

PennWest Military and Veteran Student Success Database

USER MANUAL

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SYSTEM CAPABILITIES OVERVIEW

The PennWest Military and Veteran Student Success Database will provide tools for managing VA benefit information effectively. The system will enable staff to track certifications in a centralized and accessible way, offering robust filtering options by aid type, aid balance, and certification status. Staff will have access to customizable email templates to streamline communication with students, saving time and ensuring consistency in messages.

The database will allow for detailed reporting, including information such as student names, IDs, contact details, aid types, and certification statuses. These reports will support the department in assessing certifications and ensuring compliance with VA requirements. Through these features, the database will improve operational efficiency and contribute to a more seamless and supportive experience for PennWest's military and veteran student community.

Accessing the Website

(All examples within the manual use the Microsoft Edge Browser)



1. Click on your browser's address bar.
2. Type <https://devweb1.cis.pennwest.edu/~vafinaid/> into the address bar.
3. Press the **Enter** or **Return** key.
4. This will now take you to the **Login** Screen.

A screenshot of the 'PennWest Financial Aid Veteran's Database' login page. At the top, a status bar says '*** Database Connection Status: connected ***'. Below this is a dark blue header with the PennWest logo and the text 'PennWest Financial Aid Veteran's Database'. A navigation bar contains links: 'Home', 'Search', 'New Record', 'Email', 'Reports', 'Admin', 'Login', and 'Logout'. The main content area is light blue and features a white 'Login' form. The form has two input fields labeled 'Username' and 'Password', a dark blue 'Login' button, and a link that says 'Don't have an account? Ask an Admin to make one for you!'. At the bottom of the page is a dark blue footer with the text 'Pennsylvania Western University'.

5. If you are not already registered, request an account from an **Admin**.

Registration

Create a New User

User/Staff ID:

Username:

Password:

Confirm password:

First Name:

Last Name:

Email:

Role:

Submit

Manage Users

Staff ID	Username	Role	Action
54587	andrew	Admin	Make Inactive
555	JGuffy	Admin	Make Inactive
abc	abc123	Admin	Make Inactive
menon	menon	Admin	Make Inactive

On the registration page, an **Admin** has the ability to create an account, or update an account's roles.

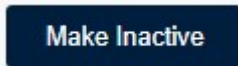
- In order to login and access the database, the user must first have an **Admin** register their account by entering their details:
 - Staff ID:** Enter your staff ID in the white box.
 - Username:** Enter a username for yourself in the white box.
 - Password:** Enter a password of your choosing in the white box.
 - Confirm Password:** Re-enter your password in the white box.
 - First Name:** Enter your first name.
 - Last Name:** Enter your last name.
 - Email:** Enter your email.
 - Role:** Click the drop-down menu to choose between **Support Staff** or **Admin**.
- After entering all of your or the **Support Staff's** information, click the blue **Submit** button.

Submit

- Proceed to the **Login** screen.

In order to update an account's role:

1. Click the blue **Make Inactive** button under the **Action** column in the **Manager Users** table. After clicking this, until a new role is selected, the account will not be able to login.




2. To change the roles after making an account inactive, click one of the following blue buttons under the **Action** column in the **Manager Users** table:



- **Make Admin:** Gives the account all of the powers of an **Admin**.
- **Make Support Staff:** Re-activates account without giving **Admin** powers.

