

CS319

Team 7

User Manual

Options Family Resource
Program Data Management
System

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Abbreviations/Terms:

CSV - Comma-separated values, a type of file used to store tabular data in text form

OFRPDMS - Options Family Resource Program Data Management System

The following terms are used interchangeably:

- Location
- Branch
- Program
- Center

General Information

1.1 User Overview

The “ Options Family Resource Program Data Management System” (OFRPDMS), was designed to facilitate many of the administrative tasks staff/volunteer members need to do for Options Family Resource Program.

Options Community Service Society currently has four different branches across Greater Vancouver

1.2 System Overview

“Options Family Resource Program Data Management System” (OFRPDMS) was designed to facilitate the daily administrative task of recording and reporting families who attend various drop in sessions across the various locations of Options Community Family Services centers.

OFRPDMS is a fully centralized system that enables multiple Options Community Family Service branches across Vancouver to collate their attendance records. The main features in this

systems includes :

- Registering a new family
- Signing in a returning family upon participation in a drop in session.
- Tracking items that a family has borrowed a library item from a center.
- Tracking referrals made by any of the center staff.
- Generating statistical reports recorded from each center.

Finally the OFRPDMS is a web based application that is compliant with most of the modern web browsers.

1.3 System Requirements

1.3.1 Browser Requirements:

- Internet Explorer 9.0 +
- Chrome Version 26.0 +
- Firefox Version 19.0+

1.3.2 Platform Requirements:

- Microsoft Windows Server 2008 R2

1.3.3 Database Requirements:

- Microsoft SQL Server 2008

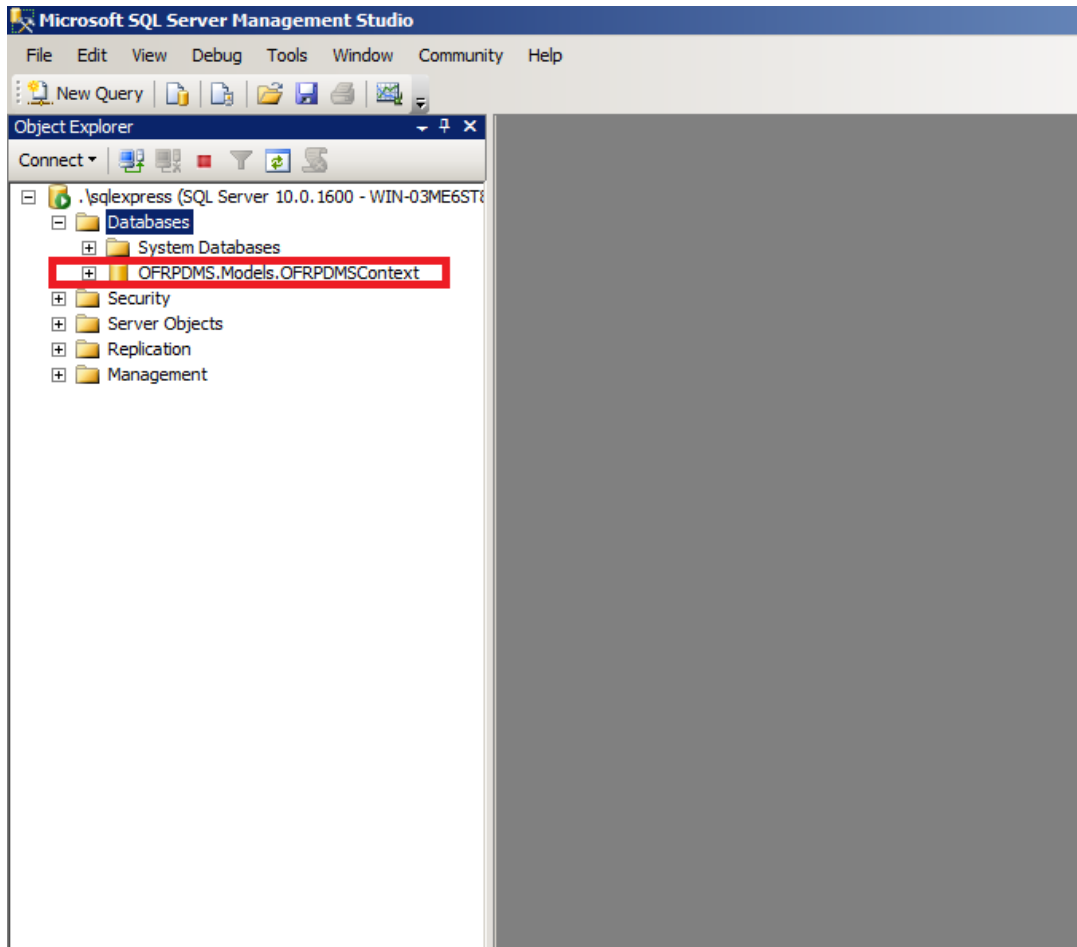
1.4 Installation

OFPRDMS requires Windows Server 2008 R2 and SQL Server 2008. Later versions may work, but have not been officially tested by the development team. A web deployment publish to external hosting is available. Please contact the developers for assistance, listed on page 40. Below are steps required to install the application on your own servers.

1.4.1 Database Creation

In this section, we will create the database that the application will use.

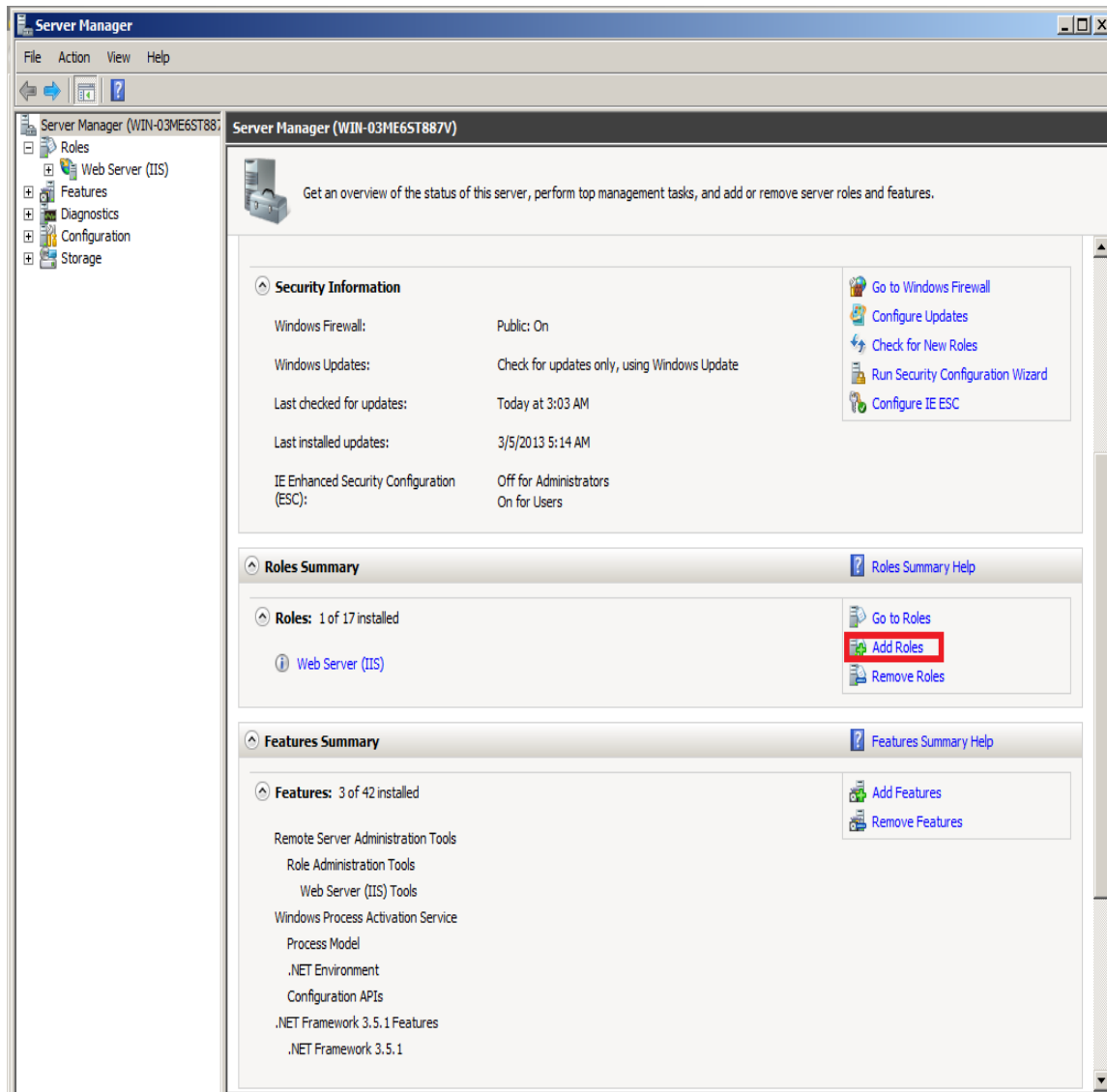
1. From the Start Menu, search for and run the SQL Server Management Studio
2. Open a connection to your database with administrative privileges to create a database
3. Under the Object Explorer in the left pane, right click the databases folder to create a new database called "OFRPDMS.Models.OFRPDMSContext"



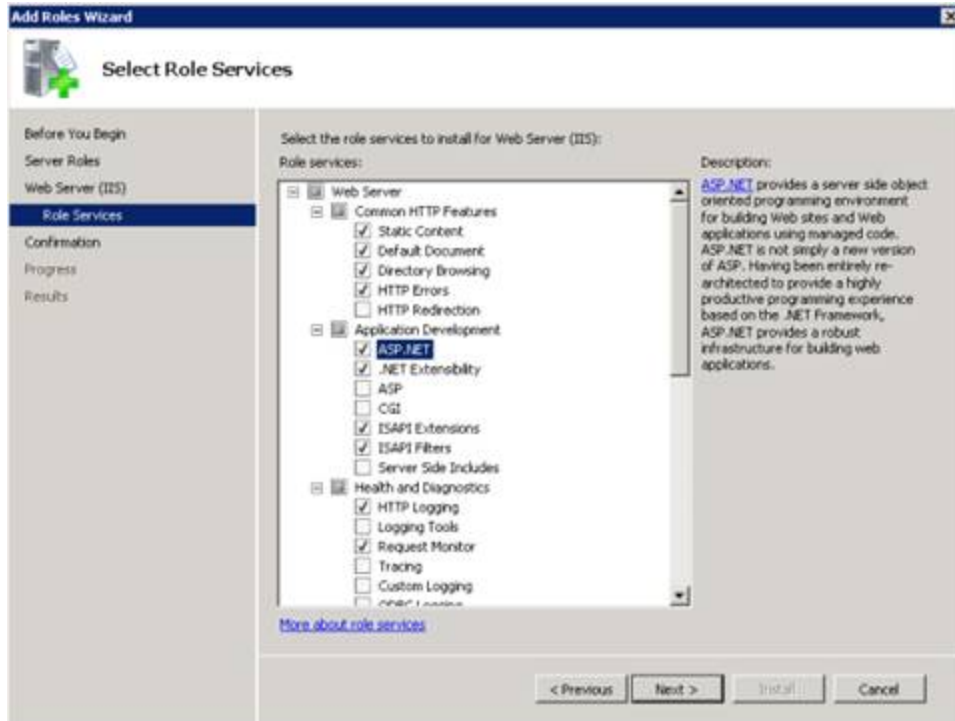
1.4.2 Server Setup

In this section, we will configure the server that the application is installed on.

