Quick Start Guide

This guide is meant to help you to quickly acquaint yourself with the user interface of Active Agenda. We hope you will find it helpful. If you have comments or questions, please do not hesitate to contact us at inquiries@activeagenda.net.

Getting Started

Login Screen

As a user of your organization's installation of Active Agenda, you will have your own user name and password. This makes it possible for the software to remember your personal preferences and your permission levels.

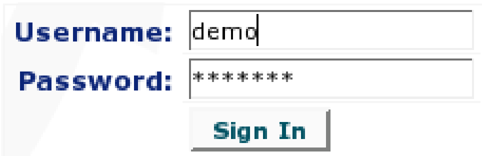


Figure 1: Login form

Dashboard Screen

The first page you see after logging in is the Dashboard. This is your “home page” within Active Agenda. The dashboard contains three drop-down screens that display your Actions (To-Do's), any new Accountabilities assigned to you, Shortcuts you establish as you use Active Agenda and charts that you add to the screen.

Figure 2: Dashboard Screen

The most visible feature on the Dashboard is the Chart display. You can create charts in any module, and send them to your dashboard. They will be displayed in real-time, using live data according to the conditions you used when creating the charts. More information is available in the Charts Screen section, below.

We will talk more about the Dashboard Screen later, since many of its features will become clear once we have explained what modules are, and how they work.

The Navigation bar

At the top of your page, you will see a blue bar that contains several navigation features. This bar will remain visible on every page other than pop-up windows.

Figure 3: The Navigation Bar

Main Menu

It all starts here! The navigation menu lets you access every module of Active Agenda. The menu opens when you place your mouse pointer over the Main Menu area at the left of the Navigation bar. The links in the navigation menu are grouped into many sub-menus, which expand when you place your mouse pointer over a menu item with an arrow indicator.

Dashboard Icon

Clicking on the *Dashboard Icon* is a quick way to return to the Dashboard screen.

Logout

Clicking on the *Logout* link will end your user session within Active Agenda. We recommend that you make a habit of logging out when you finish your session, instead of just closing your browser. Sessions that are left open will consume resources that could be better used to improve the user experience of others.

Reload

The *Reload* link provides a quick way to update the data on your page. If another user has made changes to the data you are looking at, you wouldn't know it until you reload the page. (This is simply the nature of Web-based applications.)

Exploring A Module

All modules in Active Agenda share many of the same features and screens. Once you are familiar with the workings of one module, you will be able to find your way around others quite easily.

In Active Agenda, each *module* is a separate part of the application that handles data related to a particular topic. For instance, there is one module for Hazard Reporting, and another module for Equipment. The topics of these modules are quite different, but the way you navigate them is very similar. When you work with the data in either of these modules, you will be dealing with Screens, Records, Fields, Grids, Charts and Reports.

To get to the Hazard Reporting module, move your cursor to the "Main Menu", in top left corner of your browser. As the menu opens, move your mouse pointer down to the “Communications” item in the list, and watch the corresponding sub-menu open. Clicking on the “Hazard Reporting “ item in that menu should open the List Screen of the Hazard Reporting module.

Figure 4: The Hazard Reporting List Screen

List Screen

The List screen of the Hazard Reporting module displays a list of some, or all, of the hazards that have been reported and entered into this module.

Module Introduction

Since the List screen is usually the first one that you would see in a module, we decided to display an introduction to the purpose of the module on this screen. After you have read the introduction, you can dismiss it by clicking on the button labeled “Dismiss for this module”. You can always find the same introduction in the Support Documentation.

List

The actual “list” of the List screen provides some basic information of each record. To view all the information related to a particular hazard, click on the little “page” icon ( ). This will display the View Screen for that hazard.

Since there could easily be many hundreds of hazard reports, the List screen could take a long time to download and display in your browser if all the data were to be displayed at once. By default, the List screen will display 10 records per page, and provide links to further pages. You can change the number of records displayed in a page (click on the number of rows you'd like to see), and you can also *filter* the list by applying *search conditions* to it (see Search screen).

