Course Manager

User Guide

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Table of Contents

Overview **4**
General Features **4**
- **Login** 4
- **Application Layout** 5
- **Top Navigation** 6
- **Screen/Page Title (all screens)** 6
- **User Profile Area (all screens)** 7
- **Application Workspace (all screens)** 7
- **Card Views** 8
- **Filtering Card Views and Reports** 9
- **Page/Action Status Update** 11
- **Organization** 11
- **Organization – Contacts** 12
- **Logoff** 13

The Application Screens **14**
- **Student Home Page / Training Transcript** 14
- **Survey** 15
- **Administrator, Director, or Instructor Dashboard [Administration]** 17
- **Classes [Administration]** 19
- **New Class [Administration]** 21
- **Edit Class [Administration]** 22
- **Download Sign-in Sheet [Administration]** 24
- **Grade Class [Administration]** 24
- **Upload Sign-in Sheet [Administration]** 25
- **Documents** 26
- **People** 27
- **View Person** 29
- **Upload Critique** 30
- **Orders (Orders Management)** 30
- **New Order** 32
- **Edit Order (Edit Classroom Materials Order)** 33
- **Pay Order** 35
- **Report – User List** 36

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Report – Student Attendance 37
Report – Class List 38
Report – Instructor Potential 39
Report – Class Evaluations 40
Report – Class Evaluation Details 40
User Management [Administration] 41
Add User [Administration] 42
Edit User [Administration] 42

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Overview

Course Manager was redesigned from the ground up to be easier to use, faster, and more powerful than before. The purpose of the application is to serve as the front-end and back-end for the Surgical Trauma Nurse (STN) course. Administrators and Instructors can view classes, add new classes, and manage all aspects of the classroom workflow through the application.

This user guide covers both standard user roles as well as administration features. When features are noted with **[Administration]**, only users with Administration level access to the application will be able to view or use these features when using the application.

General Features

Login

Before users can access the application, users will need to login. The application requests a username and password for each user before allowing access.

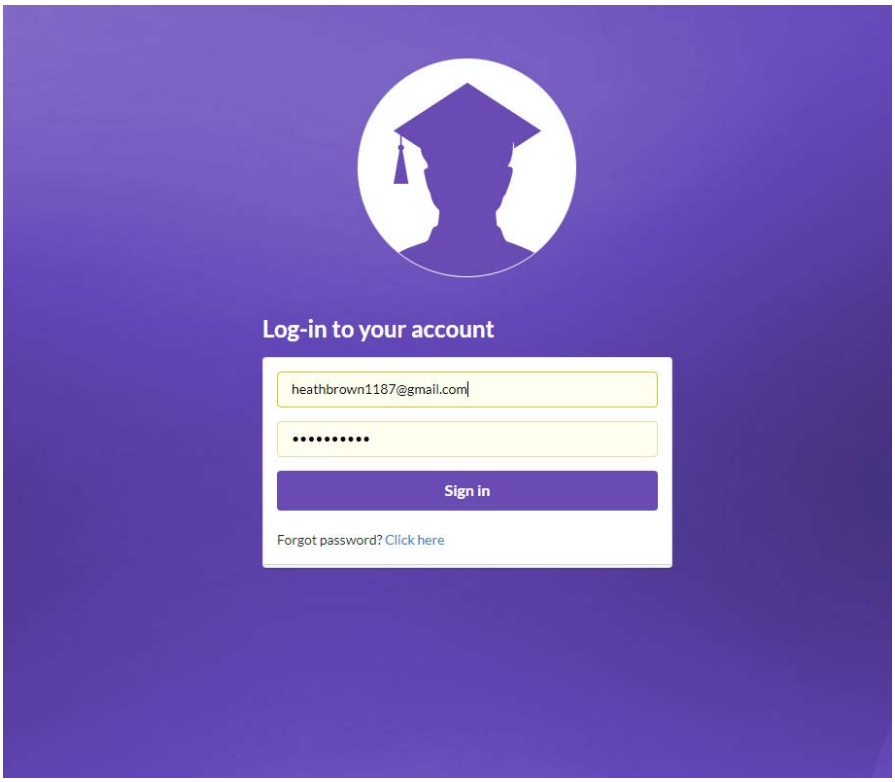

Figure 1 - The Login Screen

Username
The username is the user's email address.

Password
The user must enter their password. Your administrator will inform you of a temporary password you will be assigned for your first-time logging in. After a user logs into the application for the first time, they will be asked to enter a permanent password.

The password field will hide what the user is typing to prevent others seeing their password.

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Application Layout

Every screen in the Course Manager application consists of five sections:

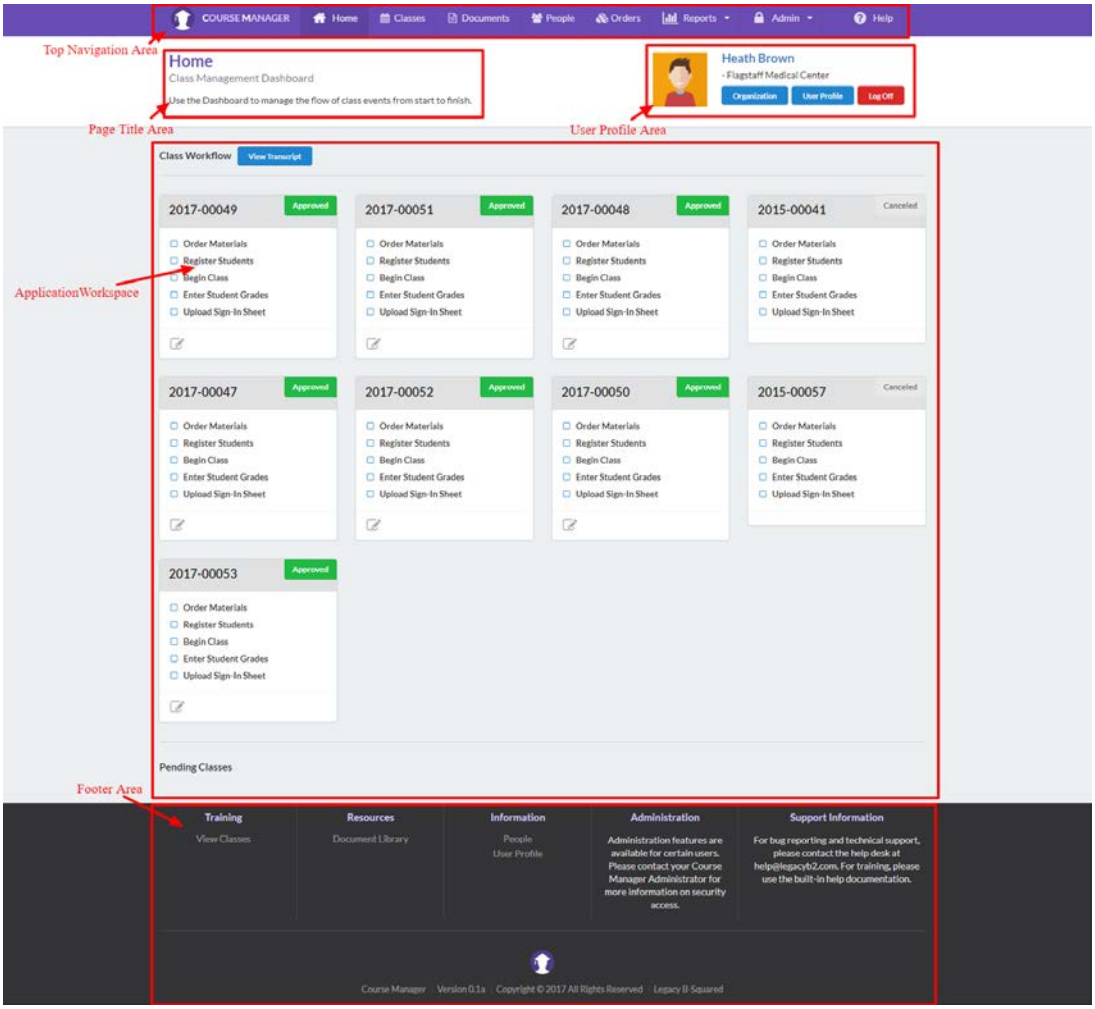

Figure 2 - Application Layout

Top Navigation – The Main Menu of the application.

Screen/Page Title – Below the top navigation and on the upper left of the screen. This area displays the current screen name and a little description.

User Profile – Displays the currently logged in user, which organization the user is currently assigned to, and controls to allow the user to log off or change their organization. The user can also go to a screen to update their personal details or change their password from this section. The User Profile section is located on the top right of the screen below the Top Navigation.

Application Workspace – This area contains the actual content and functionality related to the current screen.

Footer – Contains some links to navigate the application and support information.

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Top Navigation

The Top Navigation area is consistent on every screen a user visits. Some items on the navigation will not appear for users that don't have the proper security level. It is located along the top of the application and will stay on the top even when a user scrolls down any screen.

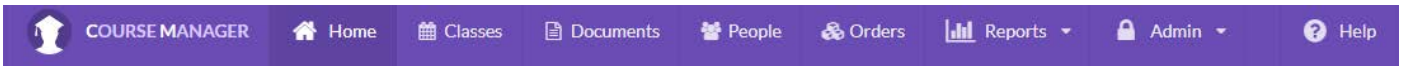


Figure 3 - Top Navigation

Home – When this menu item is clicked, the user will be returned to the Home Dashboard of the application. Users without Administration access will be shown a training history/transcript of the classes they have signed up for or completed.

Classes **[Administration]** – Allows certain users to add new classes and manage all aspects of classroom training in the application.

Documents – Users can download training documents and aids related to the STN training course.

People **[Administration]** – Users can search for people within the application. A user's detail includes information such as address, email, and phone number. The details also display which organizations the user belongs to.

Orders **[Administration]** – Users with the proper security level can handle orders for classroom supplies.

Reports **[Administration]** – Users with the proper security level can view certain reports pertaining to the classroom training effort.

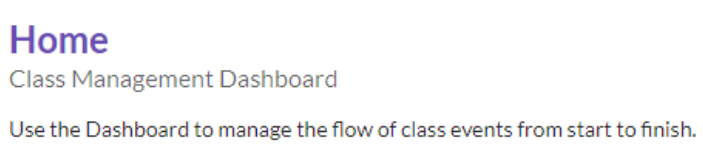
Admin **[Administration]** – Administrators can view and use certain features that handle the core functionality of the Course Manager application such as:

- User Management (add, edit, and remove users)
- Training Locations (manage which locations are available for training at each organization)
- Manage Organizations (add, edit, or remove organizations)
- Region Shipping (handle region pricing for shipping)
- Item Management (for classroom supplies)
- Document Management (upload and maintain online training documents and aids.

Help – Users can fill out a form to receive help with the application or inform the administrators of a problem they are having with the system. In the future, Help will also include an online version of this guide.

Screen/Page Title (all screens)

This area contains information about the current screen the user is viewing as well as a short description of its functionality. See the example below:



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User Profile Area (all screens)

This section displays the currently logged in user's name and organization details. The user can choose to change their ***organization***, view their ***user profile*** (and change their password), or ***log off of the system***.

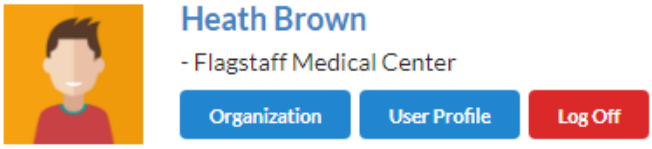

Figure 4 - User Profile Area

Application Workspace (all screens)

This area displays the current screen's features and functionality. This is the real guts of the application and changes according to which screen the user is viewing.

There are several common controls located in the Application Workspace:

- Filtering Controls
- Add New Buttons
- Card Views
- Show More Buttons

The functionality of each screen will be covered in a later part of this user guide. Keep in mind that the user interface is designed to be uniform across the application. Once a single screen's controls are understood, a user should be able to easily learn other screens. The only difference is the actual data being worked with and the available features related to that data.

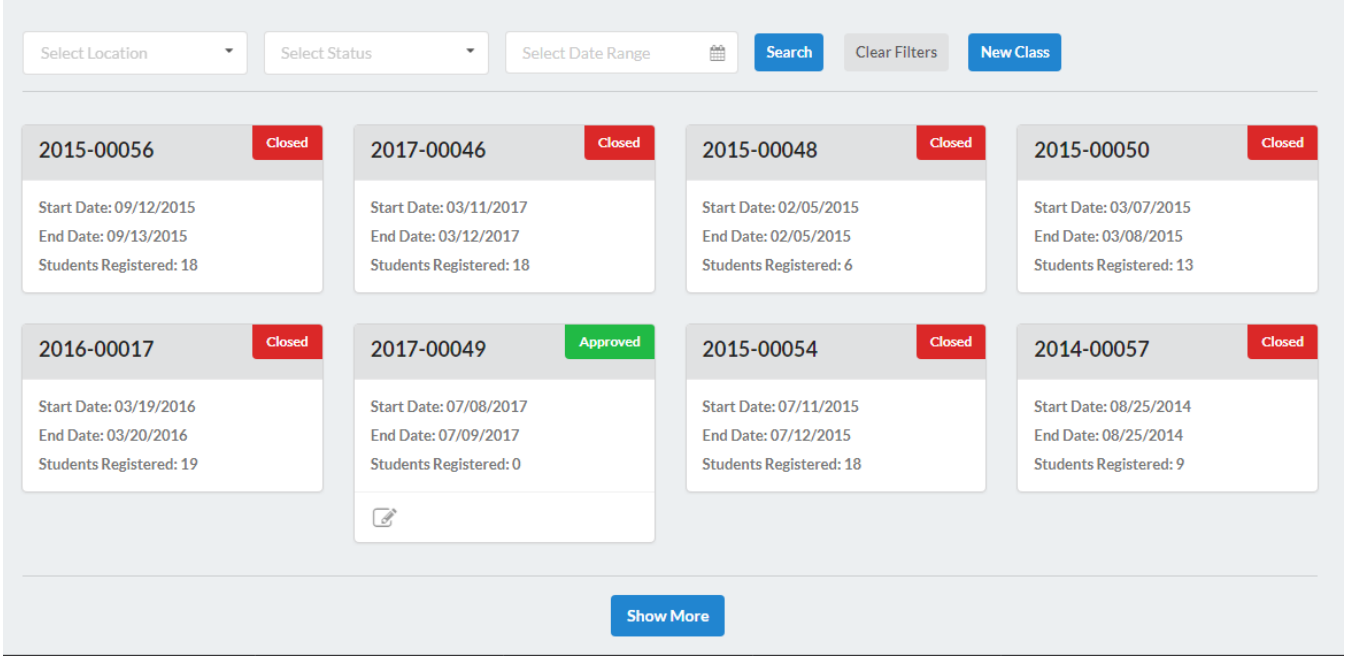

Figure 5 - The Application Workspace

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Footer (all screens)

The footer allows users to navigate to some screens and displays information about the application and support for the application.

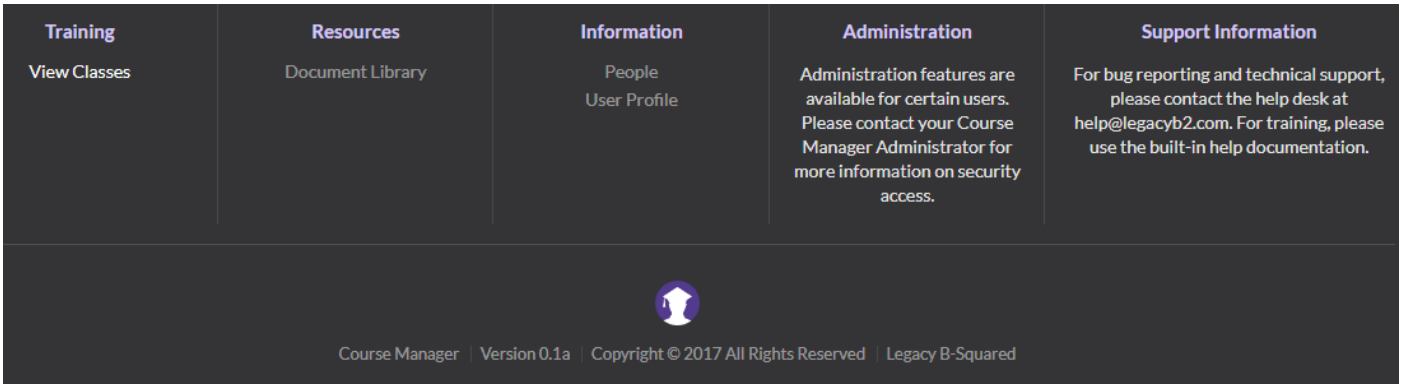

Figure 6 - The Footer

Card Views

A card view is a new layout feature for viewing large lists of data. Instead of the standard ugly table view many older websites use, the card view shows will display data content from left to right, and then goes to the next line when horizontal space is no longer available. The reason the view is called "Card View" is due to each piece of data looking like it is an index card in shape. *See Figure 1.*

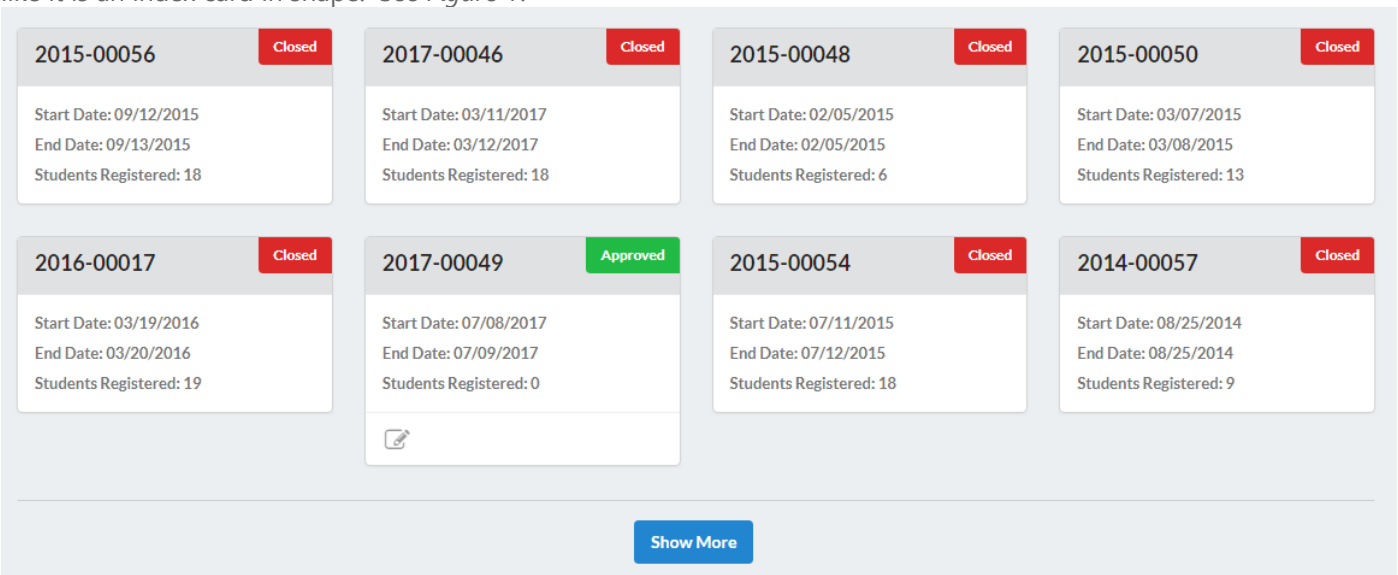

Figure 7 - Sample card view from the Home Dashboard screen

Uniformity – Card views in this application are designed to function similar on each page they are needed. Each card has an identifying piece of data in the top left and a set of action control icons along the bottom (which can sometimes be invisible based on security level or data status).