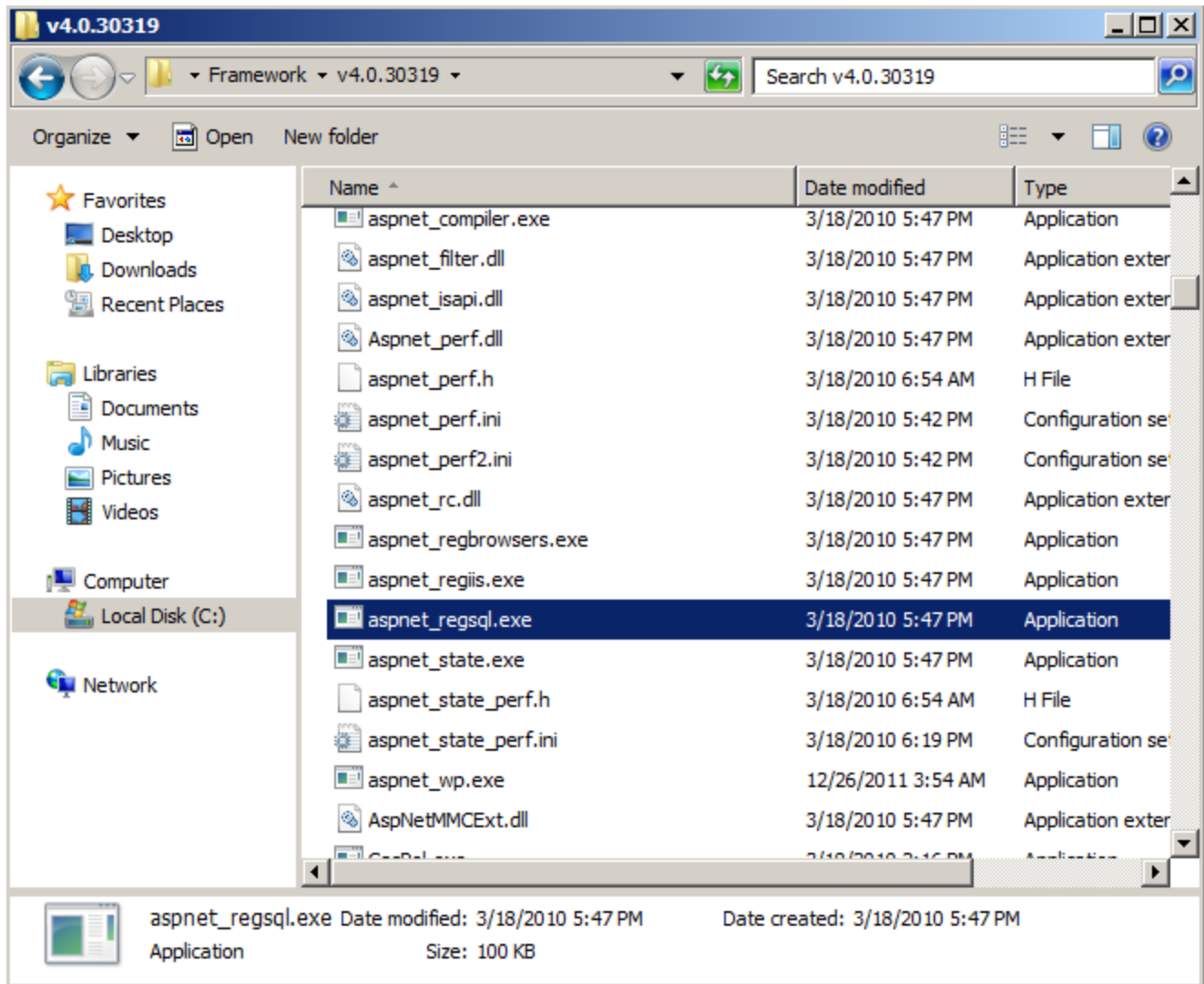
1. Open the Microsoft Server Manager
2. Install the Web Server (IIS) role for the server including the ASP.NET service



3. Ensure the role services are selected and complete the installation




4. Download and Install Microsoft .NET framework 4.0
<http://www.microsoft.com/en-us/download/details.aspx?id=17851>
5. Run the following tool that was provided after installing the .NET framework
"C:\Windows\Microsoft.NET\Framework\v4.0.xxxxx\aspnet_regsql.exe" where xxxxx is the revision of .NET that was installed. The directory can be viewed in windows explorer.



6. Select "Configure SQL server for application services"
7. In the server field, type the location of your SQL server and input your SQL server credentials.
8. When you click the Database dropdown box, the database that was created in section 1.4.1 should automatically be listed.

ASP.NET SQL Server Setup Wizard

 **Select the Server and Database**

Specify the SQL Server name, database name to create or remove, and the credentials to use when connecting to the database.

Note: The credentials must identify a user account that has permissions to create or remove a database.

Server:

☒ Windows authentication

☐ SQL Server authentication

User name:

Password:

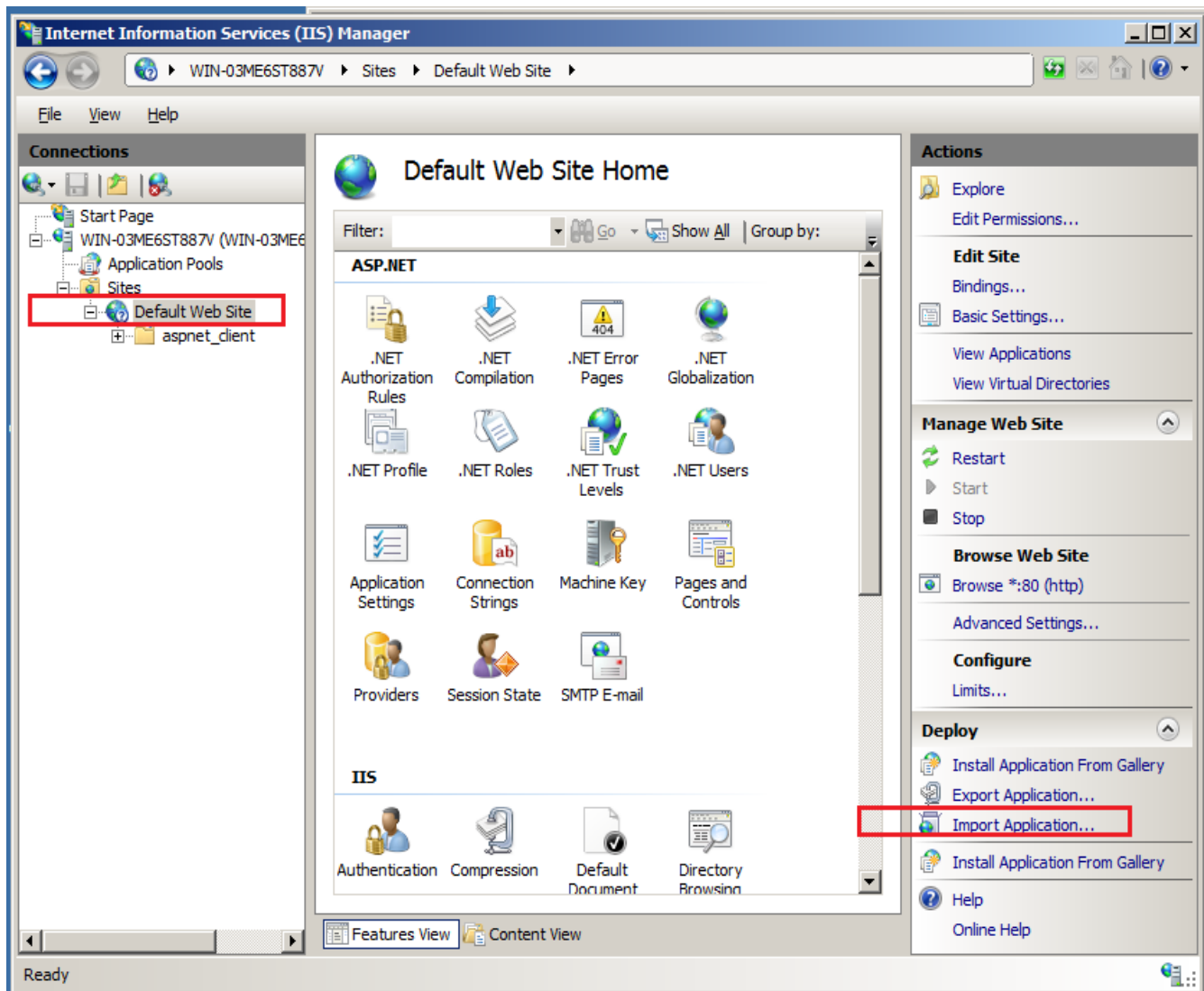
Database:
master
model
msdb
OFRPDMS.Models.OFRPDMSContext
tempdb

< Previous Next > Finish Cancel

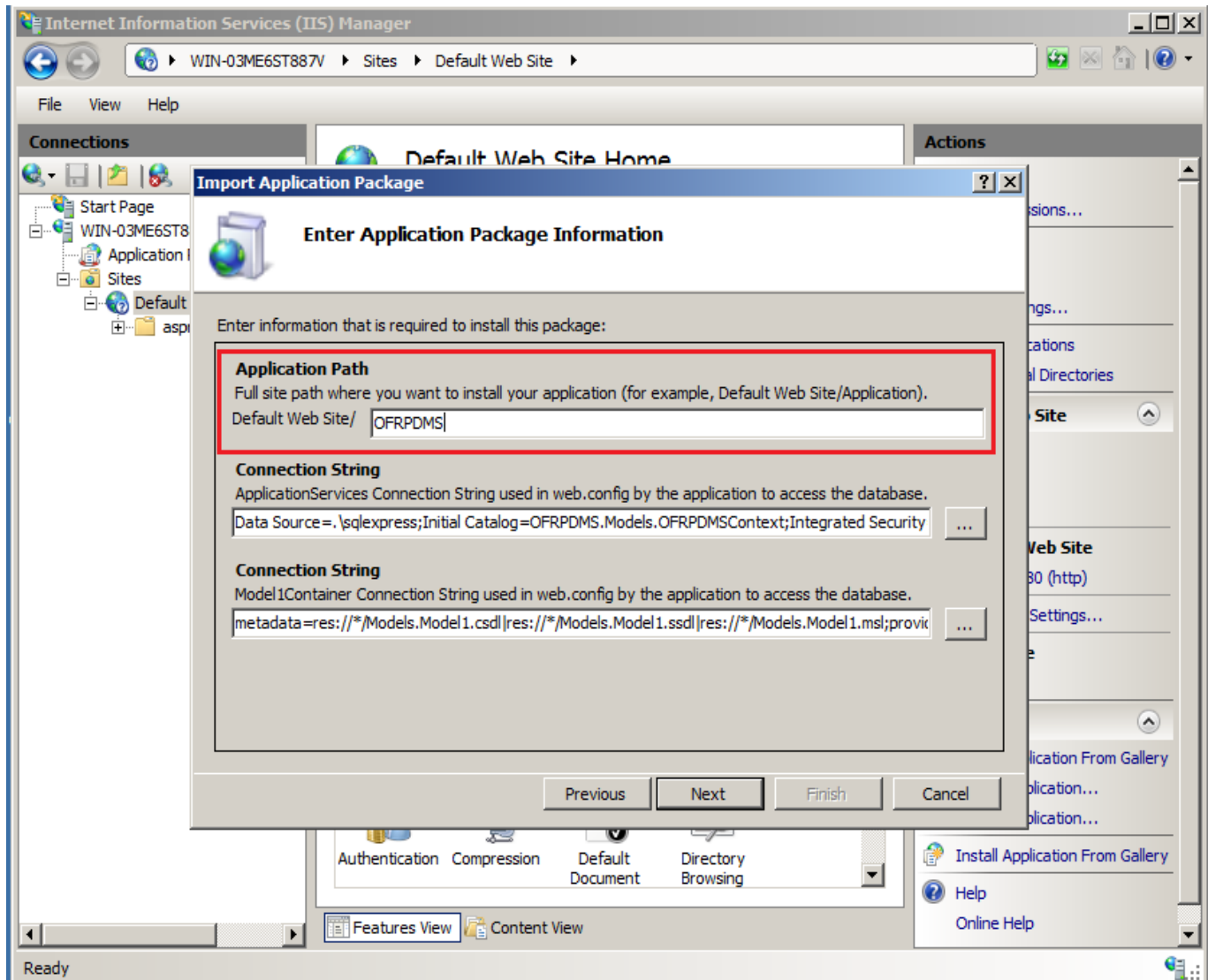
9. Click Next and complete the setup

1.4.3 Web Server (IIS) Setup

1. From the Start Menu, search for and run the Internet Information Services (IIS) Manager
2. Click on the “Default Web Site” on the left and then “Import Application...” on the right pane



