

AE Record Tracking App

Team Avengers - CPSC 319

User Documentation

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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:

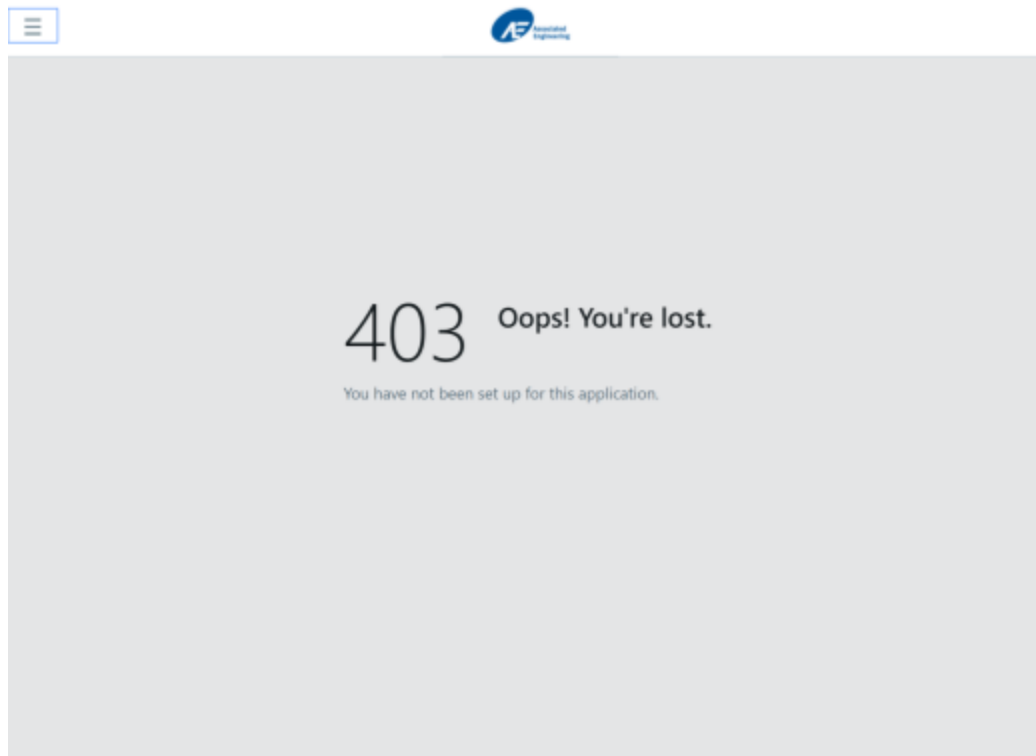


Figure 1: 403 Forbidden screen shown when unauthorized users open the app.

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

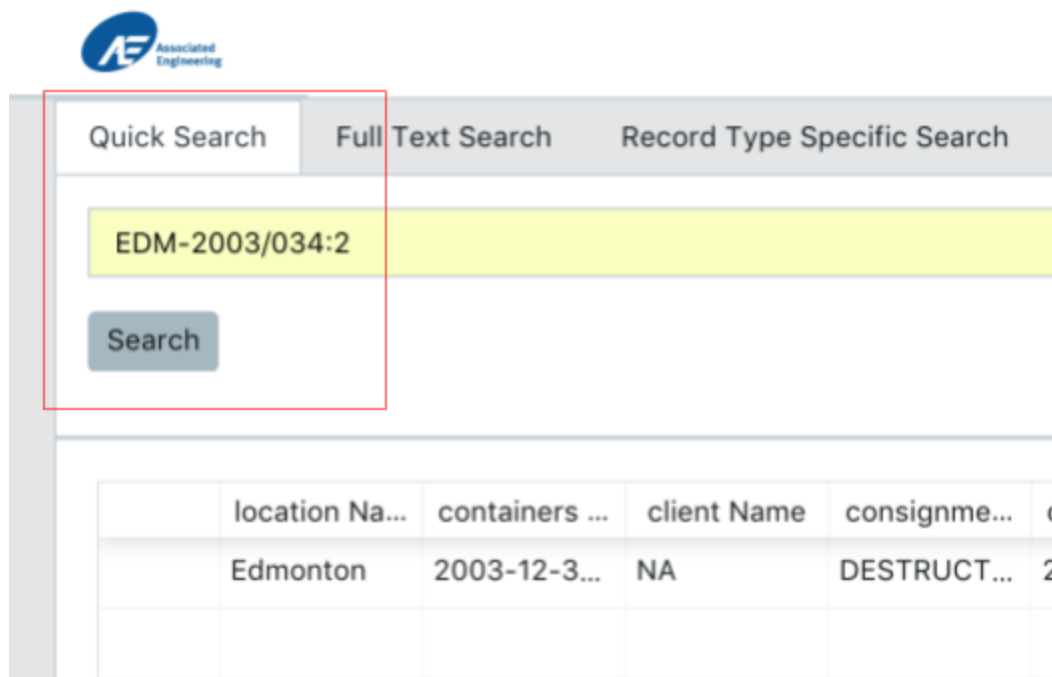
Administrators have access to Regular User features, as well as create, update, and destroy permissions for all locations.

