

DOUGLAS COLLEGE

CENTRE FOR EDUCATIONAL AND INFORMATION TECHNOLOGY

WhiteBoard Instructions

By SHS (Fall 2021): Kenneth Iwuchukwu & Kunal Jeshang

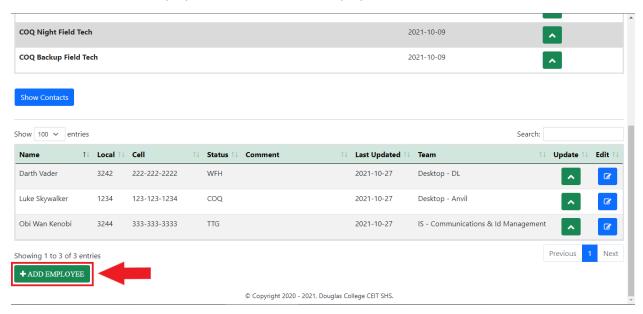
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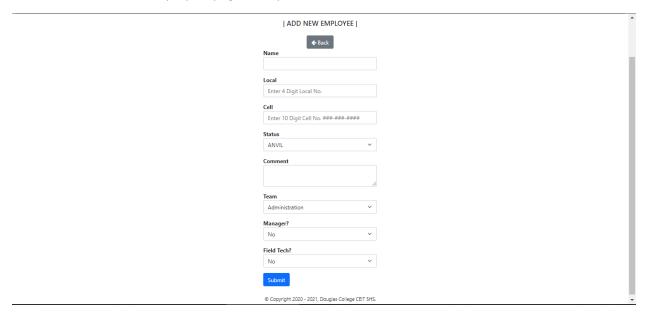
Employee table

Add an Employee

• Click the "Add Employee" button under the employee table.



• The 'Add New Employee' page will open.

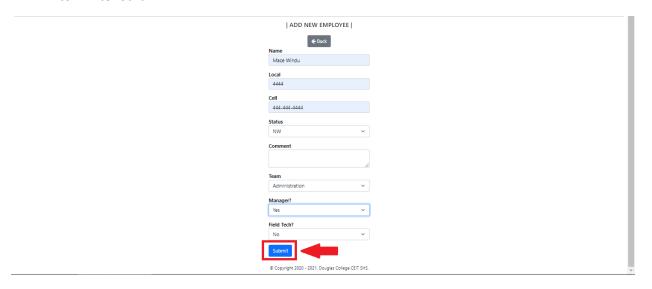


• Fill in the fields displayed to add an employee.

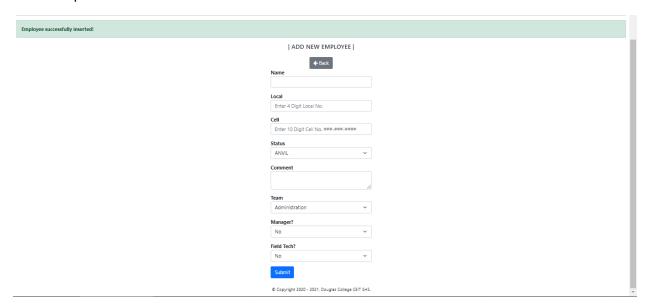
Field	Туре	Description	Notes
Name	Text Field	Name of the CEIT employee (typically, the first name & last name)	Should not be blank e.g. John Doe
Local	Text Field	Office phone number of the employee	Must be 4 digits: #### e.g. 1234
Cell	Text Field	Cellphone number of the employee	Must be 9 digits and must be in the following format: ###-###-#### e.g. 123-123-1234
Status	Dropdown list Options: ANVIL COQ NW OUT (done for the day) TTG WFH (work from home)	Refers to what campus the respective employee is working at. If the employee is done for the day or working from home, the field will reflect this. Below are all the possible options	The options are ordered in alphabetical order, so the default selection is "ANVIL"
Comment	Text Area	This field is used to notify the following: • Lunch break time • Vacation duration • Miscellaneous & urgent information regarding the employee	This field can be blank; it does not have to be filled in
Team	Multi-select Dropdown list Options: The various teams within the CEIT department e.g. Service Desk, Administration, IS – Data Centre, etc.	Refers to what team/s the respective employee is part of within CEIT	The options are ordered in alphabetical order, so the default selection is "Administration"

Manager?	Dropdown list	Refers to whether the respective employee is	Default selection is "No" as not every employee is
	Options: • No	also a manager of the team that they are a	a manager
	• Yes	part of	
Field Tech?	Dropdown list	Refers to whether the respective employee is	Default selection is "No" as not every employee is
	Options:	also a designated field	a field tech
	• No	tech	
	Yes		

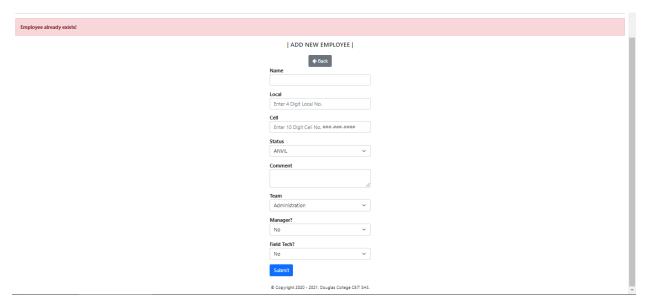
• Once you have filled in the fields, click the "Submit" button to add the newly created employee to WhiteBoard.



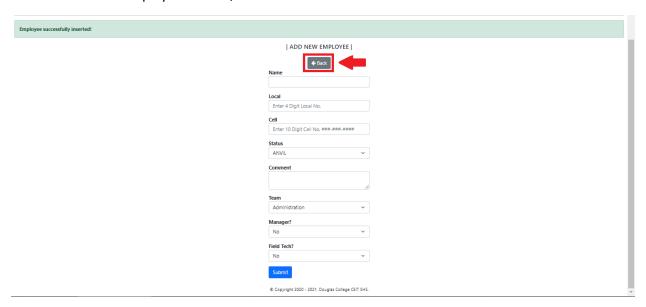
• If the insertion is successful, the fields will reset and a green colored banner will display at the top of the form.



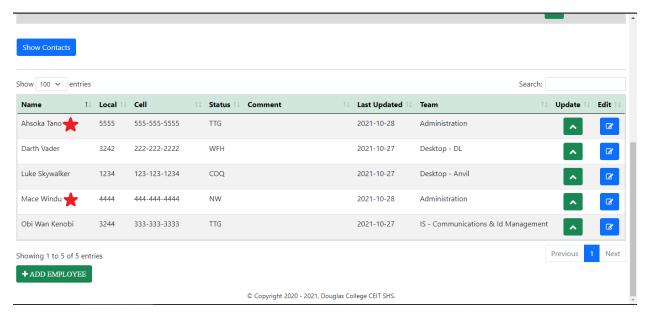
• If the employee that you are trying to insert already exists on WhiteBoard (i.e., you are inserting another employee with the same name) then a red banner will display at the top of the form, in turn, no insertion takes place.



• You can insert many employees into WhiteBoard using this page. When you are ready to go back to view all employee records, click the "Back" button.



