Holladay Pediatric Scheduler

User Manual

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User Guide

Introduction

This User Guide will cover the steps to install and set up the program and database on a local machine, the credentials to log in, and all the features and functions of each page in the scheduler.

Installation and Using the Application

Installation Via Local Windows Machine

(This is a lengthy process with the potential to make setup errors)

My IDE Versions And Dependencies

IntelliJ IDEA 2021.1.3 (Community Edition)

Build #IC-211.7628.21, built on June 30, 2021.

Runtime version: 11.0.11+9-b1341.60 amd64

VM: OpenJDK 64-Bit Server VM by JetBrains s.r.o.

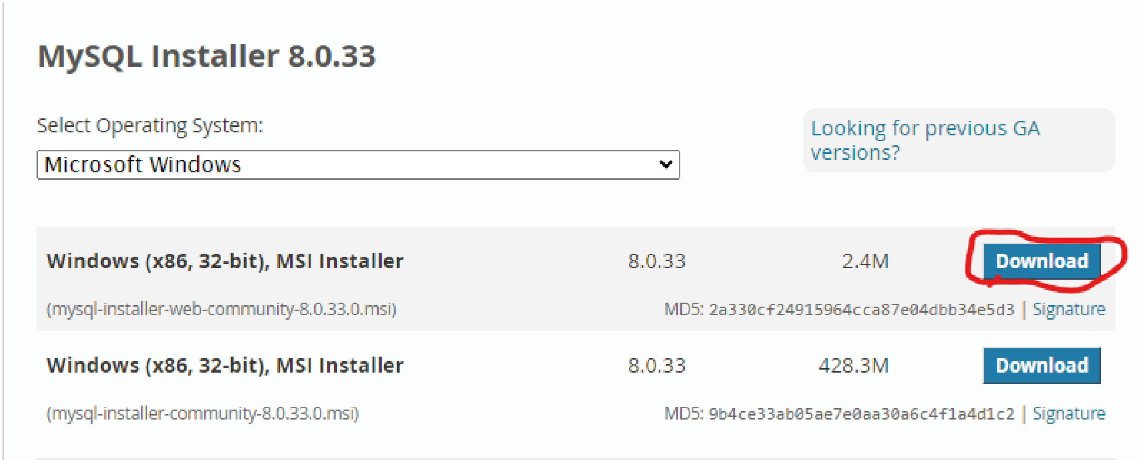
JDK Version: Java SE 17.0.6

JavaFX Version: JavaFX-SDK-17.0.6

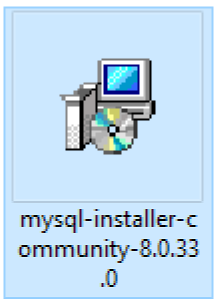
Local Client Installation Steps

1: Within this link, download the MySQL Server Installer for Windows (8.0.33).

https://dev.mysql.com/downloads/installer/



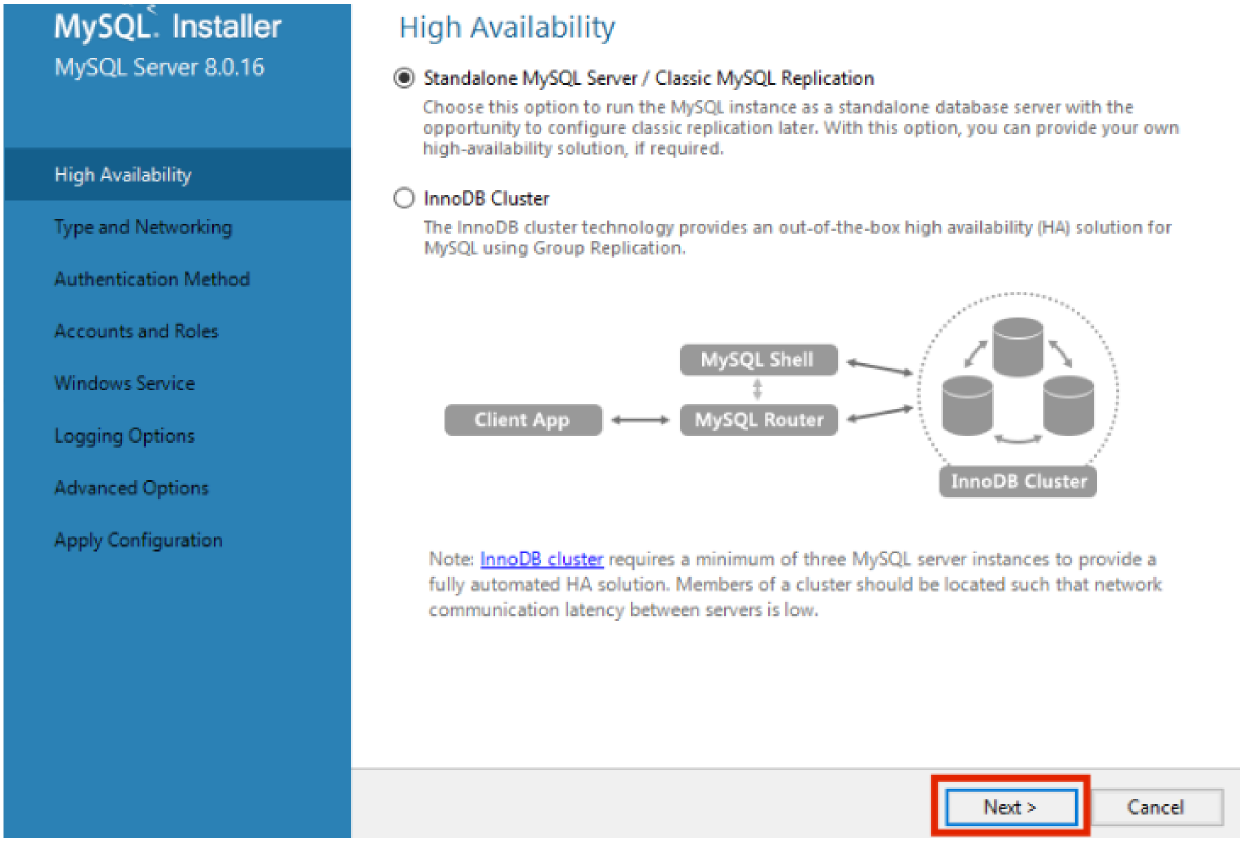
2: Open the downloaded file.



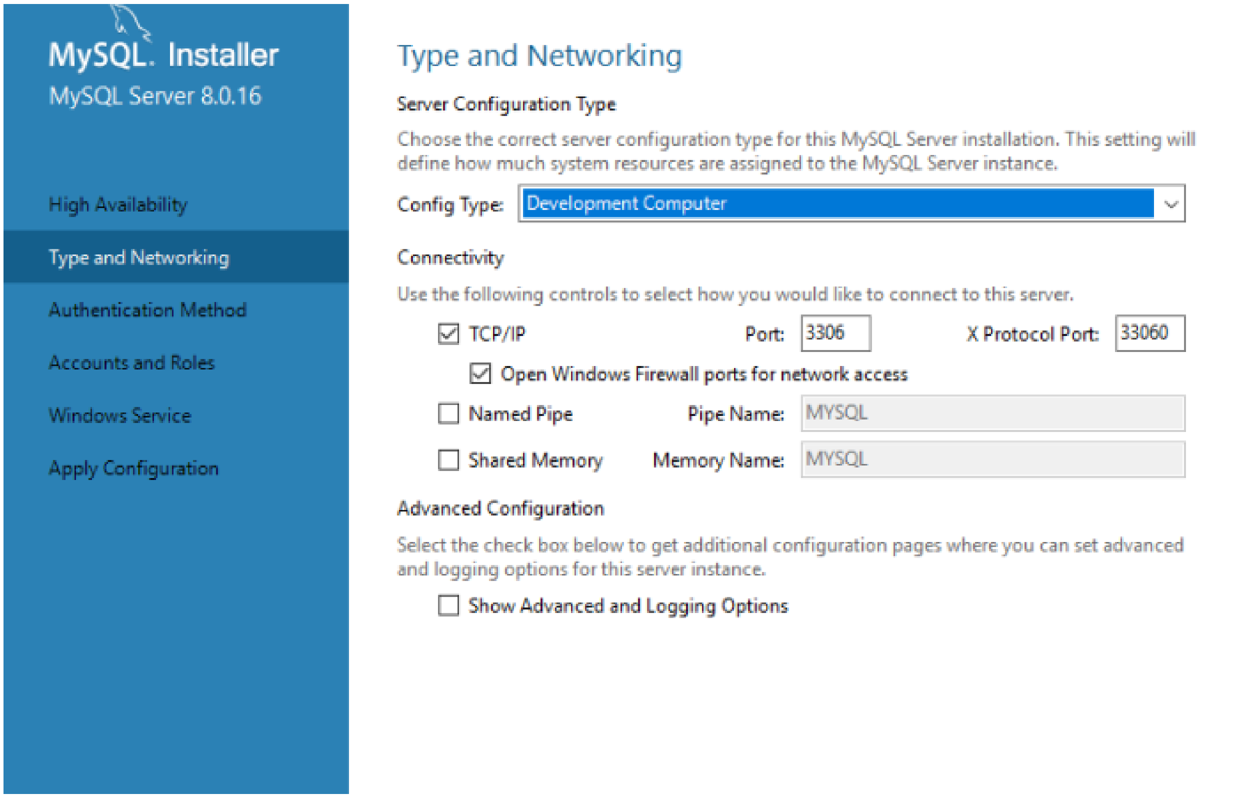
3: If the installer asks you about an upgrade, click yes. Leave most of the wizard options as default.

4: Click on MySQL Server and MySQL Workbench. Add them both. Then select and add Connector/OBDC x64 if it appears. Click next. Then click execute.

5: Within the MySQL Server installer, choose the default option and click next.



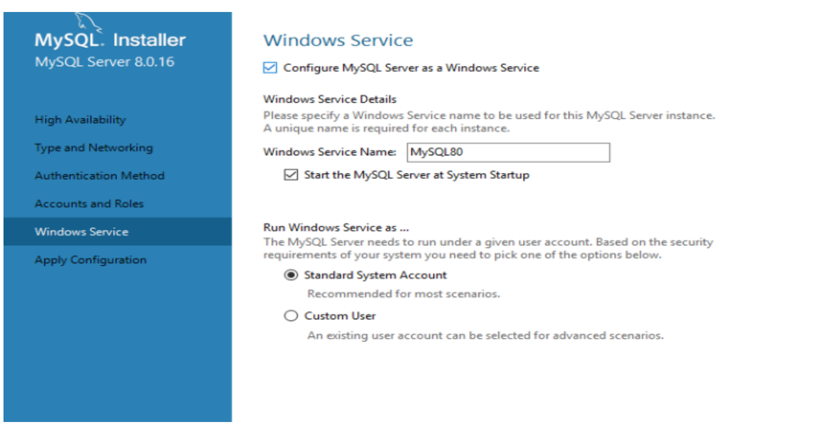
6: Leave most of the default settings selected and have the page match this image. Then click next.



