SEPAN v0.1 Starter Setup & Use

How to import the SEPAN Starter into Grist, configure it for your programme, and test it before operational use.

What you are receiving. SEPAN_v0.1_Starter.grist is a complete Grist document, not a flat spreadsheet. It contains the SEPAN database structure, pages, relationships, configuration tables, validation rules, and the Record and Explore interfaces. You do not need to rebuild SEPAN in Grist; you import the document and then configure your own working copy.

Before you start. Keep one untouched copy of the downloaded Starter file. Use fictional records while configuring and testing. Do not enter operational or sensitive information until governance, permissions and backup arrangements have been agreed.

1. Create or sign in to a Grist account

Hosted Grist: docs.getgrist.com

Open the site in a modern browser and sign in or create an account when prompted. A personal Grist site is sufficient for testing SEPAN. If your organisation already has a Grist team site or a self-hosted Grist deployment, use that environment instead.

Before inviting other users, decide which account or organisation will own the SEPAN document. The document owner should also control access, backups and administration.

Which Grist environment should I use?

Option	Typical use
Personal site	Individual testing, demonstrations and small pilots.
Team site	Organisation-managed work with several users and shared ownership.
Self-hosted Grist	Organisations that operate their own Grist server and manage authentication, storage and backups locally.

2. Import the SEPAN Starter

Use Grist's document import route so the whole SEPAN document is restored, including its pages, tables and widgets.

1. **Download the Starter.** From trysepan.org, download SEPAN_v0.1_Starter.grist. Keep the original file unchanged.
2. **Open your Grist home screen.** Sign in at docs.getgrist.com, or open the Grist site used by your organisation.
3. **Choose Add New → Import document.** Do this from the Grist home screen. Do not treat the .grist file as a CSV or import it into an unrelated document.
4. **Select SEPAN_v0.1_Starter.grist.** Grist will create a new document from the file and preserve the SEPAN structure.
5. **Rename the working copy.** Use a clear deployment name, for example "SEPAN - [Country / Programme] - Pilot".

After import, check that you can see the following:

- SEPAN · Record - the guided data-entry and review interface.
- SEPAN · Explore - descriptive pattern, trend and data-quality views.
- Configuration and code-list tables for programme choices such as localities and species.
- The underlying relational tables, including Reports, Encounters and linked records such as responses, captures, releases/relocations and bites.

3. Use SEPAN through Record and Explore

For routine users, start with SEPAN · Record.

Use Record for incoming information and review. A Report preserves what was received from the source. Review can then determine whether it describes a new Encounter, an existing Encounter, needs clarification, or should remain only as a Report.

Important: do not rewrite the source Report to make it "cleaner". Reviewed information belongs in the Encounter and linked records. Keeping the source account separate supports auditability, duplicate handling and analyses such as identification agreement over time.

For analysts and managers, use SEPAN · Explore.

Explore is intended for descriptive questions such as where and when encounters occur, how reporting changes, identification agreement, responses, captures, releases/relocations, bites, individual histories and data quality. Counts and trends do not by themselves establish cause or risk.

For administrators, configure before redesigning.

- Change localities, species, code lists and deployment settings to fit the programme.
- Retain explicit Unknown, Unidentified and Approximate options so users are not forced to invent precision.
- Do not delete tables, relationships, formula fields or technical structures simply because they are unfamiliar.
- Treat schema or database changes as versioned changes: back up first and test structural modifications with fictional data.

4. Configure your working copy

Configure	Decide or check
Deployment	Programme name, country/region, language and version/release status.
Localities	Replace or extend the locality list with places meaningful to the programme. Use a scale that supports decisions without creating false precision.
Species	Review the species list and retain Unknown / Unidentified and uncertainty options.
Code lists	Review encounter settings, response actions, bite circumstances and other controlled choices. Document changes once a pilot begins.
Users and roles	Decide who may contribute, review, respond, analyse and administer. Real authority should come from Grist permissions and access rules, not just a role chosen in the interface.
Sensitive data	Decide who can see precise locations, contact details, sensitive species records and any health-linked information.
Backups	Name the person or team responsible for backups, recovery testing and structural upgrades.

5. Test before entering live data

A useful first test is not simply whether one row can be entered. Test whether the workflow remains understandable when records are uncertain, duplicated, linked and reviewed.

- One ordinary single-report encounter.
- Two reports describing the same encounter, to test Report-Encounter linkage and duplicate handling.
- An uncertain or incorrect species identification, keeping species-as-reported separate from the reviewed identification.
- An approximate date or broad location, confirming the system does not force false precision.
- An encounter with a response action.
- A capture/check and release/relocation workflow, if your programme uses those modules.
- A bite record, if relevant to the pilot, without treating SEPAN as a clinical record.
- Record and Explore tested from a non-owner account with realistic permissions.

After the test, ask:

- Could a normal user record the case without understanding the raw database tables?
- Could reviewers distinguish the source Report from the reviewed Encounter?

- Did uncertainty remain visible rather than being converted into precise values?
- Did linked records remain understandable?
- Could Explore answer the programme questions you care about?
- Did permissions prevent the wrong users from seeing or changing sensitive information?

6. Sharing, permissions and backups

Sharing

Use Grist's sharing controls to give collaborators only the access they need. Test access with non-owner accounts before launch. A downloaded .grist backup does not carry over the sharing arrangements of the original hosted document, so access must be configured again when a backup is restored.

Backups

Download the whole Grist document as a .grist file before structural changes, migrations or major configuration work. Store the backup in your organisation's approved location and periodically confirm that it can be restored into a safe test workspace.

Interface updates and database migrations

Compatible Record and Explore interface improvements may be delivered without replacing an organisation's accumulated data. Structural schema changes are different: they should be explicit, versioned, backed up and tested before being applied to an operational deployment.

Internet access

If a SEPAN deployment uses centrally hosted custom interfaces, those components require internet access. A disconnected programme should use a deliberately pinned or offline deployment rather than assume that the hosted interface will work without connectivity.

7. Quick reference

Place	Use
docs.getgrist.com	Create or sign in to a hosted Grist account and open your personal or team site.
SEPAN · Record	Guided recording and review workflow.
SEPAN · Explore	Patterns, trends and data-quality checks.
Configuration / code lists	Programme-specific species, localities and controlled choices.
Raw relational tables	Underlying data structure; mainly for administrators and technical users.
trysepan.org	Current SEPAN release, Starter download, documentation and collaboration information.

Official Grist help

- Getting started
- Creating/importing a document
- Exports and backups
- Workspaces

Before operational launch: confirm governance, permissions, sensitive-data handling, backups, recovery, local administration and user support. SEPAN is an information and decision-support system; it does not replace emergency medical services, clinical records or local snakebite guidance.