**User Manual for you…..the Teacher (the Boss)**

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***Projects Tab***

***Set Up***

1. First and foremost you will need to create a project. This is under the Projects tab.
   1. Also, if you are not able to even login, then this means that you are not a current teacher in adit. You will need to get another teacher, who is able to login, to add you to adit.
2. As a note: only one teacher can create one active project for the entire semester, so either you or another teacher can create this project.
3. If there is not a current project, click on the link that says “Create a New Project,” otherwise another teacher has already beat you to the punch and has created the active project. If that is the case, then you can bypass these instructions and go to the Students page under the Manage Users tab.
4. A form will come up and this is where you will set up the entire project for the semester.
5. Fill out the form to create a new active project.
   1. You can determine if you want the project the current year or next year, either in the Fall or Spring semester, and either the Calendar or Arrow.
   2. For the “Client Restrictions” section:
      1. This is where you will determine the restrictions on how many of the high, medium, or low priority clients a student can select. Or if you want just a general maximum of any type of client for each student to select, you can do that here as well.
      2. The drop down boxes labeled High, Medium, and Low are the restrictions for a student:
         1. If you only want the student to select at most 2 high, 2 medium, and 0 low, then you will choose the number accordingly for each drop down box.
         2. However, if you don’t care about the restrictions for a high, medium, or low priority client (they can choose however many clients they want), then choose the N/A option from the drop down box.
      3. The drop down box labeled Total is the maximum amount of total clients for a student:
         1. If you want the student to only have a certain amount of active clients at a given time, then choose the number accordingly.
      4. Keep in mind: If you want to prevent the students from getting clients while not changing the End Time, described below, you can choose the option of having zero for the Total. However, a student will need at least one client to start selling ads. So help them out and give them at least one client. ☺
   3. Then finally for the “Time Period When Students Can Choose Clients” section:
      1. This is where you will select the window of time for the students to select clients.
      2. For the Start Time, select the day and time you want to open the flood gates for the students to select their clients.
      3. For the End Time, you can select the day and time you want to kill the students opportunity to grab anymore clients. Now they will still keep their current clients and can work off of them, but they will not be able to select anymore clients to work on.
      4. Also, you can either type in the date and time with the format YYYY/MM/DD 00:00 AM/PM.
6. Click Create Project at the end when you are finished and you just created the project for the semester.
7. It will take a while for the project to be created, but you will then be redirected to the Students page under the Sections tab.

***Upkeep***

1. This is when you come back to the Projects tab and you want to make changes to the project or view an archived project.
2. By default, the active project will be always on display for you to quickly see the settings for the project.
3. If you want to edit the current project, then you can click on the “Edit Active Project Settings” link.
   1. The active project will be in the same form as when you first set up the project, with the addition of “Would you like to move this project to the archives?” option.
      1. You will use this option at the end of the semester when you want to completely end the active project.
      2. This will prevent the students from making any changes to their clients, and basically end their use of adit.
      3. When you decide to archive the project, you will be given the option to export the project to an Excel spreadsheet as well as leave a comment.
   2. Other than the archive option, here is where you can change anything about the project.
      1. You can change the Year, Semester, Project type, amount of Clients a student can choose, Start Time, and End Time.
      2. Theoretically, you should really only alter the amount of Clients a student can choose. Let’s say you started the project of only letting them have two clients from each priority (high, medium, and low). Then you decided after a month the students are doing well and you want them to have whatever client they want (do not care about the priority). Then here is where you would change the project to fit accordingly.
   3. If you altered the project at all and want to save it, then select “Update Project.”
4. To view an archived project, if any available, just select the project and click on the “View Selected Archived Project” button.
   1. This will show you everything that happened on this project, but you will not be able to edit any of the information.
5. You can also change the project from archived to active again if you do need to change anything.
   1. To do this, go click on “Details” next to the archived project.
   2. Click on the “Reactivate This Project” to make the project active again.

