



DATABASE APPLICATION USER MANUAL

PATHFINDER YOUTH CENTRE SOCIETY

Table of Contents

Logging In	3
Home Screen	4
Navigation Bar	5
Filtering Participants by Status	5
Participants List View	6
Sorting Participants.....	6
Searching Participants.....	6
Pagination	7
View Full Participant Information	7
Viewing a participant record.....	8
Participant Notes	9
Note History.....	9
Adding a Note	9
Participant History	10
Participant Record Actions – View mode	11
Edit.....	11
Approve	11
Decline	11
Archive	11
Restore.....	12
Delete	12
Editing a participant record	12
Participant Record Actions – Edit mode	13
Confirm	13
Cancel	13
Creating a participant record	14
Participant Record Actions – Create mode	15
Confirm	15
Cancel	15
New Applications.....	16
Processing a New Application.....	16
Edit.....	17

Accept and Save.....	17
Discard Submission.....	17
Statistics.....	18
Refreshing Statistics.....	18
Saving Participant Data Locally.....	19
Viewing Statistics by Demographic	19
Staff Management	20
User Actions	20
Edit.....	20
Reset Password.....	20
Delete	21
User Roles	21
Adding a New User	21
Completing Enrollment	21
Troubleshooting	22

Logging In

If you have an existing staff user account and you want to log in, navigate to <http://pathfinderyouthsociety.web.app/sign-in>. If you are not already signed in, you will see the following login page:



The screenshot shows the login page for the Pathfinder Youth Centre Society. At the top is a dark green header with the text "Pathfinder Youth Centre Society Participant Database". Below the header is a logo featuring three stylized human figures in green and black, with the text "PATHFINDER YOUTH CENTRE SOCIETY" and "Staff Login Portal" underneath. The login form consists of two input fields: "Email address *" and "Password *". Below these fields is a green "SIGN IN" button. At the bottom of the form are two links: "Show password" and "Forgot password?".

Enter your email address and password and press sign in or the enter key on your keyboard.

If you forget your password, you must contact your supervisor. They will be able to send you a password reset link.

Note: If you don't have an account, you must have your supervisor create one for you before you can log in. For information on account creation, see *Adding a New User* on page 21.

Home Screen

Once you are logged in, you will see the following home screen. The default view is the Participants List View.

The screenshot shows the 'Pathfinder Youth Centre Society Participant Database' interface. It features a green header bar with the title and a log out icon (3). Below the header, the user's name 'Ruth Lee' is displayed (1). A navigation bar (2) on the left contains links for 'Participants' (selected), 'New Applications', 'Statistics', and 'Staff Management'. The main area displays a 'Participants' table with columns: Last Name, Given Name(s), Status, Date of Birth, City, and Enrolled. The table contains four rows of participant data. A search bar (4) with a 'SEARCH' button is located above the table. The table header (5) includes a sort arrow for the 'Enrolled' column. At the bottom right, there is an 'Add record' button (6) represented by a green circle with a plus sign. The table footer shows 'Rows per page: 20' and 'Page 1'.

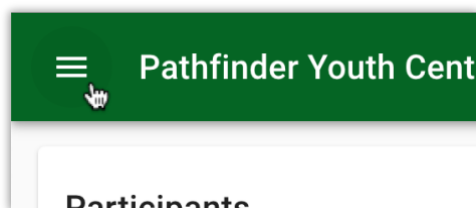
Last Name	Given Name(s)	Status	Date of Birth	City	Enrolled ↓
Lei	Heng	PENDING	Mar 17, 2002	Burnaby	May 18, 2020
McClelland	Cameron	PENDING	Jan 1, 2001	Vancouver	May 16, 2020
Nguyen	Aidan	APPROVED	Jul 8, 2001	Delta	May 16, 2020
McDonnell	Gabrielle	DECLINED	Aug 17, 1998	New Westminster	May 15, 2020

Note: There may be a slight delay before the table populates, as the records are being loaded from the database.