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.



Associated Engineering

Quick Search Full Text Search Record Type Specific Search

EDM-2003/034:2

Search

	location Na...	containers ...	client Name	consignme...	c
	Edmonton	2003-12-3...	NA	DESTRUCT...	2

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.

The screenshot shows the 'Full Text Search' tab selected in a navigation bar. Below the navigation bar is a search input field containing 'EDM-2003/034:2'. To the left of the search area is a 'Filter By:' section with several dropdown menus: 'Record Type', 'Location', 'Classification', 'Record State', and 'Retention Schedule'. Below these are three date filter sections: 'Date Created (yyyy/mm/dd)', 'Date Updated (yyyy/mm/dd)', and 'Date Closed (yyyy/mm/dd)'. Each date section has 'From' and 'To' fields, a 'Till' field, and radio buttons for 'Exact date', 'Beginning', and 'Now'. At the bottom of the filter section is a 'Search' button. The main content area below the filters is empty, showing only the top of a table structure.

Figure 3: The Full Text Search tab.

Steps (see Figure 3):

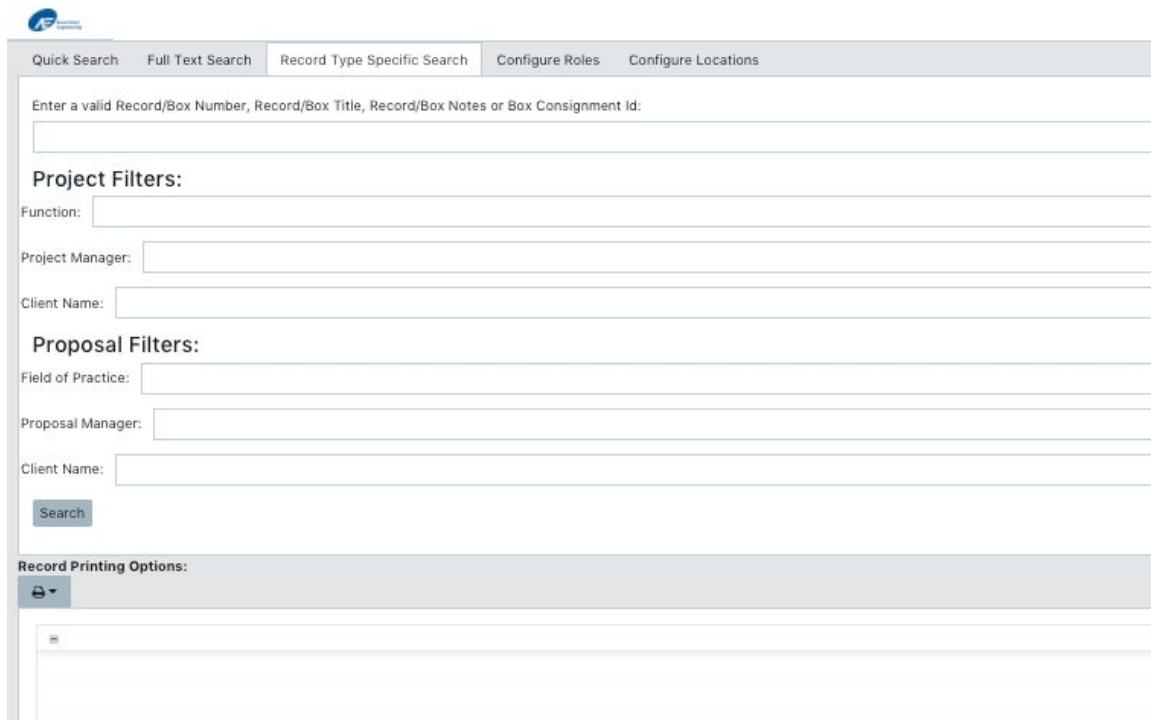
1. To do a Full Text Search, click the **Full Text Search** tab.
2. Type a partial or complete Record Number, Box Number, Record Title, Box Title, Record Notes, Box Notes, or Consignment Code in the search box.
3. Select the categories you would like to filter your results by.
4. Click **Search**.

