AE Record Tracking App
Team Avengers - CPSC 319
User Documentation

Created On: November 29, 2017

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Getting Started

AE Record Tracking is a browser-based app used for record management. You must be given authorization to use this app. Unauthorized users will see this message upon app startup:

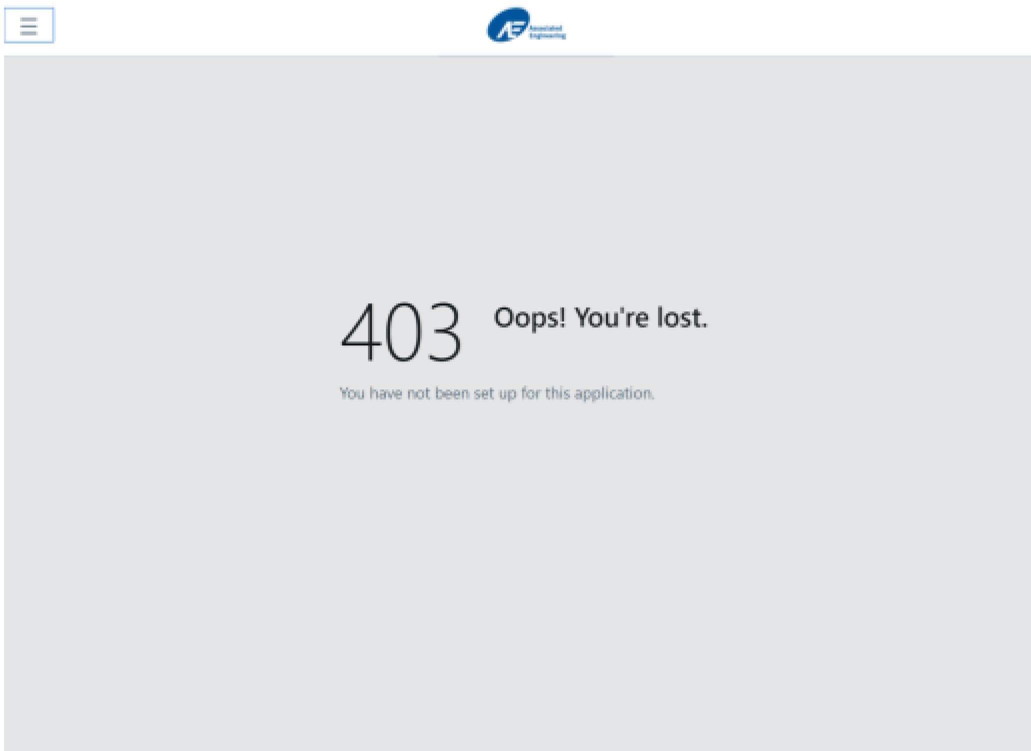

Figure 1: 403 Forbidden screen shown when unauthorized users open the app.

Users who are granted permission to use this app are divided into 3 roles: Regular User, Record Management Coordinators, and Administrators. Please see below for more information user permissions.

Jump Start Guide for Regular Users

Regular Users have access to search features listed in the Searching Data section.

Jump Start Guide for Record Management Coordinators

Record Management Coordinators (RMCs) have access to Regular User, as well as the ability to print reports.

Jump Start Guide for Administrators

Administrators have access to Regular User features, as well as create, update, and destroy permissions for all locations.

Searching

Quick Search

Quick search is a fast way for you to search by Record Number, Box Number, and Consignment Code. You must enter a complete Record Number, Box Number, or Consignment Code. It will not return results for partial search inputs.

The result table column widths are manually adjustable. If you get several pages of results, you may scroll to the bottom of the screen to change pages and adjust the number of rows shown per page.