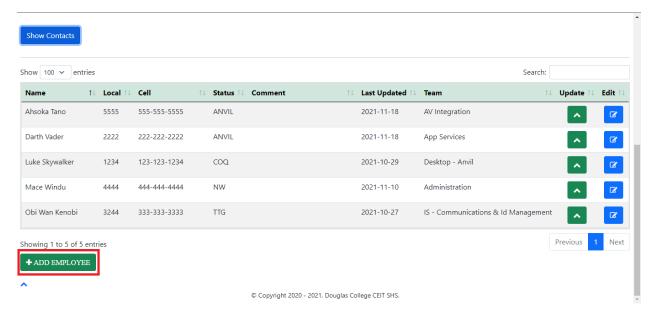
• You can now see both the newly inserted employees & existing employees in the employee table. Notice that the "Last Updated" column exists with the date. Any time a new employee is inserted, the column value changes to that of the current date.



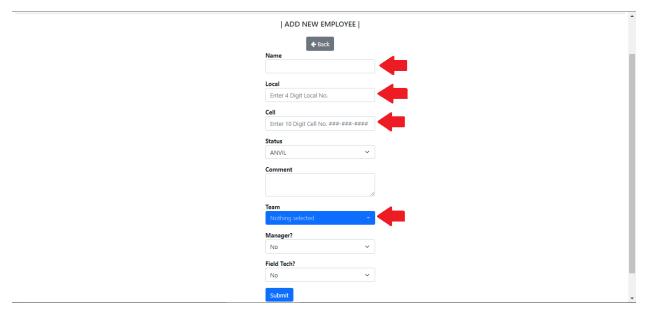
Add an employee that is part of more than 1 team

(Feature added November 18th 2021)

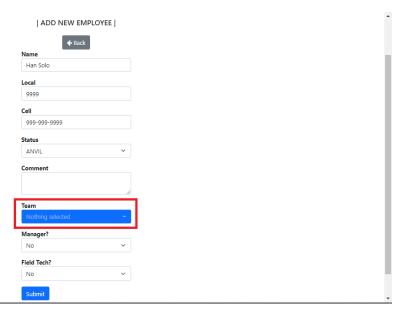
• Below the employee table, select the "Add Employee" button. You will then be redirected to the 'Add New Employee' page.



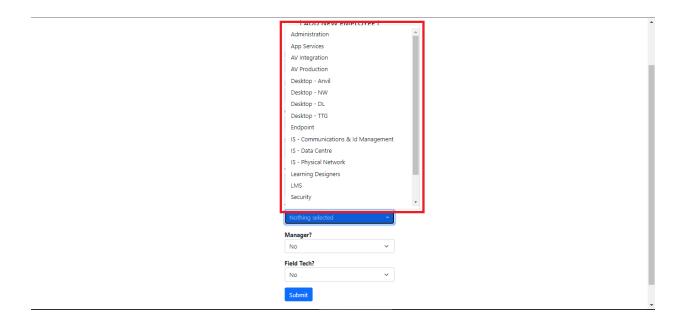
• You can now enter the new employee details. The "Name", "Local", and "Team" fields are required fields and must be in the appropriate format. If you press the submit button without filling in the required fields, you will not be able to proceed.



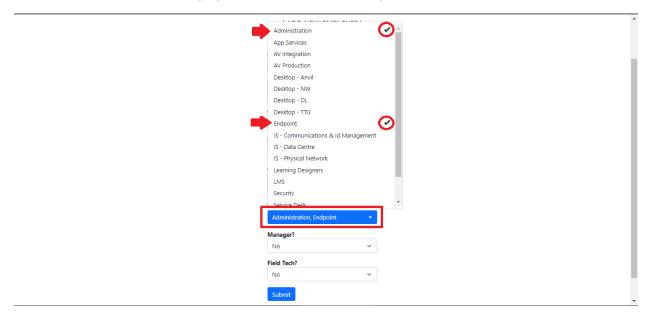
• To select more than one team for an employee, select the multi-select dropdown list colored in blue under the word 'Team'. By default, no team is selected in the multi-select dropdown list, thus "Nothing selected" will be visible.



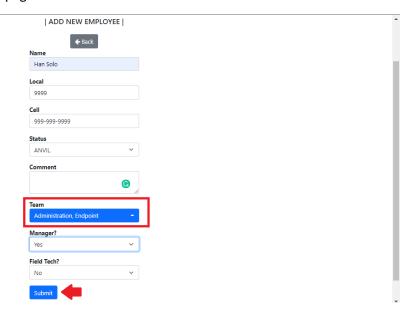
• The options within the multi-select dropdown list will now be visible. You can now choose one team or more than team by simply clicking on the respective team names.



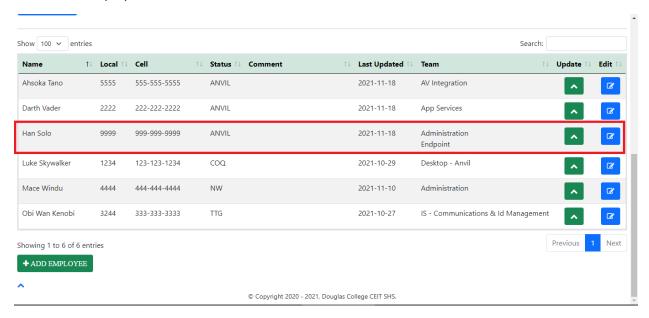
• For example, you want to select the teams 'Administration' and 'Endpoint', you have to click on the respective names and a check will appear next to them. The names of the selected teams will also be displayed in the blue box as well. If you select more than three teams, then not all team names will be displayed, but this will not affect your selection.



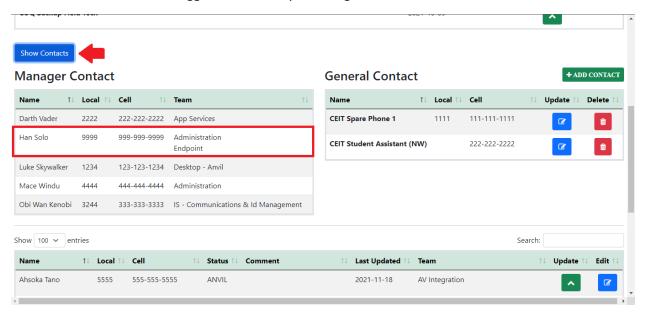
After you are done selecting the teams, you can click any part of the screen outside the
multiselect dropdown. Then fill out all the other fields and press the "Submit" button to insert
the employee. A banner message will be displayed at the top of the screen indicating that the
employee has been successfully inserted. The fields on the page will reset. Press the "Back"
button to go back to the main page.



 Once on the main page, the newly inserted employee that is part of two teams can be seen in the employee table.

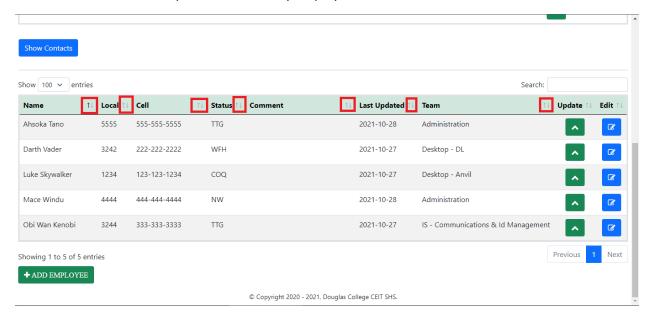


• If the newly inserted employee is a manager, they will also be visible in the manager contact table which can be toggled into view by selecting the "Show Contacts" button.