Navigation Tabs

At the right edge of the screen, you will see what we call the "navigation tabs". These are links to other screens in this module.

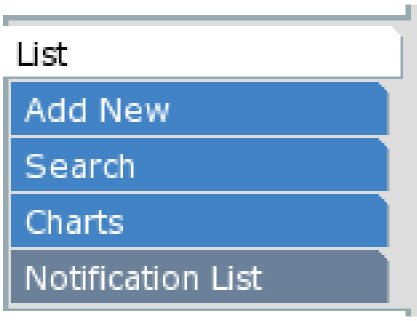


Figure 5: Navigation Tabs on a List Screen

Add New: This will allow you to enter a new hazard report. (see Edit Screen)

Search: This will allow you to filter the list of hazard reports by applying search criteria. (see Search Screen)

Charts: This will allow you to visualize the listed hazard reports as charts. (see Charts Screen)

Notification List: This will allow you to establish a list of people to be notified of hazard reports. (see Notification List Screen)

Search Filter Conditions

If you had applied filter conditions to the list (by doing a search in the Search screen), you would see a description of them in the box below the list, below the title "Search Filter Conditions". To remove the search conditions, click the link labeled "Clear Search Filter" that appears when search conditions are present.

If you are mostly interested in hazard reports of a particular kind (say, hazards reported in your own organization), you can use the Search screen to define the matching search filter conditions, and then make that search filter into a Default Filter (click on the link labeled "Make this my Default Filter"). The next time you visit the Hazard Reporting module, the default filter will be applied.

Download Data

You can download a list of hazard reports in three common formats: CSV (Comma-Separated Values), XML (Extensible Markup Language) or Microsoft Excel format. The hazard reports will reflect any search filter conditions present and contain the data displayed on the List Screen.

Icons

Above the Navigation Tabs are three icons that provide access to support resources for each module.

Discussions: Ask questions about Hazard Reporting in Active Agenda's global web forum. (see Forums)

Support Documentation: Read the "help" documentation for Hazard Reporting. (see Support Documentation)

Add Shortcut

If you would like a way to easily return to the list of the hazard reports, click on the "Add Shortcut" link, below the Navigation Tabs.

Direct Link

If you need a link directly to the page you're looking at, you can copy the link labeled "Direct Link to This Page". This can be handy when creating custom bookmarks in third-party applications, for instance.

Search Screen

The Search screen allows you to define search filter conditions for the records that are displayed in the List screen.

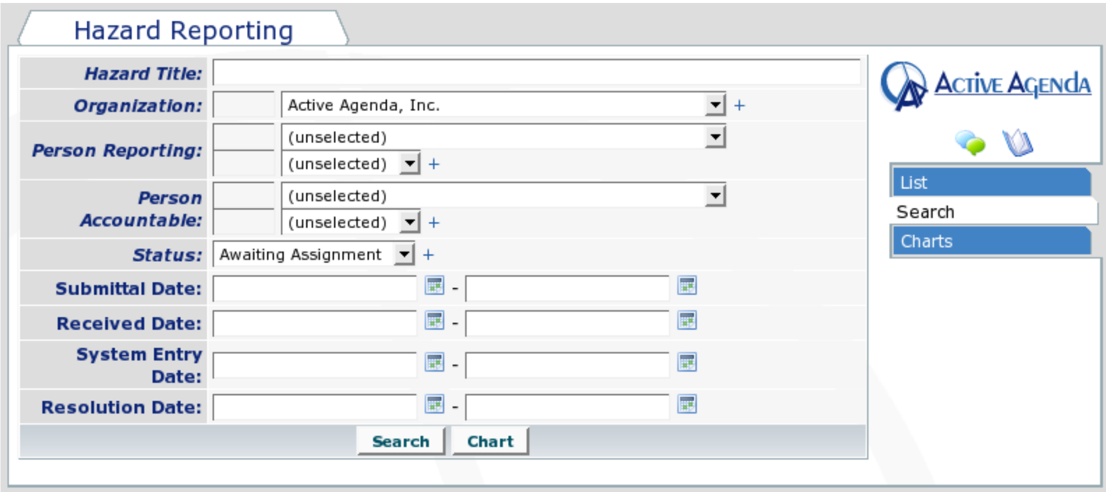


Figure 6: The Hazard Reporting Search Screen

To apply search conditions, find the field you would like to filter by, and select a value. You can do this for as many fields as you wish. Then click the Search button to return to the List screen and see the filtered list. You can also click the Chart button, in order to see charts based on the filtered hazard reports directly.