The components are as follows:

1. The name of the current logged-in user
2. Navigation bar
3. Log out button
4. Record search bar
5. Table header and sort fields
6. Add record button

Note: If your window is too narrow to display the full page, you won't see the navigation bar. To open it, click the three lines in the top left corner.



Navigation Bar

The navigation bar is the central hub for switching views, filtering records by status, and exploring participant information. From here, you have access to the participants list, the new applications list, a statistics view, and, for admin users, a staff user management interface.

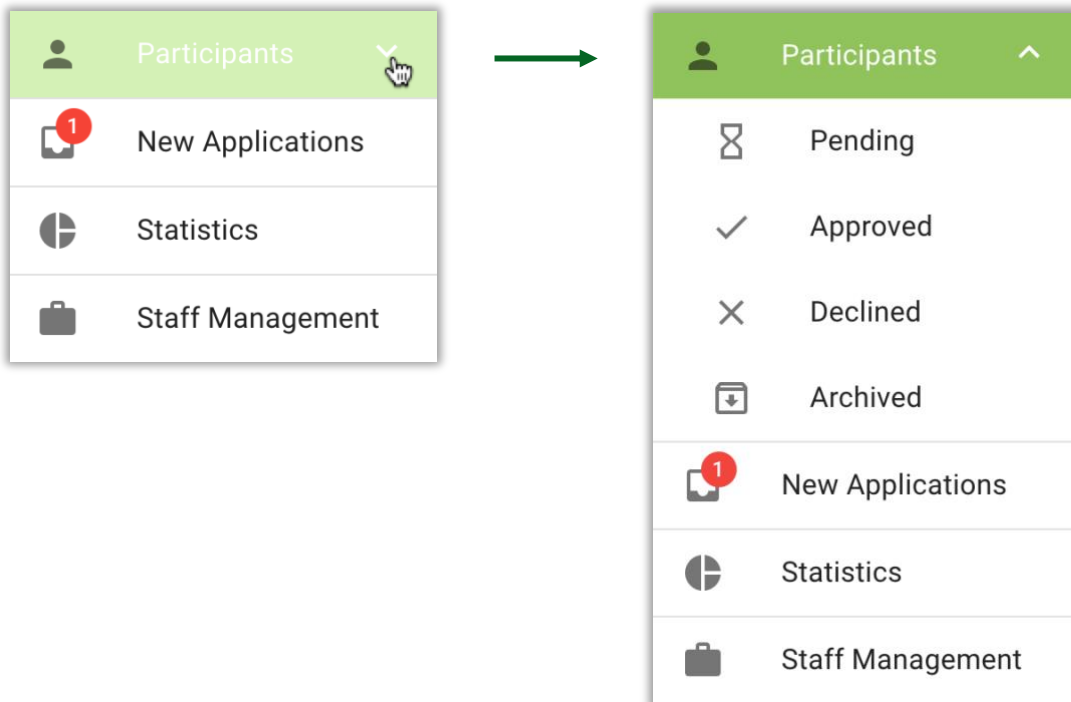
Note: The “Staff Management” button will only be visible if the current user is an admin.

Filtering Participants by Status

Participant records can have one of five statuses:

NEW	A new application that has not yet been saved into the system
PENDING	A participant who has started the application process, but who hasn't yet been approved or declined
APPROVED	A participant that has been approved to join the program
DECLINED	A participant whose application has been declined
ARCHIVED	An archived record. Archived records do not appear in the main participant view and can be deleted completely from the database.

To filter participants by status, click on the expand arrow on the participants button in the navigation bar. Click on one of the statuses to filter the table.

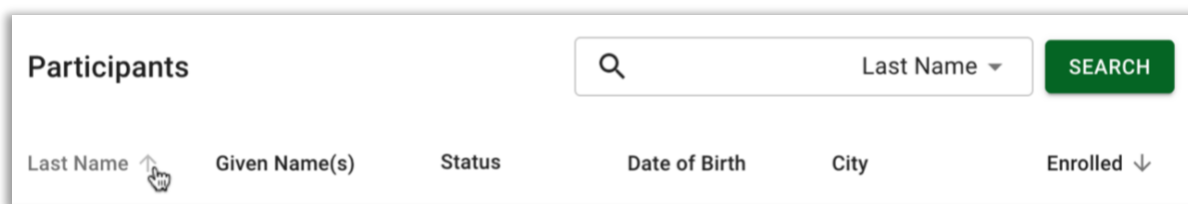


Participants List View

From the participants list view, you can view, sort, and search participant records. By default, the participants list shows Approved, Pending, and Declined participants.