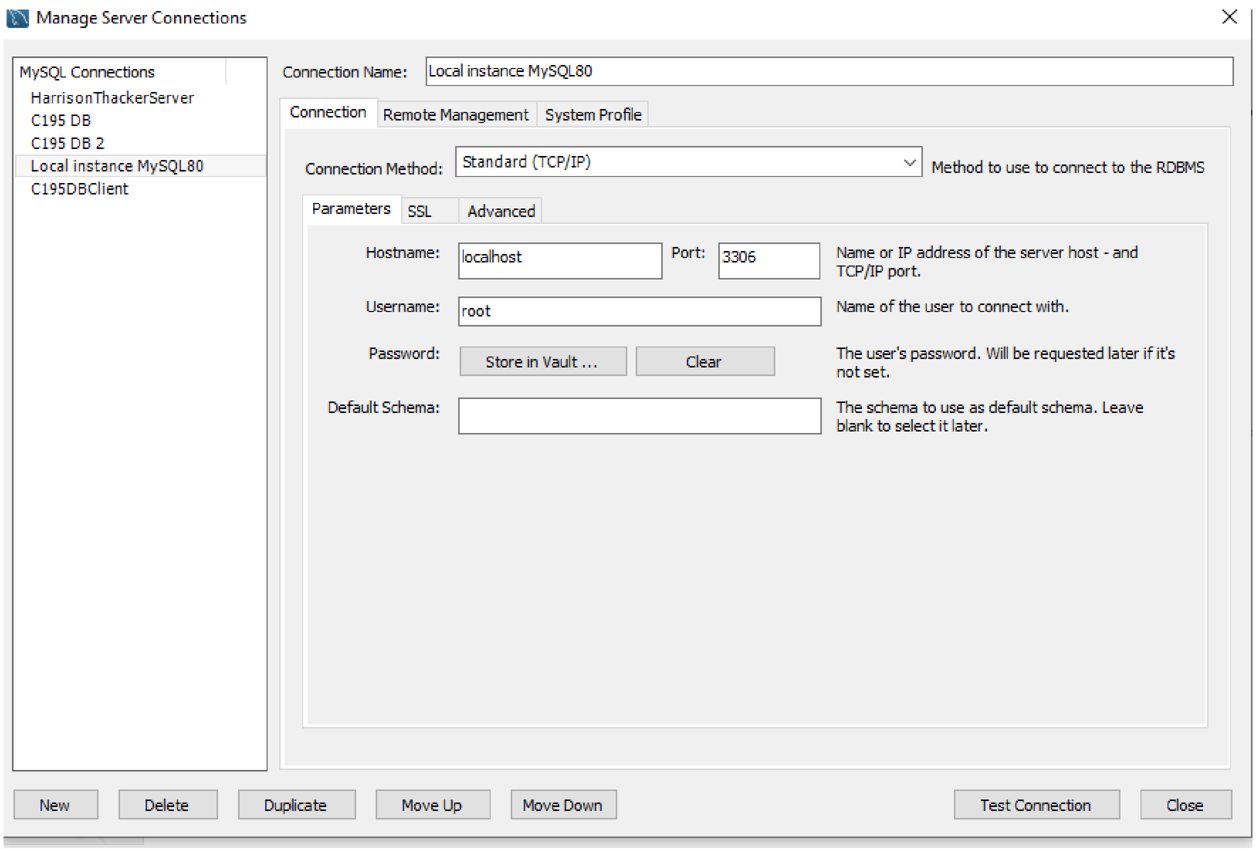
7: Choose the strong password encryption method for Authentication and then click next.

8: For the MySQL root password, use type in a password of your choice. Repeat it on the next field then click next.

9: Use these settings then click next. Then execute the installer.

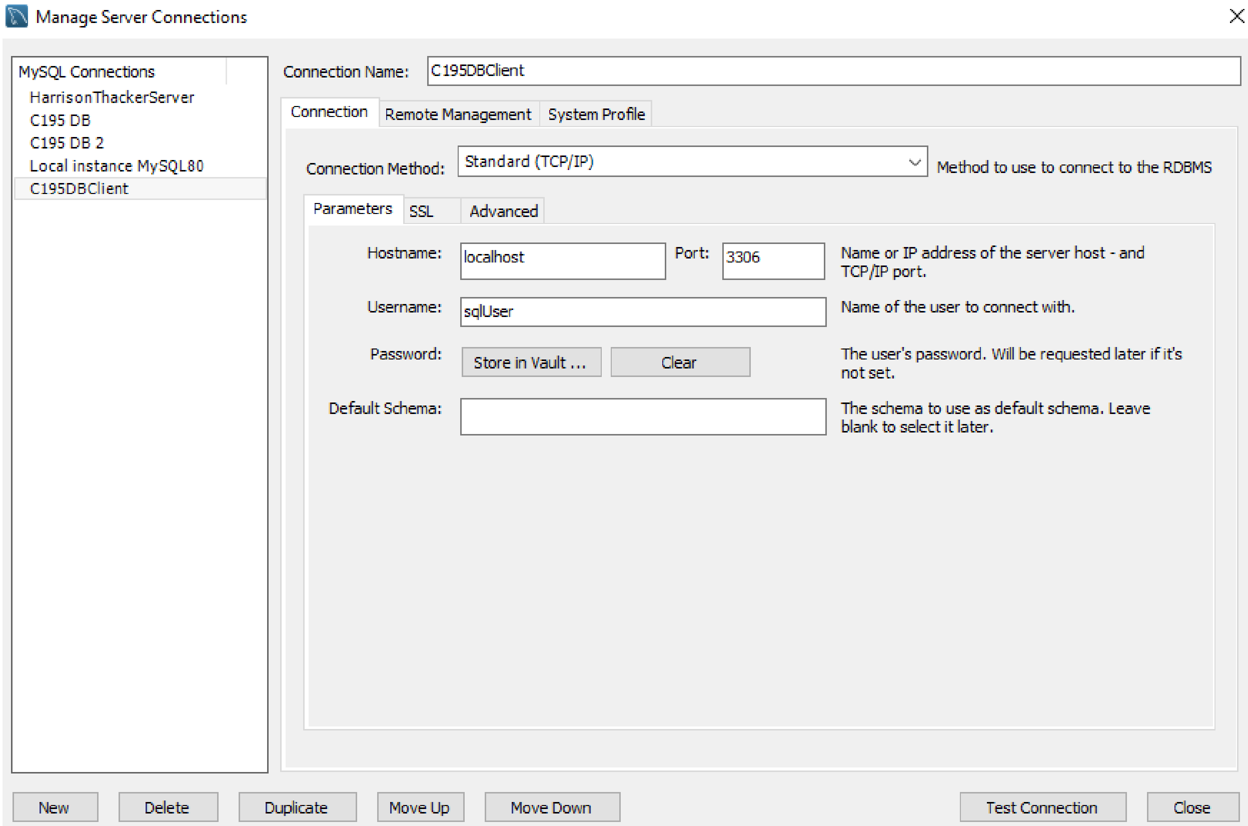


10: Open up MySQL Workbench. Click the plus icon to create a new connection. When creating, use these parameters. The password is the same as the root MySQL password that you chose.



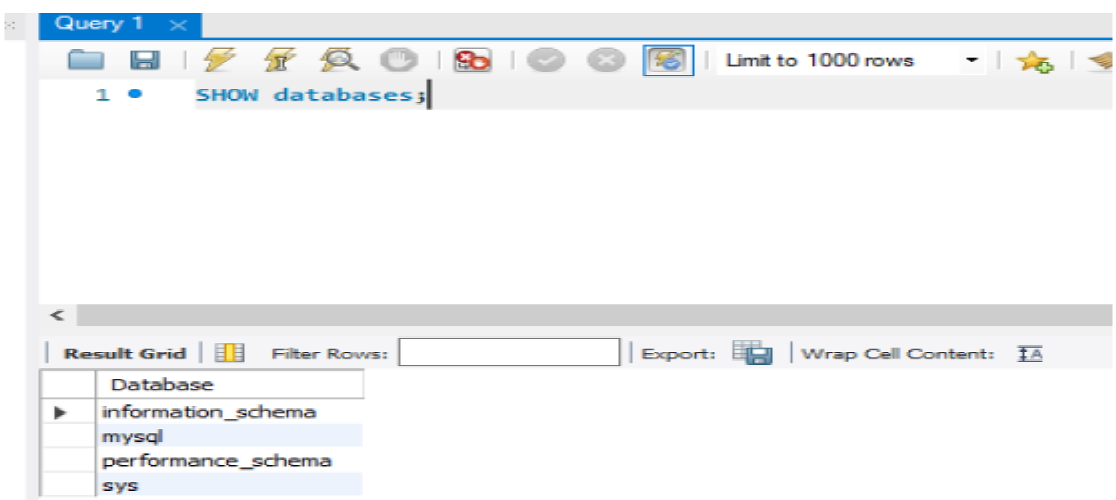
11: Click "Test Connection". If everything is correct, you'll be informed of the successful connection. Exit out of the window.

12: Create another new connection. Use the following parameters. The password for this connection is Passw0rd! which matches the SQL connection string. These parameters match the client_schedule database. Type in client_schedule as your database schema. Test your connection. If everything works, you'll be notified of the successful connection. Next, exit out of this window.

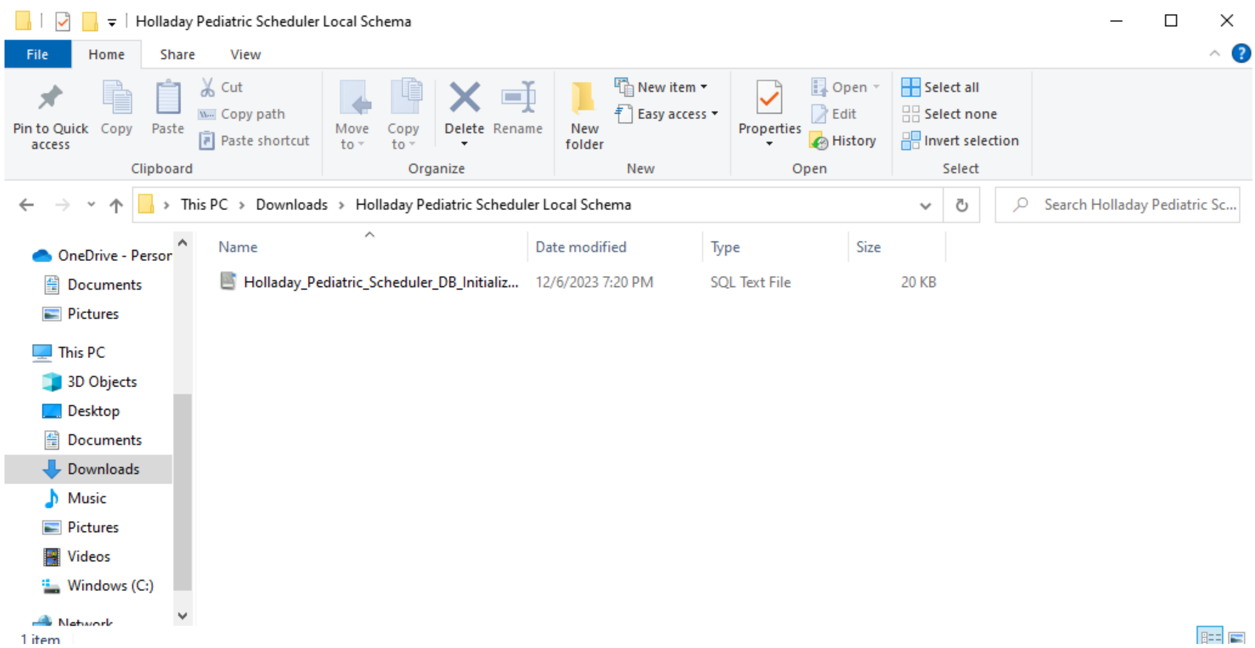


13: Open up the new DB Client Connection. Enter the particular password for this connection if you're asked for it.

14: Now enter the following in the query editor. You should get these results.