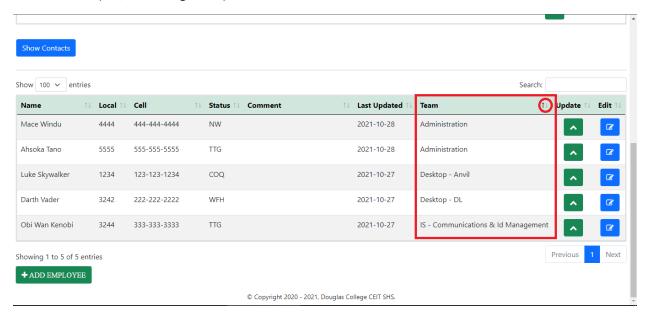


Sort by the employee table by column values

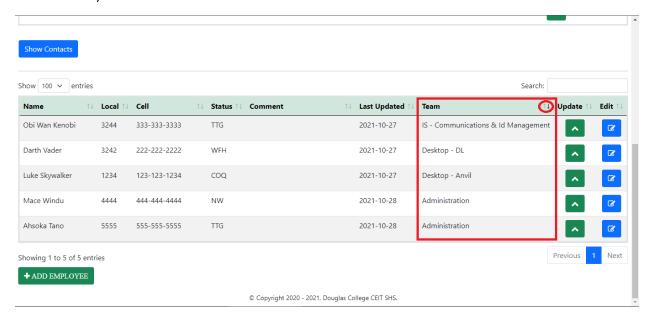
• You can sort the records in the employee table by the respective columns in both ascending & descending order by selecting the arrow icons next to each column heading. By default, the table is sorted in alphabetical order by employee name via the "Name" column.



• For example, if you would like to sort the employee table by "Team" you have to select the arrow icons next to the "Team" column heading. When you select it, the upward arrow will be bold and the downward arrow will be faded out. In turn, ordering the records in alphabetical order (i.e., ascending order).

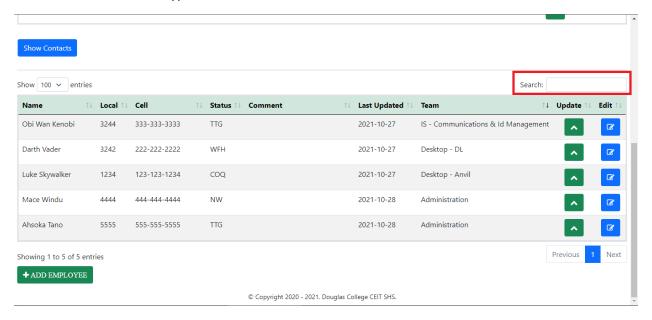


• When you select the arrows icon again, the downward arrow will be bold and the upward arrow will be faded out. In turn, ordering the records in reverse alphabetical order (i.e., descending order).

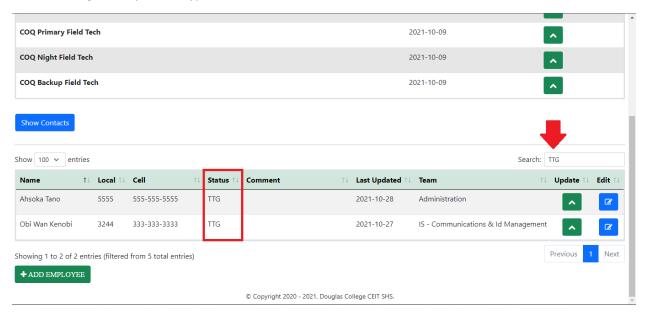


Search for specific records in the employee table

• If you would like to search for an employee record based on a specific field, such as employee name, you can type it in the search bar and the employee table will instantaneously filter out based on what is typed.



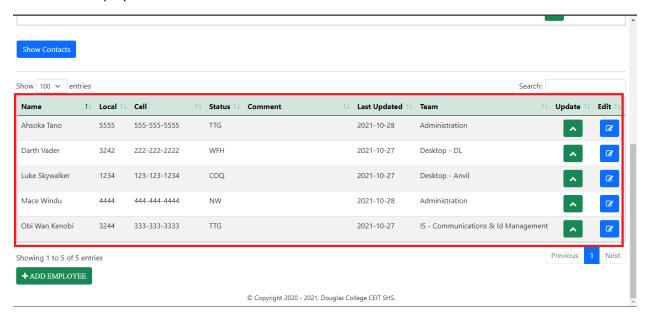
• For example, if you would like to filter the table to only show those employees with "Status" being 'TTG', you can type 'TTG' into the search bar.



• If you want to see all the employees in the employee table, simply set the search bar to be empty. You could alternatively hover to the search bar press the cross that appears to set the search bar to be empty.

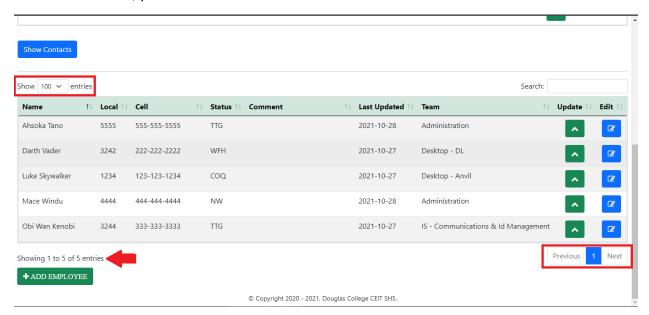


• As can be seen below, after setting the search bar to empty, all employee records can be seen in the employee table.

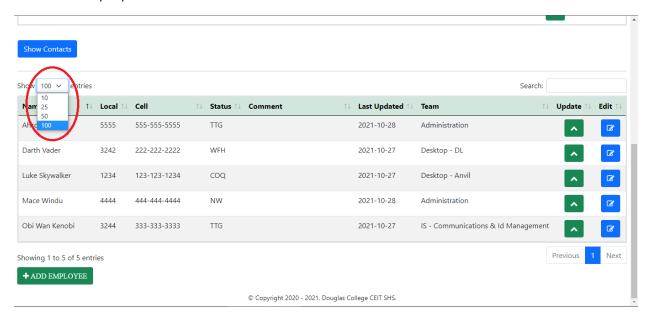


Pagination of employee records

Notice the that the maximum number of entries is 100. This means that the maximum number
of records displayed in the employee table is 100. If there are more than 100 records, then you
would have to select the "Next" button to see the remaining records. If you need to see the first
100 records, you must select the "Previous" button.

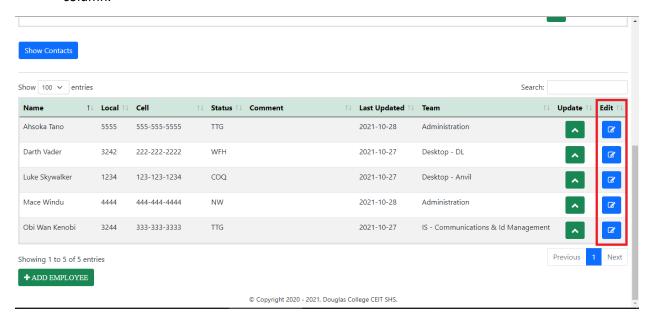


• By default, the first 100 records of the employee table will be shown. If you would like to reduce the number of records, please select the dropdown list showing 100. The other available options are 10, 25, and 50.

