow-up status

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.

2. Click the **Quick actions** button.
3. Select **Change contact final follow-up status**.
4. Complete the **Final follow-up status** screen fields.
   - **Final follow-up status**: The follow-up status of the individual. For example, Follow-up complete.
5. Click **Update.**

   Go.Data updates all of the records with the information you chose.

Deleting follow-ups

Subject to your user permissions, you will be able to delete a follow-up. All deletes in Go.Data are soft-deletes.

To delete a follow-up

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Select a date for the follow-up you wish to delete.

   Go.Data displays all follow-ups for the selected date.
3. Hover over a follow-up and click the **Options** icon.
4. Select **Delete follow-up**.

   Go.Data displays the **Are you sure you want to delete this follow-up** message.
5. Click **YES**.

   Go.Data deletes the follow-up and displays a confirmation message.

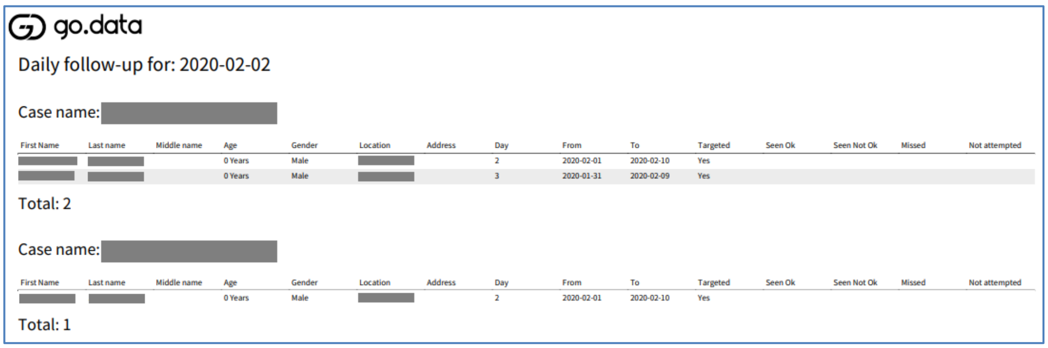
Printing contact follow-up forms

Go.Data allows you to print several different types of reports related to contact follow-ups for an outbreak. Currently, Go.Data allows you to print the following items:

- Daily contact follow-up list
- Daily contact follow-up form.

Printing daily contact follow-up list

You can export and print a daily contact follow-up list to review the recorded follow-up statuses for the day or manually record follow-up data in situations where you do not have reliable access to an online connection.


go.data

Daily follow-up for: 2020-02-02

Case name: [redacted]

First Name	Last name	Middle name	Age	Gender	Location	Address	Day	From	To	Targeted	Seen Ok	Seen Not Ok	Missed	Not attempted
[redacted]	[redacted]		0 Years	Male	[redacted]		2	2020-02-01	2020-02-10	Yes				
[redacted]	[redacted]		0 Years	Male	[redacted]		3	2020-01-31	2020-02-09	Yes				

Total: 2

Case name: [redacted]

First Name	Last name	Middle name	Age	Gender	Location	Address	Day	From	To	Targeted	Seen Ok	Seen Not Ok	Missed	Not attempted
[redacted]	[redacted]		0 Years	Male	[redacted]		2	2020-02-01	2020-02-10	Yes				

Total: 1

By default, Go.Data exports the daily contact follow-ups list in .pdf format. When exporting the daily contact follow-ups list, you can choose to organize the follow-ups grouped by their location (place) or related case (case).

To print the daily contact follow-ups list

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Click the **Quick actions** button.
3. Select **Print follow-up list**.

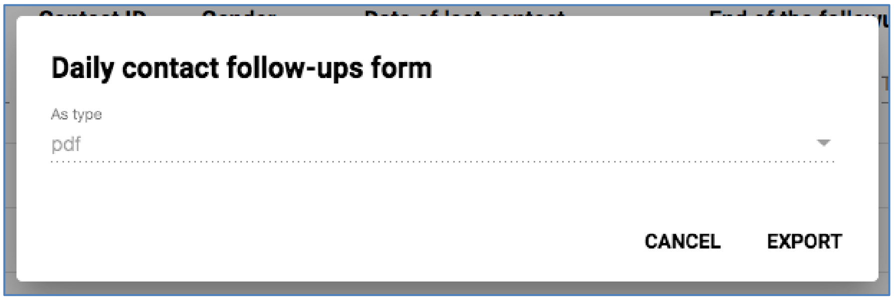
   Go.Data displays the Print follow-up list screen.
4. Complete the Print follow-up list screen fields.
   - **As type**: Select a document format type for the generated follow-up list.
   - **Group by**: Select **Place** to organize follow-ups grouped by location. Select **Case** to organize follow-ups by related case.
5. Click **Export**.

   Go.Data generates the daily contact follow-up list and displays the Follow-ups for related contacts list.

NOTE	You can also print the daily contact follow-up form from the Contacts list by selecting **Menu > Quick actions > Print daily follow-ups status**. For more information about the Contacts list, see Contacts.

Printing daily contact follow-ups form

You can print a report of the day's follow-ups for all contacts. Each contact record starts on a new page.



To print the daily contact follow-ups form

1. Select **Menu > Contacts > Contacts**.

   Go.Data displays the Contacts list.
2. Click the **Quick actions** button
3. Select **Print daily follow-ups form**.
4. Complete the **Daily contact follow-ups form** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.

5. Click **Export**.

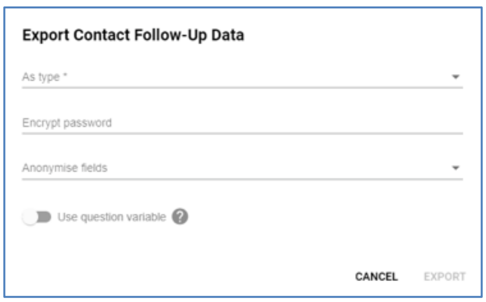
   Go.Data exports the data in the selected file type.

Exporting contact follow-up data

Go.Data allows you to export all contact follow-up data for the Follow-ups for related contacts list in view. You can also render anonymous one or more fields for the contact follow-up data. In this case, the anonymised fields display *** in lieu of the contact's information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export contact follow-up data

1. Select **Menu > Contacts > Daily Follow-ups**.

   Go.Data displays the Follow-ups for related contacts list.
2. Click the **Quick actions** button.
3. Select **Print follow-up list**.

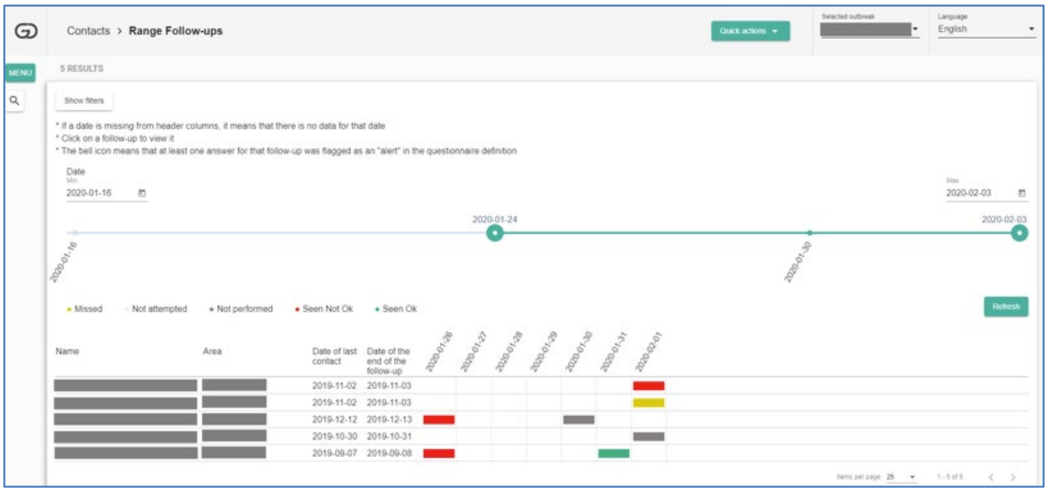
   Go.Data displays the Print follow-up list screen.
4. Complete the **Export case data** screen fields.

   - **As type**: Enter the file format type in which to export the report. Required.
   - **Encrypt password**: Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.
   - **Use question variable:** Select this toggle if you like to use the question variable as the column header.
5. Click **Export**.

   Go.Data exports the data in the selected file type.

Viewing the Range follow-ups dashboard

The Range follow-ups dashboard provides a visual overview of follow-up activities over a specified date range for all contacts under follow-up.



You can use filters to specify the records displayed by the Range follow-ups dashboard. The colour-coded Range follow-ups dashboard table allows you to quickly review the follow-up status for all records in the identified follow-up period. For more information, see Introduction to reference data.

The date slider provides a way for you to browse date ranges defined by the follow-up period for the active outbreak. In addition, you can view and modify individual follow-up records by clicking a cell within the Range follow-ups dashboard table. By default, the start date is the start date of the outbreak, and the slider range is defined based on number days to follow-up contacts in the outbreak.

A small bell icon indicates that a response recorded in the contact follow-up questionnaire has triggered an alert that requires additional investigation. For more information regarding the contact follow-up questionnaire form, see Questionnaire forms builder.

You can also export the Range follow-ups dashboard as a .pdf document to print a version of the dashboard for use in offline contact follow-up scenarios.

Range follow-ups dashboard field definitions

Item	Description
Area	The geographical location of the contact’s address.
Contact ID	A globally unique identifier created to track a record in Go.Data.
Date	The calendar date range selected for which to view all follow-ups.
Date of last contact	The most recent date you saw the contact for follow-up.
Name	The contact’s first and/or last name.

Item	Description
Team	The contact tracer team assigned to follow-up with the contact.
Date of the end of the follow-up	The calendar date selected as the end of the contact's follow-up period.

Range follow-ups dashboard actions

Item	Description
Quick Actions 	This button opens a menu from which you may choose additional actions related to the Range follow-up dashboard.
Show Filters	This button opens filters fields you can use to restrict the follow-up records Go.Data displays in the Range follow-ups dashboard.
Range follow-ups date slider 	These slider icons allow you to select the date range of follow-ups Go.Data displays in the Range follow-ups dashboard.

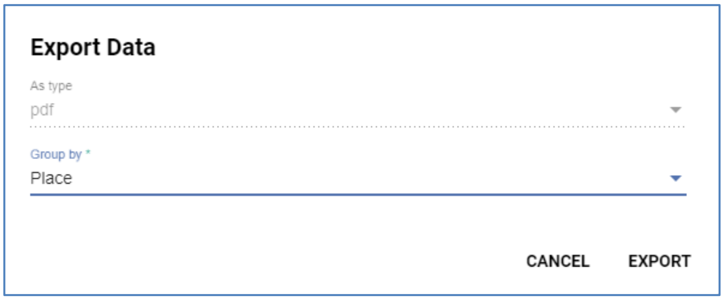
To view the Range follow-ups dashboard

1. Select **Menu > Contacts > Follow-up dashboard**.

   Go.Data displays the Range follow-ups dashboard.

Exporting the Range follow-ups dashboard

You can export and print a report of all follow-up information displayed by the Range follow-ups dashboard. This functionality provides you a way to review all follow-ups in offline scenarios.



By default, Go.Data exports the Range follow-ups dashboard information in .pdf format. When exporting the Range follow-ups dashboard, you can choose to organize the follow-ups grouped by their location (place), related case (case), or risk level (risk).

To export the Range follow-ups dashboard

1. Select **Menu > Contacts > Follow-up dashboard**.

   Go.Data displays the Range follow-ups dashboard.
2. Click the **Quick actions** button.
3. Select **Export Data**.
4. Go.Data displays the Export Data screen.
5. Complete the Export Data screen fields.

   - **As type**: Select a document format type for the generated follow-up list.
   - **Group by**: Select **Place** to organize follow-ups grouped by location. Select **Case** to organize follow-ups by related case. Select Risk to organize follow-ups by risk level.

6. Click **Export**.

   Go.Data exports the Range follow-ups dashboard.

Chapter 12 – Managing events

The Events feature provides epidemiologists and data managers with tools to manage events data.

An event allows you to track an outbreak as it relates to a specific community gathering. With an event, you can create and investigate relationships between contacts that had attended a common gathering.

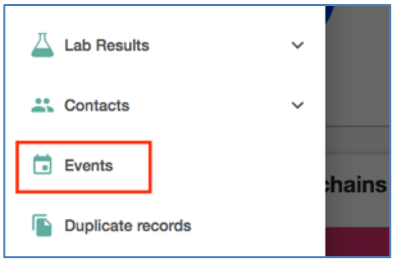
With the Events feature, you can easily add, modify, or delete events. In addition, events allow you to manage exposures and understand the relationships between contacts as they relate to a specific gathering.

Examples of typical events include:

- clinics
- concerts
- funerals
- markets
- mass gatherings
- schools
- sports.

Chapter Contents

Introduction to events



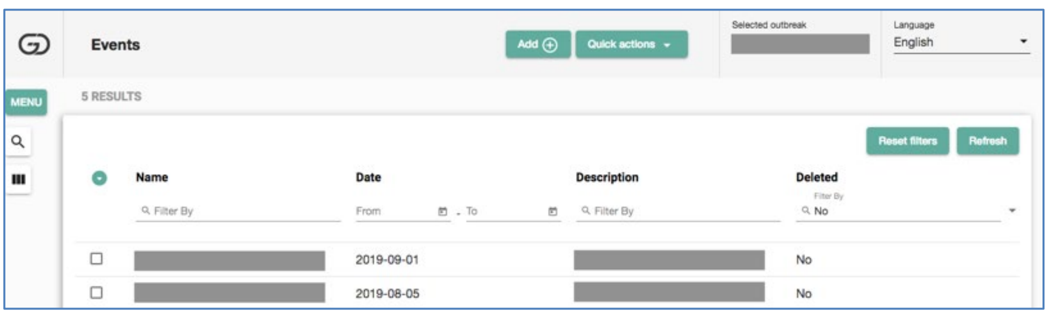
Events are critical for managing an outbreak in Go.Data. Actions on events start from either the Events list or Event details.

These views allow you to review event records for a specific outbreak, initiate actions related to events, view event reports, and import and export event information.

- **Events list**: a single location to view all event records for a designated outbreak.
- **Events details**: a single location to view individual event information for a specific outbreak event.

Events list

Viewing all events at one time allows you to review the individual details and address information for all events related to the active outbreak. The Events list provides a single location to view event records for a selected outbreak, to initiate actions for outbreak events, to see reports, view relationships related to events, and to import and export event information.



By default, the Events list shows all event records for the active outbreak. The event records include identifying details about the event and address information.

This list uses standard functionality as defined in Working with lists.

Events list field definitions

Item	Description
Address	The first line of the address or description to define the physical location of an event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Item	Description
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date	From defines the date an event started. To defines the date an event ended.
Deleted	Yes indicates a user has deleted the record. No indicates a user has not deleted the record.
Description	Used to define the significance of an event as it relates to an outbreak.
Name	A unique term or identifier used to describe an event.
Number of contacts	The number of contacts for associated with the event.
Number of exposures	The number of exposures for associated with the event.
Phone number	The telephone number associated with an event location.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record.

Events list actions

Item	Description
Add + Add	This button allows you to add a new event.
Quick Actions Quick actions	This button opens a menu from which you may choose additional actions related to the events.
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more events that you select by clicking the check box to the left of each event.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to an event selected.
Modify event	This hover action opens the event selected so you may update the event's information.
View event	This hover action opens the event selected so you may view the event's information.

To view all events

1. Select **Menu > Events**.

   Go.Data displays the Events list.

Event details

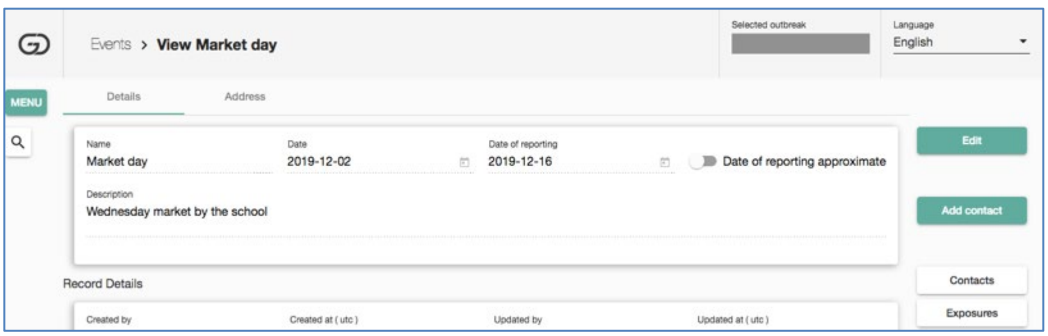
Event details provides one location to view the recorded details and address data for an event in Go.Data. In addition, you can complete many actions related to an event, such as edit an event, add a contact to an event, and view the event's existing relationships for the active outbreak in Go.Data.

The information on the Event details is used throughout Go.Data. The information is separated into these tabs:

- Details
- Address.

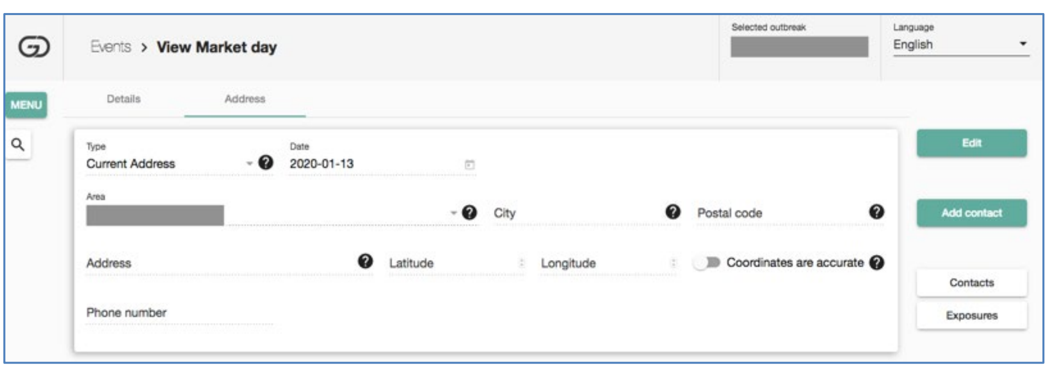
Details tab

The details tab includes fields for an event's identifying and reporting information.



Address tab

The address tab includes sections used to locate events, including address information. Addresses can be street addresses, latitude and longitude, or informal (for example, the market in the town square).



To view an event

1. Select **Menu > Events**.

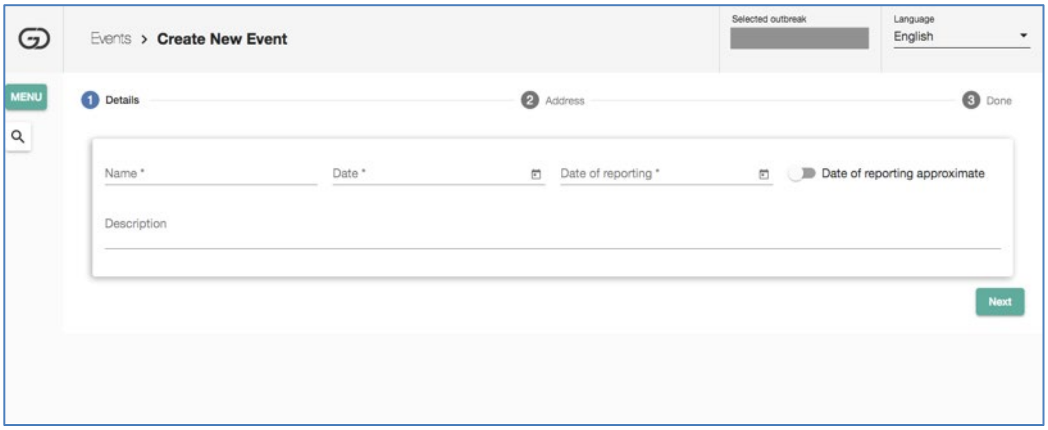
   Go.Data displays the Events list.

2. Hover over an event and click the **View event** icon.

   Go.Data displays Event details.

Adding or modifying events

You can add an event to Go.Data any time an outbreak is active. An event record tracks the details, address, and contact and exposure relationships of an event over time in relation to a specific outbreak. You can also modify the existing information for an event, for example, to update an event's address or change the name of an event.



Event details includes tabs that must be completed for new events or can be modified for existing events, including:

- Details
- Address.

For more information on the fields, see Event details.

For more information on the setting the active outbreak, see Changing the active outbreak.

To add or modify an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. To create a new event, click the **Add+** button. To modify an event that already exists, hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Complete the Details tab.
   - **Name**: Enter a unique term or identifier used to describe an event. Required.
   - **Date**: Enter the date the event started and ended. **From** defines the date an event started. **To** defines the date an event ended. Required.
   - **Date of reporting**: Choose the date you first became aware of the event. Required.
   - **Date of reporting approximate**: Select this toggle if the date of reporting is an estimate.
   - **Description**: Enter the significance of an event as it relates to an outbreak.
4. Click the **Next** button.
5. Complete the Address tab.
   - **Type**: Choose the status of the address you are reporting. Required.
   - **Date**: Enter the date you documented the address.
   - **Area**: Choose the general location where the event occurred.
   - **City**: Enter the city where the address is located.
   - **Postal code**: Enter the postal code of the location where the address is located.

- **Address**: Enter the first line of the address or description to define the physical location of an event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.
- **Latitude and Longitude**: Enter the geographical coordinates locating where an event took place.
- **Coordinates are accurate**: Toggle this option if the geographical coordinates of the address can be accurately used to locate the address, e.g. geocoordinates of the event.
- **Phone number**: Enter the telephone number associated with the address.

6. Click the **Next** button.

   Go.Data displays a data entry completed message.

7. Click the **Create event** button.

   Go.Data displays the Event details, and each tab includes the information provided.

Deleting events

Subject to your user permissions, you will be able to delete an event. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

WARNING	When you delete an event from Go.Data, you will no longer be able to track the event's data or the outbreak relationships for the specific event.

To delete an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Options** icon.
3. Click **Delete event**.

   Go.Data displays the Are you sure you want to delete this event? message.
4. Click **YES**.

   Go.Data deletes the event and displays the Event deleted message.

Working with an event's contacts

Events can be related to cases (probable, suspect, or confirmed), contacts, or other events. Individual events can have multiple contacts.

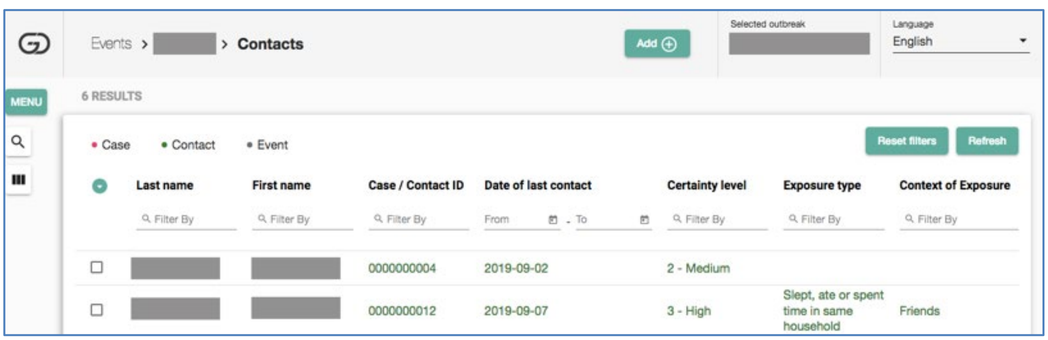
Viewing event contacts, either in a line list or individually, is an important part of outbreak management. For example, if you wished to share selected events, you could use the Events contacts list. If you wished to modify information about a particular an event, you could use the Event details for that particular event.

These views allow you to view event contact records within a selected outbreak, to initiate actions, to see reports, and to import and export information.

- **Event contacts list**: a single location to view all contact records related to an event.
- **Contact details**: a single location to view the event contact information for an individual record related to an event.

Event contacts list

Viewing all event contacts at one time allows you to review the individual details and address information for all events contacts related to the active outbreak event. You can use the Event contacts list to view cases, contacts, and events related to an existing outbreak event. In addition, you can use the Event contacts list to create new relationships for an event.



The Event contacts list provides a single location from which to:

- view contacts for a selected event;
- manage contact relationships by adding, updating, and deleting relationships individually and in bulk;
- share selected contacts with other events.

By default, the Event contacts list shows all event contacts for a specific event and are sorted ascending by last name.

This list uses standard functionality as defined in Working with lists.

Event contacts list field definitions

Item	Description
Case / Contact ID	The unique identifier of a case or contact.

Certainty level	The confidence level that the contact was exposed at the time of the event you are documenting.
Cluster	The specific cluster to which the event contact belongs.
Context of Exposure	The type of relationship between the event contact and the event you are documenting.
Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure.
Exposure duration	The length of time the exposure continuously occurred.
Exposure frequency	The numerical count of how often the exposure type occurred.
Exposure type	The description of how the case, contact, or event could have been exposed to the outbreak.
First name	The given name of the individual
Last name	The family name of the individual.
Relation detail	The relationship between the contact and a case or event that you are documenting.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Event contacts list actions

Item	Description
Add +	This button allows you to add a new contact.
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to one or more contacts that you select by clicking the check box to the left of each contact.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a contact selected.
Modify relationship	This hover action opens the contact selected so you may update the relationship information.
View relationship	This hover action opens the contact selected so you may view the relationship information.

To view all contacts for an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.

2. Hover over an event and click the **View event** icon.

   Go.Data displays Event details.
3. Click the **Contacts** button.

   Go.Data displays the Event contacts list with the currently associated cases or contacts.

NOTE	You can also go directly to the Event contacts list for an individual event from the Options context menu. Hover over an event for which you want to view the contacts and from the **Options** icon, click **See contacts**.

Event contact details

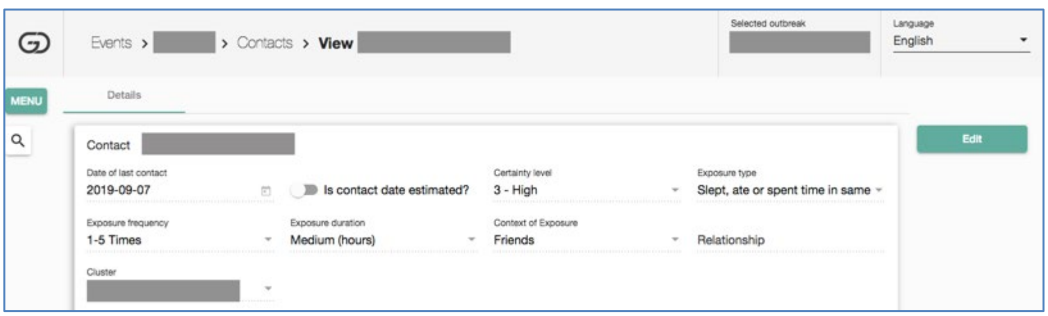
Event contact details provides a single location to view the recorded details for an event contact in Go.Data. In addition, you can complete many actions for an event contact, such as edit an event contact and view the existing event contact's individual contact, case, or event record. You can also click the hyperlinked name and see the full information. The information on the Contact details is used throughout Go.Data.

The information is found on the Details tab.

For more information, see Introduction to contacts.

Details tab

The details tab includes fields for determining how a contact is related to an event.



To view an individual contact for an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **View event** icon.

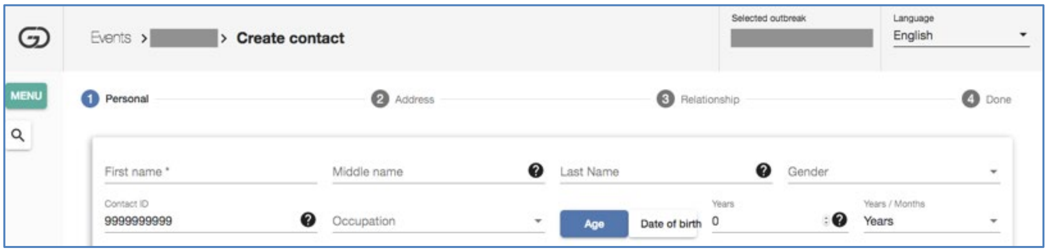
   Go.Data displays Event details.
3. Click the **Contacts** button.

   Go.Data displays the Event contacts list with currently associated cases and contacts.
4. Hover over an event and click the **Options** icon.
5. Click the **View relationship** icon.

   Go.Data displays the Individual contact relationship details.

Adding contacts and creating event contact relationships

You can add a new contact entry and simultaneously relate the contact to an existing event. You can use this functionality when you are investigating an event and need to add related contacts quickly for data recording and follow-up purposes



To add an outbreak contact while creating an event contact relationship, you must complete information on the following tabs:

- Personal
- Address
- Relationship.

To add a new contact with a relationship to an existing event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event to which to add the new contact and click the **Options** icon.
3. Click the **Add contact** button.
4. Complete the Personal tab.

   - **First name:** Enter the given name of the individual. Required.
   - **Middle name:** Enter the middle name of the individual.
   - **Last name:** Enter the family name of the individual.
   - **Gender:** Choose the gender of the individual.
   - **Contact ID:** Update the unique identifier created to track a contact if necessary.
   - **Occupation:** Choose the individual's field of work.
   - **Age:** Click the **Age** button to enter the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
   - **Date of birth:** Click the **Date of birth** button to open a **Date of birth** field with a calendar dropdown from which you may select the precise date. Go.Data calculates the individual's age.
   - **Years or Months**: Enter the individual's age based on the unit of measure in the **Years/Months** field. For months, you may only enter whole numbers up to 11 for people under 1 year of age.
   - **Years/Months:** Choose a unit of measure in years or in months for the individual's age.
   - **Pregnancy status**: Choose an option to reflect whether the contact is pregnant.
   - **Date of reporting:** Choose the date you first became aware of the individual.
   - **Date of reporting approximate:** Select this toggle if the date of reporting is an estimate.
   - **Risk level**: Choose the risk level.
   - **Reason**: Enter information about the rationale of your risk assessment.
   - **Add another vaccine**: Click this link to open a section in which to add vaccine information related to the individual.

- **Vaccine**: Required if entering vaccine information.
- **Vaccine date**: Choose the date the vaccine was given.
- **Vaccine status**: Required if entering vaccine information.
- **Add another document:** Click this link to open a section in which to add one or more additional personal identification documents related to the individual.
- **Document type:** Choose a document type including national ID cards, passports, and vaccination cards. Required.
- **Document number:** Enter the identification number from the document. Required.

5. Click the **Next** button
6. Complete the Address tab. If existing address information is available, you can delete the entire address block using the delete icon.

- **Type:** Choose the status of the address you are reporting. Required. For example, Current Address indicates the individual's primary address. You can have only one current address.
- **Date:** Enter the date you documented the address.
- **Area:** Choose the general location where the event occurred. Required.
- **City:** Enter the city where the address is located.
- **Postal code:** Enter the postal code of the location where the address is located.
- **Address**: Enter the first line of the address or description to define the physical location of the address. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.
- **Latitude and Longitude:** Enter the geographical coordinates locating where the address is located. If selected location has defined latitude and longitude data, these fields will automatically populate.
- **Coordinates are accurate:** Toggle this option if the geographical coordinates of the address can be accurately used to locate the address, e.g. geocoordinates of the event.
- **Phone number:** Enter the telephone number associated with the address.
- **Add another address:** Click this link to open a section in which to add one or more additional addresses of interest to the entry.

7. Click the **Next** button
8. Complete the Relationship tab.

- **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
- **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
- **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the event you are documenting. Required.
- **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
- **Exposure frequency:** Choose how often the exposure type occurred.
- **Exposure duration:** Choose how long the exposure continuously occurred.
- **Context of exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
- **Relationship:** Enter the relationship between the contact and the case or event as it relates to the individual record.
- **Cluster:** Choose the specific cluster the event contact belongs to.
- **Comment:** Enter notes about the record.

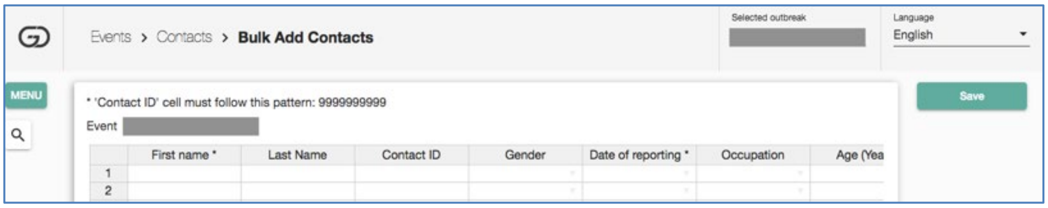
9. Click the **Next** button
10. Do one of the following:

- Click the **Create contact** button to add this contact to Go.Data and display the new Contact's details.

- Click the **Create and add another** button to add this contact to Go.Data and return to the **Create contact** screen to add another contact.

Adding contacts in bulk and creating event contact relationships

You can add multiple outbreak contacts and simultaneously relate all new contacts to an existing event in a spreadsheet-like user interface. For example, you can use this functionality when adding many new contacts when an outbreak occurs at a popular or high-volume event.



To add contacts in bulk to an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Options** icon.
3. Select Click **Bulk Add Contacts**.

   Go.Data displays a window with a table.
4. Complete the fields in the **Bulk Add Contacts** spreadsheet. Required fields are marked with an asterisk.
5. When you are done entering the information for each contact, click the **Save** button.

   Go.Data displays the event to which the contacts were assigned.

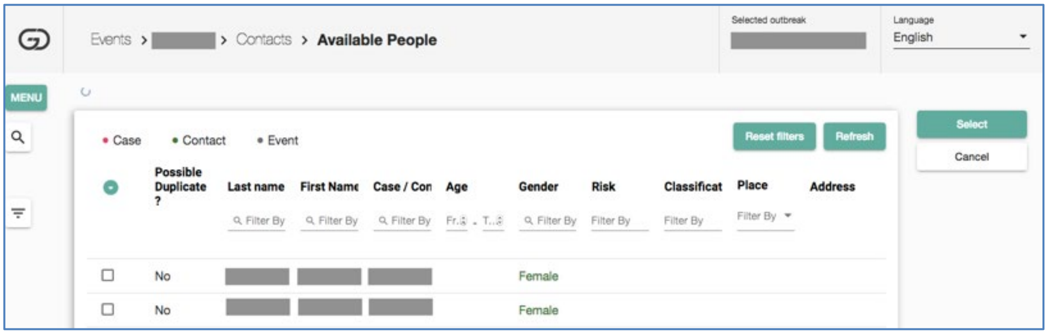
Adding or modifying contact relationships

You can add a relationship between existing Go.Data cases, contacts, or events and a specific event in Event contact details. An event contact relationship makes a connection between an existing record in Go.Data and an existing event for outbreak tracking and management purposes.