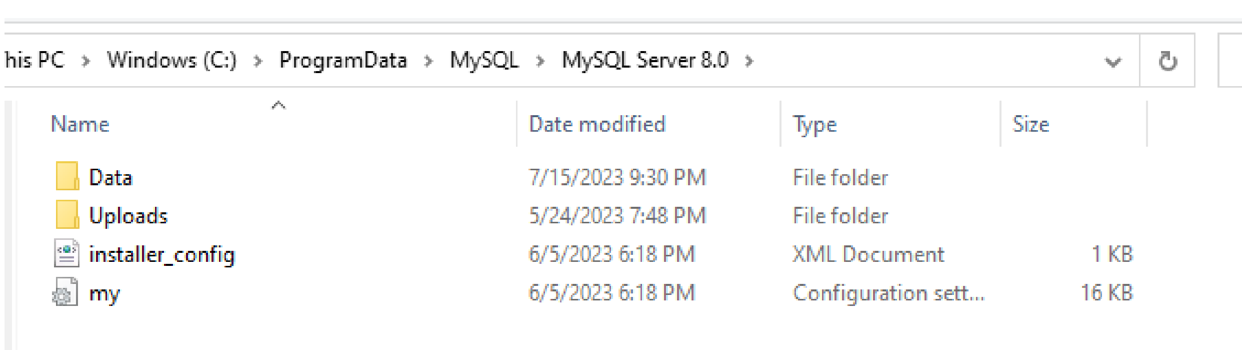


15: It's now time to create the database schema. Extract the Local Schema zip file found within the GitHub repository. Within the unzipped folder, open up the SQL file(Open with Notepad or something similar).



16: Scroll and select everything within the file, then copy it. Paste it all into the DB Client query editor. Scroll and select everything within the query editor, then click the lightning bolt icon to run everything. The client_schedule schema should be created, along with all the tables, and the sample data contained within them.

17: The local database needs to be running in UTC. Navigate to this directory on your machine:



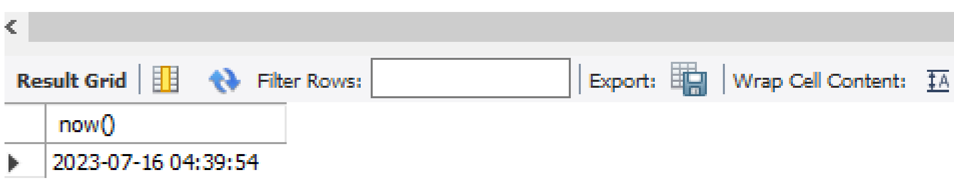
18: Click on the my.ini file(open in Notepad). Scroll down to the “mysqld” section. Insert the following text below. Then save the file and close it.

```
[mysqld]
default-time-zone="+00:00"
```

19: Either reset your machine or restart the MySQL80 Windows service for the database change to take effect.

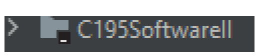
20: Open up MySQL Workbench, and click on your database client. Within the query editor, type: (SELECT Now() FROM dual);. Your output should show the time in UTC(several hours ahead of what your time may be).

```
12 •    SELECT now() FROM dual;
```



21: Open up Intellij IDEA on your local machine. Install it if you don’t already have it.

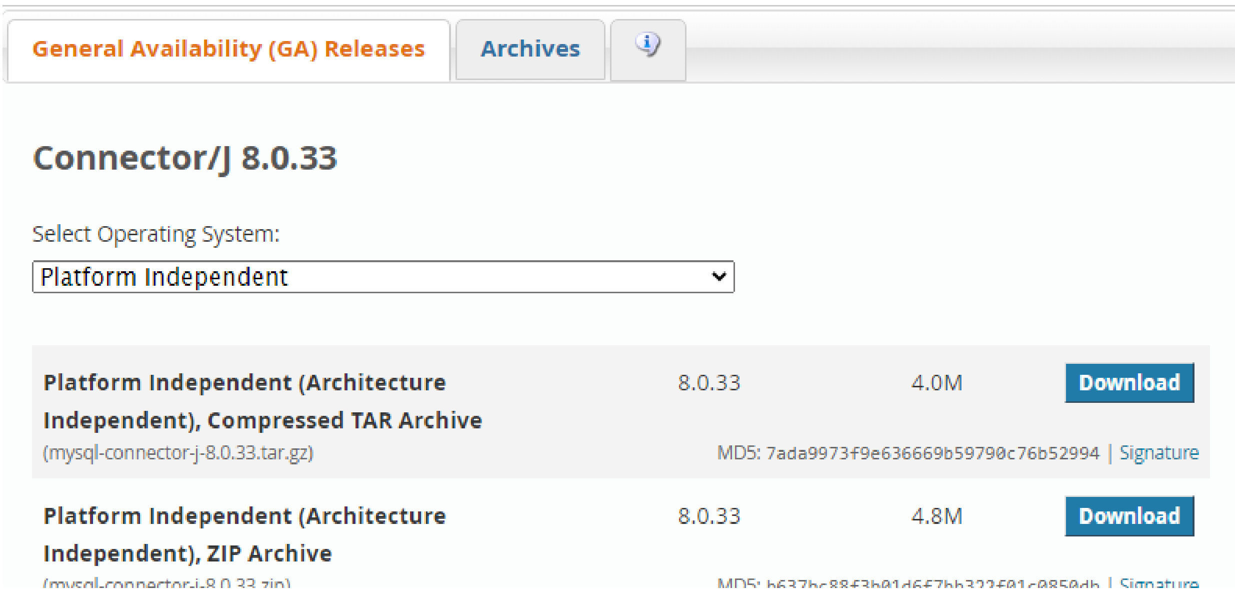
22: Click File, Open, then navigate to the directory where you unzipped Section B. Select the Software II folder within and click Ok.



23: Click File, Project Structure, Libraries. Delete the mysql-connector-java-8.0.25 with the squiggly lines.

24: Click the plus sign, select Java, then navigate to the directory where mysql-connector-java-8.0.25 (what I used) or a similar connector is installed. Select the jar file within that folder and click ok.

25: Click Ok on each window until the library is successfully added. Then hit apply and click ok to exit the Project Structure window. If you haven't installed the MySQL connector, download it from this link. You can choose your version from the archives section.



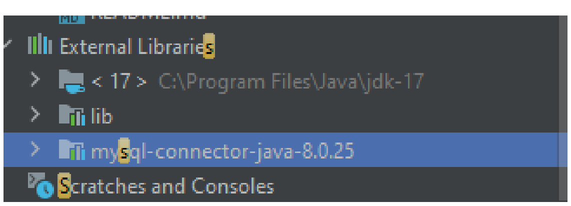
https://dev.mysql.com/downloads/connector/j/?os=26

If you don't already have JDK 17 and JavaFX 17 installed, here are the respective links:

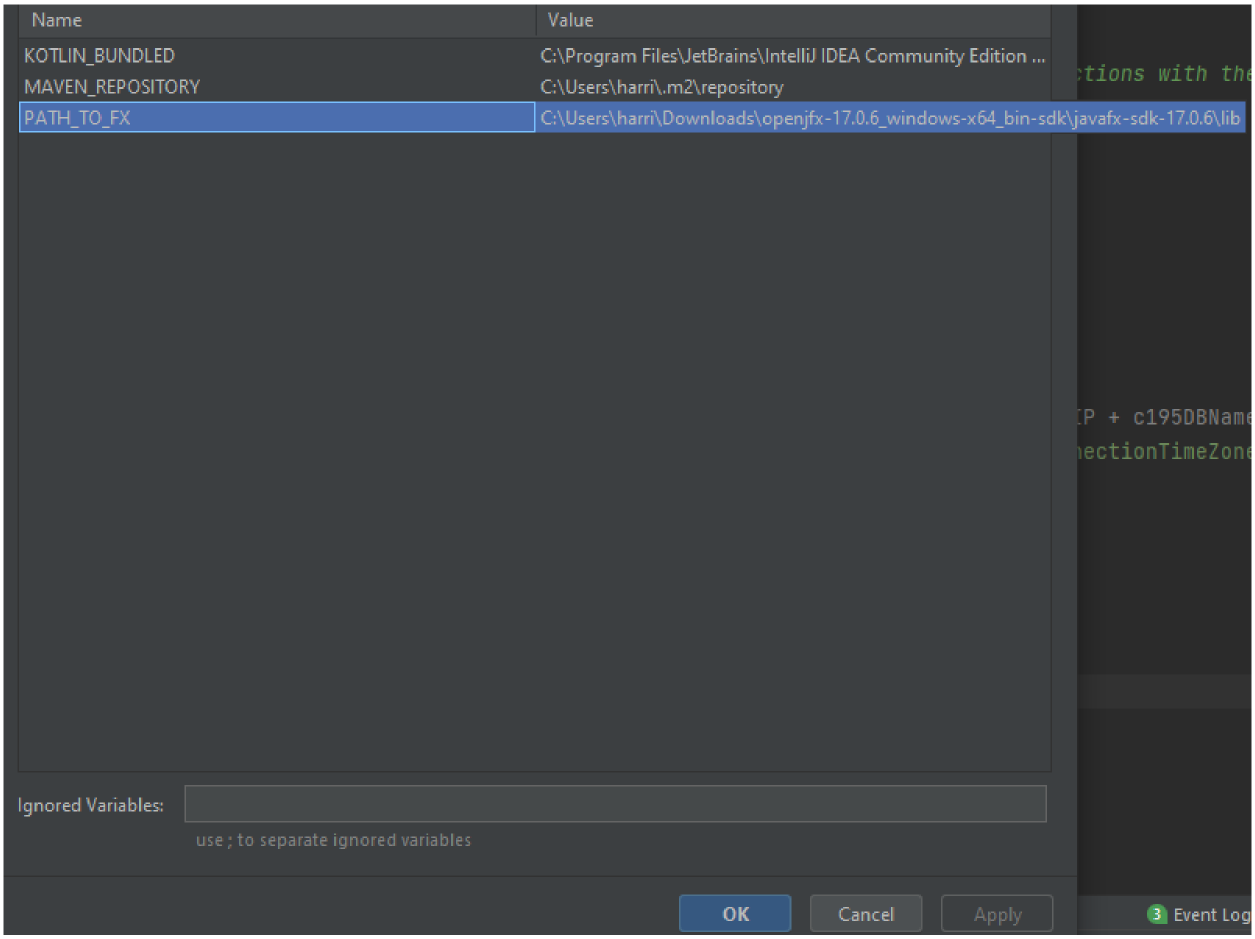
https://gluonhq.com/products/javafx/

https://www.oracle.com/java/technologies/javase/jdk17-archive-downloads.html

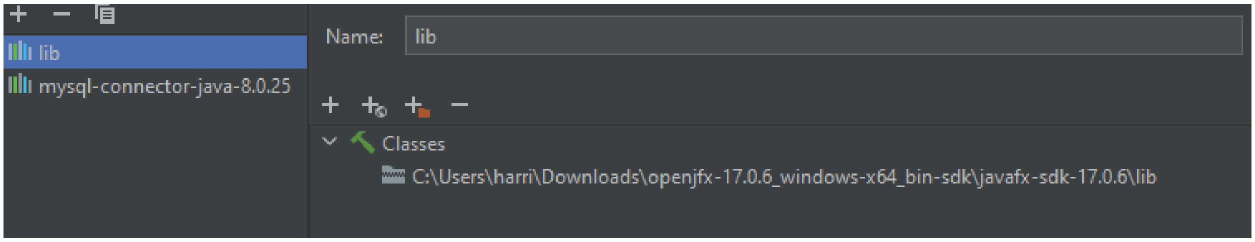
26: Navigate down the left-hand corner of the screen to the external libraries. You should see mysql-connector-java-8.0.25 or your chosen version as a new addition.