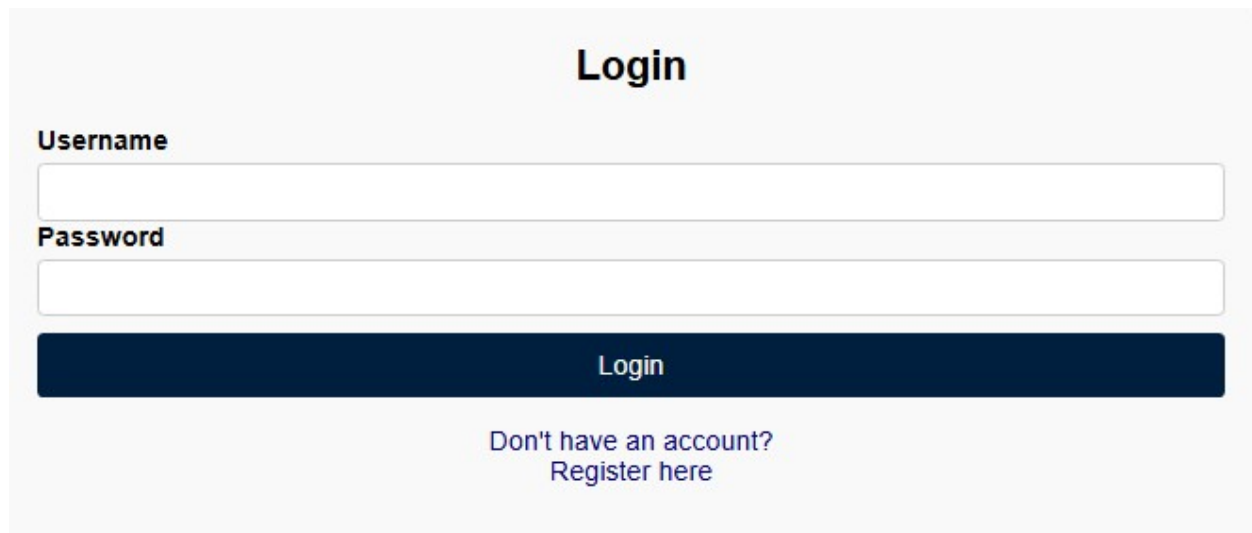
Login



The screenshot shows the top of the website. On the left is the PennWest logo with the tagline 'Helping you get ahead'. To its right is the title 'PennWest Financial Aid Veteran's Database'. Below these is a dark blue navigation bar with white text links: Home, Search, New Record, Email, Reports, Admin, Login, and Logout.

To access the website's functionality, the user will need to first login to the system.

1. On the navigation bar, at the top of the webpage click on the text **Login**.



The screenshot shows the login page. At the top, the word 'Login' is centered in a large, bold, black font. Below it, the label 'Username' is followed by a white text input box. Below that, the label 'Password' is followed by another white text input box. At the bottom of the form is a dark blue button with the word 'Login' in white. Below the button, the text 'Don't have an account? Register here' is displayed in a smaller, blue font.

2. On this screen, click on the white box under the **Username** text.
3. Enter your username.
4. Click on the white box under the **Password** text.
5. Enter your password.
6. Click on the dark blue button with the text **Login**.
7. You should now be taken to the home page.

*** Database Connection Status: connected ***



PennWest Financial Aid Veteran's Database

[Home](#) [Search](#) [New Record](#) [Email](#) [Reports](#) [Admin](#) [Login](#) | [Logout](#)

Select an Action

[Search](#)

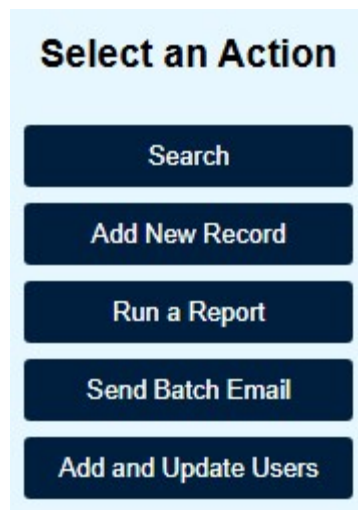
[Add New Record](#)

[Run a Report](#)

[Send Batch Email](#)

Home Page / Navigation Bar

To access the system's functionalities, one can either go to the **Home** page, that the user is redirected to after logging in, or by using the **Navigation Bar** at the top of all pages.