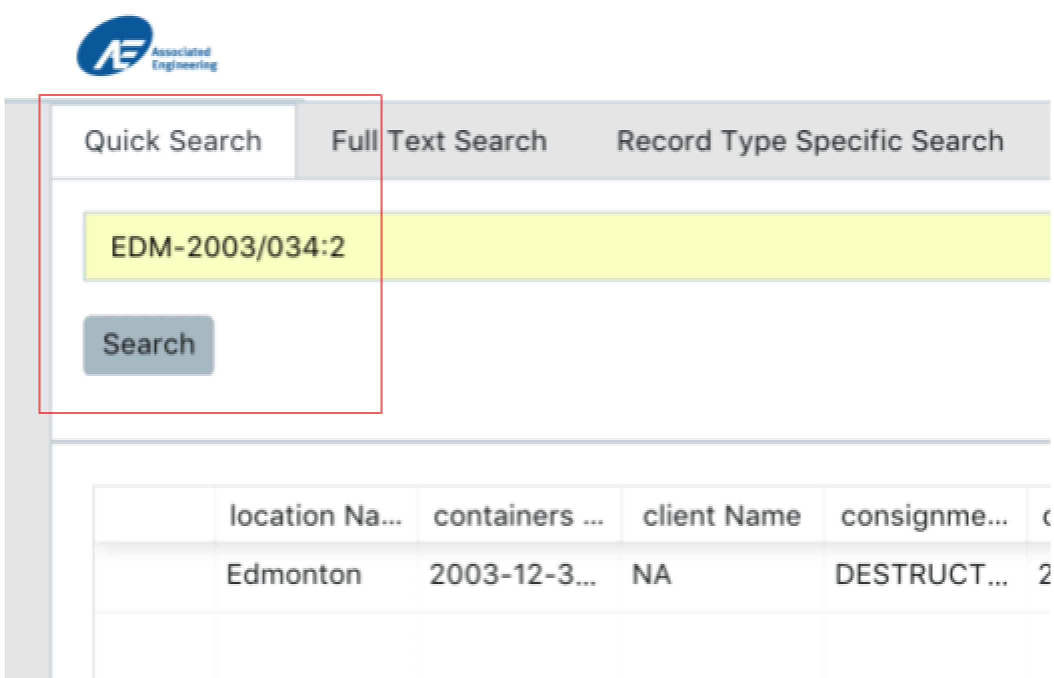

Figure 2: The Quick Search tab.

Steps (see Figure 2):

1. To do a Quick Search, click the **Quick Search** tab.
2. Type a complete Record Number, Box Number, or Consignment Code in the search box.
3. Click **Search**.

Full Text Search

Full Text Search provides a more comprehensive search combined with filtering options.

You can search by Record Number, Box Number, Record Title, Box Title, Record Notes, Box Notes, and Consignment Code. Partial search inputs are allowed.

You can filter by Record Type, Location, Classification, Dates, Record State, and Retention Schedules.

The result table column widths are manually adjustable. If you get several pages of results, you may scroll to the bottom of the screen to change pages and adjust the number of rows shown per page.

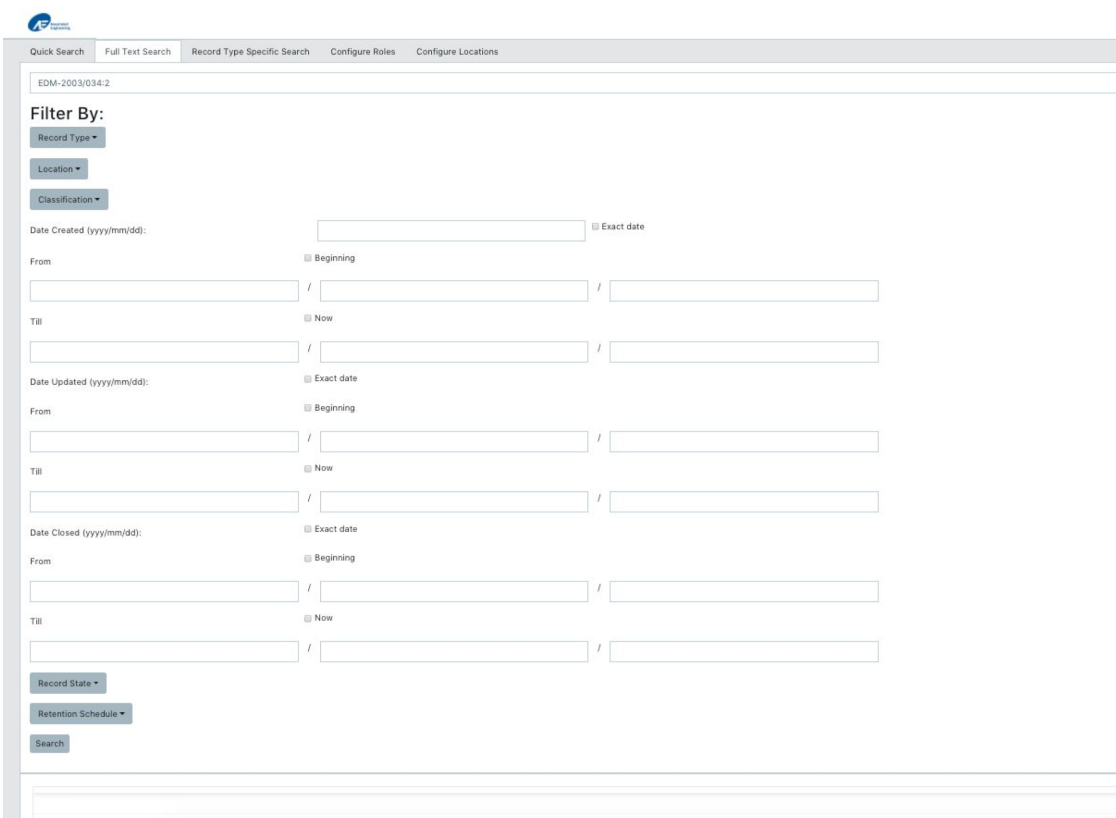

Figure 3: The Full Text Search tab.