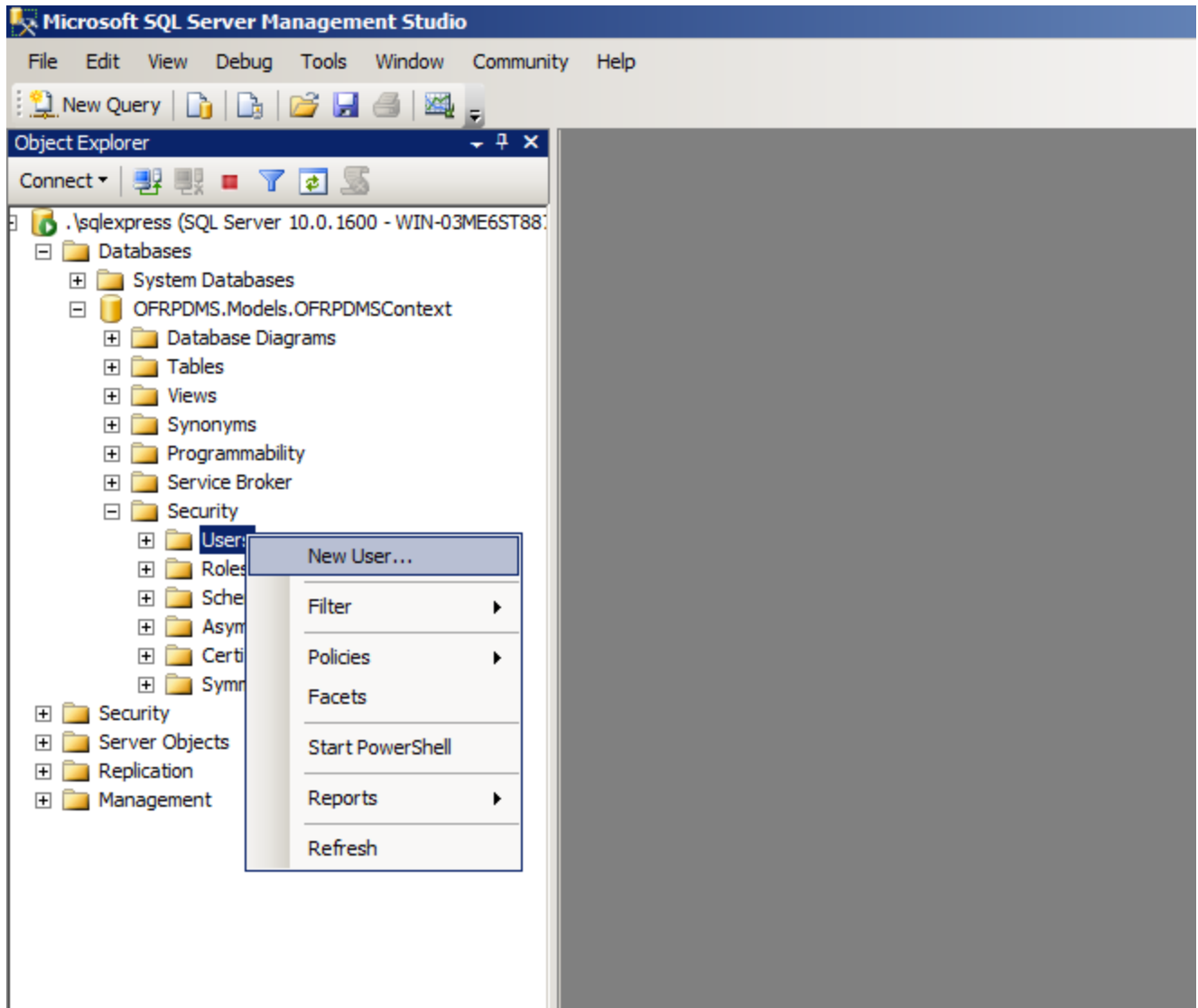
3. Locate the provided installation package, “OFRPDMS.zip”
4. Click next until the Application Path configuration page. Here, you may edit the path of the application. By default, it is OFRPDMS, and the application can be accessed by “http://yourdomain.com/ofrpdms”



5. When prompted to run in the default .NET 4.0 application pool, click Yes.

1.4.4 Configure Database Permissions

1. From the Start Menu, search for and run the SQL Server Management Studio
2. On the left pane, expand the database that was created in 1.4.1. Expand the security folder and create a new User.



3. In the Login name box, allow the Windows user "IIS APPPOOL\ASP.NET v4.0"
Under Roles, check all the roles prefixed with aspnet.
In addition, check the roles db_datareader, and db_datawriter

1.4.4 Accessing the Application

At this point, the application should be ready to access. You can verify setup by opening a browser on the server with the link <http://localhost/ofrpdms> unless this was changed in step 4 from section 1.4.3. You should be greeted with a screen to create the administrator account.

The screenshot shows a web browser window with the title "Register - Windows Internet Explorer". The address bar displays "http://localhost/OFRPDMS/". The page content is as follows:

Create New Account

Use the form below to create a new account.

Passwords are required to be a minimum of 6 characters in length.

Admin account has not been created yet. Use the form below to create one now.

User name

Email address

Password

Confirm password

Register

System Features

2.1 Account Roles

Upon initial account creation, a role is assigned to that user to facilitate access control as to restrict certain features and data access between different types of users.

2.1.1 Administrator Account (one per system)

The administrator account has access to all of participant's data at every program branch location. In addition, the administrator has the additional feature of compiling statistical reports for every branch location.

2.1.2 Staff Account

The staff account is associated with a branch location. Typically, the staff account is restricted to accessing participant data at their local branch. In addition, staff account cannot generate statistical reports.

2.2 System Features Summary

The following table summarizes all of OFRPDMS features with correspondence to which user type is permitted to use them.

Basic Features

Feature	Accessible by the Following Account Type
Registration	Admin
Login	Staff / Admin

Staff Account Creation	Admin
------------------------	-------

Family Related Features

Registering a Family	Staff / Admin
Signing a family into a session	Staff / Admin
Name search for a family member (primary/secondary guardian, and children)	Staff / Admin
View family details	Staff / Admin
Edit family details	Admin
Delete family	Admin

Branch/Location/Center Related Features

Creating a new branch / location	Admin
Editing branch information.	Admin (all branches)

Sessions Related Features

Create a new special event.	Admin / Staff
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Report Generating Features

Generate reports for each center between two dates.	Admin
Checking Family's attendance history.	Admin

Library Item Related Features

Creating new library items.	Admin (all branches) Staff (local branch)
Check out library items that have been	Admin (all branches)

borrowed by families.	Staff (local branch)
-----------------------	----------------------

Resources(Pamphlets)/Referrals Features

Create a new resource/referral.	Admin (all branches) Staff (local branch)
Count how many resources/referrals are handed out/made.	Admin (all branches) Staff (local branch)

2.3 Basic Features

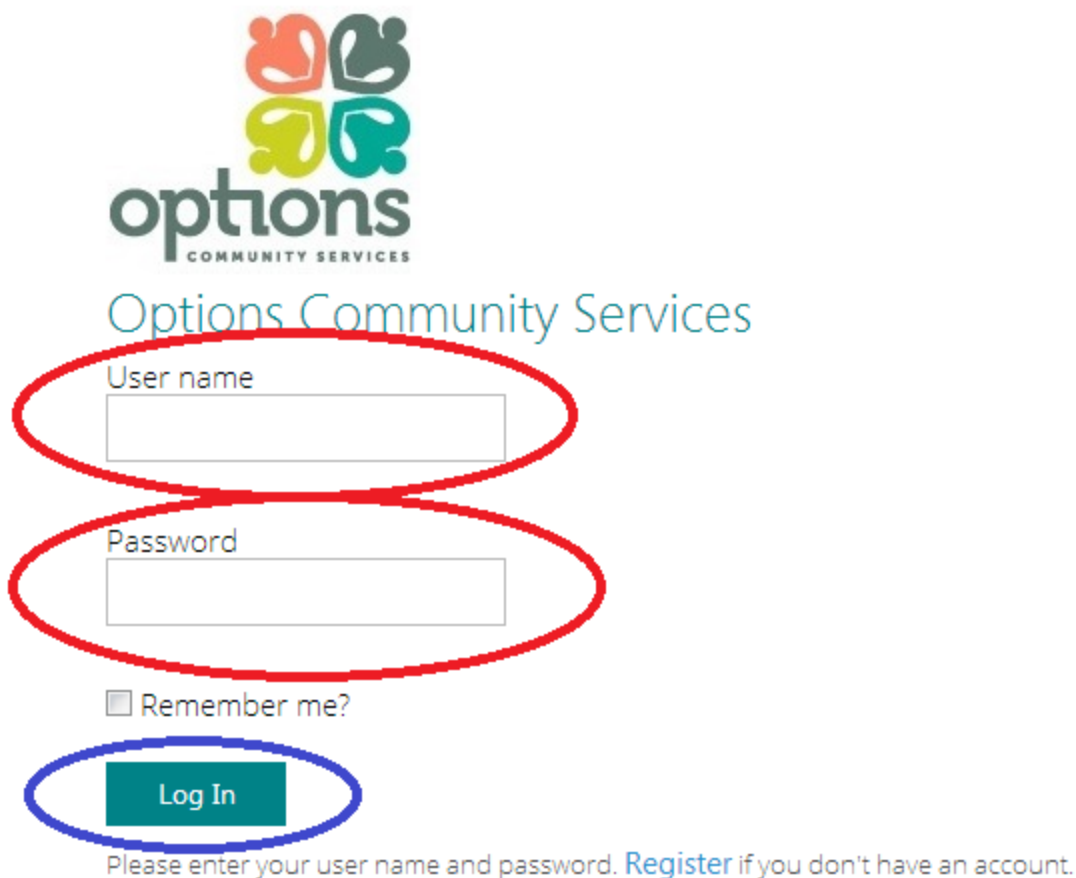
2.3.1 Account Registration

(a) Administrator account : admin account has access to all of the data and functionalities of the system.

(b) Staff Account : staff account can only access his/her local center's user data.

2.3.2 Login

1. To login simply fill in your username and password then click “Log In”



The image shows the login page for Options Community Services. At the top is the logo, which consists of four stylized human figures in orange, grey, yellow, and teal, arranged in a square. Below the logo is the text "options" in a bold, lowercase font, with "COMMUNITY SERVICES" in a smaller, uppercase font underneath. Below this is the text "Options Community Services" in a teal, sans-serif font. The login form includes a "User name" label and a text input field, both circled in red. Below that is a "Password" label and a text input field, also circled in red. Under the password field is a checkbox labeled "Remember me?". Below the checkbox is a teal "Log In" button, circled in blue. At the bottom of the form is a line of text: "Please enter your user name and password. [Register](#) if you don't have an account."

options
COMMUNITY SERVICES

Options Community Services

User name

Password

☐ Remember me?

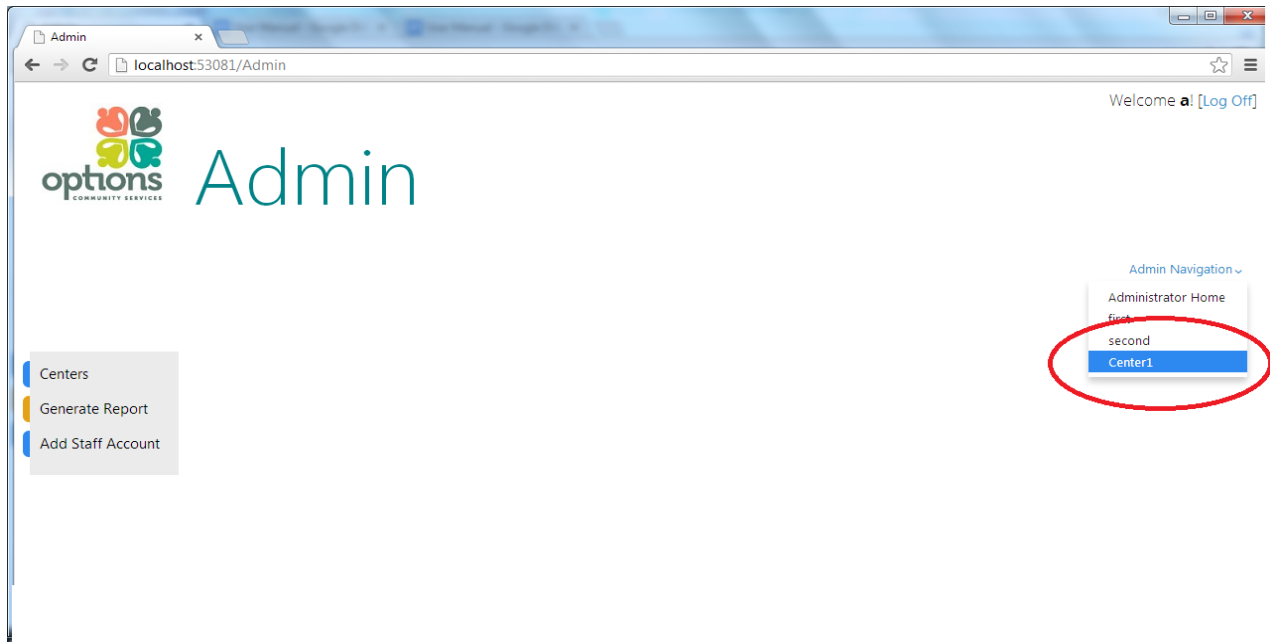
Log In

Please enter your user name and password. [Register](#) if you don't have an account.