From here, the user can access: (Home Page Title / Navigation Bar Title)

- **Home:** Quick access to the home page from any other page on the website.
- **Search:** Allows user to search for a specific record (page 9).
- **Add New Record / New Record:** Allows the user to input the information of a student into the database (page 14).
- **Email / Send Batch Email:** Allows user to send an email to selected student(s) / Save a new email template (page 15).
- **Reports / Run a Report:** Allows user to search for one or more student with matching the user's chosen criteria (page 16).
- **/ Admin:** Allows user to see a full list of all aid recipients, view their records, delete their records, and reset all certifications (page 19).
- **Logout:** Exit current session (page 24).
- **Add and Update Users:** Only available to **Admins**. Takes user to the **Registration** page to add new users or update existing accounts.(page 5).

Search

Search Students

☐ Search by Student Name:
 First Name:
 Last Name:

☐ Search by Student ID:

☐ Search for Non-Certified Students for Current Semester

☐ Search by Benefit Balance:

☐ Search by Benefit Type:

To use the search function:

1. Begin By selecting your search parameter by clicking the small white circle. The options are:
 - **Search By Student Name:** Allows user to search for a student based on their first and/or last name
 - **Search by Student ID:** Allows user to search based on a student's ID
 - **Search for Non-Certified Student for Current Semester:** Allows user to search for students who are not certified for the current semester
 - **Search by Benefit Balance:** Click the drop-down menu to choose between **3 months or less, 3-6 months, 6-9 months, More than 9 months.**
 - **Search by Benefit Type:** Click the drop-down menu to choose between **Montgomery GI Bill, Post 9/11, VR&E.**
2. If using **Search By Student Name** or **Search by Student ID**, click on the white box and enter your search parameter
3. Click the **Search** button under search parameters

4. If there are student's that match your search parameters, you should see a screen similar to this:

Search Results

Student ID	Last Name	First Name	Certified	Benefit Months	Benefit Days	Benefit Type	Select All <input type="checkbox"/>
123456	Smith	Sarah	N	8	12	Post 9/11	<input type="checkbox"/>
2222	Person	Gal	Y	3	1	Post 9/11	<input type="checkbox"/>
333333	Brown	Brandon	N	32	9	Post 9/11	<input type="checkbox"/>
444	Person	Guy	Y	1	1	Post 9/11	<input type="checkbox"/>
55555	Doe	Jane	N	5	7	Post 9/11	<input type="checkbox"/>

View Student Record

Email Student(s)

New Search

5. From this page you can:
 - **View Student Record:** Allows user to view the results of single student.
 - **Email Student(s):** Allows the user to email selected student (page 21).
 - **New Search:** Allows the user to start a new search.
6. To view a student's record, select the student that you want to see the records of by clicking on the white square in the **Select All** column in the row of the specific student.
7. Click the blue **View Student Record** button.

View Student Record

8. You will be taken to a page similar to this:

The screenshot shows a web interface for managing student information. It contains the following fields and labels:

- Student ID:** 123456
- First Name:** Sarah
- Last Name:** Smith
- Address:** 123 Main St.
- City:** Center
- State:** VA
- Zip Code:** 33445
- Phone Number:** 333-992-2222
- Email:** sarah@yahoo.com
- Benefit Type:** Post 9/11
- Certification Status:** Certified (as of 04-10-2025)
- Benefit Balance:**
 - Months: 8 Days: 12
- Certification Dates:**
 - 03-12-2025
- Emails Sent to Student:**
 - Subject: Test4 | Sent: 04-07-2025 02:53:16 PM | Sent by: test

At the bottom, there are two dark blue buttons:

- Email Student(s)**
- Update Student**

9. You now have two options:

- **Email Student:** Email the chosen student through your computer's email application.
- **Update Student:** Update the chosen student's information.

10. Click the option that you wish to complete. If do not want to select either option, press the **Home** button in the navigation bar to be taken back to the home page.

