User Manual

Project Catawba Area Agency On Aging Database (CAAAD)

by

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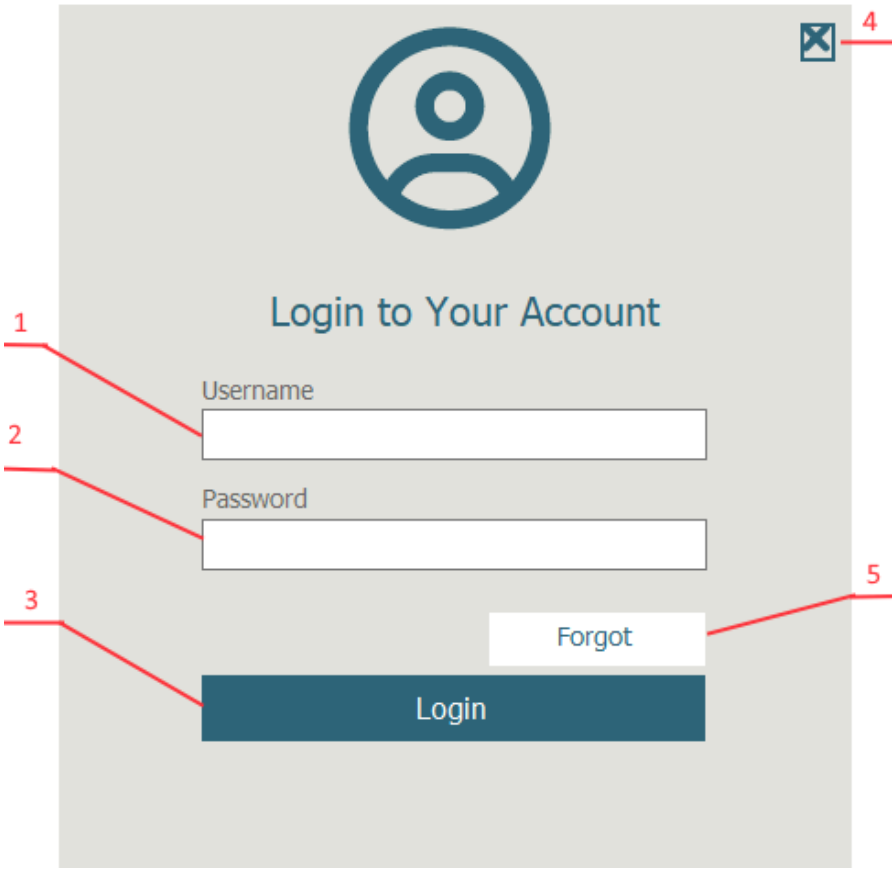
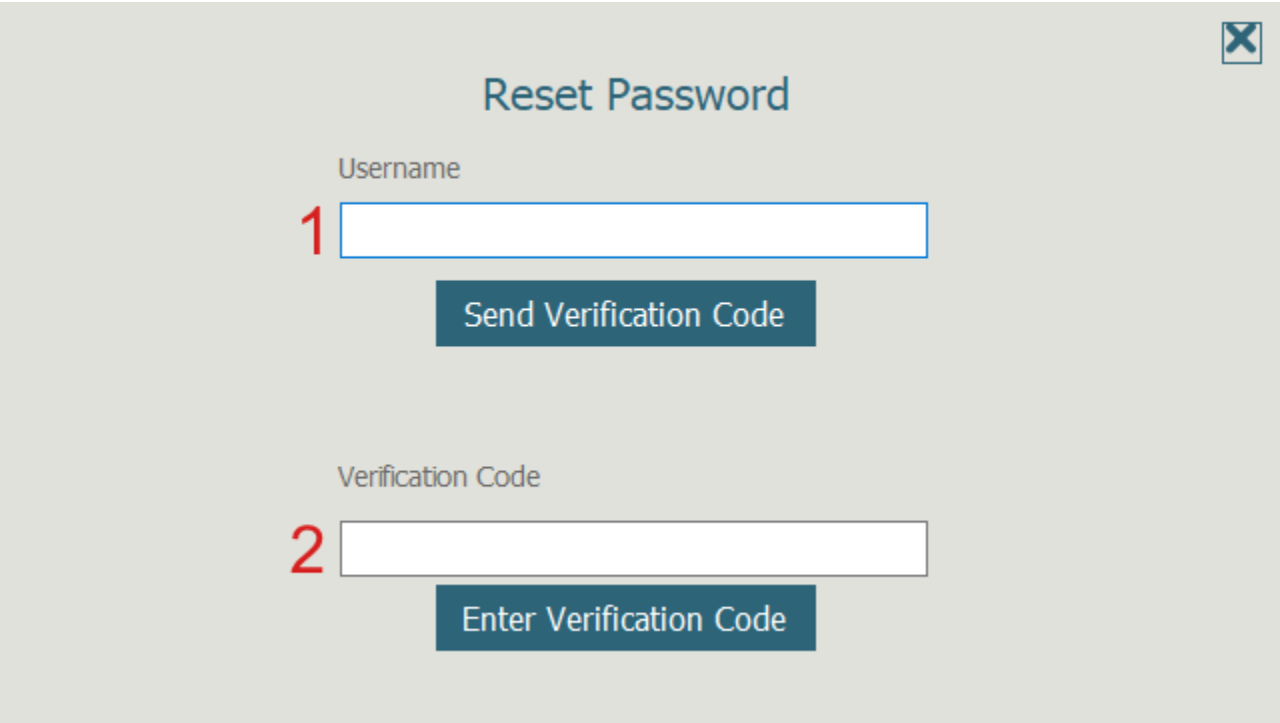
1. Login