You can also modify at any time the existing information for an event contact relationship. For example, you may need to update address information.

Available people list

The Available people list provides a single location to select and view records in Go.Data to associate with an event and create an event contact relationship.



By default, the Available people list shows all case, contact, and event records for an outbreak. The records displayed by the Available people list contain identifying details, address, and epidemiological risk information.

You may select one or more records from the Available people list to create relationships with.

This list is the same format regardless of whether you are creating a contact relationship or an exposures relationship. The content available depends upon whether you are adding a contact relationship or an exposures relationship.

This list uses standard functionality as defined in Working with lists.

Available people list field definitions

Item	Description
Possible Duplicate?	Indicates if a case, contact, or event may already be related.
Last name	The family name of the individual.
First Name	The given name of the individual or the name of the event.
Case / Contact ID	The unique identifier of a case or contact.
Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.
Classification	Case classification
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Available people list actions

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to the records.

Item	Description
⌄	

To add an event contact relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Click the **Contacts** button.

   Go.Data displays the Event contacts list with currently associated cases and contacts.
4. Click the **Add+** button.

   Go.Data displays the Available people list.
5. Check the checkbox to the left for each case or contact.
6. Click the **Select** button.
7. Complete the Relationships tab for each relationship.

   - **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
   - **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
   - **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the exposure you are documenting. Required.
   - **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
   - **Exposure frequency:** Choose how often the exposure type occurred.
   - **Exposure duration:** Choose how long the exposure continuously occurred.
   - **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
   - **Relationship:** Enter the relationship between the contact and the case or event as it relates to the individual record.
   - **Cluster:** Choose the specific cluster to which the case belongs.
   - **Comment:** Enter notes about the record.

NOTE	If you are creating relationship to more than one individual at the same time you can use copy down icon next to each field in the relationships page to use same value for all records

8. Click the **Next** button.

   Go.Data displays the data entry completed message.
9. Click the **Create relationship** button.

   Go.Data displays a confirmation message and displays the Events contacts list for the original event with the new contacts added.

NOTE	You can also go directly to the Event contacts list from the Options context menu. Hover over an event for which you want to view the contacts and from the **Options** icon, click **See contacts**.

To modify an existing event contact relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Click the **Contacts** button.

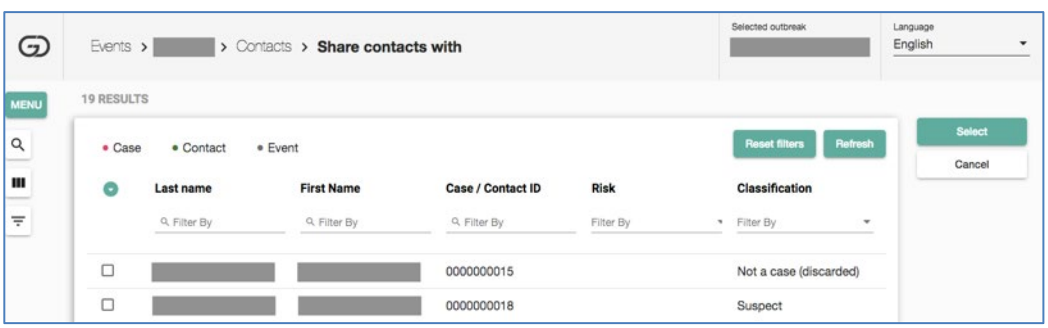
   Go.Data displays the Event contacts list with all related contacts.
4. Hover over an event contact and click the **Options** icon.
5. Click the **Modify relationship** icon.

   Go.Data displays the Relationship details.
6. Update the Details tab and click the **Save** button.

   Go.Data displays the relationship modified message.

Sharing selected contact relationships between events

You can copy contact relationships between events. For example, you might use this feature when one event has the same contact relationships as another event. You can share one or more relationships at one time. First, you select the record from which to copy the relationships, then choose the relationships, and finally choose the record to receive the relationships.



To share contact relationships between events

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over a case and click the **Modify event** icon.
3. Click the **Contacts** button.
4. Click the checkbox to the left of one or more relationships to copy.
5. Click the **Bulk Actions** button and choose **Share selected contacts**.

   Go.Data displays a Share contacts with list.

6. From the records displayed, click the checkbox to the left of one or more records to receive the copied relationships.
7. Click the **Select** button.
8. Update the Relationships tab and click the **Next** button.

   Go.Data displays a data entry completed message.
9. Click the **Create Relationship** button.

   Go.Data copies the relationships to the receiving record(s) and displays the Events list for the original record.

Deleting event contact relationships

At any point in the outbreak investigation, you may want to delete one or more event contact relationships. When you delete an event contact relationship from Go.Data, you will no longer be able to track the relationship between a case, contact, or event and a specific event.

You cannot delete a contact's last relationship with a case or event.

To delete an event contact relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Click the **Contacts** button.

   Go.Data displays the Event contacts list with all related contacts.
4. Click the checkbox to the left of one or more relationships to delete.
5. Click the **Bulk Actions** button and click **Deleted selected relationships**.

   Go.Data displays a confirmation message.
6. Click **YES**.

   The relationship is deleted.

Working with an event’s exposures

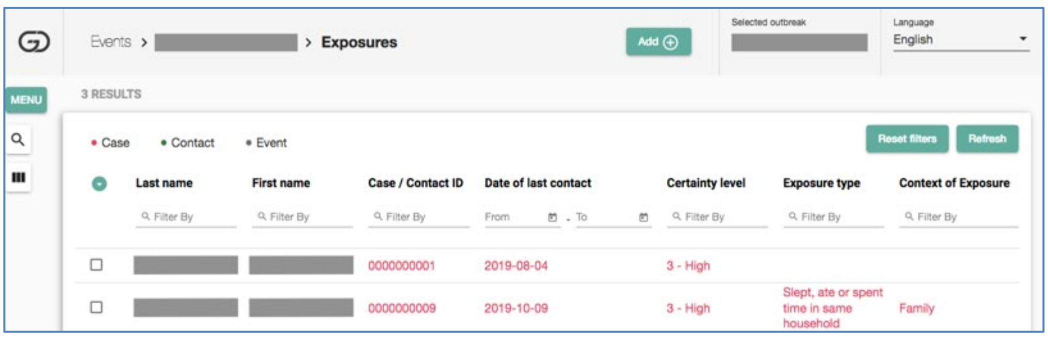
You can use Go.Data to document exposures that occur related to a specific event. With event exposures, you can view the progression of an outbreak through cases, contacts, and events that were present during specific event..

These views allow you to view exposures that occurred at a specific outbreak event, create event exposure relationships, and modify existing event exposure relationships.

- **Event exposures list** – a single location to view all exposure records related to an event.
- **Event exposure details** – a single location to view the event exposure records for an individual record related to an event.

Event exposures list

Viewing all event exposures at one time allows you to review the individual details and address information for all events exposures related to the active outbreak event. You can use the Event exposures list to view all outbreak exposures related to a specific event.



The Event exposures list provides a single location from which to:

- view exposures for a selected event;
- manage exposures relationships by adding, updating, and deleting exposures individually and in bulk; and
- share selected exposures.

By default, the Event exposures list shows all event exposures for a particular event. The exposure records include identifying details about the contact and address information.

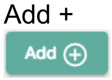
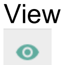
This list uses standard functionality as defined in Working with lists.

Event exposures list field definitions

Item	Description
Case / Contact ID	The unique identifier of a case or contact.
Certainty level	The confidence level that the contact was exposed at the time of the event you are documenting.
Cluster	The specific cluster to which the contact belongs.
Context of Exposure	The type of relationship between the event contact and the event you are documenting.

Created at (utc)	The time (UTC) the Created by user added the record to Go.Data.
Created by	The name of the user who added the record to Go.Data.
Date of last contact	The last date of possible exposure.
Exposure duration	The length of time the exposure continuously occurred.
Exposure frequency	The numerical count of how often the exposure type occurred.
Exposure type	The description of how the case, contact, or event could have been exposed to the outbreak.
First name	The given name of a case or contact. Can also display the name of an event.
Last name	The family name of the individual.
Relation detail	The relationship between the event contact as it relates to the event you are documenting.
Updated at (utc)	The time (UTC) the Updated by user saved the record after modifying the data.
Updated by	The name of the user who last modified the record data.

Event exposures list actions

Item	Description
Add + 	This button allows you to add a new exposure.
Bulk Actions 	The dropdown arrow opens a menu from which you may choose additional actions related to one or more exposures that you select by clicking the check box to the left of each exposure.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to an exposure selected.
Modify relationship 	This hover action opens the exposure selected so you may update the relationship information.
View relationship 	This hover action opens the exposure selected so you may view the relationship information.

To view all exposures for an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **View event** icon.

   Go.Data displays Event details.
3. Click the **Exposures** button.

   Go.Data displays the Exposures list with all related exposures.

NOTE	You can also go directly to the Event exposures list for an individual event from the Options context menu. Hover over an event for which you want to view the contacts and from the **Options** icon, click **See exposures**.

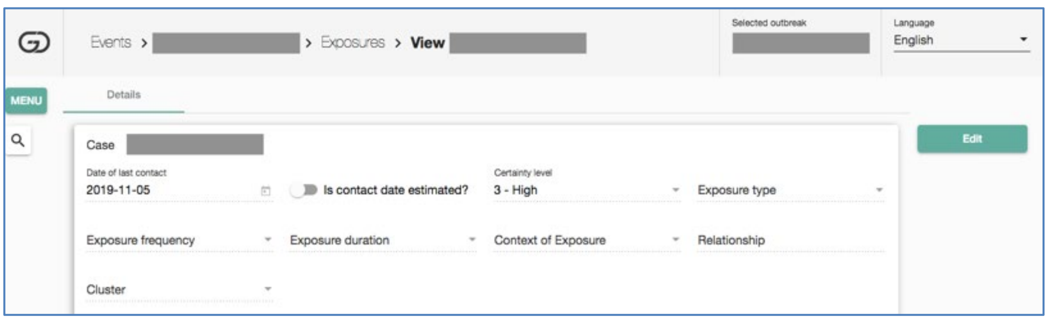
Event exposure details

Event exposure details provides one location to view how specific cases, contacts, or events have exposures relating to an existing outbreak event. You can also click the hyperlinked name and see the full case information.

Use the Event exposure details to view cases, contacts, and events with exposures related to an existing outbreak event. In addition, you can use the Event exposure details to create new relationships for an outbreak event.

Details tab

The details tab includes fields for determining how an exposure is related to an event.



To view an individual exposure for an event

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **View event** icon.

   Go.Data displays Event details.
3. Click the **Exposures** button.

   Go.Data displays the Event exposures list with all related exposures.
4. Hover over an event and click the **View relationship** button.

   Go.Data displays the relationship information.

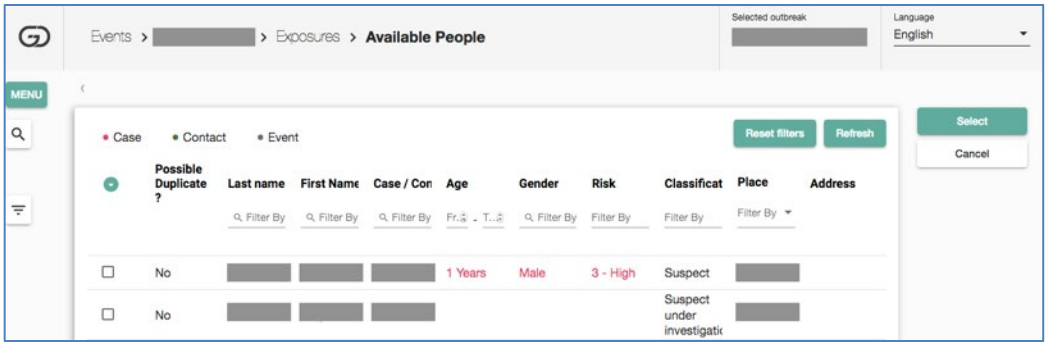
Adding or modifying event exposure relationships

You can add an exposure that occurred between existing Go.Data cases, contacts, or events and a specific event in Event exposure details. An event exposure relationship makes a connection between an existing record in Go.Data and an existing event for outbreak tracking and management purposes.

You can also modify the existing information for an event exposure relationship. For example, you may need to update address information or exposure duration.

Available people list

The Available people list provides a single location to select and view records in Go.Data to associate with an event and create an event exposure relationship.



By default, the Available people list shows all case, contact, and event records for an outbreak. The records displayed by the Available people list contains identifying details about a record, address, and epidemiological risk information.

This list is the same format regardless of whether you are creating a contact relationship or an exposures relationship. The content available depends upon whether you are adding a contact relationship or an exposures relationship.

This list uses standard functionality as defined in Working with lists.

Available people list field definitions

Item	Description
Possible Duplicate?	Indicates if a case, contact, or event may already be related.
Last name	The family name of the individual.
First Name	The given name of the individual or the name of the event.
Case / Contact ID	The unique identifier of a case or contact.
Age	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.
Classification	Case classification.
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of an individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

Available people list actions

Item	Description
Bulk Actions	The dropdown arrow opens a menu from which you may choose additional actions related to the records.

To add an event exposure relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Click the **Exposures** button.

   Go.Data displays the Event exposures list with all related exposures.
4. Click the **Add+** button.

   Go.Data displays the Available people list.
5. Check the checkbox for the case, contact, or event to create an event exposure relationship.
6. Click the **Select** button.
7. Complete the Relationships tab.

   - **Date of last contact:** Enter the last date of possible exposure between a contact and a case or event. Required.
   - **Is contact date estimated?:** Select this toggle if the date of last contact is an estimate.
   - **Certainty level:** Choose your confidence level that the individual or event was exposed at the time of the exposure you are documenting. Required.
   - **Exposure type:** Choose how the case, contact, or event could have been exposed to the outbreak.
   - **Exposure frequency:** Choose how often the exposure type occurred.
   - **Exposure duration:** Choose how long the exposure continuously occurred.
   - **Context of Exposure:** Choose the circumstances between the case, contact, or event and the exposure that you are documenting.
   - **Relationship:** Enter the relationship between the contact and the case or event as it relates to the individual record.
   - **Cluster:** Choose the specific cluster to which the case belongs.
   - **Comment:** Enter notes about the record.

8. Click the **Next** button.

   Go.Data displays the data entry completed message.
9. Click the **Create relationship** button.

   Go.Data displays a confirmation message and displays the Event exposures list for the original case with the new exposures added.

To modify an event exposure relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.

3. Click the **Exposures** button.

   Go.Data displays the Event exposures list with all related exposures.
4. Hover over a record and click the **Modify relationship** icon.
5. Update the Details tab and click the **Save** button.

   Go.Data displays the relationship modified message.

Deleting event exposure relationships

At any point in the outbreak investigation, you may wish to delete an event exposure relationship. When you delete an event exposure relationship from Go.Data, you will no longer be able to track the relationship between a case, contact, or event record and the exposure that occurred at a specific event.

You cannot delete an exposure's last relationship with a case or event.

To delete one or more event exposure relationships

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **Modify event** icon.

   Go.Data displays Event details.
3. Click the **Exposures** button.

   Go.Data displays the Event exposures list with all related exposures.
4. Click the checkbox to the left of one or more relationships to delete.
5. Click the **Bulk Actions** button and click **Deleted selected relationships**.

   Go.Data displays a confirmation message.
6. Click **YES** to confirm.

   The relationship is deleted.

Reversing persons in exposure relationships

While investigating an event exposure, you may determine that the transmission of the disease occurred oppositely from how you originally recorded the relationship in Go.Data. For example, instead of Case A being exposed to Case B, Case B was actually exposed to Case A.

Instead of creating a new relationship in Go.Data, the system provides simple functionality to reverse the direction of the exposure relationship. This feature is only available between a case and another case or an event

NOTE	Go.Data will not allow you to reverse the exposure relationship if one of the relationship's records is a contact record. The system's logic dictates that contacts are exposed to a case, not vice versa.

To reverse an event exposure relationship

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Hover over an event and click the **View event** icon.

   Go.Data displays Event details.
3. Click the **Exposures** button.

   Go.Data displays the Event exposures list.
4. Hover over an exposure and click the **Modify relationship** icon.

   Go.Data displays the Event exposure details.
5. Click the **Reverse persons** button.

   Go.Data displays a **reverse persons confirmation** message.
6. Click **YES**.

   Go.Data reverses the direction of the relationship.

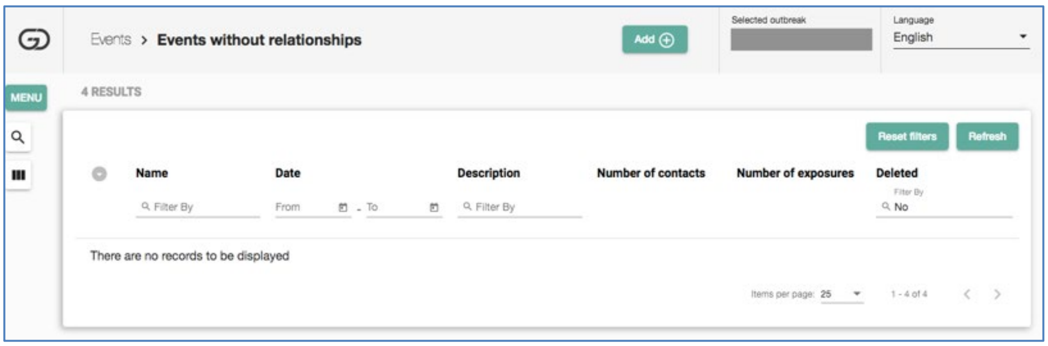
NOTE	You can also navigate to the Event exposures list by selecting **Menu > Events > Options icon > See exposures**.

Viewing events without relationships

When investigating outbreak data, you can view a report of events that do not contain contact or exposure relationships. You can use this report when you are determining the relevance on an event to an outbreak or if you are trying to identify event contact and event exposure relationships you need to investigate further.

If there are no existing events without existing relationships in Go.Data, the report displays, “There are no records to be displayed.”

In addition, you can use the **Add+** button to create a new event from the Events without relationships list.



To see events without relationships

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Click the **Quick actions** button.
3. Click **See events without relationships**.

   Go.Data displays the Events without relationships report.

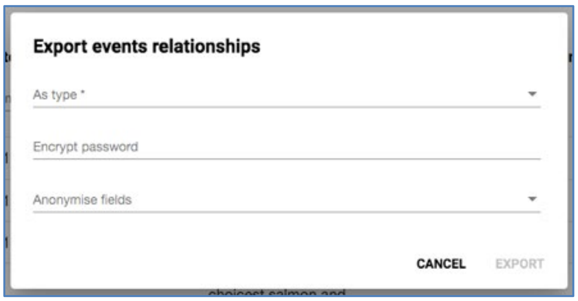
Exporting event relationships

Go.Data allows you to export a report of all relationships for an outbreak.

You can export data in a list for all event contact and event exposure relationships for an outbreak. You can also render anonymous one or more fields for the records. In this case, the anonymised fields display *** in lieu of the information.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.



To export all event relationships

1. Select **Menu > Events**.

   Go.Data displays the Events list.
2. Click the **Quick actions** button.
3. Select **Export event relationships**.

   The Export events relationships screen displays.
4. Complete the **Export events relationships** screen fields.

   - **As type:** Enter the file format type in which to export the report. Required.
   - **Encrypt password:** Enter a password that users will need to supply to import the exported file into Go.Data.
   - **Anonymise fields:** Choose one or more fields to anonymise before exporting the records.

5. Click **Export**.

   Go.Data exports the data in the selected file type.

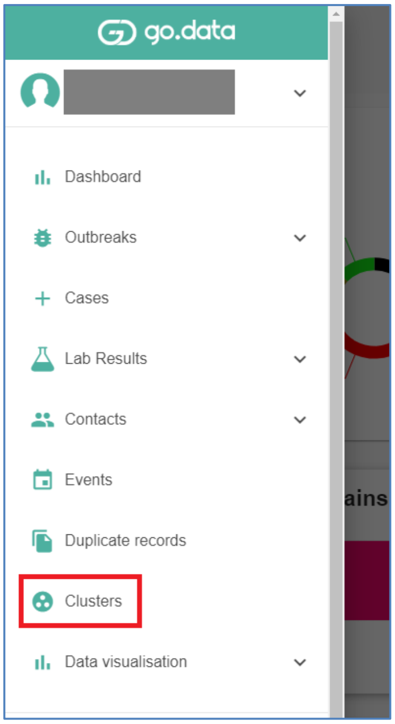
Chapter 13 – Working with clusters

Go.Data provides the functionality for you to group together cases, contacts, and events with existing relationships into clusters. By using clusters, you can further describe links between a set of transmissions that you believe are linked by some significant factor.

In Go.Data, you are only required to define a name and description when creating a cluster, which allows you to track links between cases, contact, and events for any pattern that arises during the outbreak investigation process.

Chapter Contents

Introduction to clusters



Clusters provide a way to further describe relationships between exiting contact and exposure relationships in Go.Data.

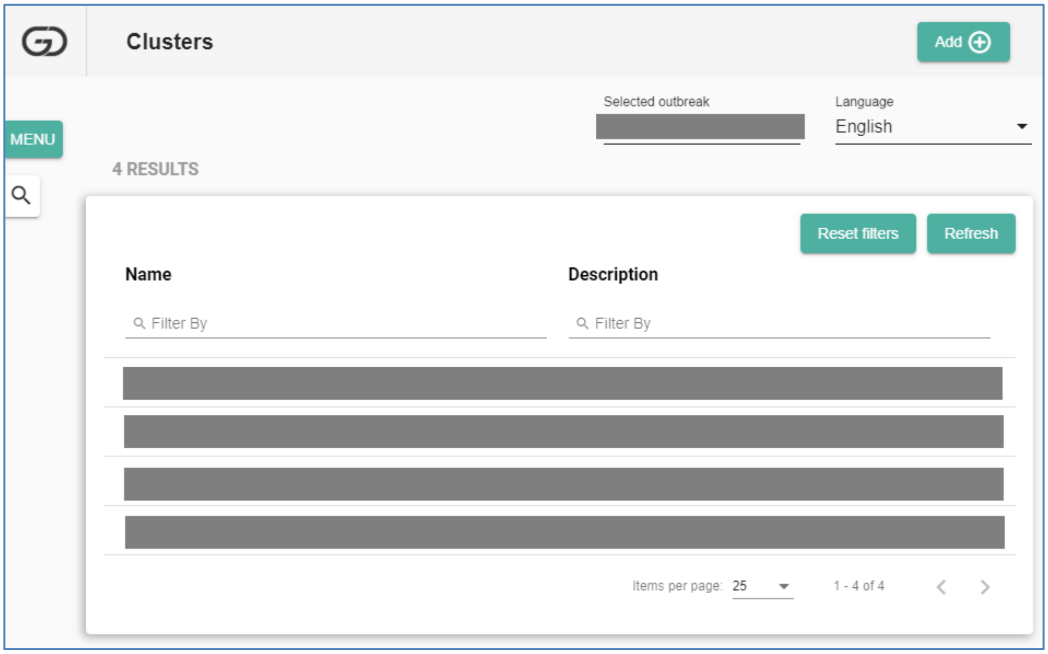
While the Clusters lists allows you to view relationship information and create new clusters, you add cluster information through Case details, Contact details, and Event details in Go.Data.

- **Clusters list**: A single location to view all cluster records for a designated outbreak.
- **Cluster details**: A single location to view the cluster relationship records for a specific outbreak.
- **People list**: A single location to view the individual records within a cluster.

For more information on creating cluster relationships, see Case details, Contact details, or Event details.

Clusters list

From the Clusters list, you can view all clusters within an outbreak or choose individual clusters to view more relationship details or initiate actions.



By default, the Clusters list shows all cluster records for the active outbreak. The cluster records include a name and a description.

This list uses standard functionality as defined in Working with lists.

Clusters list field definitions

Item	Description
Name	The name or unique identifier used to describe a cluster. Required.
Description	The significance of a cluster as it relates to an outbreak.

Clusters list actions

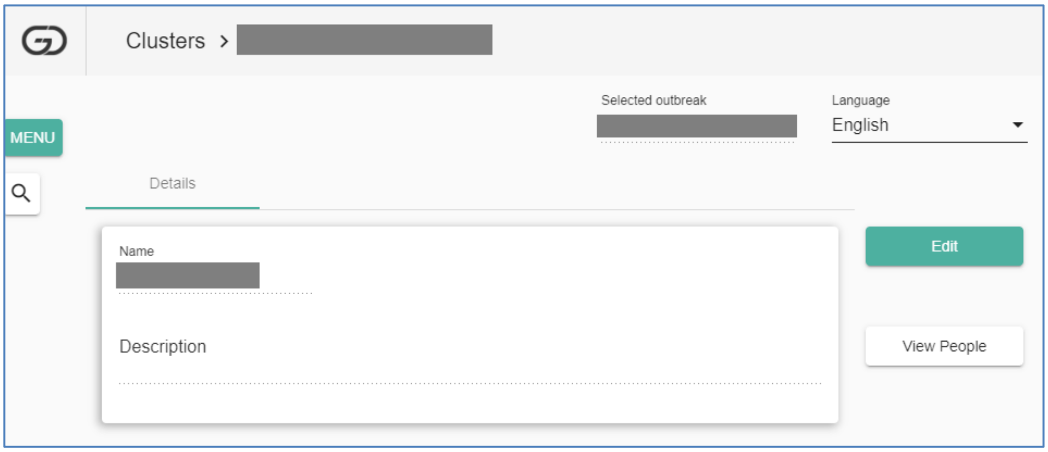
Item	Description
Add +	This button allows you to add a new cluster.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to clusters.
Modify cluster	This hover action opens the cluster selected so you may update the cluster's information.
View cluster	This hover action opens the cluster selected so you may view the cluster's information.

To view all clusters

1. Select **Menu > Clusters**.

   Go.Data displays the Clusters list.

Cluster details



Cluster details allows you to review the recorded name and description of a specific cluster. You can also initiate actions such as modify an existing cluster or view the People List.

Cluster details contains the name and description of a specific cluster. In addition, from Cluster details, you can edit the recorded data with the **Edit** button or view the cases, contacts, and events within a cluster with the **View People** button.

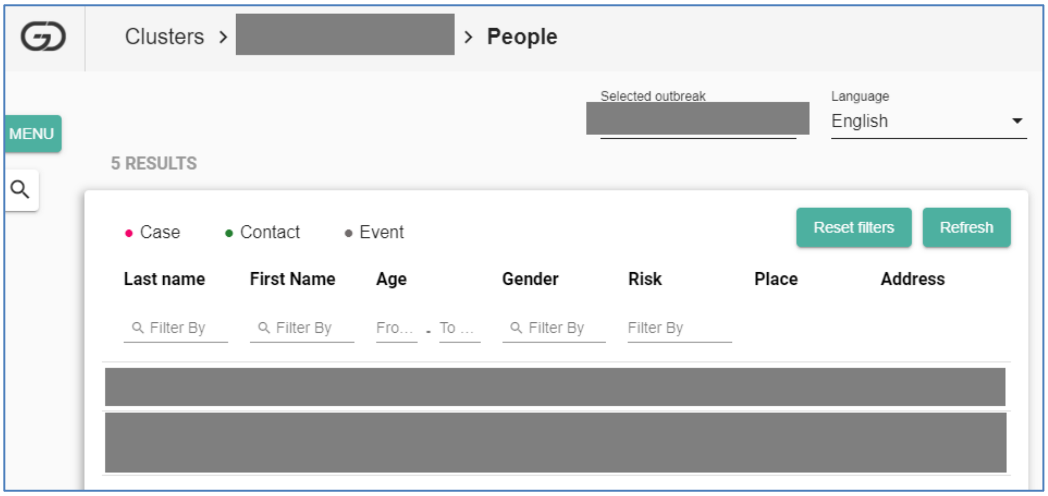
To view a cluster

1. Select **Menu > Clusters**.

   Go.Data displays the Clusters list.
2. Hover over a cluster and click the **View cluster** icon.

   Go.Data displays Cluster details.

People list



From the People list, you can view the existing records that make up a cluster or initiate actions such as view or modify the case, contact, or event.

By default, the People list displays all cases, contacts, and events within the selected cluster.

This list uses standard functionality as defined in Working with lists.

People list field definitions

Item	Description
Last name	The family name of the individual.
First name	The given name of the individual or the name of the event.
Ages	The exact or approximate age of the individual with the individual's age in months for infants under 1 year, years for people over 1 year of age, or no units of time.
Gender	The gender of the individual.
Risk	The likelihood of infection.
Place	The general location of the individual or event.
Address	First line of the address or description to define the physical location of an individual or event. Formats can include street locations or geographical information, for example, third building from the corner of southeast corner of the market.

To view the People list

1. Select **Menu > Clusters**.

   Go.Data displays the Clusters list.
2. Hover over a cluster and click the **View cluster** icon.

   Go.Data displays Cluster details.

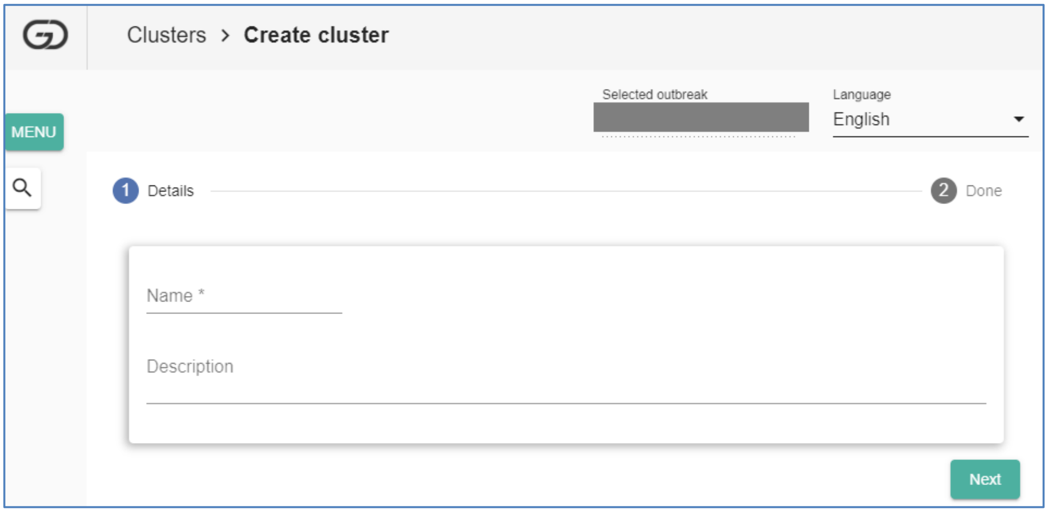
3. Click the **View people** button.

   Go.Data displays the People list.

NOTE	You can also go directly to the View people list for an individual case from the Options context menu. Hover over a cluster for which you want to view the people and from the **Options** icon, click **View people**.

Adding and modifying clusters

You can create a cluster in Go.Data at any time during an outbreak. A cluster record helps you further describe relationships between existing contact and exposure relationships.



You can also modify the existing information for a cluster, for example, to change the name or the description.

To add or modify a cluster

1. Select **Menu > Clusters**.

   Go.Data displays the Clusters list.
2. To add a new cluster, to click the **Add+** button. To modify a cluster that already exists, hover over a cluster and click the **Modify cluster** icon.

   Go.Data displays Cluster details.
3. Complete the Details tab:

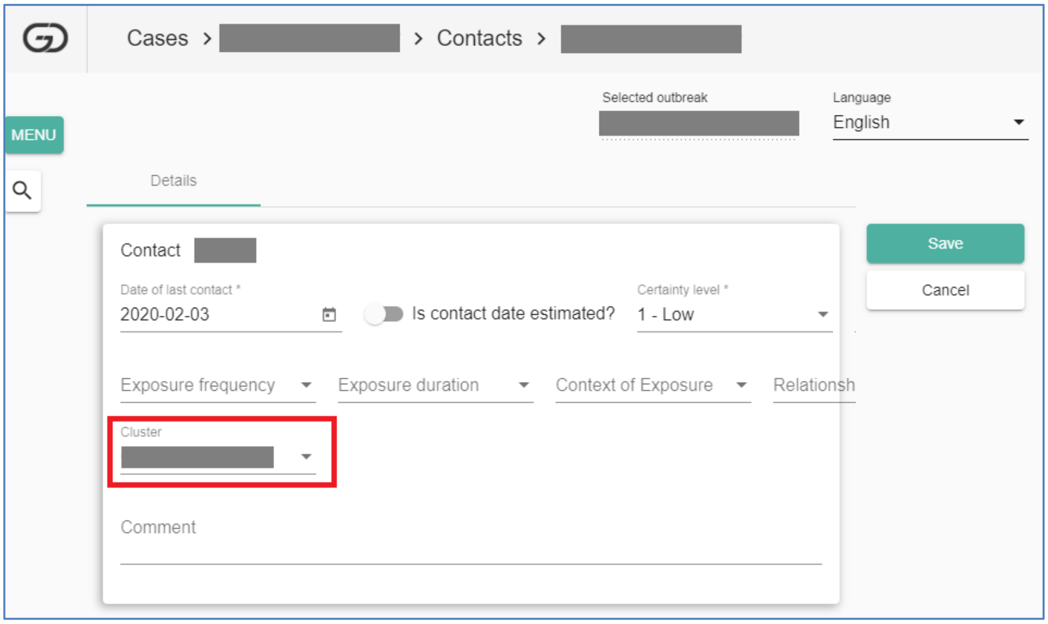
   - **Name**: Enter a name to identify the cluster. Required.
   - **Description**: Enter a description to describe the significance of the cluster.
4. Click the **Next** button.

   Go.Data displays a data entry completed message.
5. Click the **Create cluster** button.

   Go.Data displays the cluster details.

Creating cluster relationships

Creating clusters in Go.Data allows you to create a new relationship between existing contact or exposure relationships in Go.Data.



For example, you know Case A and Case B are related, and you know Case X and Case Y are related. You also know that all four cases are related. In this situation, you can create a cluster to track the relationship between cases A, B, X, and Y.

Unlike contact and exposure relationships in Go.Data, you cannot create cluster relationships through the Cluster list. Instead, you can add cases, contacts, and events to a cluster through the specific record lists in Go.Data.

NOTE	Before creating cluster relationships, you must have a case, contact, or event in Go.Data with a pre-existing contact or exposure relationship. In addition, you must add a cluster before creating a cluster relationship. For more information, see Adding and modifying clusters.

To create a cluster relationship

1. Click the **Menu** button and select one of the following:

    - **Cases**
    - **Contacts**
    - **Events**

    Go.Data displays an All records list.