Steps (see Figure 3):

1. To do a Full Text Search, click the **Full Text Search** tab.
2. Type a partial or complete Record Number, Box Number, Record Title, Box Title, Record Notes, Box Notes, or Consignment Code in the search box.
3. Select the categories you would like to filter your results by.
4. Click **Search**.

Record Type Specific Search

Record Type Specific Search provides you with the ability to search and filter Projects and Proposals.

You can search by Record Number, Box Number, Record Title, Box Title, Record Notes, or Consignment Code. Partial search inputs are accepted.

The result table column widths are manually adjustable. If you get several pages of results, you may scroll to the bottom of the screen to change pages and adjust the number of rows shown per page.

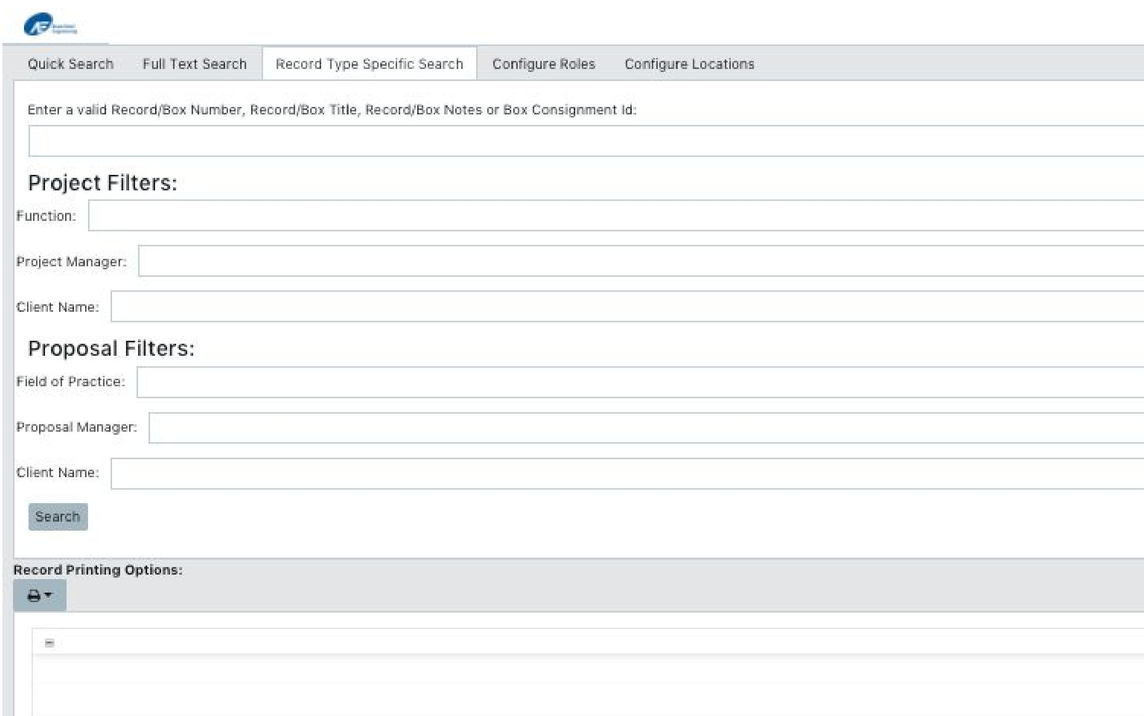

Figure 4: The Record Type Specific Search tab.

Steps

1. To do a Record Type Specific Search, click on the **Record Type Specific Search** tab.
2. Enter a partial or complete Record Number, Box Number, Record Title, Box Title, Record Notes, or Consignment Code in the search box.
3. To filter Projects, enter a partial or complete Function, Project Manager, and/or Client Name.
4. To filter Proposals, enter a partial or complete Field of Practice, Proposal Manager, and/or Client Name.
5. Click **Search**.

Printing

RMCs have the ability to print reports. Three types of reports are available for printing: Record Label, End Tab Label, and Container Reports.

