

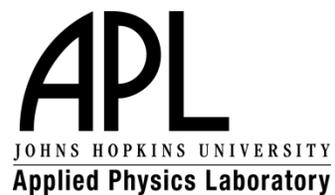
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# OpenESSENCE Administration Guide

*For the OpenESSENCE demo site*

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## INTRODUCTION

OpenESSENCE is highly flexible and customizable. Components such as data types, records types, column names, language and font are all customizable. Each implementation of the system will be unique. The best way to start learning about the tool is to use the OpenESSENCE demonstration (or 'demo') site, which is hosted by JHU/APL. The site contains sample data, and allows for entry of both cased-based and aggregate data. All of the OpenESSENCE analysis and visualization tools are available on the demo site. The site is meant to be a representation of an actual instance of OpenESSENCE that would be implemented in a country, region, or geographic area.

This Administration Guide is based on the OpenESSENCE demo site. An actual implementation of OpenESSENCE will likely appear different than the demo site. However, the administration features and concepts remain the same.

## GETTING STARTED

OpenESSENCE includes several administration functions which are accessible using an administrator username and password. In the demo site, the following lists can be administered: Districts, Age Groups, Diagnoses, Symptoms, Temperature Groupings, and Users. These lists are maintained as reference tables in the OpenESSENCE database. An OpenESSENCE administrator can maintain these lists as needed. For example, a new username and password can be created when a new individual needs access to OpenESSENCE. Or, the list of available districts and age groups can be modified as needed. The lists are used in the data entry and query forms in OpenESSENCE.

Since OpenESSENCE is highly customizable, an actual implementation will likely have more administration options (more lists that can be maintained), depending on the data elements that have been chosen to be collected. For example, there may be a list of reportable diseases available when entering a new case visit record. That list can be maintained by the OE administrator.

The subsequent sections of this guide describe the administration functions available on the OpenESSENCE demo site.

### Log in to the OpenEssence Demo Site

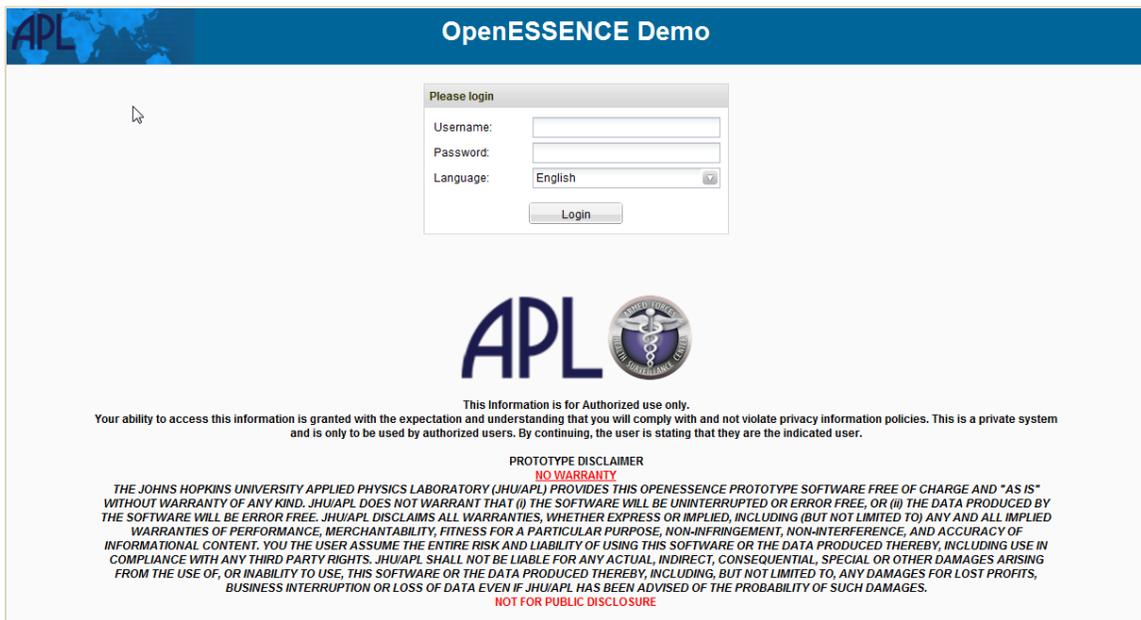
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1. Using a web browser, go to the following web address:  
<https://128.244.178.159/openessence>

2. In the **Username** field, type the username.
3. In the **Password** field, type the password.

NOTE: After the initial installation, OE has two default accounts, (one for user and one for administrator). To access the administration options, you must login using the administrator account.