Charts Screen

In the Charts screen, you can view charts based on the data that matches any applied search filter conditions. The records that you see in the List screen are the same records that provide the data for the charts.

If you find a chart that displays something you find important, you can save it (along with any active filter conditions) to your personal dashboard. Simply click the “Save To Dashboard” link, and save.

View Screen

The View screen displays all the data of a record, a hazard report in this case. To get there, click on a “View Record” icon of a record in the List screen.

Figure 7: Top of the View Screen of a Hazard Report

The View screen does not only display the details of the hazard report itself (who reported, when was it submitted, etc.), but also related data that reside in other modules.

Where the related data can have several “items” for each hazard report, it is displayed as a sub-folder (it is meant to look like a manila folder, enclosed in the “hanging folder” that represents the hazard report).

Because one hazard report might actually describe more than one hazard, we have implemented Hazards as a sub-module of Hazard Reporting.

Figure 8: Middle of the View Screen of a Hazard Report

The Hazards sub-folder contains a list of hazards that are located in their sub-module. To see all the data related to a particular hazard, click on the icon in the row. This will open a new window, displaying the View Screen for the corresponding hazard. As you can see, there is more data in the Hazards module than what is visible in the Hazards sub-folder back in the Hazard Reporting module.

If you want to navigate from the Hazard Report View screen to the Hazards module, you can simply click on the link in the title of the Hazards folder (opens in the same window). If all you want to do is see "what other hazards there are", but want to return to the screen you're at, open Hazards in a new a new window by clicking on the icon in the tab.

As you look at the View screen, you might notice some other differences compared to the List screen we saw before. The Navigation tabs at the right are different from those on the List screen, because they provide links to Edit Screens where you can change the data of the hazard report.

The "Form" tab at the right opens the Hazard Reporting module's initial edit screen. In fact, every module of Active Agenda uses the "Form" screen as its most basic edit screen.

Edit Screens

If you click on the Form tab in the View screen described above, you should see the first of a several Edit screens in the Hazard Reporting module. You could also click the "Add New" tab in the List screen, which will open this screen with a blank form, ready to accept data for a new Hazard Report.

This "Form" screen is the primary data entry form in the module. Each field in the form is labeled with a descriptive name in the left column. If you would like to see a longer explanation of the purpose of the field, just point your mouse over the name: The description will magically pop up on the screen.