2. Hover over a record with a pre-existing contact or exposure relationship and click the **View** icon.

    Go.Data displays an Individual records list.

3. Click the **Contacts** or **Exposures** button to view the existing relationship you would like to add to a cluster.

   Go.Data displays a Contacts or Exposures list.

4. Hover over a record and click the **View relationship** icon.

   Go.Data displays an Individual record list.

5. Click the **Edit** button.
6. Select the cluster you would like to add the relationship to from the Cluster drop-down list.
7. Click the **Save** button.

   Go.Data displays a relationship modified message.

Deleting clusters

Subject to your user permissions, you will be able to delete a cluster. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

When you delete a cluster in Go.Data, you will remove the epidemiological links created between the cases, contacts, and events within the cluster.

To delete a cluster

1. Select **Menu > Clusters**.

   Go.Data displays the Clusters List.
2. Hover over a cluster and click the **Options** icon.
3. Select **Delete cluster**.

   Go.Data displays a delete confirmation message.
4. Click **YES**.

   Go.Data deletes the cluster and displays the Cluster deleted message.

Chapter 14 – Using reports

Reporting in Go.Data allows you to monitor aspects of Go.Data for one or more outbreaks. In particular, people who are overseeing a particular outbreak will find tools, such as:

- Duplicate records
- Audit logs.

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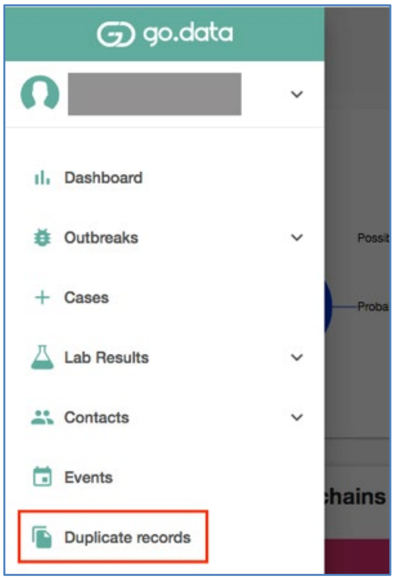
Working with duplicate records reports

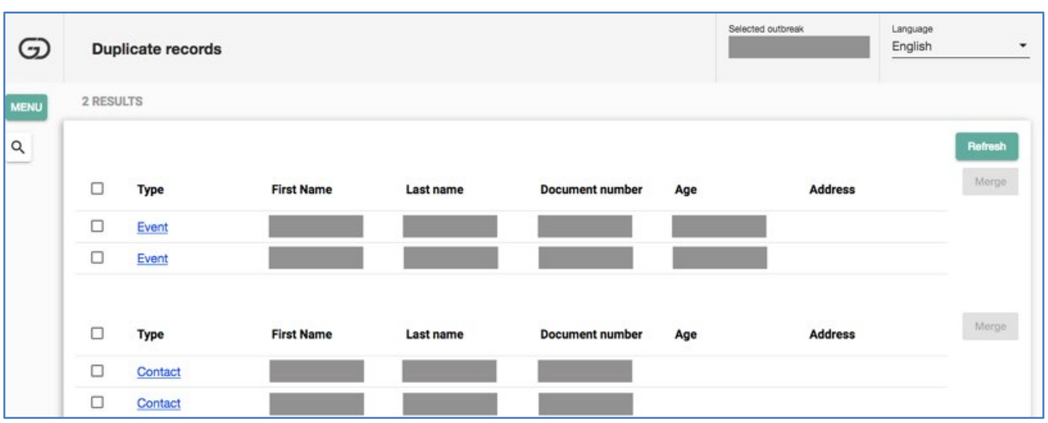


When teams record many cases, contacts, or events over the course of an outbreak, it is very likely that records will be duplicated, either exactly or quite closely. In the duplicate records feature, Go.Data reviews the records in the selected outbreak and suggests records likely to be doubles of each other.

After you review these suggestions, you can then determine whether they are in fact the same record and should be merged or whether they should remain separate. You maintain control over the data at all times.

Duplicate records list

The Duplicate records list shows records that may be the same for the selected outbreak.



Potential duplicate records are grouped by type. For example, potentially duplicated cases are separated from potentially duplicated events.

You can click on the hyperlinked record type for each record to review the detailed records and determine whether they are, in fact, duplicates.

Duplicate records list field definitions

Item	Description
Type	The type of potential duplicate record, which is a hyperlink to the record.
First name	The given name of the individual or event in the record.
Last name	The family name of the individual or event in the record.
Document number	The identification number from the document.
Age	The individual's age in months for infants under 1 year or in years for people over 1 year of age.
Address	First line of the address or description that defines the physical location.

Duplicate records list actions

Item	Description
Merge 	This button allows you to merge the selected duplicate records.

To view a duplicate records report

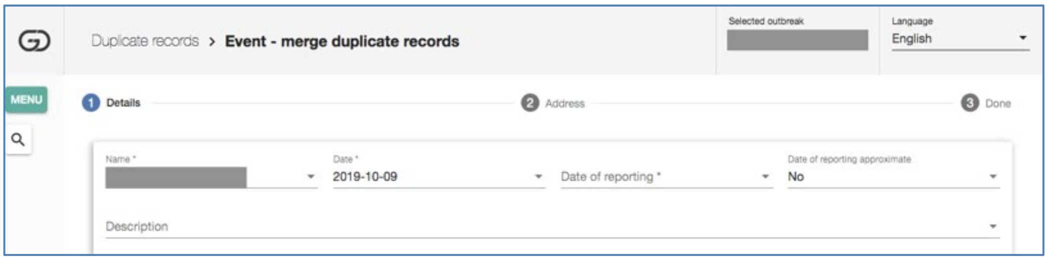
1. Select **Menu > Duplicate records**.

   Go.Data displays the Duplicate records list.

Merging duplicate records

After you have reviewed two or more records and determined that they are duplicates of each other, you can merge them. You may only merge records of the same type and in the same outbreak. The Merge button will not available until you have chosen two or more records of the same type to merge.

After you have started the merge process, you will be given an opportunity to review and edit the merged record before you save the newly merged record.



For example, two events are identical except the date of reporting is one day off. You will be able to choose which of the dates is the most accurate date.

WARNING	A merge is irreversible, so be sure you wish to combine the records permanently before clicking the **Merge cases, Merge contacts**, or **Merge events** button at the end!

To merge duplicate records

1. Select **Menu > Duplicate records**.

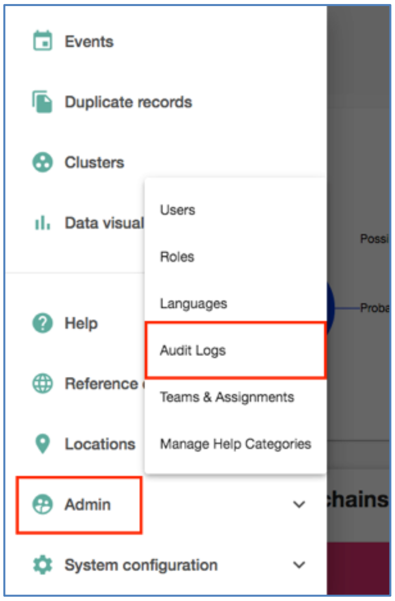
   Go.Data displays the Duplicate records list.
2. Check the boxes to the left of the records you wish to merge.
3. Click the **Merge** button.

   Go.Data combines the records into a new combined individual record for you to review.
4. Review the contents of the combined individual record and edit if necessary.
5. When you have reviewed and edited the tabs as necessary, click the **Next** button.
6. When you are certain you wish to merge, click the **Merge cases, Merge contacts**, or **Merge events** button as appropriate. There is no un-doing the merge after you click this button.

   Go.Data displays a records merged message, and the Duplicate records list no longer displays the records you merged.

Working with audit logs

Viewing the audit log for outbreaks allows authorised users to review additions, modifications or deletions to records, as well as many other activities, such as syncing records. The audit function is designed to provide read-only traceability on how information evolves over time.



The Audit logs shows the record of all actions for all outbreaks and includes the user that made the changes and at what date and time. Changes recorded in the audit log are stored in JSON.

Go.Data stores the entire history permanently. For example, deleting a record is a “soft” delete only, and the record is not permanently deleted. This action is recorded in the audit log.

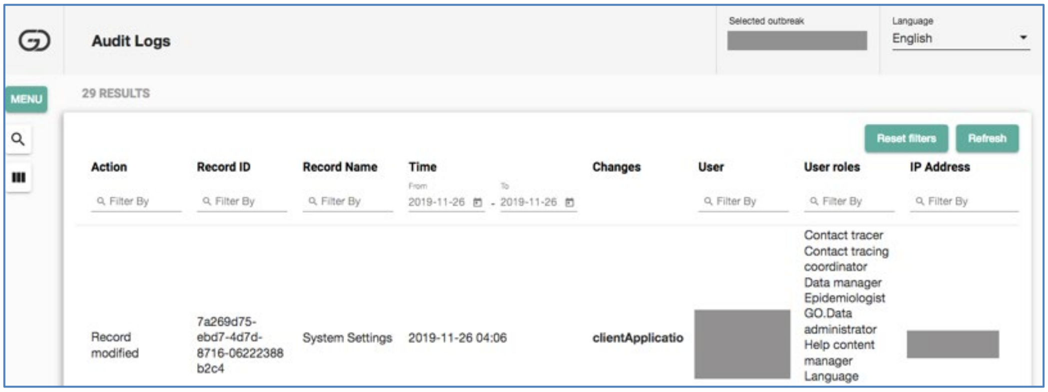
Although not accessible through the Go.Data interface, an outbreak can be recreated at any given point in time if it should be required. Please contact the Go.Data team if this action is necessary.

To avoid data inconsistency, changes cannot be rolled back from the audit log. For more information on rolling back, see Backing up and restoring.

To debug installation issues, you may also wish to review the separate installation audit logs that Go.Data writes in the installation location. For more information on installation issues, see Where do I find installation files??

Audit logs list

The Audit logs list is read-only, so other than filtering for different criteria, no record-specific steps are available from the audit log.



As with any Go.Data list, you can filter records by one or more categories and sort by any category.

By default, records are shown for the current day. When you include additional days, they are displayed in reverse-chronological order by default, with the most recent action at the top of the log.

Audit logs list field definitions

Item	Description
Action	A brief description of the action taken on the record. For example, New record or Record modified. You can filter by new, modified, removed or restored records.
Changes	The change made to the record. This information varies depending on the type of change. For example, sync shows the start date and time, status, sync server URL, and record ID.
IP address	The IP address of the user who added, modified, or deleted the record data.
Record ID	The system identification number of the record.
Record name	The human-readable name of the record. For example, Sync log or Database action log. You can filter by user, role, location, team, audit log, system settings, sync log, database action log, database export log, template, outbreak, case, contact, reference data, follow up, cluster, help category, lab result, help item, relationship, access token, person, language, language token, event, icon, backup or file attachment.
Time	The time (UTC) at which the record was added, modified, or deleted.
User	The name of the user who added, modified, or deleted the record data. You can filter by individual user.
User roles	One or more user roles held by the user who added, modified, or deleted the record data.

To view the audit log

1. Select **Menu > Admin > Audit logs**.

   Go.Data displays the Audit logs list.

Chapter 15 – Working with data visualisations

After you have created cases, contacts, and events and the contact and exposure relationships between them with the direction and certainty level of the transmission entered, Go.Data can visualise the network as a chain of transmission graph.

Go.Data can create data visualisations in the following formats:

- Chains of transmission graphs
- Chains of transmissions bars
- Chains of transmission lists
- Case count maps

Furthermore, you can configure data visualisations to change the colours, shapes, icons, and formats of the elements that appear.

Finally, you can export Data visualisations to a PDF file to a number of separate sheets, so that the pages can be printed and assembled in a large hard copy format.

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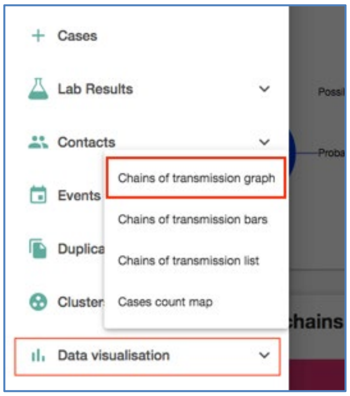
Introduction to Chains of transmission graphs



Within Go.Data, you have the ability to create multiple types of Chains of transmission graphs. These graphs display the relationships between cases, contacts, and events for a specific outbreak.

From the Chains of transmission graphs, you can complete many actions related to data visualisations, such as configuring Chains of transmission, editing the type of data visualisation displayed, and exporting Chains of transmission graphs to a PDF.

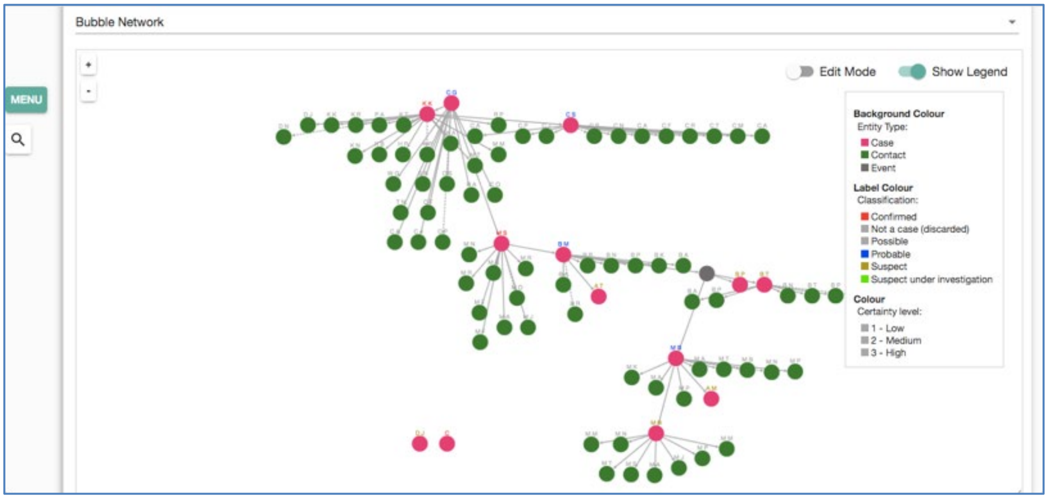
Viewing Chains of transmission graphs

Viewing Chains of transmission graphs allows you to visually review the transmission of a suspected disease during an outbreak. The Chains of transmission graphs provides a single location to view the Chains of transmission graphs for a selected outbreak.

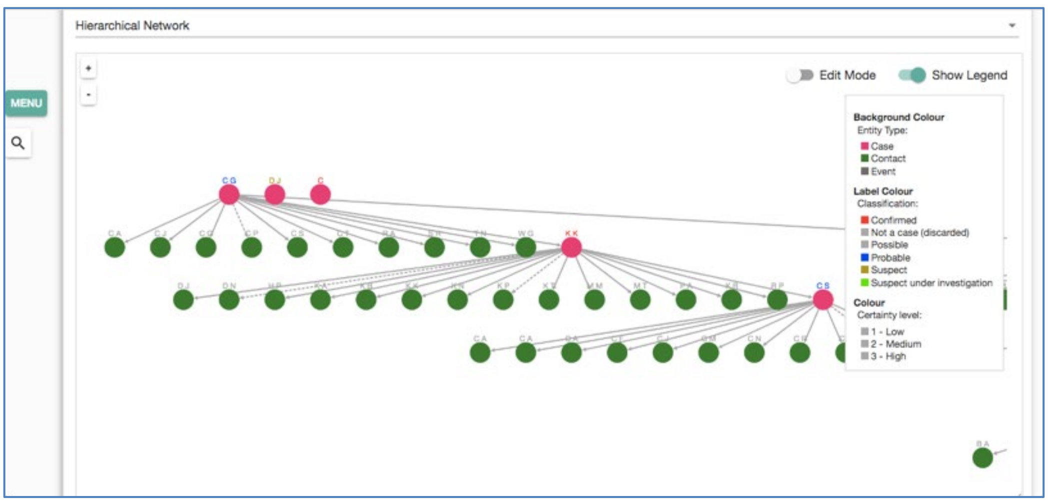
In addition, you can access individual cases, contacts, and events from the Chains of transmission graphs.

By default, the Chains of transmission graphs display the Bubble Network chain of transmission. You can use the graph's drop-down menu to select different types of Chains of transmission, including:

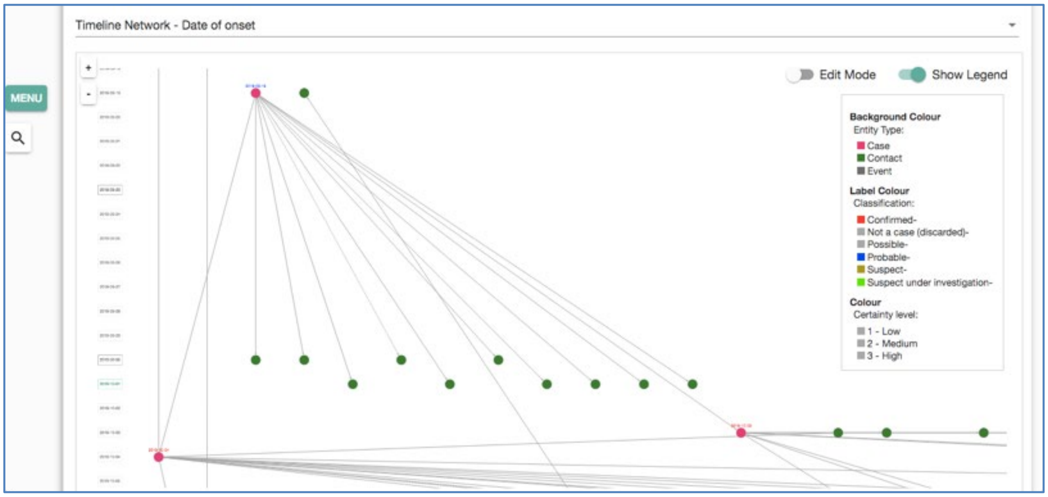
- **Bubble network:** Displays nodes and arrows to visualise the relationships between cases, contacts, and events for a specific outbreak.



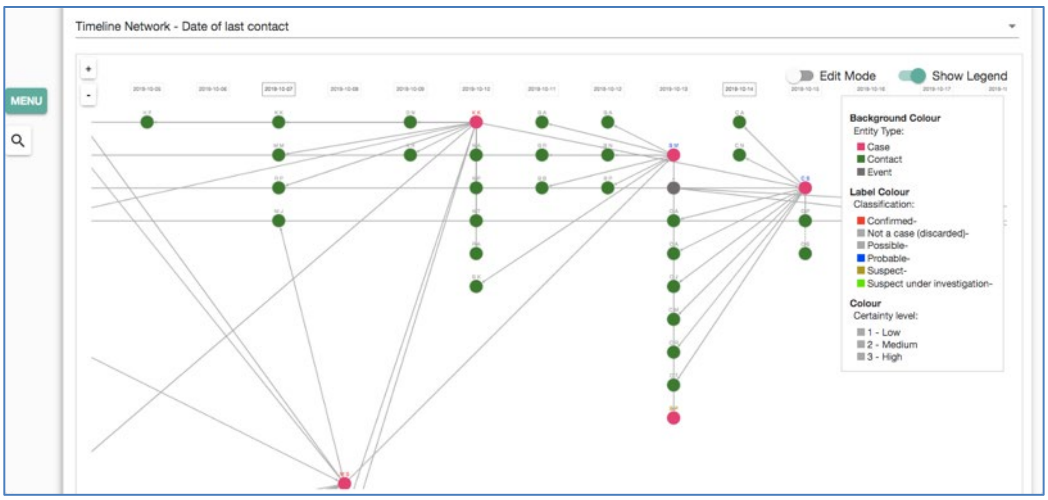
- **Geospatial map**: Uses the mapping servers configured during outbreak setup to transpose transition chains on a geographic map.
- **Hierarchical network:** Displays nodes and arrows to visualise the linear progression of a particular transmission chain.



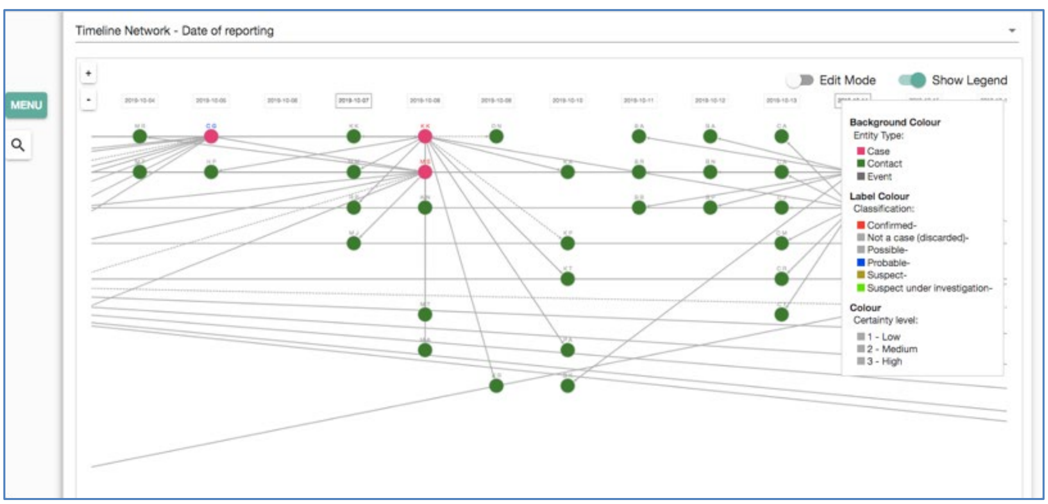
- **Timeline based on date of onset:** Displays the chronological progression of transmission chains based on the date of onset.



- **Timeline based on date of last contact:** Displays the chronological progression of transmission chains based on the date of last contact.



- **Timeline based on date of reporting:** Displays the chronological progression of transmission chains based on the date of reporting.



Chains of transmission graphs field definitions

Item	Description
Configure settings	Click this button to edit the information displayed by the Chains of transmission graph.
Date	Defines the Chains of transmission graph for a specific date.
Drop-down menu	Use this menu to change the type of transmission chain displayed.
+	Increase the zoom on the transmission chain.
-	Decrease the zoom on the transmission chain.
Edit mode	Select this toggle to rearrange the nodes in the transmission chain.
Show legend	Select this toggle to display the legend for the transmission chain.
Transmission chain	The graph displayed by Go.Data. Select and drag to view different areas of large transmission chains.
Arrow	Represents the relationship between cases, contacts, and events in a transmission chain. Click the arrow to view relationship details.
Node	Represents a case, contact, or event in a transmission chain. Click the node to view individual record details.

To view Chains of transmission graphs

1. Select **Menu > Data Visualisation > Chains of transmission graph**.

   Go.Data displays the Chains of transmission graph.
2. Select the type of transmission chain you wish to generate from the drop-down menu.

   Go.Data displays the selected type of Chains of transmission graph.

Configuring Chains of transmission graphs

Go.Data allows you to modify the data displayed by Chains of transmission graphs through the Configure Settings menu. Through the Configure Settings menu, you can edit the records Go.Data displays, use filters to only display certain records, change the information Go.Data displays in the nodes, and edit edge display options.

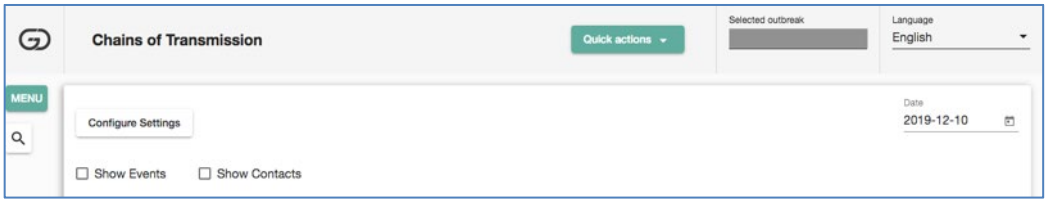
The Configure Settings menu contains these sections:

- Menu display options
- Filters
- Node display options
- Edge display options.

Configuration menu display options

From the Configure Settings menu, you can choose the types of records Go.Data displays in the Chains of transmission graph. By default, Go.Data always displays cases. You can choose to show or hide events and contacts by making selections in this menu.

Applies to all types of Chains of transmission graphs.



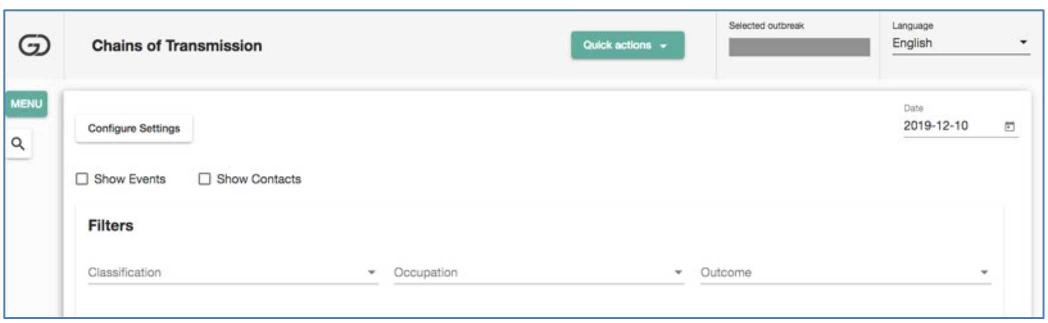
Configuration menu display options field definitions

Item	Description
Show events	Displays events in the Chains of transmission graph.
Show contacts	Displays contacts in the Chains of transmission graph.

Configuration display filters

The Filters section of the Configure Settings menu includes fields that allow you to display specific records in your Chains of transmission graph. Using this section, you can choose to display record nodes based on a number of different criteria.

Filters apply to all types of Chains of transmission graphs.



Display filters field definitions

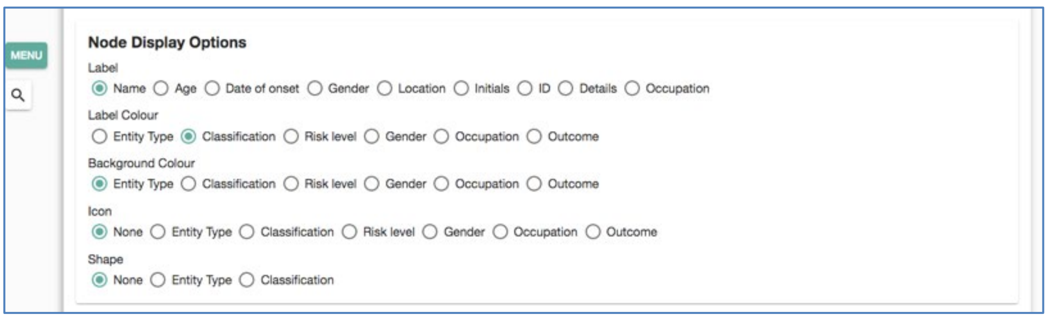
Item	Description
Classification	Whether the individual is considered a suspect, probable, or confirmed case.
Occupation	The individual’s field of work.
Outcome	The end result, if known, for the individual in the case.
First name	The given name of an individual.
Last name	The family name of an individual.
Gender	The given gender of an individual

Item	Description
Area	The geographical location of an individual’s address.
Age from	The minimum age to display.
Age to	The maximum age to display.
Date from	The earliest record date to display.
Date to	The latest record date to display.

Configuration node display options

The Configuration node display options allow you modify the way record nodes are displayed in Chains of transmission graphs.

Note display options apply to all types of Chains of transmission graphs except for geospatial maps.



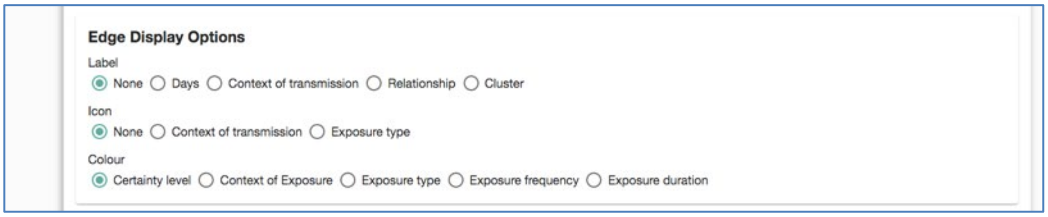
Configuration node display options field definitions

Item	Description
Label	Displays labels of Chains of transmission nodes for a record based on name, age, date of onset, gender, location, initials, ID, details, or occupation.
Label colour	Displays the colour of Chains of transmission node labels grouped by entity type, classification, risk level, gender, occupation, or outcome. For more information, see Introduction to reference data. .
Background colour	Displays Chains of transmission nodes in unique colours based on entity type, classification, risk level, gender, occupation, or outcome. For more information, see Introduction to reference data.
Icon	Displays icons as Chains of nodes for a record based on entity type, classification, risk level, gender, occupation, outcome, or no icon. For more information, see Introduction to reference data.
Shape	Displays the shape of the Chains of transmission node based on entity type, classification, or no icon.

Configuration edge display options

The Configuration edge display options allow you to modify the way arrows are displayed in Chains of transmission graphs.

Edge display options apply to all types of Chains of transmission graphs except for geospatial maps.



Configuration edge display options field definitions

Item	Description
Label	Displays labels on Chains of transmission arrows identifying the relationship between two nodes. Labels can be days, context of transmission, relationship, cluster, or none.
Icon	Displays icons adjacent to Chains of transmission arrows identifying the relationship between two nodes. Icons can be used to display the context of transmission, exposure type, or none. For more information, see Introduction to reference data.
Colour	Displays colour-coded Chains of transmission arrows based on certainty level, context of exposure, exposure type, exposure frequency, or exposure duration. For more information, see Introduction to reference data.

To configure Chains of transmission graph

1. Select **Menu > Data visualisation > Chains of transmission graph**.

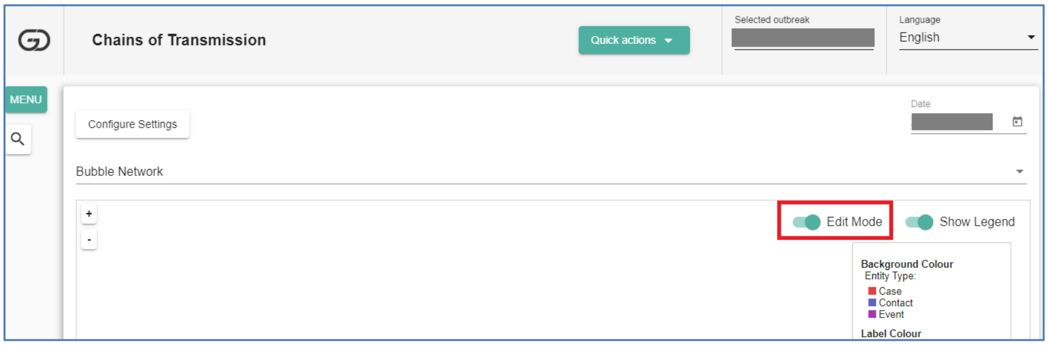
   Go.Data displays the Chains of transmission graph.
2. Click the **Configure Settings** button.

   Go.Data displays the Configure Settings menu.
3. Make your desired selections and click the **Generate Graph** button.

   Go.Data applies the configuration and displays the Chains of transmission graph.

Using edit mode for Chains of transmission graphs

Within the chains of transmission graphs feature, you can directly edit the details and relationships for the cases, contacts, and events displayed by the graph.



With Edit mode activated, you can select a node on the graph to view and edit the details for the record. Additionally, you can select an arrow to view and edit relationship details. Once selected, the record details or relationship details display within a box located below the graph. The information displayed by the Edit mode details box varies based on the type of record or relationship selected.

Finally, you can open two records simultaneously to create a new relationship.

Edit mode details box actions

Item	Description
Close ✕	This button closes the Edit mode details box.
Edit Edit	This button opens a new box in which you can modify the record's or relationship's details.
Add contact Add contact	This button opens a new box in which you can create a new contact for the record.

Item	Description
Delete Delete	The button deletes the record or relationship.
View resource View Resource	This button opens Go.Data in a new window and displays the record or relationship within the application.
View chain View Chain	This button opens Go.Data in a new window and displays the Chain of transmission graph for the record.
Reverse persons Reverse persons	This button changes the transmission direction of an existing relationship.
Change relationship ⇅	This button changes the transmission direction when adding a new relationship.
Save Save	This button saves a record you have edited.
Create relationship Create Relationship	This button confirms a new relationship you have added.
Create contact Create Contact	This button confirms a new contact you have added.

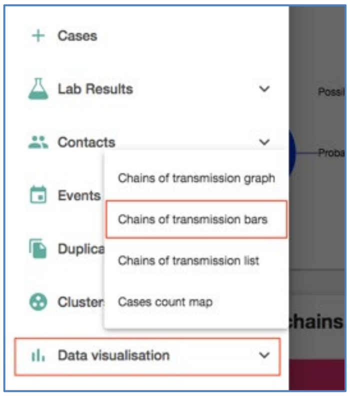
To activate edit mode for Chains of transmission graphs

1. Select **Menu > Data visualisation > Chains of transmission graph**.

   Go.Data displays the Chains of transmission graph.
2. Select the **Edit mode** toggler.

   Go.Data activates Edit mode.

Introduction to Chains of transmission bars



The Chains of transmission bars data visualisation allows you to chronologically view case details, such as date of onset of symptoms, hospitalization and isolation, lab result details, outcome, such as alive, deceased, or recovered, and burial information, such as buried not safe or buried safe.

By default, the Chains of transmission bars graph displays all cases associated with the active outbreak.

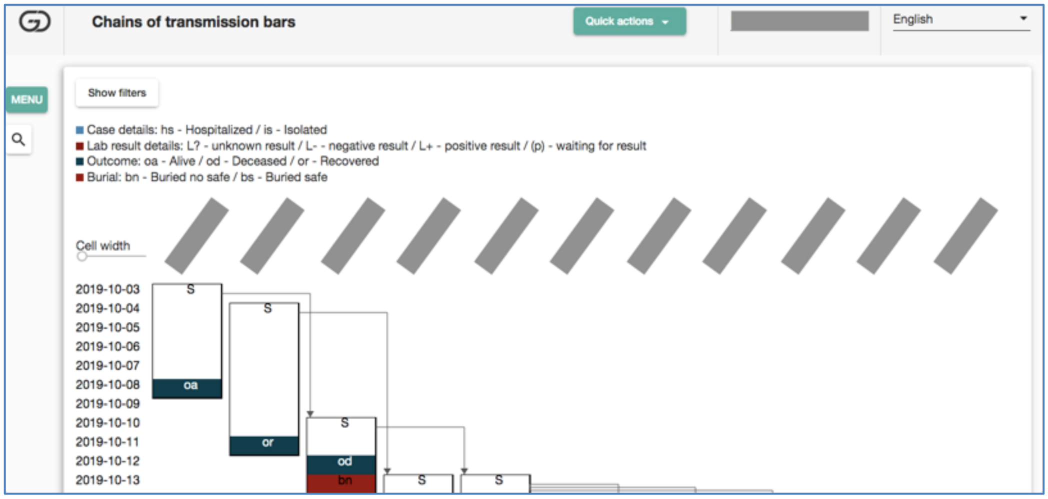
You can configure the Chains of transmission bars graph using the Filters menu.