Title/ID Area – All cards have a title area in the upper left, which is colored with a light grey background. This is usually the dominant identifier for the type of record the card represents (example: For Classes, the title is the class ID). Each card will have a unique title.

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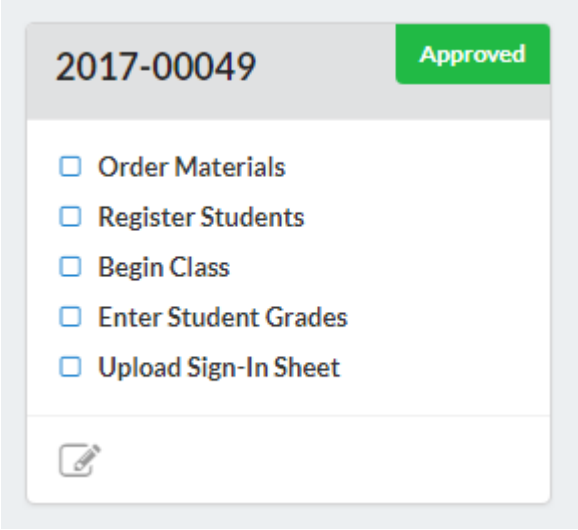

Figure 8 - A sample of an individual card record. This example shows the workflow for a single class on the Home Dashboard page in the Class Workflow section.

Status Area – The status area for most cards is on the upper right. The type of status depends on the type of data. For example, a Class status could be Pending or Approved. A user's status could be Inactive or Active.

Information Area – This area has data specific to the current record for the ID in the Title/ID area. For example, a Class card would display time and date information for the class.

Action Button Area – Along the bottom of every Card is an area for Action Buttons. These buttons allow users and administrators to manage data and information related to the specific card they clicked the action button for. An example would be the Edit Class Action button displayed in *figure 2*. Some action buttons are hidden due to security level or state of the card the record is associated with. Sometimes the entire Action Button Area is hidden when no actions are available for that card.

Show More – Will update the screen with more data if there is more data to display.

Filtering Card Views and Reports

All Card Views and Reports use the same filtering controls, although the data being filtered is different for each screen. The available filter controls are located just above the Application Area of the screen.

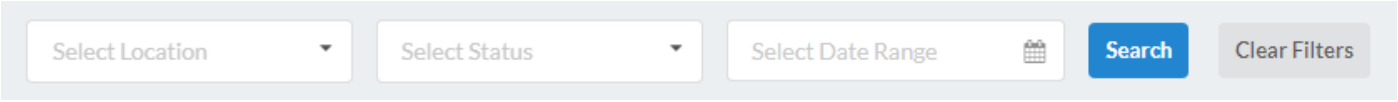

Figure 9 - A sample of filtering controls

Text Entry Field – This type of filter requires the user to type text to find something specific. These fields usually have a hint inside the box indicating what type of data can be searched.

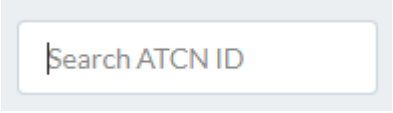

Figure 10 - Sample Text Entry Field. This one requires the user to enter a specific ID to search for.

Drop-down Select – This filter requires the user to click the box. After being clicked, a drop-down menu will open to display a list of available filter parameters to select. The user selected one of the items from the drop-down menu to create a filter based on that selection.

Figure 11a - Drop-down Select before it has been clicked.

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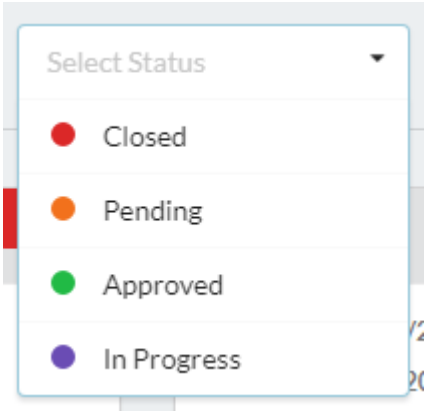

Figure 5b - Drop-down select after the box has been clicked and now displaying the available filter parameters.

Date Range – This filter is an extension of the drop-down select. When clicked it will drop-down two calendars. The one of the left represents the FROM date and the one of the right is the TO date. After the user selects a date from each calendar, they can click *Apply* or *Cancel* to continue. If the user clicks *Apply*, the date range will be set into the filter box.

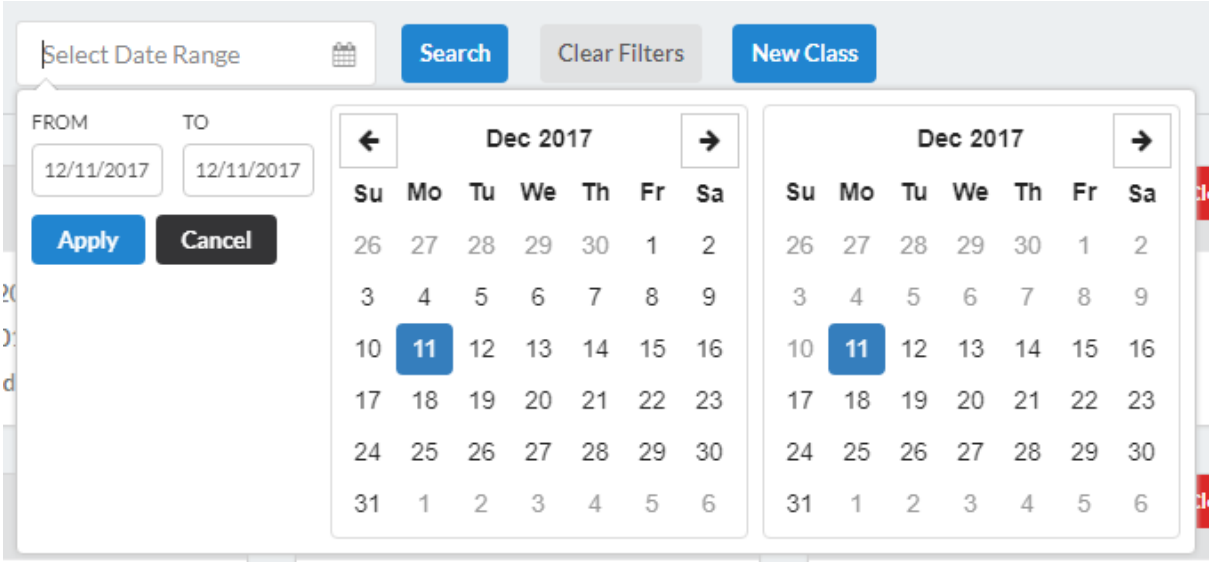

Figure 12 - Sample Date Range Filter

Filter Action Buttons – These two buttons control the overall filtering of the current page. The first button, *Search*, will filter the entire page by all the filters a user has selected from the available filter controls on the page. The page will refresh with the new filtered data. The *Clear Filters* button will clear any data selected in filter controls on the page. If a user wishes to reset the entire set of data on the screen, they would click the *Clear Filters* button and then click *Search* again to return the page to its default state of data.

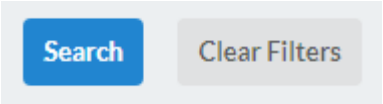

Figure 13 - A Sample of the two Filter Action Buttons on most screens.

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Page/Action Status Update

Some actions will display a status update on the **upper right of the screen** when data has been changed, saved, or there is an error. A green colored status message indicates a successful action, while a red color indicates a failed action. The status update will disappear by itself after a few seconds or clicking the X to the right of the action message will close the status update message.

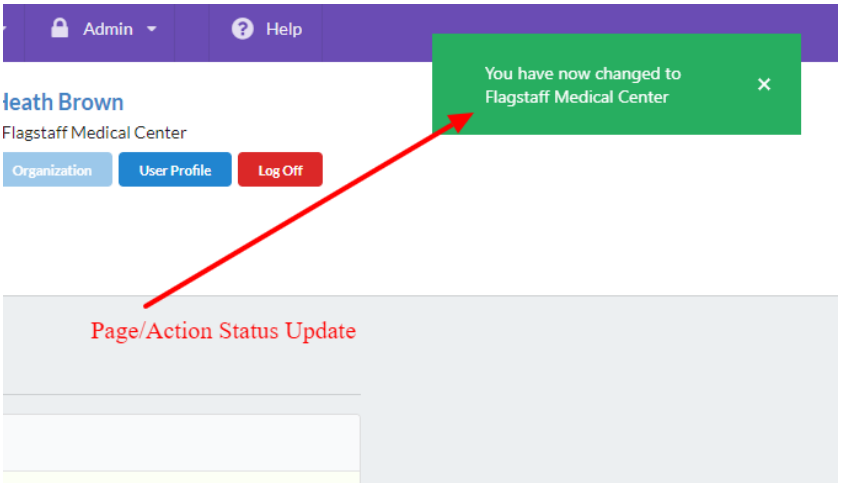

Figure 14 - Page/Action Status Update

Organization

This screen allows the user to select a new Organization. All data in the application is based on which organization the user has currently selected. After a new organization is selected, a green status update will display the change at the top right of the screen and disappear after a few moments.

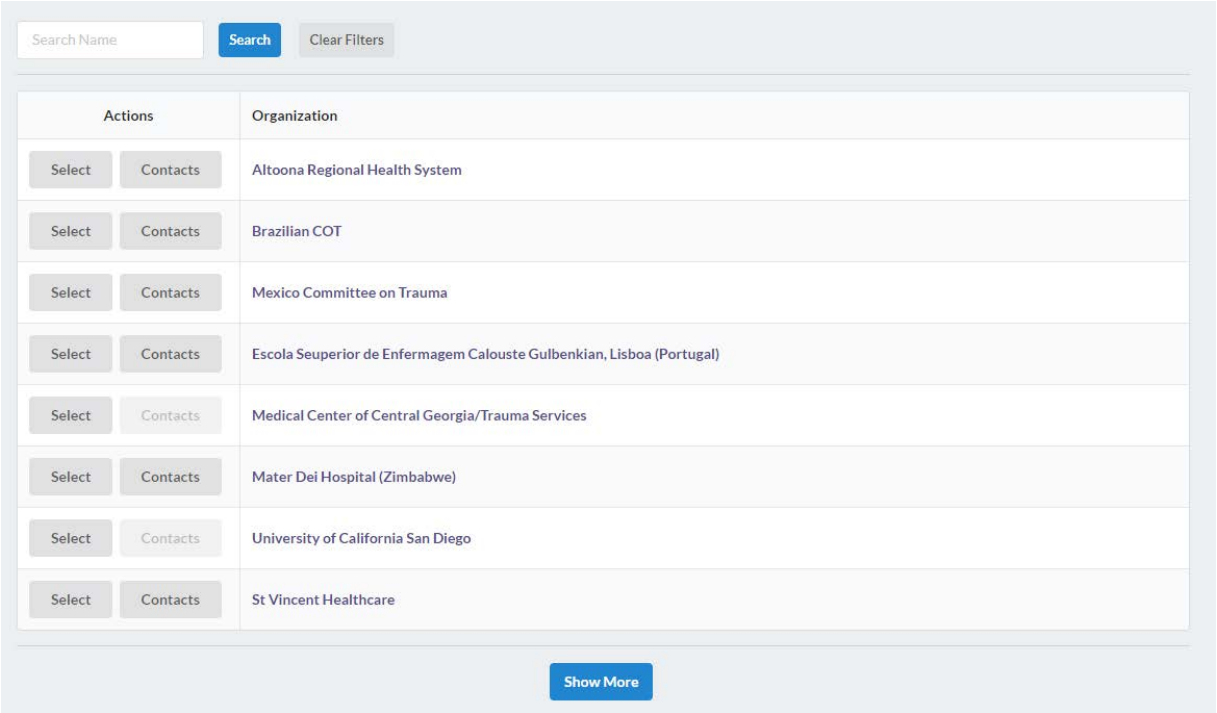

Figure 15 - Organization Screen to change user's organization

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Search by Name Filter – This filter allows the user to search by an organization name. The user need only type a part of the name to begin the search. Clicking the *Search Button* will refresh the list of organizations with the new filtered information. Click *Clear Filters* to clear searches and restore the list of organizations to the default (list all organizations).

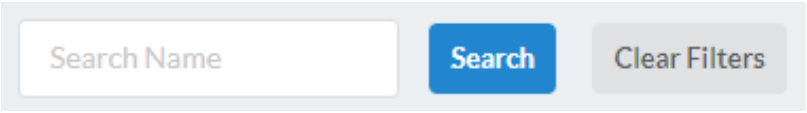

Figure 16 - Search by Name Filter

Actions: Select and Contacts – These buttons are located to the left of each Organization name in the list of organizations.

- **Select** – This button selects the organization to the right of the button in the organization list.
- **Contacts** – Clicking this button takes the user to the Contacts page for the organization.

Show More – Located below the list of organizations. This button will only display if the user has access to more organizations than the screen will display in the first load. Once pressed, the screen will load additional organizations. To load more, the user can simply keep clicking the Show More button.

Organization – Contacts

This screen displays a list of contacts at the selected organization for the contact button they clicked on the previous screen (*Organization*).

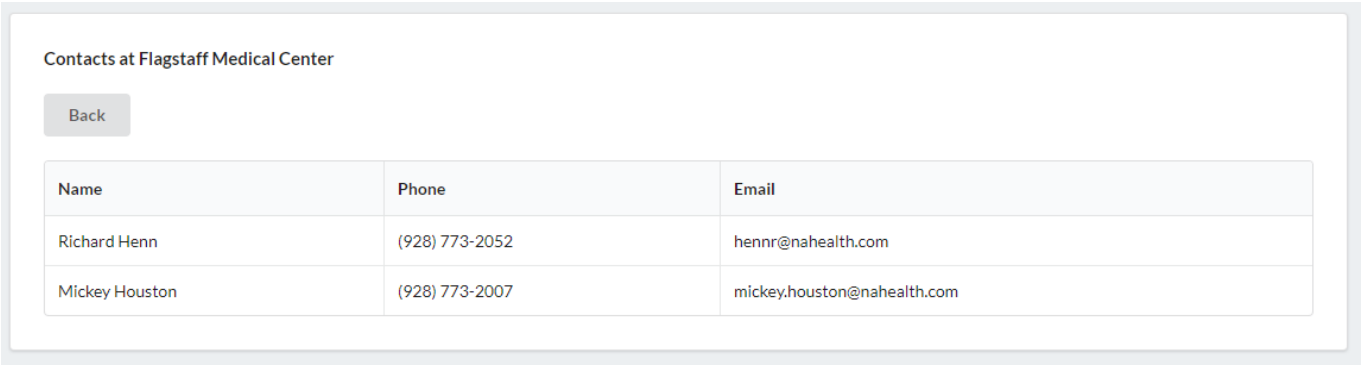

Figure 17 - Organization Contacts Screen

Back – This button is located in the upper left corner of the contact list and returns the user to the previous screen (*Organization*).

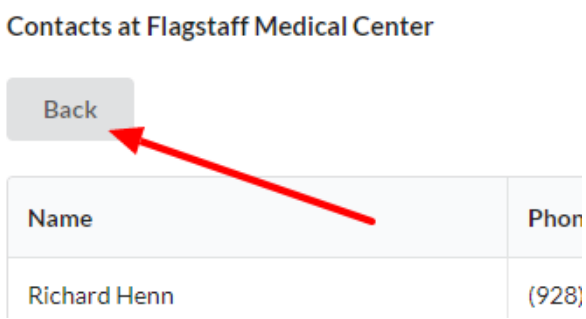

Figure 18 - Back Button on Contacts screen

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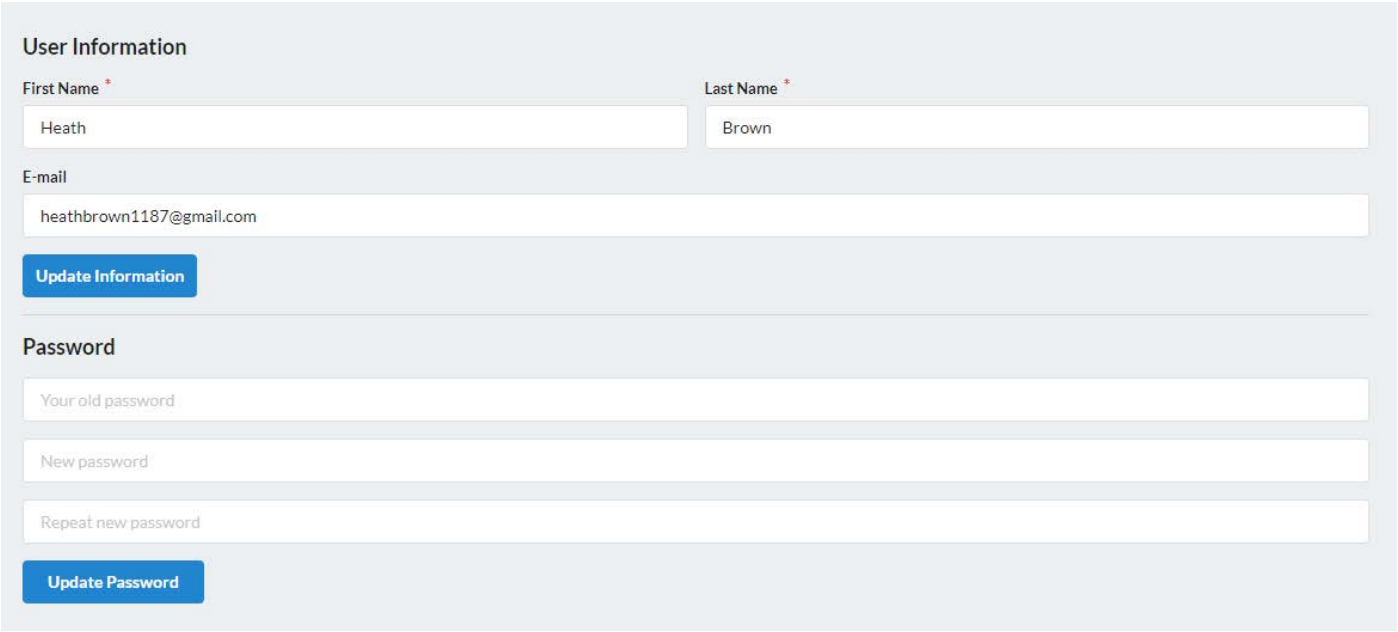
User Profile Screen

This screen allows the user to change personal details of their account and change their password.