Update

(To access this section, please complete the **Search** section)

To change a students information in the database:

1. After selecting the **Update Student** button, the page should appear similar to this:

Update Student Record

Student ID:

First Name:

Last Name:

Address:

City:

State:

Zip Code:

Phone Number:

Email:

Benefit Balance (Months):

Benefit Balance (Days):

Benefit Type:

Certification Status:

Certification Date:

2. The following options can be edited:

- **Student ID:** Enter student ID in the white box.
- **First Name:** Enter student's first name in the white box.
- **Last Name:** Enter student's last name in the white box.
- **Address:** Enter student's address in the white box.
- **City:** Enter student's city in the white box.
- **State:** Enter student's state as two letters in the white box.
- **Zip Code:** Enter student's zip code in the white box.
- **Phone Number:** Enter student's phone number without dashes in the white box.

- **Email:** Enter student's email in the white box.
 - **Benefits Balance (Months):** Enter aid months left in white box.
 - **Benefits Balance (Days):** Enter aid days left in the white box.
 - **Benefit Type:** Click the drop-down menu to choose between **Montgomery GI Bill**, **Post 9/11**, **VR&E**, or **INACTIVE**, or the ability to add a new benefit type.
 - **Certification Status:** Select certification box by clicking on the drop-down menu and selecting **Yes** or **No**.
 - **Certification Date:** Enter the certification date by either typing it in manually on the **mm/dd/yyyy** or clicking the small calendar button and selecting the date on the calendar.
3. Once you have made your changes, click on the blue **Update Student** button near the bottom of the page to save any changes to the database.

Add New Record

Add New Student Record

Student ID *:

First Name *:

Last Name *:

Address:

City:

State:

Zip Code:

Phone Number:

Email *:

Balance of benefit months:

Balance of benefit days:

Benefit Type: -- Select Benefit Type --

Certification Status: Select certification status

Certification Date: mm/dd/yyyy

Submit

* Required fields

The **New Record** page allows the user to add a new student to the database:

- To add a new record, complete each of the fields labeled with a red asterisk *.
 - Student ID ***: Enter student ID in the white box.
 - First Name ***: Enter student's first name in the white box.
 - Last Name ***: Enter student's last name in the white box.
 - Address**: Enter student's address in the white box.
 - City**: Enter student's city in the white box.
 - State**: Enter student's state as two letters in the white box.
 - Zip Code**: Enter student's zip code in the white box.
 - Phone Number**: Enter student's phone number without dashes in the white box.
 - Email ***: Enter student's email in the white box.
 - Balance of benefit months**: Enter aid months left in white box.
 - Balance of benefit days**: Enter aid days left in the white box.
 - Benefit Type**: Click the drop-down menu to choose between **Montgomery GI Bill**, **Post 9/11**, **VR&E**, or **INACTIVE**, or the ability to add a new benefit type.
 - Certification Status**: Select certification box by clicking on the drop-down menu and selecting **Yes** or **No**.
 - Certification Date**: Enter the certification date by either typing it in manually on the **mm/dd/yyyy** or clicking the small calendar button and selecting the date on the calendar.
- To enter the student's information into the database, press the blue **Submit** button.

Submit

Email / Send Batch Email

Select Certification Status or Aid Balance

Certification Status: ▼

Benefit Balance: ▼

Benefit Type: ▼

Search

- To send a batch email, begin by searching for students:
 - Certification Status:** Click the drop-down menu to choose between **Certified** or **Not Certified**.
 - Aid Balance:** Click the drop-down menu to choose between **3 months or less, 3-6 months, 6-9 months, More than 9 months**.
 - Search by Benefit Type:** Click the drop-down menu to choose between **Montgomery GI Bill, Post 9/11, VR&E**.
- After making your selection, press the blue **Search** button.

Search

- You should see a page similar to below:

Select Certification Status or Aid Balance

Certification Status: ▼

Benefit Balance: ▼

Benefit Type: ▼

Search

Search Results

Student ID	Last Name	First Name	Email	Select All
333333	Brown	Brandon	brown@gmail.com	<input type="checkbox"/>
Y7777	Dennison	Darla	dennison@gmail.com	<input type="checkbox"/>

Add Selected to Email

- Make your selection of students by clicking on the white box in the final column of the **Search Results**, or by clicking the **Select All** box
- After making your selection, press the blue **Add Selected to Email** button
- You will be taken to the email screen.
Please proceed to page 21 complete the email process.