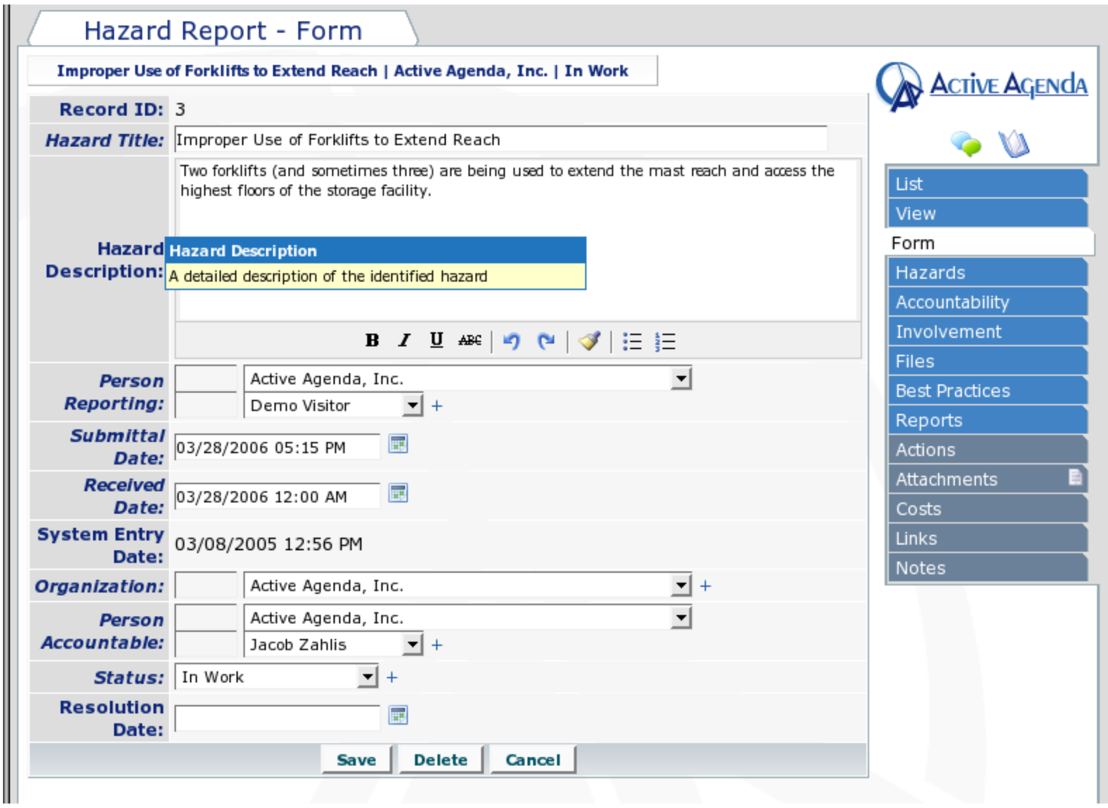


Figure 9: Editing a Hazard Report

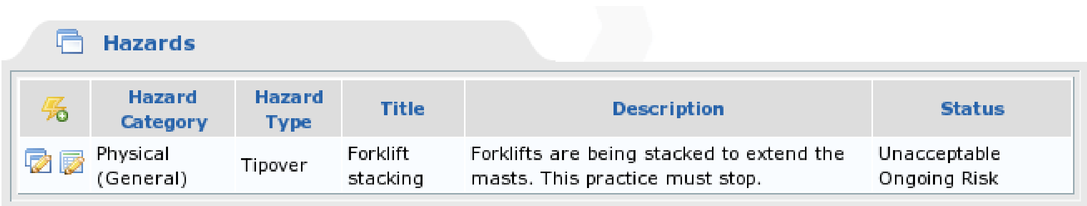
The bottom of the form contains three buttons: Save, Delete, and Cancel. The Save button will submit the data to the server, which will save it in the database. The Cancel button will return you to the View screen without saving any changes you have made.

The Delete button will not *actually* delete the Hazard Report but only *mark* it as "deleted". That means that you will not see it any more, but it can be "resurrected" by an administrator if necessary.

The subsequent Edit screens contain ways to work with the data that is stored in sub-modules of the Hazard Reporting module.

Sub-Folder Edit Screens

The top portion of the Hazard screen contains several view-only fields that are meant to describe the Hazard Report well enough for you to know which hazard report you are working with. This is true for all Edit screens within Active Agenda. Below the view-only fields, you will see a Hazards sub-folder that is similar to the one you saw on the View screen, but this one will allow you to add new hazards or edit existing ones.


Hazards

	Hazard Category	Hazard Type	Title	Description	Status
	Physical (General)	Tipover	Forklift stacking	Forklifts are being stacked to extend the masts. This practice must stop.	Unacceptable Ongoing Risk

Figure 10: Hazards Edit Grid

To add a new hazard, click the "add new" icon ( ) in the top left corner of the table in this sub-folder. You should now see a form, where you can submit some basic details about the hazard being reported. At the bottom of the form, you will find the Save and Cancel buttons. When you click Save, your browser will send the new data to the server, which will save it to the database. You will see the new hazard appear as a new row in the Hazards sub-folder.