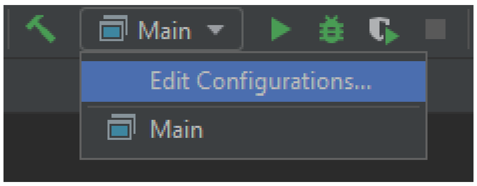
27: Navigate to File > Settings > Path Variables. Use the plus icon to create a new path called PATH_TO_FX. Navigate to the directory where you installed your JavaFX SDK. Select the lib folder within the SDK, and click ok. Click apply and then click Ok to exit the window.



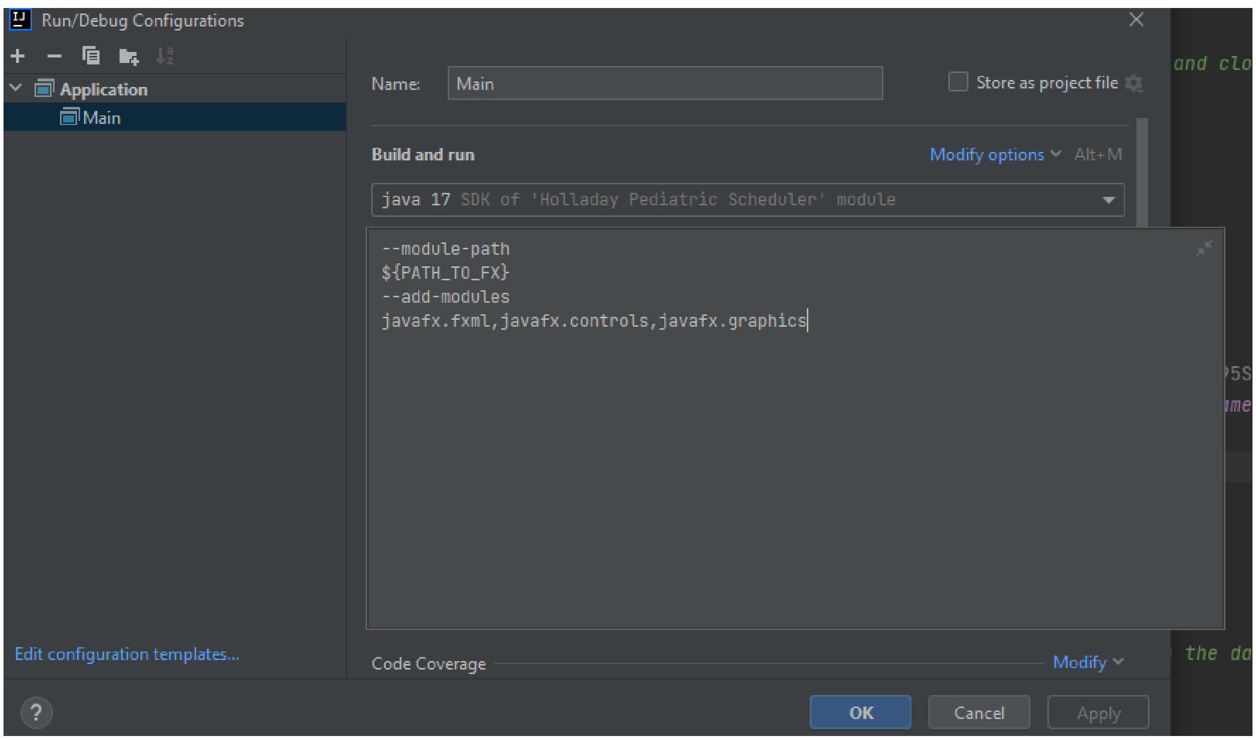
28: Navigate to File, Project Structure. Add a new Java library that is the lib directory for your JavaFX SDK. Select the lib folder and click ok. Add the library. Then click apply and exit the window.



29: Navigate to Main, Edit Configurations.

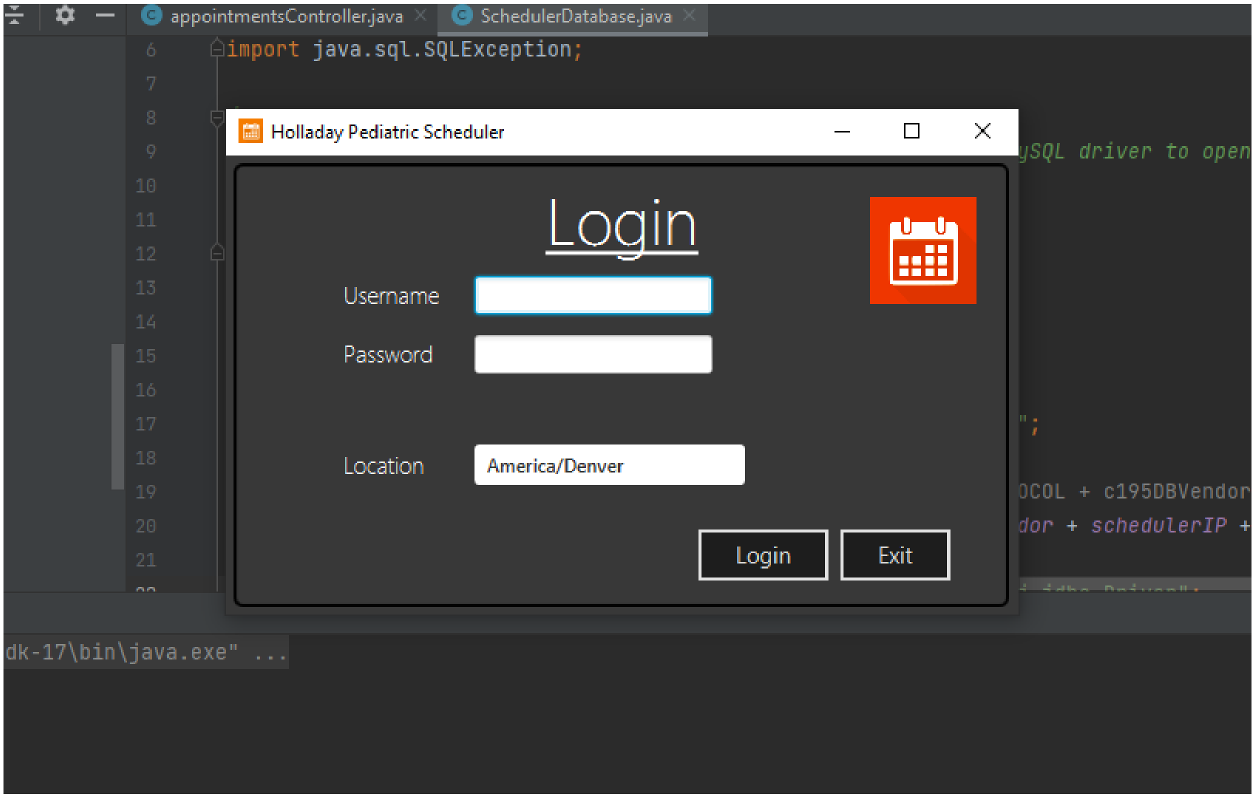


30: For the VM Options field, enter the following:



Then click Apply and Ok to exit out of the window.

31: Run the program. If all is successful, then you'll be greeted with the Login page.



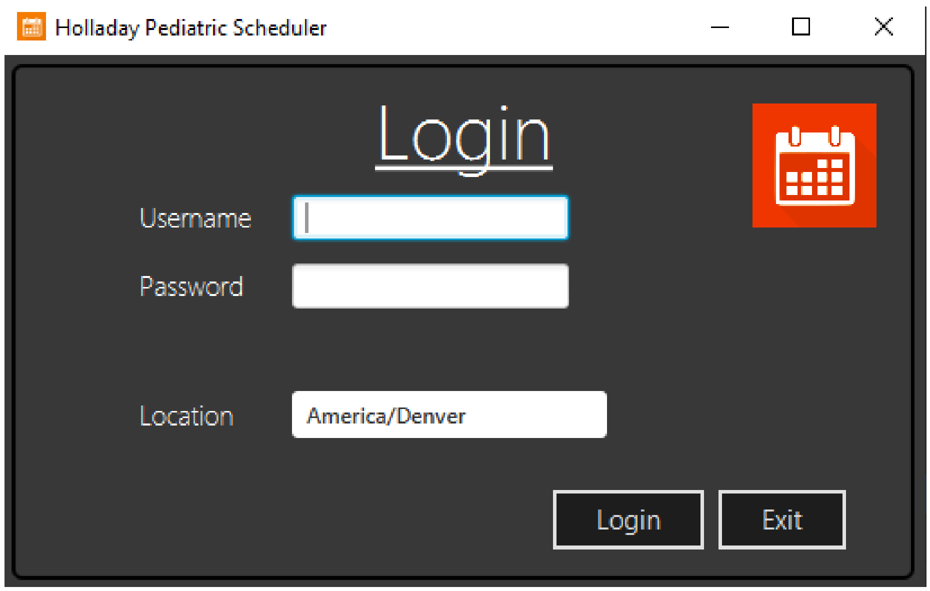
Guide To Operate Holladay Pediatric Scheduler

The remainder of this user guide will be spent detailing how to operate Holladay Pediatric Scheduler. Each functionality of the application's pages will be shown and demonstrated to the user.

Login and Signup

When the user starts the scheduler application, he or she will be greeted by the Login page. At the moment, there are only two login credentials in the database. The first is username: test, password: test. The second is username: admin, password: admin. The user must use the test credential for both username and password fields, or the admin credential for both fields. You will get an error notification if you type in a credential that isn't one of the current two. After both fields are filled, click the Login button to proceed. Upon logging in with one of the two credentials, the user will be successfully logged in and redirected to the navigator page. A log file of the login history is in **login_activity.txt**. It details the particular user, and whether the login at a particular time was successful or not.

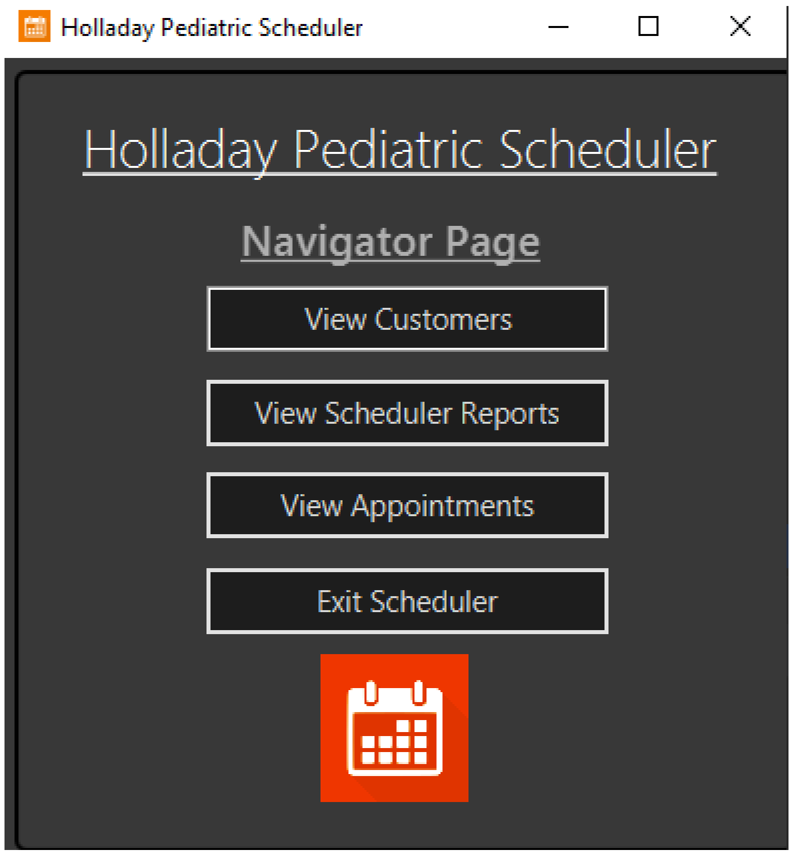
Login Page



Navigator Page

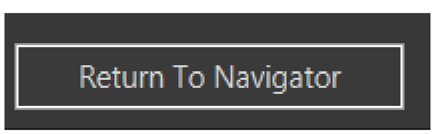
Here an employee or user can navigate through the scheduler application by clicking the particular page buttons. A user may also exit the scheduler if they so choose. The users can access the Customers page, Appointments page, and Scheduler Records page. This particular records page showcases details about the current customer data plus the schedule of a user's chosen appointment contact/pediatrician.