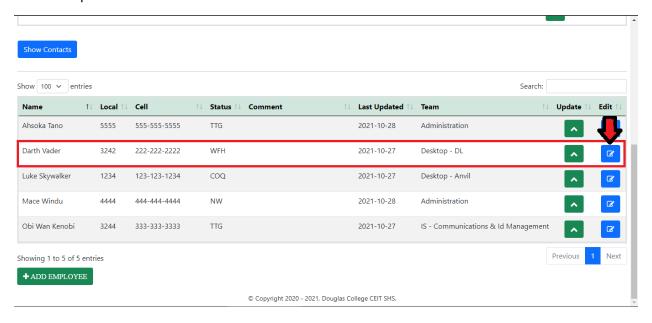


Edit employee details

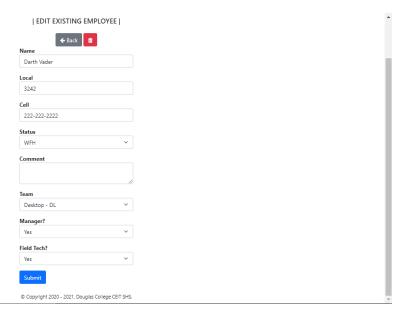
• If you would like to edit the details of a respective employee record, select the icon in the 'Edit' column.



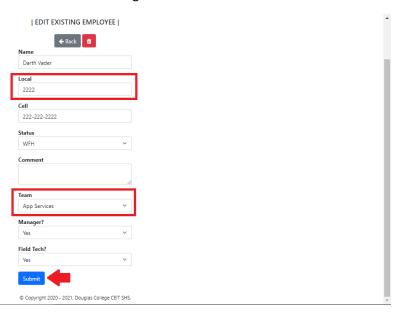
For example, the employee named "Darth Vader" needs to change their local office phone
number because they recently changed teams, they would select the 'Edit' column icon in their
respective row.



• The 'Edit Existing Employee' page will open with the "Darth Vader's" details already filled out in the respective fields.



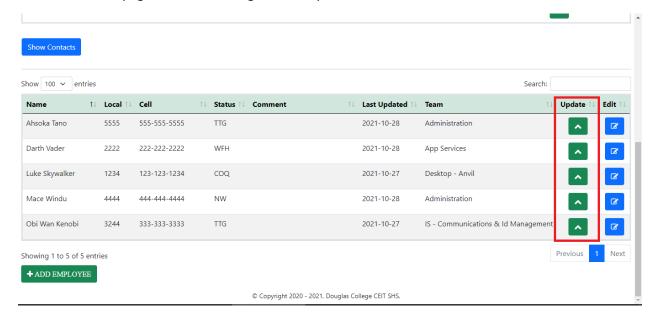
• Darth Vader would then edit the fields they want to make changes to. In this case "Local" and "Team" to change their office phone number and team within CEIT respectively. Then they would press the "Submit" button to confirm the changes.



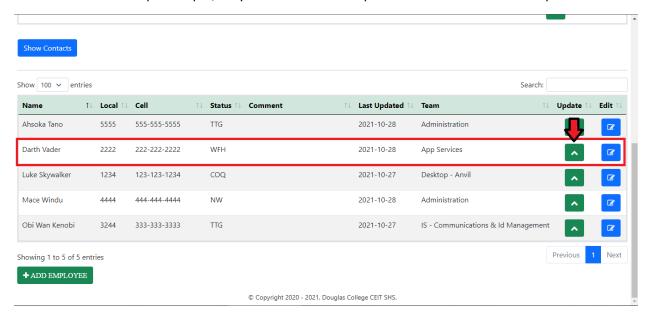
• Note - Also note that if Darth Vader decides to not make any edits for whatever reason, they can simply select the "Back" button. They will then be redirected to the main page.

Update Status/Comment of an employee record

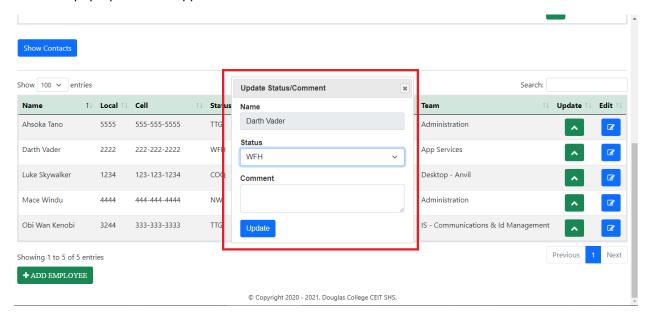
• Upon pressing the "Select" button in the 'Edit Existing Employee' page, you will be redirected to the main page where the changes made by Darth Vader will be visible.



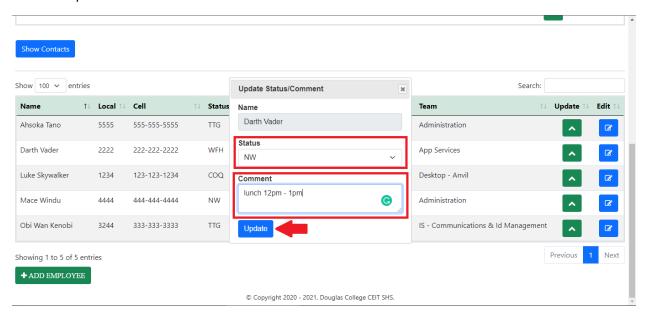
• For example, the employee named "Darth Vader" wants to change their status to indicate they are now going to be working at the New Westminster campus and they are taking their lunch break from 12pm to 1pm, they would select the 'Update' column icon in their respective row.



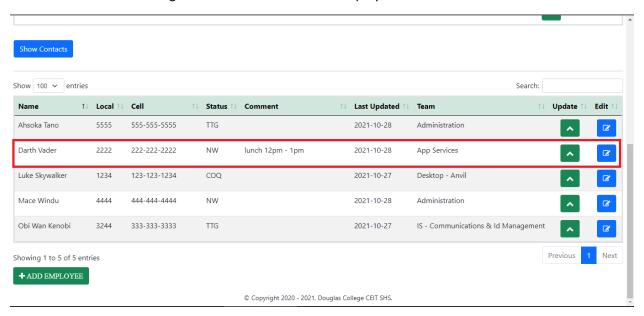
• A pop-up will then appear as shown below.



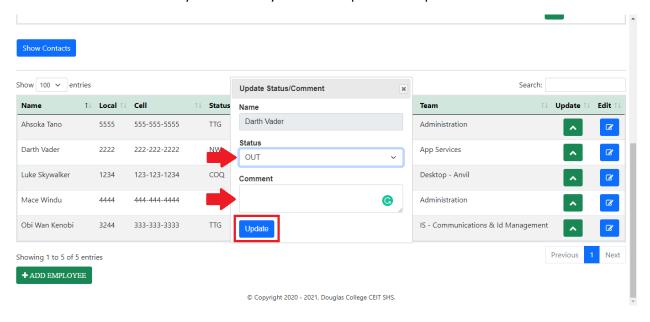
 Now, Darth Vader will be able to change their current work status and put in a comment for when they are taking their lunch. Once the required changes are made, they would press the "Update" button.