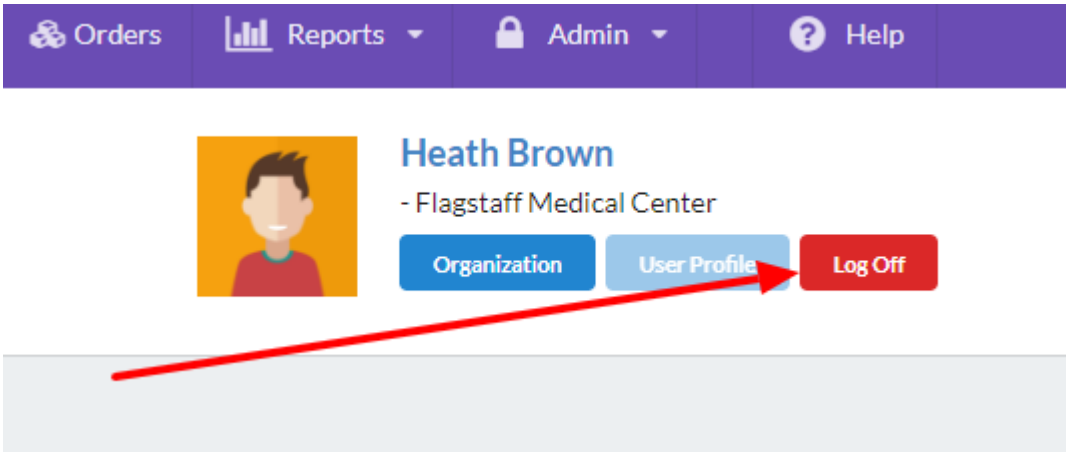


Update Information – This button updates the personal details of the user (First Name, Last Name, and Email Address).

Update Password – This button updates the Password of the user.

Logoff

This button, located in the upper right of the **User Profile Area** of every screen, will log the user off and take them to the ***login screen*** of the application.



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The Application Screens

Student Home Page / Training Transcript

Standard users with no additional security will be sent to the Student Home Page after they login to the application. This screen displays the current user's training transcript (history).

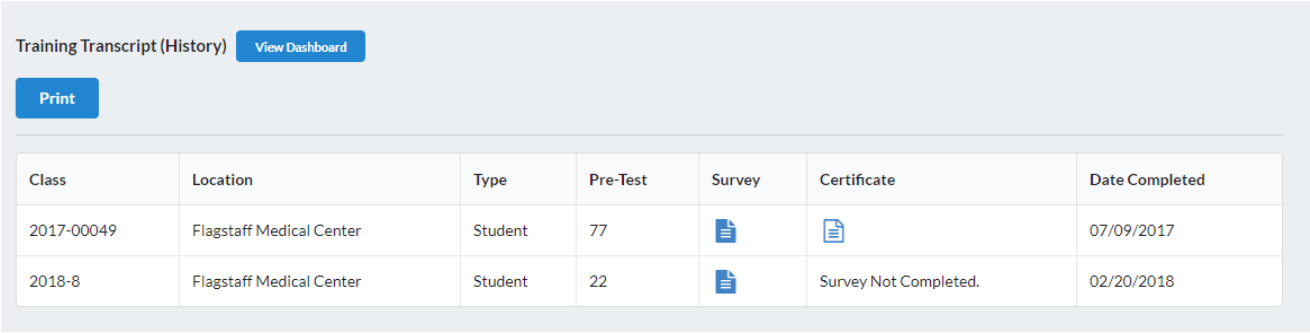

Figure 19 - The Student Home Page

View Dashboard **[Administration]** – The View Dashboard button takes the user to the Class Management Dashboard for users with high enough security access. The button is not visible to standard users. The button is located in the upper left corner of the Application Workspace.

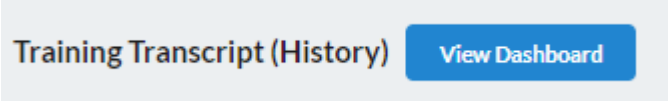

Figure 20 - The View Dashboard Button

Print Transcript – The Print Transcript Button allows the User to print their training transcript. The button is located in the upper left corner of the Application Workspace.

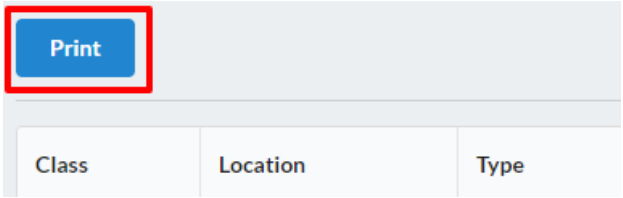

Figure 21 - The Print Transcript Button

Survey – Clicking on the icon in the Survey column of a training record will take the user to a survey for that class. Before training in that class can be finalized, a user must finish the survey.

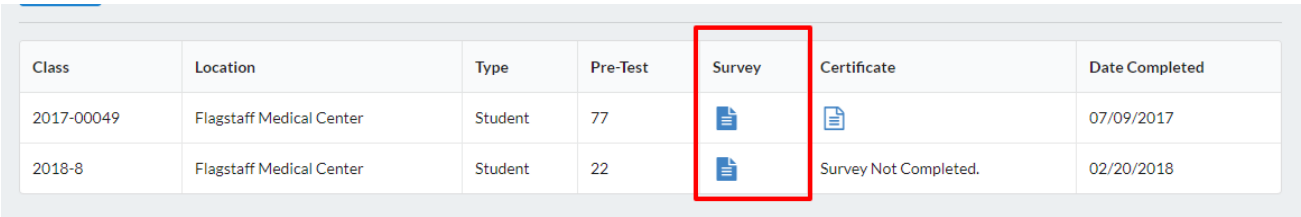

Figure 22 - The Survey column and Icon

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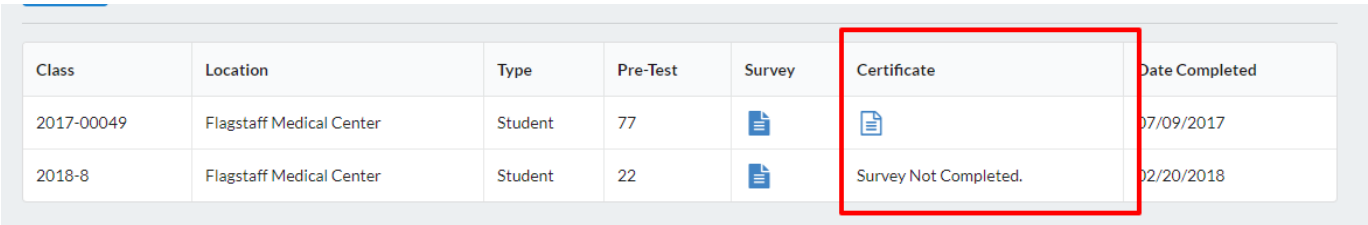
Certificate – Clicking the icon in the Certificate column will take the user to the Certificate page where the user can then print out a completion certificate for the class. If the user has not completed the survey for the class, the Certificate icon will not appear for that class.

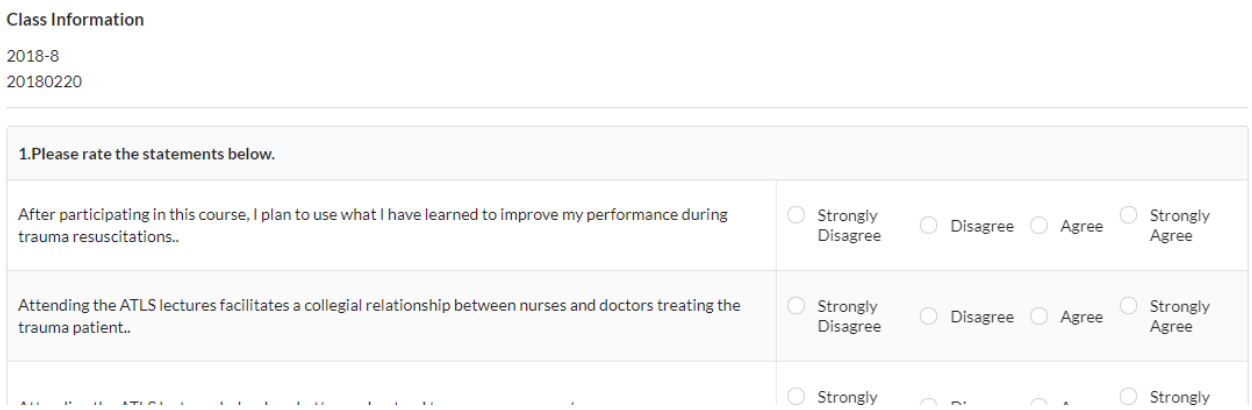


Class	Location	Type	Pre-Test	Survey	Certificate	Date Completed
2017-00049	Flagstaff Medical Center	Student	77			07/09/2017
2018-8	Flagstaff Medical Center	Student	22		Survey Not Completed.	02/20/2018

Figure 23 - The Certificate column and icon

Survey

The survey screen presents a survey for a user that has completed a previous training class to fill out in order to get their certificate of completion.



Class Information

2018-8
20180220

1.Please rate the statements below.				
After participating in this course, I plan to use what I have learned to improve my performance during trauma resuscitations..	Strongly Disagree	Disagree	Agree	Strongly Agree
Attending the ATLS lectures facilitates a collegial relationship between nurses and doctors treating the trauma patient..	Strongly Disagree	Disagree	Agree	Strongly Agree

Figure 24 - A piece of the Survey Screen

Questions – the questions can be true or false and multiple choice. Each question has a rating that the user can select their own personal rating related to the question.

Comment Questions – Some questions leave an open-ended comment field for the user to describe their experience related to the question. Comment Questions are not required fields, but the administrators do appreciate filling out as much information as possible when completing a survey for a class.

Complete Evaluation Button – When the user clicks this button the survey is marked as completed and the user is returned to the Student Home Page (Training Transcript). The button is located at the bottom of the survey along with a message for all users who fill it out.

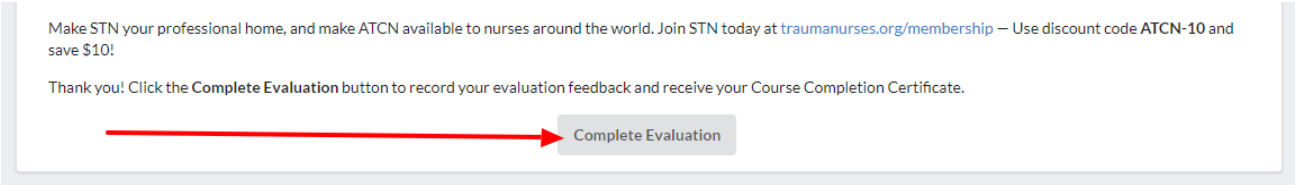


Figure 25 - The Complete Evaluation Button

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Certificate

The survey screen presents a survey for a user that has completed a previous training class to fill out in order to get their certificate of completion. This screen can only be reached after the user has completed the survey related to the class.

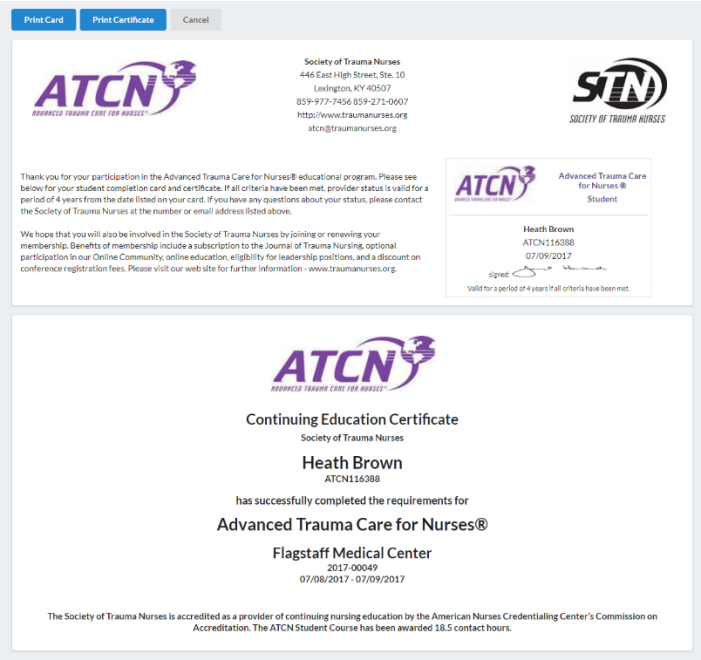

Figure 26 - Certificate Screen

Actions: - **Print Card, Print Certificate –** The buttons that control which object from the screen will be printed are located in the upper left of the Application Workspace.

- ***Print Card*** – Clicking this button will print the ID Card.
- ***Print Certificate*** – Clicking this button will print the Certificate.
- ***Cancel*** – Returns the user to the Student Home/Training Transcript screen.

Figure 27- Certificate Screen Button Actions

Certificates will be saved until the user's training expires. Once the user retakes the class they will be able to print a new certificate for the class. A user can print as many copies of the ID Card and Certificate that they need and can return at any time if they lose them.

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Administrator, Director, or Instructor Dashboard [Administration]

This is the main screen for users with access above standard User-level. There are two sections on this screen. The main task of this page is to display the *Class Workflow* for the currently logged in user who is assumed to be either an Administrator, Director, or Instructor.

The second section is called *Pending Classes*. This section lists all pending classes for the current user and the currently selected Organization.

View Transcript Button – The View Transcript button takes the current user to the User Home Page also known as the Student Transcript. This feature allows users with administrative access to view their own training history in the system. The button is located in the upper left corner of the Application Workspace.

Figure 28 - View Transcript Button

Class Workflow Section – The card view displays at the top of the Application Workspace of the Dashboard. It is designed to show the current user the workflow of classes for the current organization they have selected. Each class is represented by a card in this view. Each card has different status stages before the class has reached its conclusion and is closed. As a stage is finished, it is crossed out (see Class Stages below and Figure 29).

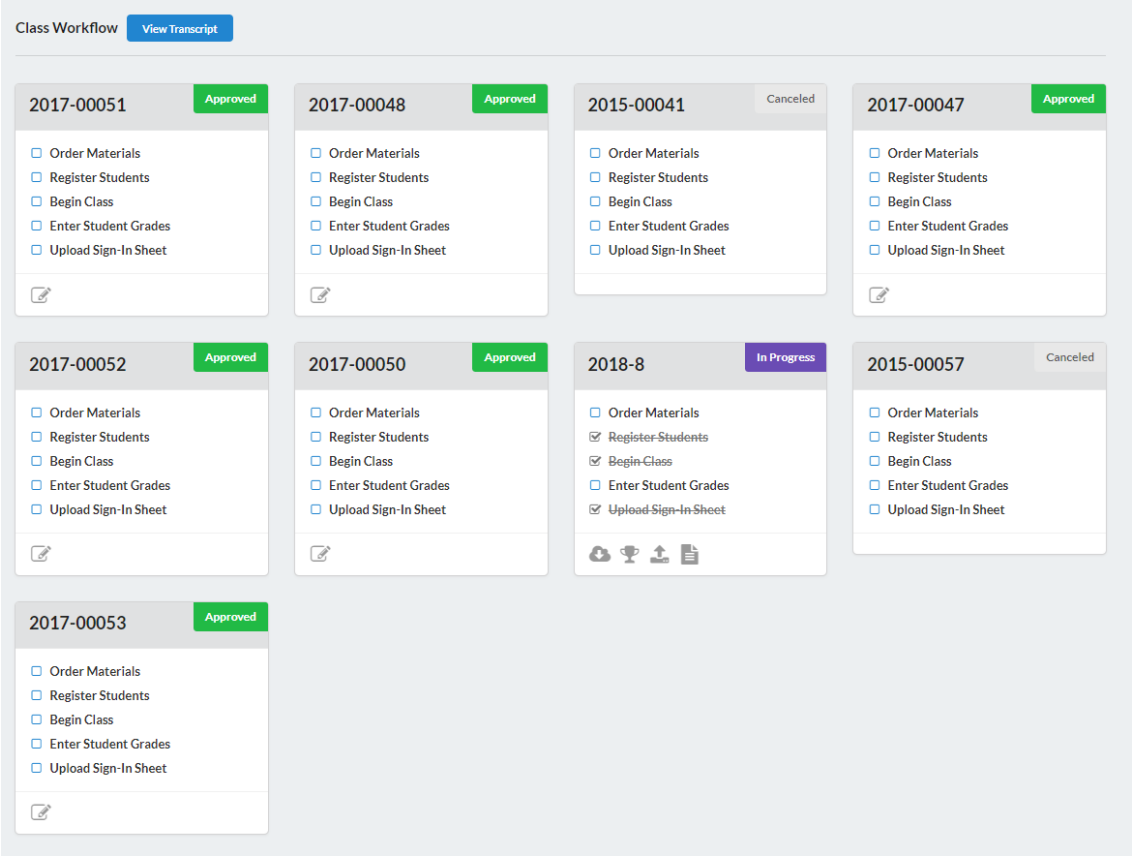

Figure 28 - The Class Workflow section of the Dashboard screen

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Class Stages (Class Workflow) – Each Class Card has five stages before the class is complete and closed (removed from the Class Workflow). As a stage is completed, it is crossed out (see Figure 30 Below). As certain stages are completed more ***Actions*** (see below) will appear for the class.