Viewing Chains of transmission bars

Viewing Chains of transmission bars helps you review the chronological progression of all cases for a selected outbreak. The Chains of transmission bars graph displays case information as a timeline from top to bottom.

The Chains of transmission bars graph displays this case information.

- **Case details:** Illustrates a case's hospitalization and isolation information.
- **Lab result details:** Displays a case's lab results information including unknown result, negative result, positive result, and waiting for result.
- **Outcome:** Displays if a case is alive, deceased, or recovered.
- **Burial:** Notes if a case was buried not safe or buried safe.



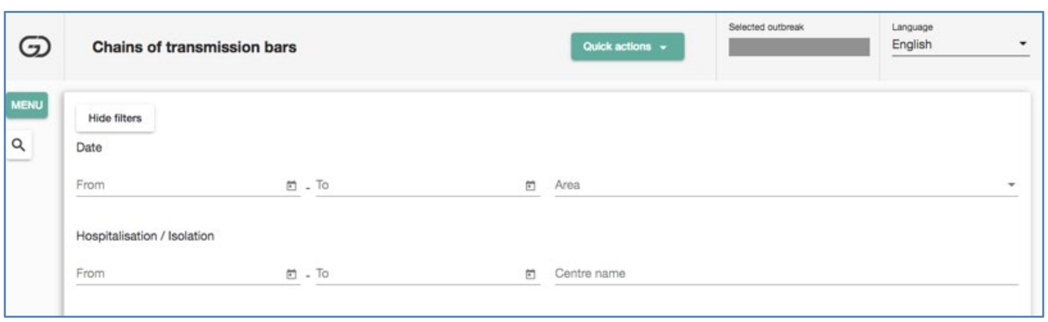
To view Chains of transmission bars

1. Select **Menu > Data visualisation > Chains of transmission bars**.

   Go.Data displays the Chains of transmission bars graph.

Configuring Chains of transmission bars

Go.Data allows you to change the data displayed in the Chains of transmission bars graph. By clicking the **Show filters** button, you can select the data displayed by the Chains of transmission bars graph. By default, Go.Data displays all cases for the active outbreak.



Display filters field definitions

Item	Description
Date from	The earliest case date to display.
Date to	The latest case date to display.
Area	The geographical location of the case.
Hospitalisation / Isolation from	The earliest hospitalization or isolation date to display cases for in the graph.
Hospitalisation / Isolation to	The latest hospitalization or isolation date to display cases for in the graph.

Item	Description
Centre name	The hospitalization or isolation centre name to display associated cases for.
Classification	Whether the individual is considered a suspect, probable, or confirmed case.
Outcome	The end result, if known, for the individual in the case.

To configure Chains of transmission bars

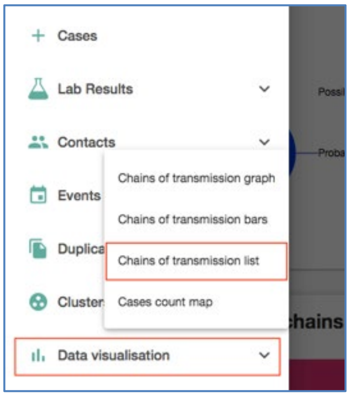
1. Select **Menu > Data visualisation > Chains of transmission bars**.

   Go.Data displays the Chains of transmission bars graph.
2. Click the **Show filters** button.

   Go.Data displays the **Filters** menu.
3. Make your selections and click the **Apply filters** button.

   Go.Data applies the configuration and displays the Chains of transmission bars graph.

Introduction to Chains of transmission lists



Chains of transmission graphs are also available as Chains of transmission lists with one entry per distinct chain with the proposed root case based on earliest date of onset, the chain length, and duration.

The Chains of transmission list allows you to view overall outbreak statistics, such as the earliest date of onset, root cause, number of cases, number of alive cases, number of contacts, and duration.

From the Chains of transmission list, you can click the root case to view the Chains of transmission graph. The Chains of transmission graph displays the logic Go.Data uses to determine the root cause of the outbreak.

You cannot configure the Chains of transmission list.

Viewing Chains of transmission lists

Viewing the Chains of transmission list helps you understand the overall impact caused by an outbreak.

By viewing the Chains of transmission list, you can identify the root cause of an outbreak as determined by Go.Data based on the data documented in the application. In addition, you can view the duration of the outbreak in days and the earliest date of onset documented in Go.Data.

Chains of transmission list field definitions

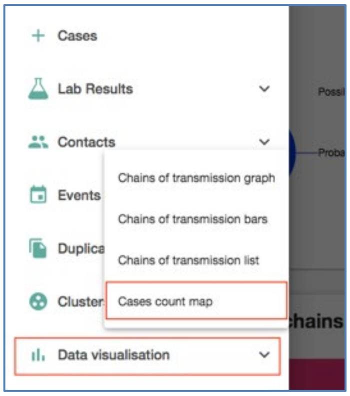
Item	Description
Earliest date of onset	The date associated with the oldest case in Go.Data for the active outbreak.
Root case	The record determined by Go.Data to be the initial cause of an outbreak.
Number of cases	A count of cases documented in Go.Data.
Number of alive cases	A count of cases documented in Go.Data who are still living.
Number of contacts	A count of outbreak contacts in Go.Data.
Duration	A count of how many days the outbreak has been active.
Active	Displays **Yes** if the outbreak is still in progress. Displays **No** if the outbreak is no longer in progress.

To view Chains of transmission list

1. Select **Menu > Data visualisation > Chains of transmission list**.

   Go.Data displays the Chains of transmission list.

Introduction to case count maps



The Case count map allows you to view a numerical count of all cases for an outbreak overlaid on a geographical map. Viewing cases based on map location allows you to see how an outbreak has spread geographically by case count.

From the Case count map, you can use filters to view specific case counts by classification, occupation, outcome, name, gender, area, age, or date.

The geographical map used by the Case count map is determined by the mapping servers configured during outbreak setup. For more information about configuring outbreak maps, see Adding or modifying outbreaks.

Viewing case count maps

Viewing a case count map allows you to determine the geographical impact of a particular outbreak. The Case count map provides a numerical count of cases for a specific area.

The case count is represented by pinpoint on the map. As you zoom in, the case counts become more specific. As you zoom out, the counts become broader.

By default, Go.Data displays counts of all cases for a specific outbreak. Using the Filters menu, you can configure the Case count map to display records based on specific criteria.

Case count map field definitions

Item	Description
Display filters	Click this button to open the Filters menu.
Distance for aggregating case counts	Use the slider to select the radius for counting cases and creating map pinpoints. The radius ranges from 10km to 150km.
+	Increase the zoom on the Case count map.
-	Decrease the zoom on the Case count map.

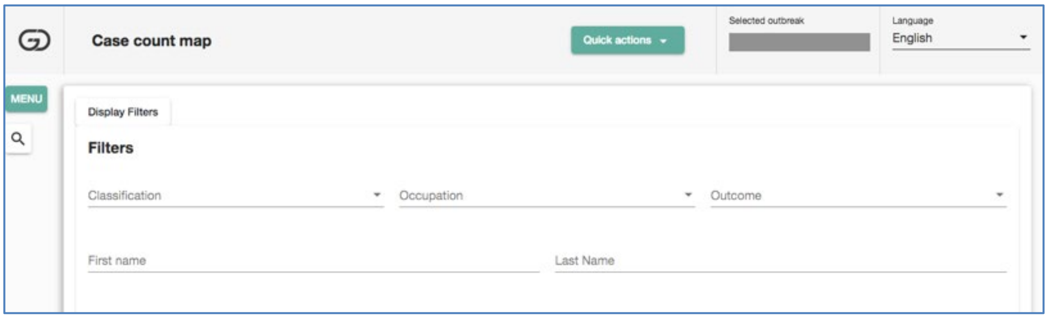
To view a case count map

1. Select **Menu > Data visualisation > Case count map**.

   Go.Data displays the Case count map.

Configuring case count maps

Go.Data allows you to change the data displayed in the Case count map. By clicking the **Display Filters** button, you can select the data displayed by the Case count map. By default, Go.Data displays case counts for all cases in Go.Data.



Display filters field definitions

Item	Description
Classification	Whether the individual is considered a suspect, probable, or confirmed case.
Occupation	The individual's field of work.
Outcome	The end result, if known, for the individual in the case.
First name	The given name of an individual.
Last name	The family name of an individual.
Gender	The given gender of an individual.
Area	The geographical location of an individual's address.
Age from	The minimum age to display.
Age to	The maximum age to display.
Date from	The earliest record date to display.
Date to	The latest record date to display.

To configure a case count map

1. Select **Menu > Data visualisation > Case count map**.

   Go.Data displays the Case count map.
2. Click the **Display Filters** button.

   Go.Data displays the Filters menu.

3. Make your desired selections and click the **Refresh Map** button.

   Go.Data applies the configuration and displays the Case count map.

Exporting Chains of transmission

Go.Data allows you to export data visualisations in PDF format so that the pages can be printed and assembled like a jigsaw puzzle in a large hard copy format.

You can export data visualisations at any time by selecting **Quick actions > Export X**, where *X* stands for the name of the data visualisation. The following data visualisations are available to export:

- Chains of transmission graphs
- Chains of transmission bars
- Case count map.

By default, Go.Data will export a data visualisation with all records displayed. You can configure your data visualisation, then export to create a PDF with specific records displayed.

When exporting Chains of transmission graphs other than Geospatial maps, you must select a level of scale for graph content. The higher the level of scale you choose, the larger the graph will be. The higher the scale, the longer it can take to export Chains of transmission graphs.

When exporting Chains of transmission Geospatial maps, Chains of transmission bars, and Case count maps, you cannot choose the scale for export.

You cannot export Chains of transmission lists.

For additional information on configuring data visualisations, see Configuring Chains of transmission graphs, Configuring Chains of transmission bars, and Configuring case count maps.

To export Chains of transmission

1. Select **Menu > Data visualisations**.

   Go.Data displays the Data visualisation sub-menu.
2. Select the Chains of transmission data visualisation you wish to export.

   Go.Data displays the data visualisation.
3. Configure the data visualisation.

   Go.Data applies the configurations and displays the data visualisation.
4. Select **Quick actions > Export X**, where *X* stands for the name of the data visualisation.
5. If prompted, select the level of scale and click **YES**.

   Go.Data exports the data visualisation as a PDF.

Part III – System Administration

Chapter 16 – Configuring the Go.Data system

As a system administrator, you can configure your instance of Go.Data to fully meet the needs of your team, resources, and the outbreak you are managing.

In complex scenarios, your Go.Data network can consist of multiple machines, including upstream servers, client applications, and mobile devices. Use of the Go.Data mobile application in conjunction with the Go.Data web application is very common. Once configured, all mobile devices display in the Devices list. From the Client applications and Devices lists, you can provide and limit access to an instance of Go.Data.

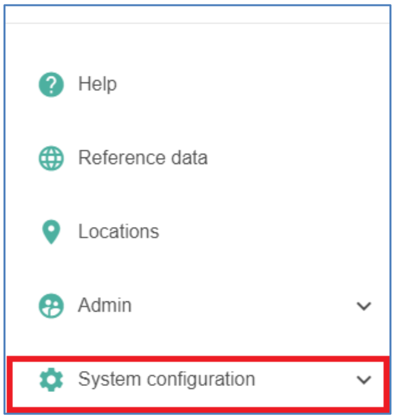
In the event a device is lost, you can also wipe outbreak data from the mobile device.

Additionally, you can create synchronisation packages for sharing data with other instances of Go.Data.

Finally, Go.Data provides functionality for creating backups and restoring your instance of the application to a previous state. This is essential, and setting up automatic backup should be completed as soon as you install Go.Data.

Chapter Contents

Understanding Go.Data networks



As a system administrator, you can configure Go.Data to exchange information with other instances of Go.Data. These instances are known as upstream servers and client applications.

In a typical configuration, the Go.Data mobile application sends data and information to a server and receives data and information from the server. A mobile device such as a smartphone or tablet used for contact follow-up purposes is considered a client application.

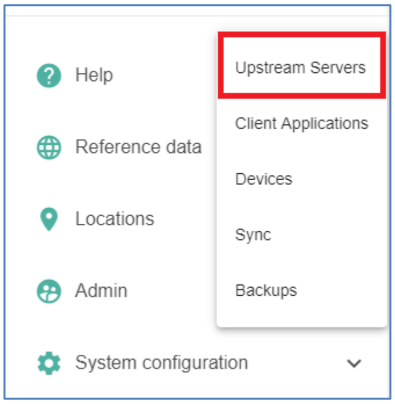
Additionally, Go.Data offers functionalities to create synchronisation packages, which can be used to exchange data between separate Go.Data instances.

Most actions related to configuring Go.Data start from the System configuration menu.

- **Upstream servers list**: a single location to view all upstream servers for your instance of Go.Data.
- **Client applications list**: a single location to view all client applications for your instance of Go.Data.
- **Devices list**: a single location to view all mobile devices for your instance of Go.Data.
- **Sync logs list**: a single location to view synchronisation information and events for your instance of Go.Data.
- **System backups list**: a single location to view backup information and events for your instance of Go.Data.

For more information, see Where does my data go and how does it relate to the outbreak?

Managing upstream servers



When configuring your Go.Data network, you may wish to send data and information to an instance of an application that exists on a centralized server. This functionality allows you to link multiple machines together, collaborate, and exchange data when multiple users are working on an outbreak simultaneously from different locations.

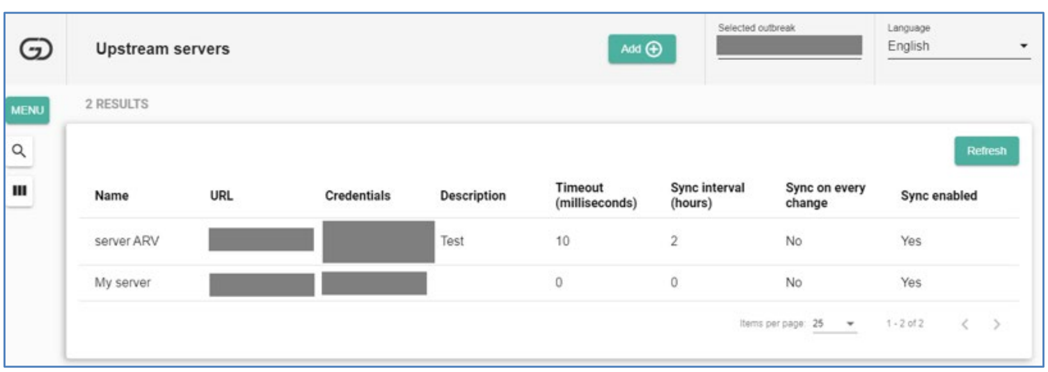
This is a complex scenario you can implement in certain conditions, including patchy internet connectivity or data management policies in a specific context.

An instance of Go.Data that receives data and information for another instance of Go.Data is considered an upstream server.

Users with system administrator-level credentials can manage upstream servers. All actions related to managing upstream servers begin from the Upstream servers list.

Upstream servers list

The Upstream servers list provides a single location to review all upstream servers within your Go.Data network. From this list, you can review important upstream server information, including the name, URL, credentials, and synchronisation information.



When setting up upstream servers, you will most likely rely on the assistance of an IT expert. This assistance assures your network is configured properly and that the Go.Data application is visible over your entire network.

During the upstream server configuration process, you set the synchronisation settings for your instance of Go.Data and the upstream server.

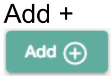
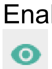
By default, the Upstream servers list displays all upstream server records within your Go.Data network.

This list uses standard functionality as defined in Working with lists. In addition, this list features functionality specific to syncing.

Upstream servers list field definitions

Item	Description
Name	The given name of a server.
URL	The uniform resource locator used to locate a server.
Credentials	The designated credentials client ID/The designated credential client secret password.
Description	Any text used to describe a server.
Timeout (milliseconds)	The amount of time in milliseconds before a timeout with a server occurs.
Sync interval (hours)	How often data and information is synced between Go.Data and a server.
Sync on every change	**Yes** signifies that a sync with the server occurs every time a user makes a change in Go.Data.
Sync enabled	**Yes** signifies that the server's sync occurs at the given server interval.

Upstream servers list actions

Item	Description
Add + 	This button allows you to add a new upstream server.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to an upstream server selected.
Disable sync 	This hover action allows you to change the **Sync enabled** status to **No**.
Enable sync 	This hover action allows you to change the **Sync enabled** status to **Yes**.
Start sync 	This hover action allows you to manually begin syncing data and information between Go.Data and the upstream server.

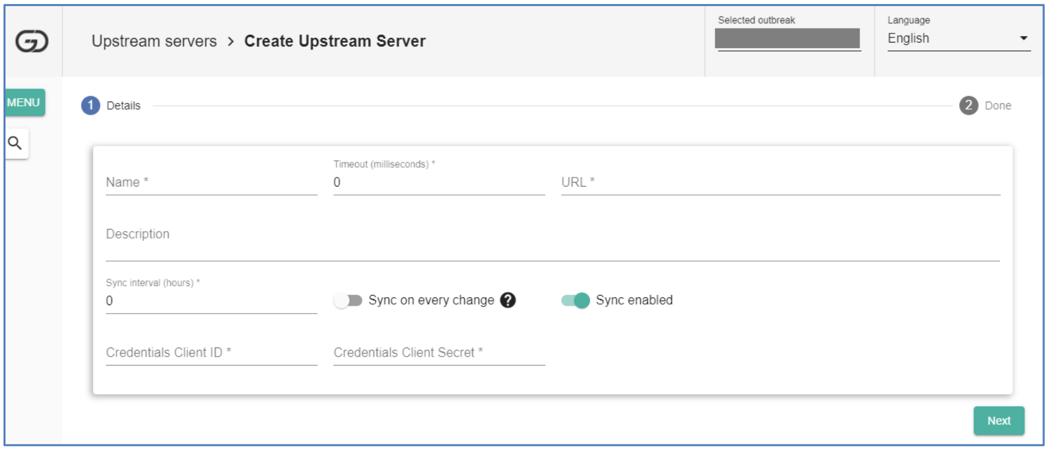
To view upstream servers

1. Select **Menu > System configuration > Upstream servers**.

   Go.Data displays the Upstream servers list.

Adding upstream servers

Any user with system administrator-level credentials can add and configure upstream servers at any time during an outbreak.



When adding an upstream server, you must provide the URL of the server.

When configuring the upstream server, you create a client id and password that your instance of Go.Data provides to the upstream server to identify itself. Additionally, you need to configure the upstream copy of Go.Data to match the client ID and password.

You must complete the Upstream servers details tab when adding upstream servers.

NOTE	If available, it is recommended that you employ the help of an IT professional when adding and configuring upstream servers.

To add an upstream server

1. Select **Menu > System configuration > Upstream servers**.

   Go.Data displays the Upstream servers list.
2. Click the **Add+** button.

   Go.Data displays Upstream server details.
3. Complete the Details tab.

   - **Name**: Enter a given name for the server. Required.
   - **Timeout (milliseconds)**: Enter the amount of time in milliseconds before a timeout with the server occurs. Required.
   - **URL**: Enter the address used to locate the server. Required.
   - **Description**: Enter any text you wish to use to describe the server.
   - **Sync interval (hours)**: Enter a time in hours for how often data is synchronised with the upstream server. Required.
   - **Sync on every change**: Select this toggle to synchronise the upstream server every time a user saves a change in Go.Data.
   - **Sync enabled**: Select this toggle to synchronise the upstream server automatically at the given synchronisation interval.
   - **Credentials Client ID**: Enter a client ID to identify the upstream server. Required.

- **Credentials Client Secret**: Enter a password used to access the upstream server. Required.

4. Click the **Next** button.

   Go.Data displays a data entry completed message.

5. Click the **Create upstream server** button.

   Go.Data displays a confirmation message and returns to the Upstream servers list.

Syncing upstream servers

Go.Data provides functionality for you to manually sync upstream servers at any time. In addition, you can enable or disable the automatic sync feature from the Upstream servers list.

This functionality can be helpful if you are working on a slow network or if you are required to record a bulk amount of data before uploading the information to an upstream server.

To manually sync an upstream server

1. Select **Menu > System configuration > Upstream servers**.

   Go.Data displays the Upstream servers list.
2. Hover over an upstream server and click the **Start sync** icon.

   Go.Data displays the Are you sure you want to sync with the upstream server message.
3. Click **YES**.

   Go.Data displays a confirmation message.

To enable or disable sync

1. Select **Menu > System configuration > Upstream servers**.

   Go.Data displays the Upstream servers list.
2. Do one of the following:

   - To enable sync, hover over an upstream server and click the **Enable sync** icon.
   - To disable sync, hover over an upstream server and click the **Disable sync** icon.

   Go.Data displays a confirmation message. If you enabled sync, the process will happen as scheduled.

Deleting upstream servers

Subject to your user permissions, you can delete an upstream server at any time. If you delete an upstream server, you remove the configuration and cannot sync data to that server.

In the event you would like to begin syncing data with the server, you need to manually add and configure the server again.

To delete an upstream server

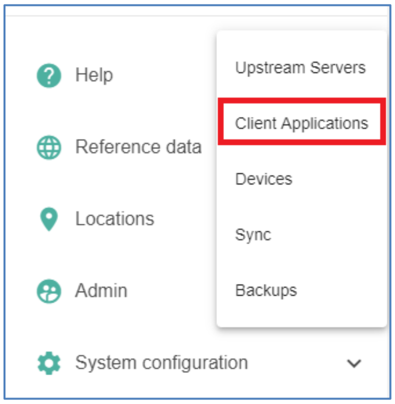
1. Select **Menu > System configuration > Upstream servers**.

   Go.Data displays the Upstream servers list.
2. Hover over an upstream server and click the **Options** icon.
3. Select **Delete server**.

   Go.Data displays the Are you sure you want to delete this upstream server message.
4. Click **YES**.

   Go.Data displays a confirmation message.

Managing client applications



As a system administrator, after you have configured upstream servers, you can configure the client applications that send data and information to the server or upstream server.

When configuring a client application, you should assign specific outbreak(s) only.

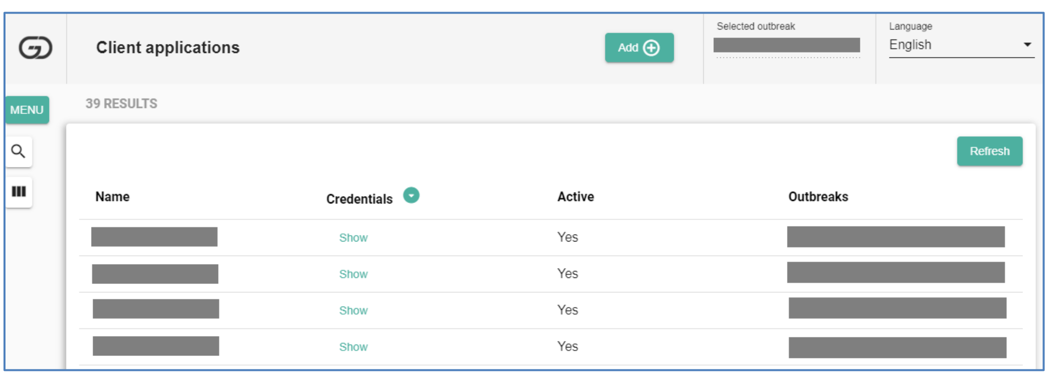
Client applications employ a client ID and secret password to synchronise data and information with an instance of Go.Data. When adding the client application, you can specify the client ID and password, or have the system automatically generate them.

After you have configured the client application within Go.Data, you can configure and add the mobile device. After adding the client application and mobile device, the device appears in the Devices list.

For more information, see Adding mobile devices.

Client applications list

The Client applications list provides a single location to review all client applications within your Go.Data network. From this list, you can review important client application information, including the name, credentials, and assigned outbreak.

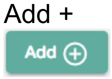
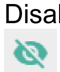
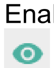


By default, the Client applications list displays all client applications within your Go.Data network. This list uses standard functionality as defined in Working with lists.

Client applications list field definitions

Item	Description
Name	The given name of a client application.
Credentials	The designated credentials used to connect the client application to the upstream server.
Active	**Yes** indicates the client application can be used to collect data and information. **No** indicates the client application cannot be used to collect data and information.
Outbreaks	The outbreaks assigned by the system administrator to the client application.

Client applications list actions

Item	Description
Add + 	This button allows you to add a new upstream server.
Show/Hide 	This button opens a menu from which you may choose to show all credentials or hide all credentials.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to a client application.
Disable 	This hover action allows you to deactivate a client application.
Enable 	This hover action allows you to activate a client application.
Download configuration file 	This hover action opens a screen from which you can make selections and download a QR code to configure a mobile device.

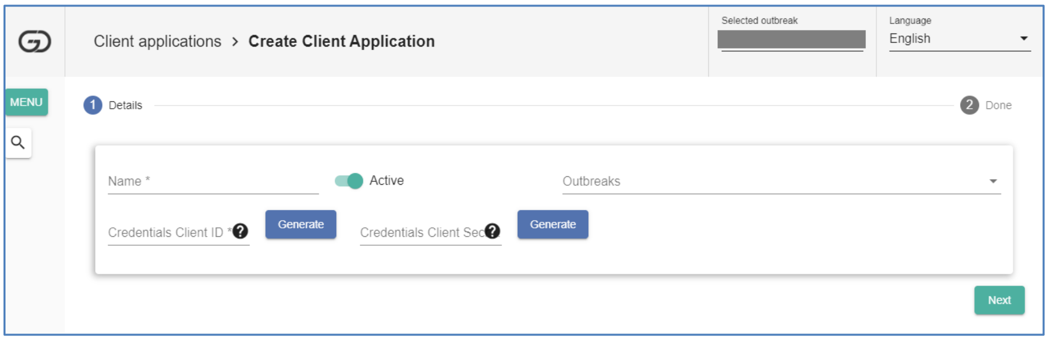
To view client applications

1. Select **Menu > System configuration > Client applications.**

   Go.Data displays the Client applications list.

Adding client applications

Any user with system administrator-level credentials can add and configure client applications at any time during an outbreak. This feature allows you to a create QR code connector for a mobile device.



When adding a client application, you create the client ID and password required to add a device to your Go.Data network. You can click the **Generate** button to have the system randomly generate an ID and password.

You must complete the Client application details tab when adding client applications.

NOTE	If available, it is recommended that you employ the help of an IT professional when adding and configuring client applications.

To add a client application

1. Select **Menu > System configuration > Client applications**.

   Go.Data displays the Client applications list.
2. Click the **Add+** button.

   Go.Data displays Client application details.
3. Complete the Details tab.

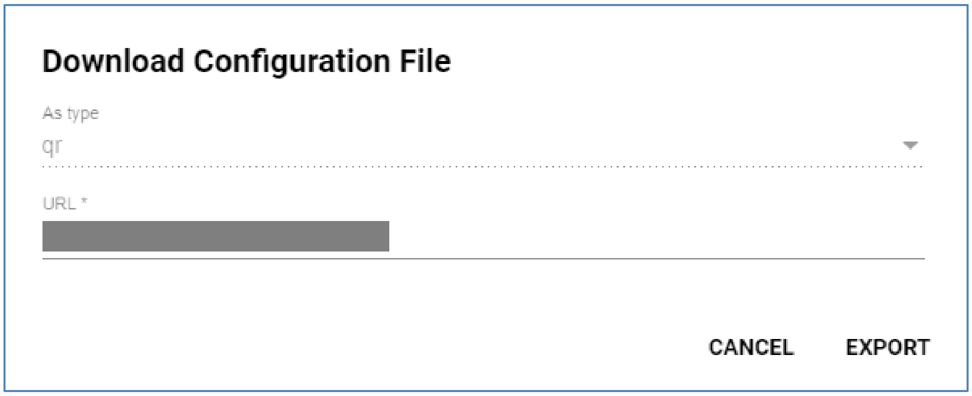
   - **Name**: Enter a given name for the client application. Required.
   - **Active**: Select this toggle to enable the client application for use.
   - **Outbreaks**: Select one or more outbreaks from the drop-down list to assign to the client application.
   - **Credentials Client ID**: Enter a client ID to identify the client application when connecting a device. You can click the **Generate** button to have the system create the Credentials client ID. Required.
   - **Credentials Client Secret**: Enter a password that the client application uses when connecting a device. You can click the **Generate** button to have the system create the Credentials password. Required.
4. Click the **Next** button.

   Go.Data displays a data entry completed message.
5. Click the **Create client application** button.

   Go.Data displays a confirmation message and returns to the Client applications list.

Downloading configuration files

Go.Data allows you to download a configuration file for use when connecting a device to an instance of Go.Data.



By default, Go.Data provides the configuration file as a QR code. This QR code contains the URL for the instance of Go.Data to which you are connecting the client application. After you have connected to the client application to a mobile device, the device appears in the Devices list.

To download a configuration file

1. Select **Menu > System configuration > Client applications**.

   Go.Data displays the Client applications list.
2. Hover over a client application and click the **Download configuration file** icon.

   Go.Data displays the Download configuration file screen.
3. Complete the **Download configuration file** screen fields.

   - **As type**: Select the file format in which to download the configuration file.
   - **URL**: Enter the URL for the configuration file.

4. Click **Export**.

   Go.Data exports the configuration file in the selected file type.

Disabling and re-enabling client applications

Go.Data provides functionality for you to disable and re-enable client applications. This functionality is helpful when managing contact tracer teams during an outbreak.

To enable or disable a client application

1. Select **Menu > System configuration > Client applications**.

   Go.Data displays the Client applications list.

2. Do one of the following:

   - To enable a client application, hover over a client application and click the **Enable** icon.
   - To disable a client application, hover over a client application and click the **Disable** icon.

   Go.Data displays a confirmation message.

Deleting client applications

Subject to your permissions, you can delete a client application at any time. When you delete a client application, you remove the configuration and no longer can synchronise data.

In the event you would like to begin synchronising data with the client application, you need to manually add and configure the client application again.

To delete a client application

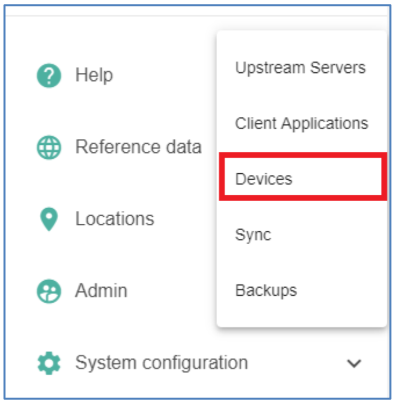
1. Select **Menu > System configuration > Client applications**.

   Go.Data displays the Client applications list.
2. Hover over a client application and click the **Options** icon.
3. Select **Delete app**.

   Go.Data displays the Are you sure you want to delete this client application message.
4. Click **Yes**.

   Go.Data displays a confirmation message.

Managing devices



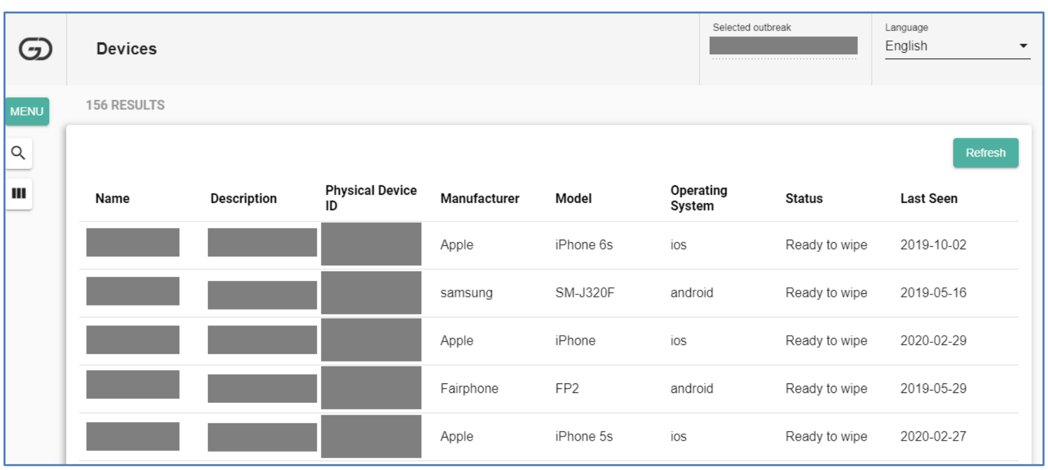
As a system administrator, after you have configured the client application, you can connect a mobile device to your Go.Data network. You can add a mobile device using the configuration file or by manually entering the configuration information.

All devices within your Go.Data network appear on the Devices list. From the Devices list, you can complete actions related to mobile devices such as viewing the device connection history, wiping a device, and deleting a device.

For more information on downloading and installing the Go.Data mobile application, see Installing Go.Data on mobile devices.

Devices list

The Devices list provides a single location for you to review all mobile devices within your Go.Data network. From this list, you can review device information, including the name, description, ID, manufacturer, model, operating system, status, and last seen date.



When adding a new device to Go.Data, you can either download the configuration file from the Client applications list or manually enter the configuration information.

By default, the Devices list displays all mobile devices within your Go.Data network.

This list uses standard functionality as defined in Working with lists.

Devices list field definitions

Item	Description
Name	The given name of a device.
Description	Any text used to describe a device.
Physical device ID	The ID used to identify a device in the Go.Data network.
Manufacturer	The manufacturer of a mobile device.
Model	The model name of a mobile device.
Operating system	The operating system used by the mobile device.
Status	Indicates whether a device is ready to wipe.
Last seen	The date the device was last used within the Go.Data network.

Devices list actions

Item	Description
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to managing devices.
Modify device	This hover action opens the details for the device selected so you may update the device's information.
View event	This hover action opens the details for the device selected so you may view the device's information

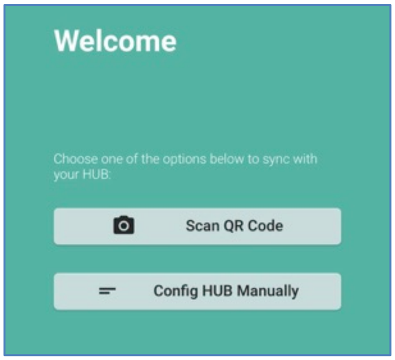
To view all devices

1. Select **Menu > System configuration > Devices**.

   Go.Data displays the Devices list.