Reports / Run a Report

Report Parameters

Start Date:

mm/dd/yyyy

End Date:

mm/dd/yyyy

Certification Status:

All

Benefit Balance (Months):

All

Benefit Type:

All

Generate Report

- To generate a report, complete the following fields:
 - Start Date:** Enter the start date by either typing it in manually on the **mm/dd/yyyy** or clicking the small calendar button and selecting the date on the calendar.
 - End Date:** Enter the end date by either typing it in manually on the **mm/dd/yyyy** or clicking the small calendar button and selecting the date on the calendar.
 - Certification Status:** Click the drop-down menu to choose between **All**, **Certified**, and **Not Certified**.
 - Aid Balance:** Click the drop-down menu to choose between **3 months or less**, **3-6 months**, **6-9 months**, **More than 9 months**.
 - Search by Benefit Type:** Click the drop-down menu to choose between **Montgomery GI Bill**, **Post 9/11**, **VR&E**.
- After making your selection, press the blue **Generate Report** button.

Generate Report

3. After selecting the **Generate Report** button, the page should appear similar to this:

Report Results

Report Parameters:

Date Range: to Certification Status: all

Student ID	Last Name	First Name	Email	Certification Status	Benefit Balance	Benefit Type	Select All <input type="checkbox"/>
0000	none	none	none@none.com	Certified	8 Months, 10 Days	VR&E	<input checked="" type="checkbox"/>
123456	Smith	Sarah	sarah@yahoo.com	Not Certified	8 Months, 12 Days	Post 9/11	<input checked="" type="checkbox"/>
2211445	Smith	Sarah	ssmith@gmail.com	Certified	6 Months, 23 Days	VR&E	<input checked="" type="checkbox"/>
2222	Person	Gal	gal@person.com	Certified	3 Months, 1 Days	Post 9/11	<input checked="" type="checkbox"/>
333333	Brown	Brandon	brown@gmail.com	Not Certified	32 Months, 9 Days	Post 9/11	<input checked="" type="checkbox"/>
444	Person	Guy	guy@person.com	Certified	1 Months, 1 Days	Post 9/11	<input checked="" type="checkbox"/>
55555	Doe	Jane	doejane@gmail	Not Certified	5 Months, 7 Days	Post 9/11	<input checked="" type="checkbox"/>
666666	Test	Lady	testtest@test.com	Not Certified	9 Months, 6 Days	VR&E	<input checked="" type="checkbox"/>
Y7777	Dennison	Darla	dennison@gmail.com	Not Certified	42 Months, 18 Days	Montgomery GI Bill	<input checked="" type="checkbox"/>
Y8877334	Smith	Sarah	ssmith@yahoo.com	Certified	6 Months, 29 Days	VR&E	<input checked="" type="checkbox"/>

Email Selected Students

Print Results

4. On this page, there are the following options
- **Email All Students:** By clicking this button below the report, you will be taken to the email screen with all of the students listed in the report in
 - **Print Results:** Print all listings to a .pdf file.

Admin

Admin Page

Reset All Certifications to Not Certified

Search by Student Last Name:

Search

Sort By:

Last Name ▼

Order:

Ascending ▼

Sort

Student ID	First Name	Last Name	Certification Status	Benefit Type	Last Email Sent	View Student Record	Delete
333333	Brandon	Brown	No	Post 9/11	04-07-2025	View Record	Delete
Y7777	Darla	Dennison	No	Montgomery GI Bill	04-08-2025	View Record	Delete
Y7777	Darla	Dennison	Yes	Montgomery GI Bill	04-08-2025	View Record	Delete
55555	Jane	Doe	No	Post 9/11	N/A	View Record	Delete
0000	none	none	Yes	VR&E	N/A	View Record	Delete
2222	Gal	Person	Yes	Post 9/11	N/A	View Record	Delete
444	Guy	Person	Yes	Post 9/11	N/A	View Record	Delete
2211445	Sarah	Smith	Yes	VR&E	04-08-2025	View Record	Delete
Y8877334	Sarah	Smith	Yes	VR&E	04-08-2025	View Record	Delete
123456	Sarah	Smith	No	Post 9/11	04-07-2025	View Record	Delete
666666	Lady	Test	No	VR&E	04-08-2025	View Record	Delete

