

ExportXLS v3.3 Installation Guide

New Installation

If you have never installed or used previous versions of ExportXLS, please read the ExportXLS v3.3 User's Guide to get familiarized with this i2b2 Webclient plugin first, and then follow the following steps:

- 1) Unzip this ExportXLS v3.3 package.
- 2) Copy the entire */ExportXLS* folder (with its files & subfolders) into your i2b2 */webclient/js-i2b2/cells/plugins/standard* folder (e.g. */var/www/html/webclient/js-i2b2/cells/plugins/standard*).
 - Note that in order to match most standard default i2b2 installations, the */ExportXLS* folder is nested within */webclient/js-i2b2/cells/plugins/standard/ExportXLS* in this package.
- 3) Copy the *jquery-1.6.1.min.js* file into your */js-ext* subfolder under the */webclient* folder.
 - Note that in order to match most standard default i2b2 installations; this file is in the */webclient/js-ext* sub-folder in this package.
- 4) Modify your */webclient/default.html* file to insert the red bold statements below (in relation to the existing statements, in black, as indicated) in order to use the *jquery* library file (added in the previous step):

```
[..]
<!-- External libraries -->
<script type="text/javascript" src="js-ext/prototype.js"></script>
<script type="text/javascript" src="js-ext/firebug/firebugx.js"></script>
<script type="text/javascript" src="js-ext/excanvas.js"></script>
<script type="text/javascript" src="js-ext/jquery-1.6.1.min.js"></script>
</script>
    var $j = jQuery.noConflict();
</script>

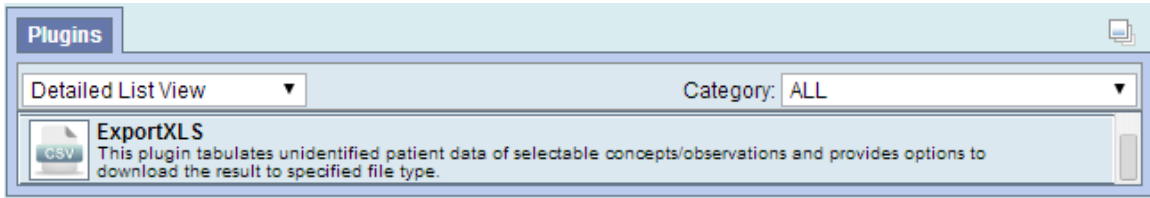
<!-- load i2b2 framework -->
[..]
```

- 5) Copy the entire */export-files* folder (with its files) into your i2b2 */webclient* folder (overwriting existing older files if applicable).
 - Note that in order to match most standard default i2b2 installations; this file is in the */webclient* folder in this package.
- 6) Add the following (bold red) statements to your */webclient/js-i2b2/i2b2_loader.js* file in order to add the plugin to the analysis tool list:

```
[..]
i2b2.hive.tempCellsList = [
[..]
  { code: "ExportXLS",
    forceLoading: true,
    forceConfigMsg: { params: [] },
    forceDir: "cells/plugins/standard"
  },
[..]
```

- 7) Review the preferences of your installation and carry out the steps outlined in the “**Fine-tuning Your Configuration**” section below (near end of this document).
- 8) You may need to restart your i2b2 webclient browser after clearing its cache to pick up these updates.

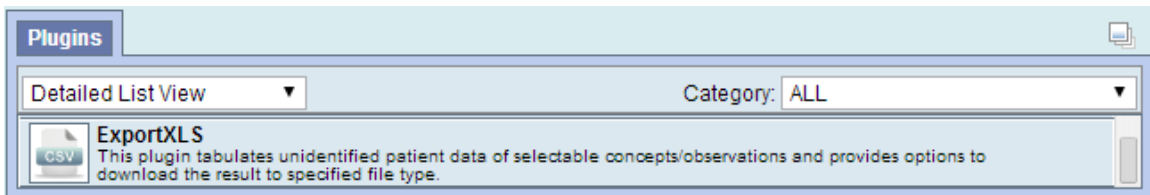
- 9) You should then see the link of this plugin getting displayed (near right hand bottom – you may need to scroll to find it) when you go to the “Analysis Tools”:



Upgrade From Earlier Version

Please read the ExportXLS v3.3 User’s Guide to get familiarized with the new features of this i2b2 Webclient plugin first, and then follow the following steps:

- 1) Rename your current */ExportXLS* folder in your i2b2 */webclient* folder (e.g. */var/www/html/webclient/js-i2b2/cells/plugins/standard*) to something different (e.g. */ExportXLS-OLD* or */ExportXLS-vX.X*), or simply delete the entire folder (and its subfolder and files)
- 2) Copy the entire */ExportXLS* folder (with its files & subfolders) into your i2b2 */webclient/js-i2b2/cells/plugins/standard* folder.
 - Note that in order to match most standard default i2b2 installations, the */ExportXLS* folder is nested within */webclient/js-i2b2/cells/plugins/standard/ExportXLS* in this package.
- 3) Copy the entire */export-files* folder (with its files) into your i2b2 */webclient* folder (overwriting existing older files if applicable).
 - Note that in order to match most standard default i2b2 installations; this file is in the */webclient* folder in this package.
- 4) Review the preferences of your installation and carry out the steps outlined in the “**Fine-tuning Your Configuration**” section below (near end of this document).
- 5) You may need to restart your i2b2 webclient browser after clearing its cache to pick up these updates.
- 6) You should then see the link of this plugin getting displayed (near right hand bottom – you may need to scroll to find it) when you go to the “Analysis Tools”:



Fine-tuning Your Configuration

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

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


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

```

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

```

 hidden (display:none)

 enabled (display:block)

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

e.g. to enable "Birth Date", change from its

```

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

```

to

```

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

```

e.g. to hide "Birth Year", change from its

```

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

```

to

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

...

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

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

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

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

- If "City" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\State\Townname\ZZZZZ", then "City" will be displayed as "Townname".
- If "ZIP" is selected (i.e. `` in excerpt below); and if the institution's "statecityzip_path" data is of the form of "Zip codes\State\Townname\ZZZZZ", then "ZIP" will be displayed as "ZZZZZ".

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