Adding mobile devices

Any user with system administrator credentials can add a mobile device to your Go.Data network at any time during an outbreak.



Before adding a mobile device to your network, you must download the Go.Data mobile application on the device. For more information on downloading and installing the Go.Data mobile application, see Installing Go.Data on mobile devices.

Adding a mobile device to your Go.Data network requires a configuration file or manually entering the configuration information. For more information on downloading the client application configuration file, see Downloading configuration files.

NOTE	Go.Data restricts datasets to be downloaded on the mobile application based on the geographic responsibility of the team. Before connecting a mobile device to the instance of Go.Data, make sure the user account is assigned to an appropriate team. For more information, see Introduction to teams and assignments.

NOTE	If you are connecting your mobile device to a stand-alone instance of Go.Data, make sure that both your workstation and your mobile device are connected on the same network (Wi-Fi or LAN).

To add a mobile device to your network using a configuration file

1. Open the Go.Data mobile application on the device you wish to add to your network.

   Go.Data mobile displays the Welcome screen.
2. Select the **Scan QR Code** button.

   Go.Data mobile displays the Scan QR code screen.
3. Use the device's camera to scan the QR code in the configuration file.

   Go.Data mobile displays the HUB configuration screen.
4. Verify the information from the configuration file is correct.

   - **HUB name**: The name of this connection. Enter a name of your choice.
   - **HUB URL**: Verify the URL for the Go.Data network.

- **Client ID**: Verify the client ID used to identify the client application when connecting to a copy of Go.Data.
- **Client secret**: Verify the password used to connect the client application to Go.Data.
- **User email**: Enter an email address for the mobile device user.
- **Encrypted connection**: Verify whether the toggle is selected to encrypt the information transferred by the mobile device**.**
- **Number of records**: Verify the number of records per file in the sync process. A lower number means lower RAM consumption, but a longer sync process. For slower devices, use a lower number of records. If unsure, use the default setting.

5. Select the **Save and sync HUB** button.

   Go.Data mobile displays the Sync status screen and begins syncing the device with the network. When complete, Go.Data mobile displays a confirmation message, and the device appears in the Go.Data Devices list.

To add a mobile device to your network using manual configuration settings

1. Open the Go.Data mobile application on the device you wish to add to your network.

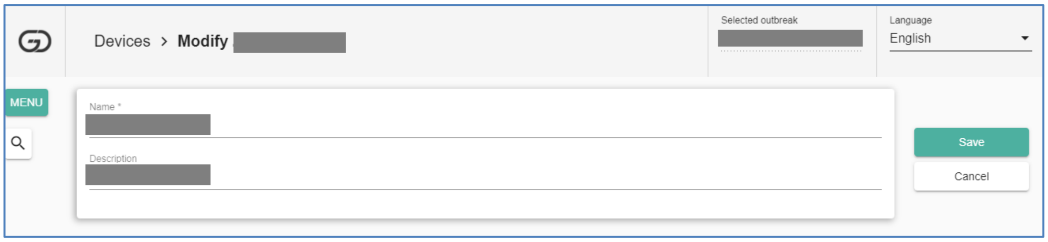
   Go.Data mobile displays the Welcome screen.
2. Select the **Config HUB manually** button.

   Data mobile displays the HUB configuration screen.
3. Complete the HUB configuration fields.
   - **HUB name**: Enter the name of the Go.Data network.
   - **HUB URL**: Enter the URL for the Go.Data network.
   - **Client ID**: Enter the client ID used to identify the client application when connecting to a copy of Go.Data.
   - **Client secret**: Enter the password used to connect the client application to Go.Data.
   - **User email**: Enter an email address for the mobile device user.
   - **Encrypted connection**: Select this toggle to encrypt the information transferred by the mobile device.
   - **Number of records**: Select the number of records per file in the sync process. A lower number means lower RAM consumption, but a longer sync process. For slower devices, use a lower number of records.
4. Select the **Save and sync HUB** button.

   Go.Data mobile displays the Sync status screen and begins syncing the device with the network. When complete, Go.Data mobile displays a confirmation message and the device appears in the Go.Data Devices list.

Modifying devices

By default, Go.Data provides a generic name for a mobile device when you add it to your Go.Data network. This generic name varies by device but is typically related to the device model.



When you have many devices within your Go.Data network, you may have a difficult time telling them apart by relying on the generic name. You may wish to modify the name of the device so you may properly identify devices while working on an outbreak.

To modify a device

1. Select **Menu > System configuration > Devices**.

   Go.Data displays the Devices list.
2. Hover over a device and click the **Modify device** icon.

   Go.Data displays the Modify device screen.
3. Edit the Modify device fields.

   - **Name**: Enter the given name of a device.
   - **Description**: Enter any text used to identify the device.
4. Click the **Save** button.

   Go.Data displays a confirmation message.

Wiping devices

Subject to your user permissions, in the event you no longer wish to provide a mobile device access to Go.Data, you can wipe the device remotely.

During an outbreak, Go.Data stores sensitive information. The wipe functionality allows you to easily revoke access in the event a mobile device is stolen or lost. Additionally, you can view the wipe history of a device from the Devices list.

When you wipe the device, the data recorded by the device remains in your instance of Go.Data.

The wipe functionality only affects Go.Data and the associated data and does not modify the mobile device in any other way.

To wipe a device

1. Select **Menu > System configuration > Devices**.

   Go.Data displays the Devices list.
2. Hover over a device and click the **Options** icon.
3. Select **Wipe**.

   Go.Data displays the Are you sure you want to wipe this device message.
4. Click **YES**.

   Go.Data displays the Devices list and changes the device’s status to Pending wipe.

To view the wipe history of a device

1. Select **Menu > System configuration > Devices**.

   Go.Data displays the Devices list.
2. Hover over a device and click the **Options** icon.
3. Select **View history**.

   Go.Data displays the Device wipe history screen.

Deleting devices

Subject to your user permissions, you can delete a device at any time. When you delete a device, you remove the configuration and no longer can sync data to that application.

In the event you would like to begin syncing data with the device, you need to manually add and configure the client application again.

To delete a device

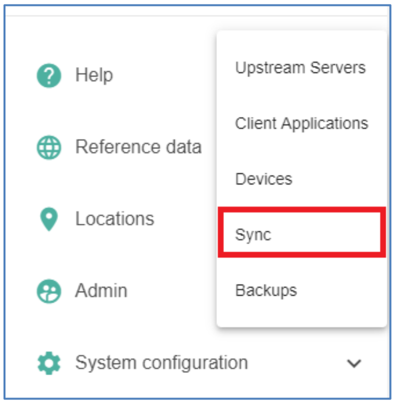
1. Select **Menu > System configuration > Devices**.

   Go.Data displays the Devices list.
2. Hover over a device and click the **Options** icon.
3. Select **Delete**.

   Go.Data displays the Are you sure you want to delete this device message.
4. Click **Yes**.

   Go.Data displays a confirmation message.

Synchronising devices



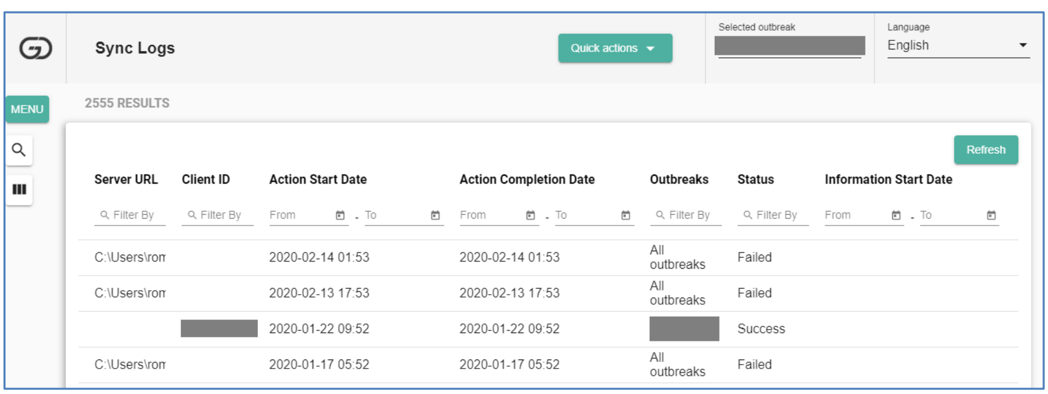
As a system administrator, you can view records and complete tasks related to synchronising the devices within your Go.Data network.

Go.Data displays a history of synchronisation events in the Sync logs list. All synchronisation events that have occurred within your Go.Data network appear in this list.

From the Sync logs list, you can complete actions relating to syncing devices such as viewing synchronisation errors, modifying sync settings, removing sync logs, deleting sync logs, and importing and exporting sync packages.

Sync logs list

The Sync logs list provides a single location for you to view the synchronisation history against the current instance of Go.Data. From this list, you can view important information such as the server URL, action start data, action completion date, and status.



From the Sync logs list, you can set synchronisation settings to trigger a data backup before a sync occurs.

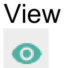
By default, the Sync logs list displays all Sync log records within your instance of Go.Data.

This list uses standard functionality as defined in Working with lists. In addition, this list features functionality specific to syncing.

Sync logs list field definitions

Item	Description
Server URL	The URL of the sync server.
Client ID	The ID used to identify a client application.
Action start date	The date and time the sync action began.
Action complete date	The date and time the sync action finished.
Outbreaks	The outbreaks included in the sync.
Status	Indicates if a sync was successful or failed.

Sync logs list actions

Item	Description
Quick Actions 	This button opens a menu from which you may choose additional actions related to a sync log.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to a sync log selected.
View error details 	This hover action allows you to view a report explaining why the sync failed.

To view the Sync logs list

1. Select **Menu > Sync**.

   Go.Data displays the Sync logs list.

Accessing sync backup settings

While working on an outbreak, you may need to ensure you have a rollback mechanism in place before performing a sync. As a Go.Data user with system administrator-level credentials, you can configure Go.Data to trigger a backup before a sync is performed.

This functionality is helpful if you are about to perform a large file synchronisation, or if you are performing a new synchronisation for the first time.

To access sync backup settings

1. Select **Menu > Sync**.

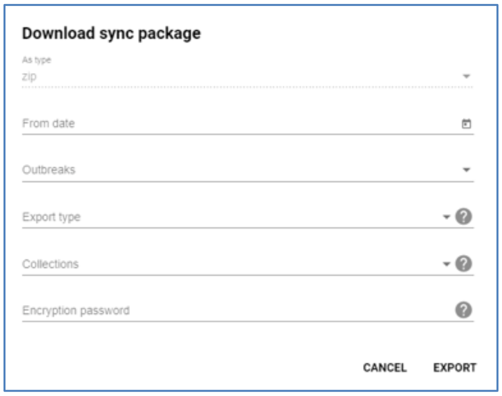
   Go.Data displays the Sync logs list.
2. Click the **Quick actions** button.
3. Click **Sync settings**.

   Go.Data displays the Sync settings screen
4. Make a selection in the **Trigger backup before sync** field.
5. Click **Save**.

   Go.Data displays a confirmation message.

Importing and exporting sync packages

Synchronisation packages allow you to quickly transfer the data from your instance of Go.Data and recreate it in another copy of the application. By default, sync packages import and export as .zip files.



As a system administrator, you can export a sync package from the Sync logs list. This sync package can contain one or more outbreaks or one or more datasets within an outbreak. Additionally, you can specify the date range for the sync package you are exporting.

While making selections in the Download sync package screen, you can make a selection in the **Collections** field to quickly select a predefined dataset. If you make a selection in the **Export type** field, you cannot make a selection in the Collections field.

Finally, you can enter an encryption password to encrypt the data within the sync package.

To import a sync package

1. Select **Menu > Sync**.

   Go.Data displays the Sync logs list.
2. Click the **Quick actions** button.
3. Click **Import sync package**.

   Go.Data displays the Import sync package screen.
4. Click the **Browse** button and select the sync package file from your local machine.
5. Click the **Open** button.
6. If required, enter a password in the **Decrypt password** field.
7. Click the **Import file** button.

   Go.Data displays a confirmation message.

To export a sync package

1. Select **Menu > Sync**.

   Go.Data displays the Sync logs list.
2. Click the **Quick actions** button.
3. Click **Export sync package**.

   Go.Data displays the Export sync package screen.

4. Complete the Download sync package fields.
    - **As type**: Select a file format for the sync package file.
    - **From date**: Select a date range for the sync package file.
    - **Outbreaks**: Select the outbreaks to be included in the sync package.
    - **Export type**: Select a type of sync package. If you make a selection in the **Export type** field, you cannot make a selection in the **Collections** field.
    - **Collections**: Select a predetermined dataset to include in the sync package. If you leave this field empty, all data is included in the sync package.
    - **Encryption password**: Enter a password to encrypt the data within the sync package. This password is required to import the sync package.
5. Click **Export**.

    Go.Data exports the data.

Removing and deleting sync logs

Over time, the Sync log lists may become cumbersome to manage. Subject to your user permissions, you can remove sync logs from view based on a specific server URL or delete sync logs individually.

To remove all sync logs for a server

1. Select **Menu > Sync**.

   Go.Data displays the Sync logs list.
2. Click the **Quick actions** button.
3. Click **Remove sync logs**.

   Go.Data displays the Remove sync logs screen.
4. Make a selection in the **Server URL** field.
5. Click **Delete**.

   Go.Data displays a confirmation message.

To delete sync logs individually

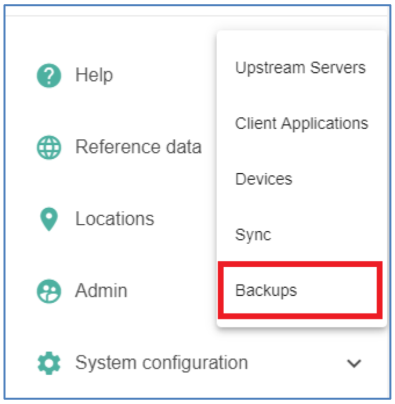
1. Select **Menu > Sync**.

   Go.Data displays the Sync logs list.
2. Hover over a sync log and click the **Options** icon.
3. Select **Delete**.

   Go.Data displays the Are you sure you want to delete this log message.
4. Click **YES**.

   Go.Data displays a confirmation message.

Backing up and restoring



Go.Data is responsible for storing sensitive data and information during an outbreak. Additionally, Go.Data contains system configurations that are critical for managing an outbreak. As a result, Go.Data has functionality for backing up and restoring data, information, and configurations.

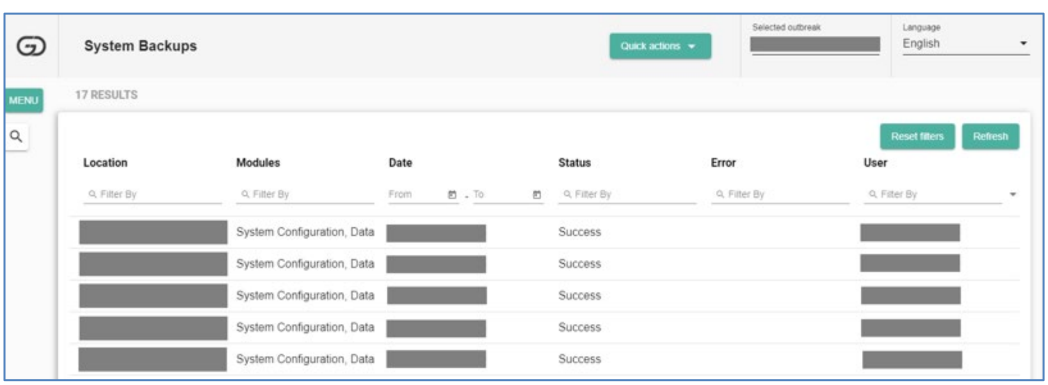
A user with system administrator-level credentials can view and manage Go.Data's backup and restoration features. This functionality includes viewing backup records, viewing backup records' location information, restoring backups, configuring automatic backup settings, manually creating backups, and deleting backups.

Actions related to Go.Data's backup and restoration features begin from the System backups list, which is a single location to view all backup records for an instance of Go.Data.

For information on including your backups folder in your preferred cloud backup service, see Viewing personal cloud backup locations.

System backups list

Viewing all backup records at one time allows you to review the backup history for your instance of Go.Data. The System backups list provides a single location to view all backup records, restore data from a specific backup record, configure automatic backups, manually create backups, and delete backup records.



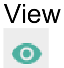
By default, the system backups list shows all backup records available within your instance of Go.Data. The backup records include identifying information about a backup, including its storage location, modules, date, status, error, and user who created the backup.

This list uses standard functionality as defined in Working with lists. In addition, this list contains functionality specifically related to backups.

System backups list field definitions

Item	Description
Location	The location where the backup is stored.
Modules	The modules included within the backup.
Date	The date the Go.Data user created the backup.
Status	Indicates whether a backup was created successfully or if it failed.
Error	The error determining why the backup creation failed.
User	The Go.Data user who created the backup.

System backups list actions

Item	Description
Quick Actions 	This button opens a menu from which you may choose additional actions related to backups.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to the backup selected.
Restore backup 	This hover action allows you to manually begin restoring data from the selected backup.
View backups folder 	This hover action allows you to view the complete address where the backup is stored.

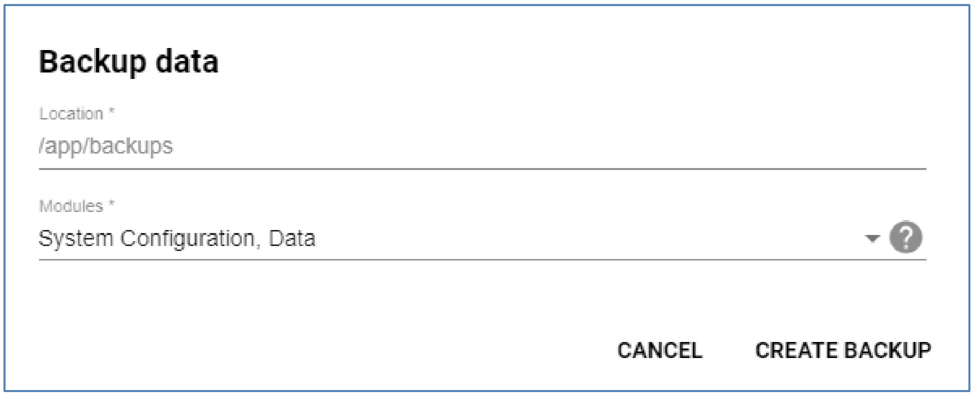
To view backups

1. Select **Menu > System configuration > Backups**.

   Go.Data displays the System backups list.

Creating full system backups

A system administrator can manually create a full system backup of an instance of Go.Data at any time.



When creating a full system backup, you can choose to back up system configuration data, outbreak data, or both. In addition, you can define the location address where the system saves the backup.

To create a full system backup

1. Select **Menu > System configuration > Backups**.

   Go.Data displays the System backups list.
2. Click the **Quick actions** button.
3. Click **Create backup**.

   Go.Data displays the Backup data screen.
4. Complete the Backup data screen fields.

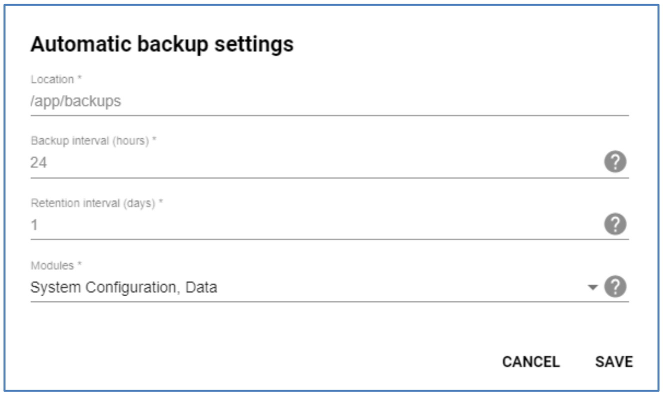
   - **Location**: Enter a location in which to store the backup.
   - **Modules**: Select the modules to be included in the backup.

5. Click **Create backup**.

   Go.Data displays a confirmation message.

Configuring automatic backups

As a system administrator, Go.Data contains functionality for you to schedule automatic backups.



Using this functionality, you can schedule automatic backups to occur based on a designated number of hours. You can also define where the system stores the automatic backup, the number of days the system stores the automatic backup, and if the system includes system configuration, data, or both in the automatic backup.

To set up an automatic backup

1. Select **Menu > System configuration > Backups**.

   Go.Data displays the System backups list.
2. Click the **Quick actions** button.
3. Click **Automatic backup settings**.

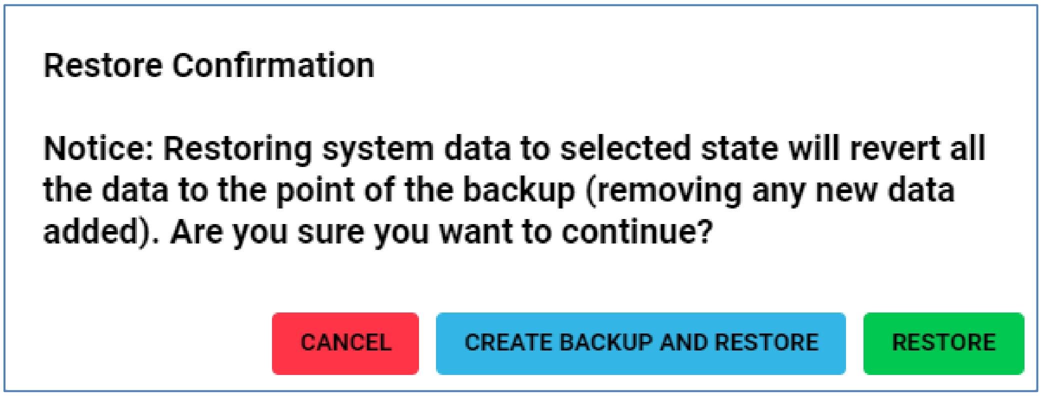
   Go.Data displays the Automatic backup settings screen.
4. Complete the Automatic backup settings fields.
   - **Location**: Enter a location in which to store the backup.
   - **Backup interval (hours)**: Enter a duration, in hours, for Go.Data to automatically back up data.
   - **Retention interval (days)**: Enter a duration, in days, specifying how long the backup file should be stored.
   - **Modules**: Select the modules to be included in the backup.
5. Click **Save**.

   Go.Data displays a confirmation message.

Restoring Go.Data from backup

WARNING	Restoring Go.Data from a backup overwrites all information in Go.Data at the time of the restore. You will lose any data entered since the selected backup was created.

As a system administrator, you can restore Go.Data to a previous state from a backup file at any time from the Systems backup list.



To restore Go.Data from a backup file

1. Select **Menu > System configuration > Backups**.

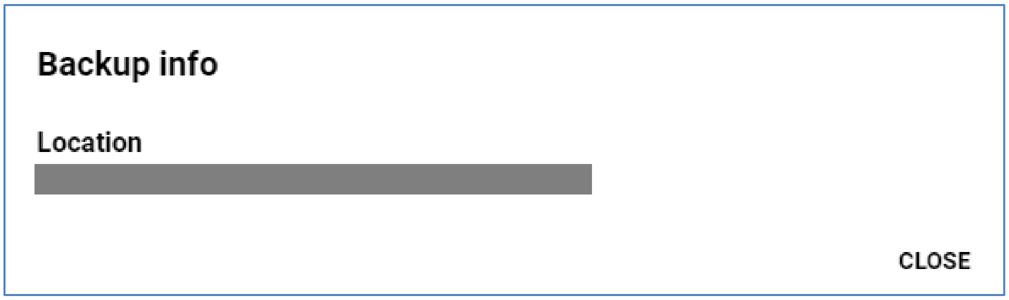
   Go.Data displays the System backups list.
2. Hover over a backup you wish to restore from and click the **Restore backup** icon.

   Go.Data displays the Restore confirmation message.
3. Click **Restore**.

   Go.Data displays a confirmation message.

Viewing backup location information

At any time during an outbreak, you may wish to see where the system is storing a backup file. Go.Data provides simple functionality for reviewing backup location information.



To view backup location information

1. Select **Menu > System configuration > Backups**.

   Go.Data displays the System backups list.
2. Hover over a backup you wish to restore from and click the **View backups folder** icon.

   Go.Data displays the Backup info screen.

Deleting backups

Subject to your user permissions, you can delete a backup at any time. When you delete a backup, you cannot restore system configuration information or data from that specific point in time.

To delete a device

1. Select **Menu > System configuration > Backups**.

   Go.Data displays the System backups list.
2. Hover over a backup and click the **Options** icon.
3. Select **Delete backup**.

   Go.Data displays the Are you sure you want to delete this backup message.
4. Click **YES**.

   Go.Data displays a confirmation message.

Chapter 17 – Administering roles and user accounts

Users with System administrator or User manager privileges can use the Admin section of the menu to administer roles and users in Go.Data. Within their instance of Go.Data, these people can work with preset roles, define custom roles, set up and manage users, and add and manage roles assigned to the user accounts.

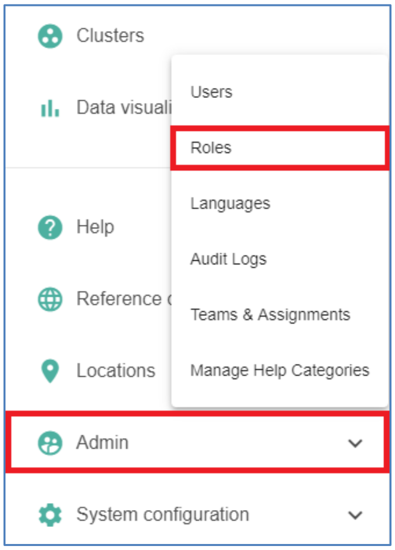
A user role is a collection of system permissions that governs how a user account may use Go.Data.

A user account is the profile of a user who has access to the Go.Data application.

When managing a Go.Data instance, the roles generally are established first, and then user accounts are created and assigned one or more roles. Roles, within certain restrictions, and user accounts can be updated at any time.

Chapter Contents

Introduction to user roles



To effectively manage an outbreak and an instance of Go.Data, a User manager can view, define, and manage roles that map to user permissions within that instance. A user role is a collection of system permissions that governs how a user account may use Go.Data. These roles are then assigned to user accounts, which control the access that users have to the Go.Data application and information, including personal health information.

User roles are one of these primary types:

- **System roles**: user roles that are preprogrammed into Go.Data by default. These roles may not be modified or deleted.
- **Custom roles**: user-created roles that define the permissions granted to each role on an individual basis.

Roles are standalone and do not inherit permissions from other roles. For example, a system administrator does not necessarily have permission to see the personal health data that a contact tracer might.

By default, Go.Data is preprogramed with these types of system roles:

- **System administrator**: manages user accounts and configuration of the Go.Data system.
- **Outbreaks and templates administrator**: configures Go.Data for a specific outbreak.
- **Epidemiologist**: analyses data to understand disease evolution and inform response.
- **Data exporter**: provides support and coordinates the collection of all data related to the outbreak.
- **Contact tracing coordinator**: coordinates the work of multiple contact tracers.
- **Contact tracer**: follows up with contacts and monitors their health.
- **Help content manager**: manages help content within Go.Data.
- **Data viewer**: manages the reports and data within Go.Data.
- **User manager**: manages users and user permissions.
- **Laboratory data manager**: manages lab results data for an outbreak.
- **Default minimum backup access**: provides the minimum permissions for a user to access backups.
- **Reference data manager**: manages icons, locations, and reference data.
- **Data visualisation**: manages data related to visualising chains of transmission.

If you are a user with a User manager privileges, you can view system user roles in Go.Data. You can view role name, brief description, list of role permissions, and users in your instance of Go.Data assigned to the role.

As a User manager you can, however, create new user roles from start or clone and customise existing roles with customized permissions for your instance of Go.Data.

Most actions related to roles start from the Roles list or Roles details, including adding new roles and modifying custom roles.

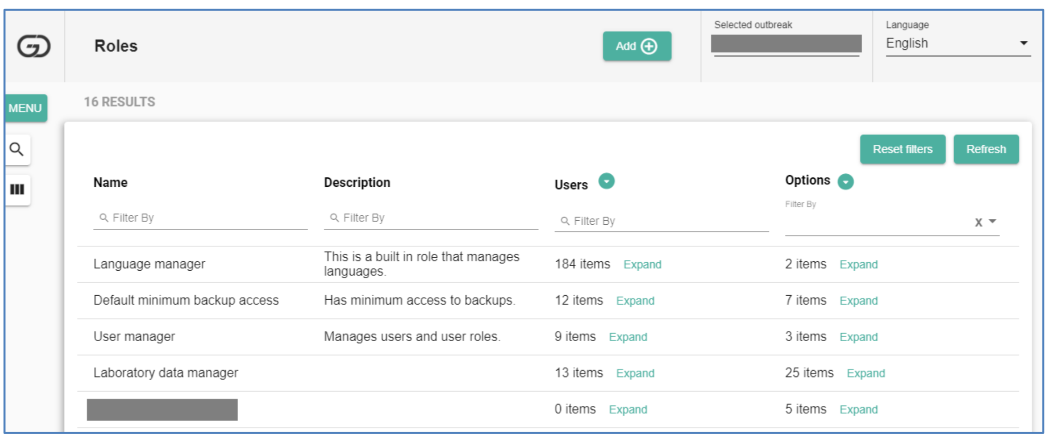
- **Roles list**: a single location to view all existing user roles in Go.Data.
- **Roles details**: a single location to view individual role information and user role privilege definitions.

Roles list

Viewing all user roles is essential for managing individual users in an instance of Go.Data. By viewing all user roles, you can understand the types of permission levels granted to Go.Data users.

You can also view permission definitions for any custom roles that User managers have created in your instance of Go.Data.

This Roles list provides a single location to view all user roles defined in your instance of Go.Data, as well as to add new, modify, and delete custom user roles.



By default, the Roles list displays all user role records. The user role records include identifying details about a role, including name, description, and permissions.

Using filters, you can edit the types of roles displayed in the Roles list.

This list uses standard functionality as defined in Working with lists.

Roles list field definitions

Item	Description
Name	The identifying name of the user role in Go.Data.
Description	A brief overview of the user role and its use.
Users	A list of users assigned to that role.

Item	Description
Options	The permissions granted to a specific user role.

Roles list actions

Item	Description
Add + Add ⊕	This button allows you to add a new role to Go.Data.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to the role selected.
Modify role	This hover action opens the role entry selected so you may update the entry.
View role	This hover action opens the role entry so you may view the entry's information.
Show/Hide	This button opens a menu from which you may choose to show all items or hide all items in that column.
Expand Expand	This button allows you to expand one set of items at a time to show all of the associated entries.
Collapse Collapse	This button allows you to collapse one set of items at a time.

To view all roles

1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.

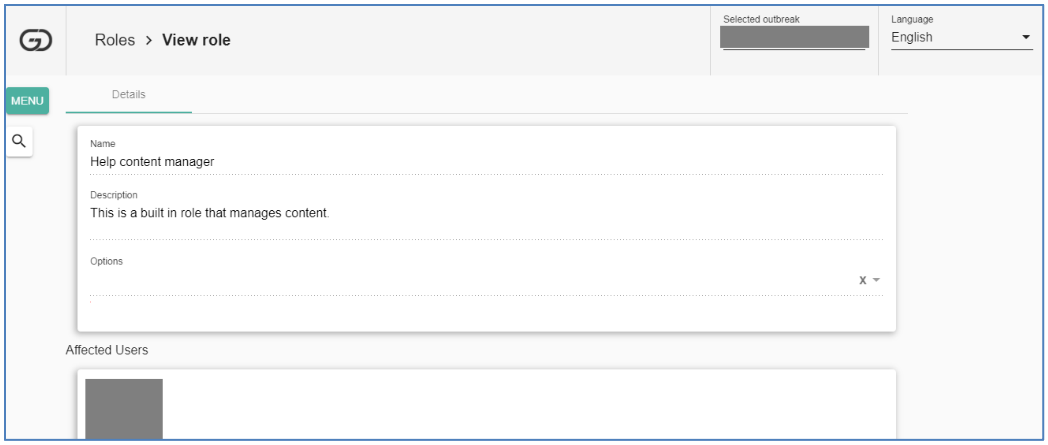
Roles details

Viewing individual roles allows you to review the permissions granted to each user role type in Go.Data. By viewing individual roles, you can also determine the permission definitions granted to custom user role types by Go.Data User managers.

Roles details provides a single location to view the individual name, description, and permissions for a user role in Go.Data. In addition, you can edit custom user role field definitions from the Roles details view. You may not edit system roles.

Details tab

The Details tab includes fields for defining a role entry's identifying information.



To view a role

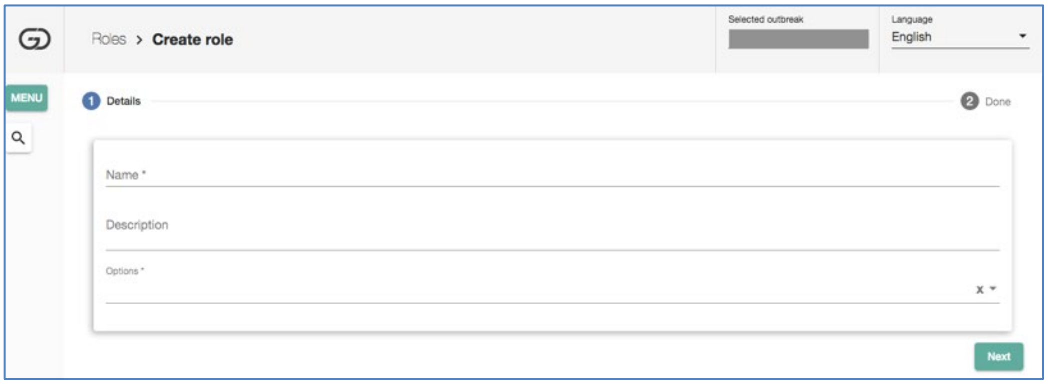
1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.
2. Hover over a role and click the **View role** icon.

   Go.Data displays Roles details.

Adding or modifying custom roles

During an outbreak, you may wish to limit the information certain users can view, add, modify, or delete in Go.Data. A user with User manager privileges can add or modify custom roles at any time in Go.Data. Any changes made to roles impacts the way the system manages users and associated permissions.



You must complete or update the fields on the Roles details tab when adding new roles or modifying existing roles. You cannot edit Go.Data predefined user roles.