On startup the program is on the Login to Your Account page where it asks the user for their login information. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter the username credentials into this box.
2. Enter the password to the user's account in this box.
3. Once the user's username and password are entered, click this box to proceed to the main menu.
4. Click this to exit the program.
5. Click this 'FORGOT' button if the user forgot their login credentials.

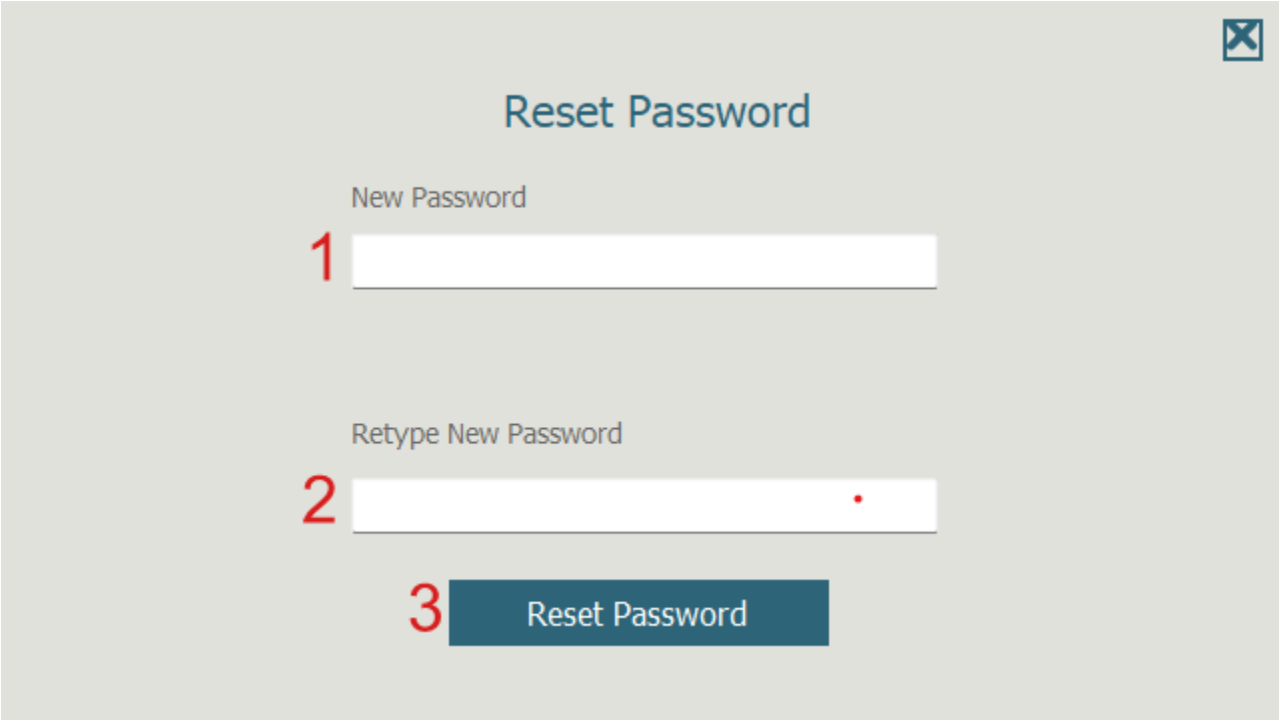
1a. Forgot Login



This is the Forgot Login page. If the user forgot their password the user will need to follow these steps in order to recover their account.

1. Type their Username then press the 'Send Verification Code' button so that a six character Verification Code is sent to the user's email address that was used to register into the user's account.
2. In the user's email there will be a six character Verification Code which may take time to be sent. Once the user has the Verification Code they should put the code in the Verification Code text box then press the 'Enter Verification Code' button.
    a. Once that is done the user is taken to the reset password page.