- The admin page gives the user the ability to change student details by:
 - Reset All Certified Certifications to Not Certified:** By clicking the blue button labeled **Reset All Certified Certifications to Not**

- Certified, ALL** students in the database's certification status will be set to **Not Certified**.
- **View Record:** By clicking the red button labeled **View Record**, the user is able to view the record of the specific student.
 - **Delete:** By clicking the red button labeled **Delete**, this student's information will be permanently deleted from the database.
- WARNING: this CANNOT be undone.**
2. The user also has the ability to sort specific students:
- **Search by Student Last Name:** Allows the user to search by the last name of a student by clicking on the white box with the text **Enter student last name**.
 - **Sort By:** Allows user to sort students by **Last Name, Benefit Type**, or **Last Email Sent**.
 - **Order:** Allows user to choose if chosen sorting variable is in an **Ascending** or **Descending** order.

Email

Select Certification Status or Aid Balance

Certification Status: ▼

Benefit Balance: ▼

Benefit Type: ▼

Search

By selecting the **Email** text on the navbar, the user is taken to the selection page. Before an email can be written and sent, first the user must select students:

1. Select the parameters to select the students by:
 - **Certification Status:** Select certification box by clicking on the drop-down menu and selecting **Yes** or **No**.
 - **Benefit Balance:** Click the drop-down menu to choose between **3 months or less, 3-6 months, 6-9 months, More than 9 months**.
 - **Benefit Type:** Click the drop-down menu to choose between **Montgomery GI Bill, Post 9/11, VR&E**.
2. Click the blue **Search** button after making your selections

Search

3. You will be taken to the **Search Results** page, which will look similar to this:

Select Certification Status or Aid Balance

Certification Status: ▼

Benefit Balance: ▼

Benefit Type: ▼

Search

Search Results

Student ID	Last Name	First Name	Email	Select All
Y7777	Dennison	Darla	dennison@gmail.com	<input checked="" type="checkbox"/>

Add Selected to Email

4. From the **Search Results** page, if the user needs to change their search parameters, they are able to change their options and click the blue **Search** button again

5. If the user is happy with their results, then they can select all of the students they wish to by clicking the white box at the end of the row for each student, or [by](#) clicking the white box under **Select All** to choose every student listed.
6. Once student(s) are selected, click the blue **Add Selected to Email** to proceed to the email screen.

Sending Emails

After the student(s) have been chosen, you will be taken to the email screen:

Email Students

Selected Student(s):

Darla Dennison (dennison@gmail.com)

Select Template: -- Create New Template -- ▼

Subject:

Email Body:

Save as Template Save to Record(s) Send Email Back to Search

1. Make sure that all of the students that you selected are listed in the **Selected Student(s)** section.
2. Next, click on the **Select Template** dropdown menu and select your wanted email template, or select **-- Create New Template --** if you wish to create and save a new template. *-Note: Templates can be used to save the Subject and Body of an Email for future use.-*
3. If selecting **-- Create New Template --**:
 - Write the subject of the email in the white text box below **Subject:.**
 - Write the body of the email in the white text box below **Email Body:.**
 - Once both text boxes have been completed, click the blue **Save as Template** button to save the paired subject and email body to the database for later use.
4. After choosing your template, you have three options
 - **Save to Record(s)**: Saves email information.
 - **Send Email**: Sends email to all selected students.
 - **Back to Search**: Allows user to return to the email search function.

Logout



When the user is finished with their tasks within the database, clicking the **Logout** text in the Navigation Bar will log out the user.