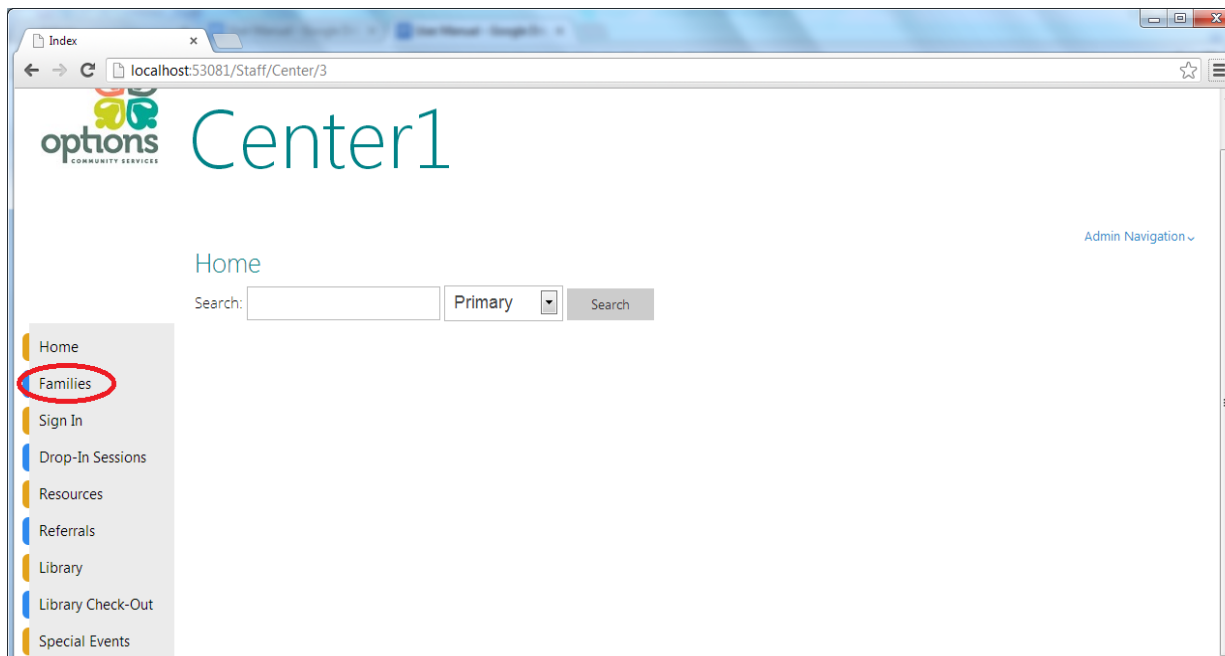
2.4 Family Related Features

2.4.1 Registering a family

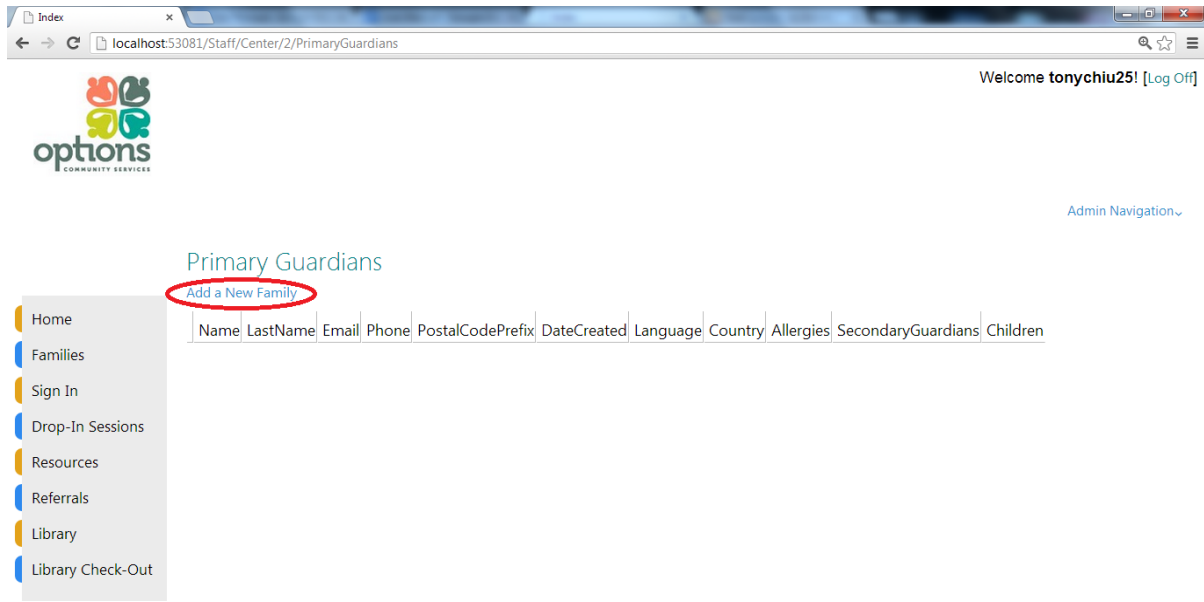
1. Each family consists of a primary guardian representative that submits an application to a branch, after that the entire family will be referenced by the primary guardian's first name. To register a family, as an admin, first navigate to the destination branch, as a staff user, they are automatically redirected to their local branch page upon login.



2. Next Click on the “Families” tab.



3. Once directed to this page, click on the “Add a New Family” link.




4. Fill in the following family information and then click “Create”; notice only the First name field is required, the rest are optional. Children and secondary guardians can also be added during this step by clicking on the “add more children” or “add more secondary guardian” buttons.

Create x

localhost:53081/Staff/Center/1/PrimaryGuardians/Create

Welcome **steven!** [\[Log Off\]](#)



Admin Navigation ▾

Add a New Family

Home Families Sign In Drop-In Sessions Resources Referrals Library Library Check-Out Special Events

FirstName

LastName

Email

Phone

PostalCodePrefix

Language

Country

5. Congratulations! You have successfully added Ruby Heart and her family.

options COMMUNITY SERVICES

Welcome **tonychiu25!** [Log Off]

Admin Navigation

Primary Guardians

[Add a New Family](#)

	Name	LastName	Email	Phone	PostalCodePrefix	DateCreated	Language	Country	Allergies	SecondaryGuardians	Children
Edit Details Delete	Ruby	Heart				30/03/2013			None	None	None

- Home
- Families
- Sign In
- Drop-In Sessions
- Resources
- Referrals
- Library
- Library Check-Out

2.4.2 Searching for family members

1. For admins use the “Admin Navigation” dropdown to navigate to the desired center. Staff will be automatically redirected to their local center upon login. Use the navigation panel on the left, click on the “Families” tab.

options COMMUNITY SERVICES

Welcome **a!** [Log Off]

Admin Navigation

Primary Guardians

[Add a New Family](#)

Quick Search: [Search](#)

	First Name	Last Name	Email	Phone	Postal Code	Date Created	Language	Country	Allergies	Secondary Guardian	Children
Edit Delete Details	Kevin	A	aaaa@a.com	33333		2013/3/30	English	China	rice and peanuts	None	3
Edit Delete Details	Peter	Moon				2013/3/29			None	None	None

Page 1 of 1 << < Prev Next > >>

- Home
- Families**
- Sign In
- Drop-In Sessions
- Resources
- Referrals
- Library
- Library Check-Out
- Special Events

localhost:53081/Staff/Center/1/PrimaryGuardians?sortOrder=Na...

2. In Quick Search, type information related to the families you want to search for, such as names, phone number etc.

The screenshot shows a web browser window with the URL `localhost:53081/Staff/Center/1/PrimaryGuardians`. The page features the 'options first' logo and a sidebar with navigation links: Home, Families, Sign In, Drop-In Sessions, Resources, Referrals, Library, Library Check-Out, and Special Events. The main content area is titled 'Primary Guardians' and includes a 'Quick Search' field with the text 'Kevin' and a 'Search' button. Below the search bar is a table of family records.

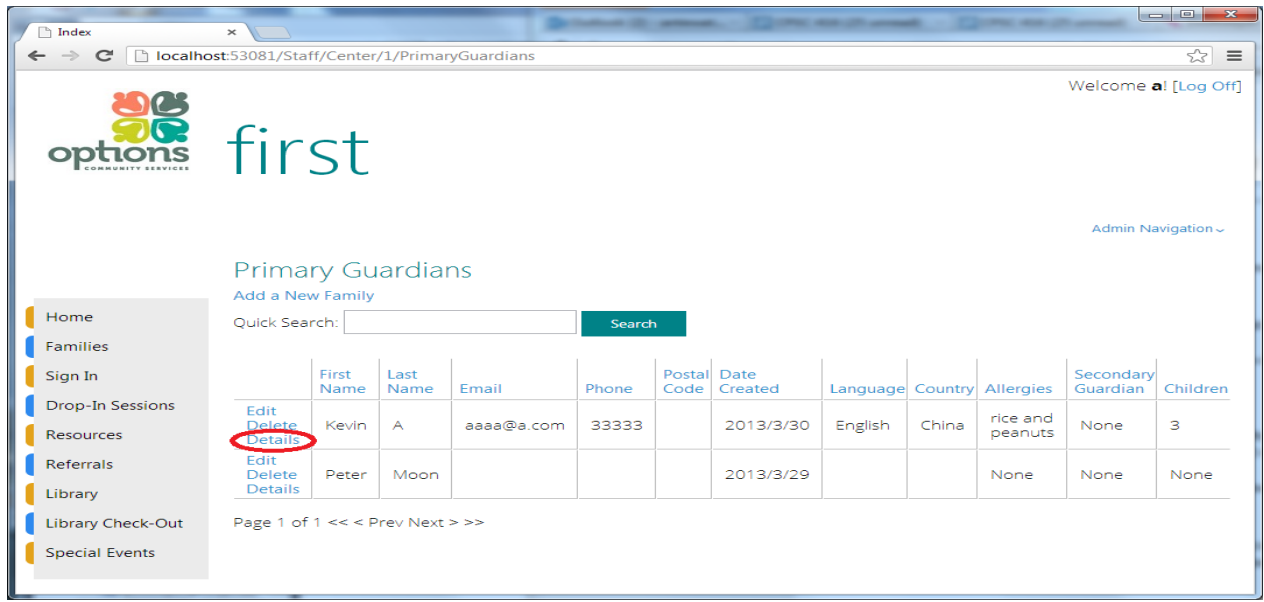
	First Name	Last Name	Email	Phone	Postal Code	Date Created	Language	Country	Allergies	Secondary Guardian	Children
Edit Delete Details	Kevin	A	aaaa@a.com	33333		2013/3/30	English	China	rice and peanuts	None	3
Edit Delete Details	Peter	Moon				2013/3/29			None	None	None

Page 1 of 1 << < Prev Next > >>

3. Click search or press return key to finish. A list of families with matching attributes will be displayed.

2.4.3 Viewing a family's details

1. After following steps in 2.4.2, you should see a list of families with matching attributes(if there is any in the database)
2. Click "Details" beside the family to view details.