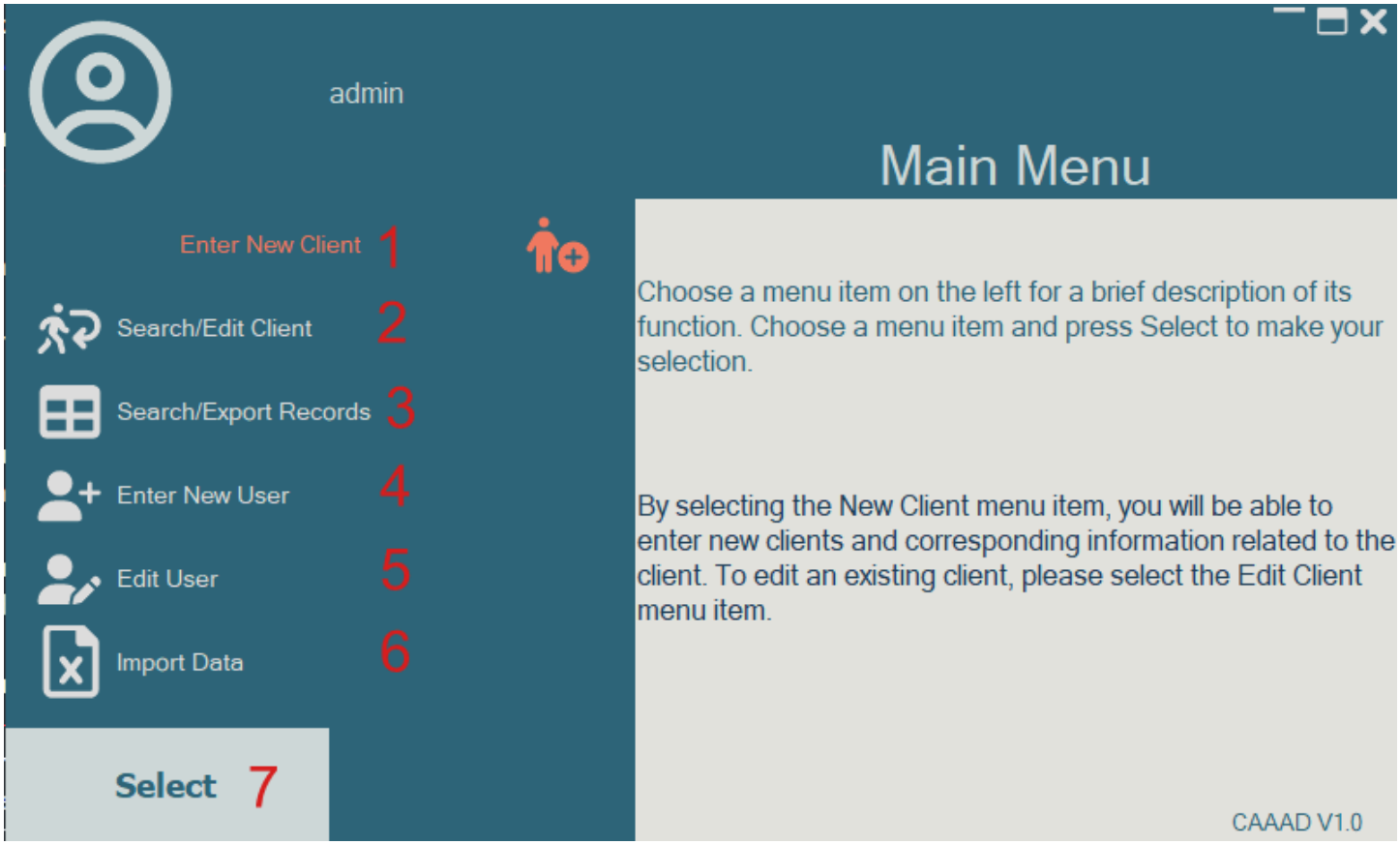
2a. Reset Password



This is the Reset Password page. The user types a new password; which must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Type their New Password.
2. Retype their New Password to confirm.
3. Click this 'Reset Password' to reset the user's password.