Sorting Participants

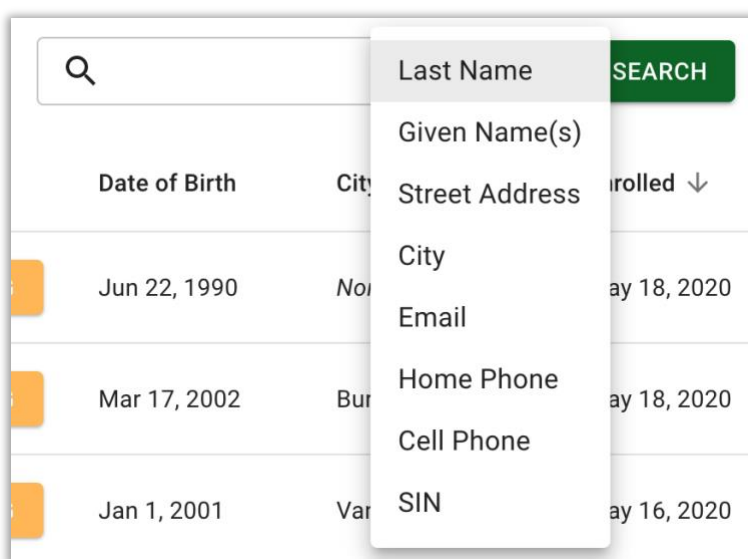
The column the table is currently sorted by is indicated by an arrow. By default, the table is sorted by the most recently created records. To sort by other categories, mouse over the desired column header and an arrow will appear. Clicking on it will sort the table by that column. To change whether the sort is ascending or descending, click on the arrow again.



Note: It's not possible to sort by status. You can filter by status using the sidebar.

Searching Participants

To search for a specific participant record, use the search bar in the top of the table. The default search is by last name, but you can change the search field by clicking on the arrow in the search box. To clear a search and see the full list again, delete the text in the search box and press Search or the enter key on your keyboard.



Note: While using the search function, only the field you've selected to search by can be used to sort the results.

Pagination

You can change the number of records visible per page and navigate between pages using the dropdown and arrows at the bottom of the table.

Rows per page: 20 ▼ Page 1 < >

View Full Participant Information

When you want to see a participant's full details, click on their entry in the table.

Participants						<input type="text" value=""/>	Last Name ▼	SEARCH
Last Name	Given Name(s)	Status	Date of Birth	City	Enrolled ↓			
Firkus	Brian	PENDING	Jun 22, 1990	Surrey	May 18, 2020			
Lei	Heng	PENDING	Mar 17, 2002	Burnaby	May 18, 2020			
McClelland	Cameron	PENDING	Jan 1, 2001	Vancouver	May 16, 2020			
Nguyen	Aidan	APPROVED	Jul 8, 2001	Delta	May 16, 2020			
McDonnell	Gabrielle	DECLINED	Aug 17, 1998	New Westminster	May 15, 2020			
						Rows per page: 20 ▼ Page 1 < >		

Viewing a participant record

When a participant record is opened, this screen appears. Here, you can view, edit, approve, decline, and archive participant records. This screen differs slightly, depending on the status of the record you are viewing.

The side navigation drawer contains a back button that will return the user to the list view and a list of the different sections of the participant record. It also lists two additional sections: one for staff notes and one for participant record history.