2.4.4 Editing a family's details

1. You must log in as Admin to edit a family
2. As the Admin, you can follow steps in 2.4.2 to search for the family you want to edit
3. Click "Edit" beside the family
4. Make any changes and click the Save button

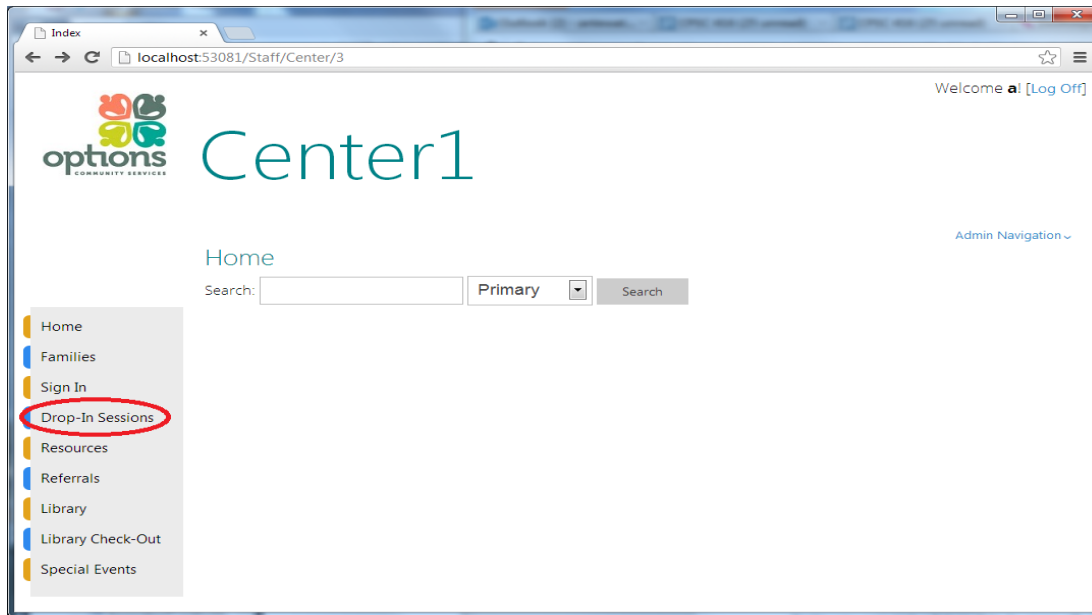
2.4.5 Deleting a family

1. Similar to Editing a family in 2.4.4, you can click "Delete" beside a family
2. On confirmation page, click Delete button to confirm deletion.

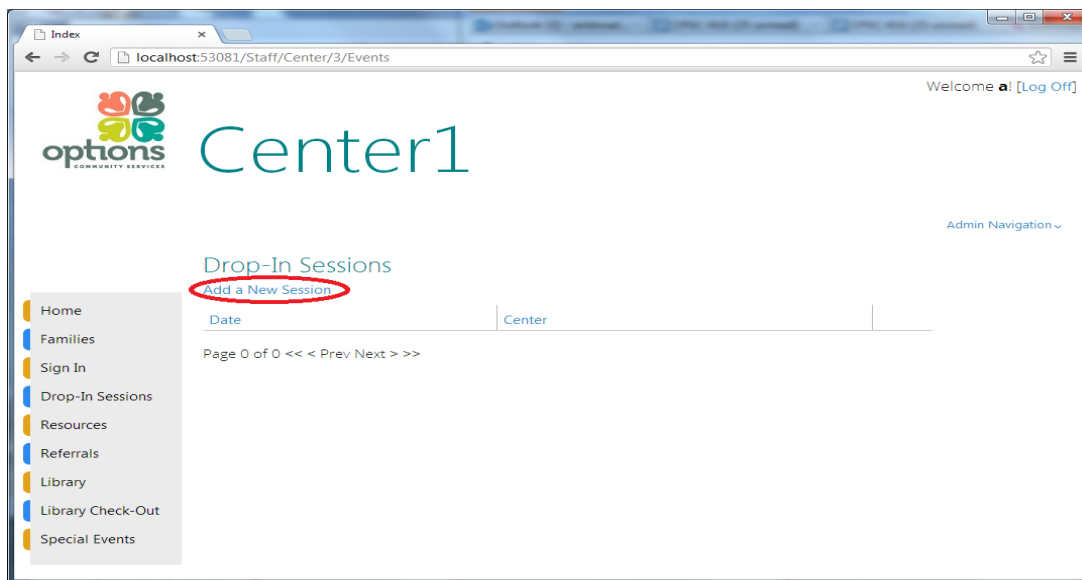
2.5 Signing a family into session

2.5.1 Create a Drop-In Sessions

1. Click "Drop-In Sessions" on the navigation panel to the left.



2. Click “Add a New Session



3. Pick the date of the Drop-In session and click “Create” button.

*note: you can pick a future date by manually modifying the date picked using the graphical calendar.

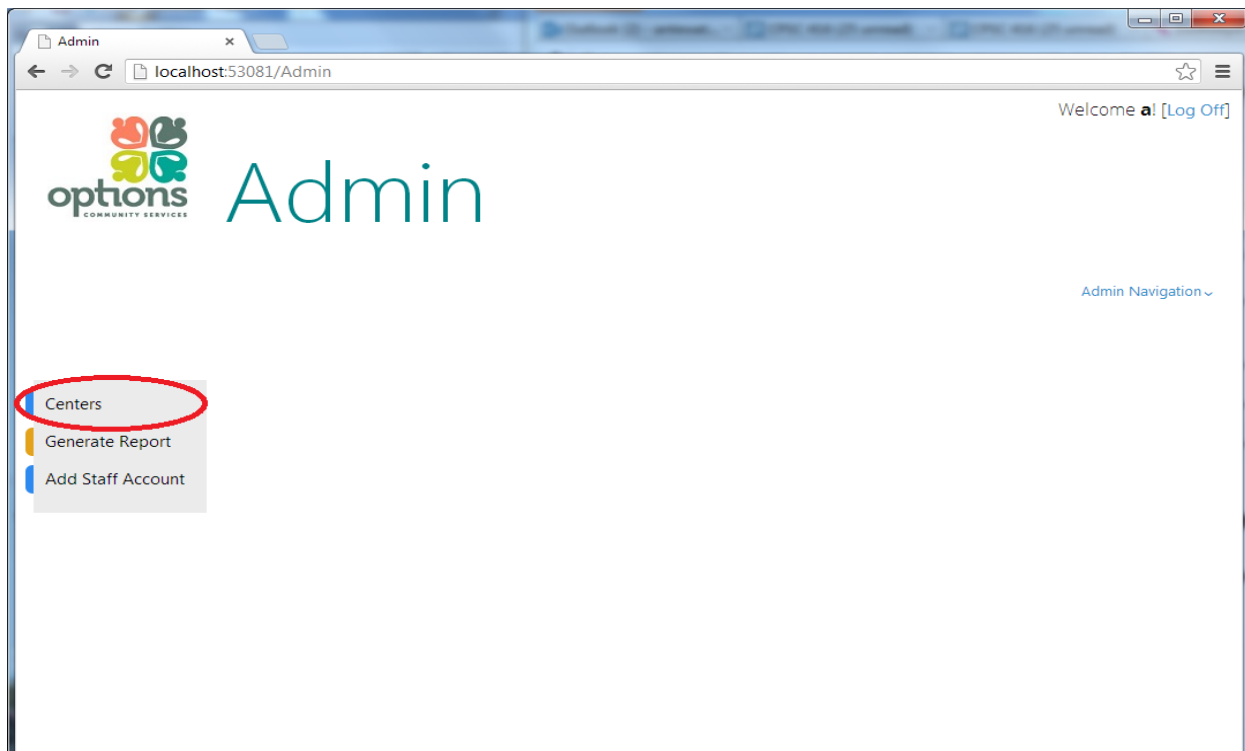
2.5.2 Sign In

1. Click “Sign In” on the navigation panel.
2. Click “Create New”.
3. Use the drop-down box to select the participant type and enter some keyword to search for people.
4. In the drop-down, select a date you want to use for sign in.
5. Click the “Add” button beside the person you want to sign in for the chosen date
6. Repeat step 3-5 to sign more people in if there are more.
7. When you are done, click “Back to List”
8. You can view who are signed in on a particular date by selecting a date using the drop-down.

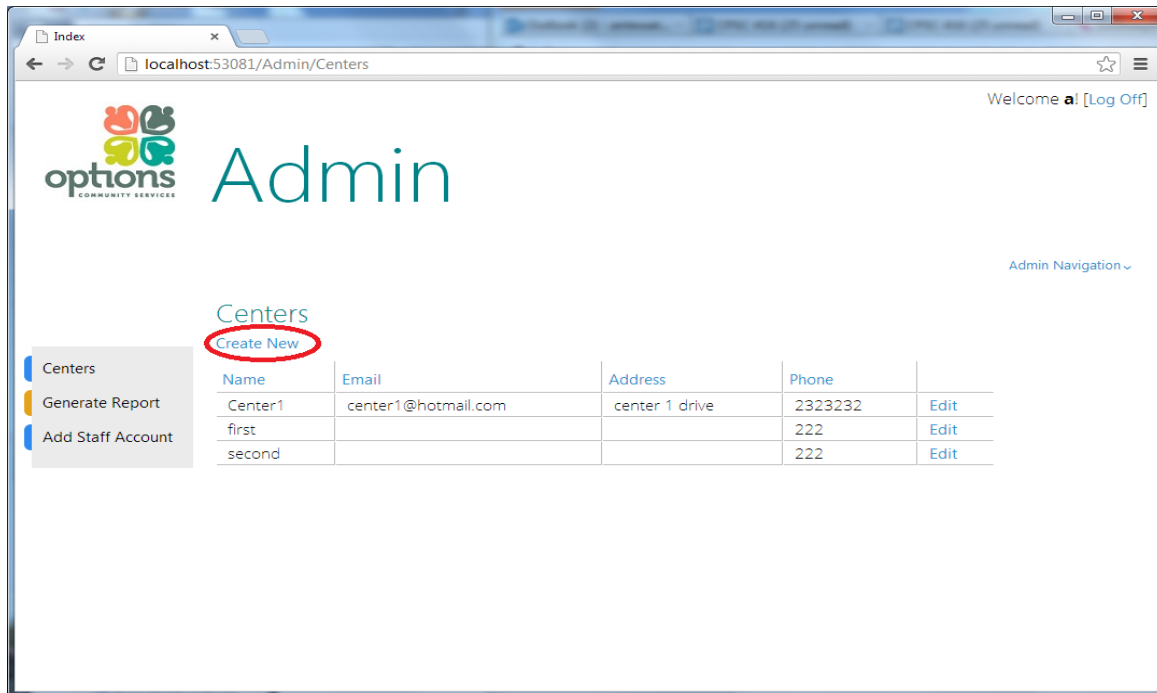
2.6 Branch Related Features (Admin user only)

2.6.1 Creating a new branch

1. In the admin page, click on Centers.



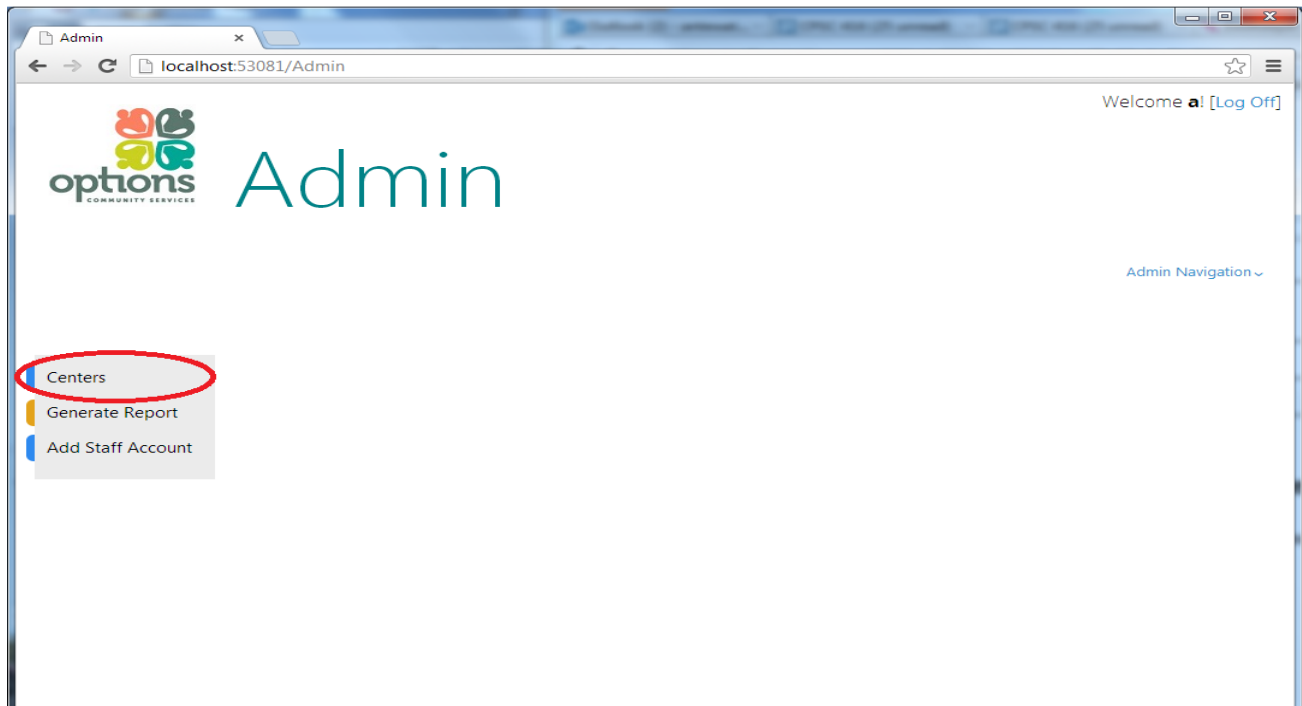
2. Then Click on the “Create New” link.