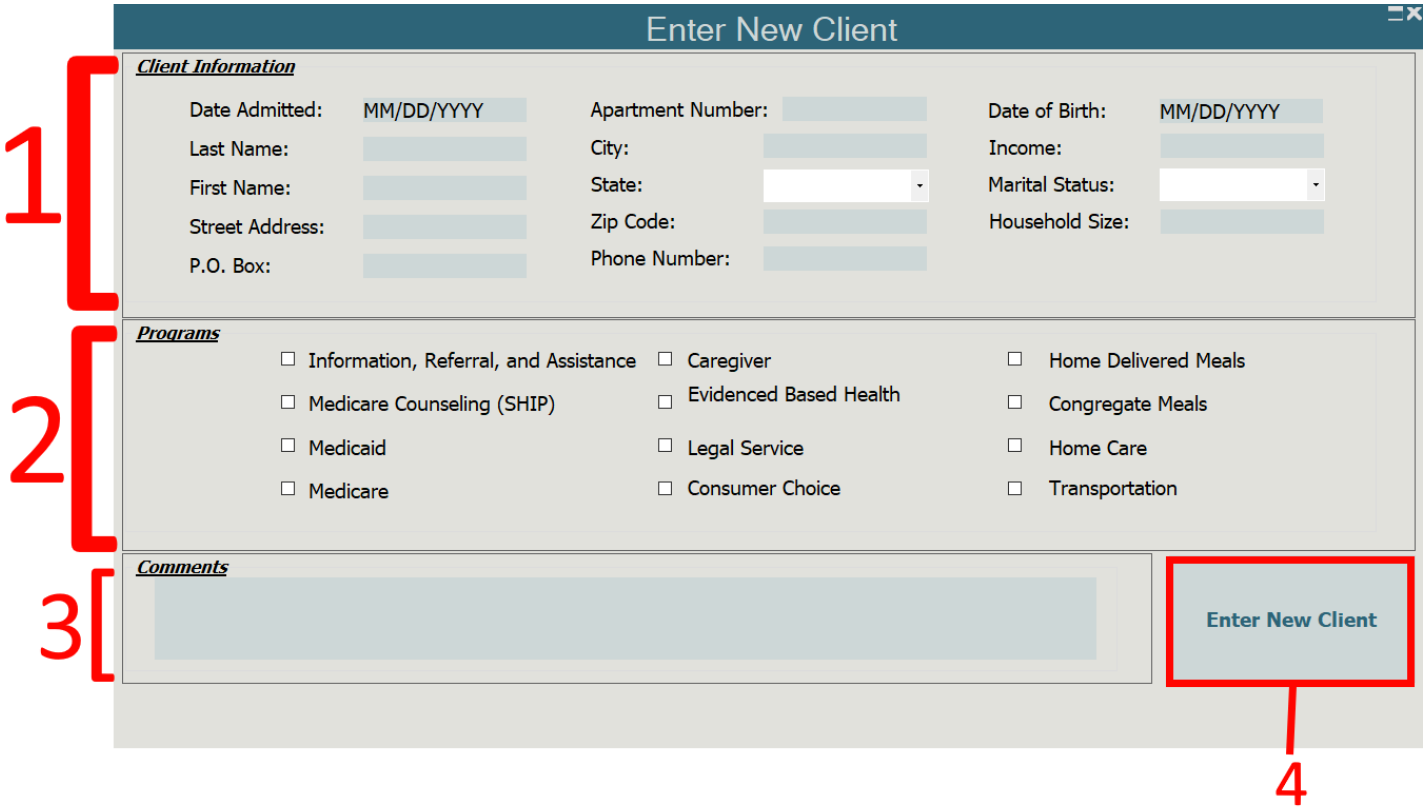
2. Main Menu



This is the main menu interface, the user can get to all other interfaces from here. Exiting out of other interfaces will bring the user back to this screen.

1. This will take the user to the enter new client interface.
2. This will take the user to the Search/Edit Client interface.
3. This will take the user to the Search/Export Records interface.
4. This will take the user to the Enter New User interface. * ADMIN ONLY *
5. This will take the user to the Edit User client interface. * ADMIN ONLY *
6. This will take the user to the Import Data client interface.
7. Press the SELECT button after clicking one of the above options to be taken to that interface.

3. Enter a New Client



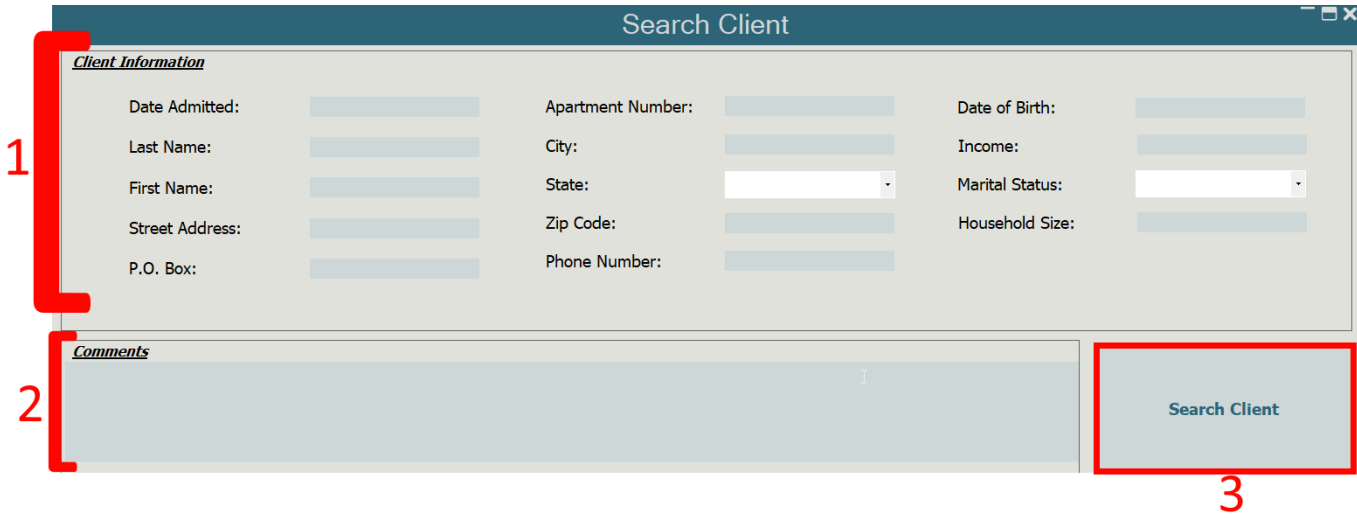
This is the Enter New Client interface. In this interface the user will enter the details of the client in the corresponding boxes. After filling out all applicable boxes press the Enter New Client button marked by a #4 to insert the new client information into the database.

