CMU Professional Development Services Competency Assessment

Training Manual

Team 12: Jennifer Han, James Ormond, Madeline Duque 4/27/16

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User Assessment

I want to take an assessment as a user

1. Go to the user homepage
2. Click “Take an Assessment” in the navigation bar
3. Read the instructions for completing the assessment
4. Click “Get Started” button
5. From the dropdown menu, choose the competency that you would like to assess yourself on
6. Click “Next” button
7. Go through the set of questions for the assessment. The progress bar at the top indicates how far you have progressed through the assessment.
8. Once you have finished the last question of the assessment, click “Finish” button to view your results.
9. You can view your assessment results. Within each indicator, you can click to view resources associated with the indicator to help you improve in this area.
10. Click the “Generate Pdf” button to download a pdf file of your assessment results

Admin Dashboard

I want to log in as an administrator:

1. Go to https://agile-plains-55196.herokuapp.com/users/signin get to the login page for the admin dashboard
2. Enter the administrator's account's credentials
   a. Username: CMUpdscomp
   b. Password: PD5$ervices
3. After authentication is validated, you will be taken to the home page of the admin dashboard

I want to logout of the admin dashboard:

1. From the navigation bar, click on "Admin Actions"
2. In the dropdown, click "Logout" to successfully leave the administrator dashboard

I want to view the indicators and resources for a specific competency and level that I have in mind:

1. In the navigation bar, click on "View All"
2. Click on "View All Process Flow" button
3. Read the overview of the three steps in the process flow for viewing a competency and its nested data
4. Click "Start View All" to begin the guided step-by-step flow
5. From the dropdown menu, choose the competency that you would like to view
6. Click "Next"
7. From the next dropdown menu, choose the level that you would like to view the indicators and resources for. This will be one of 3 levels: Companion, Contributor, or Champion
8. Click "Next"
9. The next page displays all of the indicators for the specified competency and level that you have selected
10. Click on any of the indicators to view the set of resources associated with that particular indicator

I want to view all of the competency data stored in the system, and then download a pdf of the competency data:

1. In the navigation bar, click on "View All"
2. Click the "View All Report Format" button
3. The following page shows the competencies, the nested indicators within each competency listed, and the associated resources with each indicator
4. To generate a pdf of all stored data in the system, click the "Generate PDF" button

I want to manually create a new competency in the system:

1. In the navigation bar, click on “Manage a Competency”
2. Click on “New Competency”
3. The following page provides two major options of creating a new competency: using the competency creation wizard or uploading data with csv files. We will use the manual method with the competency creation wizard
4. Enter a competency name in the top half of the page
5. Then, click “Create Competency”
6. The following page is where you will create new indicators for the new competency you just created
7. Click “Add Additional Indicator” button
8. From the dropdown menu, choose the level that you would like this new indicator to be for
9. In the text input box labeled “Description”, type the description for the new indicator.
10. Repeat steps 7-9 until you have added all the indicators you would like for the new competency you are creating
11. When you are satisfied with the indicators you have added, click “Next Page”
12. The following page is to create resources that will be linked to the indicators you have just created. Indicators and resources must be linked, and this page is where you will create these mappings
13. Click “Add Another Resource” button
14. From the dropdown menu labeled “Select Indicator…”, select the indicator that you would like to associate a resource with
15. Next, you have two ways to associate a resource with the selected indicator from step 14: add an existing resource from within the system or create a new resource that is not already in the system.
16. To add an existing resource:
    a. Click “Add Existing Resource” button
    b. From the dropdown menu labeled “Select resource”, choose the resource you would like to map to the selected indicator displayed in the dropdown above
17. To create a new resource that doesn’t exist in the system yet:

    . Click the “Create New Resource” button

    a. In the form that pops up, enter in the Resource Name, Description, Category, and Link in the text input boxes
18. To create more resource-indicator mappings, click “Add Additional Resource” and repeat steps 13-17 as necessary.
19. Once you are satisfied with the resource-indicator mappings that you have created on the page, click the “Next Page” button
20. The following page is an overview of the new competency that you have just created. The indicators for the new competency are listed in a table. Click on any of the indicators to view their associated resources.
21. Click “Done” button to finish and save the competency to the database

I want to create a new competency in the system using the csv file upload:

1. In the navigation bar, click on “Manage a Competency”
2. Click on “New Competency”
3. The following page provides two major options of creating a new competency: using the competency creation wizard or uploading data with csv files. We will use the csv upload method
4. Enter a new competency name in the input box in the CSV upload section
5. Click the first “Choose File” button to upload the csv file for the Indicators file. Download the Indicators template on this same page to view how the excel sheets should be formatted
6. Click the second “Choose File” button to upload the csv for the Resources file. Download the Indicators template on this same page to view how the excel sheets should be formatted
7. Then, click the “Upload” button
8. The following page will be the Indicators that have been uploaded
9. Click the “Next Page” button
10. The following page is where the Indicators can be mapped to the Resources. There are three main ways to link an indicator to a resource: add an existing resource from within the system, create a new resource that is not already in the system, or select from an uploaded resource that was added from csv file upload.
11. To add an existing resource:
    a. Click “Add Existing Resource” button
    b. From the dropdown menu labeled “Select resource”, choose the resource you would like to map to the selected indicator displayed in the dropdown above
12. To create a new resource that doesn’t exist in the system yet:
    . Click the “Create New Resource” button
    a. In the form that pops up, enter in the Resource Name, Description, Category, and Link in the text input boxes
13. To select from an uploaded resource from the csv file upload:
    . Click “Select Uploaded Resource” button
    a. From the dropdown menu labeled “Select resource”, choose the resource you would like to map to the selected indicator displayed in the dropdown above
14. To create more resource-indicator mappings, click “Add Additional Resource” and repeat steps 10-13 as necessary.
15. Once you are satisfied with the resource-indicator mappings that you have created on the page, click the “Next Page” button
16. The following page is an overview of the new competency that you have just created. The indicators for the new competency are listed in a table. Click on any of the indicators to view their associated resources.
17. Click “Done” button to finish

I want to view all the resources that exist in the system and filter to see the ones I am looking for:

1. Click on “Manage a Resource” in the navigation bar
2. The following page is a table of all of the resources that are saved in the system

3. Click on “View Description” for any of the listed resources to view more information about the specific resource
4. The filters at the near the top of the page above the table can be used to add filters and narrow down the data displayed in the table

I want to create new resource and save it in the system:

1. Click on “Manage a Resource” in the navigation bar
2. The following page is a table of all of the resources that are saved in the system
3. Click the “New Resource” button
4. In the form on the following page, enter in the Resource Name, Description, Category, and Link in the text input boxes. Check or uncheck the Active box if necessary.
5. Click “Create Resource” button
6. The following page is a confirmation of the new resource that was just created

I want to view an existing assessment and add more questions to the assessment:

1. Click “Manage the Assessment” in the navigation bar
2. From the dropdown menu, choose the competency that you would like to view the assessment for. Each competency has one assessment.
3. Click the “Next” button
4. The following page includes a table of the questions that already exist associated with the competency assessment. This table can be filtered using the filters at the top of the page.
5. To add a new question to the current assessment, type the question in the text input box underneath the “Add New Question” header at the bottom of the page.
6. From the dropdown menu, choose the indicator that this question is linked to
7. Click on the “Add Question” button
8. The page will refresh and the new question you have added has been saved to the system

I want to reset the database

1. Click “Dashboard” in the navigation bar
2. Scroll down to the Resetting Test Database section
3. Click “Reset Database” button
4. Enter the administrator’s account’s credentials
    a. Username: CMUpdscomp
    b. Password: PD5$ervices
5. Click “Submit” button
6. Confirm the popup
7. Wait a few seconds as this process takes some time