Go.Data provides sets of predefined permissions, grouped by system area. User managers can use these sets to populate custom user roles. This features makes creating consistent user roles easier and ensures that you have the most appropriate permissions without missing any.

By default, only the system version permission and no other permissions are checked.

Choosing partial permissions for a system area allows you to choose from a number of options for the particular area. For example, under Backups, you could check **Backup – view** and **Backup – create**, but not **Backup – delete**, which means that any user assigned to the new role could view or add backups, but not delete them.

You can also add all permissions for a system area, which means that any future permission added will also be included. This feature is helpful so you do not have to go back and constantly check your permissions lists in case of system updates.

To add a custom role

1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.
2. Click the **Add+** button.

   Go.Data displays Roles details.
3. Complete the Details tab.

   - **Name**: Enter a name for the user role. Required.
   - **Description**: Enter a brief overview of the user role and its use.
   - **Options**: Select the permissions to grant to a specific user role. Required.
4. If Go.Data displays the check dependencies message, do one of the following:

   - To ensure that all dependences are checked, click **Check all**.
   - To skip checking dependences, click **Don't check anything**.

5. Click the **Next** button.

   Go.Data displays the data entry complete message.
6. Click the **Create role** button.

   Go.Data displays the Roles details for the newly defined custom role.

To modify a custom role

1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.
2. Hover over an existing role and click the **Modify role** icon.

   Go.Data displays Roles details.
3. Update the Details tab.
   - **Name**: Enter a name for the user role. Required.
   - **Description**: Enter a brief overview of the user role and its use.
   - **Options**: Select the permissions to grant to a specific user role.
4. If Go.Data displays the check dependencies message, do one of the following:
   - To ensure that all dependences are checked, click **Check all**.
   - To skip checking dependences, click **Don’t check anything**.
5. Click the **Save** button.

   Go.Data displays the data entry complete message and the Roles details for the modified custom role.

Cloning custom roles

You may need to generate a custom role that is the same or very similar to an existing role. Go.Data has the functionality to create an identical copy of an existing role, which you can then modify as needed.

For more information on the role fields, see Adding or modifying custom roles.

To clone a custom role

1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.
2. Hover over the custom role you wish to delete and click the **Options** icon.
3. Select **Clone role**.

   Go.Data displays Roles details with the Name field blank and the other fields as in the original role.
4. Update the Details tab.
   - **Name**: Enter a name for the user role. Required.
   - **Description**: If desired, update the brief overview of the user role and its use.
   - **Options**: If desired, update the permissions to grant to a specific user role. Required.
5. If Go.Data displays the check dependencies message, do one of the following:
   - To ensure that all dependences are checked, click **Check all**.
   - To skip checking dependences, click **Don't check anything**.
6. Click the **Next** button.

   Go.Data displays the data entry complete message.
7. Click the **Create role** button.

   Go.Data displays the Roles details for the newly defined custom role.

Deleting custom roles

Subject to your permissions, you can delete a custom role at any time. When you delete a custom role, you remove the role and no longer can add users to it.

To delete a custom role

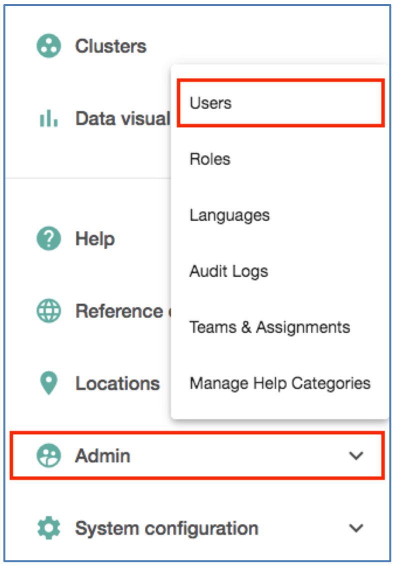
1. Select **Menu > Admin > Roles**.

   Go.Data displays the Roles list.
2. Hover over the custom role you wish to delete and click the **Options** icon.
3. Select **Delete role**.

   Go.Data displays the Are you sure you want to delete this role? message.
4. Click **YES**.

   Go.Data displays the Role deleted message.

Introduction to user accounts



As part of managing an outbreak and an instance of Go.Data, a User manager or a System administrator can view, add, and manage user accounts. A user account is the profile of a user who has access to the Go.Data application.

User accounts are used throughout Go.Data, for example, in drop-down lists used during team assignment. All user account access to Go.Data and data contained in a specific instance of Go.Data is managed through assigning roles to the user account.

If you are a user with User manager or System administrator privileges, you can view all user accounts in your instance of the Go.Data application.

At any time, you can add or modify user accounts. For existing user accounts, you can update user access to available outbreaks and set the active outbreak. You can update their role assignment(s).

When a user forgets their password and is unable to use the Forgot password feature, you can reset their password for them.

You can delete user accounts thus preventing those users from accessing the Go.Data application.

Finally, users with System admin privileges can reset the admin account password for their instance of Go.Data.

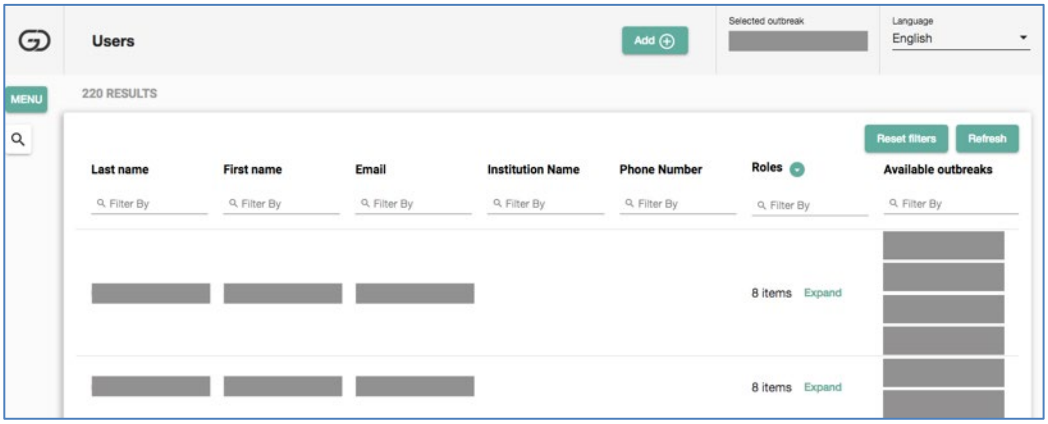
Most actions related to users start from one of these views.

- **Users list**: a single location to view all existing users in Go.Data.
- **Users details**: a single location to view individual user information.

Users list

Viewing all user accounts is essential for managing individual users across an instance of Go.Data. By viewing all user accounts at one time, you can see who has access to your instance of Go.Data and the outbreaks and roles granted to each user.

This Users list provides a single location to view all users defined in your instance of Go.Data, as well as to add new, modify, and delete users. You can view, but not modify or delete, your own user account from the Users list.



By default, the Users list displays all user records. The user records include identifying details about a user, including name, contact information, roles, available and active outbreaks, and password.

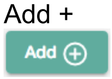
Using filters, you can edit the users displayed in the Users list.

This list uses standard functionality as defined in Working with lists.

Users list field definitions

Item	Description
Last name	The family name of the user.
First name	The given name of the user.
Email	The email address associated with the user profile, which is used as the login name and for email password recovery.
Institution name	The name of the organization associated with the user.
Phone number	The telephone number associated with the user.
Roles	The type of permissions granted to the user.
Available outbreaks	The outbreaks to which the user has access in Go.Data. By default, when no outbreaks are selected in the list all outbreaks are displayed, depending on their role.
Active outbreak	The outbreak currently active, which is displayed under the **Selected outbreak** at the top right of Go.Data.

Users list actions

Item	Description
Add + 	This button allows you to add a new user to Go.Data.

Item	Description
Options (Ellipsis menu) ⋮	This hover action opens a menu from which you may choose additional actions related to the user selected.
Modify user	This hover action opens the user entry selected so you may update the entry.
View user	This hover action opens the user entry so you may view the entry's information.
Show/Hide	This button opens a menu from which you may choose to show all roles or hide all items in that column.
Expand Expand	This button allows you to expand one set of items at a time to show all of the associated entries.
Collapse Collapse	This button allows you to collapse one set of items at a time.

To view all users

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.

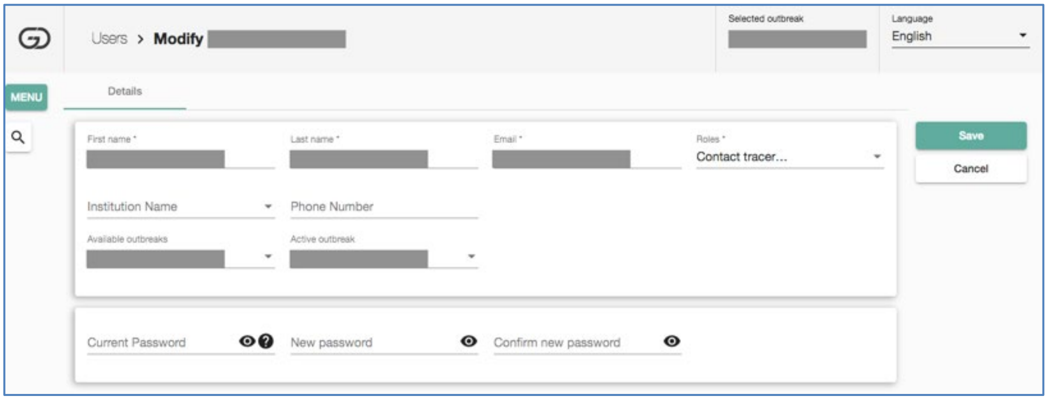
Users details

Viewing individual user accounts allows you to review general information about the user's access and permissions in the instance of Go.Data.

Users details provides a single location to view a user's contact information, roles granted, information about the active and available outbreaks, and the password.

Details tab

The Details tab includes fields for identifying users, controlling user access to tasks and outbreaks, and password management.



To view a user

1. Select **Menu > Admin > Users**.

   Go.Data displays the **Users** list.
2. Hover over a user and click the **View user** icon.

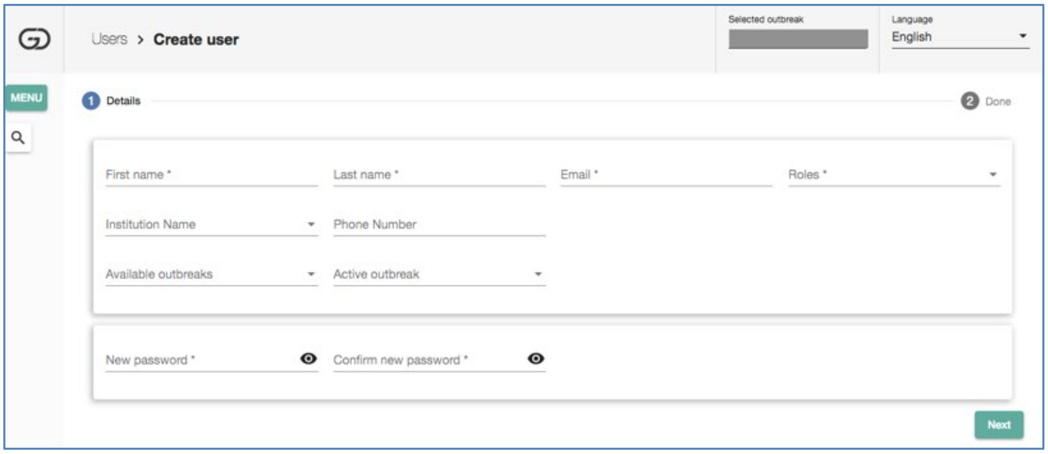
   Go.Data displays Users details.

NOTE	To display the password in clear text, click the **Show Password i**con. To hide the password, click the icon a second time.

Adding or modifying user accounts

Creating and managing user accounts is a key administrative feature of Go.Data. Sensitive information is collected during outbreaks and ensuring access to the Go.Data application is limited to the correct people is essential for the security of this information.

A user with User manager or a System administrator privileges can manage user accounts at any time in their instance of Go.Data.



To add a user account, you enter the user's identifying and contact information, assign one or more roles to the account, choose the list of available outbreaks and assign the active outbreak, and set an initial password.

In addition to the user's name and other contact information, the email address they provide must be unique within Go.Data. This email address is used as their login name and for password recovery in case they need to have their password reset.

You must also assign at least one role to the user. Roles determine what access the user has to Go.Data features and data.

The available and active outbreaks options determine what outbreaks a user is allowed to access and which outbreak is the current one. When setting up the user account, you may choose one or more available outbreaks. By default, no outbreaks are selected, which means Go.Data displays all outbreaks if the user's assigned role or roles allows them to see outbreaks. The user can switch the active outbreak to any outbreak they have available for their user account.

Finally, when creating a new account, you must create the initial password and email it to the user at the email address provided for the profile. The system requests users change this initial password upon first login. Go.Data requires that all passwords contain at least 12 characters. Go.Data does not enforce additional password requirements, such as using special characters.

To add a user account

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Click the **Add+** button.

   Go.Data displays Users details.
3. Complete the Details tab.

   - **Last name:** Enter the family name of the user. Required.
   - **First name**: Enter the given name of the user. Required.

- **Email**: Enter the email address associated with the user profile, which is used as the login name and for email password recovery. Required.
- **Institution name**: Choose the name of the organization associated with the user.
- **Phone number**: Enter the telephone number associated with the user.
- **Roles**: Choose one or more types of permissions granted to the user. Required.
- **Available outbreaks**: Choose one or more outbreaks to which the user has access in Go.Data. By default, when no outbreaks are selected in the list all outbreaks are displayed, depending on their role.
- **Active outbreak**: Choose the outbreak currently active.
- **New password**: Enter a new password. Required.
- **Confirm new password**: Enter the exact password you entered in the **New password field**. This field is used to confirm typing accuracy and recall of the new password. Required.

4. Click the **Next** button.

   Go.Data displays the data entry complete message.
5. Click the **Create user** button.

   Go.Data displays the Users details for the newly created user account.

To modify a user account

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Hover over an existing user account and click the **Modify user** icon.

   Go.Data displays Users details.
3. Update the Details tab.
4. Click the **Save** button.

   Go.Data displays the data entry complete message and the Users details for the modified user account.

Adding or removing roles assigned to user accounts

You can add or remove a user’s assigned roles at any time during an outbreak. Changing the user’s assigned roles automatically and instantly gives or takes away the user’s access to the relevant parts of Go.Data, including functions and data.

To add or remove a role assigned to a user account

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Hover over an existing user account and click the **Modify user** icon.

   Go.Data displays Users details.
3. Update the Details tab.

   - **Roles**: Choose one or more types of permissions granted to the user. Required.
4. Click the **Save** button.

   Go.Data displays the data entry complete message and the Users details for the modified user account.

Adding or modifying access to outbreaks

You can add or remove a user’s available outbreaks at any time. You can also change the active outbreak for the user at any time.

By default, if no available outbreak is chosen, the user can see all outbreaks if the role(s) they are assigned allows them to.

For example, if the available outbreaks option is left blank for a user and the user is an epidemiologist, they see all outbreaks. If the available outbreaks are left blank and the user is a language manager, they see no outbreaks. Epidemiologists have access to the outbreaks features, whereas language managers do not.

To change a user access’s to outbreaks

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Hover over an existing user account and click the **Modify user** icon.

   Go.Data displays Users details.
3. Update the Details tab as necessary.

   - **Available outbreaks**: Choose one or more outbreaks to which the user has access in Go.Data. By default, when no outbreaks are selected in the list all outbreaks are displayed, depending on their role.
   - **Active outbreak**: Choose the outbreak currently active.
4. Click the **Save** button.

   Go.Data displays the data entry complete message and the Users details for the modified user account.

Resetting user passwords

Any user can change their personal Go.Data password at any time, regardless of their assigned role in Go.Data. The Go.Data application provides a number of ways for users to manage their own passwords, including changing the password upon first login as well as subsequent logins and recovering a lost password.

Inevitably, however, users need assistance resetting passwords. Users with System administrator or User manager privileges can reset the password of any user within their instance of Go.Data.

Go.Data requires that all passwords contain at least 12 characters. Go.Data does not enforce additional password requirements, such as using special characters.

After you reset the user's password, you must email the new password to the user at the email address provided in the user profile.

For more information on helping users manage their own passwords, see Creating a new password(when logging in the first time only), Changing passwords, or Using the Forgot password feature.

To reset a user password

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Hover over a user account and click the **Modify user** icon.

   Go.Data displays Users details.
3. Update the Details tab.

   - **Current password**: Enter the user's current Go.Data password. Required.
   - **New password**: Enter a new password. Required.
   - **Confirm new password**: Enter the exact password you entered in the **New password** field. This field is used to confirm typing accuracy and recall of the new password. Required.

NOTE	To display the password in clear text, click the **Show Password i**con. To hide the password, click the icon a second time.

4. Click the **Save** button.

   Go.Data displays the data entry complete message and the Users details for the modified user account.

Deleting user accounts

Subject to your permissions, you can delete a user account at any time. When you delete a user account, the user can no longer access the Go.Data application.

To delete a user account

1. Select **Menu > Admin > Users**.

   Go.Data displays the Users list.
2. Hover over the user account you wish to delete and click the **Options** icon.
3. Select **Delete user**.

   Go.Data displays the Are you sure you want to delete this user? message.
4. Click **YES**.

   Go.Data deletes the user and displays the User deleted message.

Resetting administration passwords

In the event of a catastrophic password loss, users with System administrator privileges can reset the admin password.

On Windows, right-click on the **Go.Data** icon in the Windows tray and select **Reset Admin Password**.

On Mac, click the **Go.Data** icon in the Mac menu bar and click **Reset Admin Password.**

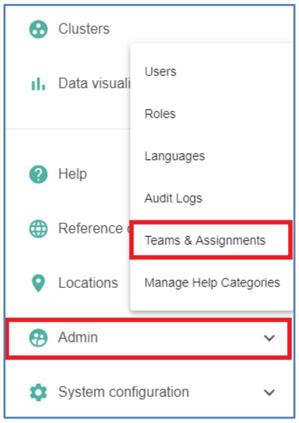
Chapter 18 – Managing teams and assignments

Teams and assignments are essential for managing contact follow-up activities during an outbreak. In addition, Contact tracing coordinators need to review active assignments to manage workloads for teams.

Within Go.Data, you can create teams, assign users to teams, and assign teams to geographic locations. When new follow-up activities are created for a location, Go.Data automatically assigns the follow-up activities to the team assigned to the location.

A user with System administrator or Contact tracing coordinator privileges can view and manage teams and assignments. In addition, users with these privileges can add teams, modify teams, view workloads, and delete teams.

Introduction to teams and assignments



Go.Data provides functionality for assigning users to teams for the purposes of contact tracing and follow-up workload management. Additionally, as a System administrator or Contact tracing coordinator, you can assign teams to a specific geographic location. As contact follow-up activities are added for a particular location, Go.Data automatically assigns follow-up activities to the team assigned to the location.

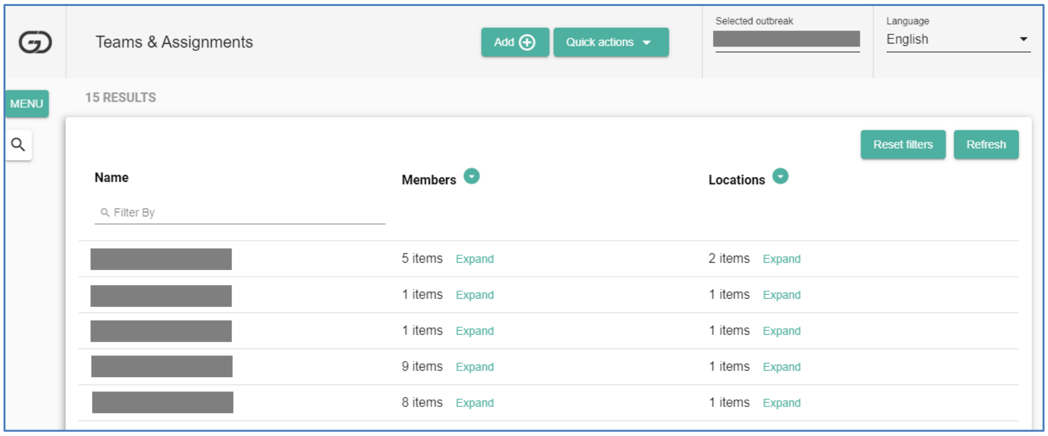
A user with System administrator or Contact tracing coordinator privileges can add, modify, and delete teams. Additionally, users with these permissions can view workloads.

Actions related to viewing, adding, and modifying teams and assignments begin from the Teams and assignments list.

- **Teams and assignments list:** a single location to view all teams for an instance of Go.Data.
- **Teams and assignments details**: a single location to view team information, such as assigned users and locations.
- **Teams workload dashboard**: a single location to view the assignment workloads for teams in your instance of Go.Data.

Teams and assignments list

Viewing all teams at one time allows you to review the teams created within your instance of Go.Data. The Teams and assignments list provides a single location to view all teams, add and modify teams, view a team's members, and view a team's assigned locations.



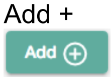
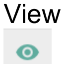
By default, the Teams and assignments list shows all teams available within your instance of Go.Data.

This list uses standard functionality as defined in Working with lists.

Teams and assignments list field definitions

Item	Description
Name	The given name of a team.
Members	A list of members assigned to a team.
Locations	A list of geographic locations assigned to a team.

Teams and assignments list actions

Item	Description
Add + 	This button allows you to add a new team to Go.Data.
Quick actions 	The button opens a menu from which you may choose additional actions related to teams.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to the team selected.
Modify team 	This hover action opens the team selected so you may update the entry.
View team 	This hover action opens the team record so you may view the team's information.
Show/Hide 	This button allows you to show or hide all members or all locations for all teams at one time.

Item	Description
Expand Expand	This button allows you to view all members or locations for a team.
Collapse Collapse	This button allows you to hide all members or locations for a team.

To view all teams

1. Select **Menu > Admin > Teams & Assignments**.

   Go.Data displays the Teams and assignments list.

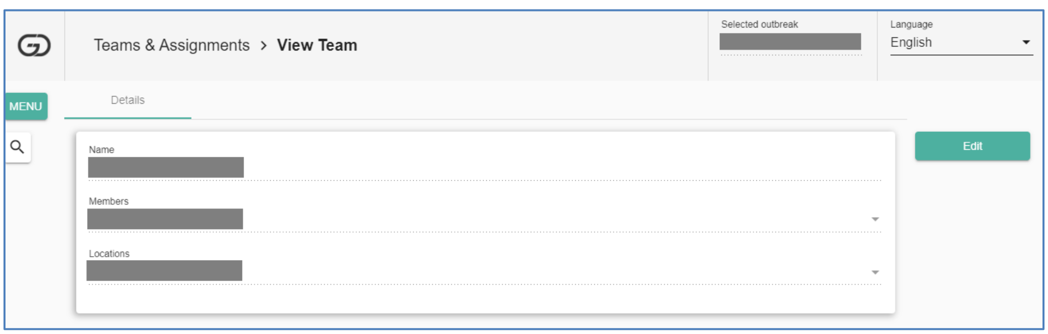
Teams and assignments details

Teams and assignments details provides one location to view the recorded and assigned details for a team. In addition, you can complete actions related to a team in Go.Data, such as modifying a team's assigned users or assigned locations.

The information recorded on the Teams and assignments details tab is used to assign new follow-ups during an outbreak.

Details tab

The details tab includes fields for team's identifying and assignment information.



To view a team

1. Select **Menu > Admin > Teams & Assignments**.

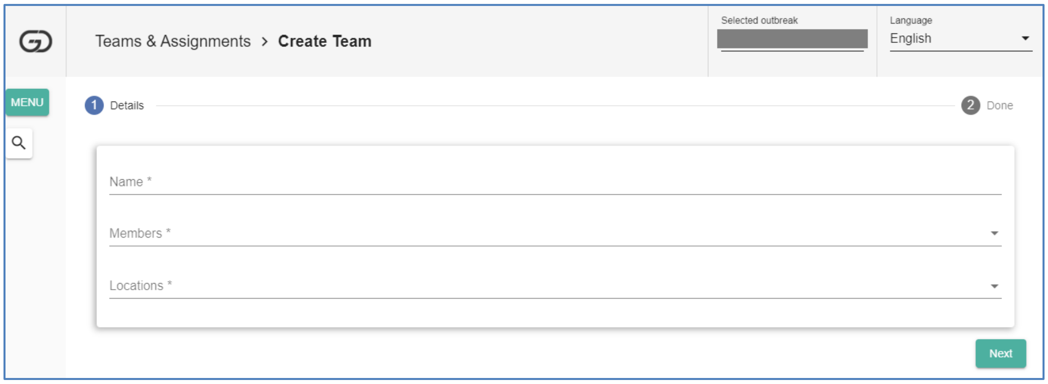
   Go.Data displays the Teams and assignments list.

2. Hover over a team and click the **View team** icon.

   Go.Data displays Team details.

Adding or modifying teams and assignments

Any user with System administrator or Contact tracing coordinator privileges can add or modify teams and assignments at any time in their instance of Go.Data. Any changes to member and location assignments change how Go.Data assigns contact follow-ups.



You must complete the fields on the Teams and assignments details tab when adding new teams or modifying existing teams.

When completing the Teams and assignments details fields, it is possible to select members who have already been assigned to an existing team. Go.Data displays a confirmation message if you add a member with an existing team assignment.

In addition, you can assign more than one location to a team. Go.Data displays a confirmation message when you click the **Create team** button if you add a location to a team that has already been assigned to a team.

To add or modify a team

1. Select **Menu > Admin > Teams & Assignments**.

   Go.Data displays the Teams and assignments list.
2. To add a new team, click the **Add+** button. To modify an existing team, hover over a team and click the **Modify team** icon.

   Go.Data displays Teams and assignments details.
3. Complete the Details tab.

   - **Name**: Enter a name for the team. Required.
   - **Members**: Select users to assign to the team from the drop-down list. Required.
   - **Locations**: Select locations to assign to the team from the drop-down list. This list displays locations based on the hierarchical location tree. To select specific locations, select the parent location first, then click the field again to display a list of more specific locations. Additionally, you can begin typing a location name, which will appear in the list for you to select. Required.
4. Click the **Next** button.

   Go.Data displays a data entry completed message.
5. Click the **Create team** button.

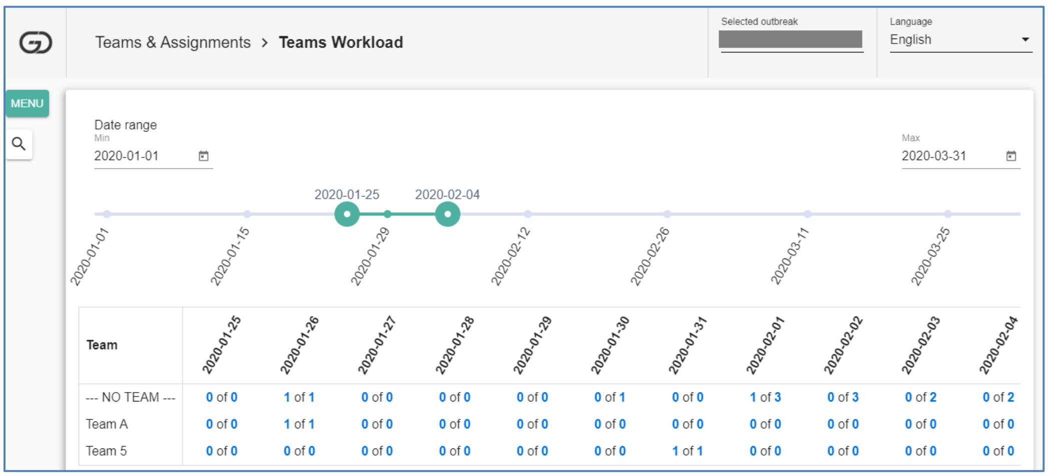
   Go.Data displays the Teams and assignments details.

Viewing workloads

Go.Data provides functionality for you to view teams' contact follow-up workloads for a particular date range via the Teams workload dashboard. Additionally, you can view the number of follow-ups completed out of the follow-ups assigned by date for a team.

The Teams workload dashboard contains two display items.

- **Teams workload timeline**: a timeline defined by a minimum and maximum date range containing two points that you can click and drag to change the information displayed by the Teams workload table.
- **Teams workload table**: a table that displays the number of follow-ups completed out of the number of follow-ups assigned to all teams for a specific date range.



You can click a number in the Teams workload table to view the Follow-ups for related contacts list for a specific team for a specific date.

To view workloads

1. Select **Menu > Admin > Teams & Assignments.**

   Go.Data displays the Teams and assignments list.
2. Click the **Quick actions** button.
3. Select **Workload.**

   Go.Data displays the Teams workload dashboard.

Deleting teams

Subject to your user permissions, you can delete teams. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

To delete a team

1. Select **Menu > Admin > Teams & Assignments**.

   Go.Data displays the Teams and assignments list.
2. Hover over the team you wish to delete and click the **Options** icon.
3. Click **Delete team**.

   Go.Data displays the Are you sure you want to delete this team? message.
4. Click **YES**.

   Go.Data deletes the team and displays a confirmation message.

Chapter 19 – Managing reference data

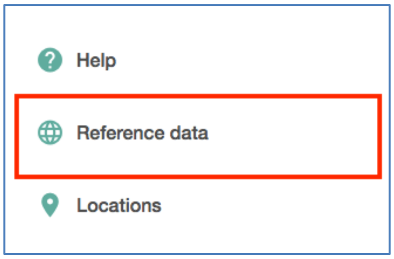
Reference data is critical for tracking outbreaks and for customizing Go.Data installations for your particular needs. Additionally, reliable reference data is important for working with cases, events, and following up with contacts and is used throughout Go.Data.

Reference data includes categories and category entries for both system and custom data. System reference data includes the items that are integral to the Go.Data application. Custom reference data includes the items that you can create specific to your installation of Go.Data.

A user with Reference data manager privileges can view system reference data. A Reference data manager can also view, add, modify, and delete custom reference data within a specific instance of Go.Data. You can also manage icons associated with the reference data entries. Additionally, depending on your user permissions, Go.Data allows you to import and export reference data.

Chapter Contents

Introduction to reference data



Go.Data relies on reference data to populate fields in which users have a constrained choice of responses, such as entries in drop-down lists. Reference data also includes icons and colours associated with data.

Using preset options has several benefits, including consistent set up of outbreaks and assurance that data collected can be evaluated efficiently. Reference data is used, for example, when creating the visualisations of the chains of transmission or when rendering bar charts.

Reference data is one of these primary types:

- **System reference data**: reference data that is defined within the Go.Data application itself, that has associated business rules, and that users may not change.
- **Custom reference data**: reference data that is used throughout a particular instance of Go.Data and may be viewed, added, modified, and deleted by a Reference data manager.

Reference data includes categories, category entries, icons, and colours. Categories are system data and may not be changed. Category entries, icons, and colours, however, are custom reference data and may be added or managed by Reference data managers.

Location reference data is a special type of reference data. For more information, see Introduction to location data.

Reference data is available in all languages that the Go.Data interface supports.

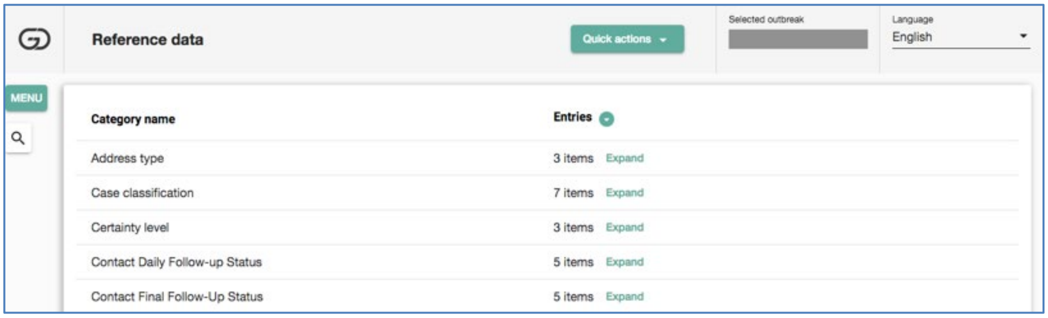
Reference data managers may also import and export reference data, ensuring that multiple copies of Go.Data stay in sync.

Actions related to reference data start from one of the following.

- **Reference data list**: a single location to view all reference data categories and associated entries for an instance of Go.Data.
- **Reference data category list**: a single location to view all the entries for a single reference data category for one instance of Go.Data.
- **Reference data entry details**: a single location to view individual reference data entry information.

Reference data list

Viewing all reference data categories and associated entries at one time allows you to easily view the reference data stored within your instance of Go.Data. The Reference data list provides a single location to view all categories and associated entries, manage icons, and import and export reference data.



By default, the Reference data list shows all data categories and associated entries available within your instance of Go.Data.

This list uses standard functionality as defined in Working with lists.

Reference data list field definitions

Item	Description
Category name	The name of a reference data category.
Entries	The number of entries for each category. When expanded, this column shows the individual entries within each category.

Reference data list actions

Item	Description
Quick actions Quick actions	The button opens a menu from which you may choose additional actions related to reference data.
View category	This hover action opens the reference data category so you may view the category's information.
Show/Hide	This button opens a menu from which you may choose to show all roles or hide all items in that column.
Expand Expand	This button allows you to expand one set of items at a time to show all of the associated entries.
Collapse Collapse	This button allows you to collapse one set of items at a time.

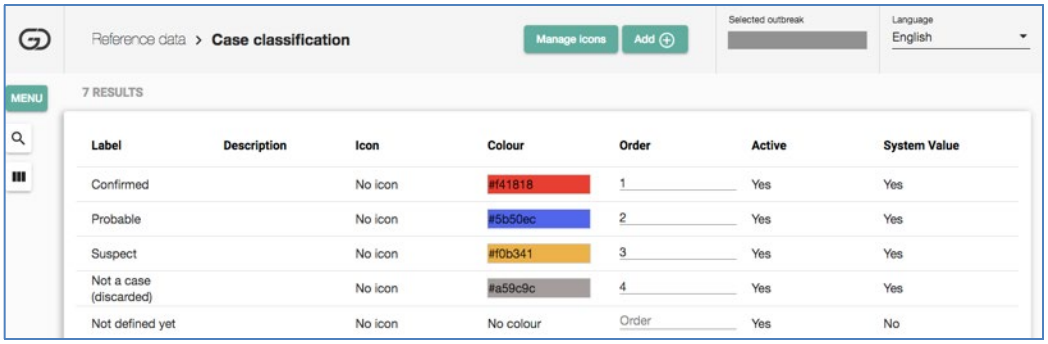
To view all reference data

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.

