GCADC Client Tracker User Manual

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Introduction

Overview of GCADC (Greater Charlottesville Area Development Corporation): "Our mission is to reduce unemployment, underemployment and eliminate poverty by creating and identifying jobs within reach of those being left behind in our economy, and positioning them to secure and excel in those jobs. Our approach is to amplify the effects of the region's extensive support services and economic power by deploying existing social networks to connect those resources more directly to the families struggling in our community."

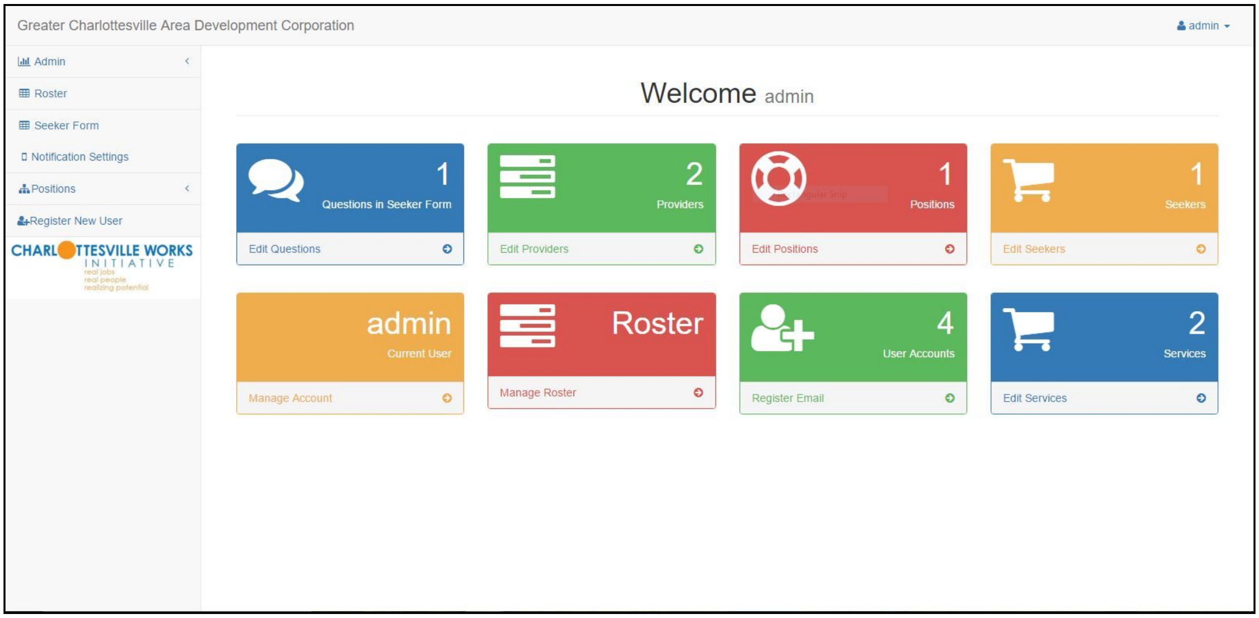
System Overview

This system is a client tracker application for the Greater Charlottesville Area Development Corporation (GCADC) - the main purpose is to allow multiple nonprofits to coordinate assistance to individuals who are working on obtaining employment. There are four types of users in the system - providers, peer, staff and administrators, all of which are detailed below.

Components

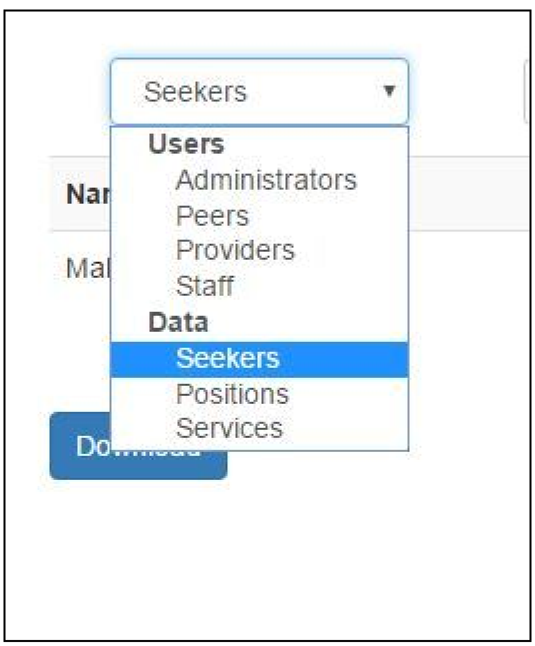
Admin Menu

The admin menu is the first screen that administrators are presented with after login. The menu displays a number of “Quick Start” options - these should be self-explanatory. Each of these options can also be accessed from the sidebar, but these are meant to be an easier way to access the most common actions.