4. Select the appropriate language from the **Select Language** list.
5. Click **Login**.

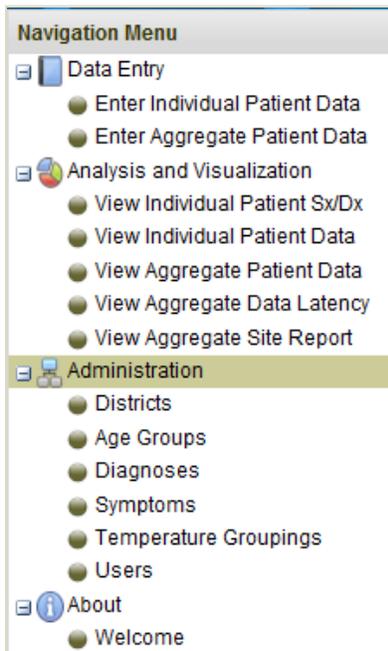


A typical OpenESSENCE installation has two types of accounts or user-roles (a general user and an administrator). For example, a user account allows for general data entry, modification, deletion, and analysis. Multiple accounts can be created, so that each user can have a unique user name. An administrator account allows for maintenance of reference tables and creation of additional user accounts.

## ADMINISTRATION

The Administration options in OpenESSENCE are designed to be used by the system administrator and are only available on the screen when logged in using an administrator account. The administration options for the demo site include:

- District Maintenance                      Add, edit, or delete districts (used in the **District** pull-down list on the data input and query forms)
- Age Groups Maintenance                      Add, edit, or delete age groups
- Diagnoses                                      Add, edit, or delete items from the list of diagnoses (used in data entry and query forms)
- Symptoms                                      Add, edit, or delete items from the list symptoms (used in data entry and query forms)
- Temperature Groupings                      Set the Fever/No Fever minimum and maximum
- Users    Add, edit, or delete user accounts



## Add a District

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1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Districts**. A new tab named **Districts** appears in the right hand window of the Demo screen.
3. Click **New** to add a new district. A new tab appears below the list of existing districts.
4. Enter the appropriate information in the data fields. All of the fields are required.

NOTE: The **Order** field is used to define the order in which the districts will appear in the pull-down list (in the data entry forms and query forms). The lower the order number, the higher that item will appear in the list. For example, District 1 has an order number of 1 and District 2 has an order number of 2; therefor District 1 will appear ahead of District 2 in the pull-down list.

OE-ID	Name	Order
D1	District 1	1
D10	District 10	10
D11	District 11	11
D12	District 12	12
D13	District 13	13
D14	District 14	14
D15	District 15	15
D16	District 16	16
D17	District 17	17
D18	District 18	18
D19	District 19	19
D2	District 2	2
D20	District 20	20

New... \*  
OE-ID:\*   
Name:\*   
Order:\*   
Save

5. Click **Save** to create the new district.
6. To modify or delete an existing district, select the relevant district from the list of districts, and then click **Edit** or **Delete** from the menu bar in the **Districts** tab.

## Add an Age Group

1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Age Groups**. A new tab named **Age Groups** appears in the right hand window of the Demo screen.
3. Click **New** to add a new age group. A new tab appears below the list of existing age groups.
4. Enter the appropriate information in the data fields.

NOTE: The **Order** field functions the same way as described previously.