User Acceptance Testing (UAT) - PennWest Military and Veteran Student Success Database

Welcome to the User Acceptance Testing Process

This part of the manual outlines the User Acceptance Testing (UAT) procedures for the PennWest Military and Veteran Student Success Database. UAT makes sure that features meet user's requirements, function as the developer intended, and are intuitive to use. Users are asked to explore the database and system and complete each task as thoroughly as possible, making sure that any bugs are documented, and any suggestions written.

The UAT should be conducted using a variety of devices (desktop, laptop, tablet) and browsers (Chrome, Edge, Firefox, Safari, Opera, etc.).

Tester Information

Field	Input
Name	
Date	
Role (Admin/Staff/User)	
Technical Experience (highlight)	Beginner / Intermediate / Advanced
Device Used	
Operating System	
Browser Used	

SECTION 1: LOGIN FUNCTIONALITY

Test Step	Yes	No	Comments
Did the login page load quickly?			
Was the login form visible and fully loaded?			
Could you enter text into the Username field?			
Could you enter text into the Password field?			
Did the login button respond when clicked?			
Were you redirected to the Home Page after login?			
Was the interface clear and intuitive?			
When entering the incorrect credentials, did the login page reset?			

SECTION 2: HOME PAGE / NAVIGATION BAR

Test Step	Yes	No	Comments
Did the Home page load correctly after login?			
Did the Navigation Bar contain all expected links?			
Did clicking Home return you to the Home page?			
Did the navigation bar persist across all pages?			

SECTION 3: SEARCH FUNCTIONALITY

Test Step	Yes	No	Comments
Was the search page easy to understand?			
Did the radio buttons respond to clicks?			
Did the Benefit Balance dropdown display all options?			
Did the Benefit Type dropdown display all options?			
Could you input valid student name/ID values?			
Were results displayed correctly after search?			
Could you click to View Student Record?			
Did Email Student(s) open the correct page?			
Did New Search clear the current search?			

SECTION 4: VIEW / UPDATE STUDENT RECORD

Test Step	Yes	No	Comments
Did the View Student page load correctly?			
Was the Email Student option visible?			
Was the Update Student button functional?			
Did all fields pre-fill with correct data?			
Could each field be edited?			
Did dropdowns (Benefit Type, Certification Status) function properly?			
Did the calendar input for Certification Date function correctly?			
Did the Update Student button save the data?			
Was confirmation of update shown?			

SECTION 5: ADD NEW RECORD

Test Step	Yes	No	Comments
Was the New Record page accessible?			
Were required fields marked clearly?			
Could each field accept input?			
Did the Benefit Type and Certification Status dropdown's function?			
Could the Certification Date be selected from the calendar?			
Did clicking Submit save the new record?			
Was the student's completed record shown after entry?			

SECTION 6: EMAIL / BATCH EMAIL

Test Step	Yes	No	Comments
Were search filters functional?			
Did clicking Search show matching results?			
Could you select individual students or use Select All?			
Did Add Selected to Email take you to the email screen?			
Did the email screen show selected students?			
Could you select a template or create a new one?			
Could you enter subject and body for a new template?			
Was the new template saved successfully?			
Did Save to Record(s) save the email?			
Did Send Email send the email correctly?			

SECTION 7: REPORTS

Test Step	Yes	No	Comments
Did date pickers for Start and End Date function?			
Were all filter dropdowns functional?			
Did the report generate with expected results?			
Could you click Email All Students?			
Could you print results to PDF?			
Was the layout and data presentation clear?			

SECTION 8: ADMIN FUNCTIONALITY

Test Step	Yes	No	Comments
Could you access the Admin page?			
Did Reset Certifications reset all as expected?			
Could you view individual student records?			
Could you delete a student record?			
Did delete action require confirmation?			
Did Search by Student Last Name return expected results?			
Did Sort By and Order change the result order?			

FINAL COMMENTS

Please provide any general feedback, issues encountered, or suggestions for improvement:

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