To edit a hazard, there are two ways: The "quick" way and the "full" way. Each row in the Hazards grid has two icons in the leftmost column. The first is the "Full edit" icon ( ). When you click it, you will see the hazard in a new browser window, and you can access all the editing capabilities of the Hazards module, including the sub-modules of that module (is your head spinning yet?). The second of the editing icons ( ) will open the "quick edit" form, which allows you to change the basic information about the hazard in the Hazards sub-module.

Reports Screen

Reports will be made available in multiple formats and layouts. The number of reports that anyone might want to see is enormous. We continue to develop more example reports, just to illustrate the possibilities. We welcome your feedback and requests.

Reports are of two primary types: "List" reports and "Record" reports.

List reports in the Hazard Reporting module will provide lists of hazards entered into the Hazard Reporting module. List reports can be accessed from the Reports tab on the List screen.

Record reports will provide details about a single hazard reported and/or blank forms that can be used for manual data collection purposes. Record reports can be accessed from the Reports tab on the View screen. Let's take a look at one.

If you click on the View tab, you will be taken to the View screen where you will see the Reports tab at the right. Clicking on the Reports tab will take you to the Reports screen where you should see a list of links to existing reports. Click on the "Hazard Report" link and see what you get (it will depend on which record you're viewing). If you don't see reports you would like to see, feel free to send us an email or enter a bug/feature request.

Notification List Screen

Many modules in Active Agenda contain information that you might need to share with others. The Notification List screen is where you can define a list of notification recipients. To see the Notification List screen of the Hazard Reporting module, go back to the List screen and then find the Notification List tab. You can add new recipients and edit existing ones in the same way you add and edit data within sub-folders (see Sub-Folder Edit Screens)

Support Features

Active Agenda provides several ways to get help if you get stuck. Help is provided for fields, screens, the technology, and the domain of risk management itself.

Support Documentation

 Support documentation is available by clicking on the "Documentation" icon of each module. This will open a new window containing guidance about how to implement Active Agenda from a domain perspective. Users can modify the documentation, and link directly to the support documentation page on the Internet. The support documentation is maintained as a collaborative document that can be modified by anyone in the Active Agenda project community.

Forums

 The Active Agenda project uses discussion forums to bring the community together. The forums can be a great source of help. To access the forums, you simply need to click on the "Forums" icon on the top frame of the application. Module specific forums can be accessed by clicking on the "Forums" icon located on top of the screen tabs in every module.

Glossary

The Glossary module allows you to look up words that you may not be familiar with. You can modify the Glossary to help share organization specific nomenclature and improve specific understanding. The Glossary can be accessed by clicking on the "Glossary" icon located on the top frame of the application.

Phrases

Every field of Active Agenda has a phrase associated with it. If you ever want to know what a field is for, you can "mouse-over" the field and receive help in the form of a bubble-phrase. Bubble phrases are used to explain the purpose for fields and icons throughout Active Agenda. If you don't know what it is - mouse over and wait for the bubble.

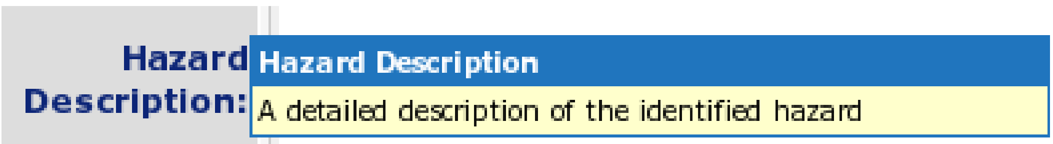


Figure 11: Bubble-over help phrase

Quick Guide

The Quick Guide is designed to provide enough help to get a user started with site navigation. You're reading it now. This guide is accessed through the "Quick Guide" icon on the top frame of the application. Each Quick Guide section is associated with its respective screen so the guide will open to the most pertinent level of help possible. If you think we should have included something else in the guide, please let us know by sending us an email using the "Email Us" icon on the top frame of the application.