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.



The screenshot displays the 'Record Type Specific Search' tab within a web application. At the top, a navigation bar includes tabs for 'Quick Search', 'Full Text Search', 'Record Type Specific Search' (which is active), 'Configure Roles', and 'Configure Locations'. Below the navigation bar, a text input field is labeled 'Enter a valid Record/Box Number, Record/Box Title, Record/Box Notes or Box Consignment Id:'. Underneath this, there are two sections of filters: 'Project Filters' and 'Proposal Filters'. The 'Project Filters' section includes input fields for 'Function:', 'Project Manager:', and 'Client Name:'. The 'Proposal Filters' section includes input fields for 'Field of Practice:', 'Proposal Manager:', and 'Client Name:'. A 'Search' button is located below the 'Proposal Filters' section. At the bottom of the form, there is a 'Record Printing Options:' section with a dropdown menu showing a printer icon. The bottom of the page shows a table with columns and rows, indicating search results.

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.

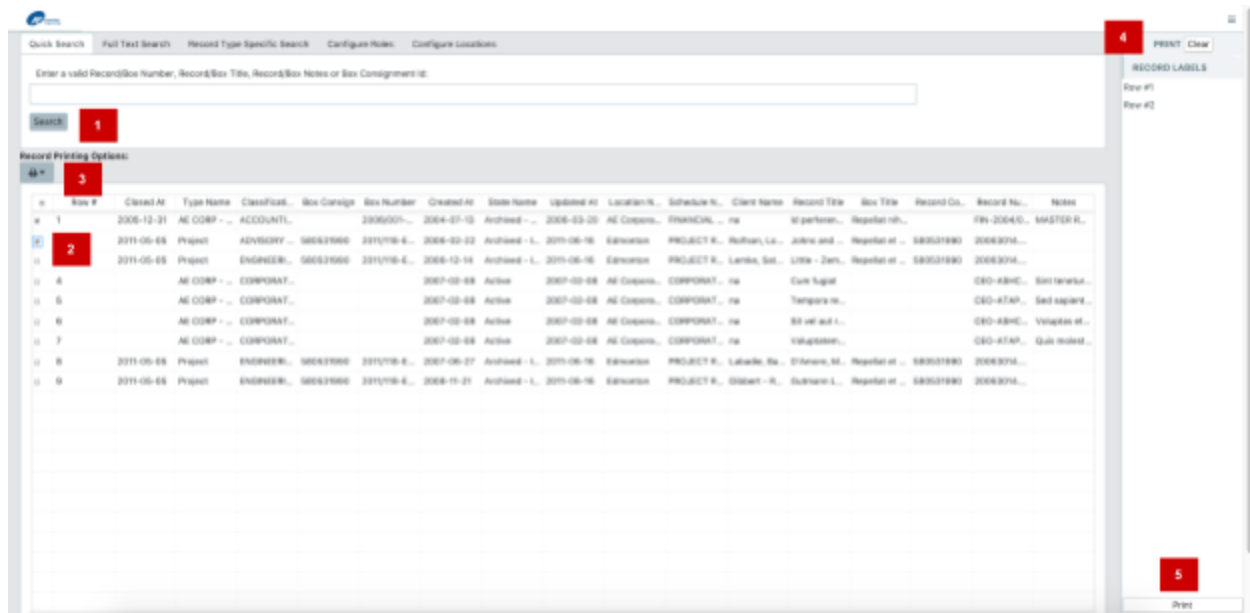


Figure 4: The steps to print a report.

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)