Reference data category list

The Reference data category list provides one location to view all entries for a single reference data category for one instance of Go.Data. In addition, you can complete actions related to a reference data category, such as add or edit entries, manage icons and colours, and delete custom category entries.



You can also change the display order from this list.

This list uses standard functionality as defined in Working with lists.

Reference data category list field definitions

Item	Description
Label	The name of the reference data category.
Description	The overview of the reference data category.
Icon	The picture, if any, associated with the reference data category.
Colour	The colour, if any, associated with the reference data category. Colour can be specified in Hex, RGB, HSL, or from a spectrum.
Order	The position of the reference data category within the entry.
Active	Displays **Yes** if the reference data category is available for users to use. Displays **No** if the reference data category is hidden from users.
System value	Displays **Yes** if the reference data category is a system value and cannot be changed by users. Displays **No** if the reference data category is a user-generated value and may be changed by users.
Created by	The name of the user who added the reference data category record to Go.Data.
Created at	The time (UTC) that the Created by user added the reference data category record to Go.Data.
Updated by	The name of the user who last modified the reference data category record.
Updated at	The time (UTC) the Updated by user saved the reference data category record after modifying the data.

Reference data category list actions

Item	Description
Manage icons Manage icons	This button opens a list from which you may complete additional actions related to reference data icons.
Add + Add ⊕	This button allows you to add a new entry to Go.Data for the reference data category.
Options (Ellipsis menu) ⋮	This hover action opens a menu from which you may choose additional actions related to the reference data category selected. This option is displayed for user-generated entries only.
Modify item	This hover action opens the reference data category selected so you may update the entry.
View item	This hover action opens the reference data category so you may view the entry's information.

To view all entries for a single reference data category

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Hover over a category and click the **View category** icon.

   Go.Data displays Reference data category list.

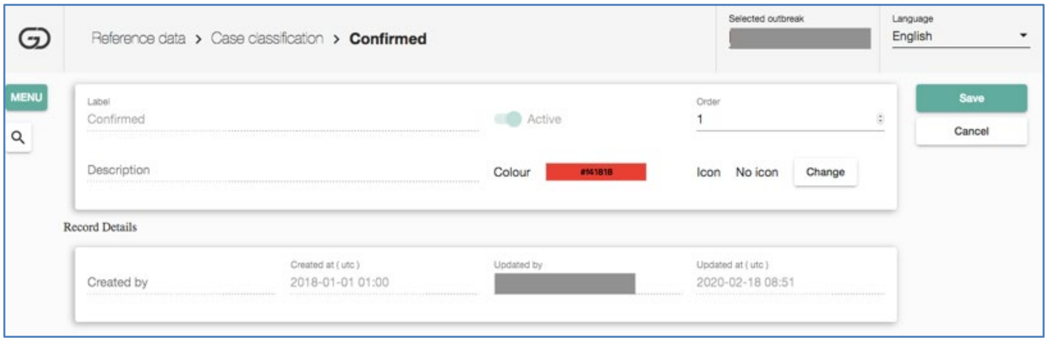
Reference data entry details

Reference data entry details provides one location to view individual reference data entry information recorded in Go.Data. In addition, you can complete actions related to a reference data entry record, such as edit the reference data entry, make the entry active or inactive, change the colour or icon, or change the order.

The information recorded on the Reference data entry details tab is used throughout Go.Data.

Details tab

The Details tab includes fields for defining a reference data entry's identifying and display information.



To view an individual reference data entry

1. Select **Menu > Reference data**.

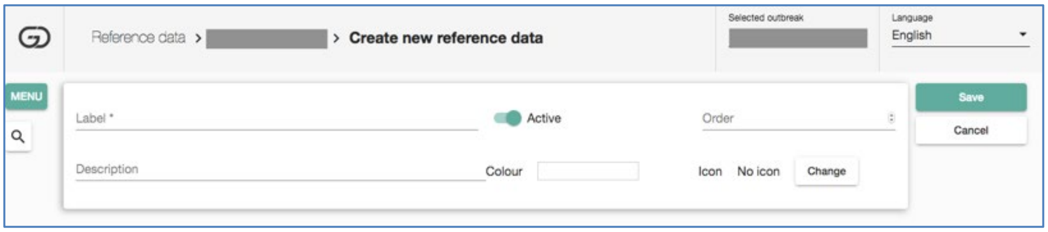
   Go.Data displays the Reference data list.
2. Hover over a category and click the **View category** icon.

   Go.Data displays Reference data category list.
3. Hover over an entry and click the **View item** icon.

   Go.Data displays Reference data entry details.

Adding or modifying custom reference data

A Reference data manager can add or modify custom reference data entries to system reference data categories at any time in Go.Data. Any changes you make to reference data will change the way the system uses and displays information.



You must complete or update the fields on the Reference data entry details tab when adding new reference data or modifying existing reference data.

To add a custom reference data entry

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Hover over a category and click the **View category** icon.

   Go.Data displays Reference data category list.
3. To add a new entry for the reference data category, click the **Add+** button.

   Go.Data displays Reference data entry details.
4. Complete the Details tab.

   - **Label**: Enter the name of the reference data entry. Required.
   - **Active**: Select this toggle to make the reference data entry available for use by other users.
   - **Order**: Enter the position of the reference data entry within the entry.
   - **Description**: Enter an overview of the reference data entry.
   - **Colour**: Click the colour box to choose a colour associated with the reference data entry. Colour can be specified in Hex, RGB, HSL, or from a spectrum.
   - **Icon**: Click the **Change** button to choose the picture, if any, associated with the reference data entry. Choose **None** for no icon or one of the other icons from the drop-down list.
5. Click the **Save** button.

   Go.Data displays a Reference data entry completed message.

To modify a custom reference data entry

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Hover over a category and click the **View category** icon.

   Go.Data displays Reference data category list.
3. Hover over a reference data entry and click the **Modify item** icon.

   Go.Data displays Reference data entry details.

4. Update the Details tab.
    - **Label**: Enter the name of the reference data entry. Required.
    - **Active**: Select this toggle to make the reference data entry available for use by other users.
    - **Order**: Enter the position of the reference data entry within the entry.
    - **Description**: Enter an overview of the reference data entry.
    - **Colour**: Click the colour box to choose a colour associated with the reference data entry. Colour can be specified in Hex, RGB, HSL, or from a spectrum.
    - **Icon**: Click the **Change** button to choose the picture, if any, associated with the reference data entry. Choose **None** for no icon or one of the other icons from the drop-down list.
5. Click the **Save** button.

    Go.Data displays a Reference data entry modified message.

Deleting custom reference data

Subject to your user permissions, you will be able to delete custom reference data entries. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

WARNING	When you delete a custom reference data entry from Go.Data, you will no longer be able to use that entry.

To delete a custom reference data entry

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Hover over a category and click the **View category** icon.

   Go.Data displays Reference data category list.
3. Hover over a reference data entry and click the **Options** icon.

   Go.Data displays Reference data entry details.
4. Click **Delete item**.

   Go.Data displays the Are you sure you want to delete this entry? message.
5. Click **YES**.

   Go.Data deletes the entry and displays the Entry deleted message.

Managing reference data icons

Go.Data provides functionality for you to customize the icons used by your instance of the application. These icons are displayed throughout Go.Data and provide an easy way for users to comprehend information at a glance.

First, a Reference data manager must add the icon to the Manage icons list, which makes it available to be assigned to reference data entries.

Adding an icon to this list makes the icon available for assignment to reference data entries throughout the instance of Go.Data.

When choosing an image for the icon, consider ease of visualisation on screens. Also square icons are preferred for consistency of display.

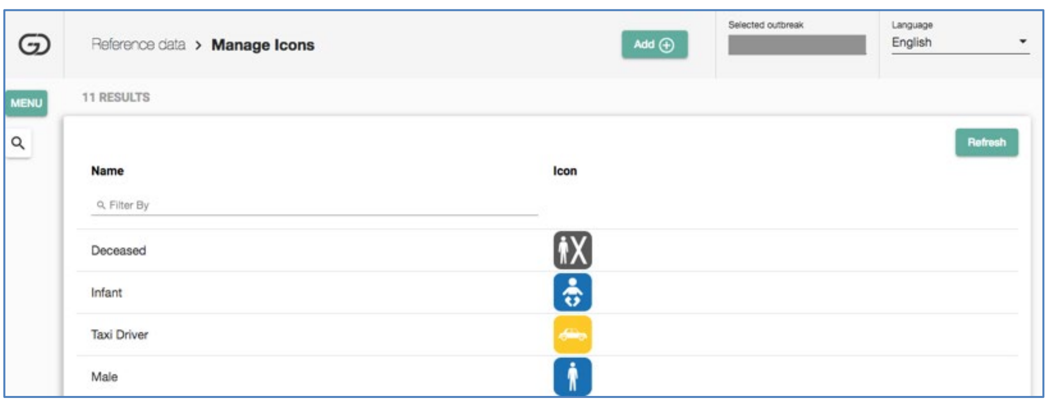
You can import icons in the following formats:

- .png
- .jpg
- .jpeg
- .bmp.

Deleting an icon removes the icon from availability. You cannot delete an icon that is in use.

Manage icons list

Viewing all reference data icons at one time allows you to easily view the icons available within your instance of Go.Data. The Manage icons list provides a single location to view, add, and delete all icons within Go.Data.



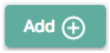
By default, the Manage icons list shows all icons available within your instance of Go.Data.

This list uses standard functionality as defined in Working with lists.

Manage icons list field definitions

Item	Description
Name	The name of the icon that will be displayed in Go.Data.
Icon	The picture image.

Manage icons list actions

Item	Description
Add + 	This button allows you to add a new icon to Go.Data category.

To view all icons

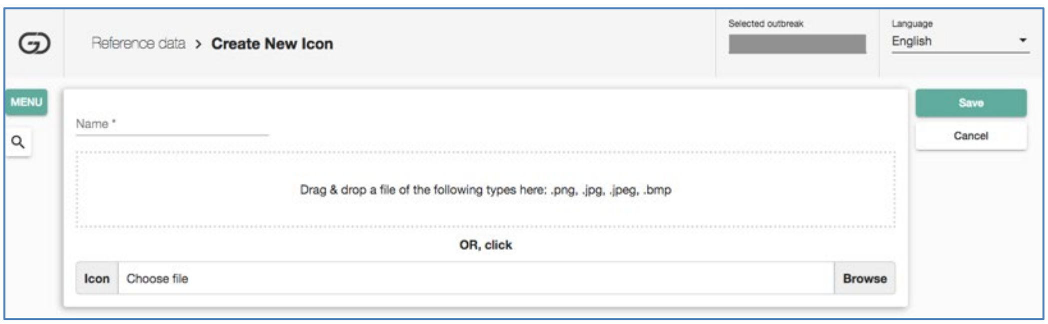
1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Click the **Quick Actions** button.
3. Select **Manage icons**.

   Go.Data displays the Manage icons list.

Adding custom icons

A Reference data manager can add custom icons at any time in Go.Data.



You can import icons in the following formats:

- .png
- .jpg
- .jpeg
- .bmp.

To add a custom icon

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Click the **Quick Actions** button.
3. Select **Manage icons**.

   Go.Data displays the Manage icons list.
4. To add a new icon, click the **Add+** button.

   Go.Data displays the Create new icon screen.
5. Complete the following.

   - **Name**: Enter the name of the icon. Required.

6. Do one of the following to add the import file to Go.Data:
   - Select a file on your local workstation, then drag and drop the file into the **Drag & drop a file of the following types here** field.
   - Click the **Browse** button to locate the file on your local workstation. Select the file, then click the **Open** button.
7. Click the **Save** button.

   Go.Data adds the icon and displays Manage icons list.

Deleting custom icons

Subject to your user permissions, you will be able to delete custom icons. All deletes in Go.Data are soft-deletes, thus it is possible to restore records if it becomes necessary.

You cannot delete an icon that is in use, so you must first remove the icon from any reference data entries that are using it currently. When the icon is no longer in use, you may delete the icon.

NOTE	When you delete a custom icon from Go.Data, you will no longer be able to use the icon on any reference data entry.

To delete a custom icon

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Click the **Quick Actions** button.
3. Select **Manage icons**.

   Go.Data displays the Manage icons list.
4. Hover over an icon and click the **Options** icon.
5. Click **Delete item**.

   Go.Data displays the Are you sure you want to delete this icon? message.
6. Click **YES**.

   Go.Data deletes the icon and displays the Icon deleted message.

NOTE	If an icon is currently in use by a reference data entry, you will not be able to delete the icon until you remove it from all reference data entries.

Importing and exporting reference data

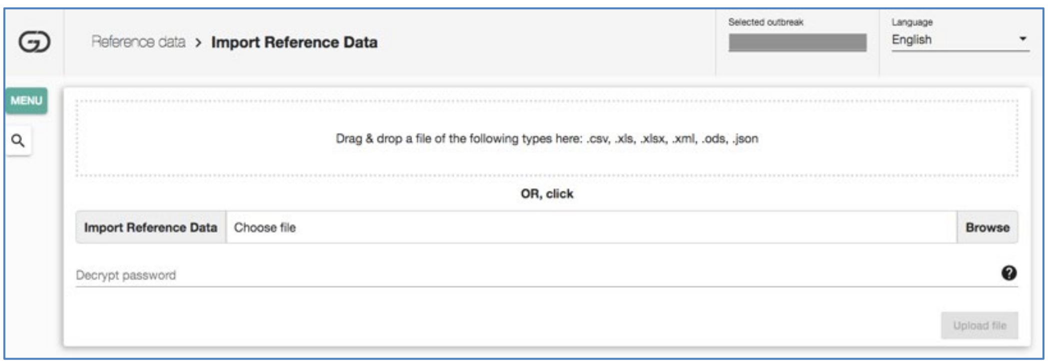
Creating and managing reference data can be time-consuming. Go.Data allows you to import and export the reference data in a variety of file formats for use in other instances of the application.

Importing all reference data

You may wish to import reference data from another copy of Go.Data. You can import these records to Go.Data instead of manually entering the results.

You can import records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .ods
- .json.



To import all reference data

1. Select **Menu > Reference data**.

   Go.Data displays the Reference data list.
2. Click the **Quick Actions** button.
3. Select **Import reference data**.

   Go.Data displays the Import reference data screen.
4. Do one of the following to add the import file to Go.Data:

   - Select a file on your local workstation, then drag and drop the file into the **Drag & drop a file of the following types here** field.
   - Click the **Browse** button to locate the file on your local workstation. Select the file, then click the **Open** button.
5. If the file you are importing has been encrypted, enter the password in the **Decrypt password** field.
6. Click the **Upload file** button.

   Go.Data displays the Import reference data screen.

7. Complete mapping to import the data:
    - Verify the **Source file** information.
    - In the **Model information** column, select the Go.Data destination field from the drop-down menu that best matches the **Source file information** field in the left column. If required, click the **Add field option** button to create additional options or the **Add field** button to create additional rows. You can also delete fields if necessary.
8. Click the **Save import mapping** button to save the **Source file information** and **Model information fields** for future imports.
9. Click the **Import file** button.

    Go.Data imports the data.

Exporting reference data

You can export data in a list for reference data.

Go.Data allows you to export records in the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .json
- .ods
- .pdf.

To export reference data

1. Select **Menu > Reference data**.

    Go.Data displays the Reference data list.
2. Click the **Quick Actions** button.
3. Select **Export reference data**.
4. Complete the **Export case data** screen fields.
    - **As type:** Enter the file format type in which to export the report. Required.
5. Click **Export**.

    Go.Data exports the data in the selected file type.

Chapter 20 – Managing location data

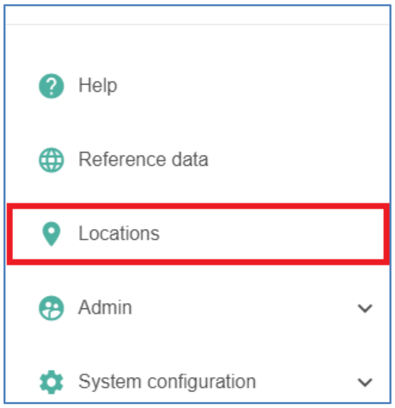
Location data is critical for tracking an outbreak geographically. Additionally, reliable location data is important for locating cases, events, and following up with contacts. For this reason, Go.Data maintains specific location reference data.

Go.Data uses location data to create hierarchical location trees. These tree maps allow you to create a relationship between a parent location and several child locations. For example, Country > State > City > Village.

A user with Reference data manager privileges has the ability to add and modify the location data within a specific instance of Go.Data. Additionally, depending on your user permissions, Go.Data allows you to export location data.

Chapter Contents

Introduction to location data



Effective contact follow-up relies on having a consistent manner for describing geographical locations. Go.Data includes location management as a special type of reference data in which a hierarchical location tree of place names and synonyms of place names can be managed along with latitude and longitude that locates the specific location.

A user with Reference data manager privileges can maintain the hierarchical location tree, see where a location is used, and export the tree for others to import.

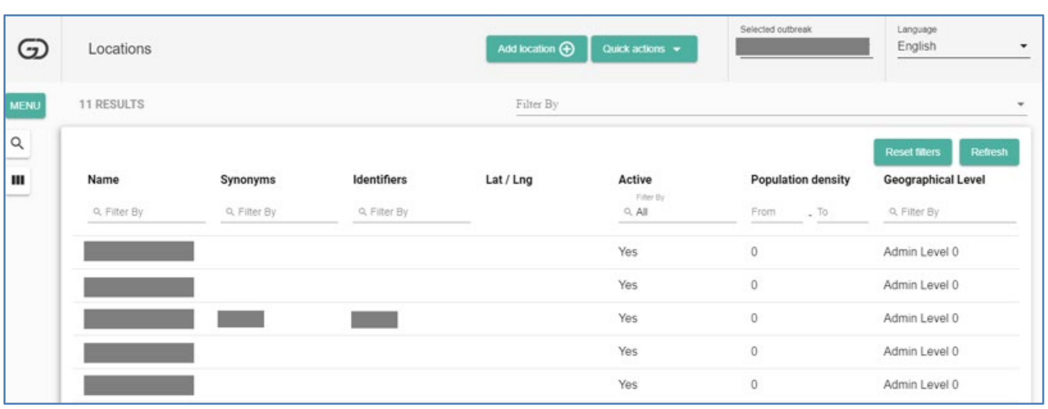
Location data is a critical for Go.Data's mapping functionality.

Actions related to viewing, adding, and modifying locations start from either the Locations list or Children locations list.

- **Locations list**: a single location to view all location records for an instance of Go.Data.
- **Location details**: a single location to view individual location information.
- **Children locations list**: a single location to view all sublocation records.
- **Location usage list**: a single location to view the records and outbreaks associated with a particular location within your instance of Go.Data.

Locations list

Viewing all locations at one time allows you to view the location reference data stored within your instance of Go.Data. The Locations list provides a single location to view all parent location records, modify location records, view sublocations, and view records related to a specific location.



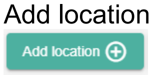
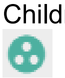
By default, the Locations list shows all parent locations available within your instance of Go.Data. The location records include identifying information about a parent location, including the latitude and longitude information used for geographic mapping and any synonyms or identification codes.

This list uses standard functionality as defined in Working with lists.

Locations list field definitions

Item	Description
Name	The given name of a geographic location.
Synonyms	Any additional given names of a geographic location.
Identifiers	Abbreviations and codes used to identify a geographic location.
Lat/Lng	The latitude and longitude of a geographic location.
Active	Displays **Yes** if the location is available for users to add outbreak data. Displays **No** if the location is hidden from users.
Population density	The number of people present in a unit area.
Geographical Level	The position of the location in the hierarchical tree. The parent location is Admin level 0.
Created by	The name of the user who added the location record to Go.Data
Created at	The time (UTC) that the Created by user added the location record to Go.Data.
Updated by	The name of the user who last modified the location record data.
Updated at	The time (UTC) the Updated by user saved the location record after modifying the data.

Locations list actions

Item	Description
Add location + 	This button allows you to add a new location to Go.Data.
Quick actions 	The button opens a menu from which you may choose additional actions related to locations.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to a location selected.
Children locations 	This hover action opens the location selected so you may view the children location in the hierarchical tree.

Item	Description
Modify location	This hover action opens the location selected so you may update the location’s information.
View location	This hover action opens the location so you may view the location’s information.

To view all locations

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.

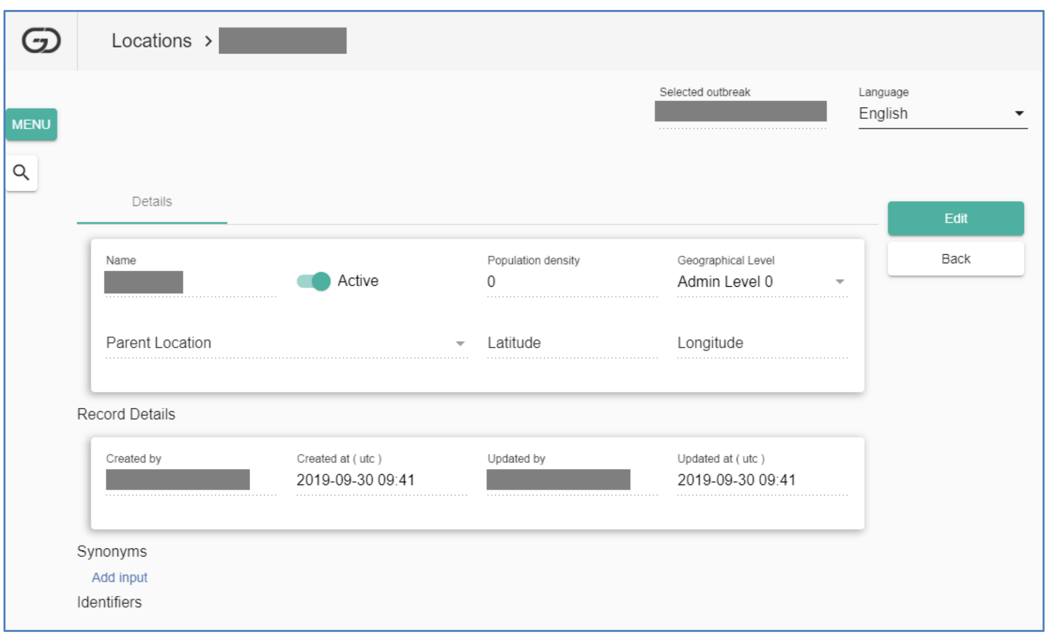
Location details

Location details provides one location to view the recorded details for a geographic location recorded in Go.Data. In addition, you can complete actions related to a geographic location, such as edit the location data, make a location active or inactive, assign a parent location, or add synonyms.

The information recorded on the Location details tab is used throughout Go.Data for geographical mapping purposes.

Details tab

The Details tab includes fields for a location’s identifying and geographical mapping information.



To view a location

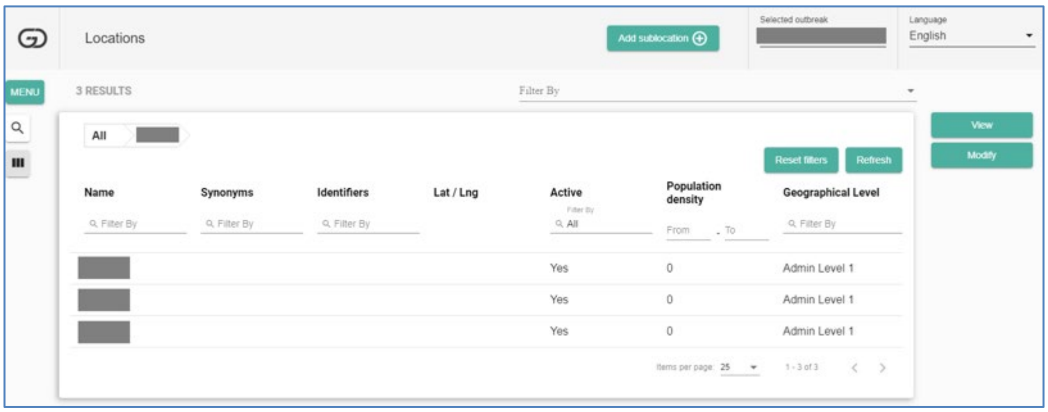
1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Hover over a location and click the **View location** icon.

   Go.Data displays Location details.

Children locations list

For geographical mapping purposes, Go.Data depends on a hierarchical location tree of parent and sublocations. A user with Reference data manager credentials can maintain this tree of parent and sublocations.



Reference data managers use the **Geographical level** field to define where a location sits in the hierarchical tree. Locations with Admin level 0 are the parent location, with Admin level 1 as a child of Admin level 0, Admin level 2 as a child of Admin level 1, and so on.

You can view the child locations for a parent location using the Children locations list. This list provides breadcrumbs, which display the relationship between parent and child locations as you navigate through the hierarchical tree.

From the Children locations list, you can also add new sublocations. For example, you may wish to add a specific neighborhood as a location within a city.

By default, the Children locations list displays all child location records for the parent location.

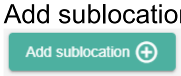
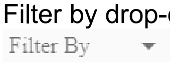
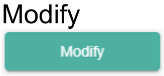
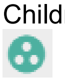
This list uses standard functionality as defined in Working with lists.

Children locations list field definitions

Item	Description
Name	The given name of a geographic location.
Synonyms	Any additional given names of a geographic location.
Identifiers	Abbreviations used to identify a geographic location.
Lat/Lng	The latitude and longitude of a geographic location.

Item	Description
Active	Displays **Yes** if the location is available for users to add outbreak data. Displays **No** if the location is hidden from users.
Population density	The number of people present in a unit area, for example per km^2.
Geographical Level	The position of the location in the hierarchical tree. The parent location is Admin level 0.
Created by	The name of the user who added the location record to Go.Data.
Created at	The time (UTC) that the Created by user added the location record to Go.Data.
Updated by	The name of the user who last modified the location record data.
Updated at	The time (UTC) the Updated by user saved the location record after modifying the data.

Children locations list actions

Item	Description
Add sublocation + 	This button allows you to add a new sublocation to Go.Data.
Quick actions 	The button opens a menu from which you may choose additional actions related to locations.
Filter by drop-down 	This drop-down menu allows you select the location information displayed by the Locations list.
Locations breadcrumbs 	The locations breadcrumbs list displays the hierarchical tree of parent and children locations. You can click a location in the locations breadcrumbs list to view a Children locations list for that location.
View 	This button allows you to view the location details for the parent location of the Children locations list displayed.
Modify 	This button allows you to modify the location details for the parent location of the Children locations list displayed.
Options (Ellipsis menu) 	This hover action opens a menu to choose additional actions related to a location selected.
Children locations 	This hover action opens the location selected so you may view the location's sublocations.

Item	Description
Modify location	This hover action opens the location selected so you may update the location’s information.
View location	This hover action opens the location so you may view the location’s information.

To view children locations

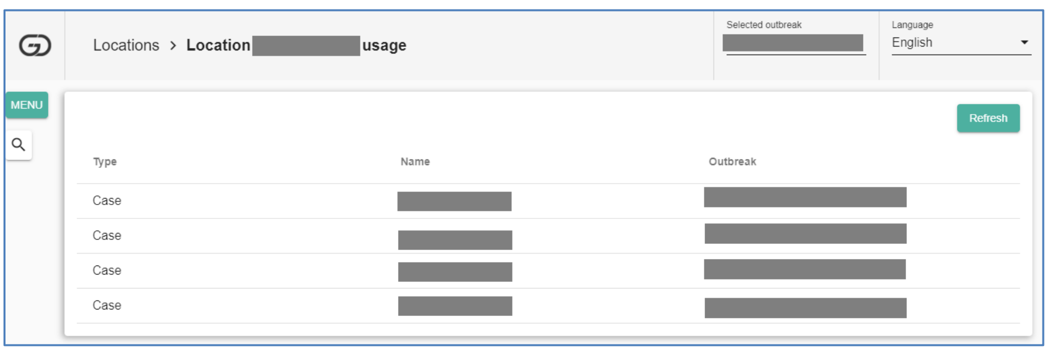
1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Hover over a location and click the **Children locations** icon.

   Go.Data displays Children locations list.

Location usage list

As a Go.Data user, you may wish to review the locations. The Locations feature provides functionality for viewing where a location’s data has been used in the application.



The Location usage list provides a single location to view all Go.Data records associated with a specific location. From the Location usage list, you can also view and modify records.

By default, the Location usage list shows all related records for the location.

This list uses standard functionality as defined in Working with lists.

Location usage list field definitions

Item	Description
Type	The type of record using the selected location.
Name	The name of the record using the selected location.
Outbreak	The outbreak containing the record using the selected location.

Children locations list actions

Item	Description
Modify	This hover action opens the record so you may update the record's information.
View	This hover action opens the record details so you may view the record's information.

To view location usage

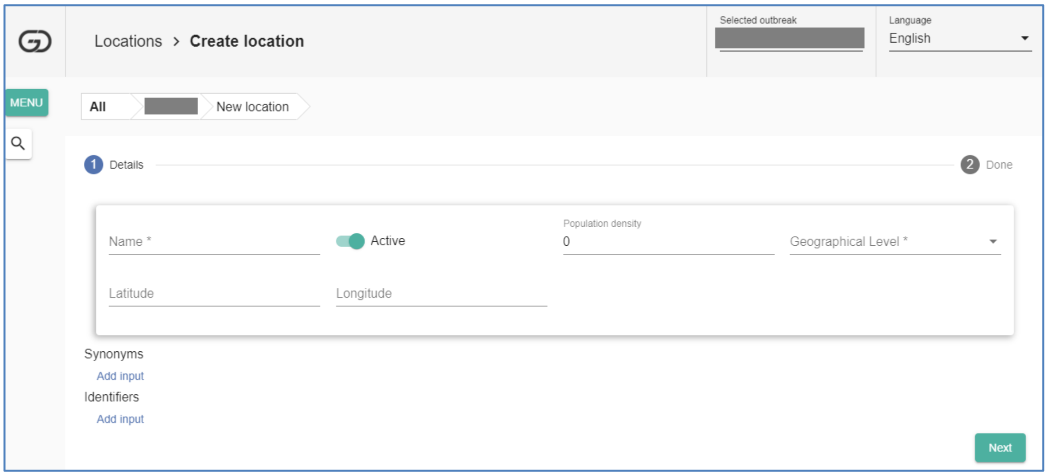
1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Hover over a location and click the **Options** icon.
3. Select **Location Usage**.

   Go.Data displays the Location usage list.

Adding or modifying locations

A Reference data manager can add or modify locations at any time in Go.Data. All location data is critical for the mapping functionality in Go.Data. Any changes you make to location data will change the way the system maps an outbreak geographically.



You can add a parent location. You can also add a child location to an existing parent location to create a hierarchical tree.

You must complete or update the fields on the Location details tab when adding new locations or modifying existing locations.

For more information on the fields, see Location details.

To add or modify a location

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. To add a new parent location, click the **Add location+** button. To add a sublocation to an existing parent location, hover over a location and select the **Children locations** icon. Navigate through the hierarchical location tree until you have reached the location to which you would like to add a sublocation and click the **Add sublocation+** button.

   Go.Data displays Location details.
3. Complete the Details tab.

   - **Name:** Enter the geographical name of the location. Required.
   - **Active:** Select this toggle to make the location available to all users in your instance of Go.Data.
   - **Population density:** Enter the population density of the location.
   - **Geographical level:** Enter the location's position in the hierarchical location tree. Required.
   - **Latitude:** Enter the exact latitude of the location.
   - **Longitude:** Enter the exact longitude of the location.
   - **Synonyms:** Click **Add input** and enter additional given names for the location.
   - **Identifiers:** Click **Add input** and enter abbreviations used to identify the location.
4. Click the **Next** button.

   Go.Data displays a data entry completed message.

5. Click the **Create location** button.

   Go.Data displays the Location details.

Deleting locations

Subject to your user permissions, you will be able to delete locations.

WARNING	When you delete a location from Go.Data, you will no longer be able to map data geographically for the location.

To delete a location

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Navigate to the location you wish to delete and click the **Options** icon.
3. Click **Delete location**.

   Go.Data displays the Are you sure you want to delete this location? message.
4. Click **YES**.

   Go.Data deletes the location and displays the Location deleted message.

Importing and exporting hierarchical location trees and location data

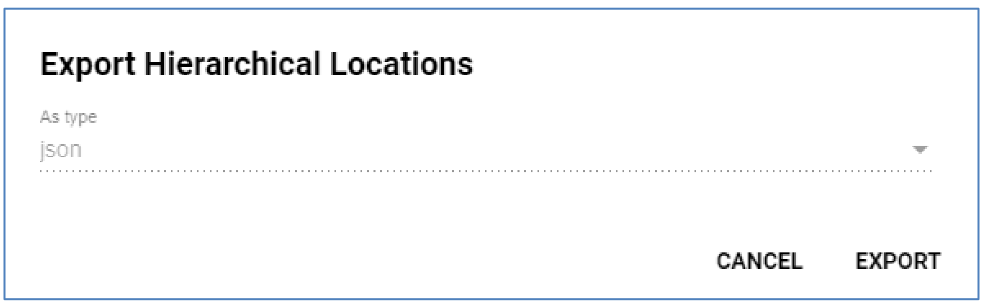
Creating and managing hierarchical location trees can be time-consuming. Go.Data allows you to import and export the hierarchical location tree for use in other instances of the application. Additionally, you can import location data.

Go.Data imports and exports all hierarchical location tree data as a .json file. Typically, this file is created in another instance of Go.Data and is compatible with the Go.Data structure.

When importing data from Microsoft Excel or datasets in flat structures, make sure that the file contains the field to indicate parent location name; this information is used to generate hierarchical location structure.

You can import location data in any of the following formats:

- .csv
- .xls
- .xlsx
- .xml
- .ods
- .json.



To import hierarchical locations

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Click the **Quick Actio**ns button.
3. Select **Import hierarchical locations**.

   Go.Data displays the Import hierarchical locations screen.
4. Click the **Browse** button and select the hierarchical location tree file from your local machine.
5. Click the **Open** button.
6. If required, enter a password in the **Decrypt password** field.
7. Click the **Upload file** button.

   Go.Data displays the Locations list and a data imported message.

To export a hierarchical locations

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.

2. Click the **Quick Actions** button.
3. Select **Export hierarchical locations**.

   Go.Data displays the Export hierarchical locations screen.
4. Click **Export**.

   Go.Data exports the data.

To import location data

1. Select **Menu > Locations**.

   Go.Data displays the Locations list.
2. Click the **Quick Actions** button.
3. Select **Import location data**.

   Go.Data displays the Import location data screen.
4. Click the **Browse** button and select the hierarchical location tree file from your local machine.
5. Click the **Open** button.
6. If required, enter a password in the **Decrypt password** field.
7. Click the **Upload file** button.

