IHMP – SOR MANUAL

(Immaculate Heart of Mary – System of Records Manual)
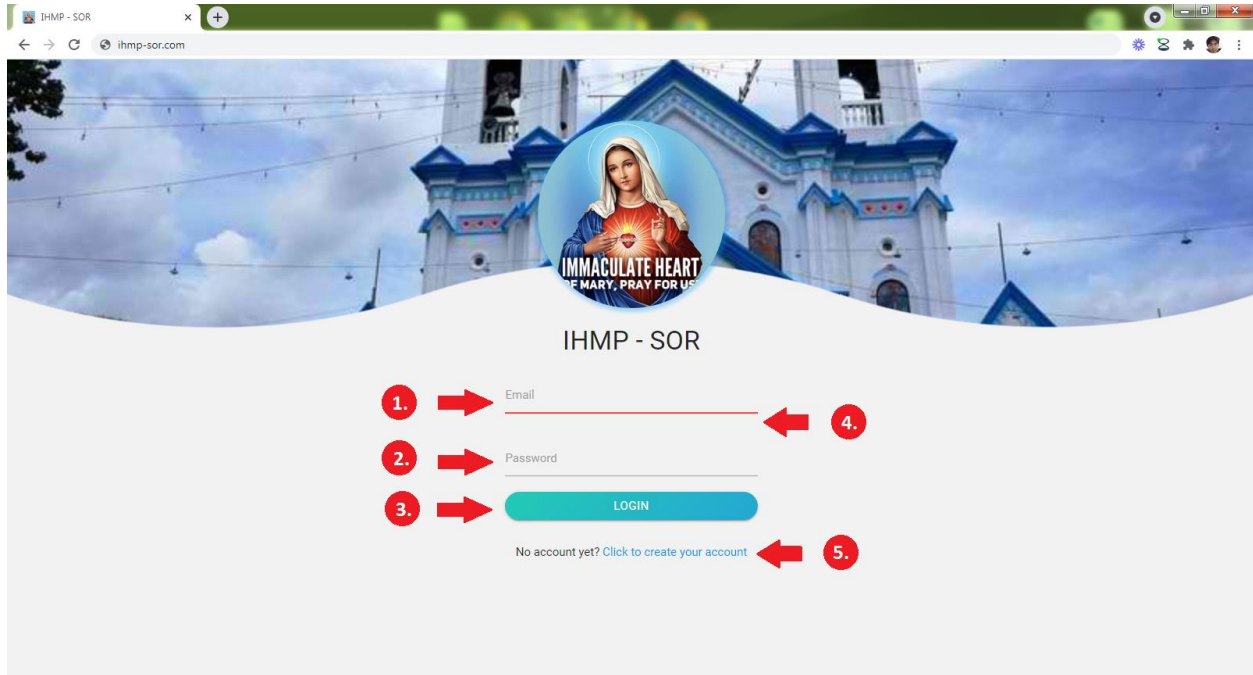
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How to access IHMP-SOR?

To access the IHMP – SOR application, type in the URL **"ihmp-sor.com"** in the address bar or if you can't access it via URL you can use the servers **Static IP Address.**

User Login

In Login Screen, you should see 5 different elements on it, email field, password field, login button, Link to the registration screen and the error message that will only show if there is something wrong during login process.

Elements Definitions

1. **Email:** Key in the email that you used in creating your account.
2. **Password:** Key in your password, if you forgot your password you need to ask to your administrator to reset your password. After your administrator confirms the reset process the new password will be "**1234567890**".
3. **Login Button:** Make sure that you supply the email and password then you can click this button to attempt to login. When the credentials supplied is valid then you will be redirected to Records Screen. If it is invalid then a message under the email field will show.
4. **Error Messages:** This element will only show if the credentials used in login is invalid. There are two different errors that you can expect.
   a. Errors are the ff.
      i. **No matching records found** – this error message simply means that the credentials used to login is invalid. It's either your email is wrong or your password.

ii. **This account is not yet active** – this error message means that the created account is not yet active and it needs activation by administrator. To resolve this issue request your administrator to activate your account. All you need to give to your administrator is your email or your name so the administrator could search your account.

User Registration

In Registration Screen you should see 6 different elements and when account registration is successful you see a message in a green container above the Name field.