NOTE: First Name, Last Name, and Date of Birth are required fields.

The user can make a new client by:

1. Type in client information to make a client such as their name, Phone Number, or Street Address.
2. Click each box corresponding to the programs the client is receiving.
3. The user can enter extra comments for the client in this box.

4. Search a Client

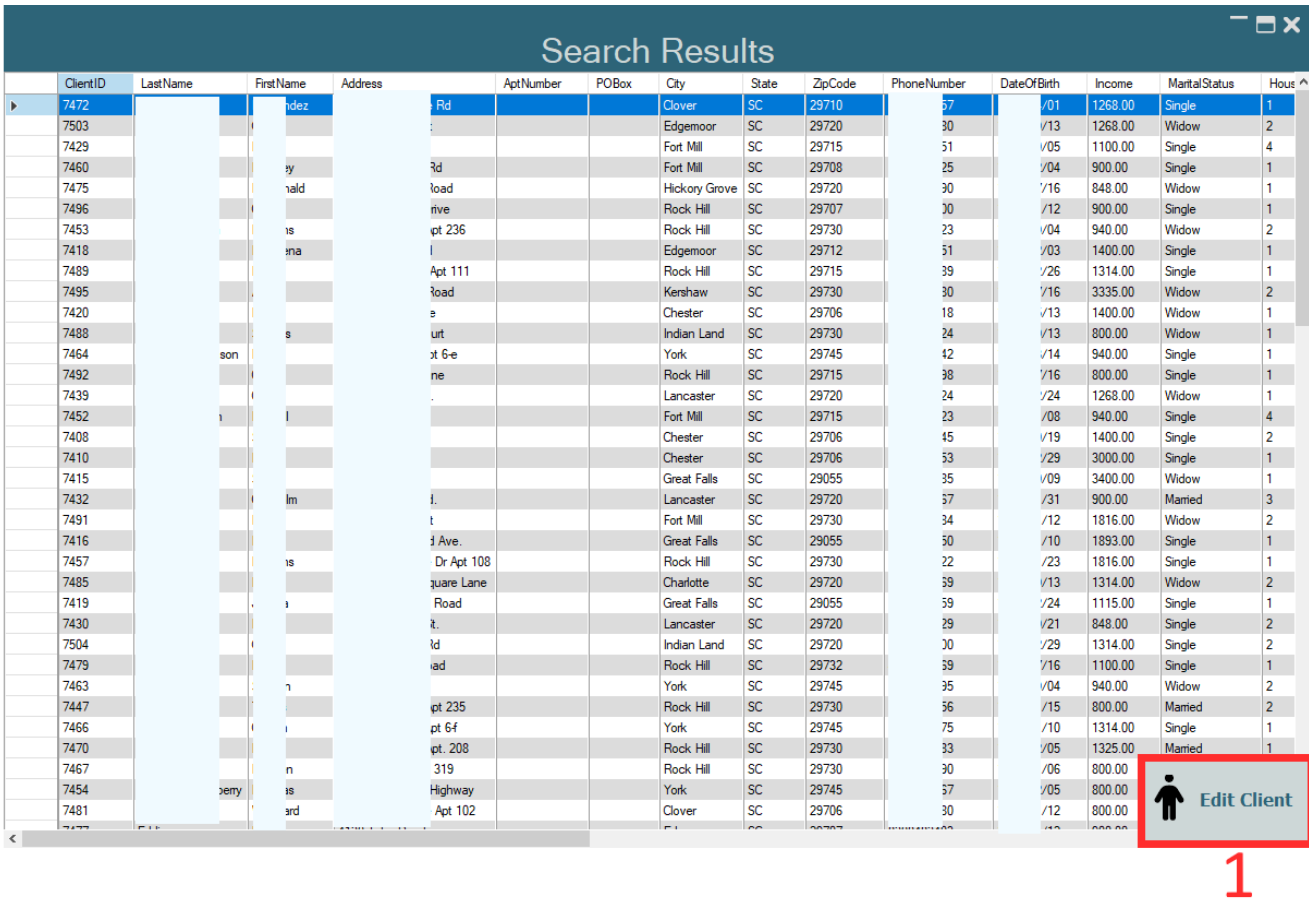


This is the Search Client interface. In this interface the user will enter the details of the client in the corresponding boxes. After filling out all applicable boxes press the 'Search Client' button marked by a #3 to find the client in the database