***Sections Tab***

***Students***

***Set Up***

1. Once you have created the project for the semester, you may now infiltrate all of the students. This is where you can add, promote (become a student manager), demote (return the manager to a regular student), deactivate (a student drops the class or is sent home early), or activate (if the student needs to be an active student in the project again) any student. You may also add or remove a student(s) from a team as well as assign bonus points here.
2. Here is where you will also create different sections, which in fact you will need to do first.
   1. To create a new section for yourself or another teacher, Click on the “Create a New Section” link under the “Change Section” dropdown box.
   2. This will take you to a page where you can select whatever section number you want and the teacher that will be assigned to the section.
   3. Do not worry if you are not for certain which teacher will have which section, because this can be altered at any time with the Teachers Page which will discussed later *(More information on page ###)*.
   4. Determine the number and teacher, click “Create this section,” and you will then be redirected to that section where you can finally be on your way to adding students.
   5. If you ever need to view another section, click on the “Change Section” dropdown box and select the section number you need. If you want a quick reference to know what section you are viewing, then it will be in a small box in the top right corner (*more information on page ###*).
3. There are two ways to add students: import from an Excel spreadsheet or add a single student at a time (if you are bored and you want to add each student at a time or if you have a student add the class during drop/add).
   1. As a note: You need to have a section selected in order to add any students. If you need to change a section or add a section, see the previous step (Step 2).
   2. For the Excel spreadsheet:
      1. **Very Important Note**: For the Excel spreadsheet import to work, please verify that the order (A-L) of the columns are as follow: Course, ID, Name, Class, Grad Term, Box, Phone, E-mail, Major Minor, Work, RA. If a column is missing, please add the column with the title, but you may leave the actual rows empty.
      2. Open up your spreadsheet.
      3. Select everything. Yes, everything. You do not have to worry about if you selected the headings or anything else. The easiest way to select and copy everything is to just click once in the spreadsheet, press Ctrl. + A (to select all) on your keyboard, and then press Ctrl. + C (to copy) on your keyboard.
      4. Go back to adit.
      5. Make sure you are in the correct section you want and click on the “Add Students” link.
      6. Click on the “Copy and Paste your Excel spreadsheet of students here:” link.
      7. A large text box will popup where you can then paste everything from your spreadsheet into the box by pressing Ctrl. + V (to paste) on your keyboard.
      8. Click “Add Students to Section.”
      9. Viola you just created all of your students for that selected section.
   3. For the single student at a time:
      1. Click on the “Add Students” link.
      2. Fill out the form for the student, and click “Add to Project” to add the student to the selected section.
4. For promoting, demoting, deactivating, or reactivating a student or adding or removing a student(s) to a team or assigning bonus points:
   1. First select student(s), that you want to change, by checking the checkbox next to the student(s).
   2. Find the drop-down box labeled “Choose Action,” select the option you want (explained below from i to vii), and click the “Submit” button that is located to the “Choose Action” drop-down box.
      1. Promote Student – set a student as a student manager.
      2. Demote Student – set a student manager back to a regular student.
      3. Add to Team – set students to a specific student manager. To actually assign a team:
         1. Select all of the students that you want in a team.
         2. After you have checked all of the students, choose the Assign Team option.
         3. Another drop-down box will pop up with a list of all the student managers for the selected section.
         4. Then select the student manager you want.
         5. Keep in mind: to create a team, you will need at least one student manager in the selected section.
      4. Remove from Team – remove a student(s) from a current team.
      5. Assign Bonus Points – give a student bonus points for different reasons which you can set up on the Bonuses tab (see page ###).
      6. Activate Student – join the student back to the project, making the student able to use adit again.
      7. Deactivate Student – remove the student from the project, making the student unable to use adit. However, they will still be tied to the section and can always be activated.
5. To edit a student once they have been entered in a section, simply click on the Edit link for that student.
   1. This will take you to a form that is set up like the “Add Students” form.
   2. Just change any of the information you need to and then click “Update Student.”