Element Definitions

1. **Name –** This field is not strict and you can use either your full name or first name or last name.
2. **E-mail Address –** This field is important as it is being used as your credential to login on the app.
3. **Password –** This field requires at least 8 characters.
4. **Confirm Password –** This field is to validate the password you input in password field if it is correct.
5. **Register Button –** Click this after you fill up the form. After clicking it and the app identifies that all fields are valid, the app will create your account and will show a message that your account is still needs to be activated.
6. **Login Instead? –** This link will send you back to login screen.

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Introducing Screen Navigations
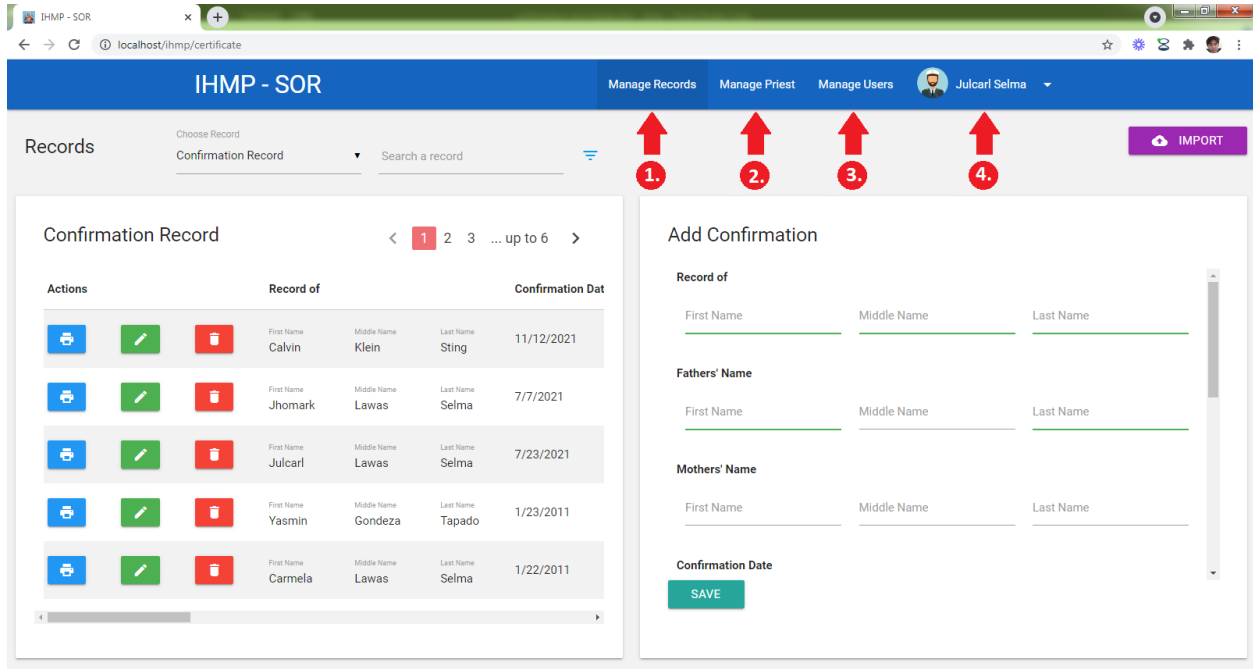
What you are seeing now is the landing page after you successfully login your account and it has 4 different navigations.

Different navigations

1. **Manage Records –** This is where the main transactions will happen, saving records for confirmation, baptismal, marriage, and, death records.
2. **Manage Priests –** This page is to save the names of the parish priests to be assigned in each certificate.
3. **Manage Users –** This page is to activate/deactivate user's account, reset user's password, and, changing user's account type.
4. **Account Name Dropdown –** In this dropdown navigation you can the profile navigation and the logout link.
   a. **Profile Navigation –** This page is to update your name, email, and, password
   b. **Logout Link –** This will logout your account to the application.

Manage Records

Manage Records page is also the landing page after you successfully logged in your account. In this page it is divided into 4 categories.

Screen Categories

1. **Record Filter** – This part of the screen will do the filtering of the page. Record filter has 3 different filters. Different filters are the following.
    a. **Choose Record** – This will filter what type of record you are about to manage. It consist 4 different records, Confirmation Record, Birth Record, Marriage Record, and, Death Record.
    b. **Search a Record** – This filter specifies a specific record that you want to show. You can search the First Name or the Last Name of the record that you want to manage.
    c. **Small Filter Icon** – This will show popup modal that can filter different records that been added on that specific date range.
2. **Import Button** – This will show a popup modal that will do the import process
3. **Add/Update Form** – This will do the adding or updating of each record.
4. **Table of Records** – This is where you can find all the saved records.