OE-ID	Age Group	Age Group Minimum (Inclusive)	Age Group Maximum (Inclusive)	Order
1	0-1 year old	0	0	00
11	1-4 yrs old	1	4	01
12	5-14 yrs old	5	14	05
13	15-24 yrs old	15	24	15
14	25-34 yrs old	25	34	25
2	35-44 yrs old	35	44	35
3	45-54 yrs old	45	54	45
4	55-64 yrs old	55	64	55
5	65-74 yrs old	65	74	65
6	75+ yrs old	75	999	75

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**New... \***

Age Group:\*

Age Group Minimum (Inclusive):\*

Age Group Maximum (Inclusive):\*

Order:

Save

5. Click Save to create the new age group.
6. To modify or delete an existing age group, select the relevant age group from the list of age groups, and then click **Edit** or **Delete** from the menu bar in the **Age Groups** tab.

## Add a Diagnosis

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1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Diagnoses**. A new tab named **Diagnoses** appears in the right hand window of the Demo screen.
3. Click **New** to add a new diagnosis. A new tab appears below the list of existing diagnoses.
4. Enter the appropriate information in the data fields.

The screenshot shows the 'Diagnoses' tab in the OpenESSENCE application. At the top, there is a menu bar with 'New...', 'Edit...', and 'Delete' options. Below this is a table listing existing diagnoses. The table has three columns: 'OE-ID', 'Name', and 'Order'. The 'Order' column is currently sorted in ascending order. Below the table is a pagination bar showing 'Page 1 of 1'. At the bottom of the screenshot, there is a 'New...' tab with a form to add a new diagnosis. The form has two input fields: 'Diagnosis Name:\*' and 'Order:'. A 'Save' button is located at the bottom of the form.

OE-ID	Name	Order ▲
1	Asthma	1
2	Bronchitis	2
3	Cholera	3
4	Dengue	4
5	Diarrhea/Vomiting	5
6	Ear Infection	6
7	HIV	7
8	Malaria	8
9	Measles	9
10	Bacterial Meningitis	10
11	Typhoid	11
12	URTI	12

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**New... \***

Diagnosis Name:\*

Order:

Save

5. Click **Save** to add the new diagnosis to the list.
6. To modify or delete an existing diagnosis, select the relevant diagnosis from the list and then click **Edit** or **Delete** from the menu bar in the **Diagnoses** tab.

## Add a Symptom

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1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Symptoms**. A new tab named **Symptoms** appears in the right hand window of the Demo screen.
3. Click **New** to add a new symptom. A new tab appears below the list of existing symptoms.
4. Enter the appropriate information in the data fields.

OE-ID	Name	Order ▲
1	Abdominal Pain	1
2	Cold	2
3	UNKNOWN3	3
4	Coryza	4
6	Cough	6
7	Dehydration	7
8	Diarrhea	8
9	Fever	9
10	Flushing	10
11	Headache	11
12	Joint Pain	12
13	Muscle Pain	13
14	Nosebleed	14
15	Rash	15
16	Shock	16
17	Sore throat	17
18	Stomach Pain	18
19	Vomit	19

New... \*  
Symptom Name:\*   
Order:   
Save

5. Click **Save** to add the new symptom to the list.
6. To modify or delete an existing diagnosis, select the relevant symptom from the list and then click **Edit** or **Delete** from the menu bar in the **Symptoms** tab.

## Add a Temperature Grouping

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Two temperature groupings currently exist in the OE demo site: Fever and No Fever. The Fever temperature range is set to 100°F or greater. The No Fever temperature range is set to 99.999°F or less. If necessary, you can add adjust these temperature range groupings or add a new grouping.

1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Temperature Groupings**. A new tab named **Temperature Groupings** appears in the right hand window of the Demo screen.
3. Click **New** to add a new temperature grouping. A new tab appears below the list of existing temperature groupings.

The screenshot shows the 'Temperature Groupings' interface. At the top, there is a tab labeled 'Temperature Groupings \*'. Below the tab is a menu bar with 'New...', 'Edit...', and 'Delete'. A table displays the current groupings:

OE-ID	Temperature Group Name	Temperature(F) Minimum (Inclu...	Temperature(F) Maximum (Inclu...	Order ▲
2	Fever	100	200	1
3	No Fever	0	99.999	2

Below the table is a pagination bar showing 'Page 1 of 1'. Underneath is a 'New...' form with the following fields:

- Temperature Group Name:\*
- Temperature(F) Minimum (Inclusive):\*
- Temperature(F) Maximum (Inclusive):\*
- Order:

A 'Save' button is located at the bottom of the form.