The user can search for individual clients on this page:

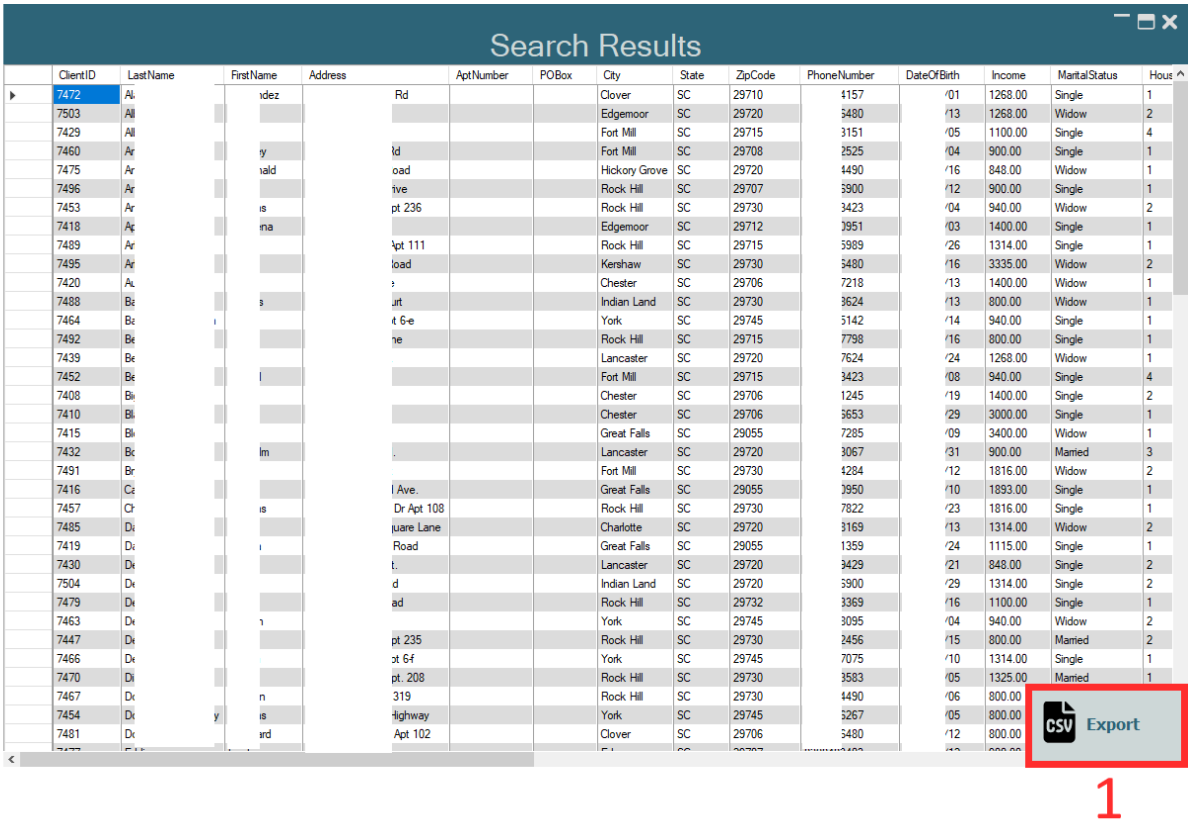
1. Type in client information in connection with the client.
2. Type in comments related to the client.
3. Press Search Client when done.

5. Edit a Client



The user can look up all the clients in the database. The user then can click on any client highlighted with the color blue and press the 1 button to ‘Edit Client’ button.

