EquineForLife

Powered by WebDev Strategies, LLC

USER

MANUAL

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Getting Started

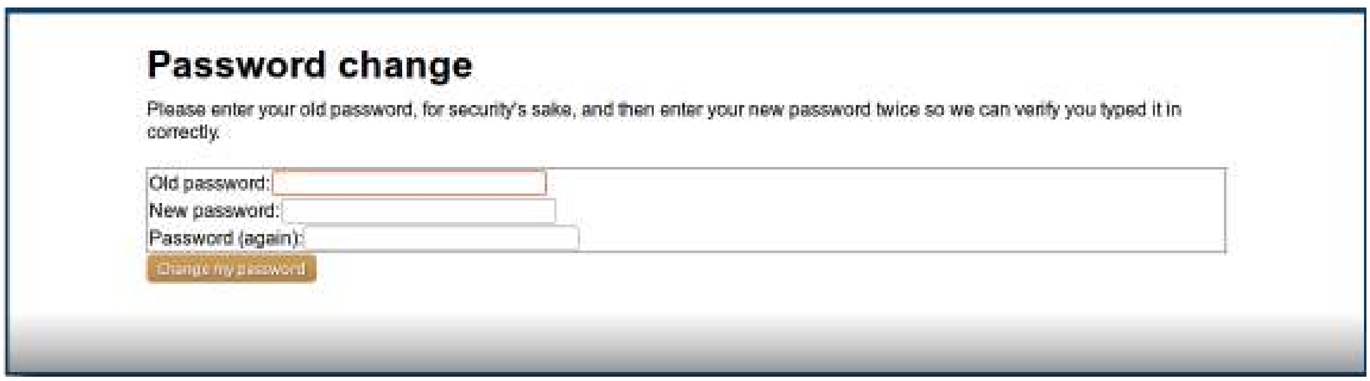
Welcome to Equine For Life! We are excited to provide you with a cutting edge data tracking service for your therapeutic horse-back riding program! We hope you enjoy this service and find it both user-friendly and efficient. If at any time you are unsatisfied with the system or have questions comments or suggestions, please contact admin@equineforlife.com. Because we are constantly working on new improvements and updates, including added features, we welcome all suggestions you might have on how to make the system better, more flexible and customized specifically for therapeutic riding programs!

If this is your first time logging in to Equine For Life, you will need to update your profile. You can do this by clicking on the "profile" tab on the top menu bar. When on the profile page, update the following information:

- Contact Name
- Phone Number
- Address
- Name of your organization
- Email address

Profile

The profile page is also where you will update and/or change your password. Remember, passwords should never be given out to other people and should not be written down or stored in locations where others could find them. Choose passwords that you can remember but cannot be easily guessed by others. A good example of a password is one the uses both alpha and numerical characters. To change your password, click on the "Change Password" button on the top left corner of the profile page. You will then be prompted to enter a new password. Equine For Life does not store user passwords. If you forget your password, click on the "reset password" button on the login screen. A message will be sent to the email address entered on your profile page with instructions on setting a new password.



On the profile page, you can also change your payment status. By click on "payments", you can subscribe or unsubscribe to automatic monthly payments.