Roster

The roster allows the user to access most of the main operations in the application. Here, users can create, add, update, and delete all entities in the system. On the left hand side of the screen, users are presented with a dropdown to select the entity they want to interact with. The roster is divided into two groups, Users and Data, which are described in detail below.



Selecting an option from this dropdown menu will take the user to a table that displays all objects of that type, with the ability to add a new item, as well as view, edit, and delete current items. Below is a description of the view associated with each object.

USERS

Administrators, Staff and Peers

As stated earlier, the system has 4 primary users: Admins, Staff, Peers, and Providers (the later which will be discussed in more depth below). The first 3 users mentioned act similarly to each other, except have varying degrees of system authorization based on their user type. The admin, being the superuser, has access to all the functionality that system offers and has the ability to add/delete/modify all the users/data stored in the system. Staff and Peer users have limited access to the system, and restricted to the features of the Roster Tool and Seeker Form.

Supported Operations: Varies

Providers

A Provider represents a user (or more specifically an organization), willing to offer a service to the various Seekers in the system. Providers can only be added, modified, or deleted by admin users. A provider can be directly added using Add Provider in the sidebar menu <u>OR</u> added, edited, or deleted using the Roster tool.

Supported Operations: Add, View, Edit, Delete

DATA

Seekers

A Seeker represents an individual seeking assistance/employment and is to be added by a Peer user. The Peer (or Admin) creates the Seeker and as a result the individual represented by the Seeker never directly accesses their profile or any of the other system features. The Seekers can be directly added using the Seeker Form shortcut in the sidebar, <u>OR</u> added, edited, or deleted using the Roster tool.

Supported Operations: Add, View, Edit, Delete

Position status of a Seeker is display in the Provider Field for a given Seeker.
Red Dot: Service has been closed.
Yellow Dot: Seeker is looking for Providers.

Green Dot: Service is in progress of being Provided

Name	Position	Providers
Malcolm Brogdon	Software developer	provider 4
Anthony Gill	Software developer	provider 4
London Perrantes	Software developer	None

Positions

A Position represents a job/opportunity opening, and is to be added by a Admin or Staff user. The Positions can be directly added/closed using the Positions dropdown in the sidebar menu OR added, edited, or deleted using the Roster tool.

Supported Operations: Add, View, Edit, Delete

Adding Position Attributes:

An admin user has the ability to add additional attributes to Positions in the system. For more details regarding this operation, please refer to Page 9, *Adding Global Position Attributes*.