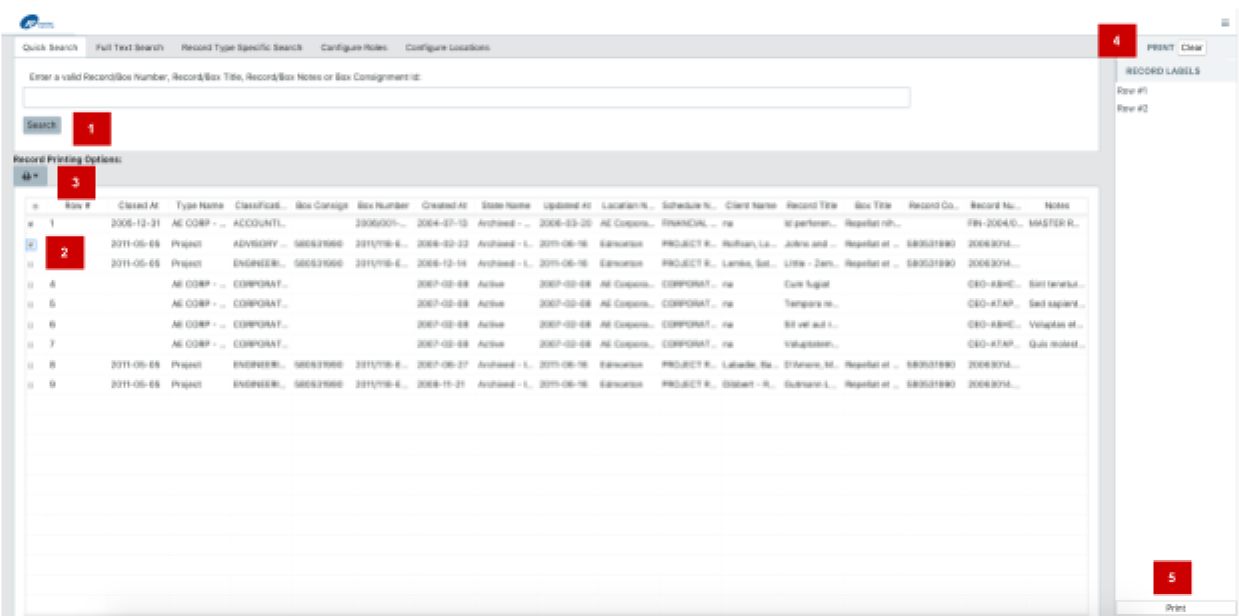

Figure 4: The steps to print a report.

Printing Container Reports

Steps (Figure 4 for illustration)

1. Go to one of the search tabs. Enter a search query in the search box and then click **Search**.

2. Select the record labels you would like to print from the result table by click on their corresponding checkboxes.
3. Click the **Printer** drop down under **Record Printing Options**. Select **Container Reports**.
4. Expand the navigation bar on the top right corner if it has not been expanded already.
5. Click **Print**.

Printing Record Labels

Steps (Figure 4 for illustration)

1. Go to one of the search tabs. Enter a search query in the search box and then click **Search**.
2. Select the record labels you would like to print from the result table by click on their corresponding checkboxes.
3. Click the **Printer** drop down under **Record Printing Options**. Select **Record Labels**.
4. Expand the navigation bar on the top right corner if it has not been expanded already.
5. Click **Print**.

Printing End Tab Labels

Steps (Figure 4 for illustration)

6. Go to one of the search tabs. Enter a search query in the search box and then click **Search**.
7. Select the record labels you would like to print from the result table by click on their corresponding checkboxes.
8. Click the **Printer** drop down under **Record Printing Options**. Select **End Tab Labels**.
9. Expand the navigation bar on the top right corner if it has not been expanded already.
10. Click **Print**.

Configure Roles

The Configure Roles tab provides Administrators with the ability to add, update, and delete roles.

Add New Role

Administrators can add new roles to the system. Results are shown in the the results table at the bottom of the screen.