Email Us

If you are frustrated and want to send us an email, you can do this by clicking on the "Email Us" icon on the top frame of the application. We promise to reply to you very quickly. Please let us know how you would like to be contacted (e.g. by email or phone).

Bug Reporting and Feature Requests

Users can submit bug reports and feature requests directly to the project tracking system. Bug reports and feature requests are entered by clicking on the "Bug" icon located above the screen tabs of every module. If you're not sure whether to report the bug or request because you're not comfortable with the tracking system, just send us an email using the "Email Us" icon on the top frame of the application.

More about features

Dashboard Screen

Now that you are more familiar with moving around in Active Agenda, let's return to the Dashboard screen for a minute. We'd like to explain its features a little more fully:

Your Actions

The "Your Actions" tab contains your unresolved actions from throughout Active Agenda, and displays them for quick and easy access. After opening the tab, you can modify an action by clicking on the small icon in the row of the action you want to edit. Clicking on this icon allows a user to edit an action's contents. Completed actions will disappear from the dashboard automatically but can always be viewed from within the Actions module.

Your New Accountabilities

The "Your New Accountabilities" tab contains accountabilities the user has been assigned since the user last logged in. Accountabilities are different from actions because they reflect ongoing accountabilities for issues that continue well beyond the completion of a single task (e.g. Your Actions). The accountabilities window on the dashboard simply displays recently assigned accountabilities by type, and is provided for information purposes only.

Your Shortcuts

Active Agenda is a highly complex database. Adding shortcuts from modules you often work with, or records you are currently managing, can save you a lot of time and prevent you from having to navigate there using the navigation menu. The "Your Shortcuts" tab lists all of the shortcuts you have placed on your Dashboard for your exclusive use.

Shortcuts can be added to your desktop by clicking on the "Add shortcut" link located at the bottom of the screen tabs within modules. Shortcuts can be removed by clicking on the "(remove)" link in the same location. Shortcuts can be opened in the same window or in a new window by clicking on the respective icons. You will notice that we have added a shortcut to a record of the Hazard Abatement module.

If you would like to see other features added to the Dashboard, please enter a feature request into our bug and feature request tracking system (see Bug Reporting and Feature Requests) or send us an email using the "Email Us" icon on the top frame of the application (See Email Us).

Guidance

Active Agenda allows internal or external subject matter experts to provide guidance on an issue-by-issue basis. If guidance is provided, a "Guidance" icon is displayed on the Module Tab at the top of the module screen and it looks like a navigational compass. Guidance is provided using the Guidance Module, which is found as a sub-folder in modules where the provision of guidance has been enabled.

Direction

Active Agenda allows organizations to associate very specific directions with every module. If direction has been provided, a "Direction" icon will be displayed on the Module Tab at the top of the module screen and it looks like a scroll. Direction is provided from the Modules Module, where administrators can assign location specific guidance to Active Agenda users on a location-by-location basis.

Resources

Active Agenda allows organizations to enter and track human resources and associate those resources with modules and organizations. If a human resource has been associated with a module and the organization "owning" the record, a "Resources" icon will appear on the Module Tab at the top of the module screen and it looks like little humans. Resources can be assigned from within the Resources Module.

File Requirements

Active Agenda allows organizations to assign file maintenance requirements and associate those requirements with modules and organizations. If a file maintenance requirement has been assigned to a module and the organization "owning" the record, a "File Requirements" icon will appear on the Module Tab at the top of the module screen and it looks like a little filing cabinet.

Frequently Asked Questions:

What is the difference between Closing a window and Reloading and Closing a window?

It' a browser thing. Closing a window without reloading will not reflect your changes when you return to the window below. This is particularly important when adding items to lists. If you add an item to a list and close the window used to add the item without reloading, the list will not reflect your latest addition/s. If you want the list to make your recent addition/s available, you must reload and close OR close and then reload. Huh?