• The reflected change will now be visible in the employee table.



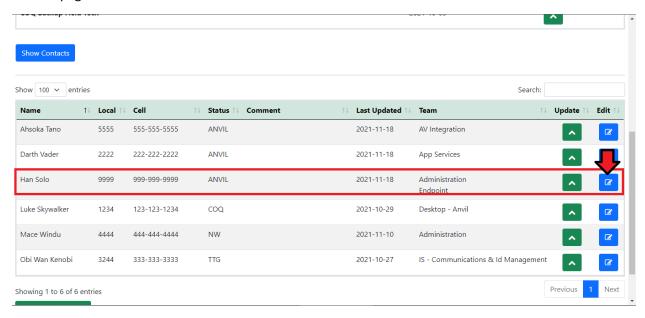
• When Darth Vader is done for the day, they would update their status to "OUT" and remove their comment if they want to. They then would press the "Update" button.



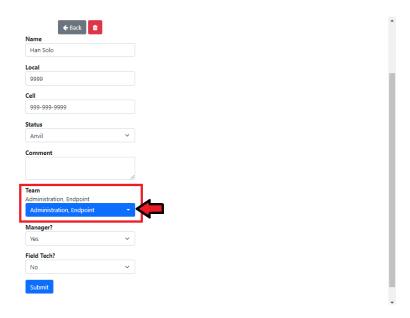
Update an employee that is part of more than 1 team

(Feature added November 18th 2021)

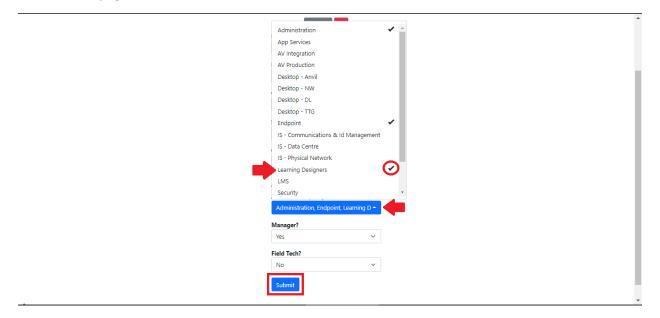
If you would like to add/remove the teams an employee is a part of, select the icon in the 'Edit' column of the respective employee's row. You will be redirected to the 'Edit Employee Details' page.



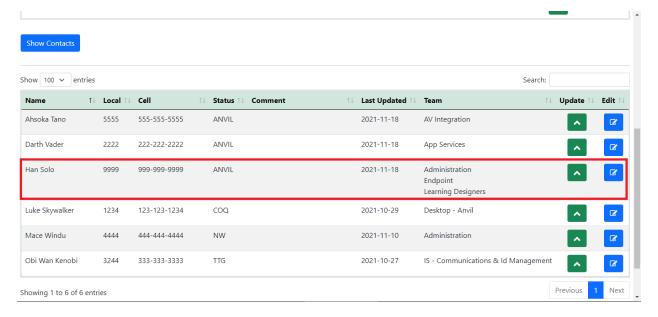
• Now in the 'Edit Employee Details' page, notice that all the fields are pre-filled with the selected employees data. Below the word 'Team', is the full list of teams the employee is assigned to is visible as well so that the multi-select dropdown list does not need to be toggled to view all the assigned teams (if the number of teams is more than three). To change the teams assigned to the employee, select the multi-select dropdown list.



• The multi-select dropdown list will expand and show a list of all the teams and will have check marks next to teams that the selected employee is already a part of. For example, the employee is now also a part of the 'Learning Designers' team, so you add the team. You select the team you want to add. To remove a team, you select the team that already has a check mark next to it. After all the changes are made press the "Submit" button and you will be redirected to the main page.

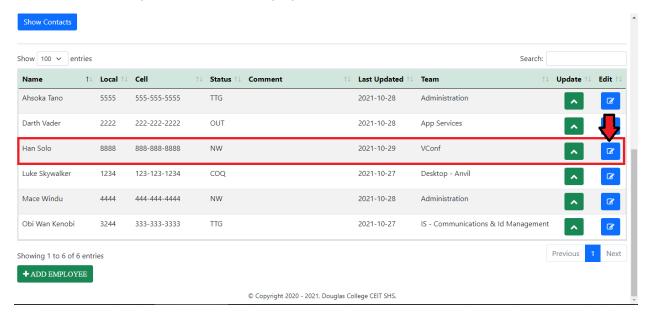


• The changes made will now be visible in the main table.

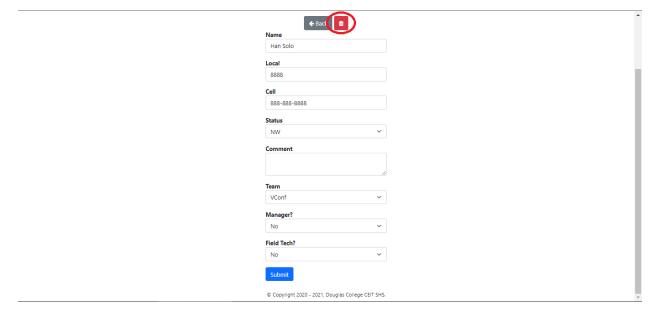


Delete an employee

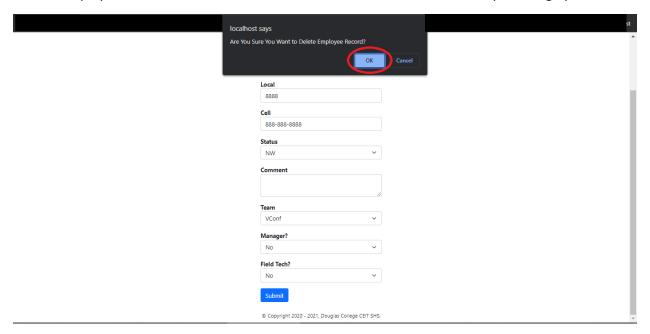
• An employee can be deleted from WhiteBoard entirely by first selecting the "Edit" icon in the respective row of the employee. For example, if you would like to remove the employee named "Han Solo" from WhiteBoard, as they either resigned or were fired, you would select the edit icon their respective row of the employee table.



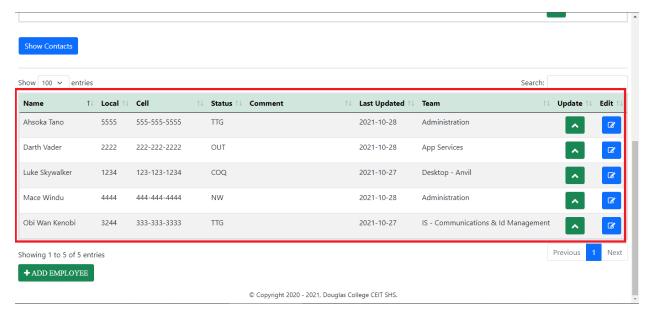
• You will then be redirected to the 'Edit Existing Employee' page. To delete Han Solo from WhiteBoard, you simply must press the button with the trash can icon.



• A browser pop-up will appear to ask whether you whether you are sure that you want to delete employee. You would select "OK" to confirm the deletion, or "Cancel" if you change your mind.