Navigator Page



Return To Navigator

At the top left corner of the customers, appointments, and reports screens is a button that closes out the currently open window, redirecting the user back to the navigation page. Select Yes on the confirmation dialog, and the page will be closed.



Viewing Reports For Holladay Pediatric Scheduler

In the scheduler reports page, there are three different pediatric scheduler reports available for a user to observe. They are as follows:

1: Two table views that show the totals for Customer appointments by month and appointments tallied by their respective types.

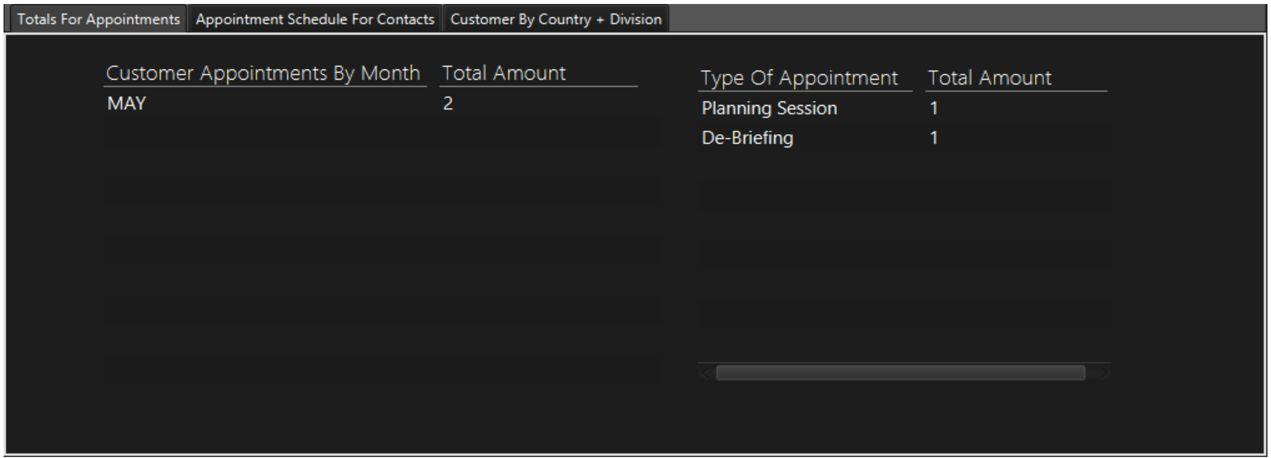
2: The current appointment schedule for a customer's chosen appointment contact(pediatrician/employee).

3: Table view that showcases the total count of customers by their own respective countries and first-level divisions.

Totals For Appointments

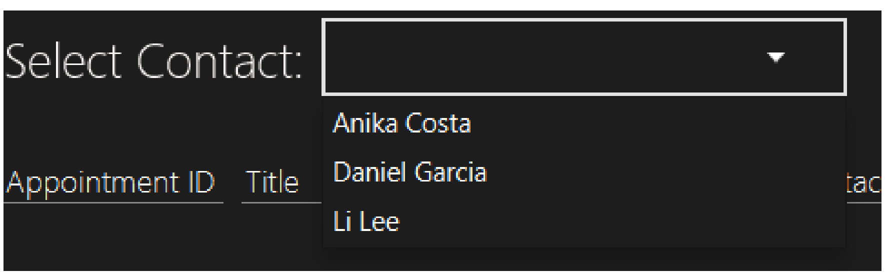
This is the first report the user sees when they launch the page. They can always navigate right back to it by clicking the "Totals For Appointments" tab above the Table view. These reports serve multiple purposes. Not only can the business owners gauge their performance by seeing the total number of customer appointments by month, but also they can tally the total amount of specific appointment types. This allows the company to determine which appointment types are more successful than others so they can focus on those more in the future.

Scheduler Records Page (Appointment Totals)

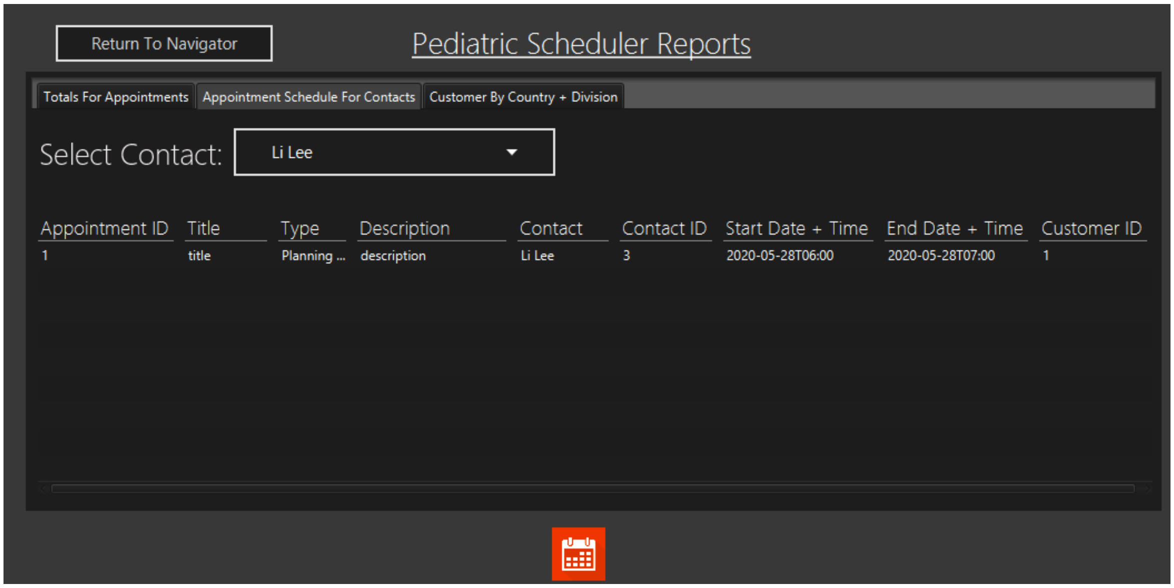


Appointment Schedule For Contacts

By selecting the "Appointment Schedule For Contacts" tab, the user can view the current appointment schedule of a given contact(pediatrician/employee). To view the schedule for a given contact, click on the drop-down combo box, and make a selection. The table view down below is populated with the schedule of the chosen contact. By cycling through this information, a user or customer can decide on which contact would fit their particular schedule the best.



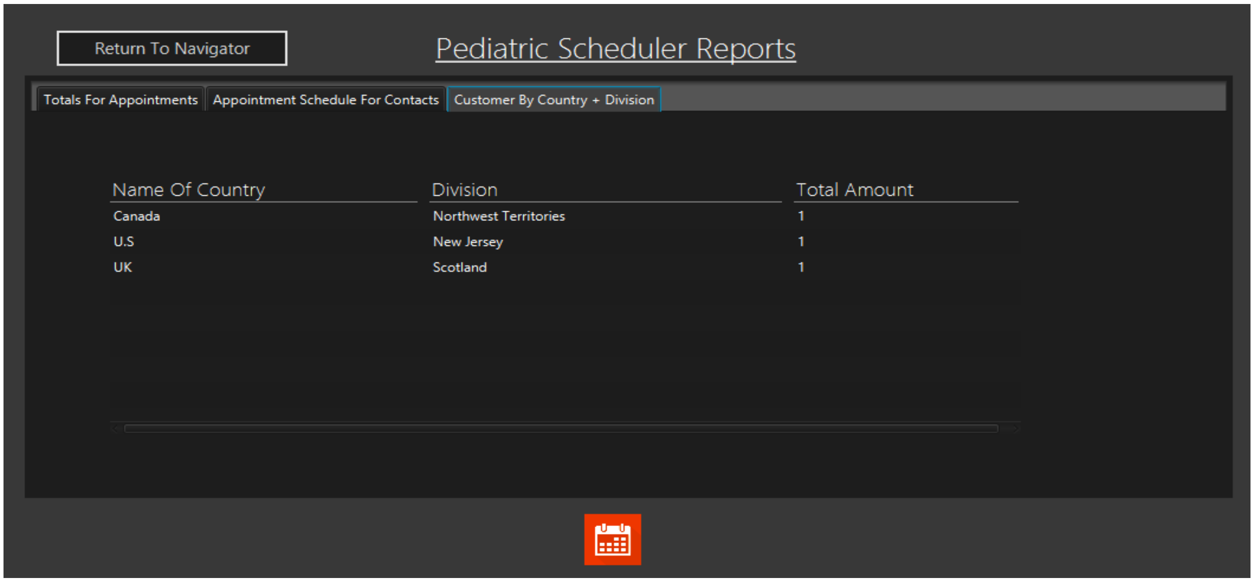
Appointment Schedule For Contacts



Customer By Country + Division

By clicking on the "Customer By Country + Division" tab, the user can view the total number of customers not only by their respective country but also the first-level division within said country. This report may be helpful when looking up customers in a given country, as well as the division. Depending on how many customers from a division and country visit Holladay Pediatric Scheduler, this may allow the business owners to gauge their most successful demographics and adjust their marketing and customer service styles accordingly.