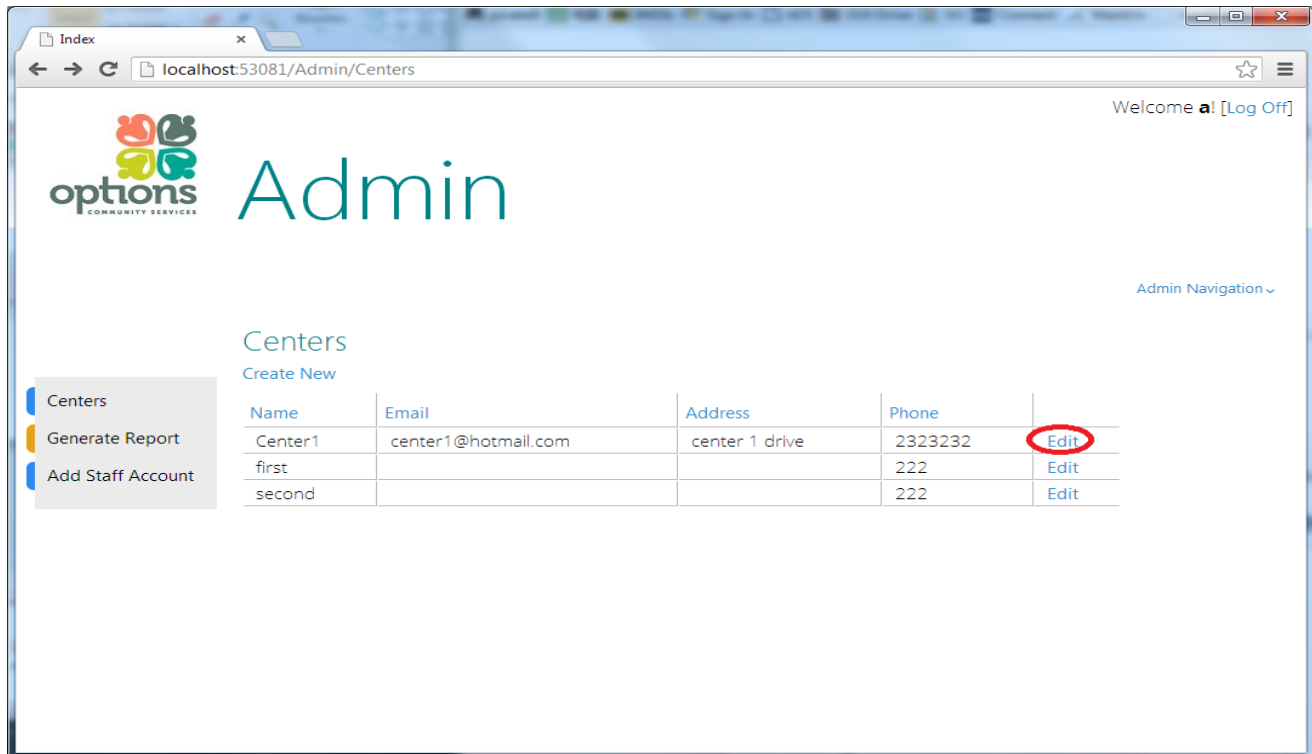
3. You will be directed to a “Create New Center” form; fill in all of the fields and click “Create” to create a new branch location.

2.6.2 Editing branch information

1. In the admin page, click on the “Centers” tab on the left.



2. Click on the “Edit” link to edit the center information.

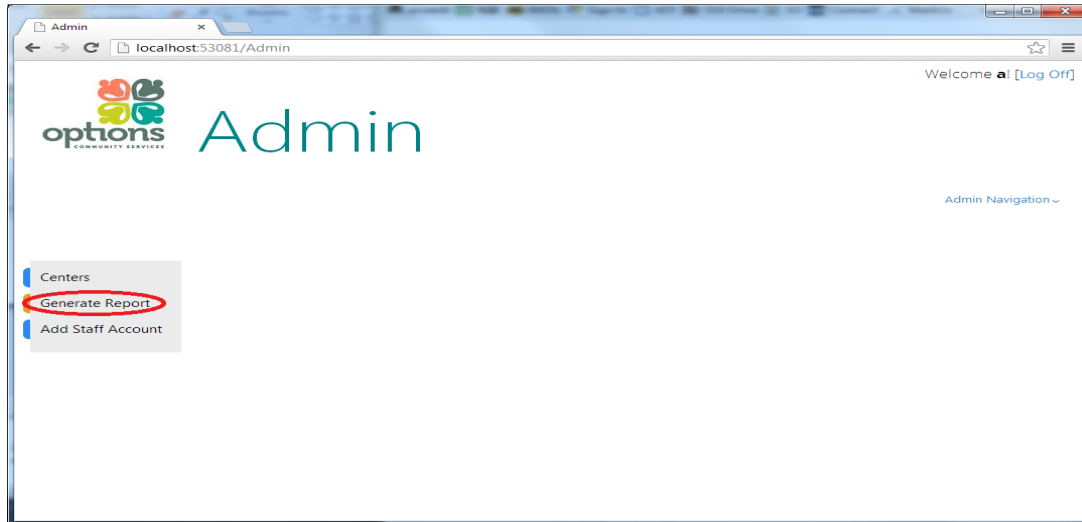


3. Click “Save” to update.

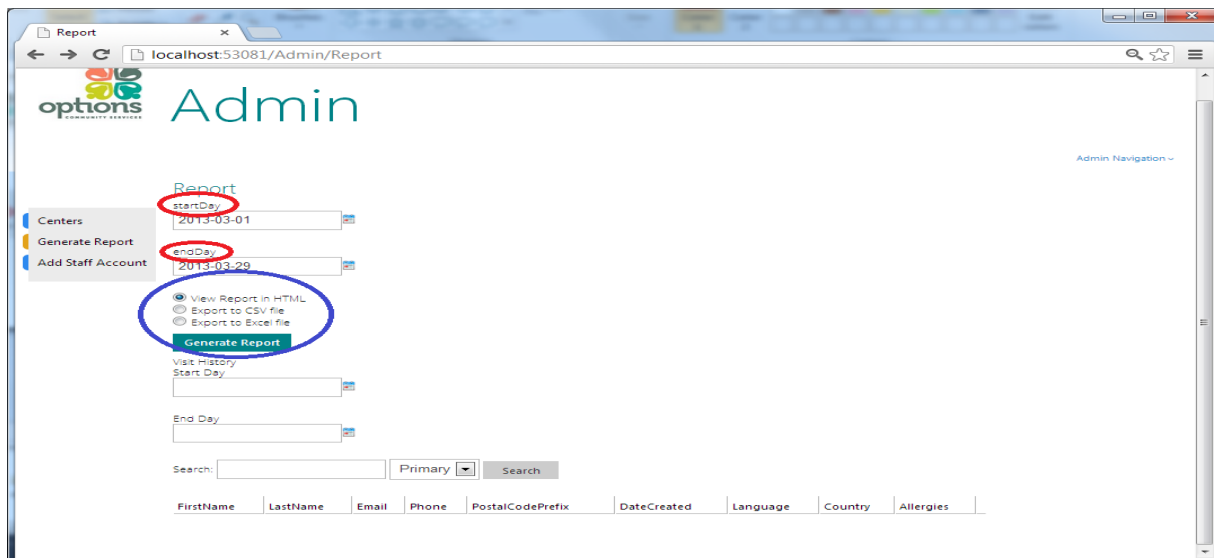
2.6 Report Generation (Admin user only)

2.6.1 Generating a report

1. In the admin page, click on “Generate Report” tab on the left.



2. Select a start date, end date, and choose one of the three export options: Html, CSV, or Excel. Click “Generate Report” to generate the report for the chosen interval.



2.6.2 Checking Family’s attendance history

1. In the admin page, click on “Generate Report” tab on the left.
2. In the bottom half section, input the “Start Day”, “End Day”.

3. Fill in the name of a primary guardian or a child that you want to view then click search. In the generated table, click “Check Visit History” to see the attendance history for that particular individual.

The screenshot shows the 'Admin Report' interface. On the left, there's a sidebar with 'Centers', 'Generate Report', and 'Add Staff Account'. The main area has a 'Report' section with 'startDay' and 'endDay' date pickers, radio buttons for 'View Report in HTML', 'Export to CSV file', and 'Export to Excel file', and a 'Generate Report' button. Below this, there's a search section with 'Start Day' (2013-03-01), 'End Day' (2013-03-29), a search input containing 'Peter', a 'Primary' dropdown, and a 'Search' button. A table below shows results for 'Peter' with a 'Check Visit History' button. Red circles highlight the search input, the 'Primary' dropdown, and the 'Check Visit History' button. A blue circle highlights the 'Search' button.

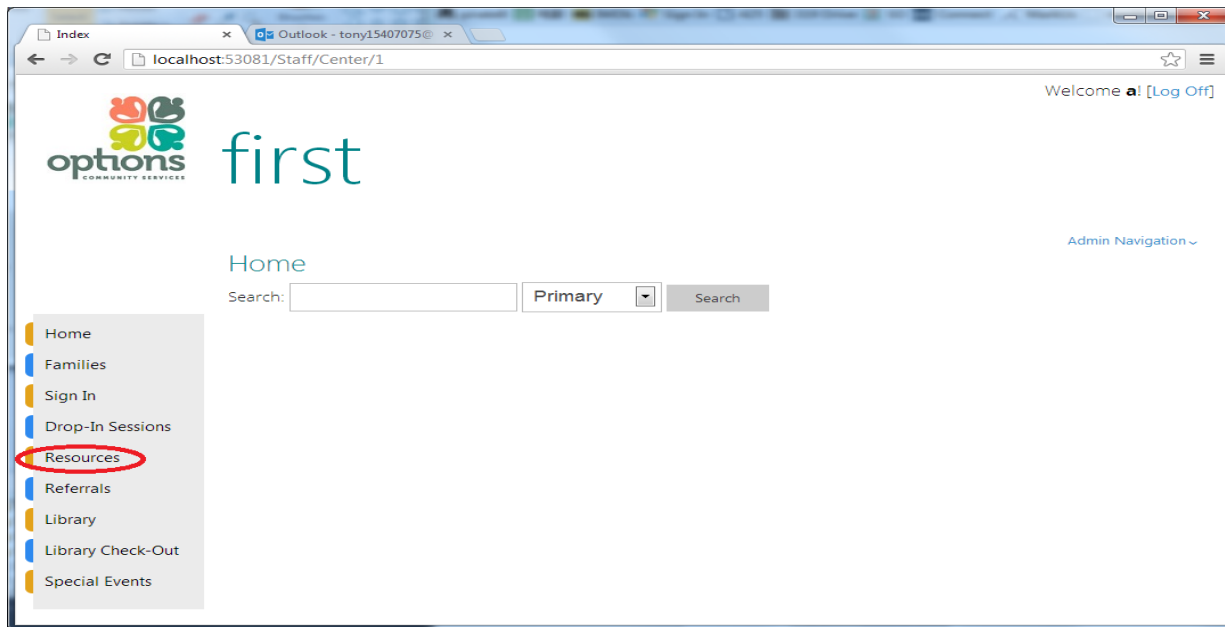
FirstName	LastName	Email	Phone	PosteCodePrefix	DateCreated	Language	Country	Allergies
Peter	Moore				2013/3/29 22:01:40			