***Upkeep***

1. Whenever you come back to this page, you can do any and all the things in the Set Up section of the Students Page.
2. However, one thing that you might often use is the ability to view a particular student’s clients.
   1. To do this, click on the student’s name (first or last, it does not matter).
   2. It will take you to that Student’s Clients page, where you can see or edit his Active and Completed clients as well as see which clients he has Released.
   3. For more information on the Student’s Clients page please go to page ###.

***Teachers***

***Set Up and Upkeep***

1. The Set Up and Upkeep for the Teachers page will be the same.
2. The page is displayed into two tables. The first has all of the current teachers assigned to a section in the project, and the second table has all of the teachers that can use adit.
3. This page is where you will be able to either add a new teacher, edit an existing teacher, add another teacher to a section, change the section a teacher belongs to, or remove a teacher from a section.
4. To add a new teacher:
   1. Click the “Add New Teacher” button to go to a form where you can enter in the basic information for a teacher.
   2. Once you are finished entering all of the information, click “Create Teacher” and that teacher can now use adit!
5. To edit an existing teacher:
   1. Click on the “Edit” link that is on the teacher’s row you want to edit.
   2. You will be directed to a form that is set up like the “Add New Teacher” form in the previous step (step 4).
   3. Change the desired information and click the “Update Teacher” to save the changes.
6. To add another teacher to a section:
   1. Keep in mind: to add another teacher to a section, there needs to be a section and at least one teacher already assigned to it. If there is no section, please go to the Students page to create a section (page ###).
   2. Click on the “Add Another Teacher to this Section” link to have a dropdown option popup.
   3. Choose the desired teacher and click “Add Teacher to Section” to add the teacher to that section.
7. To change the section a teacher belongs to:
   1. Click on the “Change Teacher” link for that section and a dropdown option will popup.
   2. Here you will see what current teacher that is assigned to that section as well as a dropdown of all of the other teachers from the Teacher Roster table.
   3. Choose the desired teacher from the dropdown and click “Change the Teacher” to change the teacher that belongs to that section.
8. To remove a teacher from a section:
   1. Keep in mind: this option will not be available unless there are at least two teachers assigned to a section.
   2. Click on the “Remove” link next to the teacher you want to remove, and a popup will ask you if you are sure you want to remove the teacher from the section.
   3. Click “OK” and the teacher has now been removed from the section.

***Clients Tab***

***Assign***

1. Here is where you will see a list of all of the clients in adit.
2. While viewing the list of clients, there will be two options associated to each one.
   1. One will be a button labeled “Assign,” and the other will be the name of a student and the student’s ID number.
   2. The “Assign” button will be used for assigning a client to a student (main reason for this page), explained in the next step (step 3).
   3. If you assign a client to a student or if a student has chosen a client on their own, then their name and ID will be displayed instead of the “Assign” button.
3. To assign a client to a student:
   1. Find the client you wish to assign from the table.
   2. Click on the “Assign” button and you will be redirected to another page.
   3. This page will be split up into two sections where the left section will have the client’s basic contact information as well as what priority it is (high, medium, or low). The right section will consist of all the students in your currently selected section.
   4. Click on the student (highlighting them) and then click on the “Assign” button, which will assign the client to that student.