The screenshot displays the 'Pathfinder Youth Centre Society Participant Database' interface. At the top, a green header bar contains the title and a share icon. Below the header, a side navigation drawer is visible on the left, listing various sections: Basic Information, Program Information, Employment Equity, Medical Information, Financial Information, Current Situation, Questions, Notes, and History. The 'Basic Information' section is highlighted. Above the drawer, the name 'Ruth Lee' is displayed, and a green box with the number '5' points to a 'Back' button. The main content area is titled 'Viewing participant record - Basic Information' and shows details for 'Cameron McClelland'. A green box with the number '1' points to the side navigation drawer. A green box with the number '2' points to the participant data fields. A green box with the number '3' points to the action icons (edit, like, comment, share). A green box with the number '4' points to the 'PENDING' status button. A green box with the number '5' points to the 'Back' button.

GIVEN NAME(S)	LAST NAME	CONFIRMATION NUMBER
Cameron	McClelland	None

STREET ADDRESS	CITY
432 Hastings Street	Vancouver

PROVINCE	POSTAL CODE	TIME LIVED AT ADDRESS
British Columbia	V6C 1B4	2 years

HOME PHONE	CELL PHONE	BEST NUMBER TO CALL
None	(604) 339-1850	Cell

EMAIL	BIRTHDATE
cameronmcclelland@gmail.com	Jan 1, 2001

EMERGENCY CONTACT 1 - NAME	EMERGENCY CONTACT 1 - RELATIONSHIP
Helen McClelland	Mom

The components are as follows:

1. Participant record navigation
2. Participant data
3. Participant record actions
4. Current participant status
5. Back button

Participant Notes

The notes section contains an interface for staff members to add and view notes about a participant.

The screenshot shows the 'Pathfinder Youth Centre Society Participant Database' interface. On the left is a sidebar with a user profile for 'Ruth Lee' and a list of menu items: 'Basic Information', 'Program Information', 'Employment Equity', 'Medical Information', 'Financial Information', 'Current Situation', 'Questions', 'Notes' (highlighted), and 'History'. The main content area is titled 'Participant Details - Notes' for 'Brian Firkus'. It features a 'New note field' with a text input containing 'Brian just had an interview.' and an 'ADD NOTE' button. Below this is a 'Notes history' section showing two entries. The first entry is dated 'Mon, May 18 2020, 10:37 pm' by 'Ruth Lee' with the text 'Brian lost his job.' The second entry is dated 'Mon, May 18 2020, 3:54 pm' by 'Ruth Lee' with the text 'Brian is a great participant.' Green callout boxes with numbers 1 and 2 point to the 'New note field' and the 'Notes history' section respectively.

The components are as follows:

1. New note field
2. Notes history

Notes are ordered by the time they were added, with the newest notes at the top.

Note History

An individual note in the note history looks like this:

This diagram shows a single note entry from the history. It consists of three parts: a timestamp 'Mon, May 18 2020, 3:54 pm' (labeled 1), the note content 'Brian is a great participant.' (labeled 3), and the author's name 'Ruth Lee' (labeled 2).

The components are as follows:

1. The time the note was written
2. The author of the note
3. The note content

Adding a Note

To add a note, type the note into the *Enter a note* field and click *Add note*.

Participant History

The history section contains a list of all updates made to a participant record, including record creation, updating fields, changing status, and moving from the new applications list to the participant database. Each history event lists what type of update it was, the user who made the update, and the time the update was made. If the update included changed field data, the history even lists what fields were changed as well as their values before and after the change.

The screenshot shows the 'Pathfinder Youth Centre Society Participant Database' interface. On the left is a sidebar with a list of tabs: Ruth Lee, Back, Basic Information, Program Information, Employment Equity, Medical Information, Financial Information, Current Situation, Questions, Notes, and History (which is highlighted in green). The main content area is titled 'Participant Details - History' and shows a list of updates for 'Brian Firkus'. The updates are as follows:

- Note added** (Ruth Lee, Mon, May 18 2020, 10:37 pm)
- Participant record updated** (Ruth Lee, Mon, May 18 2020, 8:38 pm)
 - Fields changed:
 - Table with 3 columns: Field, Previous value, Updated value
 - Row 1: City, None, Surrey
- Note added** (Ruth Lee, Mon, May 18 2020, 3:54 pm)
- Participant record updated** (Ruth Lee, Mon, May 18 2020, 3:41 pm)
 - Fields changed:
 - Table with 3 columns: Field, Previous value, Updated value
 - Row 1: Birthdate, 1995-06-22, 1990-06-22

This block shows a zoomed-in view of the 'Participant record updated' history item with four numbered callouts:

- 1**: Points to the event description 'Participant record updated'.
- 2**: Points to the username 'Ruth Lee'.
- 3**: Points to the timestamp 'Mon, May 18 2020, 8:38 pm'.
- 4**: Points to the 'Updated value' column in the 'Fields changed' table, specifically the value 'Surrey' for the 'City' field.