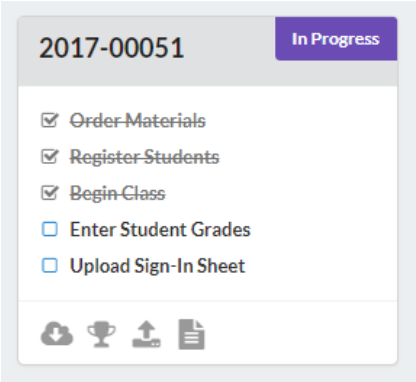

Figure 29 - Class Stages in Class Workflow

Actions (icons) – As the class reaches certain status phases, certain icons will appear or disappear in the classes' Action Icon area. These features are also covered in more detail later in this document. These are:

Icon	Name	Description
	Edit Class	Clicking the Edit Class button located in the bottom left of each card will take the user to the Edit Class screen for the class. After a class is edited, the Class Workflow will be updated if the class has had details changed.
	Download Sign-in Sheet	Takes the user to the Sign-in Sheet Screen for the class. The Sign-in Sheet can be printed.
	Grade Class	Takes the user to the Grading Screen for the class.
	Upload Sign-in Sheet	Takes the user to the Upload Sign-in Sheet screen.
	Send Pre-test	Allows the user to send the Pre-test to all Registered Students of the Class.

Pending Classes Section – This section shows the user which classes are still pending (a status used before a class is displayed in the workflow). After a class is Approved, it will move into the Class Workflow. The only Action Icon for this section is the Edit Class icon, which functions the same as the icon in the Class Workflow (shown in the table above).

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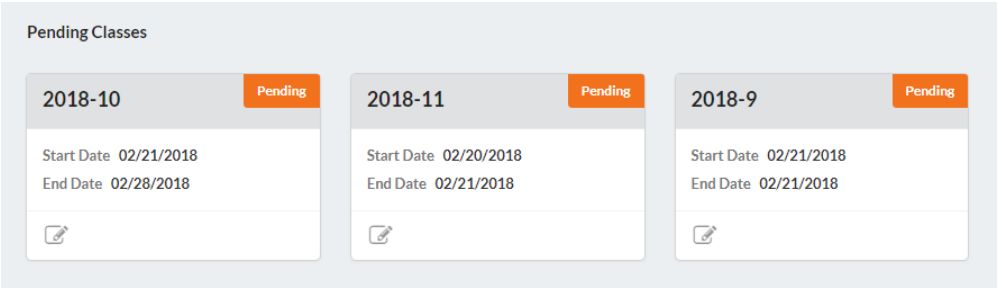

Figure 30 - The Pending Classes Section of the Dashboard

Classes [Administration]

The Classes screen is a Card View designed for users to manage the class schedule and tasks involved in the training effort of each class. Icons appear and disappear depending on the status of a class. Some icons are available only to the highest level of administration.

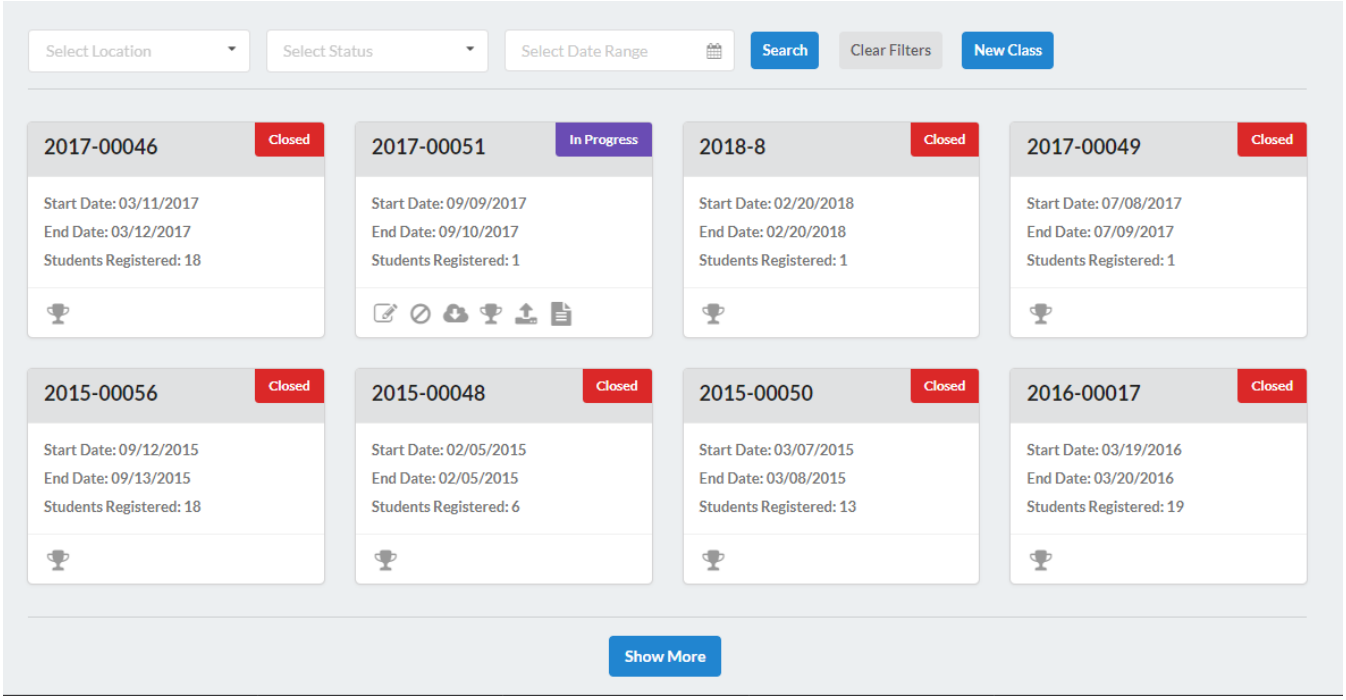

Figure 31- The Classes Card View

Class Filters – There are three different filters designed to speed up working with class lists that are large. Use the filters to trim down the number of cards until finding the specific classes to manage. For more information about filters see the ***Filters*** section of this document.

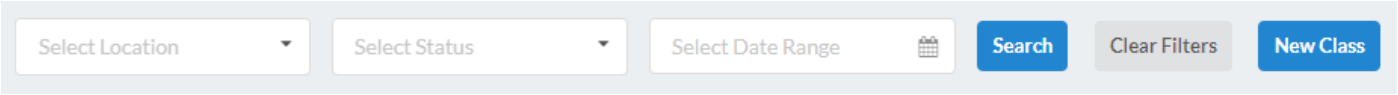

Figure 32 - The Class screen available Filters

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Class Filters	
Name	**Description**
Location Filter	Type the location name or use the dropdown to search for locations.
Status Filter	Select the status of classes to filter the card view by.
Date Range Filter	Select the To and From dates to search a date range of classes.

New Class Button – Located on the right side of the filters, this button will take the user to the screen that allows them to create a completely new class on the schedule.

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Actions (icons) – As the class reaches certain status phases, certain icons will appear or disappear in the classes' Action Icon area (at the bottom of each card). These features are also covered in more detail later in this document. These are:

Icon	Name	Description
	Edit Class	Clicking the Edit Class button located in the bottom left of each card will take the user to the Edit Class screen for the class. After a class is edited, the Class Workflow will be updated if the class has had details changed.
	Download Sign-in Sheet	Takes the user to the Sign-in Sheet Screen for the class. The Sign-in Sheet can be printed.
	Grade Class	Takes the user to the Grading Screen for the class.
	Upload Sign-in Sheet	Takes the user to the Upload Sign-in Sheet screen.
	Send Pre-test	Allows the user to send the Pre-test to all Registered Students of the Class.

Show More Button – Located on the bottom of the Class Card View, this button will load more cards if there is more data available that hasn't displayed. Each press of the Show More Button will load another 8 Cards.

New Class [Administration]

This screen allows the user to create a new class on the schedule. Complete the form to create the class. All fields must be completed to create the new class.

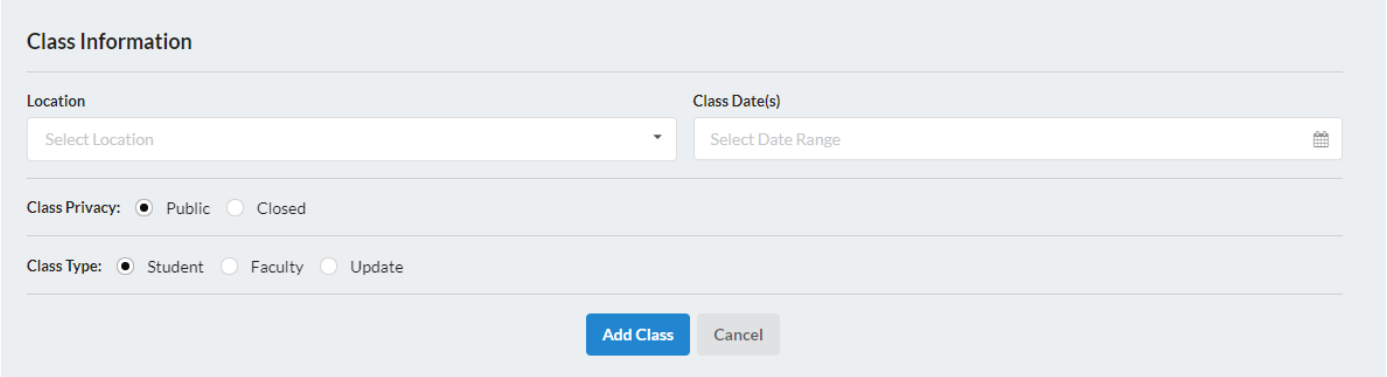
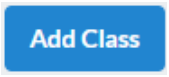
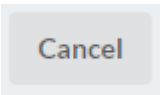


Figure 33 - New Class Screen



Add Class Button – Located on the bottom of the New Class Screen, this button will add the new class to the database (save).



Cancel Button – This button will return the user to the Classes screen.

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Edit Class [Administration]

This screen allows the user to edit the details of the class as well as add and remove students and faculty.

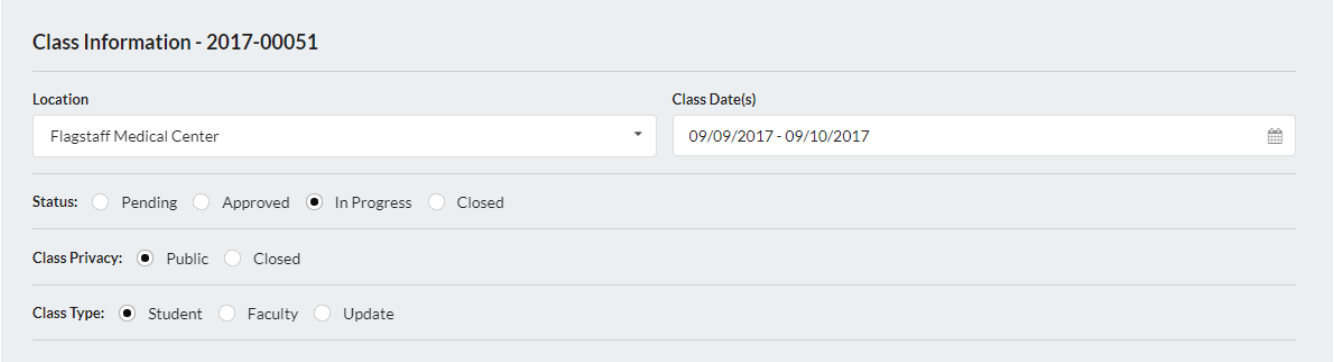

Figure 34 - Edit Class Screen (Details)

All fields will have information selected already. The user can change the details by selecting new settings for the class and changing the field data.

Attendee Management – This section of the screen allows the user to add and remove students to the class roster. The user can search by first name, last name, or ATCN ID. Please refer to the ***Filters*** section on how to use filers for searching.

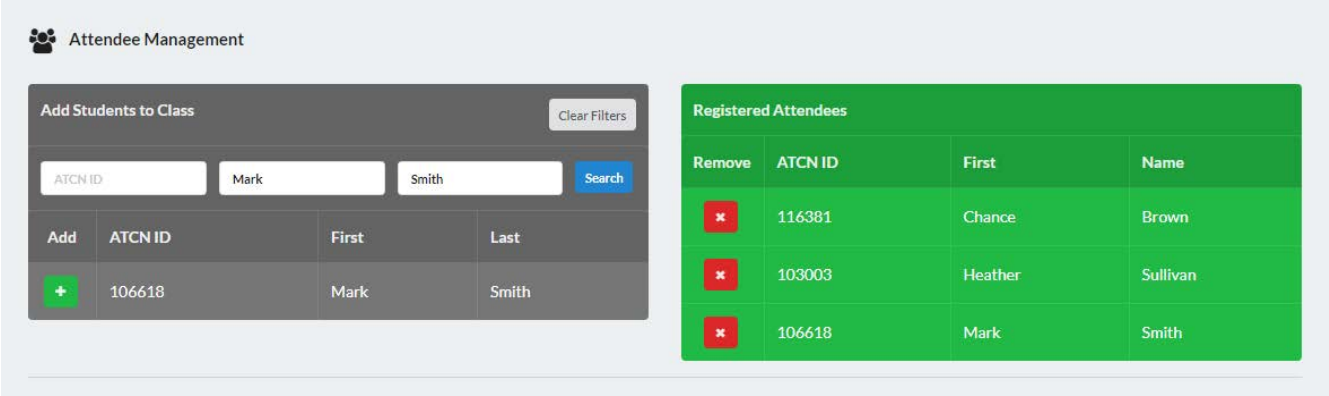

Figure 35 - Attendee Management Section of the Edit Class Screen

The left table (Add Students to Class) in dark grey shows students to add to the class after a search has been made. The right table in green (Registered Attendees) shows students who have been added to the class roster already.

Clicking the Plus Icon in the Add Students to Class table will add the student from that table row to the class.

Clicking the Delete Icon in the Registered Attendees table will remove the student from class.

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Faculty Management – This section of the screen allows the user to add and remove Faculty to the class roster. The user can search by first name, last name, or ATCN ID. Please refer to the ***Filters*** section on how to use filers for searching.

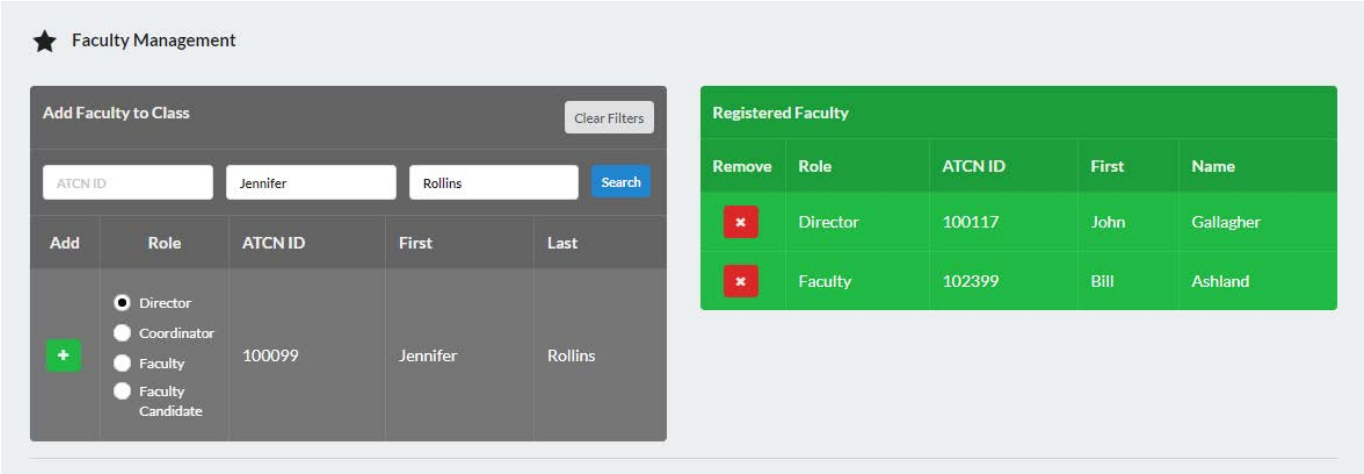

Figure 36 - Faculty Management Section on the Edit Class Screen

The left table (Add Faculty to Class) in dark grey shows Faculty to add to the class after a search has been made. The right table in green (Registered Attendees) shows Faculty who have been added to the class roster already.

Clicking the Plus Icon in the Add Faculty to Class table will add the Faculty from that table row to the class.

Clicking the Delete Icon in the Registered Faculty table will remove the Faculty from class.

Each Faculty added must have a Role selected. The choices are Director, Coordinator, Faculty, and Faculty Candidate. The user should be sure to select the correct role for the Faculty member they are adding to the class before adding them.

Actions: Save or Cancel – If the user clicks the save button all changes to the class will be saved. Clicking the cancel button returns the user to the main Class screen.

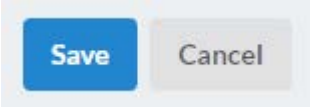

Figure 37 - Edit Class Save or Cancel Buttons

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Download Sign-in Sheet [Administration]

This screen allows the user to print the sign-in sheet for the class. Once filled out, it can be scanned in the uploaded back to the system.