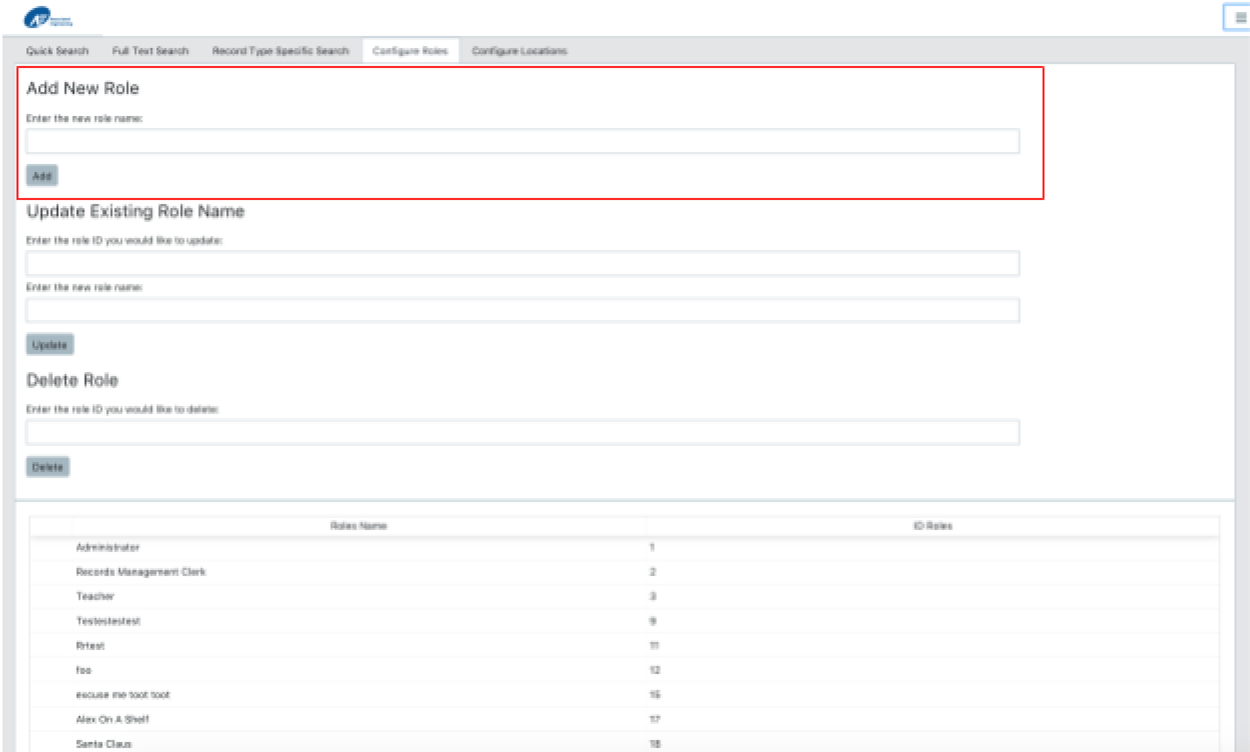

Figure 5: The Configure Roles tab with the Add New Roles section highlighted.

Steps (see Figure 5):

1. Click on the **Configure Roles** tab.
2. Go to the **Add New Roles** section of the page.
3. Enter a role name in the text box.
4. Click **Add**.

Update Existing Role Name

Administrators can update existing roles in the system. Results are shown in the the results table at the bottom of the screen.

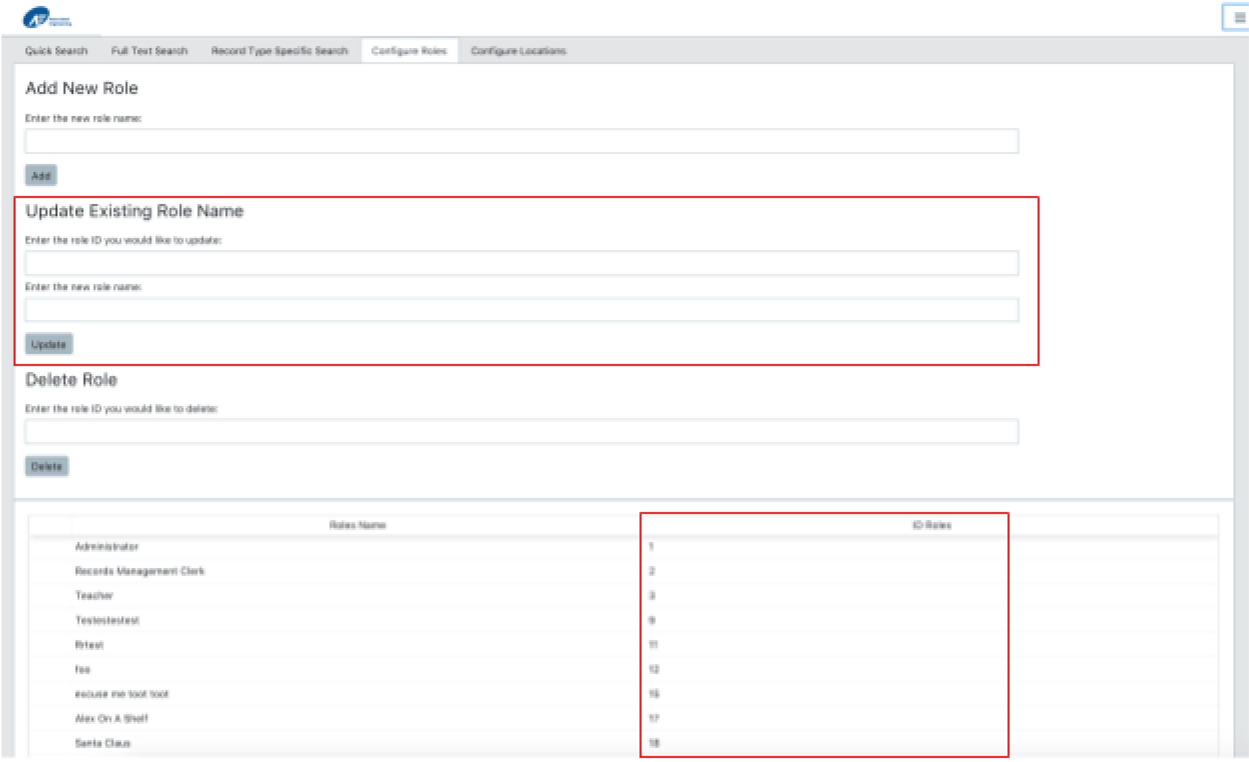

Figure 6: The Configure Roles tab with the Update Existing Role Name and Role ID sections highlighted.

