

# Admin Manual

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## Intro:

Only Admin users can create, edit and delete contacts. These options will not be available to regular user accounts. Regular users will not be able at any time to create, edit, delete contacts. Regular users are also unable to invite or delete other users.

## Creating a contact:

Navigate to the create a contact page by clicking the new contact button the bottom of the search contact page. Fill in the fields, the required fields are first name(or just name if it laboratory type), phone number and address. Attempting to create a contact without these fields will result in an error message and the contact will not be created. If all of the appropriate fields are filled you will be redirected back to the search contacts page and that new contact will be visible in the list.

Clients Patients Contacts Calendar Admin Logout

### New contact:

What type of volunteer is this? Veterinarian

First Name: \*

Last Name: \*

Phone Number: \*

Fax Number: \*

Email: \*

Address Line 1: \*

Address Line 2: \*

City: \*

Create

Required fields are denoted by a red star, an error message will let you know if you have missed any of these fields

## Editing a contact:

Clicking on one contact name will bring you to the information page for that contact. Clicking the edit contact button will bring you to the edit contact page. You may edit any field of the contact and upon successful update you will be brought back to the info page for that specific contact.

Editing: Joan Atkinson

What type of volunteer is this? ☒ Veterinarian ☐ Volunteer ☐ Laboratory ☐ Technician

First Name: Joan

Last Name: Atkinson

Phone Number: 780-123-2398

Fax Number:

Email: at@hotmail.ca

Address Line 1: 123st BlueCresent

Address Line 2:

City: Edmonton AB

Done Editing Delete Contact

Type of contact may be changed, even from Volunteer to Laboratory if need be

## Deleting a contact:

Deleting a contact is irreversible. Once you click the delete button that contact is gone, so if this is the only record of that contact's information and you wish to change that contact's type this should be done through editing, not deletion and new creation.

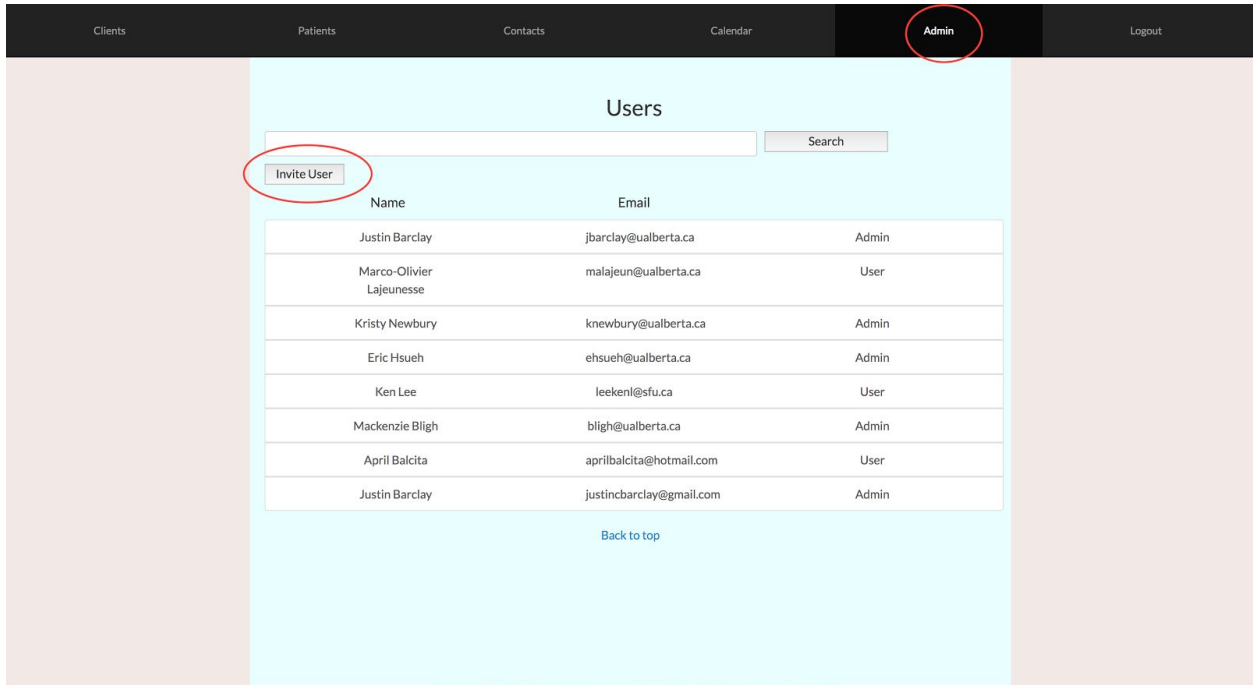
The screenshot shows a web application interface with a dark navigation bar at the top containing links for Clients, Patients, Contacts, Calendar, Admin, and Logout. The main content area is titled 'Editing: Joan Atkinson'. Below the title, there is a dropdown menu labeled 'What type of volunteer is this?' with 'Veterinarian' selected. The form includes several input fields, each with a red asterisk indicating a required field: First Name (Joan), Last Name (Atkinson), Phone Number (780-123-2398), Fax Number (empty), Email (at@hotmail.ca), Address Line 1 (123st BlueCresent), Address Line 2 (empty), and City (Edmonton AB). At the bottom of the form, there are two buttons: 'Done Editing' and 'Delete Contact'. The 'Delete Contact' button is circled in red, and a red text note to its right states 'Note that deletion is irreversible'.