***Approve***

1. This is the other page under the Clients Tab and where you will be able to approve or disapprove a newly submitted client, an edited client, and even submit a client yourself.
2. The Approve Clients page is split up into three main sections: Pending Clients, Edited Clients, and Unapproved Clients.
3. Now there are commonalities between the Pending Clients section and the Edited Clients section, one of which is that they will have three options to choose from: Approve, Approve All, or Disapprove.
   1. Approve:
      1. This option will approve the client and allow it to be used in adit from now on, and will be available for anyone to select in the next project.
      2. Approving the client will also automatically assign that new or edited client to the student who submitted it for approval.
   2. Approve All:
      1. This is the previous option (Approve) applied to all of the pending or edited clients, without
      2. As with Approve, the client will be permanently inserted into adit along with the student being assigned the client.
      3. Hint: if the list of pending clients or edited clients is twenty long and one or two clients will not get approved, then you can Disapprove just those one or two client and then select Approve All. That way you don’t have to individually select each client to approve.
   3. Disapprove:
      1. This option will prevent the client from being used in adit and will be placed in the Unapproved Clients section.
4. Another commonality is with the fact that you may edit the pending or edited client yourself.
   1. To do this, select the “Edit” button that is on the same row as the client you wish to edit.
   2. A form will pop up, allowing you to make any changes yourself before approving the client.
   3. Keep in mind that if you make any changes yourself and submit it, you will automatically approve the client as well. So if the client was pending, then it will get assigned to the student who submitted it. The same with the edited client; it will go back to the student who submitted it.
5. Pending Clients:
   1. If there are any newly submitted clients from a student, then they will be on display in this section.
   2. There are three options to choose from for a pending client: Approve, Approve All, or Disapprove (as explained in step 3 above).
   3. To use one of these options, select the checkbox next to each pending client and then click on the option you want.
6. Edited Clients:
   1. If there are any clients that need to be updated or changed, as submitted by a student, then they will show up here.
   2. There are three options to choose from for a pending client: Approve, Approve All, or Disapprove (as explained in step 3 above).
   3. To use one of these options, select the checkbox next to each pending client and then click on the option you want.
7. Unapproved Clients:
   1. All of the unapproved clients that a student cannot use in adit will be on display here.
   2. This section is more of a reference and you will not be able to alter any of this information.

***Reports Tab***

1. The Report pages will be split up into seven separate pages:
   1. Student Summary
   2. Team Summary
   3. Clients
   4. Activities
   5. Sales
   6. Bonus Summary
   7. End of Semester
2. Within all of these pages is the option to change the current section.
   1. To do this, find the dropdown box labeled “Change Section” located in the top right.
   2. Select whichever section from the dropdown choices that you want to see. You may also see all of the sections combined by choosing the “all” option.
3. With every page, excluding the Team Summary, Clients, and End of Semester pages, you will have the option of going to a particular student’s clients.
   1. To do this, click on the student’s name (first or last, it does not matter).
   2. It will then take you to that Student’s Clients page, where you can see or edit his Active or Completed clients, as well as see which clients he has released.
   3. For more information on the Student’s Clients page please go to page ###.

***Student Summary***

1. This page will be used to display an overview summary of each student in a section.
2. The table used for this page will also include information on:
   1. Open Clients – The amount of unsold clients a student currently has.
   2. Sold Clients – The amount of sold clients a student has made.
   3. Released Clients – The amount of clients a student has released or made available for another student to take.
   4. Sales Total – The total amount of money for all of the sold clients a student has earned.
   5. Points – The total amount of points a student has earned so far.
   6. Last Student Action – When the last action a student has made.
3. Then at the very bottom of the table, there will be a totals row that will display the total information for:
   1. Open Clients – The amount of unsold clients the section currently has.
   2. Sold Clients – The amount of sold clients the section has made.
   3. Released Clients – The amount of clients the section has released or made available.
   4. Sales Total – The grand total amount of money the section has earned.
   5. Points – The grand total amount of points the section has made.

***Team Summary***

1. This page will be used to display a general summary of all of the teams, if teams have been set up.
2. It will also just be a reference for you to see how a team is doing with the table showing:
   1. Open Clients – The amount of unsold clients the team currently has.
   2. Sold Clients – The amount of sold clients the team has made.
   3. Released Clients – The amount of clients the team has released or made available.
   4. Sales Total – The grand total amount of money the team has earned.
   5. Points – The grand total amount of points the team has made.

***Clients***

1. This page is the master client list of all the clients in adit (approved and unapproved).
2. The clients will have:
   1. All of their contact information (address, phone, and contact person).
   2. The sold years for either the Arrow or Calendar.
   3. The status of the client (whether approved or unapproved).
   4. Any comment associated with the client.