Additional Features

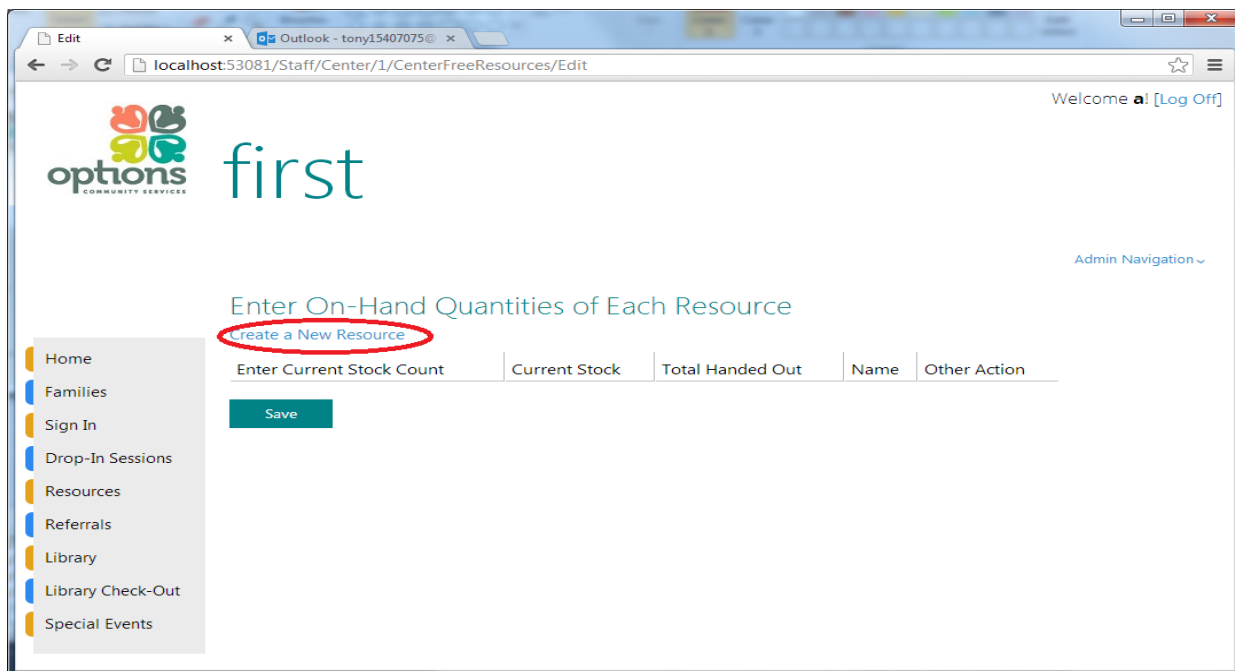
3.1 Resources (Pamphlets)

3.1.1 Add a New Resource

1. Click “Resources” on the navigation panel.



2. Click “Create a New Resource”

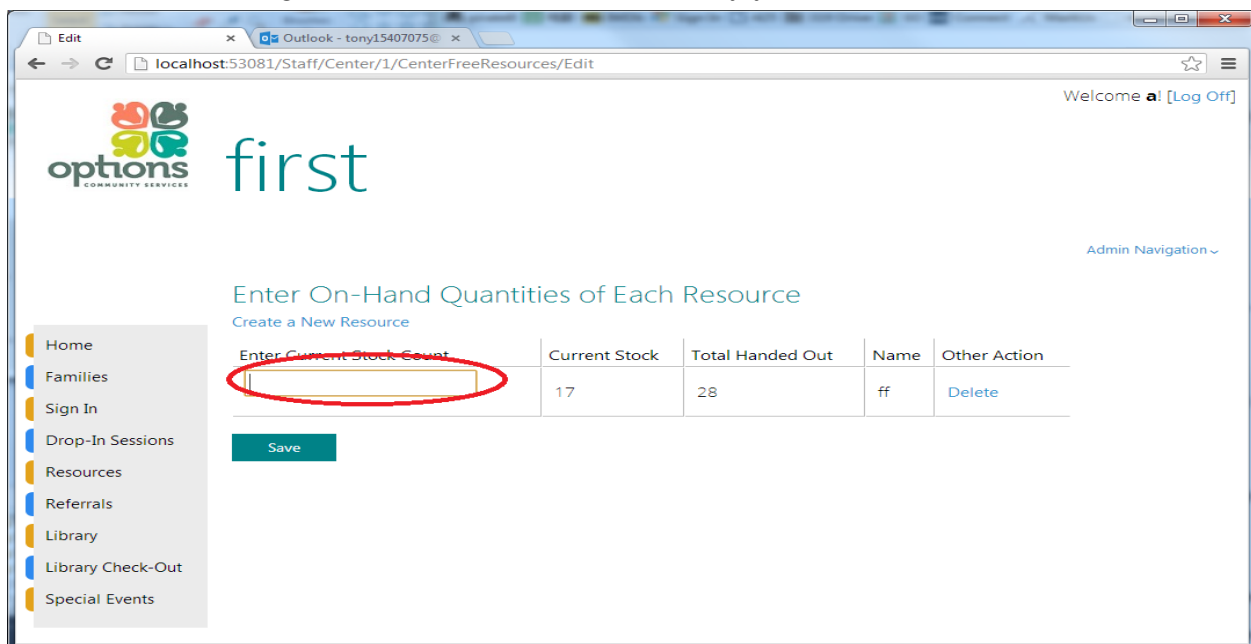


3. Enter how many you currently have and the name of the resource(pamphlet)

4. Click the Create button

3.1.2 Update Resources

1. Click “Resources” on the navigation panel.
2. You can see a list resources the center has.
3. To update how many resources you handed out, you can either:
 - a. Enter a positive number to the “Enter Current Stock Count” column indicate how many you have currently. If you entered less than the number shown in the column “Current Stock”, the system will compute the difference between the current stock and the entered value. To restock a resource, enter a positive number higher than the “Current Stock” number.
 - b. Or, enter a negative number to indicate how many you have **handed out**



The screenshot shows a web application interface for 'first' (First Options Community Services). The page title is 'Enter On-Hand Quantities of Each Resource'. Below the title is a link 'Create a New Resource'. The main content area contains a table with the following data:

Enter Current Stock Count	Current Stock	Total Handed Out	Name	Other Action
<input type="text"/>	17	28	ff	Delete

Below the table is a green 'Save' button. On the left side, there is a navigation panel with links: Home, Families, Sign In, Drop-In Sessions, Resources, Referrals, Library, Library Check-Out, and Special Events. The 'Resources' link is highlighted. In the top right corner, there is a 'Welcome a! [Log Off]' message and an 'Admin Navigation' dropdown menu.

4. Click the Save button once you are done for all the resources you want to update.

3.1.3 Delete a resource

1. Click “Resources” on the navigation panel.

2. Click “Delete” beside the resource you want to delete.

The screenshot shows a web browser window with the URL `localhost:53081/Staff/Center/1/CenterFreeResources/Edit`. The page features the 'options first' logo and a navigation menu on the left. The main content area is titled 'Enter On-Hand Quantities of Each Resource' and includes a 'Create a New Resource' link. Below this is a table with the following data:

Enter Current Stock Count	Current Stock	Total Handed Out	Name	Other Action
<input type="text"/>	17	28	ff	Delete

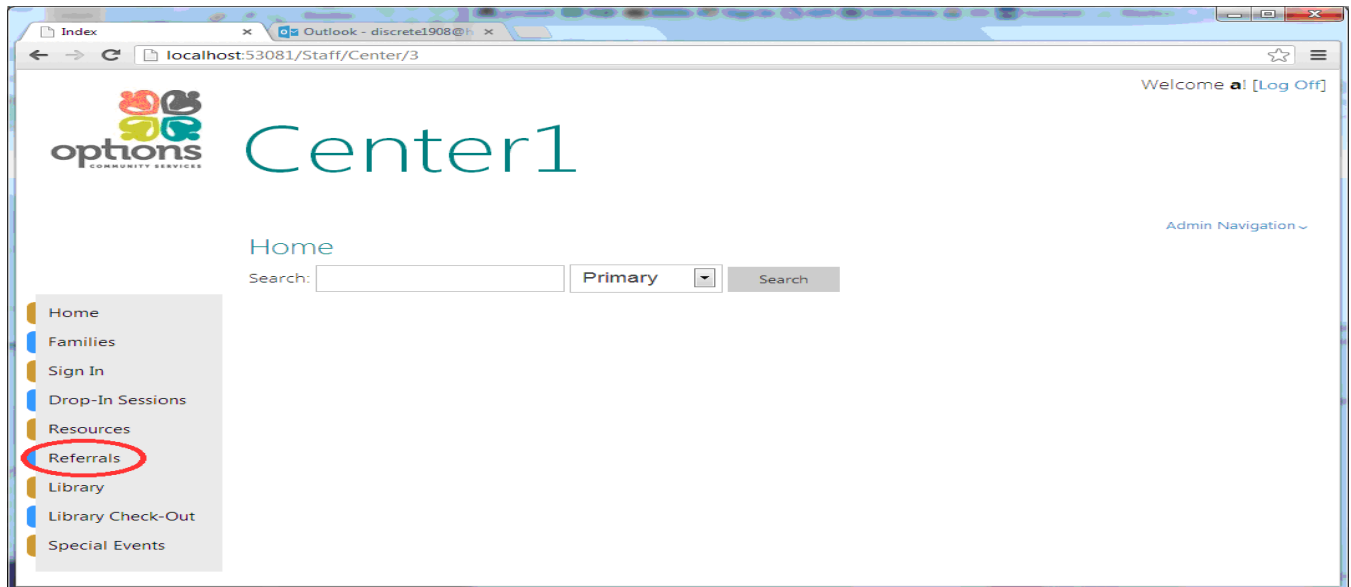
A green 'Save' button is located below the table. The 'Delete' link in the 'Other Action' column is circled in red.

3. Click Delete button to confirm, or “Back to List” to cancel.

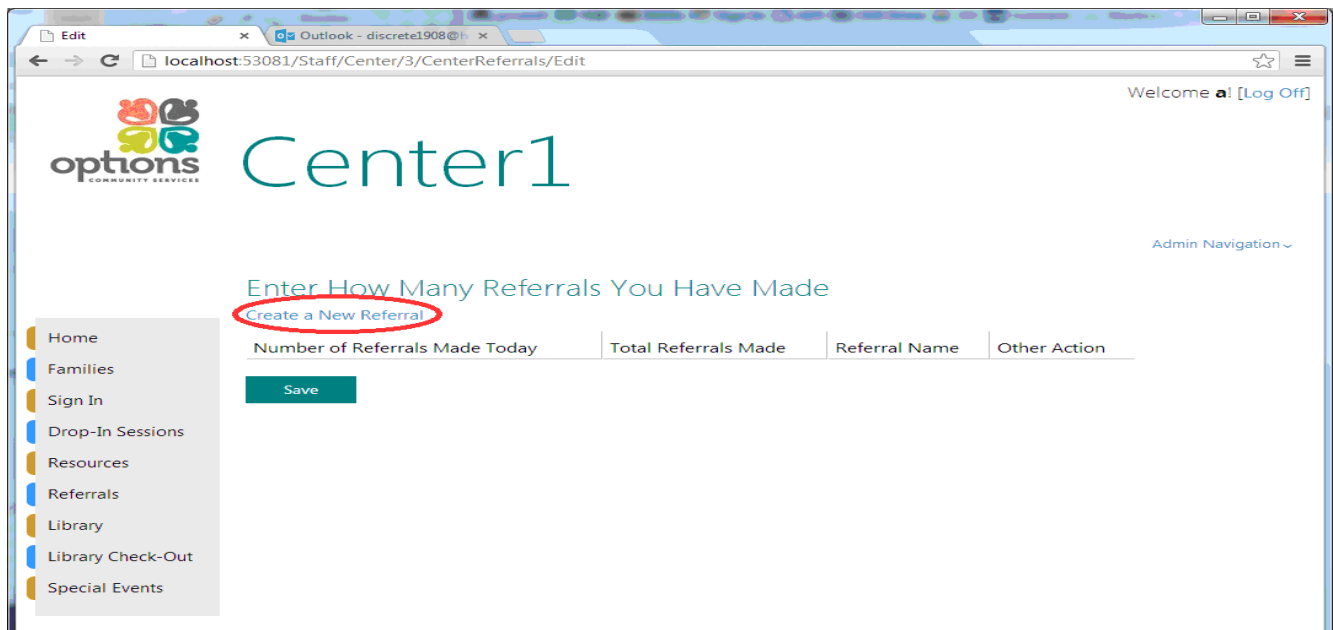
3.2 Referrals

3.2.1 Add a New Referral

1. Click “Referrals” on the navigation panel.



2. Click “Create a New Referral”



3. Enter a name for the referral

4. Click the Save button.

3.2.2 Update Referrals (Similar to add)

1. Click “Referrals” on the navigation panel.

2. Enter a positive number to update how many referrals you have made.

options Center1

Welcome a! [Log Off]