Steps (see Figure 6):

1. Click on the **Configure Roles** tab.
2. Go to the **Update Existing Role Name** section of the page.
3. Enter the ID of the role you would like to update in the first text box. Role IDs are found in the table at the bottom of the page.
4. Enter the new role name in the second text box.
5. Click **Update**.

Delete Role

Administrators can delete roles from the system. Results are shown in the the results table at the bottom of the screen.

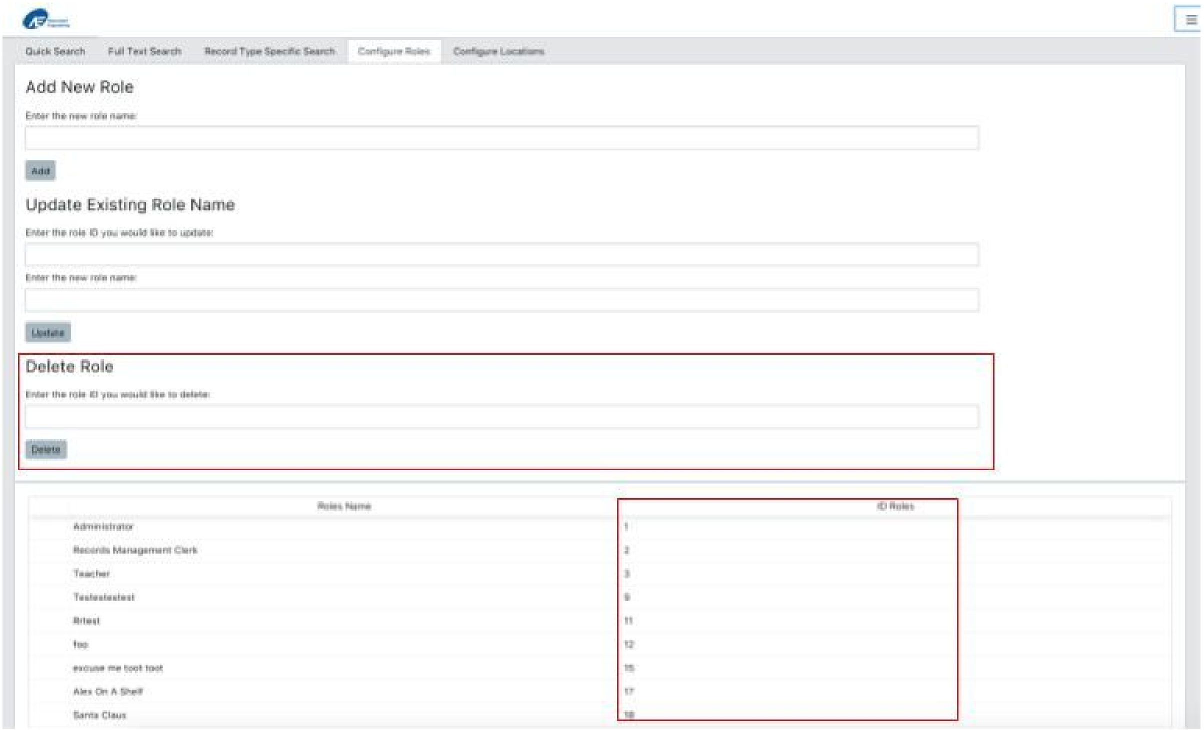

Figure 7: The Configure Roles tab with the Delete Role and Role ID sections highlighted.

Steps (see Figure 7):

1. Click on the **Configure Roles** tab.
2. Go to the **Delete Role** section of the page.
3. Enter the ID of the role you would like to delete. Role IDs are found in the table at the bottom of the page.

Configure Locations

The Configure Locations tab provides Administrators with the ability to add, update, and delete locations.

Add New Location

Administrators add new locations to the system. Results are shown in the the results table at the bottom of the screen.