***Activities***

1. This page will break down the Student Summary page into a little more detail for each student in a section.
2. The table will give more specifics to each student and what action they did by displaying:
   1. Date/Time action was reported – When the last action was recorded by a student.
   2. Client – The client that the student performed the action on.
   3. Action – The action the student used for that client. It will be one of three choices:
      1. First Contact – The student has at least contacted the client.
      2. Presentation – The student has pitched and made a presentation to the client.
      3. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
      4. Old Sale – This is a returning client who has bought recently (a high priority client).
      5. Comment – The student has only submitted a comment about the client.
   4. Points Received – The total amount of points a student has made for that action.
   5. Cumulative Points on Client – The total amount of point a student has earned for that client.
   6. Comments – The comment a student has submitted for that action.
3. At the very bottom of the table, there will also be a totals row that will give information about:
   1. Points Received – The grand total amount of points that all of the students have earned in that section.

***Sales***

1. This page is specifically set to show you what client has been sold so far.
2. The table on this page will give information on:
   1. Date/Time sale was reported – The day and time that a student went and made a sale to a client.
   2. Company – The client that was sold to.
   3. Page Size – The size of ad the client purchased.
   4. Sales – The amount of money received for the client’s ad purchase.
   5. Payment – The type of payment the client used.
   6. Ad/Status – The type of sale that was made:
      1. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
      2. Old Sale – This is a returning client who has bought recently (a high priority client).
3. At the very bottom of the table, there will also be a totals row that will give information about:
   1. Sales – The grand total amount of all the money received for all the client’s ad purchase.

***Bonus Summary***

1. This page will show you all of the students who have received bonus points.
2. The table on this page will include information on:
   1. The student’s information (name, ID, student manager, and section number).
   2. Bonus Name – A description of the bonus.
   3. Points Earned – The amount of points the student has received for that bonus.
3. At the very bottom of the table, there will be a totals row that will have:
   1. Points Earned – The grand total amount of points that all of the students have received.
4. To learn more about setting up bonuses, see the Bonuses tab on page ###.

***End of Semester***

1. This page will show you all the clients that sold for this project and all of the information tied with that client. It is mainly for the end of the semester, but you can access this page anytime throughout the semester.
2. The information on this page will include:
   1. Date – The date and time a client was sold an ad.
   2. Company – The client that was sold to.
   3. Sold Arrow Years – The previous years that a client was sold an ad for the PCA Arrow.
   4. Sold Calendar Years – The previous years that a client was sold an ad for the PCC Calendar.
   5. Page Size – The size of ad the client purchased.
   6. Sales – The amount of money received for the client’s ad purchase.
   7. First Name – The first name of the student who sold to the client.
   8. Last Name – The last name of the student who sold to the client.
   9. Team Leader – The student manager of the student.
   10. Payment – The type of payment the client used.
   11. Ad/Status – The type of sale that was made:
       1. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
       2. Old Sale – This is a returning client who has bought recently (a high priority client).
3. At the very bottom of the table, there will also be a totals row that will give information about:
   1. Sales – The grand total amount of all the money received for all the client’s ad purchase.

***Bonuses Tab***

1. This page will allow you to create, edit, or delete bonus options that can be used on the Students page to assign bonus points.
2. To create a new bonus:
   1. Click on the “New Bonus” link to be directed to a form.
   2. Type in a bonus name (description) for the bonus and the amount of points it is worth.
   3. Then finally click on the “Create Bonus” button to add that bonus to the available options for the Students page.
3. To edit a bonus:
   1. Click on the “Edit” link to be directed to the same form for a new bonus.
   2. Change any information, and then click the “Update Bonus” button to finish.
   3. Editing a bonus will change for the entire adit. So if you assigned a bonus to a student and decide to edit either the point value or name, then it will be changed for that student.
4. To delete a bonus, simply click on the “Delete” link. A box will popup making sure you want to delete it, and clicking OK will delete the bonus.