Admin Navigation

Enter How Many Referrals You Have Made

Create a New Referral

Number of Referrals Made Today	Total Referrals Made	Referral Name	Other Action
0	0	Thom	Delete

Save

Home
Families
Sign In
Drop-In Sessions
Resources
Referrals
Library
Library Check-Out
Special Events

3. Click the Save button once you are done for all the referrals you want to update

3.2.3 Delete a Referral

1. Click "Referrals" on the navigation panel.
2. Click "Delete" beside the referral you want to delete

options Center1

Welcome a! [Log Off]

Admin Navigation

Enter How Many Referrals You Have Made

Create a New Referral

Number of Referrals Made Today	Total Referrals Made	Referral Name	Other Action
0	0	Thom	Delete

Save

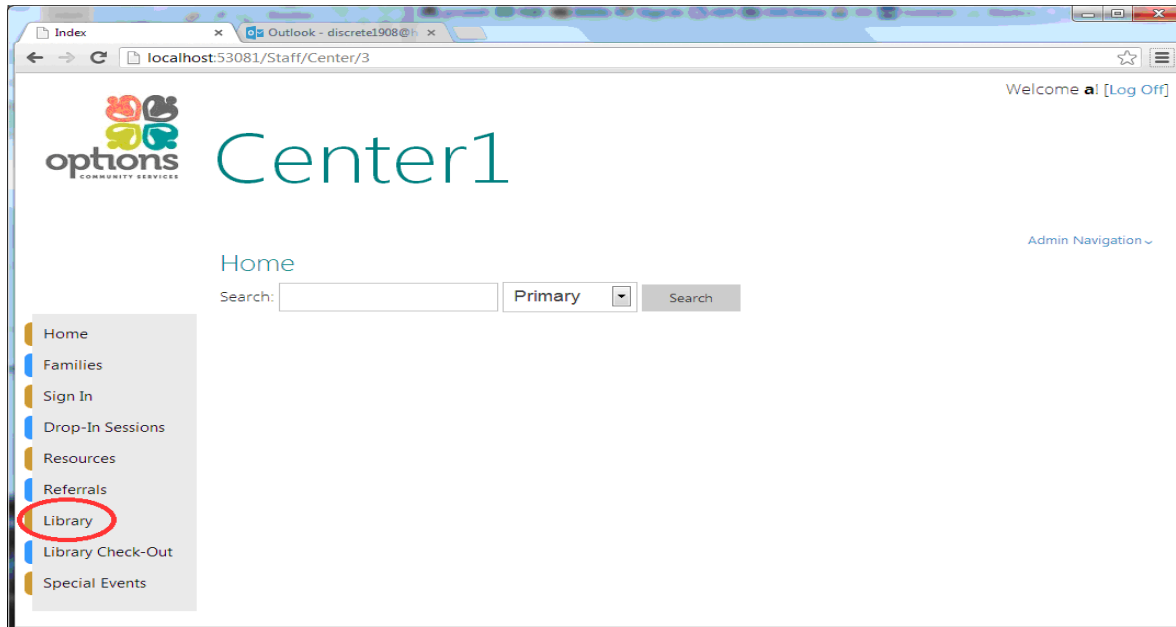
Home
Families
Sign In
Drop-In Sessions
Resources
Referrals
Library
Library Check-Out
Special Events

3. Click Delete button to confirm or "Back to List" to cancel.

3.3 Library

3.3.1 Add a Library Item

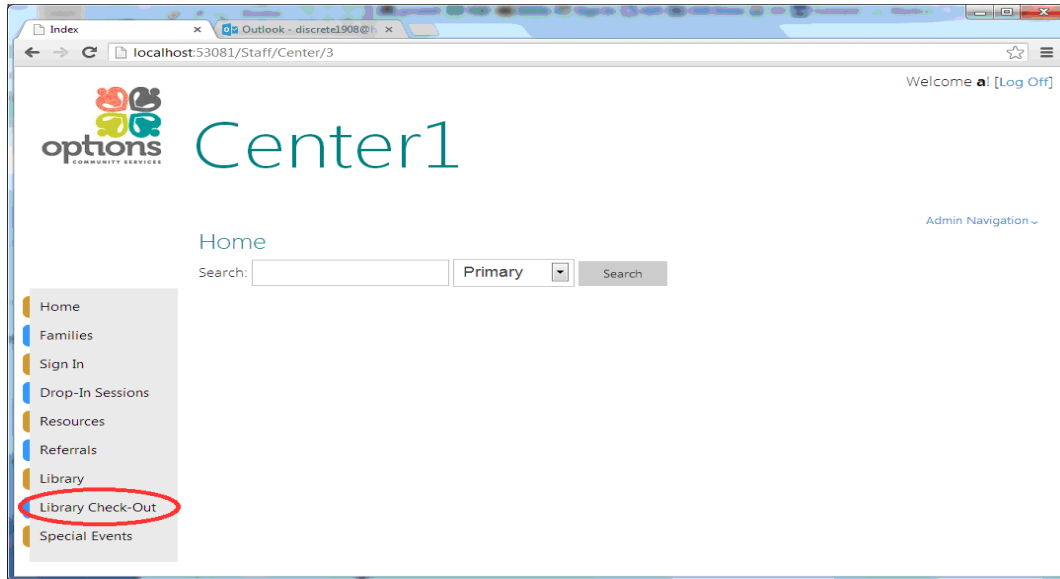
1. Click “Library” on the navigation panel



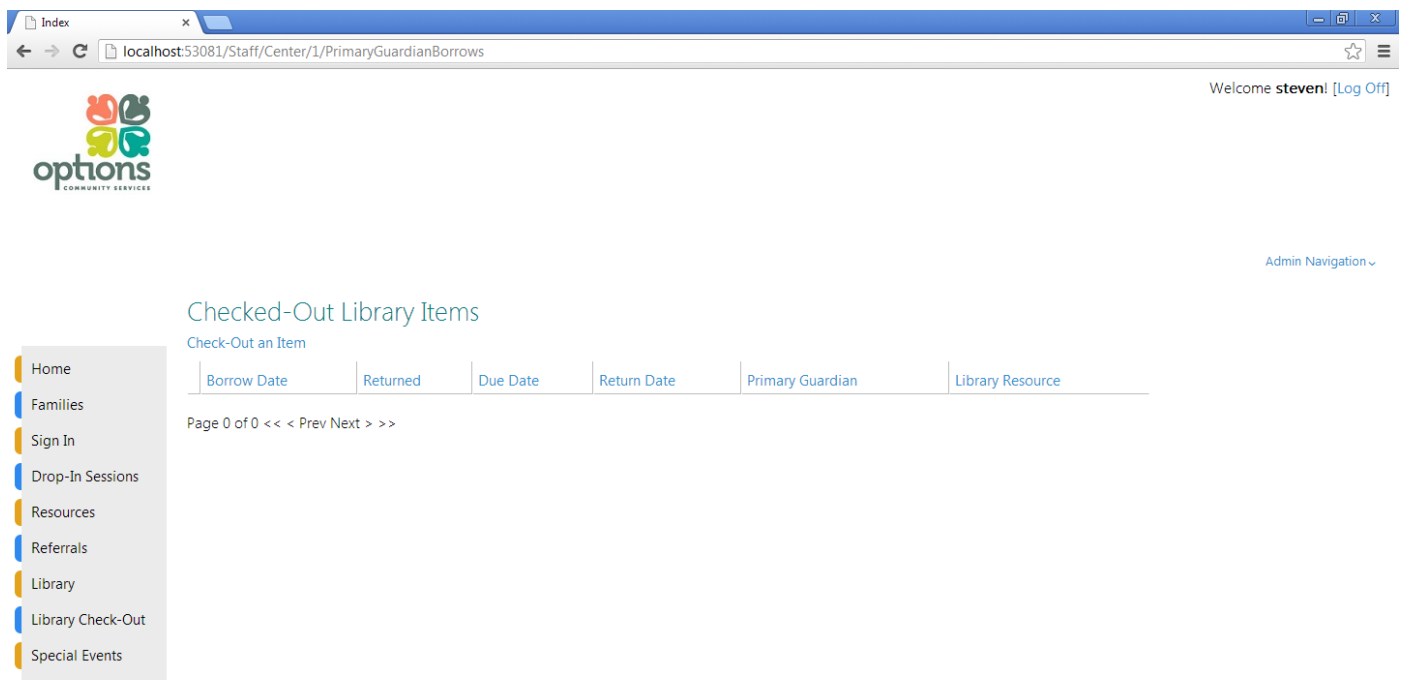
2. Click “Create a New Library Item”.
3. Enter all the information of the item you want to add.
4. Click the Create button.

3.3.2 Check-out an item

1. Click “Library Check-Out” tab on the navigation panel.



2. Click “Check-Out an Item”.




3. Pick the due date, primary guardian that is checking out the item, and the item that is going to be checked out. Then when you are finished, click the “Create” button

Create

localhost:53081/Staff/Center/1/PrimaryGuardianBorrows/Create

Welcome **steven!** [\[Log Off\]](#)



Admin Navigation ▾

Check-Out an Item

DueDate
2013-04-05

PrimaryGuardian
Ruby Heart

LibraryResource
Cars

Create

[Back to List](#)


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4. You have successfully checked out the item!

Index

localhost:53081/Staff/Center/1/PrimaryGuardianBorrows

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Admin Navigation ▾

Checked-Out Library Items

[Check-Out an Item](#)

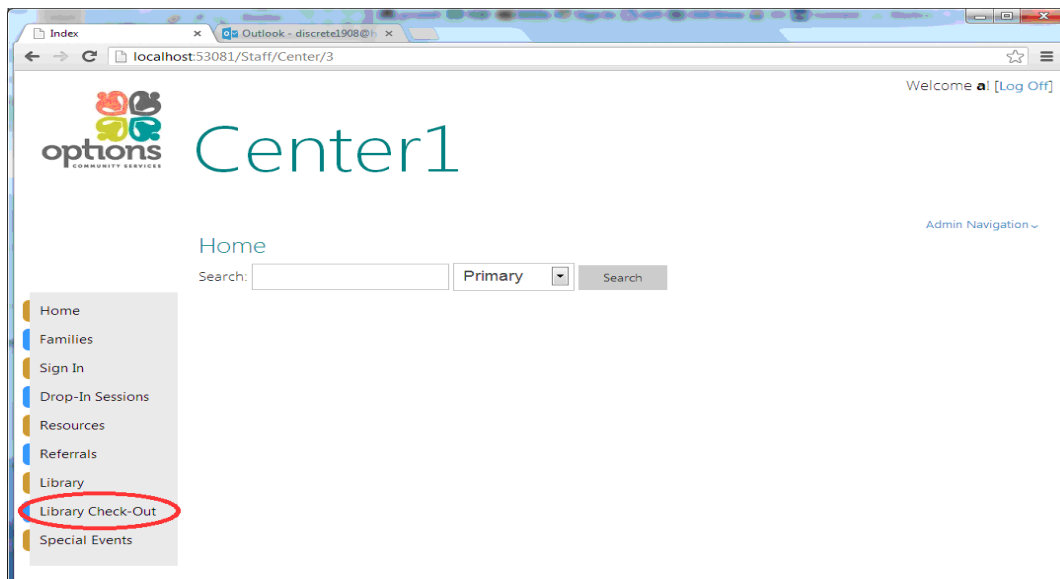
	Borrow Date	Returned	Due Date	Return Date	Primary Guardian	Library Resource
Check in Details	4/5/2013	False	4/5/2013		Ruby Heart	Cars

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3.3.3 Check-in an item

1. Click “Library Check-Out” tab on the navigation panel.




2. Click the “Check-in” link to check in the returned item

3. The system will automatically update the return date

Index

localhost:53081/Staff/Center/1/PrimaryGuardianBorrows

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Library Check-Out

Special Events

Checked-Out Library Items

Check-Out an Item

	Borrow Date	Returned	Due Date	Return Date	Primary Guardian	Library Resource
Check in Details	4/5/2013	True	4/5/2013	4/5/2013 2:59 AM	Ruby Heart	Cars

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