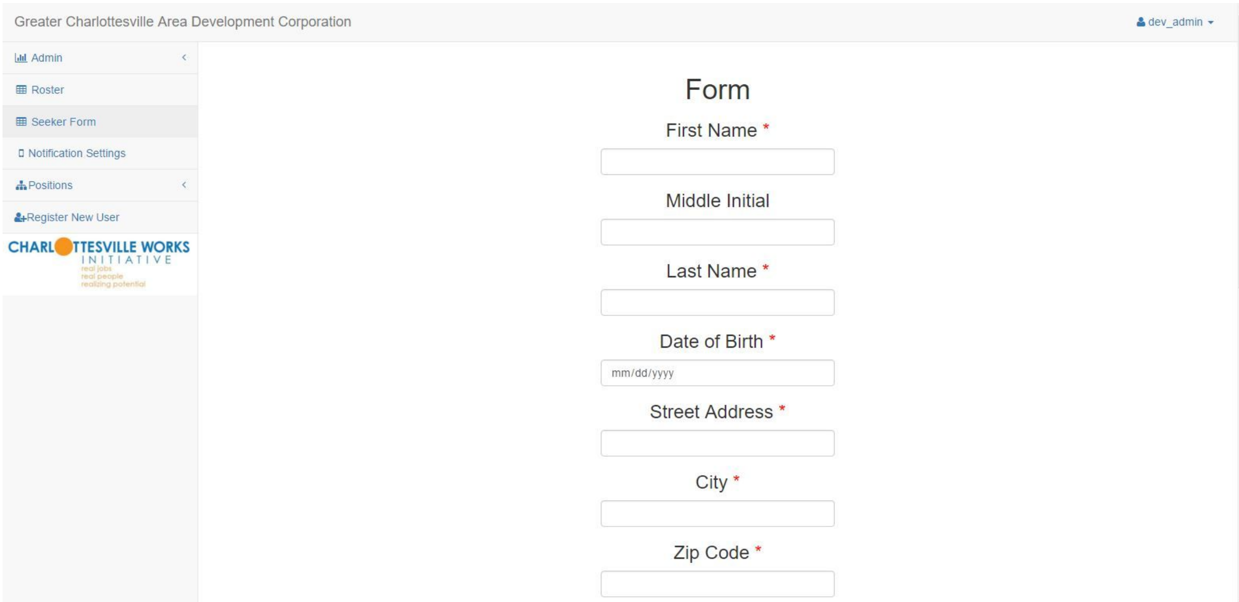
Services

A Service represents a general type of assistance (ranging from Transportation to Housing) that can be offered by any given Provider. Services can only be added, modified, and deleted by Admin users, but can be modified by Staff users as well. A service can be directly added using Add Service in the sidebar menu OR added, edited, or deleted using the Roster tool.

Supported Operations: Add, Edit, Delete

Seeker Form

The seeker form is filled out by the peer as the job seeker is interviewed. The form contains general information such as the seeker's name, email, and date of birth, in addition to the services they need and the provider they will be assisted by. Administrators may add additional fields to the seeker form, detailed below (see Adding/Editing/Deleting Questions on the Seeker Form). There are three separate screens on the seeker form - the user can hit Next and Previous to advance and go back before submitting on the third screen.

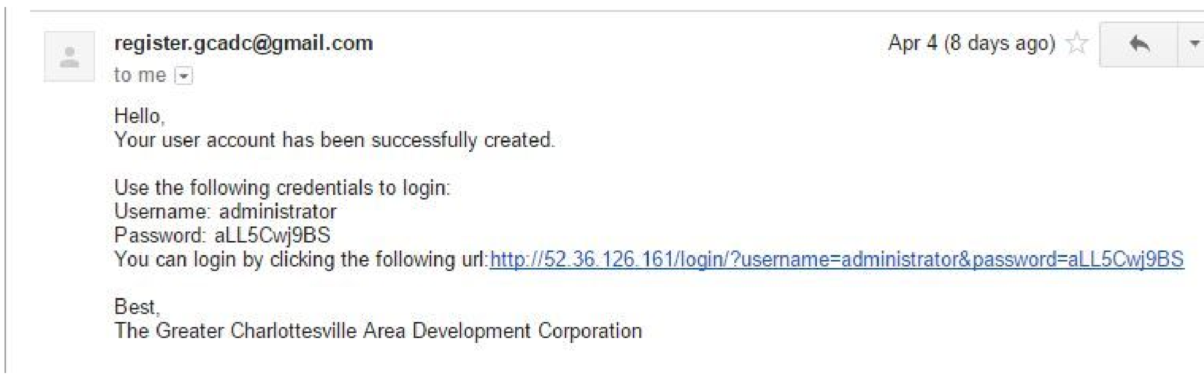


Certain fields are required, and the user may not advance to the next page until these are filled out. If left blank, they will light up to remind the user to fill them out before advancing.

Registering New Users

As outlined in the system requirements, users of the system cannot directly register for system access. Instead, users with Administrator access are allowed to access the “Register New User”

button in the sidebar. If the button above is not visible in your sidebar, contact a system administrator (or whoever created your account) and ensure that you are suppose to have administrator access. After clicking the link, the user is redirected to the Register Email page where they have the option to specify the new user's email address, intended username, and user type. After entering valid new user credentials, the system will deliver an email from **register.gcadc@gmail.com** containing login credentials, a temporary password, and a URL that will allow the user to both login to the system and immediately update their password.


register.gcadc@gmail.com
to me
Apr 4 (8 days ago)

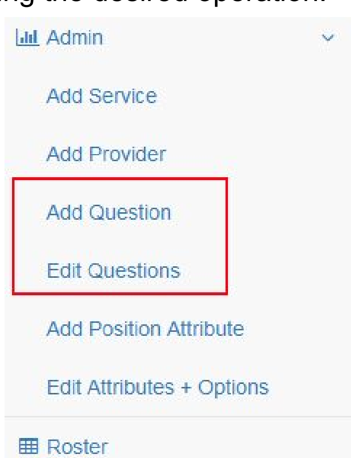
Hello,
Your user account has been successfully created.