***Getting to a Student’s Clients page***

1. This option is used on the Students, Student Summary, Activities, Sales, and Bonus Summary pages.
2. To get to this page, simply click on either the student’s first name or last name (it does not matter which one).
3. You will then be taken to the Student’s Clients page where it will be set up as followed:
   1. At the top of the page will be the student’s first name to help identify whose clients you are viewing (just in case you meant to click John and accidentally sneezed while clicking and ended up clicking Jane’s name instead).
   2. There will also be a “Back” button to take you back to the previous page you were at (Students, Student Summary, Activities, or Sales pages).
   3. The main page will be split up between three sections: Active Clients, Completed Clients, and Released Clients. These three sections will be discussed in further detail in the following Miscellaneous Notes sections.
4. To return back to the page you came from (either Manage Students or any of the Reports Page), simply click the “Back to” button in the top left corner.

***Active Clients Section of a Student’s Clients page***

1. This section will show you information about a student’s current and active clients that he is working on.
2. If the student has any active clients, then they will be displayed in their own box.
3. Each of these boxes will be colored in either:
   1. Green – This color is used to show that the client is considered a high priority client (the client has been sold an ad within the past year).
   2. Yellow – This color is used to show that the client is considered a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White – This color is used to show that the client is considered a low priority client (the client has either not been sold an ad, a newly approved client, or has not been sold an ad in a very long time).
4. Each box will give the client’s business name and what the student has done with the client:
   1. At the top will be the client’s business name, and you can click anywhere in the box to be taken to the Client’s page.
   2. A “To Do:” list to show what the student has left with the client.
      1. First Contact – The student has at least made contact with the client and has recorded it with adit. It will either have a checkmark or not to distinguish.
      2. Presentation – The student has made a presentation to the client and has recorded it with adit. It will either have a checkmark or not to distinguish.
      3. Sale – The student has made a sale to the client and has recorded it with adit. It will either have a checkmark or not to distinguish.
   3. Points – The amount of points the student has earned with this client.
5. Also, each box will have a small “x” in the top left corner will be a small “x” (you will have to hover the mouse over the box to see it).
   1. This “x” will release the client so it can be chosen from another student.
   2. To release a client:
      1. If the student either attempted to make a sale and couldn’t or the client refused to buy an ad, then there is the option to release the client back to the Client List tab.
      2. Click on the small “x” in the top left corner to make a popup box appear.
         1. If you accidentally clicked the “x” and you don’t really want to release the client, then you can click the “Cancel” button.
      3. This popup box will ask you to leave a comment (optional) as to why you are releasing the client.
      4. Type in a comment if you want to and then click the button labeled “Release,” and that’s it.
      5. The client will now be removed from the student’s Active Clients section and placed in the student’s Released Clients section (explained under *Released Clients Section*).

***Completed Clients Section of a Student’s Clients Page***

1. This section will show you information about a student’s completed or sold clients that he has finished.
2. If the student has any completed clients, then they will be displayed in their own small box.
3. Each of these boxes will be colored in either:
   1. Green – This color is used to show that the client is considered a high priority client (the client has been sold an ad within the past year).
   2. Yellow – This color is used to show that the client is considered a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White – This color is used to show that the client is considered a low priority client (the client has either not been sold an ad, a newly approved client, or has not been sold an ad in a very long time).
4. Each box will give the client’s business name and how many points the student has earned with the client:
   1. At the top will be the client’s business name, and you can click anywhere in the box to be taken to the Client’s page.
   2. Points – The amount of points the student has earned with this client.

***Released Clients Section of a Student’s Clients Page***

1. This section will show you information about a student’s released clients that he has sent back so another student can try and sell an ad to the client.
2. If the student has any released clients, then they will be displayed in their own small box.
3. All of these boxes will be colored grey to show that they have been released.
4. Each box will give the client’s business name and how many points the student has earned with the client:
   1. At the top will be the client’s business name, and you can click anywhere in the box to be taken to the Client’s page.
   2. Points – The amount of points the student has earned with this client.