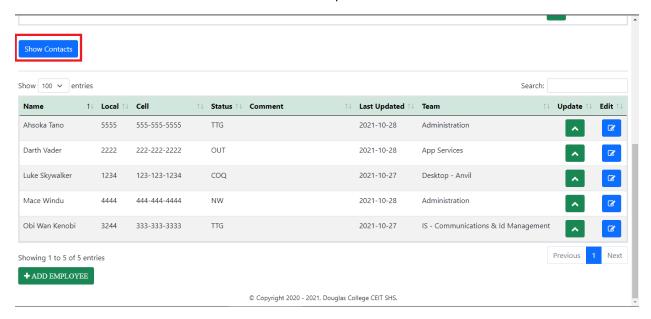
After selecting "OK" on the browser pop-up, you will be redirected to the main page where the
entire employee table will be visible, and the deleted employee will not be seen anymore.



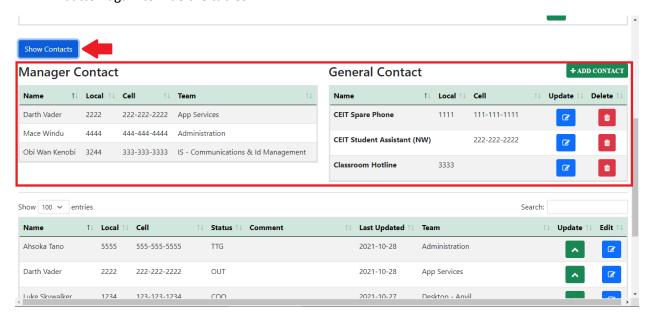
Manager Contact table

Toggle view the table

• By default the manager contact (and general contact tables) are hidden by default. To view the tables the "Show Contacts" button should be pressed.



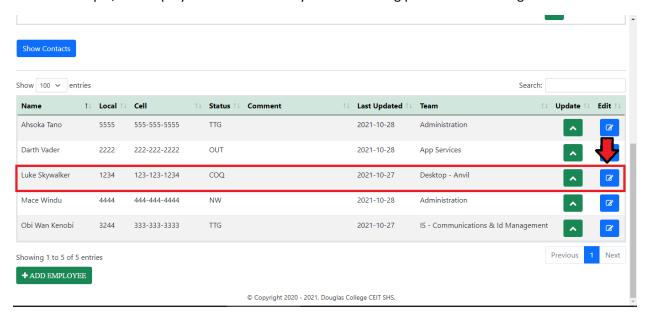
• Once the "Show Contacts" button is pressed, the tables can be seen. Press the "Show Contacts" button again to hide the tables.



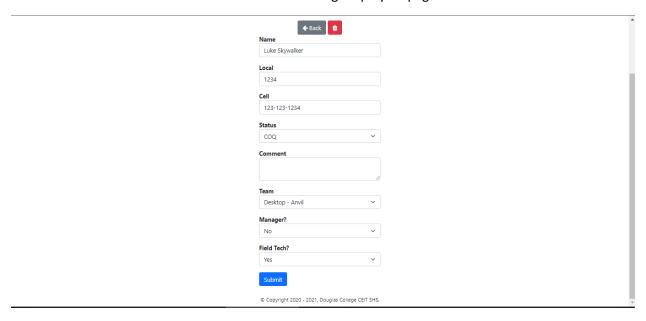
• Also note that the manager contact table can be sorted the same way the employee table is sorted (i.e., using the arrows icon next to the column headings.

Add a manager to the manager contact table

• If an employee is going to become a manager for their respective team, they would have to edit their details using the employee table by selecting the "Edit" icon in their respective row. For example, the employee named "Luke Skywalker" is being promoted to manager of their team.



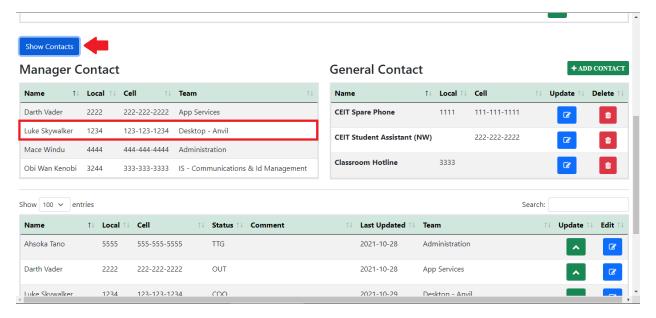
• You will then be redirected to the 'Edit Existing Employee' page.



• You then change the 'Manager?' field from "No" to "Yes". Then the "Submit" button would have to be pressed to confirm the changes.



 You will then be redirected back to the main page. The manager contact table is hidden by default. So you will have to press the "Show Contacts" button to show the manager contact table. Luke Skywalker along with his local office number, cellphone number and team will be visible.

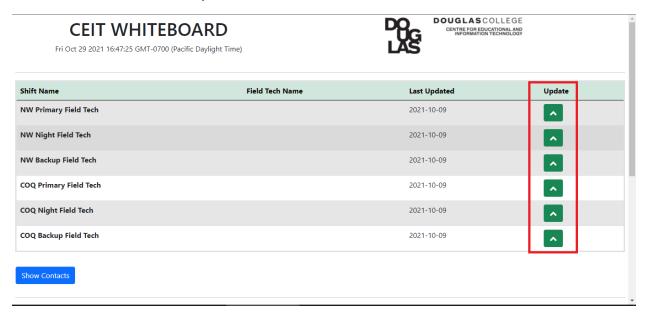


• If an employee is not going to be a manager anymore then the same steps as aforementioned would be performed. You simply have to change the "Manager?" field from "Yes" to "No". In turn, that employee will not be visible in the manager contact table anymore.

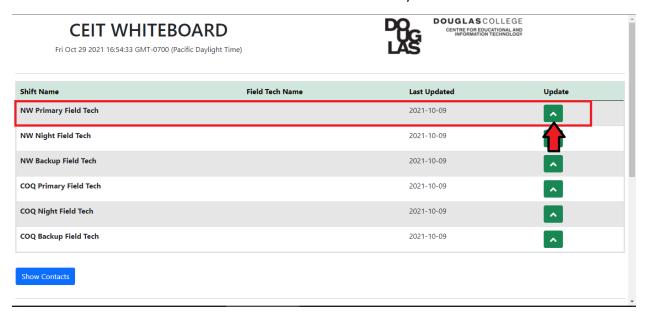
Shift table

Assign a field tech to a shift

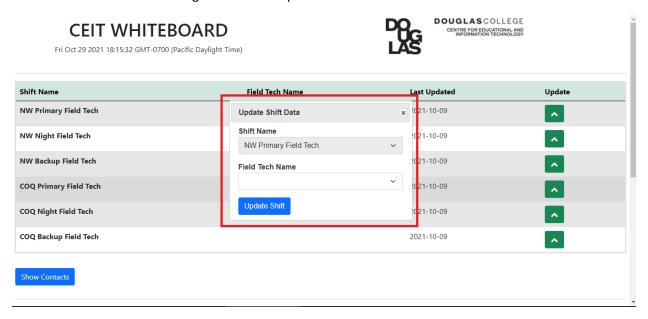
• If you need to assign an a field tech to a shift, you would do so by selecting the icon in the Update column of the respective row of the employee. For example, you need to assign a field tech to the "NW Primary Field Tech".