   Go.Data displays the Locations list and a data imported message.

Chapter 21 – Managing languages

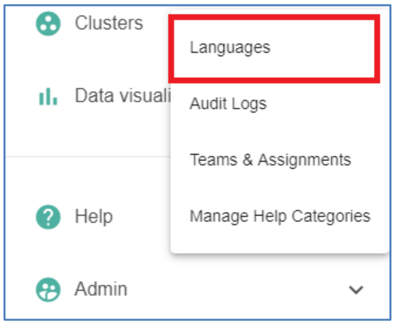
Go.Data is used in outbreaks around the world and must support people who speak a wide variety of languages. For this reason, Go.Data supports custom multilingual functionality.

A user with Language manager privileges has the ability to add and modify the languages available for other users within a specific instance of Go.Data. By default, Go.Data currently contains multilingual functionality for languages, such as English, French, Portuguese, and Spanish. Default languages may change in the future.

Additionally, depending on your user permissions, Go.Data allows you to import and export language files for use in other instances of Go.Data.

Chapter Contents

Introduction to languages



Go.Data contains functionality to support any language based on custom word-for-word translation.

Using a spreadsheet, Go.Data Language managers can enter a word-for-word translation for text used within the application. After a Language manager has completed the translation via spreadsheet, they can import the .xlsx file into Go.Data. Subsequently, other Go.Data users can select this language from the language selection drop-down menu and view Go.Data in the new language.

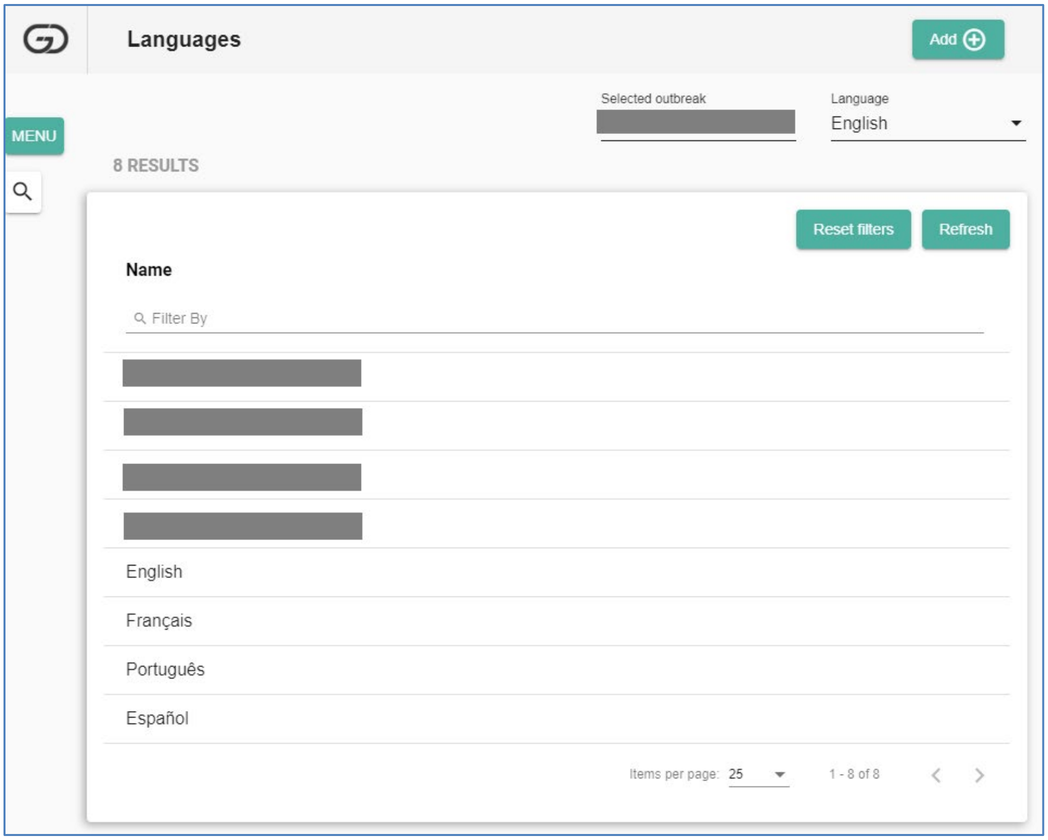
Actions related to viewing, adding, and modifying languages start from either the Languages list or the Language file.

- **Languages list:** a single location to view all languages available in an instance of Go.Data.
- **Language file:** a single location to view all Go.Data text and translated terminology.

Languages list

Viewing all languages at one time allows you to review the complete multilingual functionality available in your instance of Go.Data.

The languages list provides a single location to view all languages available to users in your instance of Go.Data, add or modify languages, import and export language files, and delete languages.



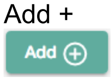
By default, Go.Data displays all text in English. Users with Language manager privileges can add a new language, modify an existing language, or delete a language. Users of any level select a language for viewing their individual instance of Go.Data.

This list uses standard functionality as defined in Working with lists.

Languages list field definitions

Item	Description
Name	The name of the language.

Languages list actions

Item	Description
Add + 	This button allows you to add a new language to Go.Data.
Options (Ellipsis menu) 	This hover action opens a menu from which you may choose additional actions related to the language selected.

Item	Description
Modify language	This hover action opens the language selected so you may update the name of the language.
View language	This hover action opens the language selected so you may view the name of the language.

To view all languages

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.

Language file

The Languages file provides one location for you to view the translations for all system text that appears within your instance of the Go.Data application. In addition, depending on your user privileges, you can add a new language via a Languages file or modify an existing language by editing its Language file.

All Language files are available in .xlsx format. Most actions related to adding and modifying the Language file exist outside of the Go.Data application.

Language token	Translation
LNG_ADDRESS_ADD_ANOTHER_ADDRESS_MESSAGE	Add another address
LNG_ADDRESS_ADD_NEW_ADDRESS_MESSAGE	Add address
LNG_ADDRESS_FIELD_LABEL_ADDRESS	Address
LNG_ADDRESS_FIELD_LABEL_ADDRESS_ADDRESS_LINE_1	Address line 1
LNG_ADDRESS_FIELD_LABEL_ADDRESS_ADDRESS_LINE_2	Address line 2
LNG_ADDRESS_FIELD_LABEL_ADDRESS_CITY	City
LNG_ADDRESS_FIELD_LABEL_ADDRESS_COUNTRY	Country
LNG_ADDRESS_FIELD_LABEL_ADDRESS_DATE	Address valid until date
LNG_ADDRESS_FIELD_LABEL_ADDRESS_GEO_LOCATION	Geolocation
LNG_ADDRESS_FIELD_LABEL_ADDRESS_GEO_LOCATION_ACCURATE	Accurate Geolocation
LNG_ADDRESS_FIELD_LABEL_ADDRESS_GEO_LOCATION_LAT	Lat
LNG_ADDRESS_FIELD_LABEL_ADDRESS_GEO_LOCATION_LNG	Lng

To view the Language file

1. Select **Menu > Admin > Languages**.

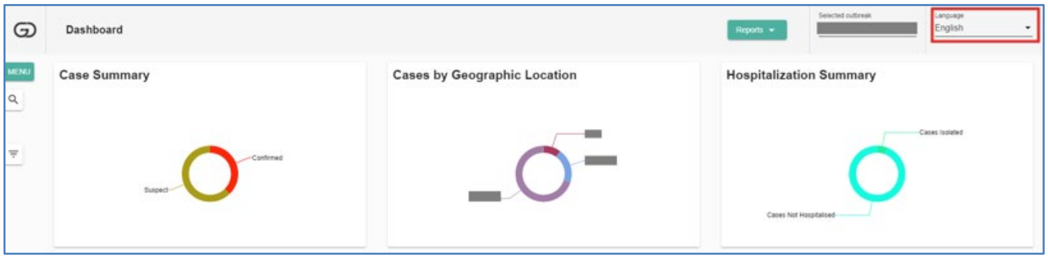
   Go.Data displays the Languages list.
2. Hover over a language and click the **Options** icon.
3. Select **Download language file**.

   Go.Data displays the Export language message.
4. Select a file type from the **As type** drop-down menu and click **Export**.

   Your local machine downloads the language file from Go.Data.

Selecting the system language

Go.Data's multilingual functionality allows any user to change the language displayed by their installation of Go.Data at any time.



The language drop-down menu is located in the top-right corner of every screen in the application. Available languages vary based on the individual languages defined in the Languages list.

For more information on adding and modifying languages in Go.Data, see Adding or modifying languages.

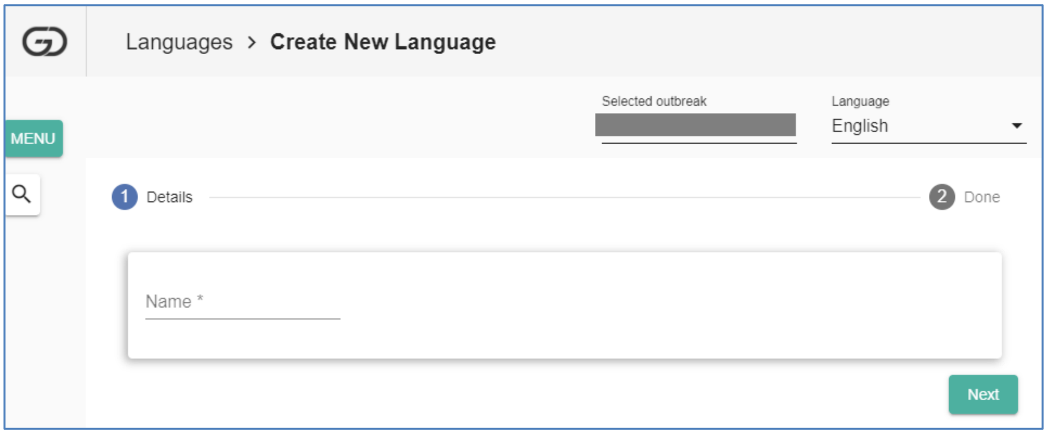
To select the system language

1. Click the **Language** drop-down menu and select a language.

   Go.Data updates the text on all screens to the selected language.

Adding or modifying languages

Depending on your user permissions, you can add or modify languages at any time. Typically, adding and modifying languages is restricted to Go.Data users with Language manager credentials.



Most of the tasks for adding or modifying languages take place outside of Go.Data. Languages are maintained using .xlsx files. Go.Data stores the name of the language and the related .xlsx file for reference.

When adding a new language, you must manually translate the new language word-for-word in the .xlsx file from a language that already exists within Go.Data.

For more information about the language fields stored by Go.Data, see Languages list field definitions.

To add a language

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
2. To add a new language, click the **Add+** button.

   Go.Data displays Create new language details.
3. Enter a name for the language in the **Name** field and click the **Next** button.

   Go.Data displays a data entry completed message.
4. Click the **Create language** button.

   Go.Data displays the Modify language screen.
5. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
6. Hover over an existing language you are familiar with and click the **Options** icon.
7. Select **Download language file**.
8. Select a file type from the **As type** drop-down menu and click **Export**.

   Go.Data downloads the language file.

9. Rename the downloaded language file to match the new language you added in steps 1-5. For example, if the language you created was named **Go.Data Test Language**, rename the file to **Go.Data Test Language.xlsx**.
10. Update the fields in the **Translation** column with the new language text and save the file.
11. Return to the Go.Data Languages list.
12. Hover over the new language and click the **Options** icon.
13. Select **Import language file**.

    Go.Data displays the Import language tokens screen.
14. Click the **Browse** button and select the language file from your local machine.
15. Click the **Open** button.
16. Click the **Import file** button.

    Go.Data displays the Languages list and a data imported message.

To modify a language

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
2. Hover over an existing language and click the **Options** icon.
3. Select **Download language file**.
4. Select a file type from the **As type** drop-down menu and click **Export**.

   Go.Data downloads the language file.
5. Update the fields in the **Translation** column and save the file.
6. Return to the Go.Data Languages list.
7. Hover over the new language and click the **Options** icon.
8. Select **Import language file**.

   Go.Data displays the Import language tokens screen.
9. Click the **Browse** button and select the language file from your local machine.
10. Click the **Open** button.
11. Click the **Import file** button.

    Go.Data displays the Languages list and a data imported message.

Deleting languages

Subject to your user permissions, you can delete a language. Because language files are maintained through .xlsx files, it is possible to restore languages by reimporting a language file.

NOTE	You cannot delete Go.Data's default language files, such as English, French, Portuguese, or Spanish.

To delete a language

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
2. Hover over an existing language and click the **Options** icon.
3. Click **Delete language**.

   Go.Data displays the Are you sure you want to delete this language? message.
4. Click **YES**.

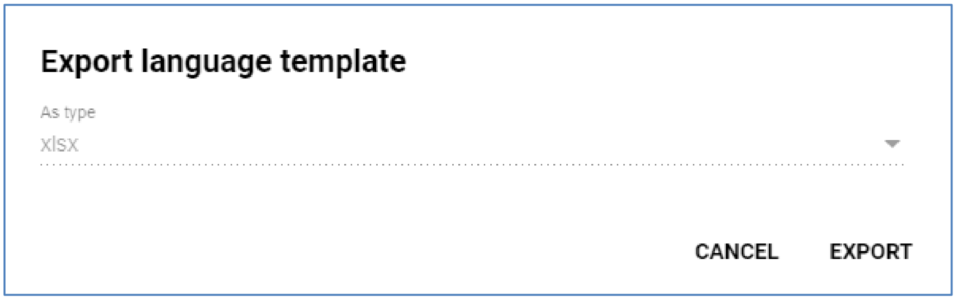
   Go.Data deletes the language and displays the Language deleted message.

Importing and exporting languages

Go.Data allows you to import and export language files for a specific instance of Go.Data.

This functionality allows you to quickly add a new language to the application for use in an area with new language requirements.

Go.Data allows you to import and export language files in .xlsx format.



To import a language

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
2. Hover over an existing language and click the **Options** icon.
3. Select **Import language file**.

   Go.Data displays the Import language tokens screen.
4. Click the **Browse** button and select the language file from your local machine.
5. Click the **Open** button.
6. Click the **Import file** button.

   Go.Data displays the Languages list and a data imported message.

To export a language

1. Select **Menu > Admin > Languages**.

   Go.Data displays the Languages list.
2. Hover over an existing language and click the **Options** icon.
3. Select **Download language file**.
4. Select a file type from the **As type** drop-down menu and click **Export**.

   Go.Data downloads the language file.

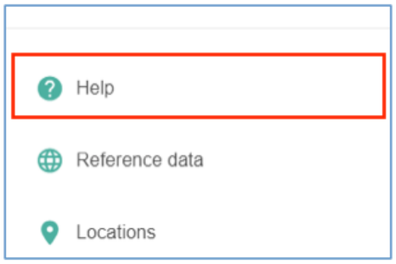
Chapter 22 – Configuring help

Go.Data contains in-application help items that allow users to search, browse, and access help screens from the individual features, lists, fields, and dashboards.

Help content managers can configure and approve help categories and help items to provide contextual help to users in their specific instance of Go.Data. Additionally, Go.Data can deliver help files in all languages supported by the application's multilanguage functionality.

Chapter Contents

Introduction to help



Go.Data contains functionality for Help content managers to create help categories and help items, which assist users in navigating, using, and understanding the application.

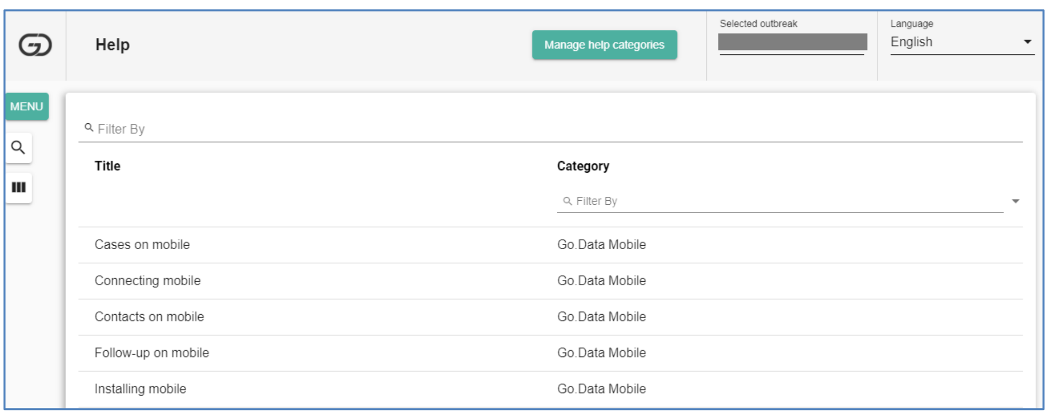
Help categories and help items are unique to your instance of Go.Data.

Go.Data uses the following views to organize help items:

- **Help list**: a single location to view all help items for a specific instance of Go.Data.
- **Help item details**: a single location to view individual help item information.
- **Help categories list**: a single location to view all help categories for a specific instance of Go.Data.
- **Help items list**: a single location to view all help items within a help category for a specific instance of Go.Data.

Help list

Viewing the Help list allows you as a Help content manager to review all help categories and items for your instance of Go.Data.



From the Help list, you can view and manage help categories and help items. The Help list includes filter functionality to allow users to find specific help items by text input or help category.

Additionally, the Help list contains functionality to sort categories alphabetically from A to Z or Z to A.

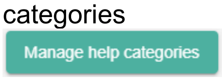
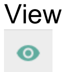
By default, the Help list shows all help items for your instance of Go.Data. Help items are sorted by the order specified in help category.

This list uses standard functionality as defined in Working with lists.

Help list field definitions

Item	Description
Title	The name of the help item.
Category	The help category that contains the help file.

Help list actions

Item	Description
Manage help categories 	This button allows you to view the Help categories list from which you can add new help categories and help files.
View items 	This hover action opens the help item selected so you may read the documented help.
Sort items 	This list action allows you to sort the help items alphabetically by help category name.

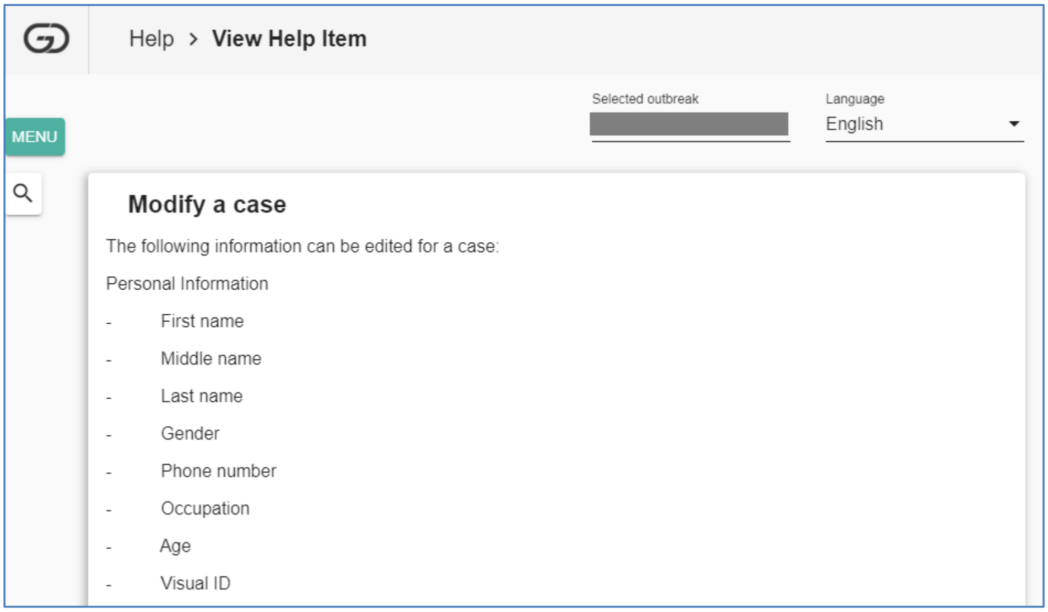
To view the Help list

1. Select **Menu > Help**.

   Go.Data displays the Help list.

Help item details

Help item details provides one location to view all user assistance information that has been documented by a Go.Data Help content manager. Help item details is a text input field that contains specific information or instructions about a topic.



To view a help item

1. Select **Menu > Help**.

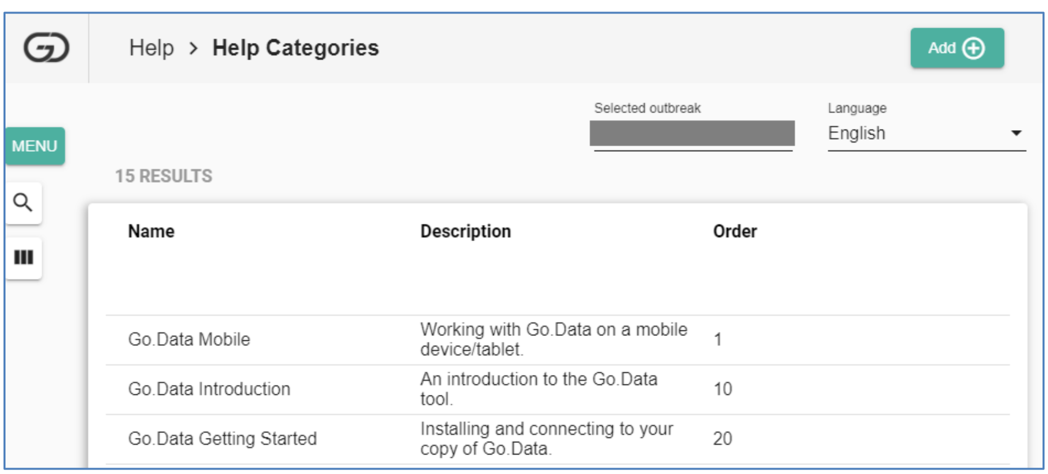
   Go.Data displays the Help list.
2. Hover over a help item and click the **View item** icon.

   Go.Data displays the Help item details.

Help categories list

The Go.Data Help content manager arranges help items into help categories. These help categories create groupings of related help items, which allow Go.Data users to easily locate in-application documentation and related help items.

The Help categories list provides one location to view all help categories for a specific instance of Go.Data.



By default, the Help categories list shows all help categories for your instance of Go.Data. Help categories are sorted by the order specified in Help category details.

Help categories list field definitions

Item	Description
Name	The name of the help category.
Description	The description of the help items within the help category.
Order	The order in which Go.Data displays the help category in the Help categories list.

Help categories list actions

Item	Description
Add +	This button allows you to view the Help categories list from which you can add new help categories and help files.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a selected help category.
See help items	This hover action opens the Help items list.
Modify category	This hover action opens the help category selected so you may update the help category's information.
View category	This hover action opens the help category selected so you may view the help category information.

To view all help categories

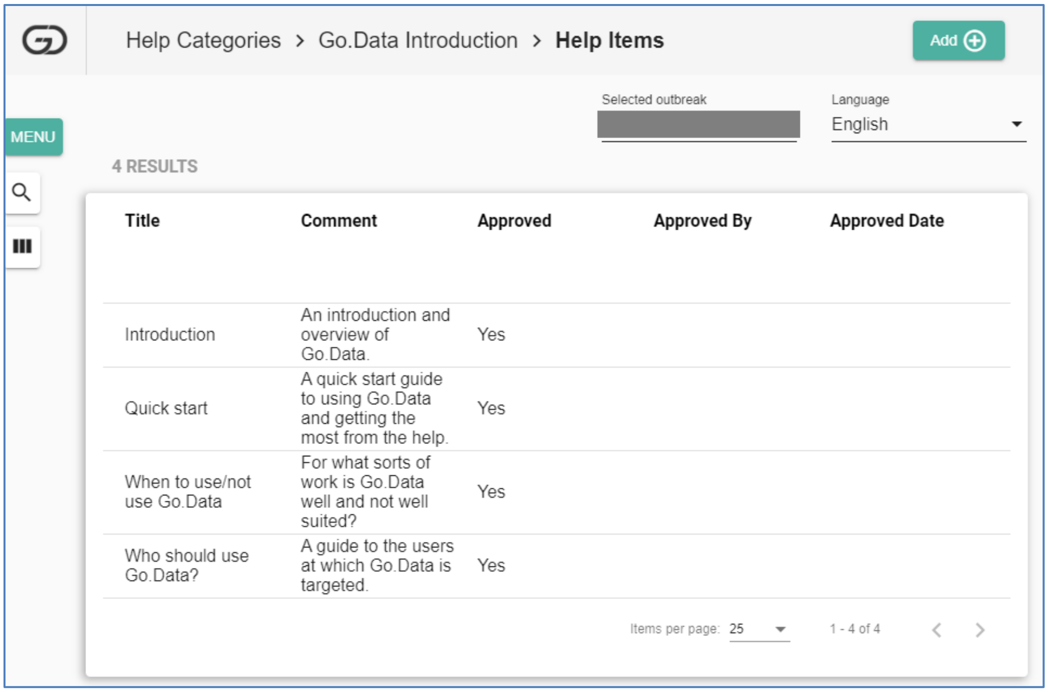
1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.

Help items list

The Help items list provides one location to view all help items assigned to a specific help category. Additionally, you can add new help items to a help category from the Help items list.



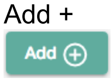
By default, the Help items list displays all help items for the selected help category. Help items are sorted by the order specified in the help item.

This list uses standard functionality as defined in Working with lists.

Help items list field definitions

Item	Description
Title	The name of the help item.
Comment	The description of the help item.
Approved	Displays **Yes** if someone has approved the help item. Displays **No** if someone has not approved the help item.
Approved By	Displays the name of the person who approved the help item.
Approved Date	Displays the date the Approved by person approved the help item.

Help items list actions

Item	Description
Add + 	This button allows you to add a new help item to the help category.
Options (Ellipsis menu)	This hover action opens a menu from which you may choose additional actions related to a selected help item.

Item	Description
Approve	This hover action approves a new help item and adds it to the help category.
Modify item	This hover action opens the help item selected so you may update the help item's information.
View category	This hover action opens the help item selected so you may view the help item information.

To view all help items

1. Select **Menu > Help**.

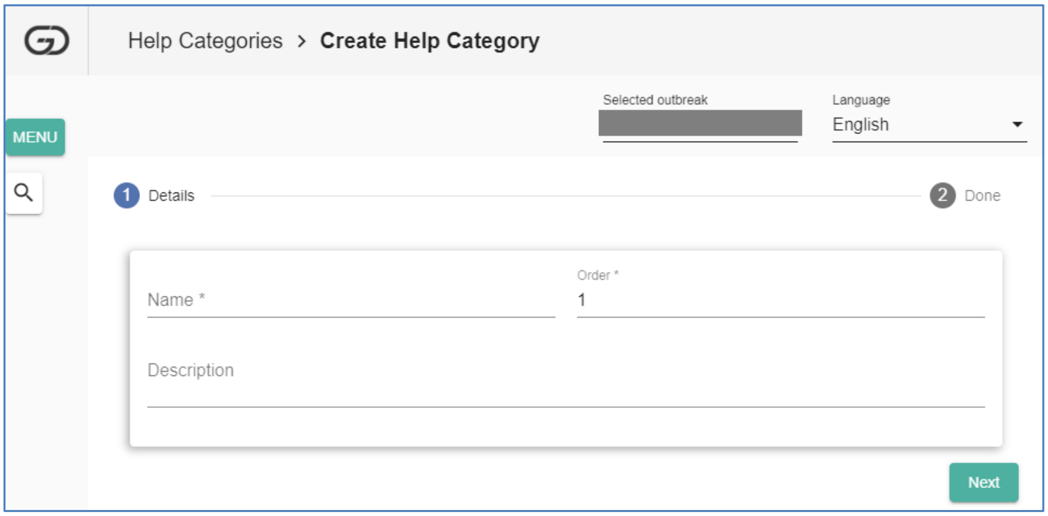
   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. Hover over the help category and click the **See help items** icon.

   Go.Data displays the Help items list.

Adding and modifying help categories

To begin the process of creating new help items in Go.Data, you need to first create a help category to organize the help items.



You can add help categories at any time. The Help categories details tab contains fields that you must complete for new help categories or that you can modify for existing help categories.

For more information on the help category fields, see Help categories list.

To add or modify a help category

1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. To add a new help category, click the **Add+** button. To modify a help category that already exists, hover over a help category and click the **Modify category** icon.

   Go.Data displays the Help category details.
4. Complete the Help category details tab.

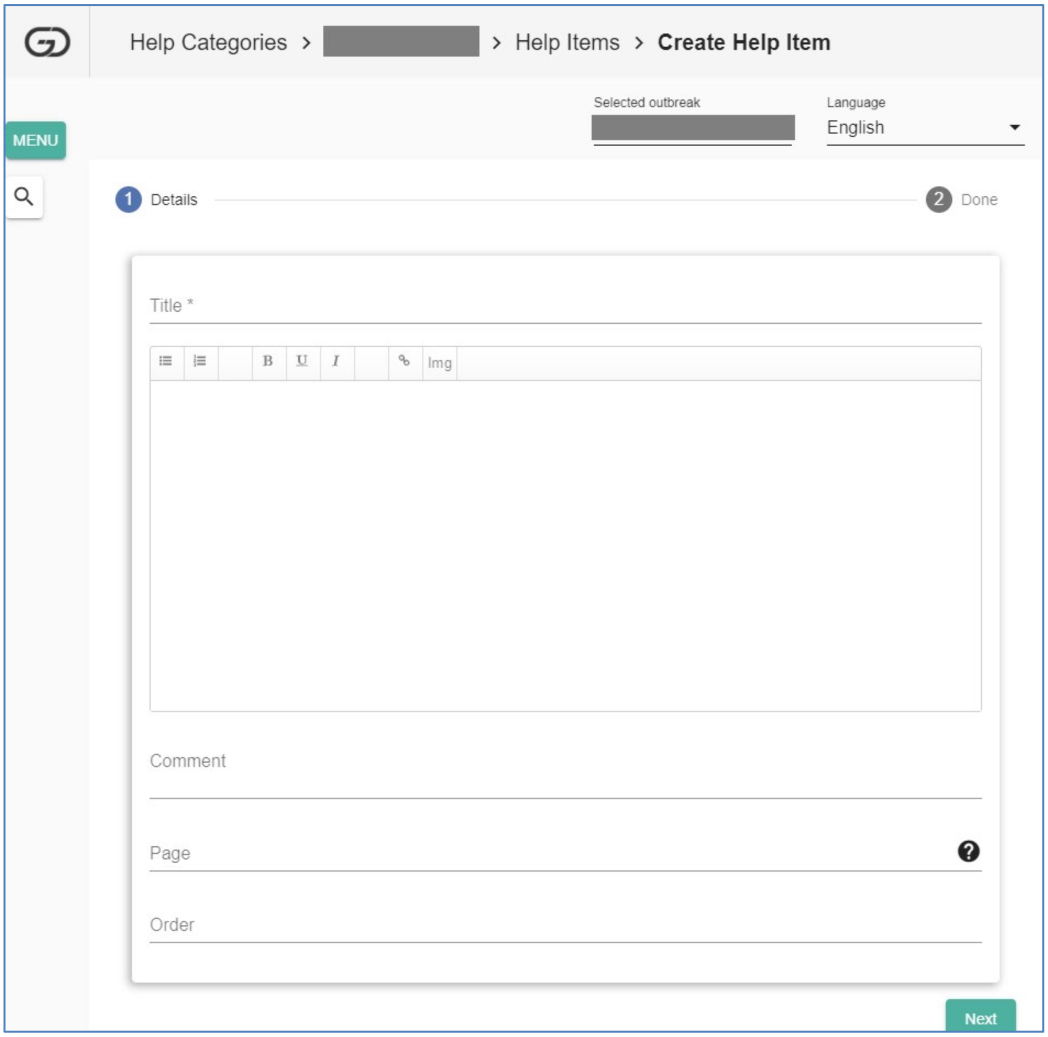
   - **Name**: Enter a name for the help category. Required.
   - **Order**: Enter the order in which Go.Data displays the help category in the Help categories list. Required.
   - **Description**: Enter a brief description that helps the user understand the types of help items within the help category.
5. Click the **Next** button.

   Go.Data displays a data entry completed message.
6. Click the **Create category** button.

   Go.Data displays the Help category details and a confirmation message.

Adding and modifying help items

Depending on your permissions, you may add or modify help items at any time. When adding help items to Go.Data, you are adding documentation to your specific instance of the application.



The active outbreak does not affect the help items and categories Go.Data displays.

When adding a new help item to Go.Data, you must add it to an existing Help category. For more information, see Help categories list.

To add or modify a help item

1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. Hover over a help category and click the **See help items** icon.

   Go.Data displays the Help items list.

4. To add a new help item, click the **Add** button. To modify an existing help item, hover over an existing help item and click the **Modify item** icon.

   Go.Data displays the Help item fields.
5. Complete the Complete help item fields:
   - **Title**: Enter a name for the help item. Required.
   - **Text field**: Enter the content for the help item. The text field allows you to include simple text formatting, including unordered lists, ordered lists, bold, underline, italics, and hyperlinks. Using the **image** button, you can add an image to the help item.
   - **Comment**: Enter a comment related to the help item.
   - **Page**: Provide the link to the related page in Go.Data. For example, /contacts/*/view, where * will replace the ID from the URL.
   - **Order**: Determines the position of the help item in the help category. Order 1 indicates the help item will be first, order 2 indicates the help item will be placed second, and so on.
6. Click the **Next** button.

   Go.Data displays a data entry completed message.
7. Click the **Create help item** button.

   Go.Data displays the Help item created message.

Approving help items

Subject to your user permissions, you can approve help items. Help category deletes are soft deletes, thus it is possible to restore records if it becomes necessary.

To approve a help item

1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. Hover over the help category and click the **See help items** icon.

   Go.Data displays the Help items list.
4. Hover over the help item to be approved and click the **Approve** icon.

   Go.Data displays a confirmation message.

Deleting help categories

Subject to your user permissions, you can delete help categories.

To delete a help category

1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. Hover over a help category and click the **Options** icon.
4. Click **Delete category**.

   Go.Data displays the Are you sure you want to delete this help category? message.
5. Click **YES**.

   Go.Data displays a confirmation message.

Deleting help items

Subject to your user permissions, you can delete help items.

To delete a help category

1. Select **Menu > Help**.

   Go.Data displays the Help list.
2. Click the **Manage help categories** button.

   Go.Data displays the Help categories list.
3. Hover over a help category and click the **See help items** icon.

   Go.Data displays the Help items list.
4. Hover over a help item and click the **Options** icon.
5. Click **Delete item**.

   Go.Data displays the Are you sure you want to delete this help item? message.
6. Click **YES**.

   Go.Data displays a confirmation message.