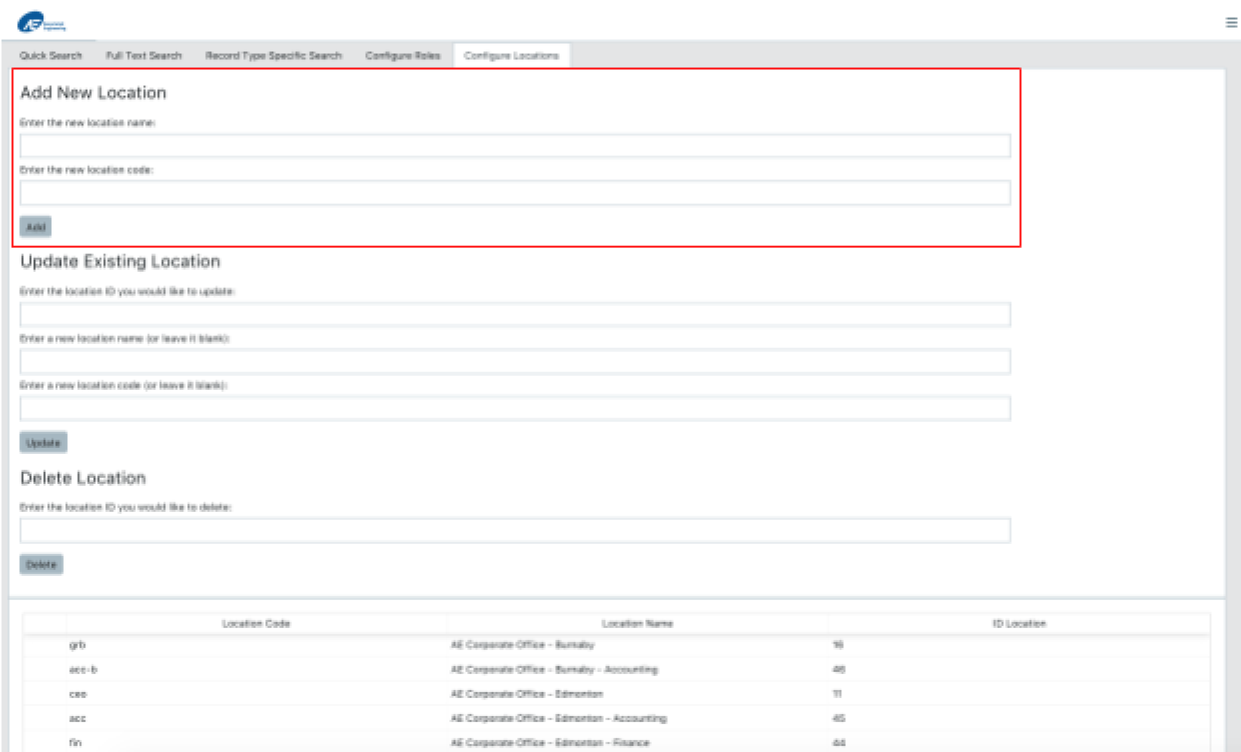

Figure: The Configure Locations tab with the Add New Location section highlighted.

Steps

1. Click on the **Configure Locations** tab.
2. Go to the **Add New Locations** section of the page.
3. Enter a location name in the first text box.
4. Enter a corresponding location code in the second text box.
5. Click **Add**.

Update Existing Location

Administrators can update existing locations in the system. Results are shown in the the results table at the bottom of the screen.