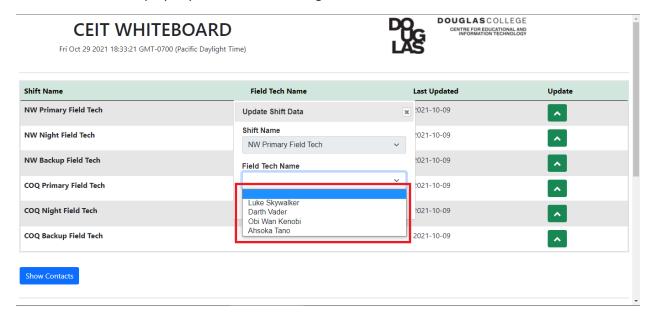
• Select the icon arrow icon in the same row as "NW Primary Field Tech".



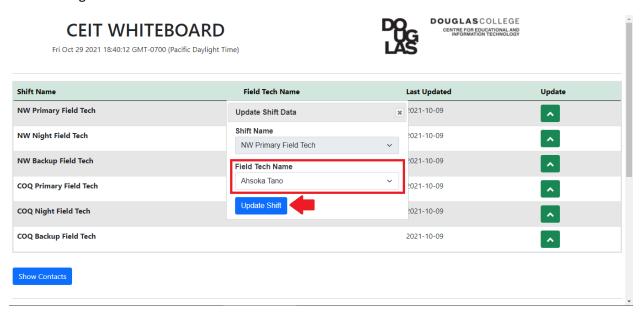
• A pop-up will appear on the screen. As the "Field Tech Name" field is blank, it means that a field tech has not been assigned to that respective shift.



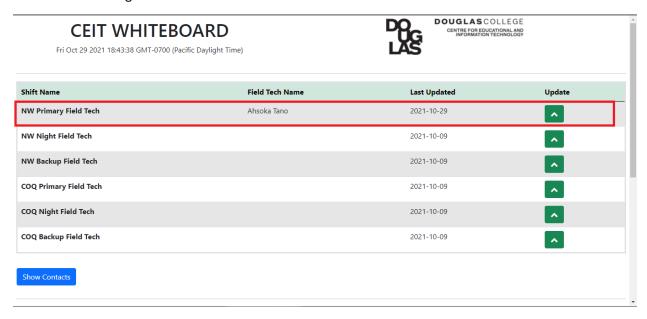
• Selecting the dropdown will show a list of employees that are designated field techs. You can select the employee you would like to assign to the shift.



• After selecting the field tech for the shift, press the "Update Shift" button to confirm the assignment.



• After pressing the "Update Shift" button, the pop-up will disappear and the field tech selected will be assigned to the shift.

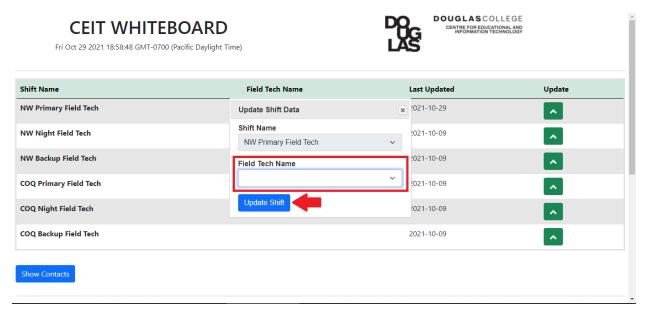


Read the shift table

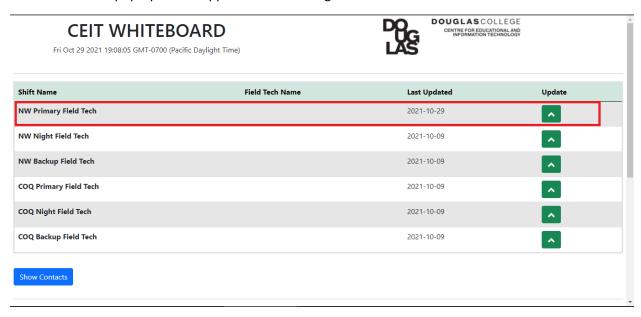
Field	Туре	Description	Notes
Shift Name	Text field	Name of shift	This field is pre- inserted, and it cannot be deleted
Field Tech Name	Options: • Employees in the employee table that have set the "Field Tech?" field to be 'Yes' • Blank option refers to no employee assigned to a shift yet in the morning, or due them all being done for the day	Employees that are designated field techs	Not a mandatory field, but if an employee's "Field Tech?" is changed to 'No' then they will not appear in the dropdown list when updating a shift
Last Updated	Text	Date when the shift was last updated	This field is auto- inserted

Remove a field tech from a shift

• When a field tech is done for the day, the "Field Tech Name" field should be set to the blank option. The "Update Shift" button should then be pressed to confirm the change.

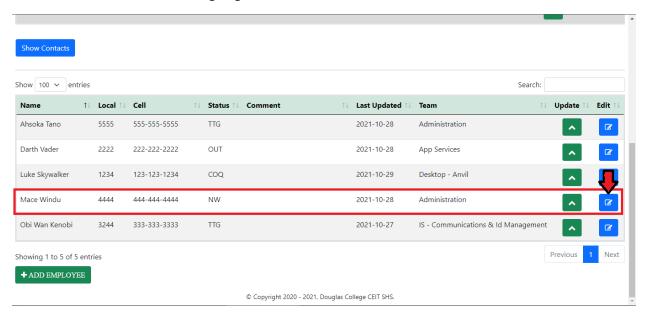


• Then the pop-up will disappear and the change made will be visible.

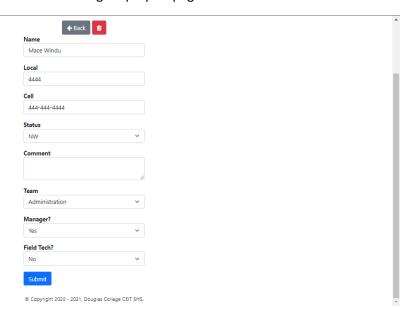


Add an employee as a field tech

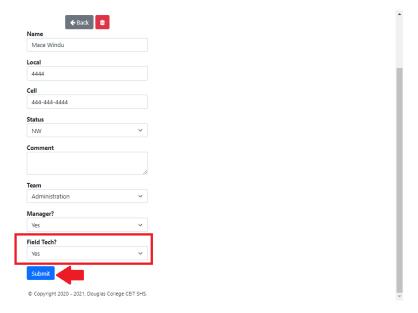
• If an employee is going to become a field tech, they would have to edit their details using the employee table by selecting the "Edit" icon in their respective row. For example, the employee named "Mace Windu" is going to be a field tech.



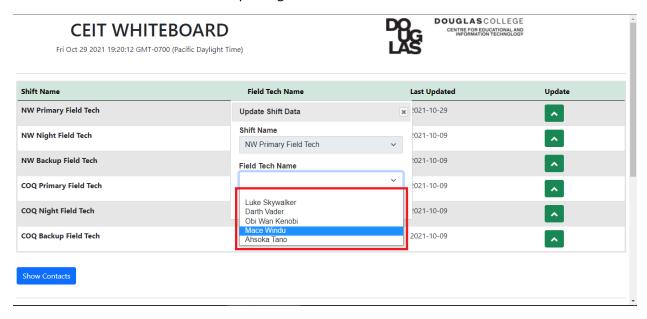
• You will then be redirected to the 'Edit Existing Employee' page.



