

1. Login
  - a. To login to the application, if you have been given access, click the login button and use your rice NetID as you would with other rice applications.
  - b. You will then be redirected to the main page
2. Main Page
  - a. Navigation at the top
    - i. Partner, Project, and Student buttons will redirect you to the respective query page
    - ii. The “Logout” button will redirect you to the main page and log you out of the application
  - b. Data page
    - i. Click the “Upload Data!” page to be redirected to the Data page which is explained below
  - c. Training Manual
    - i. This will allow you to download the training manual for wherever you need to access it
  - d. Programs
    - i. On the left side of the page there is a list of all the Programs. Click on the buttons to view the profile for a Program.
3. Data
  - a. Entities
    - i. Partner
      1. These are partners for the Program at the CCL outside of rice
      2. Partners work with “Projects” which represent a interaction between any number of partners and students with a program
    - ii. Program
      1. Like ASB, UI, LRME these have a specific purpose and are what students and partners do at the CCL
    - iii. Project
      1. A Project represents an interaction with a Program. Something like an “ASB Trip” might not be considered a project, but is still used to represent that students went on a trip, with specific partners
    - iv. Student
      1. Student interact with specific projects, that are connected to partners and programs.
  - b. Uploading Data
    - i. For each sheet of data that is uploaded, there is a template under the place where the file would be uploaded
    - ii. To upload a file, click “Choose a file”, then choose a file from your local file system that matches the template with data filled in, then click “Submit”
    - iii. Steps

1. Usually you will be uploading an update in data to an existing Program, so first you would upload the “Projects” for that Program that were just run.
  2. Once the projects are added, upload your Participation data
    - a. There should be 2 sheets
      - i. The first represents the Students interaction with a project
      - ii. The second represent the partners interaction with a project
- iv. Feedback
1. When data is uploaded it will be check for a couple of things before confirming that the data was saved
    - a. If the site does not say the data was saved, meaning there are still errors on one or more sheets, then correct the errors and upload the file again
  2. What will be checked is a couple thing
    - a. there are no duplicated where they aren’t allow, e.g. duplicate project names.
    - b. That any entity referenced, for example a project, has already been created.
  3. Errors will display below where the data is uploaded
- v. If you have a lot of students or partners that have not been added to the database already, you can add them where it says “Optional” for each of partners and students.
1. There are templates for each that you should follow
  2. The student data sheet mostly follows the data from apply now with unimportant columns taken out
- c. Creating a single Partner, Program, Project or Student
- i. Each entity can be created by at least entering in a name that is unique(this is case-sensitive)
  - ii. Other information can be entered in in if it is needed as asked for
  - iii. Once entered in click submit, and if the entity was created it will tell you so, otherwise follow the feedback given
- iv. Special Cases
1. Student
    - a. Majors and Minors entered in should be comma-separated
4. Queries
- a. Each query pages, for Partners, Projects and Students have features to keep in mind
    - i. You should choose parameters from the dropdown to view a subset of the entities in the database
      1. By default all queries have a start and end year that makes sure that the entity has done a project with the CCL sometime in that period

2. Choosing other parameters, like semester, will make sure that the entity has done a project with the CCL between those years AND in that semester.
3. If multiple parameters are chosen in the same dropdown, for example choosing Fall and Spring semester, then the query will look for entities that did a project in either Fall OR Spring semester.
- ii. Click “View all Partners”(if you are on the Partner page) to view all the partner information available in the database. The same holds for students and projects.
- iii. Special cases
  1. For student queries, when option are chosen from the Programs dropdown acts differently
    - a. Within one group(like ASB Participant), if multiple options are chosen it will select for students where any of those options hold
    - b. If options from multiple groups are chosen(like ASB Participant and ASB Site Leader) the database will select student where the student has interacted with both of those programs in the manner specified.

## 5. Results Tables

- a. Each result table displays some or all of the properties about an entity
- b. Each column can have sort functionality toggled by clicking on the column name at the top.
  - i. The sort can be toggled to ascending, descending, or none at all
- c. At the top of each table there is a box where you can enter text
  - i. When text is entered it will filter the original table results to only display values where the text entered is present
- d. At the bottom of each table there is a paging functionality
  - i. You can increase the number of records per page to be 50 or 100, but the default on load will always be 20
  - ii. You can go back and forth between pages with the arrows
- e. Each row will have a “View Profile” button that will allow you to view the profile of the entity in that row
  - i. The profile will contain information detailed below.

## 6. Profiles

- a. Each profile displays a couple of things
  - i. Properties
    1. These can be an address for a Partner or Student, or a semester for a project
  - ii. Updating properties
    1. Once values have been entered into the inputs for each field that wants to be updated, click the “Update” button at the bottom

2. If there are no errors, which would display right below the profile, then the fields will be updated
    3. Any fields updated in the profile will update on the table on close of the profile
  - iii. Each entity will have other information that is displayed concerning it
    1. For example student profiles will have the different projects they applied or participated in
  - iv. Notes
    1. Each profile has the ability to create notes
    2. Notes have a content, author and time they were created
    3. Anyone can view the notes you create on a profile
  - v. Closing a dialog profile
    1. For each dialog there is a "Close" button at the top
- b. Program
  - i. FAQ's
    1. FAQ's are summary statistics on each Program's profile
    2. These can be expanded in the future based off of what information is deemed useful
    3. These are generated once a day, so check back the next day after data is uploaded
      - a. Note: this window could be made sooner if needed
- c. Student
  - i. Updating the interest in a CCL Certificate, or whether someone wants to pursue a CCL Certificate should be one of 2 values, "true" or "false". Otherwise the website will give you a gentle reminder