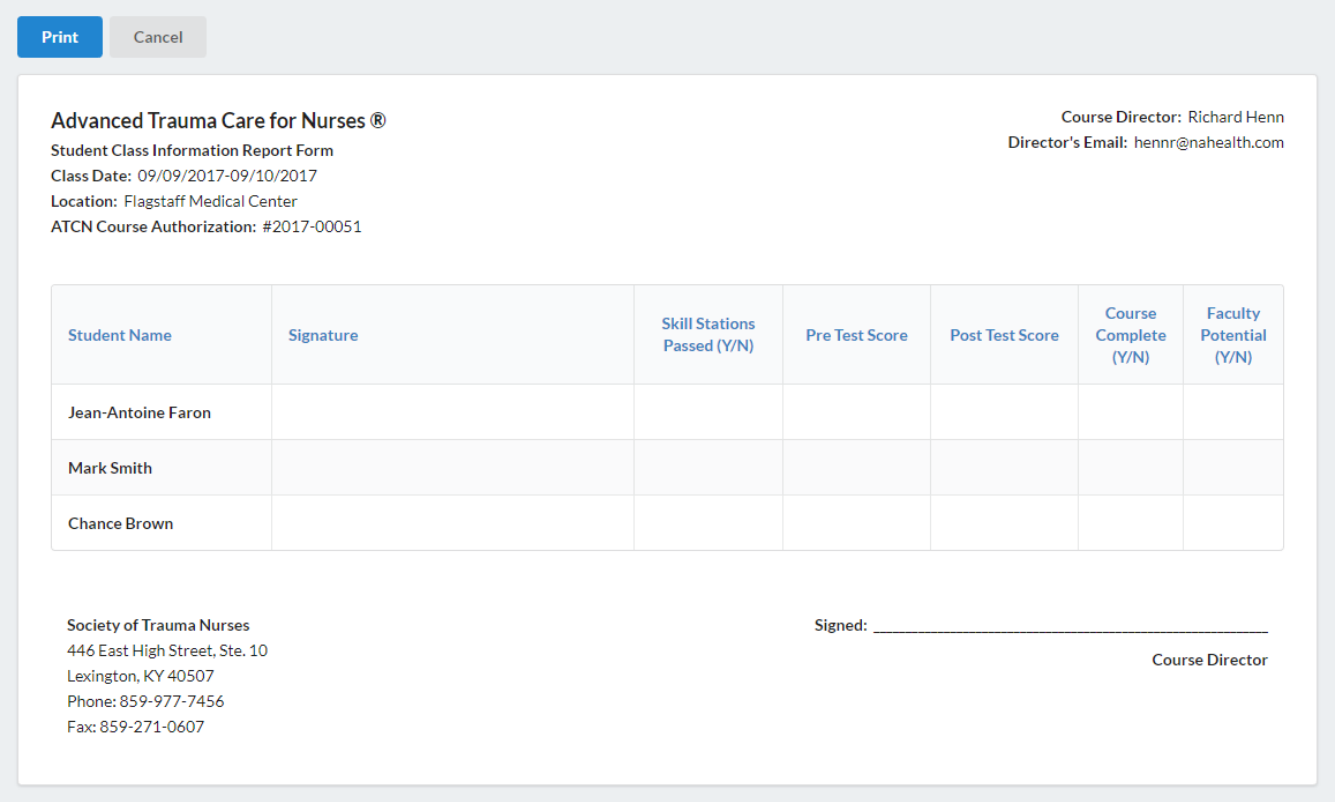

Figure 38 - Download Sign-in Sheet

Actions: - **Print, Cancel –** The buttons that control which object from the screen will be printed are located in the upper left of the Application Workspace.

- ***Print*** – Clicking this button will print the Sign-in Sheet.
- ***Cancel*** – Returns the user to the Classes screen.

Grade Class [Administration]

This screen allows the user to grade each student's class performance. The user can select Class Status (Pass, Fail, No Show) as well as other specifics related to the student's performance in the class.

- ***Update*** – Clicking this button will update the grade and performance details for the student. Each student has their own update button.
- ***Resend Email*** – Clicking this button will resend the class registration email to the student. Each student has their own Resent Email Button.

Figure 39 - Grade Class Buttons

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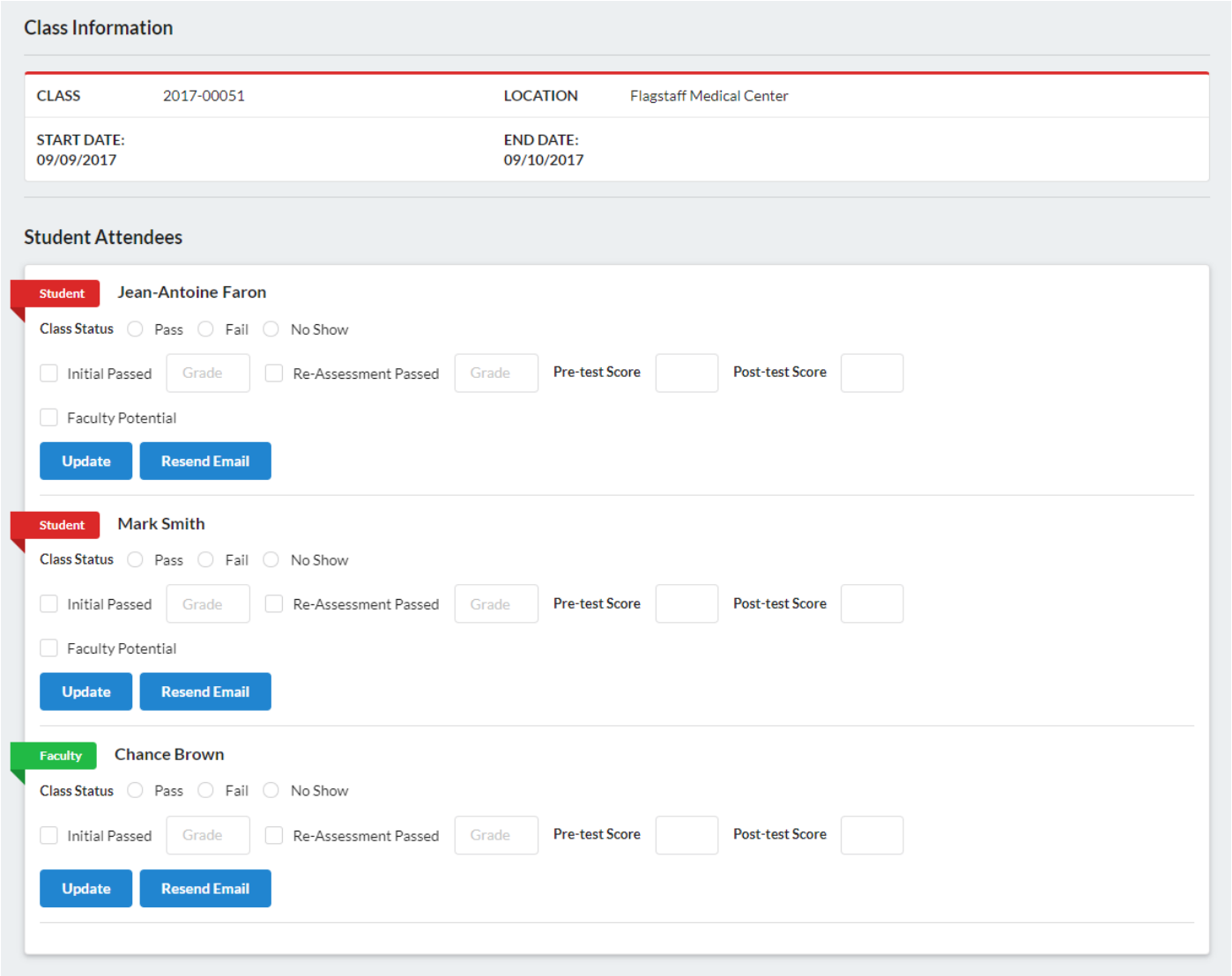

Figure 40 - Grade Class Screen

Upload Sign-in Sheet [Administration]

This screen allows the user to upload a scanned sign-in sheet for the class. The document should be a JPG, PNG, PDF, or DOCX file. Other file types are not allowed.

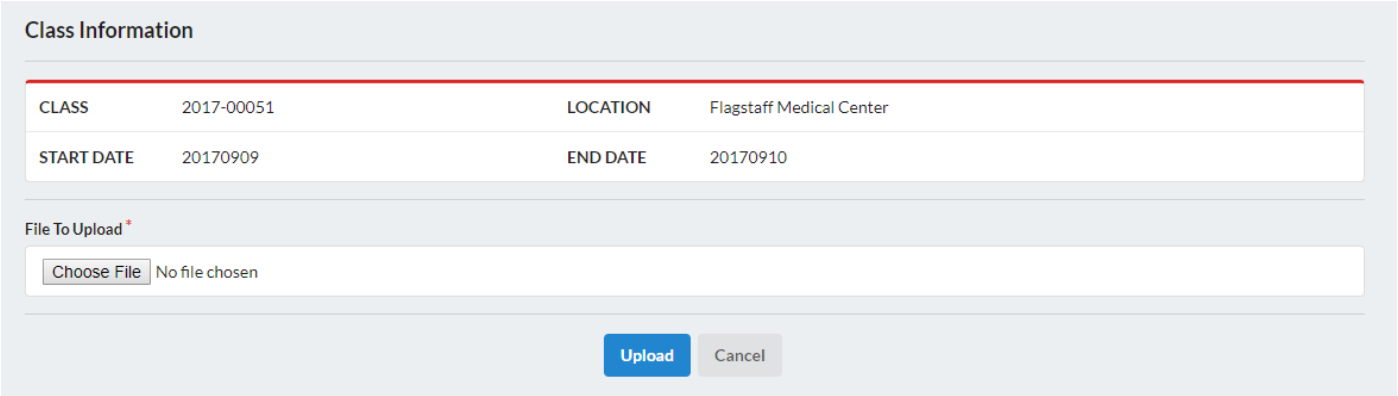

Figure 41 - The Upload Sign-in Sheet Screen

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Choose File – Clicking the Choose File button will open a file dialog window. The user must find and select a file from their system to upload as the sign-in sheet.

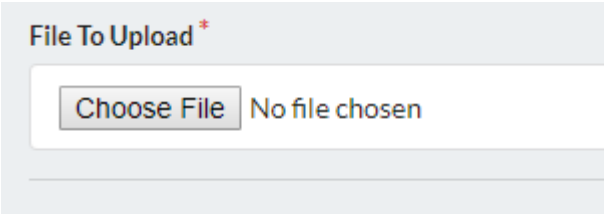

Figure 42 - Choose File from the Upload Sign-in Sheet Screen

- ***Upload*** – Clicking this button will begin the sign-in sheet upload. A status message will appear in the upper right corner of the screen when the file has finished uploading.
- ***Cancel*** – Returns the user to the Class Screen.

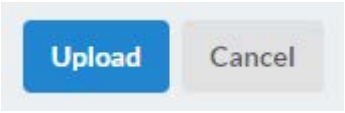

Figure 43 - The Upload and Cancel Buttons from the Upload Sign-in Sheet Screen

Documents

This screen allows users to find and download documents from the application.

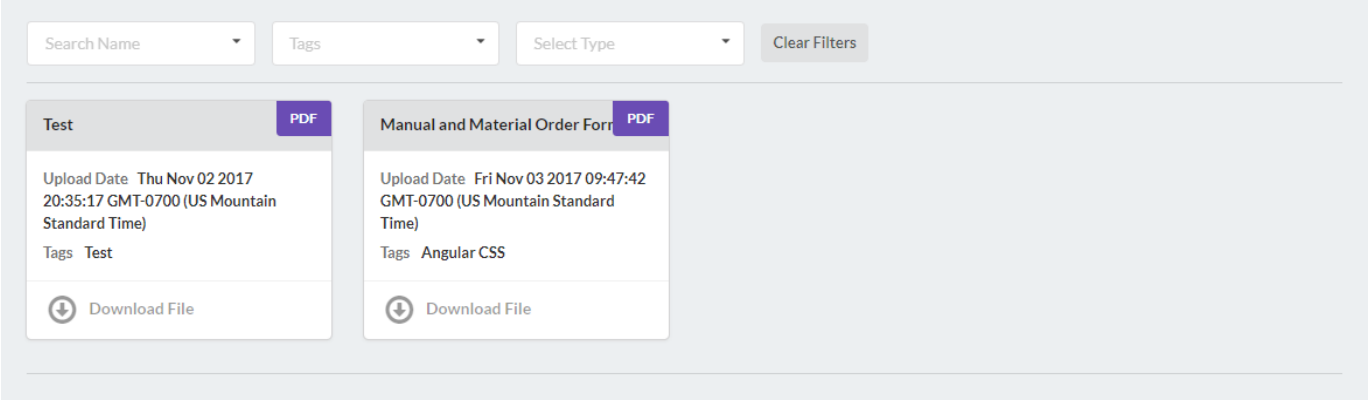

Figure 44 - The Documents Screen

Document Filters – There are three different filters designed to speed up working with document lists that are large. Use the filters to trim down the number of cards until finding the specific documents to manage. For more information about filters see the ***Filters*** section of this document.

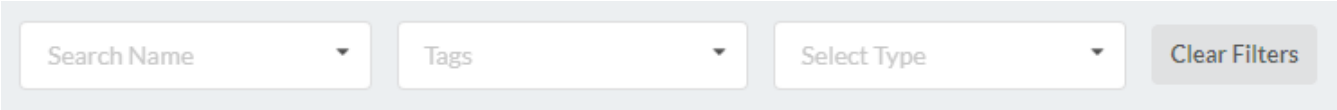

Figure 45 - The Documents Screen available filters

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Document Filters	
Name	**Description**
Name	Type the name of the document to search for. The search can find a file by a partial name as well.
Tags	Click the dropdown to find tags (categories) to search for, or type a tag into the tag filter.
Type	Select the type of file from this filter (Excel, Word, PDF, etc..)

Download File – This button icon is located at the bottom of each document card. Clicking the button will open a file dialog. Be sure to save the document to a location on your computer that you can find it later.

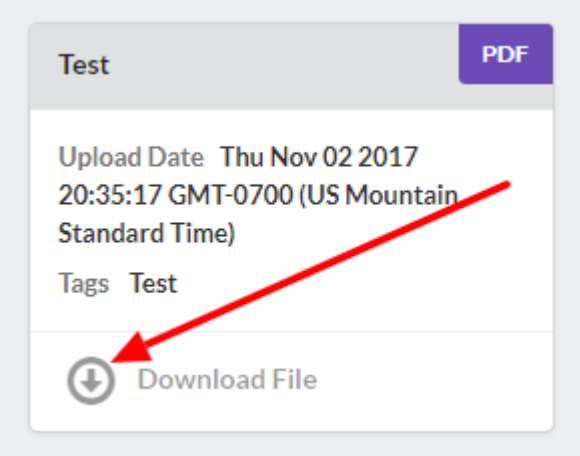

Figure 46 - Document File Download Button located on each document card

People

This screen allows users to find People (Users) within the application and view the person's details.

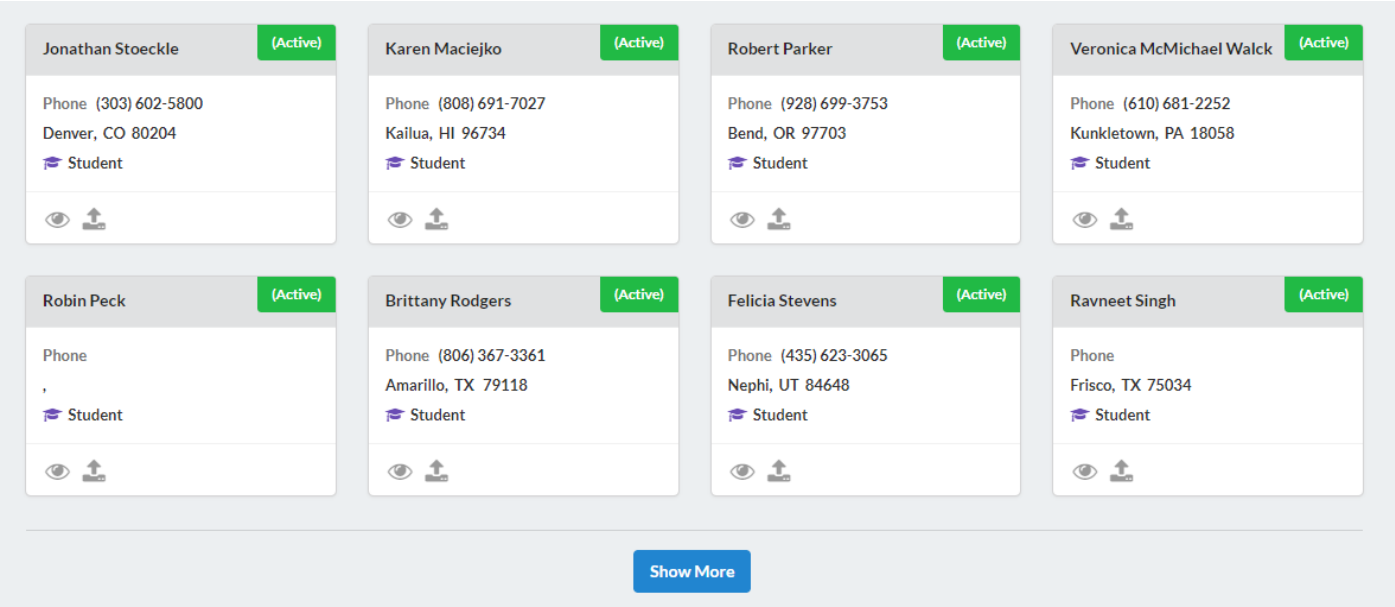

Figure 47- The People Screen

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People Filters – There are three different filters designed to speed up working with People lists that are large. Use the filters to trim down the number of cards until finding the specific People to manage. For more information about filters see the ***Filters*** section of this document.

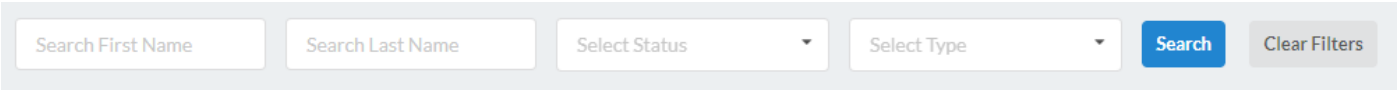

Figure 48 - The Filters available on the People Screen

People Filters	
Name	**Description**
First Name	Type the first name of the person to search for. The search can find a file by a partial name as well.
Last Name	Type the last name of the person to search for. The search can find a file by a partial name as well.
Status	Select the person's status you are looking for. An Active user is still available to do training in the system. An Inactive user no longer uses the system but their records are still maintained.
Type	Select the type of person you are looking for. These types are based on the user's security level.

Person Card – A Person card contains a little detail about each person using the Card View list type.

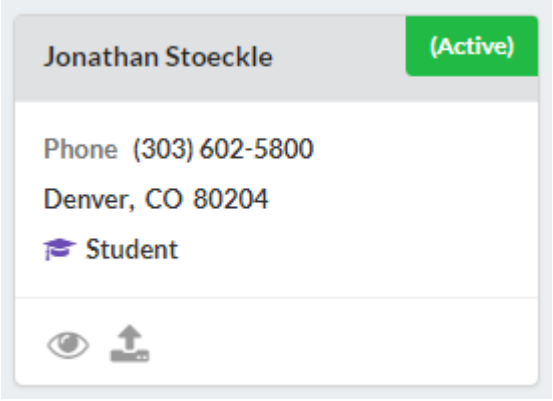

Figure 49 - The Person Card on the People Page

Actions (icons) – There are two actions available to work with people on each Person Card located in the Action Icon area (at the bottom of each card). These are:

Icon	Name	Description
	View Person	Takes the user to the Personal Details Screen.
	Upload Critique	Takes the user to the Upload Critique Screen, which allows users to upload critiques about the user in order to identify them for possible Faculty Candidate placement.