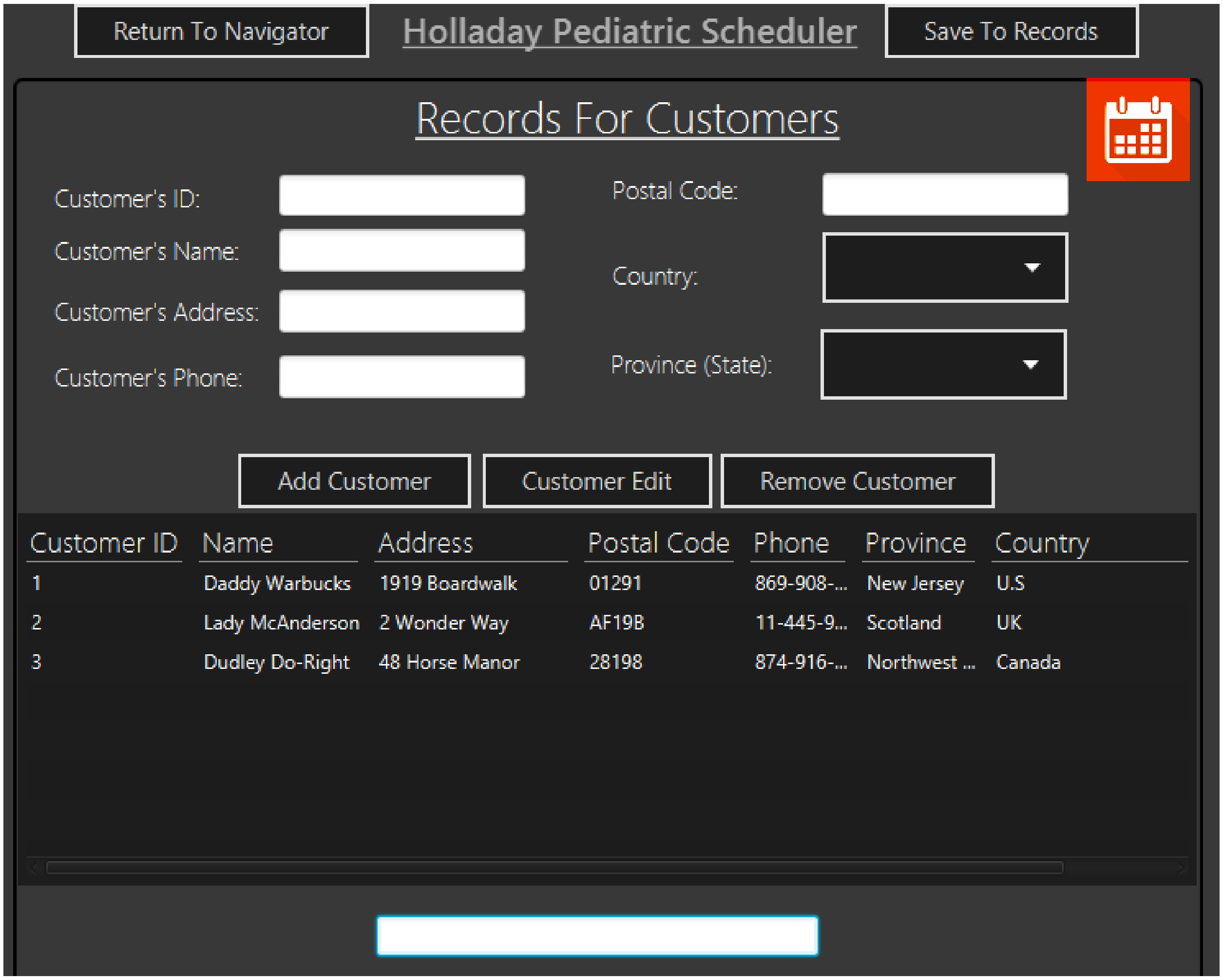
Customer By Country + Division



Managing And Viewing Of Scheduler Customers

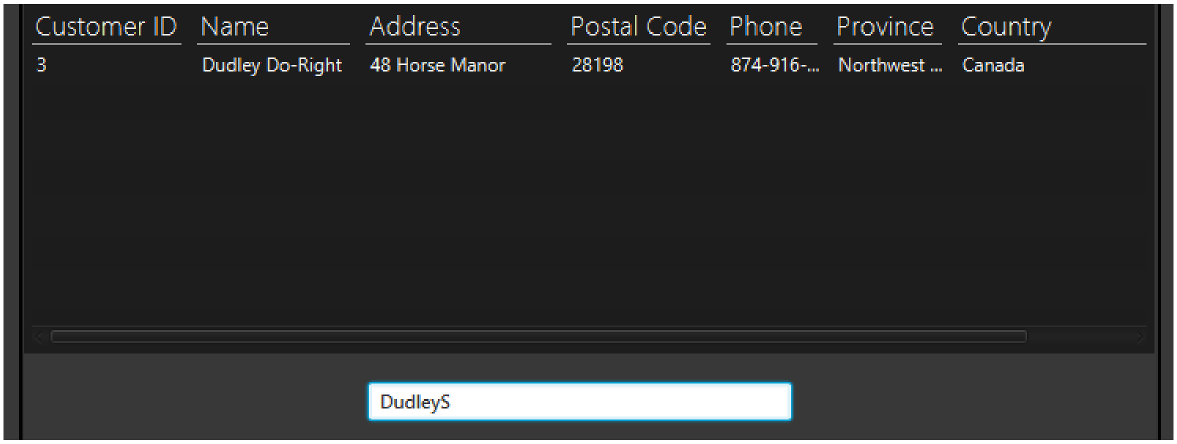
The Customers page is where employees and users can look up pedicure customers and display their information. New customers can be added to the records, or a pre-existing customer can be edited and updated with new information. When removing a customer from the scheduler records and database, any appointments associated with them will be deleted as well. The table view updates itself after an action is performed, which informs the user of changes made to the records.

Customers Page



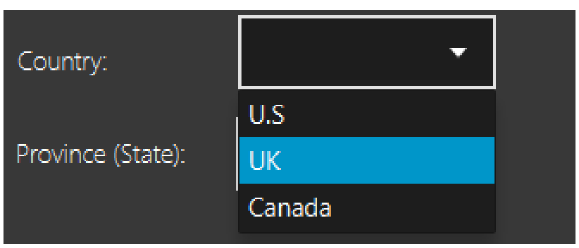
Searching For Customers

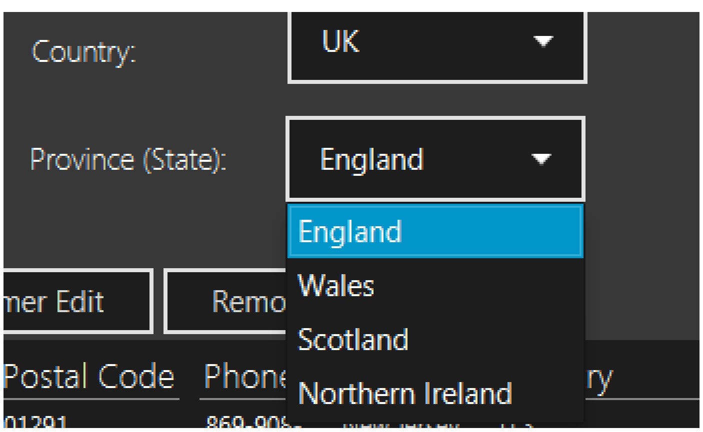
At the bottom of the Customers page is a search field that is used to look up specific customers by their name or respective ID. Partial fragments of a name will also be interpreted by the search function. Type in a customer name and the table view above will display a result that matches your search. If the search doesn't recognize the input values, an alert will notify the user of their search not returning any results.



Selecting Countries and Province (First-Level Divisions)

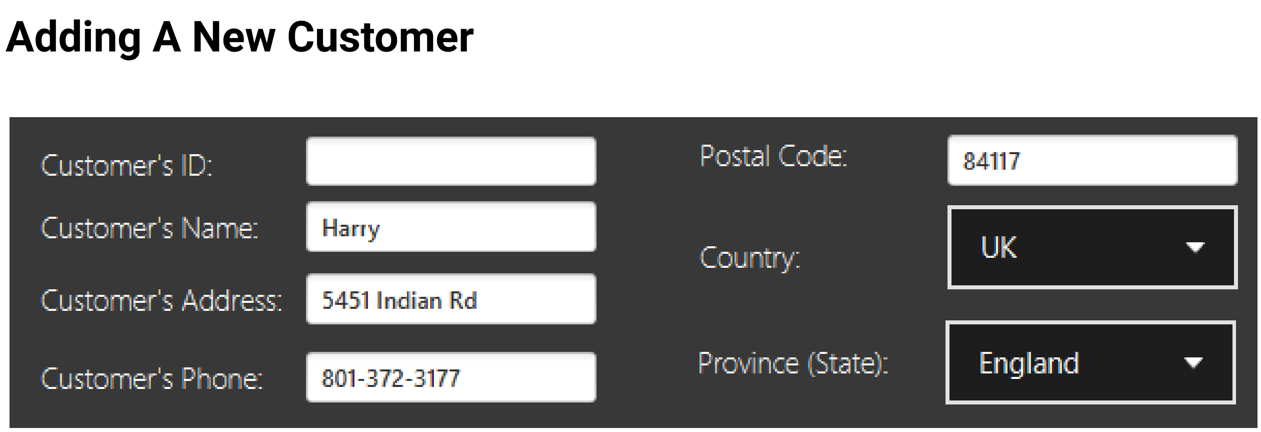
When adding or updating a customer, the user must select a country and province (first-level division). The country and province combo boxes filter available divisions depending on the country the user selects. This allows the user to only select the divisions that are part of a specific country. In the example shown below, the UK is selected for the country, and the available provinces are only the ones that are part of the UK.





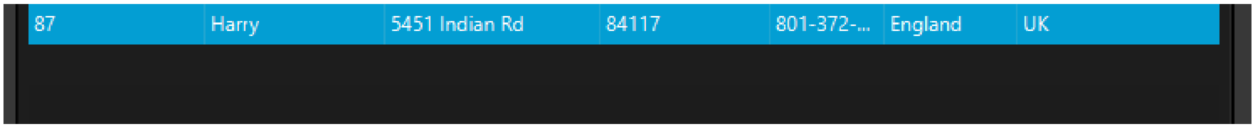
Adding A New Customer

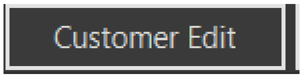
Addition of a new scheduler customer is accomplished by filling in every single one of the information fields and combo boxes. The only field not required by the user is the customer ID since that is autogenerated. Once all fields have been input with information from the user, click on the “Add Customer” button. Select yes to the confirmation dialog asking if the user is sure. The table view then refreshes itself, showing the newly added customer as part of the records.



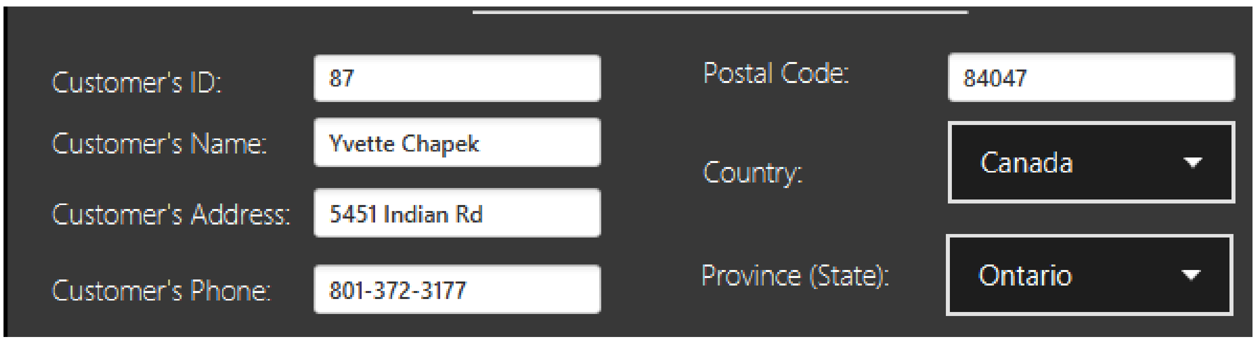
Making Edits To An Existing Customer

To update information about an already existing customer, select your customer of choice in the table view below. Then click the “Customer Edit” button. This will fill in the fields and combo boxes with the selected customer’s information. Make any changes to the information as you require, then click “Save To Records” to save the changes made to the customer. Select yes within the confirmation dialog, and the table view row will update with your modified customer data.





