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INTRODUCTION

OpenESSENCE is highly flexible and customizable. Components such as data types, record 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

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

1. On the OpenESSENCE Demo screen, locate the Navigation Menu on the left.
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; therefore District 1 will appear ahead of District 2 in the pull-down list.

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.

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

1. On the OpenESSENCE Demo screen, locate the Navigation Menu on the left.
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.
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

1. On the OpenESSENCE Demo screen, locate the Navigation Menu on the left.
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.
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

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.
3. Click New to add a new temperature grouping. A new tab appears below the list of existing temperature groupings.

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

1. On the OpenESSENCE Demo screen, locate the Navigation Menu on the left.
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.

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.