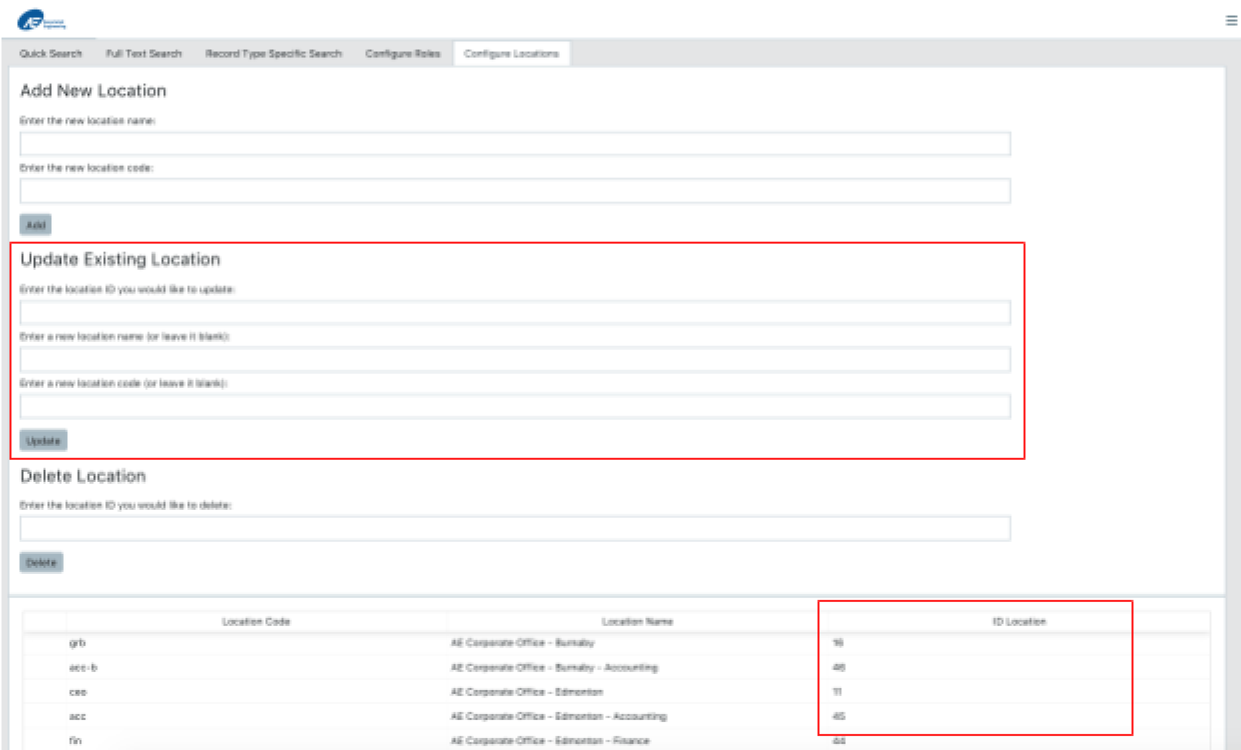

Figure: The Configure Locations tab with the Update Existing Location and Location ID sections highlighted.

Steps

1. Click on the **Configure Locations** tab.
2. Go to the **Update Existing Location** section of the page.
3. Enter the ID of the location you would like to update in the first text box. Location IDs are found in the table at the bottom of the page.
4. Enter a new location name in the second text box, or leave it blank if you don't wish to update the location name.
5. Enter a new location code in the third text box, or leave it blank if you don't wish to update the location name.
6. Click **Update**.

Delete Location

Administrators can delete existing locations in the system. Results are shown in the the results table at the bottom of the screen.

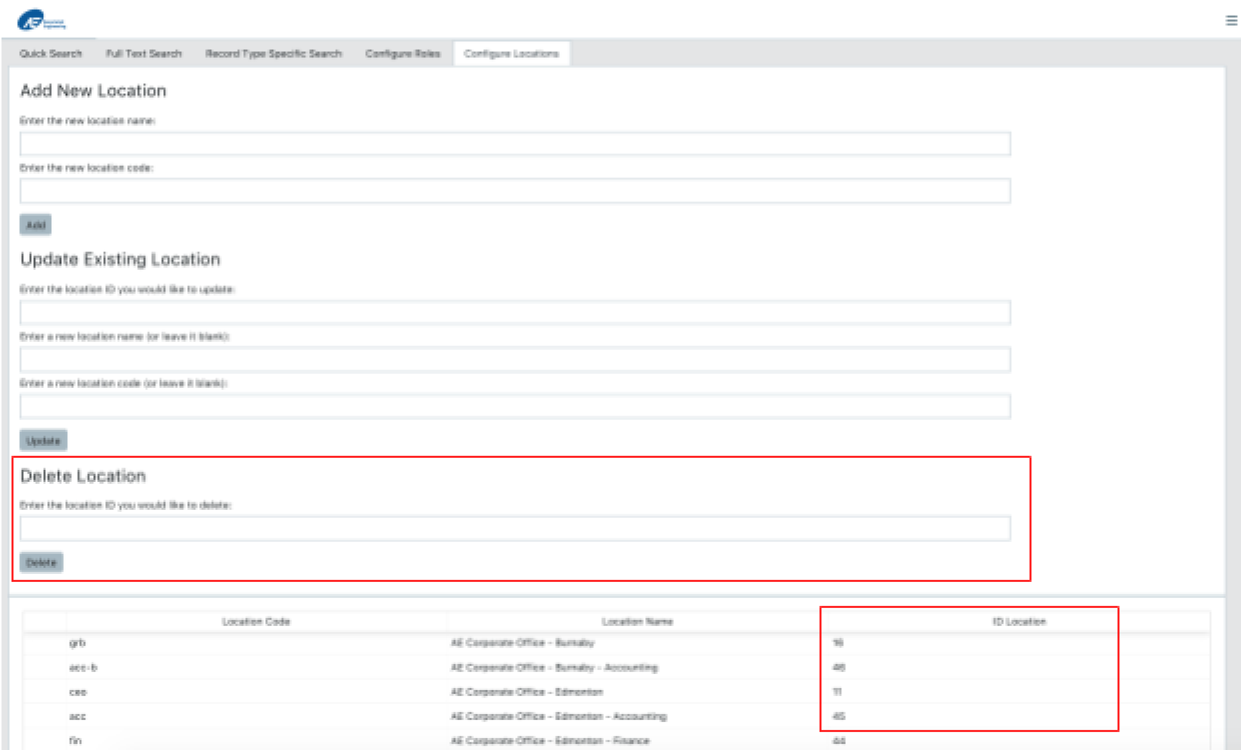

Figure: The Configure Locations tab with the Delete Location and Location ID sections highlighted.

Steps

1. Click on the **Configure Locations** tab.
2. Go to the **Delete Location** section of the page.
3. Enter the ID of the role you would like to delete. Location IDs are found in the table at the bottom of the page.