4. Click **Save** to create the new grouping.
5. To modify or delete an existing temperature grouping, select the relevant grouping from the list and then click **Edit** or **Delete** from the menu bar in the **Temperature Groupings** tab.

## Create a New User

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1. On the OpenESSENCE Demo screen, locate the **Navigation Menu** on the left.
2. Under **Administration**, click **Users**. A new tab named **Users** appears in the right hand window of the Demo screen.
3. Click **New** to add a new user. A new tab appears below the list of existing users.
4. Enter the information for the new user in the appropriate fields.

**NOTE: Enable, Non-Expired, Credentials Non-Expired, and Account Non-Locked** should all be checked when creating a new user account. You can use these options to disable or lock user accounts at a later time if necessary. User accounts can also be edited and deleted when necessary. The **Password** field has an automatic strength checker to ascertain the strength of your password.

The screenshot shows a 'New...' user creation form. It contains the following fields and controls:

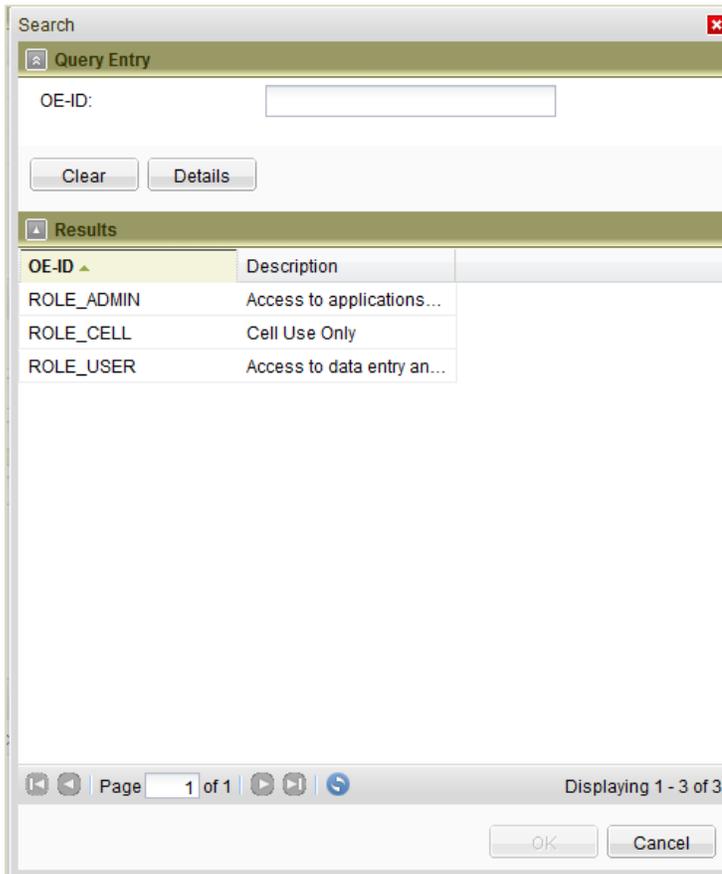
- UserName:\* (text input)
- Password:\* (password input with a strength indicator bar)
- Confirm Password:\* (text input)
- Enabled:\* (checkbox)
- Non-Expired:\* (checkbox)
- Credentials Non-Expired:\* (checkbox)
- Account Non-Locked:\* (checkbox)
- Role(s):\* (dropdown menu)

Below the Role(s) field is a table with the following structure:

OE-ID	Description
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The 'Add...' button in the table header is circled in red. A 'Save' button is located at the bottom left of the form.

5. You must add a role for the new user, to define whether it is regular user account or an administrator account. Click **Add** from the table next to the **Roles** field. A list of existing roles appears in a new window.



6. Select a role and click **OK**.

NOTE: ROLE\_CELL is used only for data being entered into OpenESSENCE via SMS; it should not be selected as a role for an OpenESSENCE account.

7. Click **Save** to finish creating the new user.
8. To modify or delete an existing user, select the relevant user from the list of users, and then click **Edit** or **Delete** from the menu bar in the **Users** tab.