6. Exporting Files



ClientID	LastName	FirstName	Address	AptNumber	POBox	City	State	ZipCode	PhoneNumber	DateOfBirth	Income	MaritalStatus	Hous
7472	Al	ndez	Rd			Clover	SC	29710	4157	/01	1268.00	Single	1
7503	All					Edgemoor	SC	29720	5480	/13	1268.00	Widow	2
7429	All					Fort Mill	SC	29715	3151	/05	1100.00	Single	4
7460	Ar	y	Rd			Fort Mill	SC	29708	2525	/04	900.00	Single	1
7475	Ar	nald	oad			Hickory Grove	SC	29720	4490	/16	848.00	Widow	1
7496	Ar		rive			Rock Hill	SC	29707	5900	/12	900.00	Single	1
7453	Ar	is	pt 236			Rock Hill	SC	29730	3423	/04	940.00	Widow	2
7418	Ap	na				Edgemoor	SC	29712	0951	/03	1400.00	Single	1
7489	Ar		Apt 111			Rock Hill	SC	29715	5989	/26	1314.00	Single	1
7495	Ar		load			Kershaw	SC	29730	5480	/16	3335.00	Widow	2
7420	AL					Chester	SC	29706	7218	/13	1400.00	Widow	1
7488	Ba	s	urt			Indian Land	SC	29730	3624	/13	800.00	Widow	1
7464	Ba		t 6-e			York	SC	29745	5142	/14	940.00	Single	1
7492	Be		he			Rock Hill	SC	29715	7798	/16	800.00	Single	1
7439	Be					Lancaster	SC	29720	7624	/24	1268.00	Widow	1
7452	Be	l				Fort Mill	SC	29715	3423	/08	940.00	Single	4
7408	Bl					Chester	SC	29706	1245	/19	1400.00	Single	2
7410	Bl					Chester	SC	29706	5653	/29	3000.00	Single	1
7415	Bl					Great Falls	SC	29055	7285	/09	3400.00	Widow	1
7432	Bo	lm	.			Lancaster	SC	29720	3067	/31	900.00	Married	3
7491	Br					Fort Mill	SC	29730	4284	/12	1816.00	Widow	2
7416	Ca		l Ave.			Great Falls	SC	29055	0950	/10	1893.00	Single	1
7457	Ch	is	Dr Apt 108			Rock Hill	SC	29730	7822	/23	1816.00	Single	1
7485	Da		uare Lane			Charlotte	SC	29720	3169	/13	1314.00	Widow	2
7419	Da		Road			Great Falls	SC	29055	1359	/24	1115.00	Single	1
7430	De		t.			Lancaster	SC	29720	9429	/21	848.00	Single	2
7504	De		d			Indian Land	SC	29720	5900	/29	1314.00	Single	2
7479	De		ad			Rock Hill	SC	29732	3369	/16	1100.00	Single	1
7463	De	n				York	SC	29745	3095	/04	940.00	Widow	2
7447	De		pt 235			Rock Hill	SC	29730	2456	/15	800.00	Married	2
7466	De		pt 6-f			York	SC	29745	7075	/10	1314.00	Single	1
7470	Di		pt. 208			Rock Hill	SC	29730	3583	/05	1325.00	Married	1
7467	Do	n	319			Rock Hill	SC	29730	4490	/06	800.00		
7454	Do	y is	highway			York	SC	29745	5267	/05	800.00		
7481	Do	ard	Apt 102			Clover	SC	29706	5480	/12	800.00		

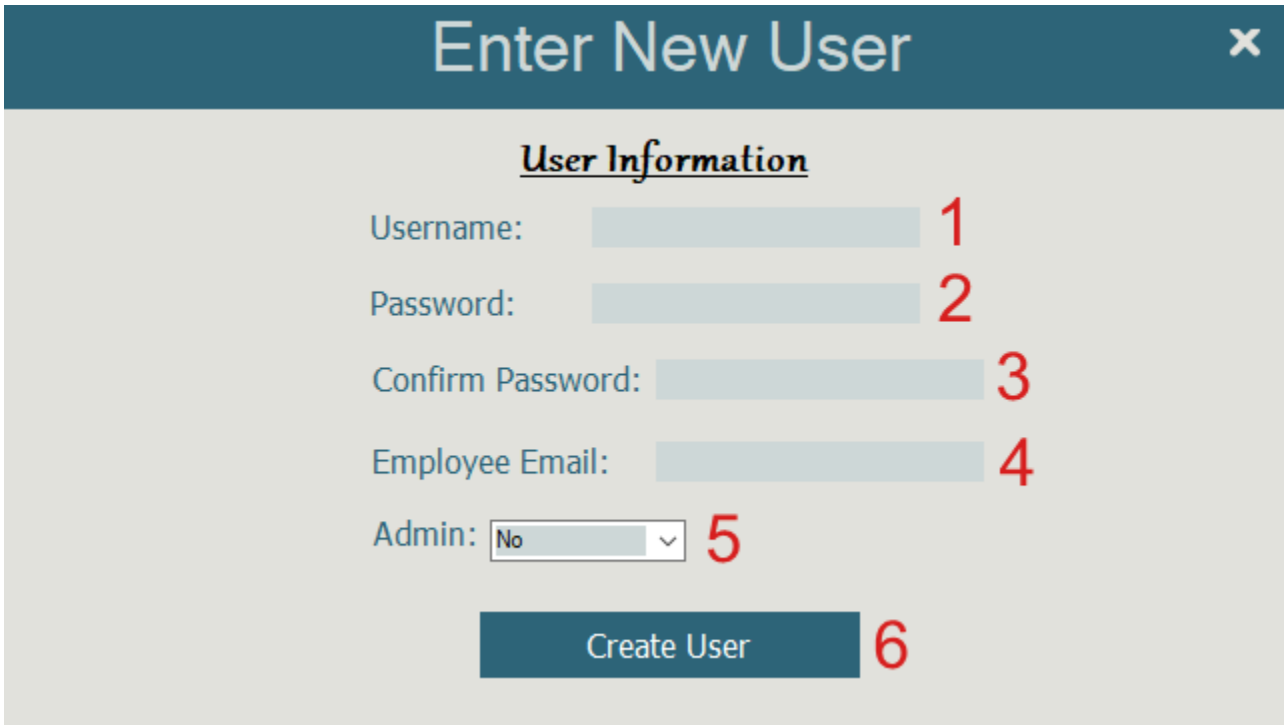
This interface allows the user to export the searched (see Search Client section) information into a .CSV file. When the user is satisfied with the data displayed, in the Results window, press the 'CSV Export' button denoted above with a red box to export. The user will be able to pick where to save this export.