The components are as follows:

1. Update event description
2. Username of the staff member who made the update
3. Timestamp of the update
4. Updated fields

Note: If no fields were changed (e.g. if the update to the record was to add a note), the *Fields Changed* section will not appear on that history item.

Participant Record Actions – View mode

The action buttons seen in the top right corner of the Participant Detail view will change depending on status the participant record has.



PENDING



APPROVED



DECLINED



ARCHIVED



Edit

Changes the viewing mode from viewing to editing, allowing the user to update participant data. Participant records in any status except *Archived* can be edited.



Approve

Prompts the user to enter the participant's government-issued confirmation number and then changes the participant record to *Approved* status. Participant records in *Pending* or *Declined* status can be approved.

Enter confirmation number

To approve this participant, please enter a confirmation number:

Confirmation number

CANCEL APPROVE



Decline

Changes the participant record to *Declined* status. Participant records in *Pending* or *Approved* status can be declined.



Archive

Archives the participant record, separating it from the main list of active participants. The record can still be found by clicking on the *Archived* tab in the list view navigation drawer. Participant records in any status other than *New* and *Archived* can be archived.



Restore

Restores the archived participant record, returning it to the main list of active participants. Only Archived participant records can be restored. When the record is restored, its status changes to what it was before it was archived.




Delete

Deletes a participant record forever. Only Archived records can be deleted.

Warning: If you delete a participant record, it cannot be recovered.

Editing a participant record

Participant records with any status except for *Archived* can have their data updated. Click on the edit  icon while in viewing mode to switch to editing mode.

The screenshot shows the 'Edit participant details - Basic Information' form for 'Brian Firkus'. The form is titled 'Pathfinder Youth Centre Society Participant Database' at the top. On the left, there is a navigation menu with 'Admin' at the top, followed by 'Back', and then a list of categories: 'Basic Information' (highlighted with a green box and labeled '1'), 'Program Information', 'Employment Equity', 'Medical Information', 'Financial Information', 'Current Situation', and 'Questions'. The main form area contains various input fields: 'Given name(s) *' (Brian), 'Last name *' (Firkus), 'Street address', 'City' (Surrey), 'Province' (dropdown), 'Postal code', 'Time lived here', 'Home phone *' ((604) 123-4567), 'Cell phone *', 'Best number to call:' (radio buttons for Home and Cell), 'Email address *', 'Date of Birth *' (yyyy-mm-dd), 'Emergency contact 1' (name and relationship), and 'Home phone', 'Work phone', and 'Cell phone' at the bottom. In the top right corner, there are checkmark and X icons (labeled '3') and a 'PENDING' button. A green box labeled '2' highlights the main form fields. A green box labeled '1' highlights the navigation menu.

The components are as follows:

1. Participant record navigation
2. Participant record fields
3. Participant record actions

Participant Record Actions – Edit mode

While in editing mode, there are two actions that the user can take.



Confirm

Confirm editing and save any changes made to the participant record's fields.

Note: Given name(s), last name, one method of contact (phone or email), date of birth, and social insurance number are all required fields and must have data in them in order to save the participant record.




Cancel

Cancel editing and discard any changes made to the participant record.

Creating a participant record

To create a new participant record, click on the + button in the bottom right corner of the list view.

Aug 17, 1998	New Westminster	Apr 13, 2020
Jul 8, 2001	Delta	Mar 12, 2019
Rows per page: 20 ▾ Page 1 < >		
Create new participant record 		

This opens up the Create participant record interface.