## User Management:

One important user account disclaimer. Never delete all of the users, and never delete all of the admin users. If there is no admin user left you will not be able to invite other users to the system. So if you wish to maintain one main admin user and then change that account to a different admin user, create the new one first and then you may safely delete the first one.

## Invite User:

Starting from the admin page, to invite a new user, click on the invite user button.



The screenshot shows a web application interface. At the top is a dark navigation bar with links: Clients, Patients, Contacts, Calendar, Admin (circled in red), and Logout. Below this is a light blue section titled 'Users'. Inside this section, there is a search bar and a button labeled 'Invite User' (circled in red). Below the search bar is a table with three columns: Name, Email, and a third column (likely Role). The table contains eight rows of user data. At the bottom of the table is a link that says 'Back to top'.

Name	Email	
Justin Barclay	jbarclay@ualberta.ca	Admin
Marco-Olivier Lajeunesse	malajeun@ualberta.ca	User
Kristy Newbury	knewbury@ualberta.ca	Admin
Eric Hsueh	ehsueh@ualberta.ca	Admin
Ken Lee	leekenl@sfu.ca	User
Mackenzie Bligh	bligh@ualberta.ca	Admin
April Balcita	aprilbalcita@hotmail.com	User
Justin Barclay	justinbarclay@gmail.com	Admin

After clicking the “Invite User”, this will transition you to the invite user page, where you will be prompted to enter the name of the user and their email. It’s important to note, that you may only set the user’s account type at the creation of the account.

ClientsPatientsContactsCalendarAdminLogout

New User

Name

New User

Email

newuser@email.com

User type

User

Invite User

Back to top

After you click the “Invite User” button, if the invite is successful you will be redirected to the main Admin page. However, if there is a problem with the process an error message will appear the Name input field.

ClientsPatientsContactsCalendarAdminLogout

New User

Please enter a valid email

Name

New User

Email

newuser@email

User type

User

Invite User

Back to top

## Deleting a User or Resetting a Password:

Starting from the Admin page, click on a user.

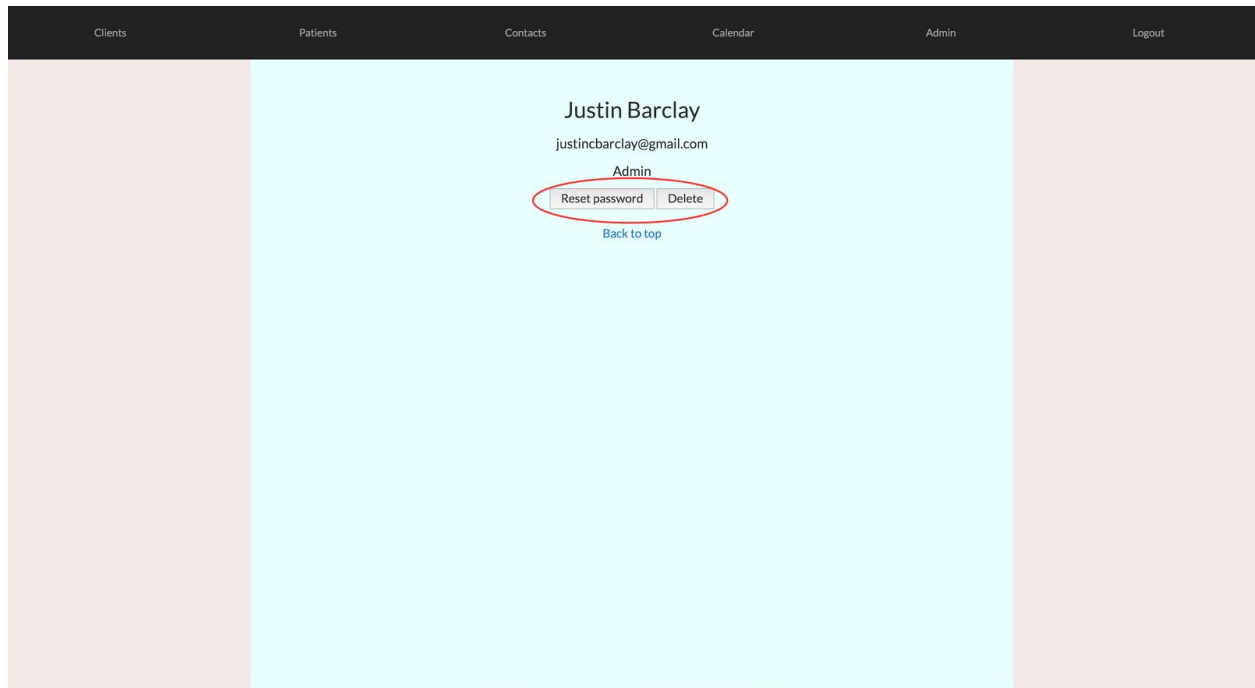
The screenshot shows the Admin interface with the following elements:

- Header: Clients, Patients, Contacts, Calendar, **Admin**, Logout
- Section: Users
- Search:  Search
- Buttons: Invite User
- Table of Users:

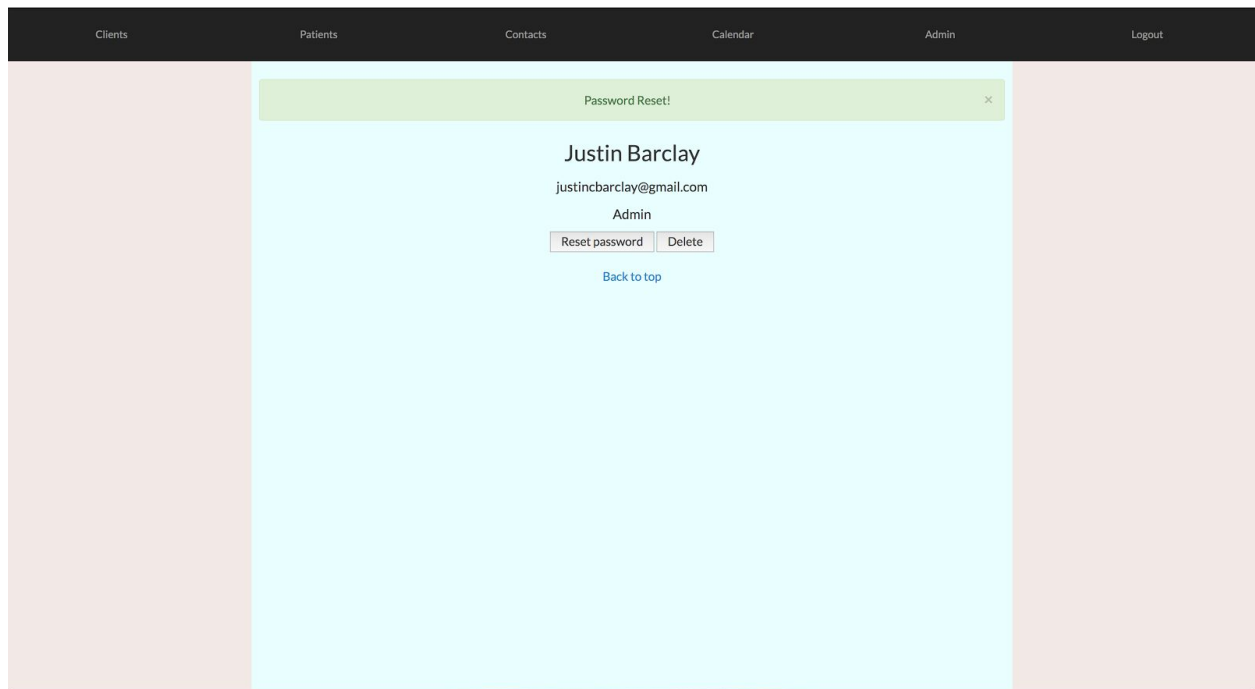
Name	Email	Role
Justin Barclay	jbarclay@ualberta.ca	Admin
Marco-Olivier Lajeunesse	malajeun@ualberta.ca	User
Kristy Newbury	knewbury@ualberta.ca	Admin
Eric Hsueh	ehsueh@ualberta.ca	Admin
Ken Lee	leekenl@sfu.ca	User
Mackenzie Bligh	bligh@ualberta.ca	Admin
April Balcita	aprilbalcita@hotmail.com	User
Ariel Raudsepp	ariel.raudsepp@gmail.com	User
Justin Barclay	justincbarclay@gmail.com	User

[Back to top](#)

You will then be transitioned to that user's page. From here you can click on the "Reset password" button to send an email to the user containing a link for them to reset their password. Or, you can click on the Delete button, which will permanently delete their account from the database.



If you click on the “Reset password” button a green notification button will appear at the top of your screen to let you know an email has been sent.



If you click on the Delete button, upon successful completion of deleting the user you will be redirected to the main Admin page. You can visually confirm the user's deletion by observing that the user is no longer in the user list.



Clients

Patients

Contacts

Calendar

Admin

Logout

Users

Search

Invite User

Name	Email	
Justin Barclay	jbarclay@ualberta.ca	Admin
Marco-Olivier Lajeunesse	malajeun@ualberta.ca	User
Kristy Newbury	knewbury@ualberta.ca	Admin
Eric Hsueh	ehsueh@ualberta.ca	Admin
Ken Lee	leekenl@sfu.ca	User
Mackenzie Bligh	bligh@ualberta.ca	Admin
April Balcita	aprilbalcita@hotmail.com	User
Ariel Raudsepp	ariel.raudsepp@gmail.com	User

Back to top

Notice

justincbarclay@gmail.com is no longer in the list.

ahas.herokuapp.com/admin/users/1