Understanding Manage Records Functionalities

Manage Record has 7 elements you need to remember.

Elaborating 7 elements

1. **Add/Update Form** – This is the form for adding and updating. This is where you fill up the information of a certain record. After you fill up the necessary fields you can proceed to number 2. Take note that this element can be vertically scroll.
2. **Save Button** – This will save/update the record that you fill up in the Add/Update Form.
3. **Table of Records** – This is where you can find the added records. Take note that this element can be horizontally scroll.
4. **Pagination Buttons** – The table of records will display only 5 records as a default. In order for the user to show another records they can use this element to go to another set of records.
5. **Print Button** – This will do the print functionality but before printing there will be a validation to it and will ask you if you want to set the parish priest first on the selected record before printing it.
6. **Update Button** – Clicking this button will get the information of the selected record and will fill up the Add/Update Form and you can do the updating of the selected record.

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7. **Delete Button** – Clicking this button will show you a popup modal that will ask for confirmation to delete.

Using Date Pickers
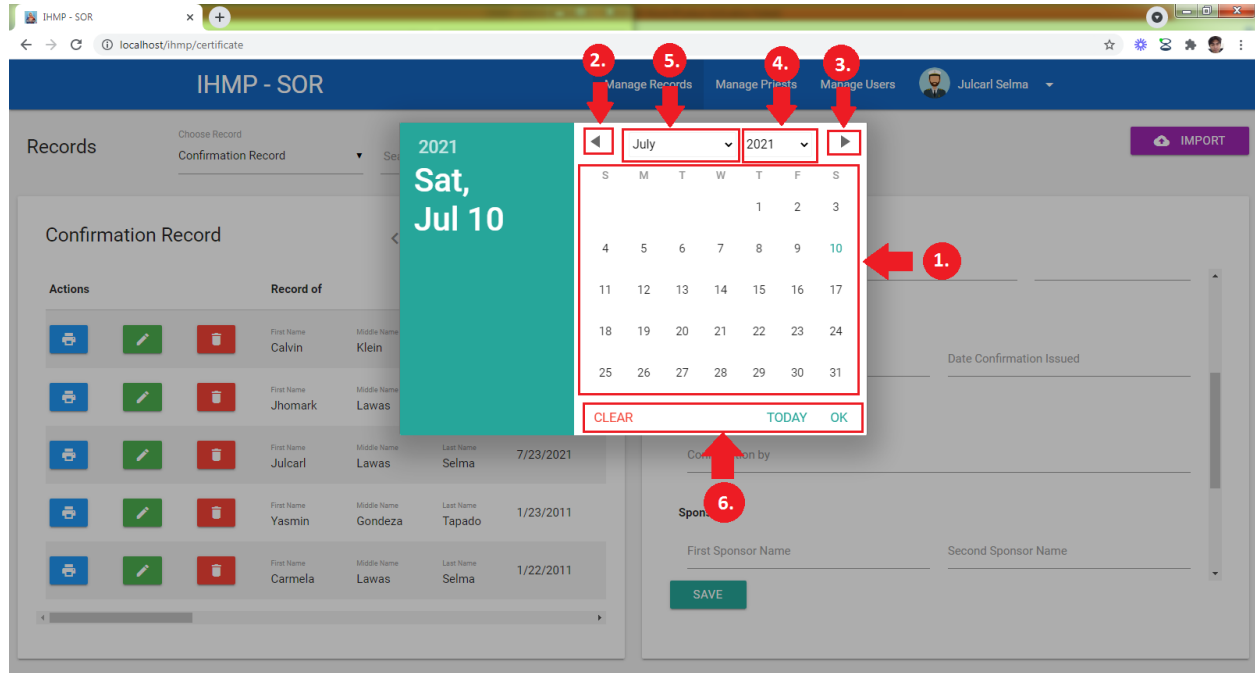
In Add/Update form there are some fields that require date. Our application uses a date picker. To understand how this date picker works see the instruction.

Date picker

1. Table of Dates – This is where you are going to select the date.
2. Left Icon – This icon will move the current month displayed to the previous month.
3. Right Icon – This Icon will move the current month displayed to the next month.
4. Year Dropdown – This is where you set the year for your date.
5. Month Dropdown – This is where you set the month.
6. Final options – This is where you finalize the dates. There are 3 different options.
   a. CLEAR – Selecting clear will clear your selection of dates.
   b. TODAY – This will select the current date.
   c. OK – This will finalize the date selected and will display it in the Add/Update form.