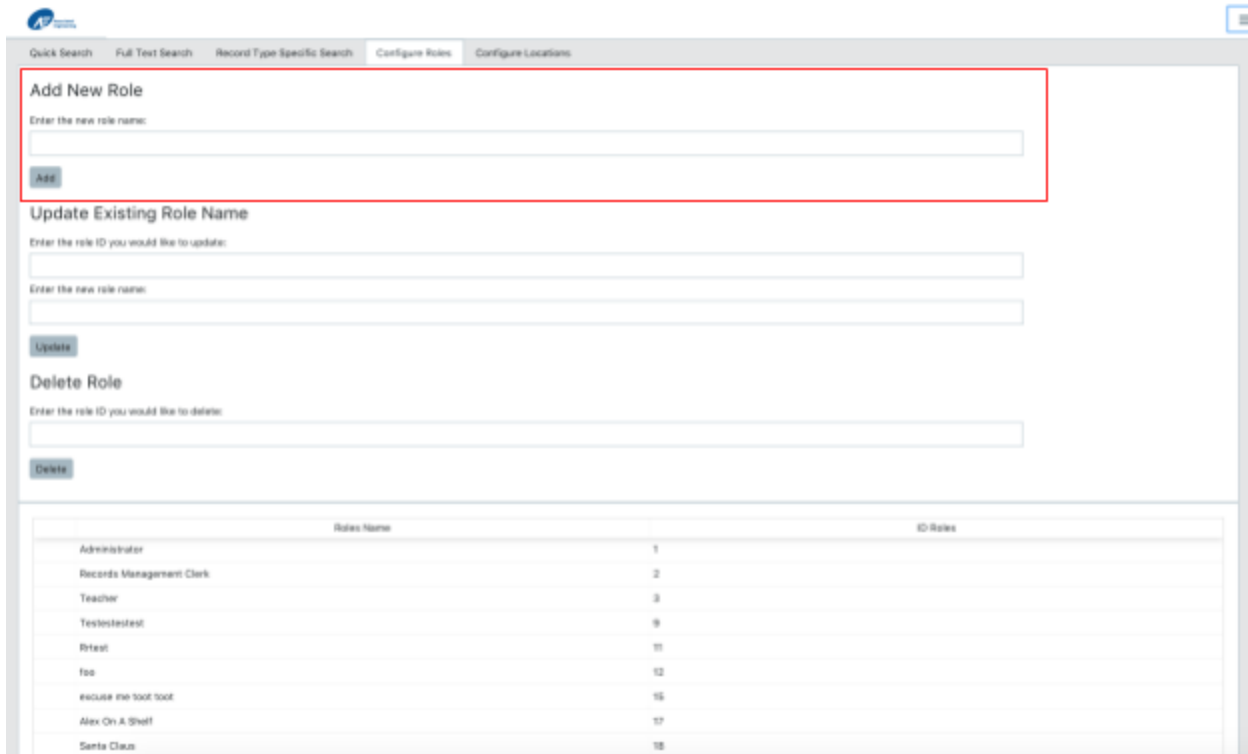
6. Go to one of the search tabs. Enter a search query in the search box and then click **Search**.
7. Select the record labels you would like to print from the result table by click on their corresponding checkboxes.
8. Click the **Printer** drop down under **Record Printing Options**. Select **End Tab 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.



The screenshot shows the 'Configure Roles' tab in a system interface. The 'Add New Role' section is highlighted with a red box. Below it are sections for 'Update Existing Role Name' and 'Delete Role'. At the bottom is a table listing existing roles.

Roles Name	ID-Roles
Administrator	1
Records Management Clerk	2
Teacher	3
Testtesttest	9
Rttest	11
Foo	12
excuuse me tooo tooo	16
Alex On A Shelf	17
Santa Claus	18

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.

Add New Role

Enter the new role name:

Add

Update Existing Role Name

Enter the role ID you would like to update:

Enter the new role name:

Update

Delete Role

Enter the role ID you would like to delete:

Delete

Roles Name	ID Roles
Administrator	1
Records Management Clerk	2
Teacher	3
Testtesttest	4
Student	11
Fee	12
enroute the tool tool	16
Alex On A Shelf	17
Santa Claus	18

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.

Add New Role
Enter the new role name:

Add

Update Existing Role Name
Enter the role ID you would like to update:

Enter the new role name:

Update

Delete Role
Enter the role ID you would like to delete:

Delete

Roles Name	ID Roles
Administrator	1
Records Management Clerk	2
Teacher	3
Testtesttest	4
Altest	11
foo	12
excuse me fool fool	15
Alex On A Shelf	17
Santa Claus	18

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

Steps (see Figure 7):