7. Importing Files

The user can import CSV files from their computer. This is the Import interface. In this interface the user will enter the details and press buttons to import files. Press the Import button marked by a #4 for the system to import the files when steps are completed.

1. Browse into their desktop to find the CSV file to import.
2. This box will display the file path of the chosen CSV file.
3. This box will display all errors found during the import and what lines in the CSV file they can be found in.
4. Press 'Import' to import their file to the program.
5. Press 'Done' to exit the importing page.

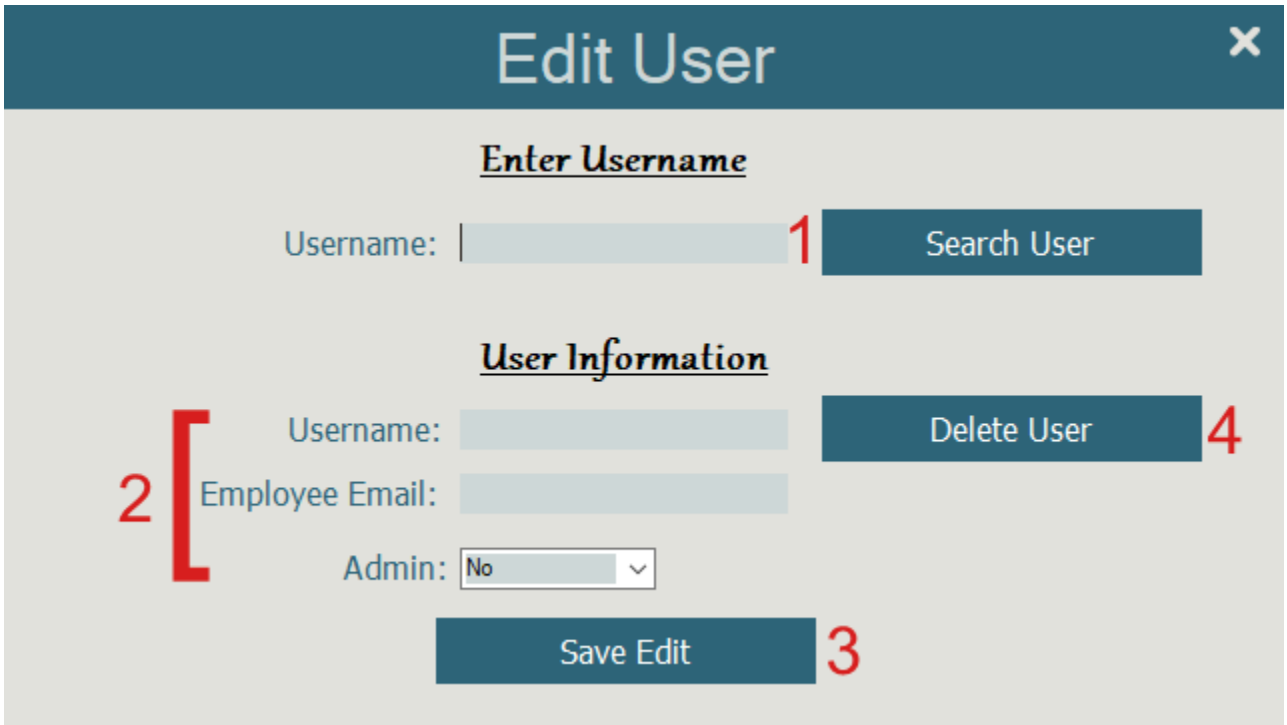
8. Enter New User *Admin Only*



This interface is for the creation of a new STAFF or ADMIN account. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter a Username for the newly created account.
2. Enter a Password for the newly created account.
3. Enter the same password as above to verify it has been typed correctly
4. Enter the email address that will be associated with the new account.
5. Select if the new account will be given ADMIN privileges or not.
6. Click ‘Create User’ to finish creation of the new user account.

9. Edit a User *Admin Only*



This interface is used to edit an existing USER or ADMIN account. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter the username of the associated account and click ‘Search User’.
2. If the account was found, the user can change the username, email, and ADMIN status associated with the account.
3. Click ‘Save Edit’ to save any changes made in this interface.
4. Click ‘Delete User’ in order to delete the account that was searched in #1.