The components are as follows:

1. Create record navigation
2. Create record fields
3. Create record actions

Participant Record Actions – Create mode

While in participant record creation mode, there are two actions that the user can take.



Confirm

Confirm and create a new participant record, adding it to the database. The record is initially set to *Pending* status.

Note: Given name(s), last name, one method of contact (phone or email), date of birth, and social insurance number are all required fields and must have data in them in order to save the participant record. All other fields are optional.



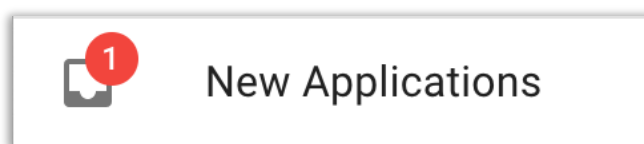
Cancel

Cancel participant record creation and return to the participant list view.

New Applications

When a potential participant submits a new application through the web form, you will be able to view it here. After ensuring a new application does not contain duplicate, spam, or otherwise invalid content, you can save it to the participant database.

The New Applications section of the navigation bar will show a badge indicating the number of new applications to be processed, if there are any.



The sort, search, and pagination functions for the New Applications list view work the same way as they do for the Participants List View (see details on page 6). There is no Add button on the New Applications page, as it is only for processing applications that come in through the web form. Participants that come in through other channels should be added from the main Participants screen.

Processing a New Application

When you click on a new application's entry in the table, you will see the new application detail page:

Pathfinder Youth Centre Society Participant Database

Ruth Lee

[← Back](#)

Basic Information

Program Information

Employment Equity

Medical Information

Financial Information

Current Situation

Questions

Notes

History

Viewing participant record - Basic Information

Chung Tsui

NEW

GIVEN NAME(S)	LAST NAME	CONFIRMATION NUMBER
Chung	Tsui	None
STREET ADDRESS		CITY
4707 Robson St		Vancouver
PROVINCE	POSTAL CODE	TIME LIVED AT ADDRESS
British Columbia	V6B 3K9	None
HOME PHONE	CELL PHONE	BEST NUMBER TO CALL
None	(604) 979-6047	None
EMAIL	BIRTHDATE	
None	Nov 5, 1994	
EMERGENCY CONTACT 1 - NAME		EMERGENCY CONTACT 1 - RELATIONSHIP
None		None
EMERGENCY CONTACT 1 - HOME PHONE	EMERGENCY CONTACT 1 - WORK PHONE	EMERGENCY CONTACT 1 - CELL PHONE

Much of the functionality on this page works like that of the Participant Detail View (see instructions on page 8). However, records in the New Application view cannot be approved, declined, or archived. The actions available for a new application are:



Edit

Changes the viewing mode from viewing to editing, allowing the user to edit the application (see the Edit section of Participant Detail View on page 12).



Accept and Save

To ensure an applicant does not already exist in the main database, use the search function of the Participants page (see instructions on page 6) to search for the applicant's SIN. If there are no results, the application can be processed. Click the Accept and Save button in the top right corner to save the application. The applicant will then appear in the Participants page with a Pending status.