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Printing Record

Step 1: Select the record you want to print.

Step 2: If there is no parish priest set on that record this popup dialog will show. You can choose either yes or no. Selecting yes will bring you up the parish priest records.
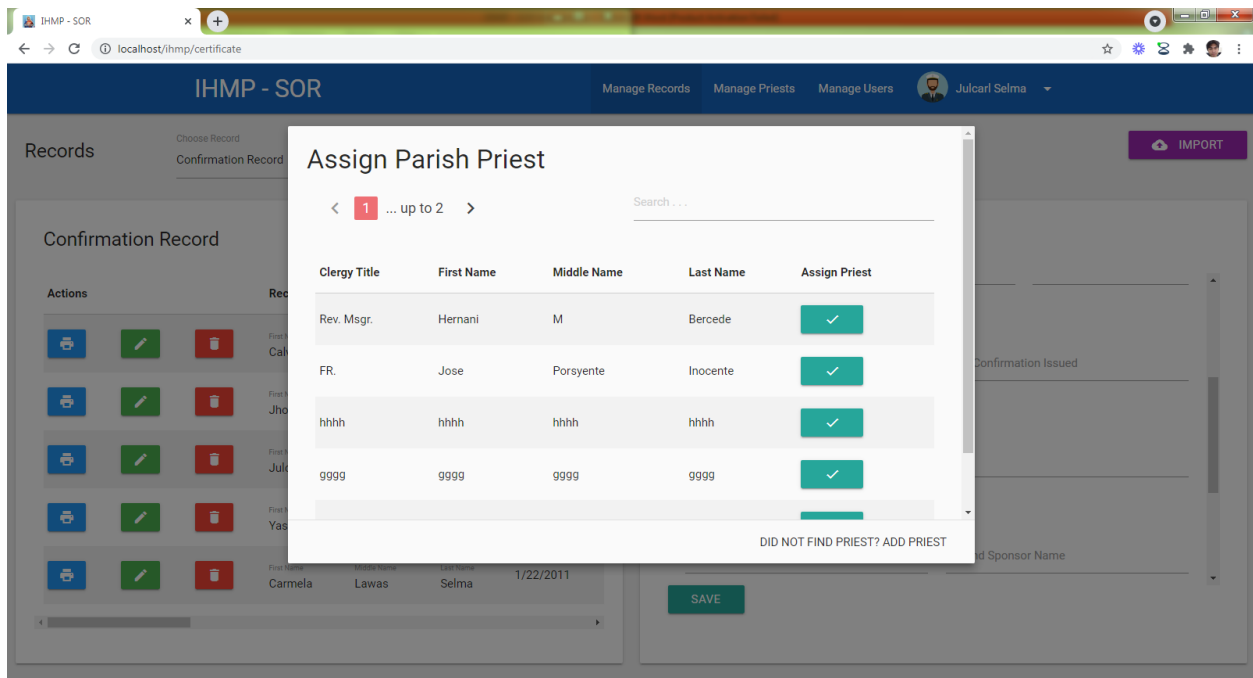
Step 3: If you select Yes, This is the popup modal to set/assign parish priest on the selected record. Clicking the check icon will assign it to the record selected and will show you the printing dialog.
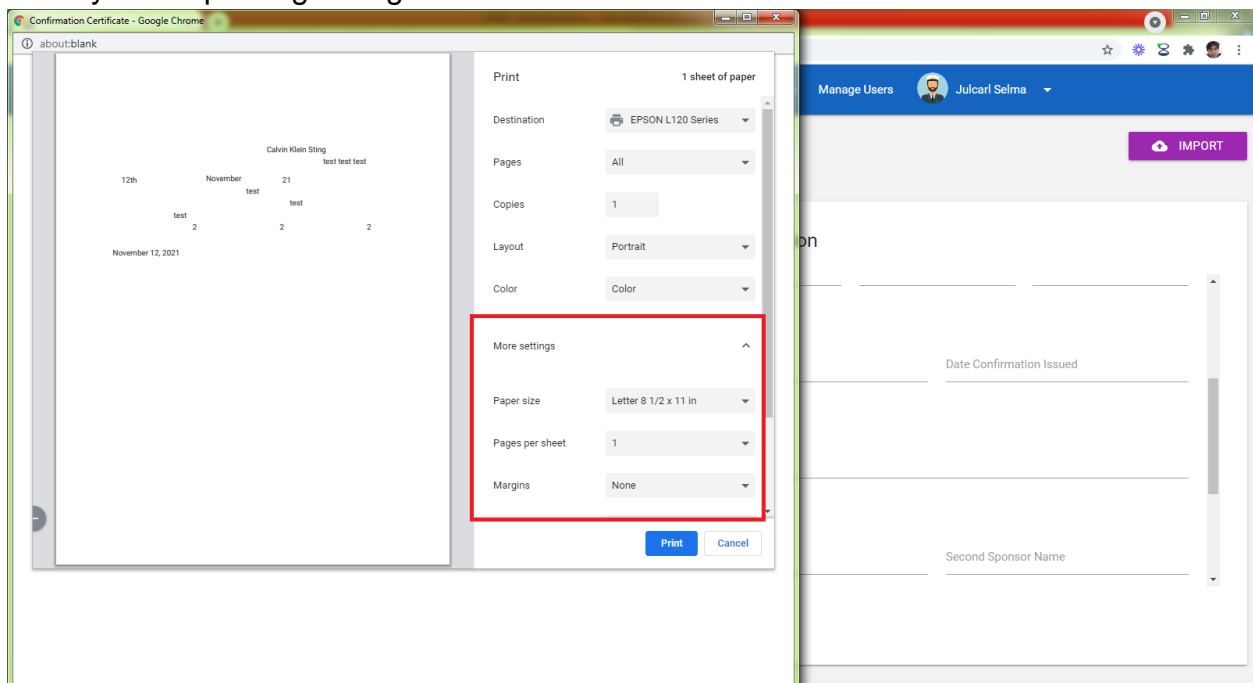
Step 4: Final Step this is the printing dialog, Make sure in your More Settings the **Margin is set to None** and the **Scale is set to Default.**