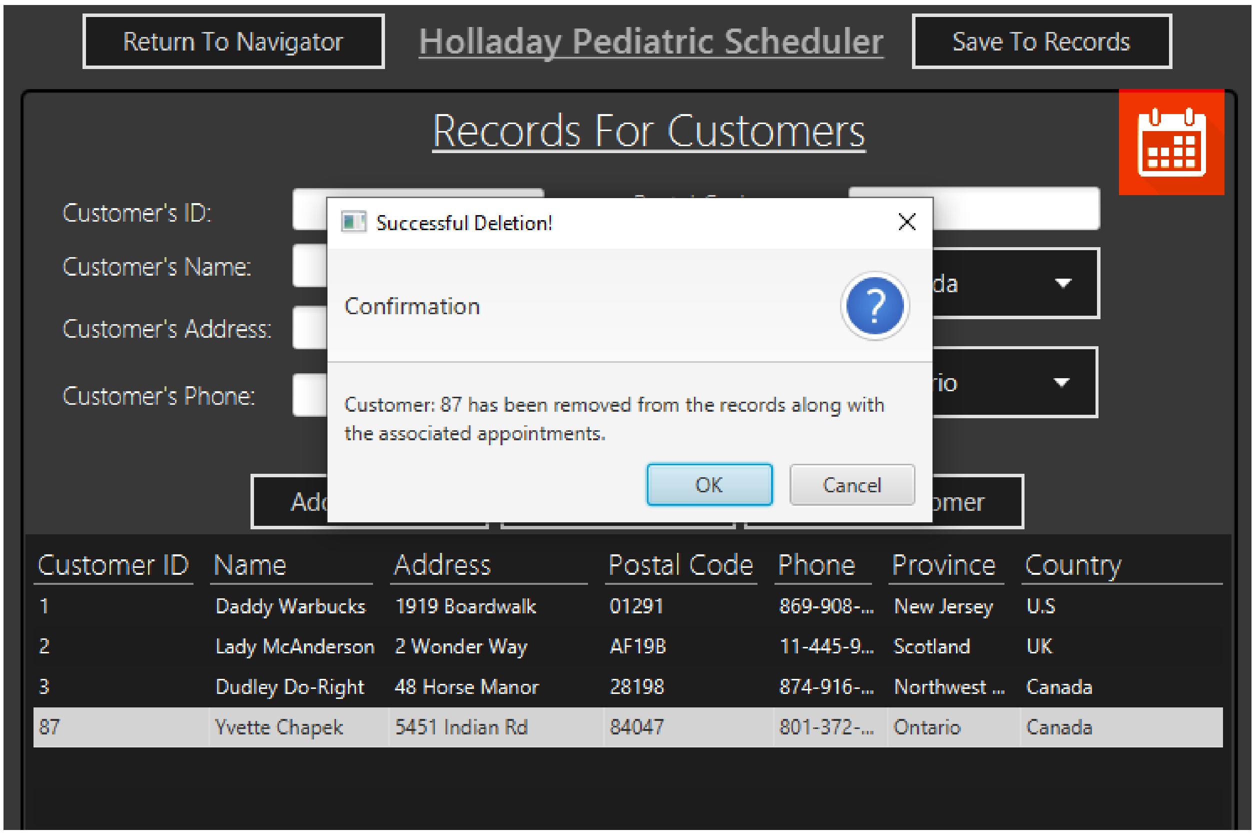
Making Edits To An Existing Customer



Removing A Customer From The Records

To delete a customer from the scheduler records, select your choice from the table view down below. Click the “Remove Customer” button, and click Yes in the confirmation dialog if you’re sure about this decision. Not only will the customer be wiped from the records, but all appointments associated with him or her as well. The user will then receive a confirmation dialog about the successful deletion of the customer.

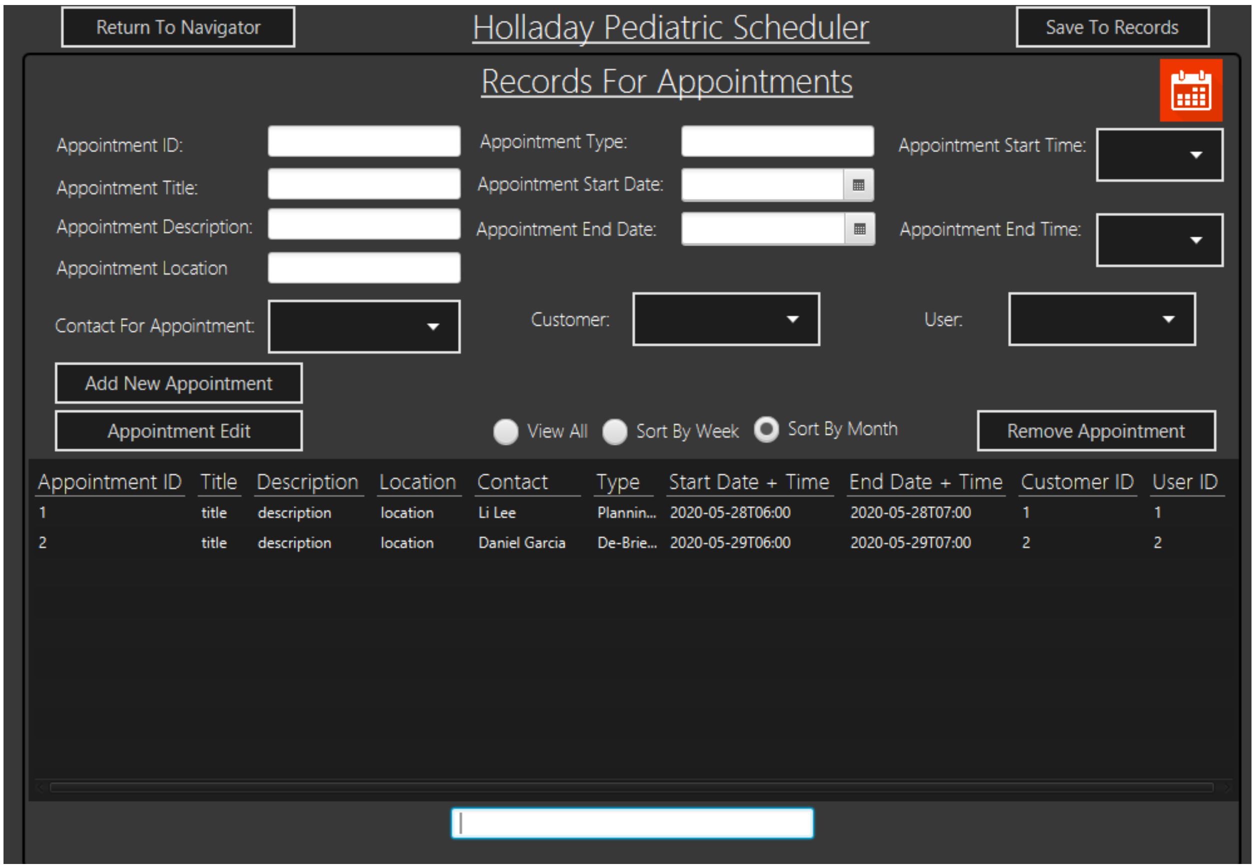
Removing A Customer From The Records



Managing And Viewing Of Scheduler Appointments

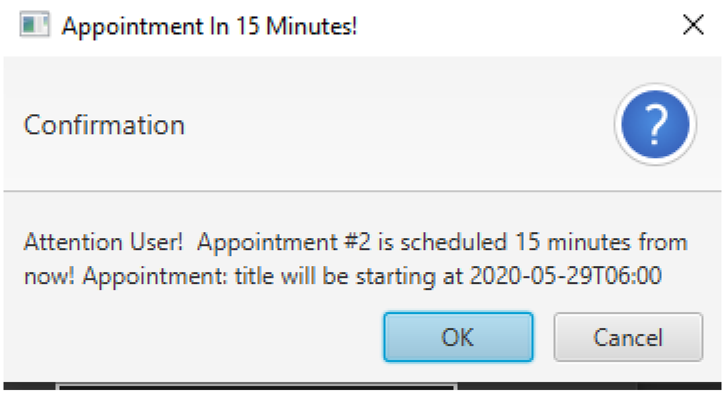
The Appointments page is where users, customers, and employees alike can view pediatric appointments and display their information. New appointments can be added to the records. In addition, pre-existing ones can be modified and then updated with new data. The table view refreshes itself after any addition, update, or deletion action is performed, informing the user of changes made to the records.

Appointments Page



Appointment Notification

Upon first opening the Appointments page after logging in, the user is notified of an appointment starting 15 minutes from now. This exists to remind users or customers of a scheduled appointment so that they can arrive on time and not miss it. If no appointments are present, then the alert dialog will inform the user that no appointments are scheduled for now.

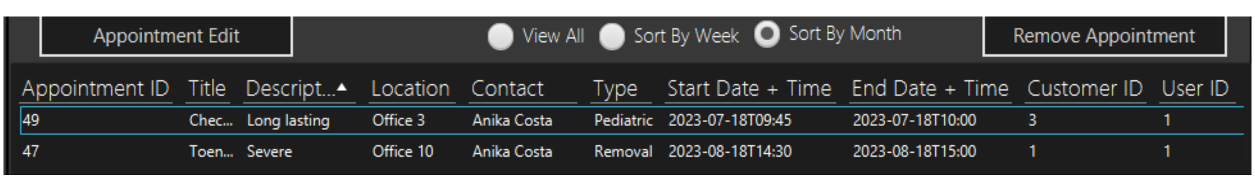


Searching For Appointments

At the bottom of the Appointments page is a search field that can look up a specific appointment by its name or associated ID. Partial fragments of a name will also be interpreted by the search function. Type in the name of the given appointment, and the table view above will display a result that matches the given search. If the search doesn't recognize the values input by the user, then an alert will notify the user of their search not returning any results.

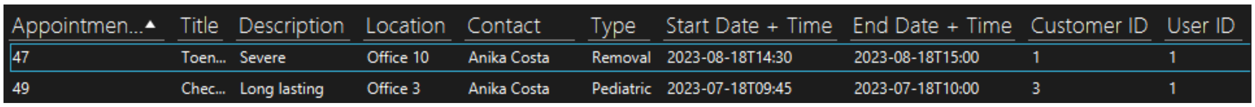
Sort Appointments By Week Or Month

By default, the user views all appointments in the records. If the user wants to see them sorted by week or month, they can select the respective radio buttons above the table view. The table view also allows the ability to sort the appointments in ascending and descending order. Anytime the user wants to view all appointments again, they can select the "View All" radio button.



Appointment ID	Title	Descript...	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1

To switch between ascending and descending appointment sorts, click on a column of your choosing, and the table view will refresh with the appointments sorted in ascending or descending order.

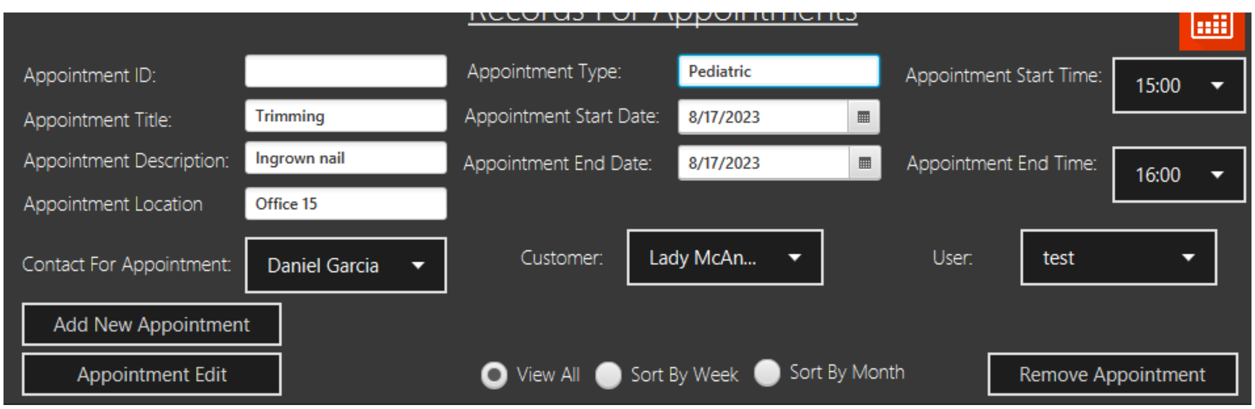


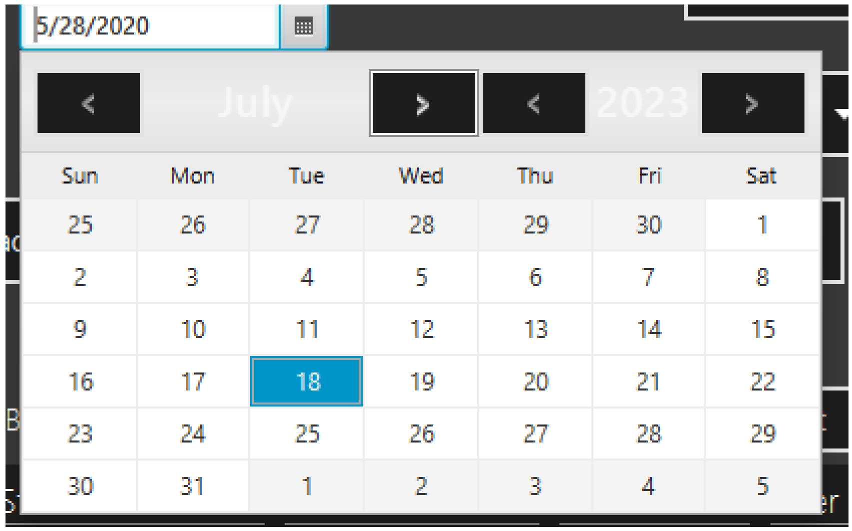
Appointmen...	Title	Description	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1