Show More Button – Located on the bottom of the People Card View, this button will load more cards if there is more data available that hasn't displayed. Each press of the Show More Button will load another 8 Cards.

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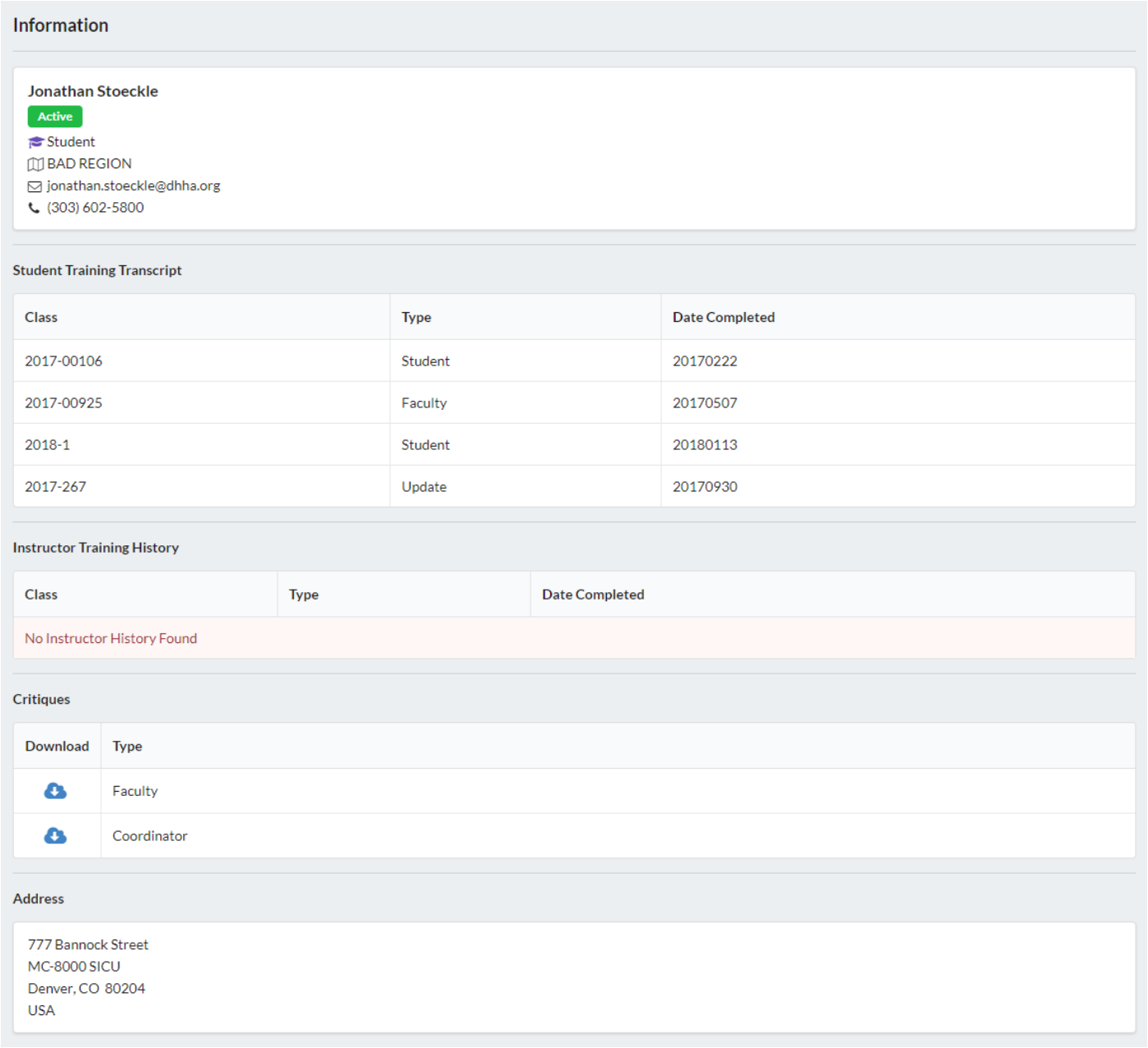
View Person

This screen displays detail about a person. Including their system status, phone, and email. The student's training transcript can also be seen as well as their instructor training history if they are an instructor. Finally, if the user has had any critiques uploaded to their record, it will be displayed here.



Information

Jonathan Stoeckle
Active
Student
BAD REGION
jonathan.stoeckle@dhha.org
(303) 602-5800

Student Training Transcript

Class	Type	Date Completed
2017-00106	Student	20170222
2017-00925	Faculty	20170507
2018-1	Student	20180113
2017-267	Update	20170930

Instructor Training History

Class	Type	Date Completed
No Instructor History Found		

Critiques

Download	Type
	Faculty
	Coordinator

Address

777 Bannock Street
MC-8000 SICU
Denver, CO 80204
USA

Download Critique Button – Located in the Critiques section near the bottom of the screen, users can download any critiques that have been added to this person's record. Click the Download icon ( ) to download a critique.

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Upload Critique

This screen allows the user to upload a scanned critique for the person. The document should be a JPG, PNG, PDF, or DOCX file. Other file types are not allowed.

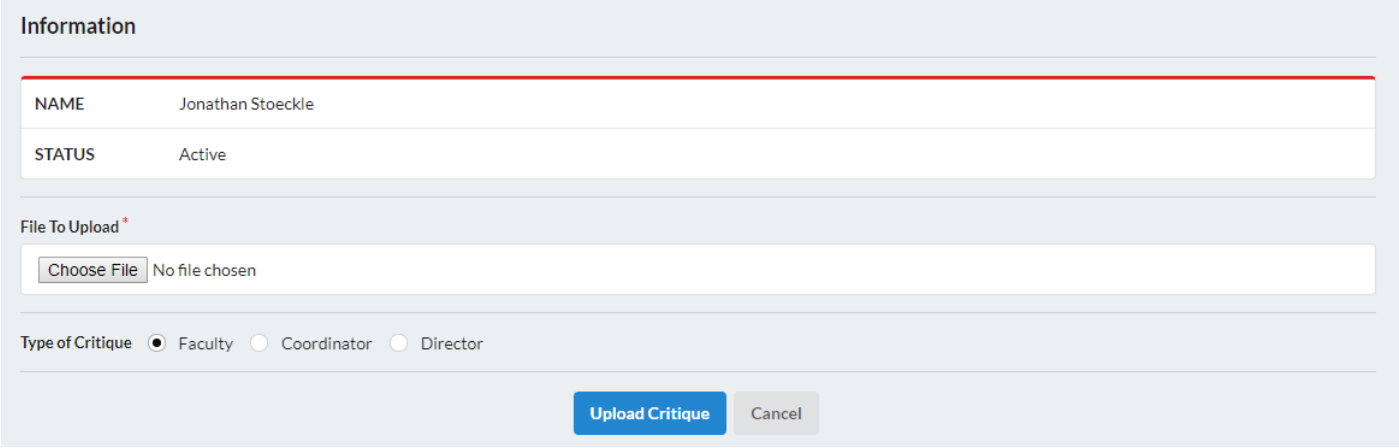

Figure 50 - The Upload Critique Screen

Choose File – Clicking the Choose File button will open a file dialog window. The user must find and select a file from their system to upload as the sign-in sheet.

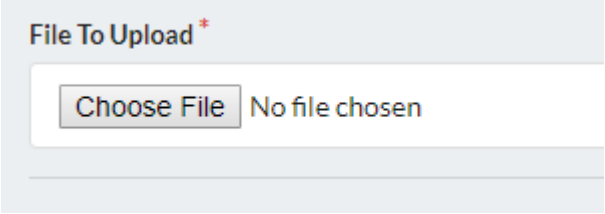

Figure 51 - Choose File Button on the Upload Critique Screen

- ***Upload*** – Clicking this button will begin the critique upload. A status message will appear in the upper right corner of the screen when the file has finished uploading.
- ***Cancel*** – Returns the user to the People Screen.

Figure 52 - Upload Critique and Cancel Buttons

Orders (Orders Management)

This screen displays a card view list of the orders currently in the system. It also allows the user to create a new order, edit an order, or pay an order.

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Orders Filters – There are three different filters designed to speed up working with orders lists that are large. Use the filters to trim down the number of cards until finding the specific orders to manage. For more information about filters see the ***Filters*** section of this document.

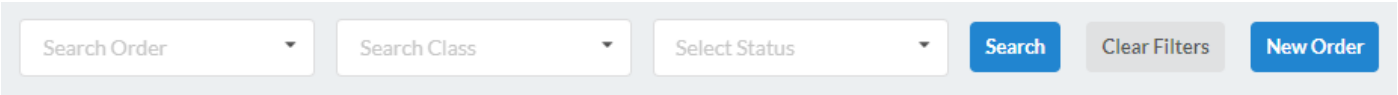

Figure 53 - The Orders Screen Filters

Class Filters	
Name	**Description**
Order ID Filter	Type the Order ID or select from a dropdown list of Order IDs.
Class ID Filter	Type the Class ID or select from a dropdown of class IDs.
Status	Select the status of the orders you wish to filter by from a dropdown.

New Order Button – Located on the right side of the filters, this button will take the user to the screen that allows them to create a completely new order for classroom materials.

Orders Card View – This section of the screen displays a list of orders in the card view format.

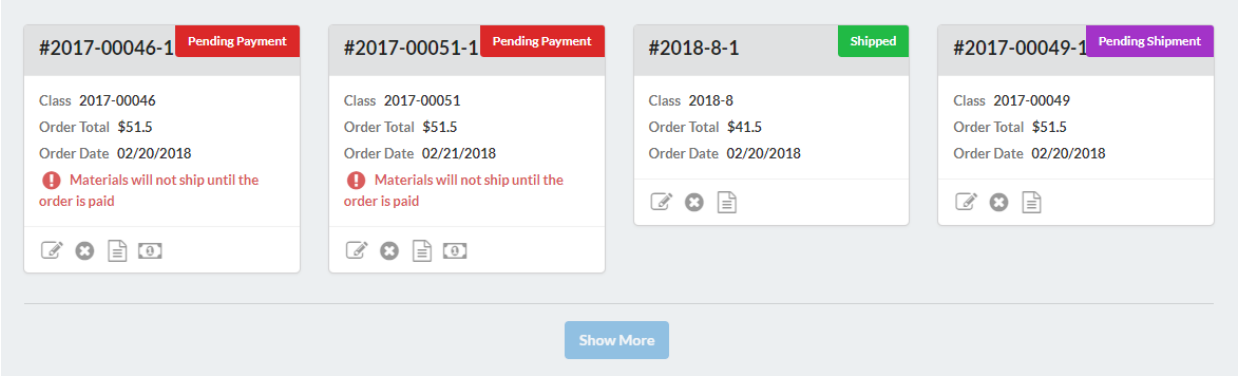

Figure 54 - The Orders Screen Card View

Actions (icons) – As the order reaches certain status phases, certain icons will appear or disappear in the order's Action Icon area (at the bottom of each card). These features are also covered in more detail later in this document. These are:

Icon	Name	Description
	Edit Order	Clicking this button will take the user to the order's edit details screen.
	Delete Order	The Delete Order button is only available to high level administrators and will delete an order from the system.
	Order Summary	Takes the user to the Order Summary screen.
	Pay Order	Takes the user to the Pay Order screen (which will open a connection to Paypal for payment).

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Show More Button – Located on the bottom of the Order Card View, this button will load more cards if there is more data available that hasn't displayed. Each press of the Show More Button will load another 8 Cards.

New Order

This screen allows the user to create a new order for classroom materials. Complete the form to create the order. All fields must be completed to create the new order.

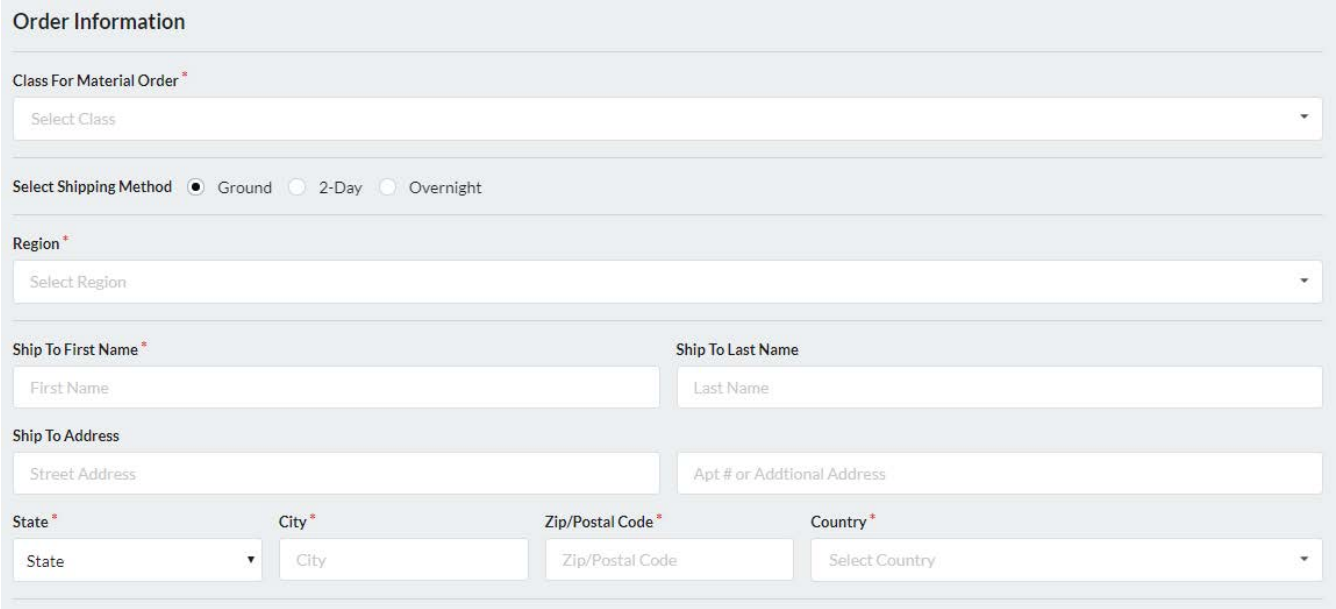

Figure 55 - Order Details from the New Order Screen

Materials Needed – This section of the screen allows the user to add and remove classroom materials to the order. The total cost of materials is displayed in the bottom row of the materials needed table (to the right of the text "Total for Materials")

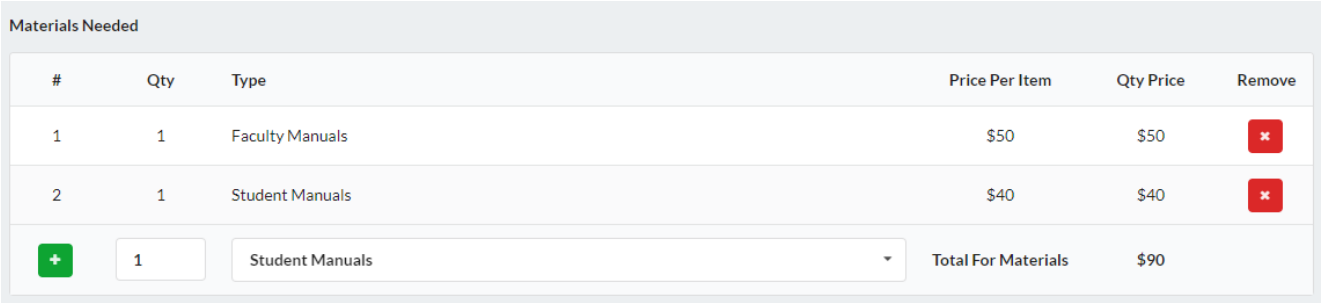

Figure 56 - Materials needed section of the New Order Screen

Qty Box and Type Dropdown – Use the Type Dropdown (explained below) to select which type of material to order. Then select a quantity by typing the number in the Qty Box (explained below). After this, click the Add button ( ) to add that type and quantity to the classroom materials order.

Figure 57 - Qty Box and Type Dropdown

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Remove Button – The Remove Button ( ) will remove classroom materials from the order if the user has decided not to add them to this order. When items are removed all calculations on the orders are recalculated based on the removed items and what remains in the order.

Invoice Totals – This section of the screen displays the invoice totals with shipping (calculated automatically based on several factors from the details section of the order).

Invoice Total	
Shipping	$0.00
Materials	$90
Total Order	**$90.00**

Figure 58 - Invoice Totals Section from the New Order Screen

Submit Order

Submit Order Button – Located on the bottom of the New Order Screen, this button will add the new class to the database (save).

Cancel

Cancel Button – This button will return the user to the Orders screen.

Edit Order (Edit Classroom Materials Order)

This screen allows the user to edit the details of the order as well as add and remove materials to the order.

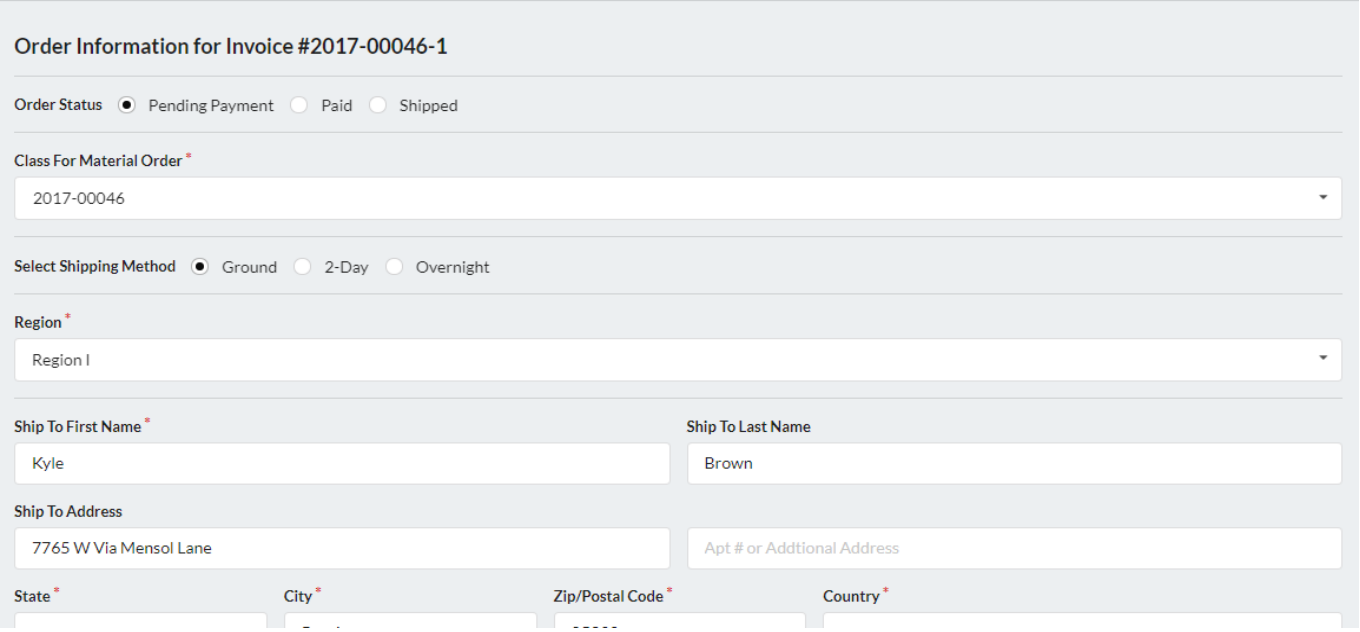

Figure 59 - The Order Details from the Edit Order Screen

All fields will have information selected already. The user can change the details by selecting new settings for the order and changing the field data.