***Accessing a Client’s Page***

1. This page will show you all the information about the client, as well as the sale progress the student has done to this client.
2. The page will be split into three main sections:
   1. Client information - This section will give you all the necessary information about a client for a student to go and make a contact, presentation, or sale. You may also edit the client’s information.
   2. Sale Progress – This will allow the student to record an action to the student’s sale progress.
   3. Accomplished Section– This section will let you see all of the actions that the student has done with the client.
3. All three types of clients (Active, Completed, and Released) will be able to access the Client’s page, with some types of clients not having access to certain sections.
   1. Active Clients – Full access to anything on the Client’s page.
   2. Completed Clients – Full access to anything on the Client’s page.
   3. Released Clients – Access to Client Information and Accomplished Section on the Client’s page.

***Client Information***

1. This section of the Client’s Page will let you view or edit the client’s information.
2. The client’s basic information (address, contact person, and phone number) will always be on display, but for a more detailed version of the client’s information, then you can click on the “Show client details” link.
3. To edit a client’s information:
   1. Click on the link labeled “Edit this client.”
   2. The form will already be filled out with the current information, but you will be able to edit any field that needs to be edited.
   3. Once you have edited the client’s business information, you may click the button labeled “Update Client.”
4. Keep in mind: Since you have the ability to approve a client, then when you edit the client’s information, it will be automatically updated.

***Sale Progress***

1. This section of the Client’s Page will let you update the student’s Sale Progress.
2. Keep in mind: Only Active or Completed Clients will be able to make changes to the Sale Progress.
3. The student’s Sale Progress will be in the order of:
   1. First Contact
   2. Presentation
   3. Sale
4. To record a First Contact:
   1. Check the checkbox next to “I contact my client!”
   2. Add a comment if you want to add one.
   3. Underneath the comment will be an area to put in the time when the student made a First Contact.
   4. Finally, select the button labeled “Save” to record the action.
5. To record a Presentation:
   1. Check the checkbox next to “I made a presentation!”
   2. Add a comment if you want to add one.
   3. Underneath the comment will be an area to put in the time when the student made a Presentation.
   4. Finally, select the button labeled “Save” to record the action.
6. To record a Sale:
   1. Check the checkbox next to “I made a sale!”
   2. You will need to record the necessary information with a sale:
      1. Sale Amount – The amount of money the client paid for the ad.
      2. Page Size – The page size that the client has bought, and it will either be Planner, Quarter, Half, Whole, Double, or Other page.
         1. The Other page option will allow you to enter a custom page size if it is not currently an option. Also, it can only be a fraction or decimal number.
      3. Payment Type – This is the type of payment option the client used, and will either be Cash, Credit, Invoice, Check, or Departmental Transaction.
   3. Add a comment if you want to add one.
   4. Underneath the comment will be an area to put in the time when the student made a Sale.
   5. Finally, select the button labeled “Save” to record the action.
7. You will also have the ability to record multiple actions at the same time.
   1. This can be done if the student has made a First Contact and Presentation at the same time, or if the student has done all three options at the same time.
   2. Keep in mind: The order of activities will still apply here, in which the student has to make at first a First Contact, then a Presentation, and then finally a Sale.
   3. How this will work (it can be explained better with an example):
      1. The student has made a clean sweep where he has made a First Contact, Presentation, and Sale all at one time, and needs to record it in adit.
      2. When you check the “I contacted my client!” checkbox, the “I made a presentation!” checkbox will pop up.
      3. Select this option to add the action Presentation with First Contact.
      4. Now another checkbox will pop up with the label “I made a sale!”
      5. Select this option to add the action Sale along with Presentation and First Contact.
      6. The necessary sale information will also need to be recorded.
      7. Add a comment, if you want to add one, to be used for all three.
      8. Enter in the date and time to be used for all three.
      9. Then finally click on the button labeled “Save” to record all three actions.
   4. Now this can also be applied in other variations:
      1. Add just Presentation to First Contact.
      2. Add just Sale to Presentation.
   5. If you accidentally select an option that a student has not yet performed, simply unselect it to not record it.
8. To record just a comment:
   1. Just type your comment into the Comment box and click the “Save” button.