• You then change the 'Field Tech?' field from "No" to "Yes". Then the "Submit" button would have to be pressed to confirm the changes.



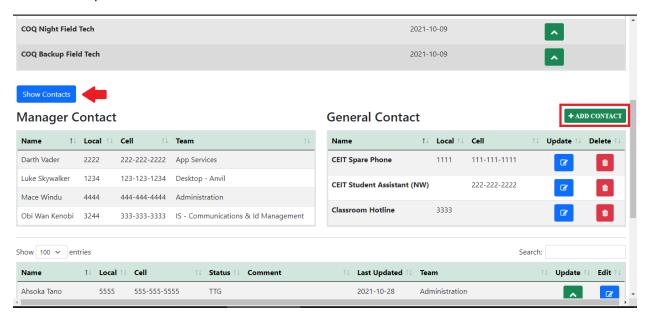
• You will then be redirected back to the main page. The newly designated field tech will be available for selection when updating the current field tech on shift.



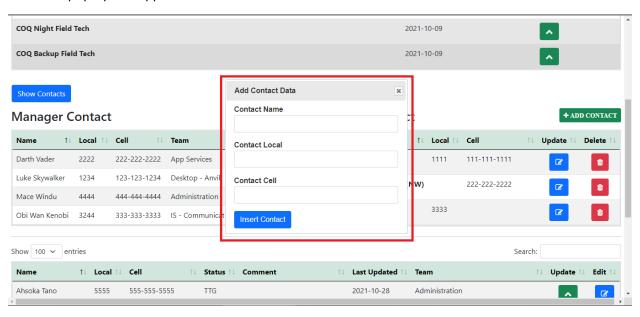
Contact table

Add a contact to the general contact table

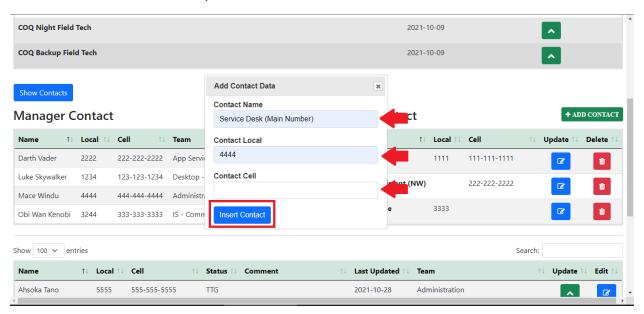
• To add a contact, first press the "Show Contacts" button to show the general contact table. Then press the "Add Contact" button.



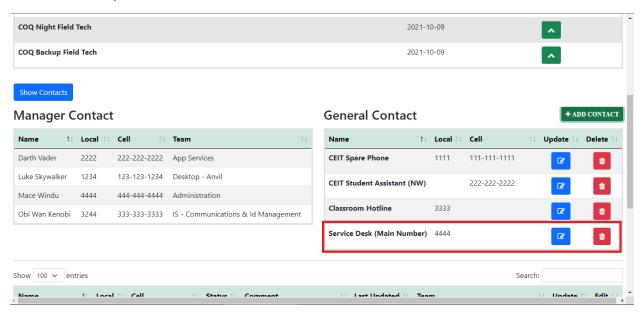
A pop-up will appear.



• You must fill in the fields and then press the "Insert Contact" button. Note that the "Contact Name" field is mandatory.



The newly inserted contact will then be visible in the table.

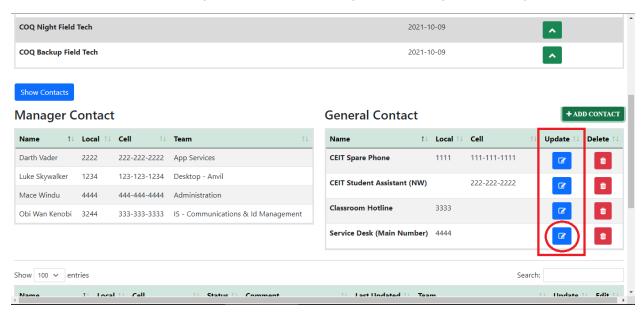


Read the general contact table

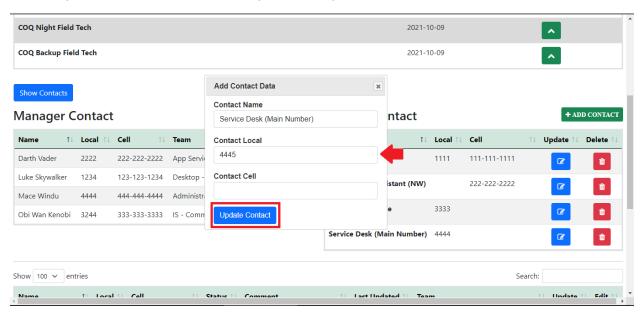
Field	Type	Description	Notes
Name	Text field	Name of the	This field cannot be
		team/point-of-contact	blank
Local	Text field	Local office number	This field is not
			mandatory
Cell	Text field	Mobile phone number	This field is not
			mandatory

Update details of a record in the general contact table

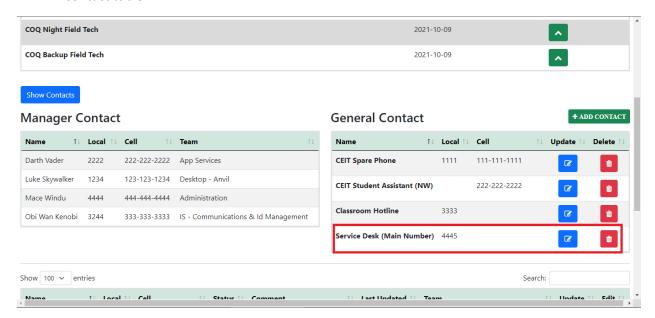
• Select the icon in the "Update" column of the respective record you want to update.



• A pop-up will appear and the contact fields would be filled out. You have to make the required updates to those fields, and then press the "Update Contact" button.

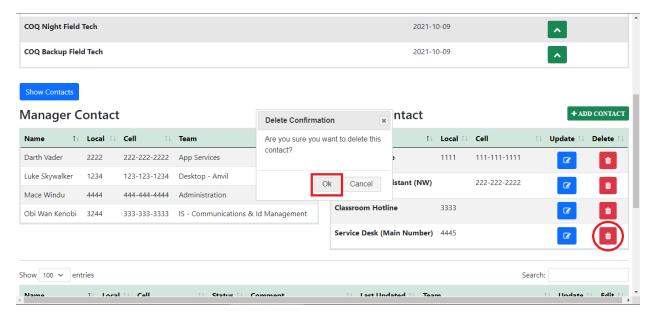


• The pop-up will then disappear. The updates made to the contact record will be visible in the contact table.



Delete a contact record from the table

• To delete contact record from the general contact table, you have to select the icon in the "Delete" column in the respective contact record. A pop-up will appear on the screen asking you to confirm your decision to delete the contact record.



 After selecting "Ok", the pop-up will disappear, and the general contact table will not show the newly deleted record.