Adding A New Appointment

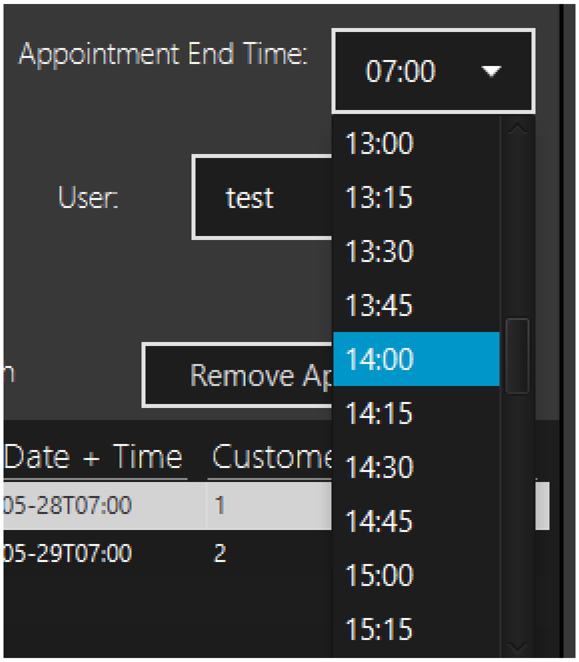
Addition of a new scheduler appointment requires the user to fill in every single one of the information fields, date pickers, and combo boxes. The only field not required by the user is the appointment ID since that is autogenerated. Once all fields have been input with information from the user, click on the "Add New Appointment" button. Select yes to the confirmation dialog asking if the user is sure. The table view will then update itself, showing the newly added appointment as part of the records.

Adding A New Appointment

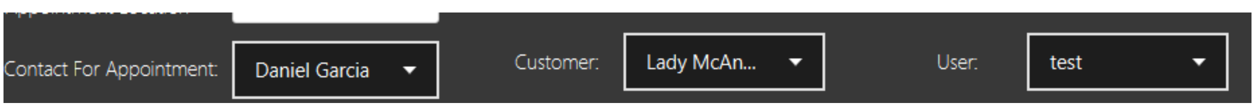




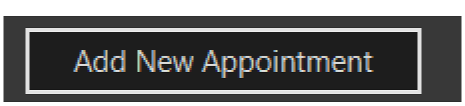
For the appointment start date and end date, there are date pickers that must be utilized by the user or customer. The left and right arrows at the top left corner allow the user to cycle through months, and the top right corner's arrows can cycle forward and backward between years.

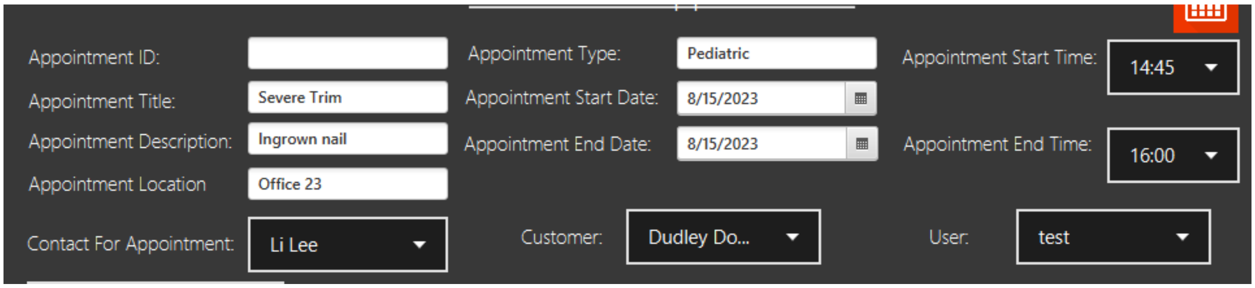


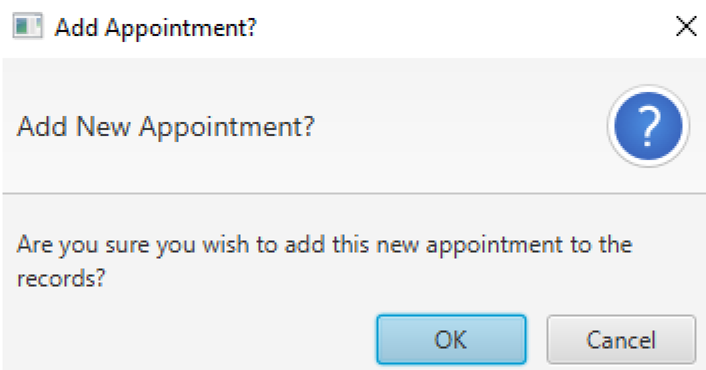
To set the appointment start time and end time, the user must select times in 15-minute increments. The start time combo box must have its value earlier than that of the end time. Alert dialogs are in place to make sure the start and end time values fit together and work with the requirements of an appointment. They cannot be the same value, and the end time cannot be before the start time.

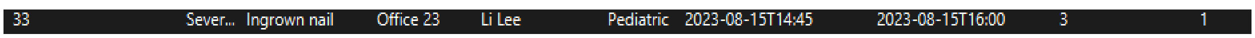


Selections must also be made for the current user of the scheduler, the contact (pediatrician) of choice for the appointment, and the customer that will be attending the appointment. Once all these combo box selections are made, the scheduler user is ready to create a new appointment. After clicking yes in the confirmation window, the table view refreshes with the newly added appointment as part of the records.





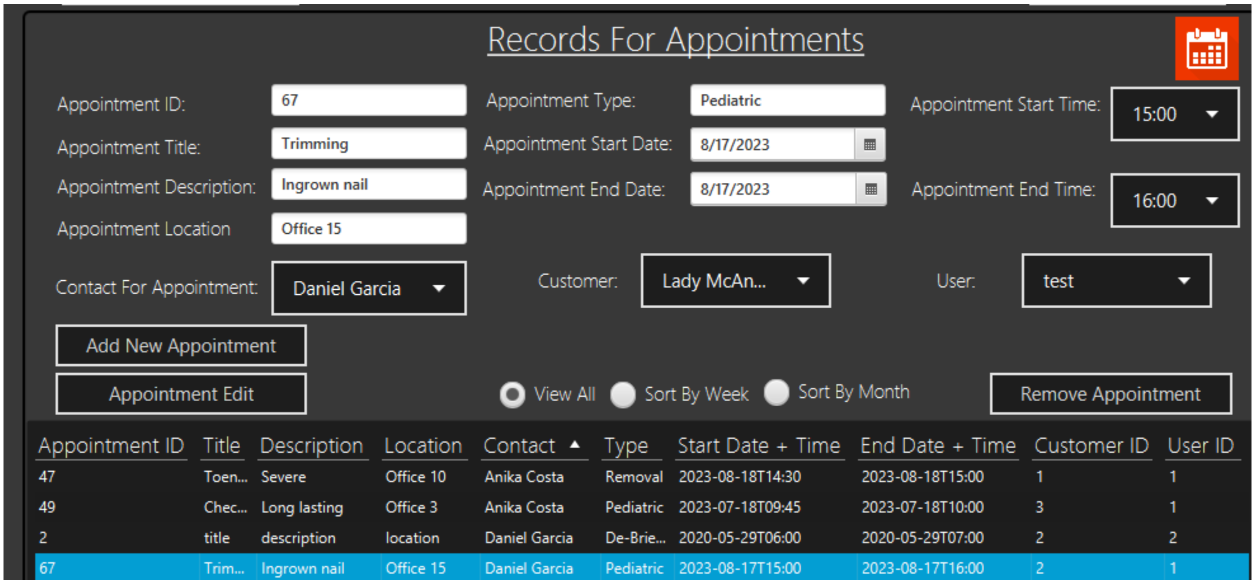


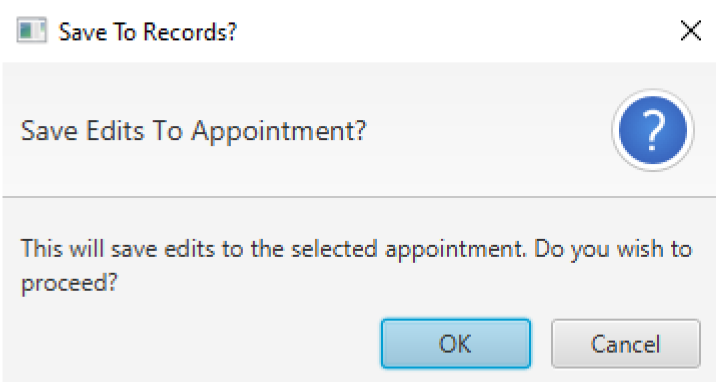


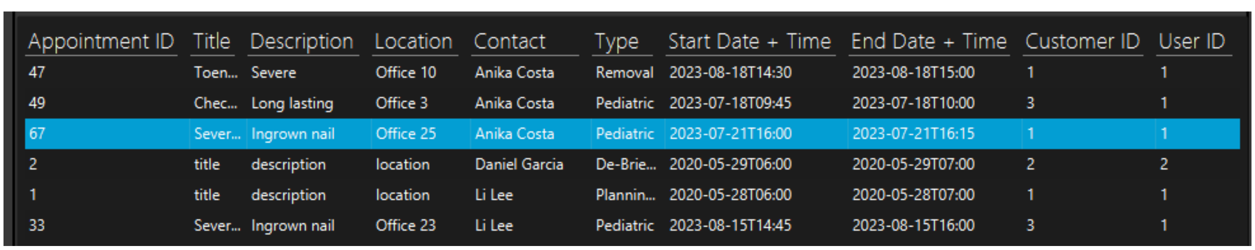
Making Edits To An Existing Appointment

To change a specific appointment's information, the user must click on an appointment within the table view. The fields, date pickers, and combo boxes will then be populated with the data from that selected appointment. From here, the user can modify the fields, and select different dates and times should they choose to. Edits may be useful if an appointment contact faces schedule conflicts and cannot join the customer. An alternative contact can then be selected so the customer can still attend the appointment. Once the edits are made, they can be saved by having the user click the "Save To Records" button. After clicking yes in the confirmation dialog, the table row will be updated with the new information.

Making Edits To An Existing Appointment







Removing An Appointment From The Records

To remove a given appointment from the scheduler records, select an appointment within the table view. Then click the “Remove Appointment” button. Click yes within the confirmation dialog box. The user will receive a notification about the appointment being successfully deleted, and the table view will refresh automatically. That appointment will no longer be present in the records.