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Materials Needed – This section of the screen allows the user to add and remove classroom materials to the order. The total cost of materials is displayed in the bottom row of the materials needed table (to the right of the text "Total for Materials")

Materials Needed

#	Qty	Type	Price Per Item	Qty Price	Remove
1	1	Faculty Manuals	$50	$50	
2	1	Student Manuals	$40	$40	
+	1	Student Manuals	Total For Materials	$90	

Figure 60 - Materials Needed section from the Edit Order Screen

Qty Box and Type Dropdown – Use the Type Dropdown (explained below) to select which type of material to order.

Then select a quantity by typing the number in the Qty Box (explained below). After this, click the Add button (+) to add that type and quantity to the classroom materials order.

1 Student Manuals

Figure 61 - Qty Box and Type Dropdown

Remove Button – The Remove Button (×) will remove classroom materials from the order if the user has decided not to add them to this order. When items are removed all calculations on the orders are recalculated based on the removed items and what remains in the order.

Invoice Totals – This section of the screen displays the invoice totals with shipping (calculated automatically based on several factors from the details section of the order).

Invoice Total	
Shipping	$0.00
Materials	$90
Total Order	$90.00

Figure 62 - Invoice Totals Section from the Edit Order Screen

Actions: Save or Cancel – If the user clicks the save button all changes to the order will be saved. Clicking the cancel button returns the user to the main Orders screen.

Save Cancel

Figure 63 - Save or Cancel buttons on the Edit Order Screen

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Order Summary

This screen allows the user to print or email (to themselves) an order summary (invoice).

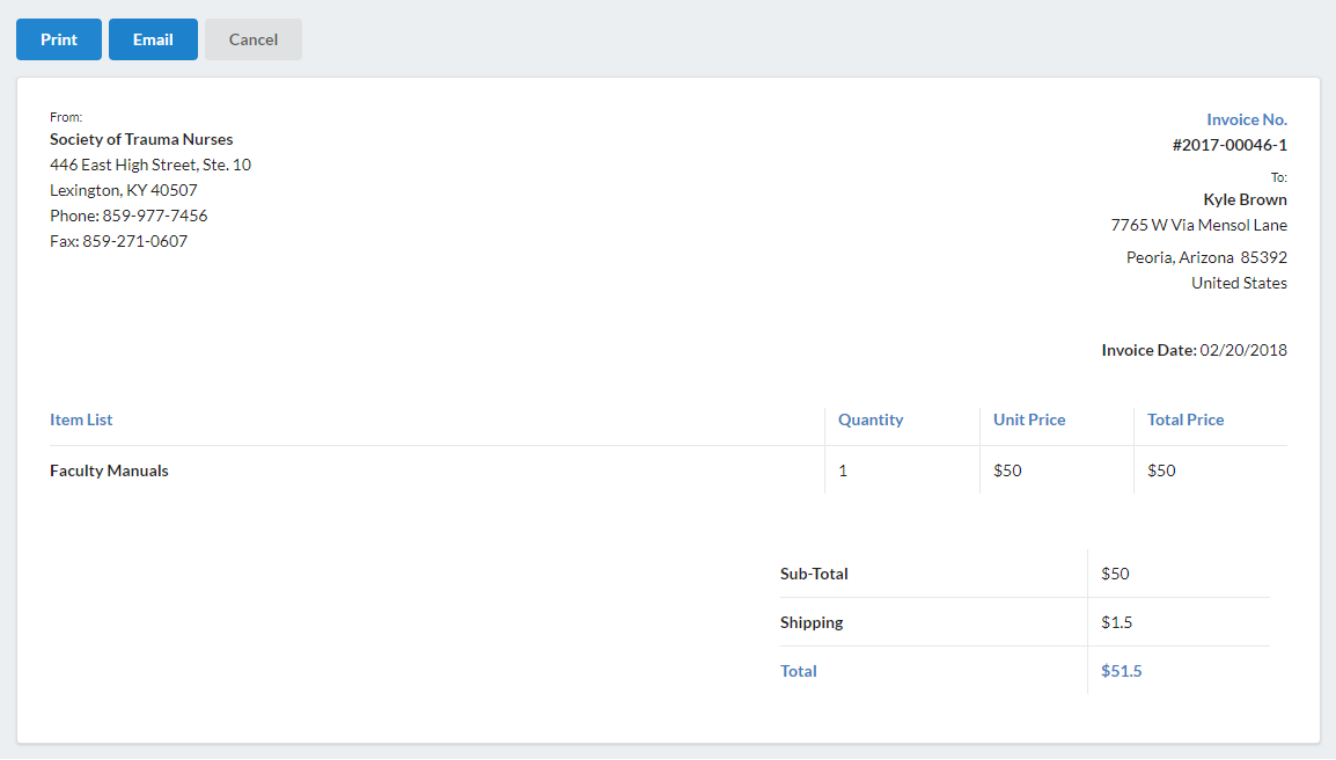

Figure 64 - The Order Summary Screen

Actions: - **Print, Email, or Cancel –** The buttons that control which object from the screen will be printed are located in the upper left of the Application Workspace.

- ***Print*** – Clicking this button will print the Order Summary.
- ***Email*** – This will send the Order Summary to the current user's email address.
- ***Cancel*** – Returns the user to the Orders screen.

Pay Order

If the Pay Order button is clicked the screen will dim and the Pay Order Dialog will appear. Click the link in the dialog box to go to Paypal and pay the order. Once the order is paid, Paypal will return the user to the system and the order will be processed. No materials will be sent before the order is paid.

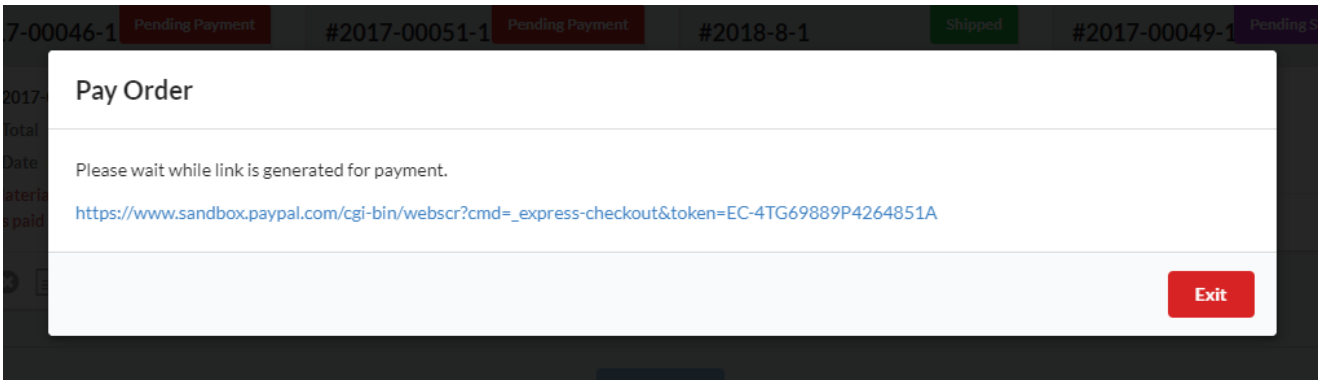

Figure 65 - The Pay Order Dialog Box

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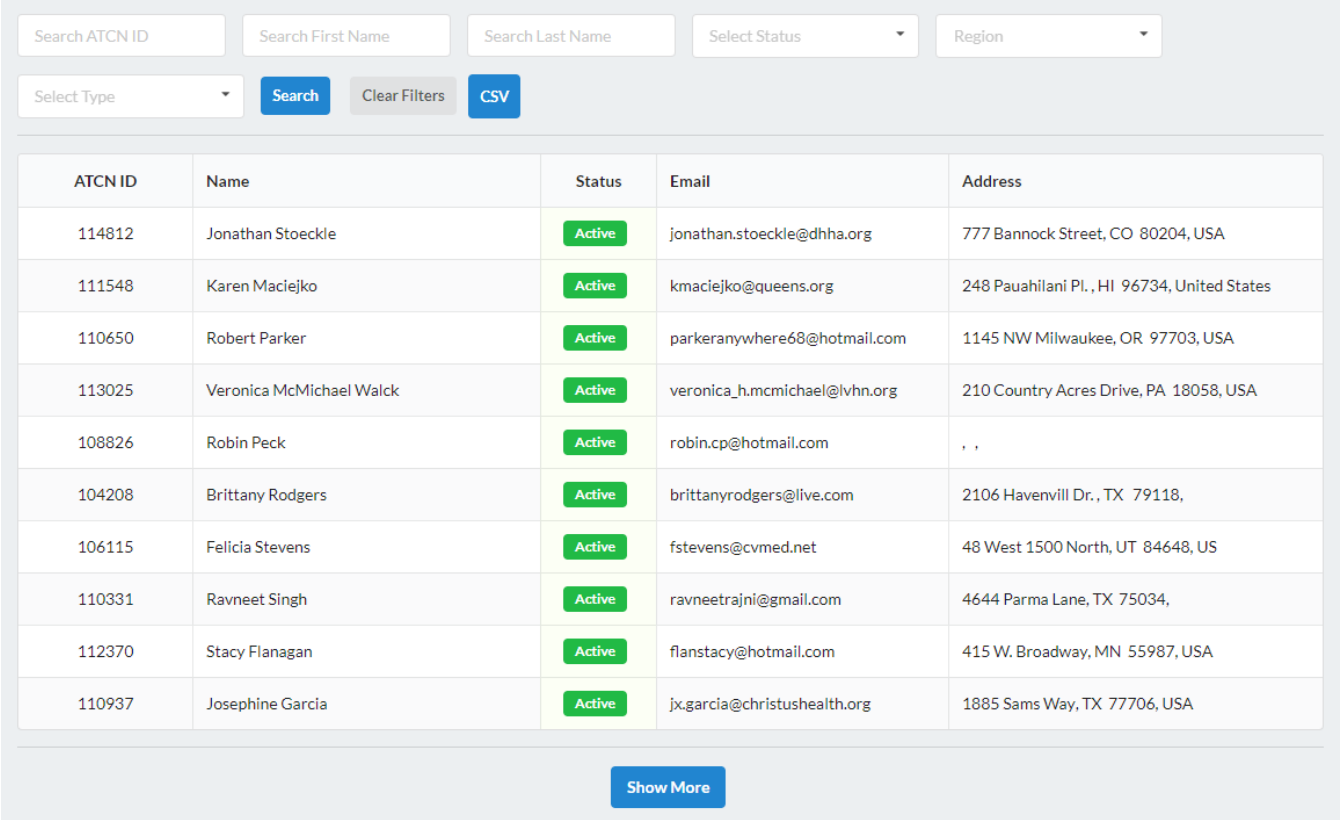
Report – User List

This report displays a list of users from the system. It can be filtered with several filters to find specific lists of users. The report can also be exported to a CSV file, which can then be loaded into Excel.



ATCN ID	Name	Status	Email	Address
114812	Jonathan Stoeckle	Active	jonathan.stoeckle@dhha.org	777 Bannock Street, CO 80204, USA
111548	Karen Maciejko	Active	kmaciejko@queens.org	248 Pauahilani Pl. , HI 96734, United States
110650	Robert Parker	Active	parkeranywhere68@hotmail.com	1145 NW Milwaukee, OR 97703, USA
113025	Veronica McMichael Walck	Active	veronica_h.mcmichael@lvhn.org	210 Country Acres Drive, PA 18058, USA
108826	Robin Peck	Active	robin.cp@hotmail.com	, ,
104208	Brittany Rodgers	Active	brittanyrodgers@live.com	2106 Havenvill Dr. , TX 79118,
106115	Felicia Stevens	Active	fstevens@cvmed.net	48 West 1500 North, UT 84648, US
110331	Ravneet Singh	Active	ravneetrajni@gmail.com	4644 Parma Lane, TX 75034,
112370	Stacy Flanagan	Active	flanstacy@hotmail.com	415 W. Broadway, MN 55987, USA
110937	Josephine Garcia	Active	jx.garcia@christushealth.org	1885 Sams Way, TX 77706, USA

Figure 66 - The User List Report

User List Filters –Use the filters to trim down the number of users until finding the specific list needed. For more information about filters see the ***Filters*** section of this document.

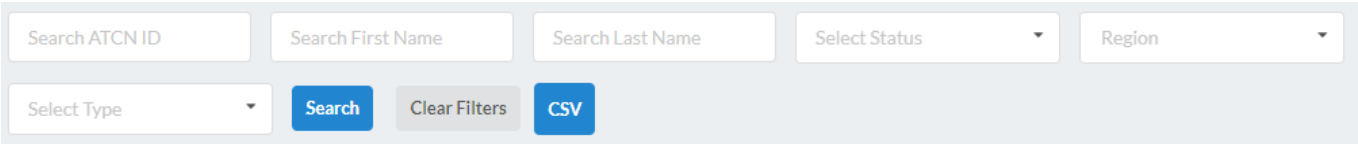


Figure 67 - User List Filters

CSV – Click this button and wait a moment as the CSV file is generated for download.

Show More Button – Located on the bottom of the User List, this button will load more users if there is more data available that hasn't displayed. Each press of the Show More Button will load another 10 Users.

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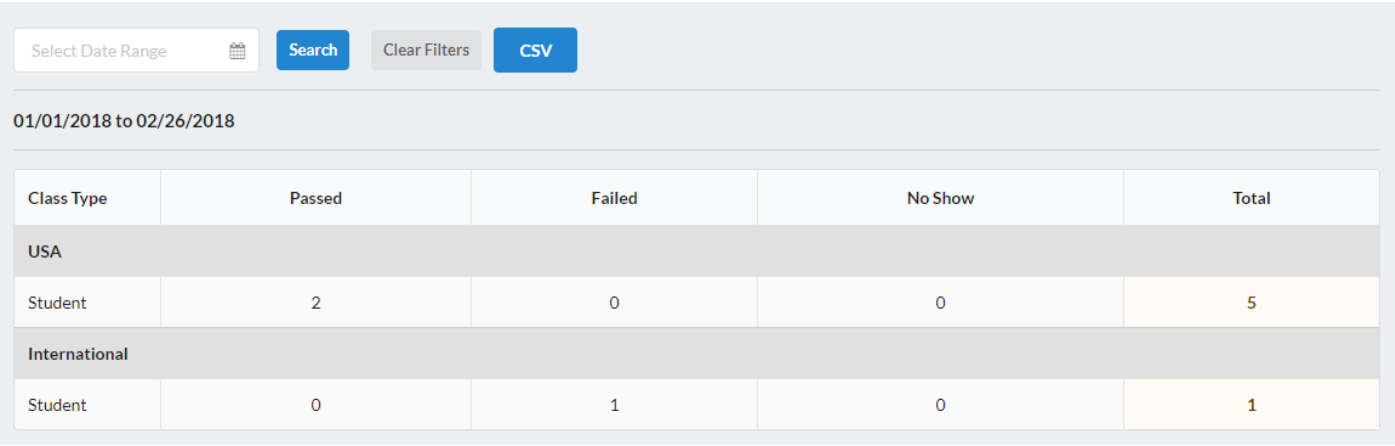
Report – Student Attendance

This report displays statistics related to student attendance of classes. It can be filtered by a Date Range. For more information about filters see the ***Filters*** section of this document.



Class Type	Passed	Failed	No Show	Total
USA				
Student	2	0	0	5
International				
Student	0	1	0	1

Figure 68 - The Student Attendance Report

CSV – Click this button and wait a moment as the CSV file is generated for download.

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Report – Class List

This report displays list of classes. It can be filtered by several fields. For more information about filters see the ***Filters*** section of this document.