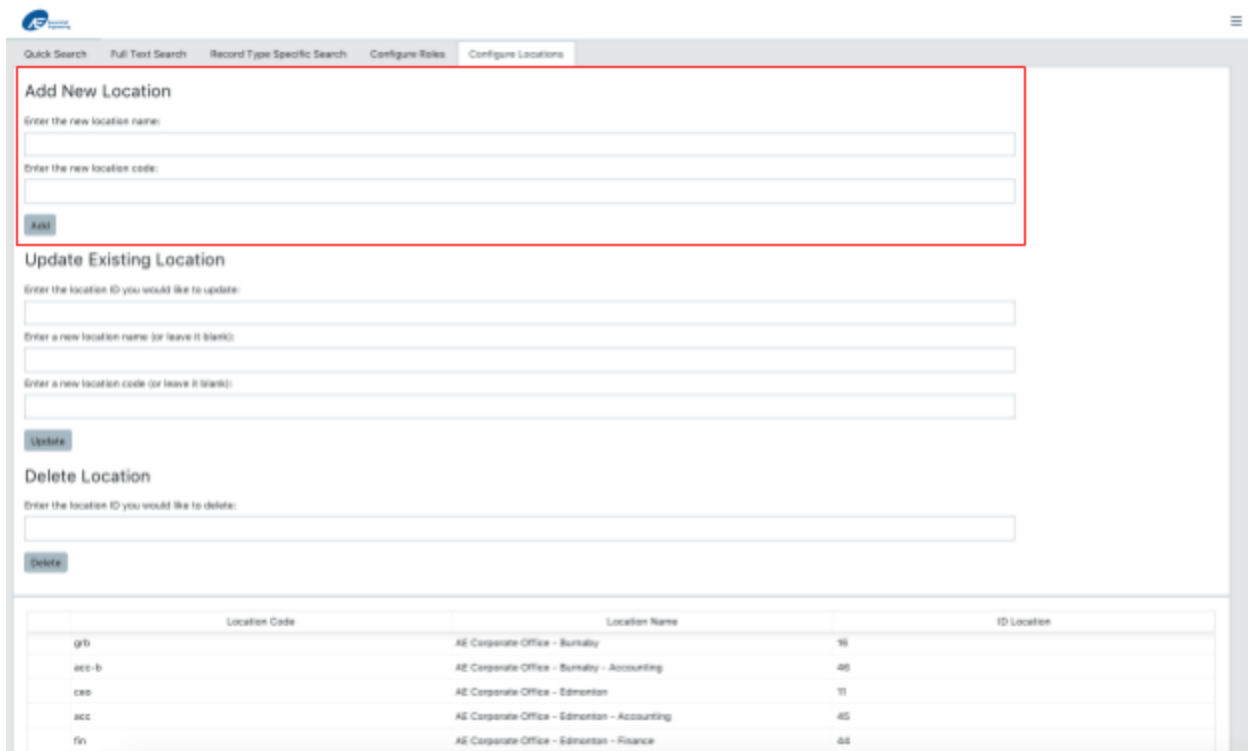
1. Click on the **Configure Roles** tab.
2. Go to the **Delete Role** section of the page.
3. Enter the ID of the role you would like to delete. Role IDs are found in the table at the bottom of the page.

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.



The screenshot shows the 'Configure Locations' tab with three main sections: 'Add New Location', 'Update Existing Location', and 'Delete Location'. The 'Add New Location' section is highlighted with a red box and contains two text input fields for 'Enter the new location name:' and 'Enter the new location code:', followed by an 'Add' button. The 'Update Existing Location' section has three text input fields for 'Enter the location ID you would like to update:', 'Enter a new location name (or leave it blank):', and 'Enter a new location code (or leave it blank):', followed by an 'Update' button. The 'Delete Location' section has one text input field for 'Enter the location ID you would like to delete:' and a 'Delete' button. At the bottom is a table with three columns: 'Location Code', 'Location Name', and 'ID Location'.

Location Code	Location Name	ID Location
grb	AE Corporate Office - Burnaby	16
acc-b	AE Corporate Office - Burnaby - Accounting	46
ceo	AE Corporate Office - Edmonton	11
acc	AE Corporate Office - Edmonton - Accounting	45
fin	AE Corporate Office - Edmonton - Finance	44

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.

Add New Location

Enter the new location name:

Enter the new location code:

Update Existing Location

Enter the location ID you would like to update:

Enter a new location name (or leave it blank):

Enter a new location code (or leave it blank):

Delete Location

Enter the location ID you would like to delete:

Location Code	Location Name	ID Location
grb	AE Corporate Office - Burnaby	16
acc-b	AE Corporate Office - Burnaby - Accounting	48
ceo	AE Corporate Office - Edmonton	11
acc	AE Corporate Office - Edmonton - Accounting	45
fin	AE Corporate Office - Edmonton - Finance	53

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.

Add New Location

Enter the new location name:

Enter the new location code:

Add

Update Existing Location

Enter the location ID you would like to update:

Enter a new location name (or leave it blank):

Enter a new location code (or leave it blank):

Update

Delete Location

Enter the location ID you would like to delete:

Delete

Location Code	Location Name	ID Location
grb	AE Corporate Office - Burnaby	16
acc-b	AE Corporate Office - Burnaby - Accounting	46
ceo	AE Corporate Office - Edmonton	11
acc	AE Corporate Office - Edmonton - Accounting	45
fin	AE Corporate Office - Edmonton - Finance	44

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.