***Accomplished Section***

1. This will be consisted of a table of all the accomplished actions that a student has recorded.
2. Keep in mind: Any type of client (Active, Completed, or Released) may view this information.
3. The table will be split up into four main columns:
   1. Action – The type of action the student has recorded. It will either be:
      1. Comment – The student only recorded a comment with the client.
      2. First Contact – The student recorded a first contact with the client.
      3. Presentation – The student recorded a presentation with the client.
      4. New/Old Sale – The student recorded a sale with the client.
   2. Time – The recorded date and time when the student performed the action.
   3. Points – The amount of points the student earned for that action.
   4. Comment – The comment with the action if the student recorded one.
4. At the very end of a row will have the ability to delete the action.
   1. This is where the order in which a student can record an action will come into play again (First Contact followed by Presentation and Sale at the end).
   2. However, you will be deleting in reverse order (you will need to delete Sale before Presentation, and delete Presentation before First Contact).
   3. A Comment by itself can be deleted at any time.
   4. When you click on the “Delete” link, a box will pop up asking “Are you sure?”
   5. Select “Yes” to delete the action.
   6. Important: If you are on a Completed Client and decide to delete the Sale action, then the client will then become an Active Client again for that student.

***Miscellaneous Notes***

1. With adit, there are some areas that overlap or use the same features throughout all of the different pages.
2. Therefore, this section is to go over in more detail of previously mentioned topics of the Teacher User Manual.

***Navigation***

1. Throughout adit, there will be navigational buttons as well as a permanent navigation bar at the top of every page (except the Sign In page).
2. The navigation bar will be used for when you want to go to the main pages throughout adit.
3. If you click on a link within one of these main pages, you will have the option to always go back to the previous page. They will all begin with the words “Back to.”
4. We highly recommend using the navigation bar and “Back to” buttons to navigate between pages, but you can still of course use the back buttons provided through the Internet browser.

***Information Box***

1. On every single page will be a box in the top right corner.
2. This box will give the following information:
   1. Project – The current project that you are using or viewing. It is usually the active project that you will be on and will tell the Semester and Year. To change the project, go to the Projects page explained on page ###.
   2. (Current) Section – This will let you know what section you are currently on for viewing. To change the section, go to the Students page under the Sections tab explained on page ###.
   3. Current User – This should be you ☺ It will tell you who is logged in on adit by displaying last name.

***How to Use a Table***

1. Every table is generally set up the same way throughout all of adit.
2. The similar features for every table include:
   1. Search Bar:
      1. This is located in the top right corner of a table and is used to search for anything in the entire table.
      2. Just start typing into the text box, and it will automatically display anything that matches what you type.
      3. If nothing matches, a notice saying “No matching records found” will display.
   2. Sortable Columns:
      1. The default sorting on every table is the first column is sorted in alphabetical or numerical order.
      2. Almost every column in a table will have the option to sort what order you want.
      3. You can sort in either alphabetical or numerical order.
      4. The easiest way to determine if the column will sort or not is to see if the column has a double triangle symbol. The columns that do have this symbol will have the option to sort.
      5. Also, if there is only the top triangle on the column, then the table is currently sorted on that column with the first alphabet letter or number at the top of the table. While on the other hand, if there is only the bottom triangle on the column, then the table is currently sorted on that column with the last alphabet letter or number at the top of the table.
   3. Scroll Bar:
      1. Located at the bottom of the table, this will allow you to scroll across the table and view the columns on the far right.
      2. Hint: Any easy and quick way to scroll horizontally is by clicking anywhere in the table, and then using the directional arrows to move left and right.
   4. Information Corner:
      1. This is located at the bottom left corner of a table and is used to display how many entries (rows) there are in the table.
3. As with anything with adit, play around and test it out to get a feel of how a table works.