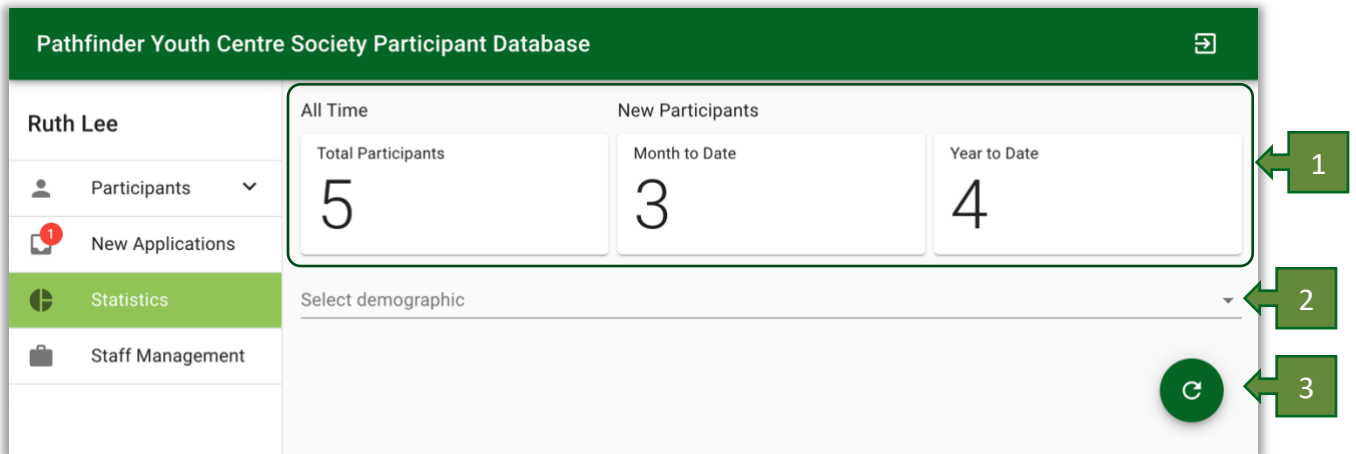
Discard Submission

If an applicant already exists in the main database or if the application is spam or otherwise invalid, click the Discard Submission button. This will permanently delete the application.

Warning: If you discard an application, it cannot be recovered.

Statistics

The statistics screen is where you can get details about participant demographics and barriers. When you first navigate to the page, you will see a count of total participants, as well as the number of new participants this month to date and this year to date.

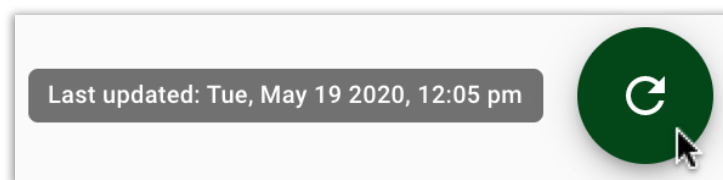


The components are as follows:

1. Overall participant counts
2. Demographic selection
3. Refresh button

Refreshing Statistics

The statistics view does not refresh automatically, as refreshing creates a lot of traffic on the database, which can lead to an increase in database costs. When you mouse over the refresh button, you can see the last time the statistics were updated.



When you click the refresh button, you will see a confirmation window appear, confirming that you want to refresh the data. This may take a few moments, especially as the size of the participant collection increases.

Warning: To avoid increasing database costs, it is not recommended to update statistics more than once per day.

Saving Participant Data Locally

When you refresh the statistics, you will see a dialog asking if you would like to save a local copy of the database. If you select “yes,” you will download a CSV (comma-separated values) file containing all Participants that have Pending, Accepted, or Declined status. The CSV file can be opened in any spreadsheet program (e.g. Microsoft Excel).

	A	B	C	D	E	F	G	H	I	J	K
1	Given name(s)	Last name	Confirmation number	Street address	City	Province	Postal code	Time lived at address	Home phone	Cell phone	Best number to call
2	Heng	Lei			Burnaby					1234567890	
3	Cameron	McClelland		432 Hastings Street	Vancouver	British Columbia	V6C 1B4	2 years		6043391850	Cell
4	first	last								1234567890	
5	Gabrielle	McDonnell	3982912		New Westminster						
6	Aidan	Nguyen			Delta				1234567890		

Viewing Statistics by Demographic

To select a demographic to view statistics for, click the “Select Demographic” dropdown and select the demographic you want to view by. The information for that demographic will appear below the dropdown.

Select demographic

Gender

Male

Total Participants

Percentage

2

40%

Month to Date

Percentage

1

33%

Year to Date

Percentage

1

25%

Female

Total Participants

Percentage

1

20%

Month to Date

Percentage

0

0%

Year to Date

Percentage

1

25%

Other

Total Participants

Percentage

2

40%

Month to Date

Percentage

2

67%

Year to Date

Percentage

2

50%

Staff Management

Admin users can access the Staff Management page. From here, you can create, edit, and delete staff, as well as send staff a password reset email.