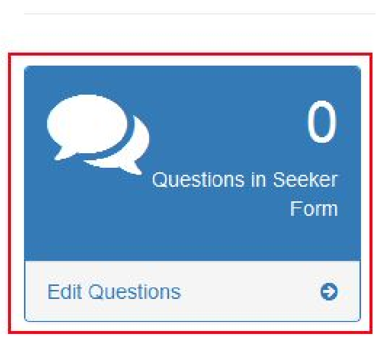
Use the following credentials to login:
Username: administrator
Password: aLL5Cwj9BS
You can login by clicking the following url:http://52.36.126.161/login/?username=administrator&password=aLL5Cwj9BS

Best,
The Greater Charlottesville Area Development Corporation

Adding/Editing/Deleting Questions on the Seeker Form

To add or modify questions to the Seeker Form, the user must have administrator access. To access these operations, the admin can either go directly from the Admin Menu page (by selecting the blue Edit Questions button) or by opening the Admin dropdown in the sidebar on the left and selecting the desired operation.





Add Questions:

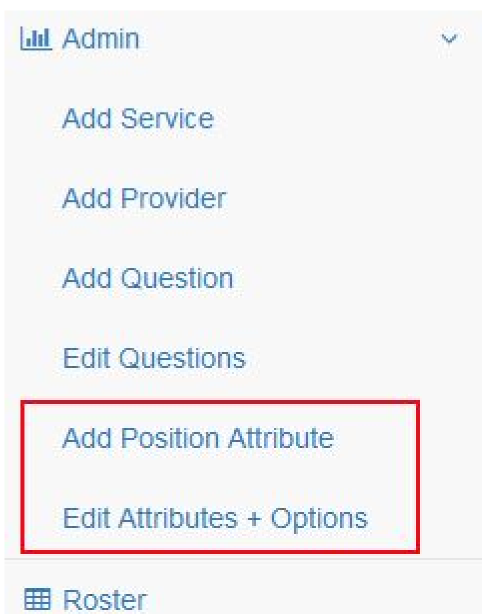
Once in the Add Question form, the user must select the question type and message and choose to make the question required in the seeker form or not. Once the question has successfully been added to the seeker form, the user is redirected to either the Admin Menu or prompted to add options for the respective question if necessary. Additional Options can be added at a later point using the Edit Questions function described below.

Edit/Delete Questions:

Once in the Edit/Delete Questions form, the user is presented with a list of all the questions currently in the system. From this point, the user can easily delete a question or edit its options (if the specific question allows for options - e.g. Multiple Choice Questions allow Options, but Date Field Questions do not) by clicking the *Delete* or *Edit Options* link for the appropriate question. Currently the system does not support the ability to edit a question's text or type, and therefore such a change requires the deletion of the original question and creation of a new one.

Adding Global Position Attributes

Admin users can add certain fields that must be filled out whenever a new position is created. The mechanism to do this is position attributes. These work similarly to adding questions to the seeker form. The operation can be accessed from the Admin dropdown in the sidebar, as shown below. Position Attributes hold similar types to Options for Questions, and are therefore created, modified, and deleted very similarly to Question Options.



Add Position Attributes:

Once in the Add Position Attribute form, the user must select the attribute type and text. Once the attribute has successfully been added to the Add Position form, the user is redirected to either the Admin Menu or prompted to add options for the new attribute if necessary. Additional options for the attribute can be added at a later point using the Edit Attributes + Options function described below.

Edit/Delete Position Attributes:

Once in the Edit/Delete Position Attributes form, the user is presented with a list of all the Position Attributes currently in the system. From this point, the user can easily delete an Attribute or edit its Response Options (if the specific Attribute allows for options - eg Multiple Choice Attributes allow Options, but Date Field Attributes do not) by clicking the *Delete* or *Edit Response Options* link for the appropriate Attributes.

Notification Settings

The system supports Text (via Google Voice) and Email notifications for new Positions. The feature is reserved for Peers. To access Notification Settings, the user can either select Notification Settings in the sidebar, or under the shortcut menu which is accessible by hitting the user icon/name at the upper right hand corner of the user interface.

Once in the Notification Settings form, the user can simply choose between Text, E-mail, Both, or No Notifications based on their selection, or lack-thereof.

Conclusion

This system was created in partnership with GCADC, Aaron Bloomfield, of the University of Virginia Computer Science Department, and the following students: Albert Borges, Tyler Crawford, Mamadou Diallo, Austin Farquhar, Evaristo Koyama, Scott Mallory, Zach Showalter, and Nathan Thillairajah. For additional questions, comments, or concerns regarding this system and accompanying user manual please contact Ridge Schuyler, ridge.schuyler@cvilleworks.org, 434-996-6780.