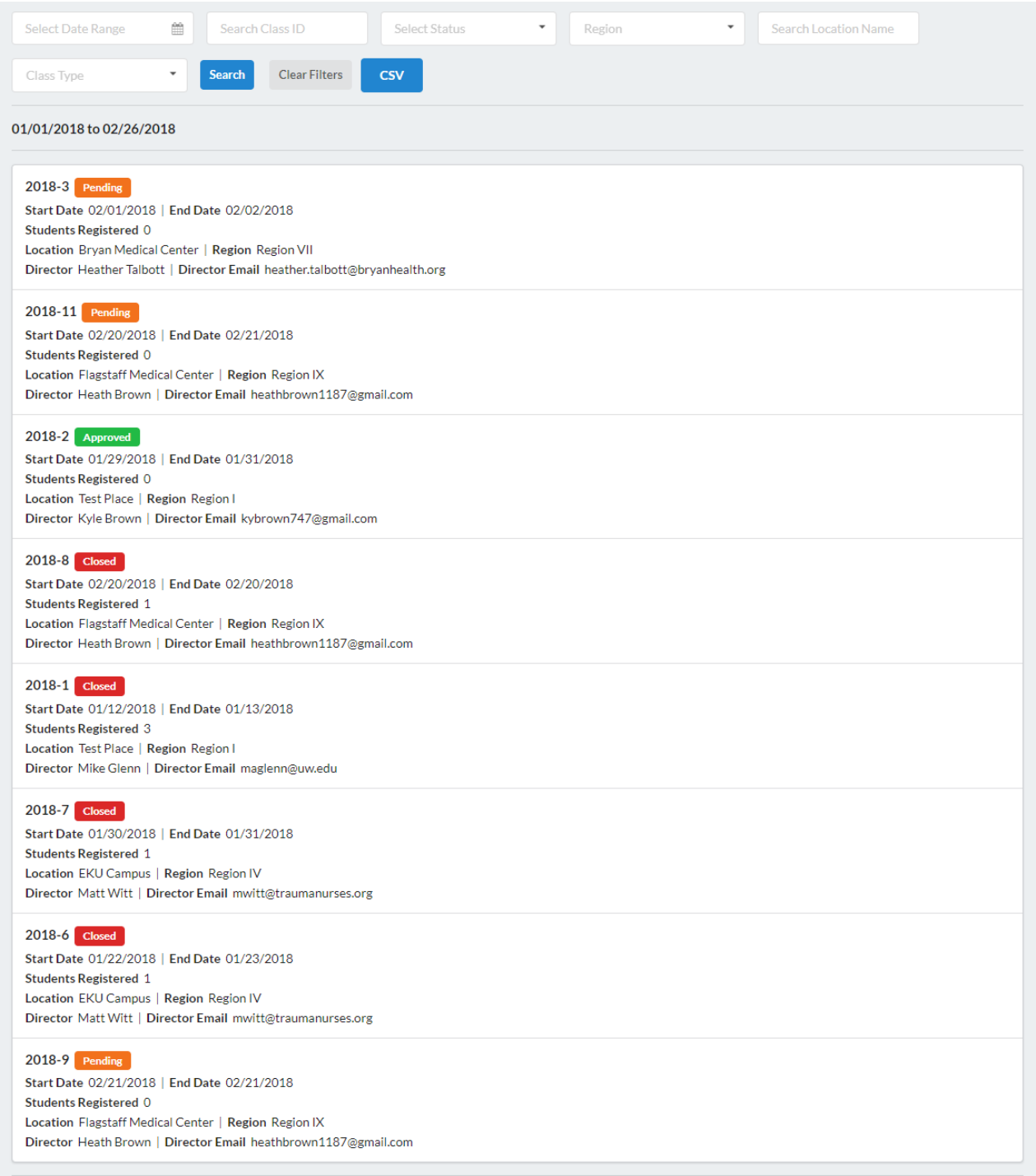

Figure 69 - The Class List Report

CSV – Click this button and wait a moment as the CSV file is generated for download.

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Report – Instructor Potential

This report displays a list of users that have Instructor Potential. It can be filtered by several fields. For more information about filters see the ***Filters*** section of this document.

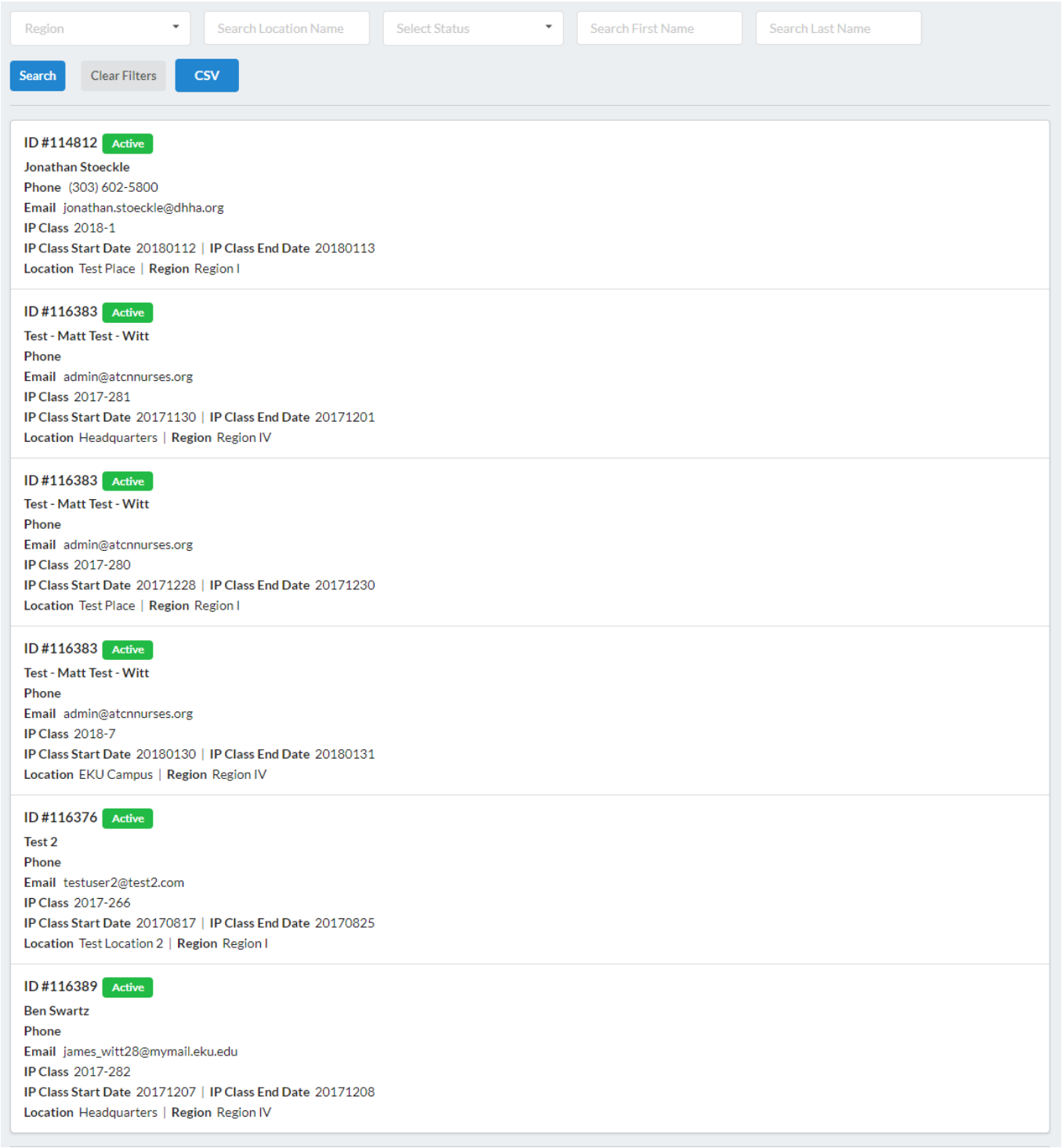

Figure 70 - The Instructor Potential Report

CSV – Click this button and wait a moment as the CSV file is generated for download.

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Report – Class Evaluations

This report displays a list of class evaluations done by students. It can be filtered by several fields. For more information about filters see the ***Filters*** section of this document. Clicking the Class ID Link in the first column will take the user to the details of the evaluation.

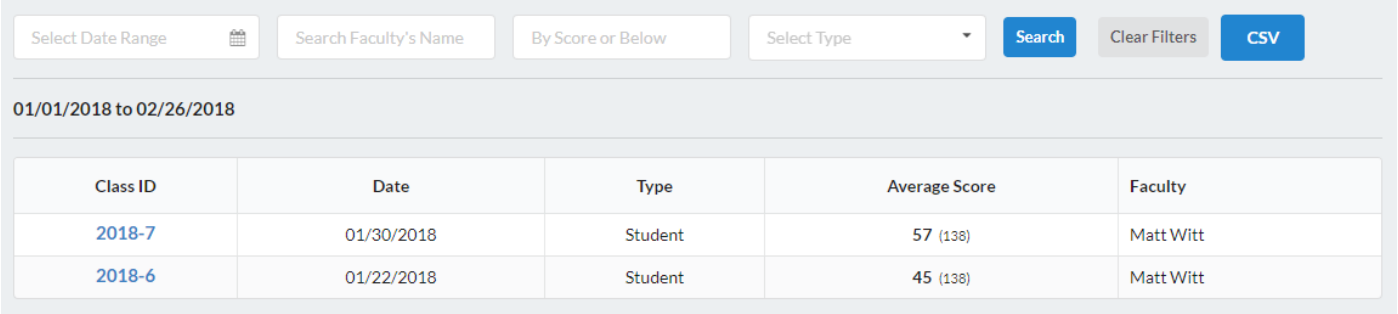

Figure 71 - The Class Evaluations Report

CSV – Click this button and wait a moment as the CSV file is generated for download.

Report – Class Evaluation Details

This screen displays the specific details of an evaluation submitted by a student. This screen displays only information and has no other functionality.

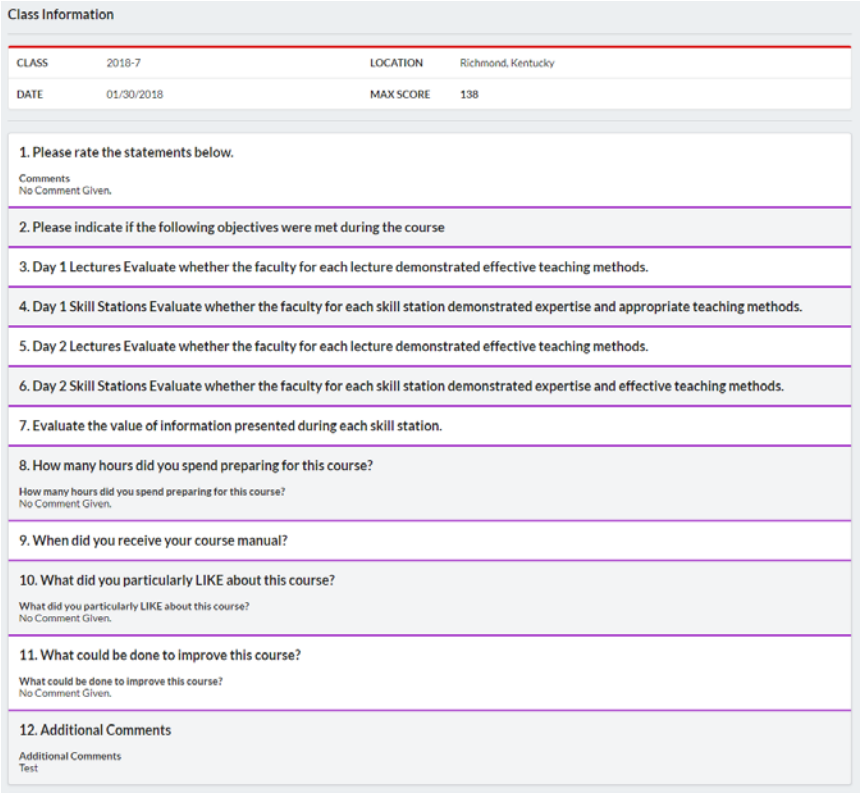

Figure 72 - Class Evaluation Details from the Class Evaluations Report

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User Management [Administration]

This screen displays a list of users in the card view format. Administrators can edit user details or delete users from the system from this screen.

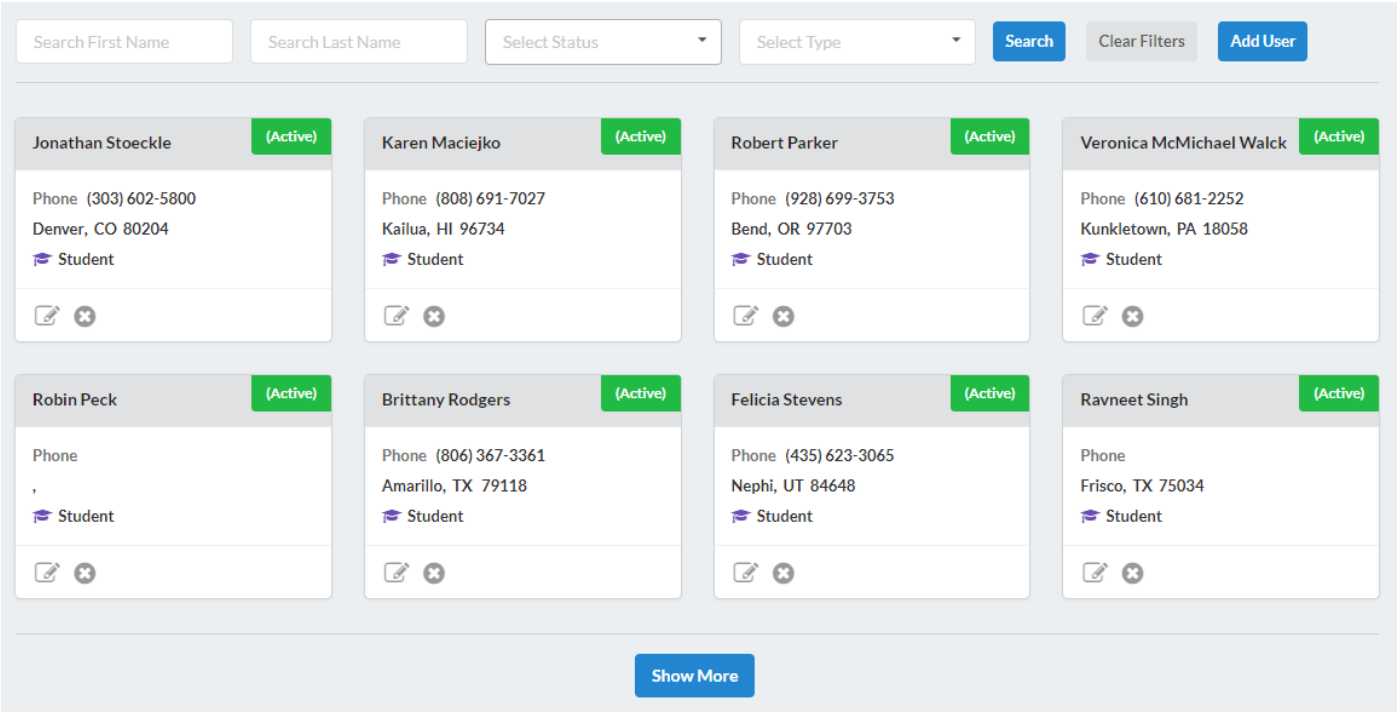

Figure 73 - The User Management Screen for Administrators

User Management Filters – Use the filters to trim down the number of cards until finding the specific Users to manage. For more information about filters see the ***Filters*** section of this document.

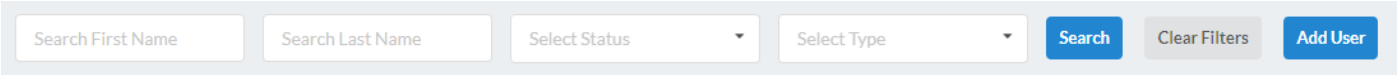

Figure 74 - User Management Filters

Add User Button – Located at the right side of the User Management Filters, this button will take the administrator to the Add User Screen.

User Management Card View – Each card displays basic information about the user it represents. There are two actions that can be performed on each user:

Icon	Name	Description
	Edit User	Takes the user to the Edit User Screen.
	Delete User	Deletes a user from the system.

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Add User [Administration]

This screen allows the administrator to add a new user to the system. Fill out all fields on the add user screen's form.

Organizations – This section of the add user screen allows the administrator to add the user to one or more organizations. Only a user that is assigned the "Director" level can be assigned organizations.

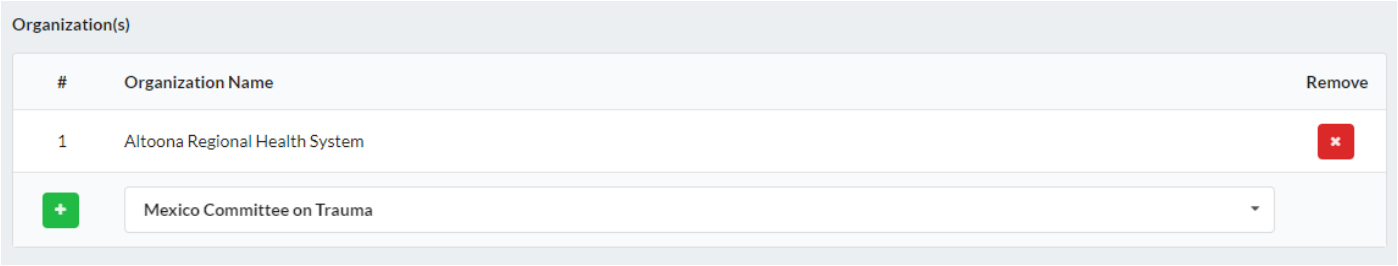

Figure 75 - Organization section on the Add User screen

Use the add button ( ) to add an organization to the organization list. Use the remove button ( ) to remove an organization from the list of organization. Select the organization to add using the dropdown list of organizations before clicking the add button.

Actions: Add User or Cancel – If the user clicks the Add User button the user will be added to the system. Clicking the cancel button returns the user to the main User Management screen.

Figure 76 - Add User or Cancel

Edit User [Administration]

This screen allows the administrator to edit user details.

Organizations – This section of the add user screen allows the administrator to add the user to one or more organizations. Only a user that is assigned the "Director" level can be assigned organizations.

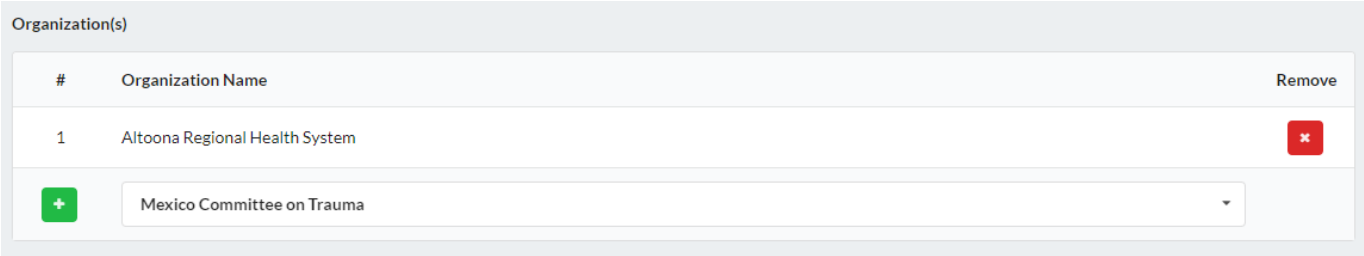

Figure 77 - Organizations section on the Edit User Screen

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Use the add button (+) to add an organization to the organization list. Use the remove button (×) to remove an organization from the list of organization. Select the organization to add using the dropdown list of organizations before clicking the add button.

Actions: Save or Cancel – If the user clicks the save button the user's details will be saved. Clicking the cancel button returns the user to the main User Management screen.

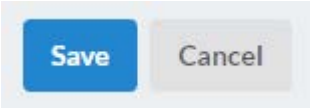

Figure 78 - Actions Save or Cancel on the Edit User Screen

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