Pathfinder Youth Centre Society Participant Database

Ruth Lee

Participants

New Applications

Statistics

Staff Management

Staff

Search

Name ↑	Email	Role	Actions
Admin	test@test.com	admin	
Allen	allen@gmail.com	admin	
Bob	bob@gmail.com	staff	
Charlie	charlie@gmail.com	staff	
Ruth Lee	ruth@pycs.com	admin	

Rows per page: 20 Page 1

+

The components are as follows:

1. Add new user button
2. Actions for interacting with user entries (edit user account, send reset password email, delete user account)

The sort, search, and pagination functions for the New Applications list view work the same way as they do for the Participants List View (see details on page 6).

User Actions



Edit

Edit the user's name or role. You cannot change your own role.

Note: Email cannot be edited as it is used for user authentication. If you have entered the user's email incorrectly, you must delete their account and create a new one.



Reset Password

Send an email to the user with a link to reset the password for their account.



Delete

Delete user, preventing them from logging into the database. You cannot delete your own account.

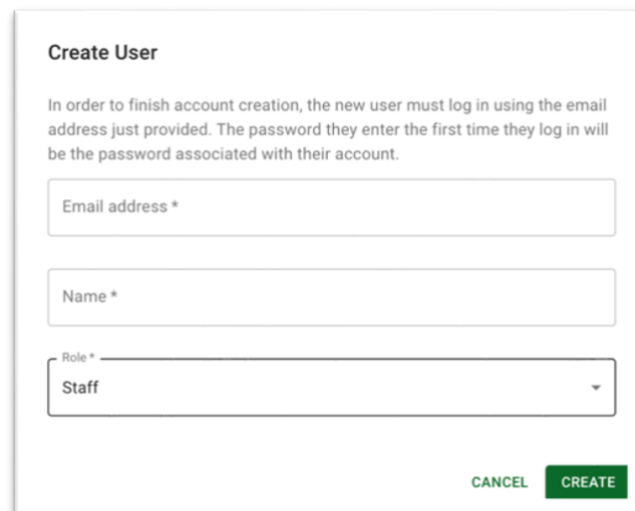
Note: In order to protect the security of the information in the database, it is important to delete user accounts for staff who no longer need access.

User Roles

There are two roles available to assign to users: admin and staff. An admin user can access the Staff Management panel and create, modify, and delete users, as well as being able to access all other features of the application. A staff user can access all features except for Staff Management.

Adding a New User

To add a new user, click on the + button in the bottom right corner of the page. A dialog will appear:



The 'Create User' dialog box contains the following elements:

- Title:** Create User
- Instructions:** In order to finish account creation, the new user must log in using the email address just provided. The password they enter the first time they log in will be the password associated with their account.
- Fields:**
 - Email address *
 - Name *
 - Role * (dropdown menu with 'Staff' selected)
- Buttons:** CANCEL and CREATE

Enter the email address the user will use to sign in, as well as their name and whether they will be a Staff or Admin user, and then click Create.

Note: You cannot have two users with the same email address. If you attempt to create a user with an email address that already exists in the users list, you will see an error.

Completing Enrollment

To complete enrollment, have the new user go to the login screen and sign in using their email address. The password they enter the first time they sign in will be the password for their account.

Troubleshooting

Problem	Possible Cause	Recommended Course of Action
An alert message pops up every time you log in	You are using an obsolete browser	Update your browser or switch to a more modern one, like Chrome or Firefox.
Seeing error messages when trying to submit a form or save a record	Mandatory fields in the form have not been completed	Check the form again and ensure all mandatory fields are filled out. Fields with problems will be highlighted in red. Be sure to check other pages of the record if you don't see the problems.
Statistics counts appear to exclude records	Some participants are archived or are still in New state	Archived records and new applications are not included in statistics counts. Any records you want included should be restored (if archived) or saved (if new).
You aren't able to send a password recovery email	Signup was not completed or user's email address is incorrect	Follow the steps for Completing Enrollment on page 21. If the email address is incorrect, delete the account and recreate it. No participant information is lost by deleting a user.