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Updating Record

In updating records, follow this steps.

Step 1: Select a record that you want to update by clicking the green update icon button

Step 2: After selecting the record, its information will be transferred on each fields of the Update form. You can edit the information there and you may proceed to step 3.

Step 3: There will be two options.

    a. **Save –** Selecting Save button will save the transaction.
    b. **Cancel –** Selecting Cancel button will abort the transaction.

Deleting Records

Step 1: Select the record that you want to delete by simply clicking the red delete icon button.

Step 2: After selecting a record to delete a popup modal will show to ask a delete confirmation. There will be two options for that.

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a. **Delete Button** – This will continue the deletion of record
b. **Cancel Button** – This will cancel the deletion of record.

Importing of Records

Step 1: Click the Import Button at the top right corner of the screen and it will show a popup modal for the import form.

Step 2. Import form is divided by 2 elements.

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1. **Main Import Form** – In this area there will be 4 different steps that you can follow. Instructions are being written in the popup so just follow what it says.
2. **Sample Data Table** – In this area, it will display the data that are about to import but before it will display the application will filter out that has duplicated rows.

Manage Priests

In this page you can manage the data of Parish Priests.

7 elements in screen

1. Add/Update Priest Form – This is the transaction for adding and updating will happen. All you need to do is to supply the required fields and I clicking save button.
2. Table of Records – This is where the application displays the parish priests that being added.
3. Search – You can search the record that you want to update.
4. Pagination Buttons – Navigate to another batch of records using paginations
5. Table of Records – Table that holds the parish priests records
6. Delete Button – When this button is clicked a delete confirmation popup modal will show. There will be two options in the popup.
   a. Delete – Will continue to delete the record.
   b. Cancel – Will cancel the transaction.
7. Update Button – To update a record just select the color blue pencil icon and all information of the priests will be transferred to Add/Update Priest Form and you may proceed to editing its record.

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Manage Users

In this form, we can see that the table of records has 3 different options.

1. **Red Key Icon Button** – This button will updates/reset users password.
2. **Green Sync Icon Button** – This button will switch the users user type.
3. **Blue Group People Icon Button** – This button will deactivate the selected users account.

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Editing Users Profile Account

To navigate on this screen, select the dropdown navigation that has your name on it and then select dropdown.

Notice that you can update only the Name, Email, and password.

IMPORTANT NOTICE:

Application may experience some issues that the developer did not experienced during on its development process. If this will happen please grab a screenshot and contact the developer so the developer could attend to the issue right away.