Home

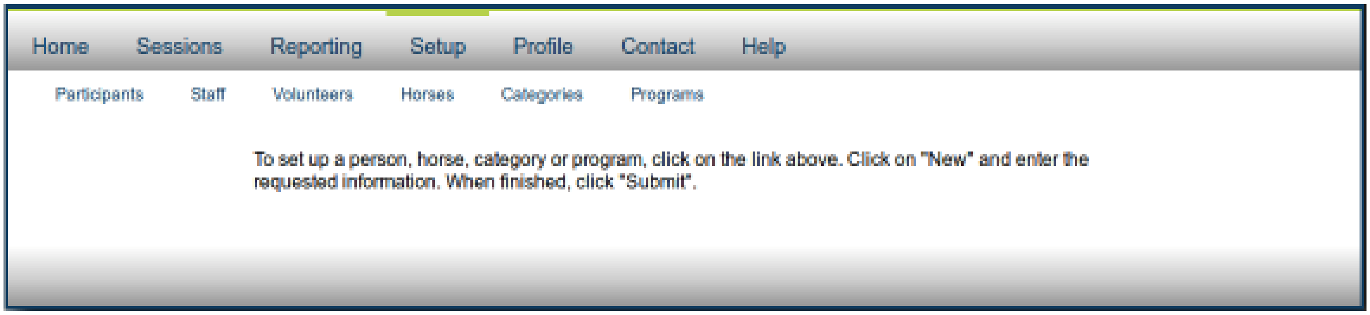
The home page is where you will automatically come to when first logging in to the program. The items shown on this page are informational and are designed to give you a quick glimpse or summary at a glance of your program.

30 Day Summary:
The pie charts show a summary of activity for the last 30 days. As you enter new information in the system, the 30 day summary will update to include your entries. Please note, these graphs are informational only and are not meant for reporting purposes.

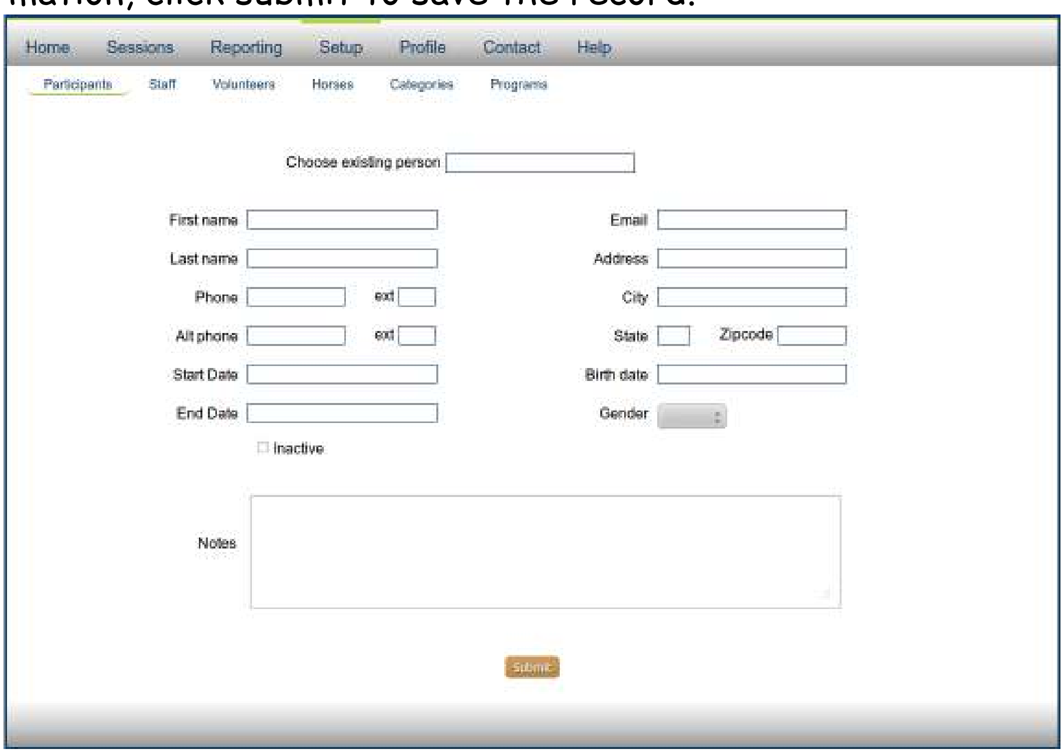
Announcements:
The announcement box will be used by the administrators of Equine For Life to post memos and updates for you. This is where we will notify you of any scheduled system down time for maintenance and updates, recent changes that you will notice, and any other information that we feel needs to be passed along to our members. Simply click on any of the messages to read its content.

Setup

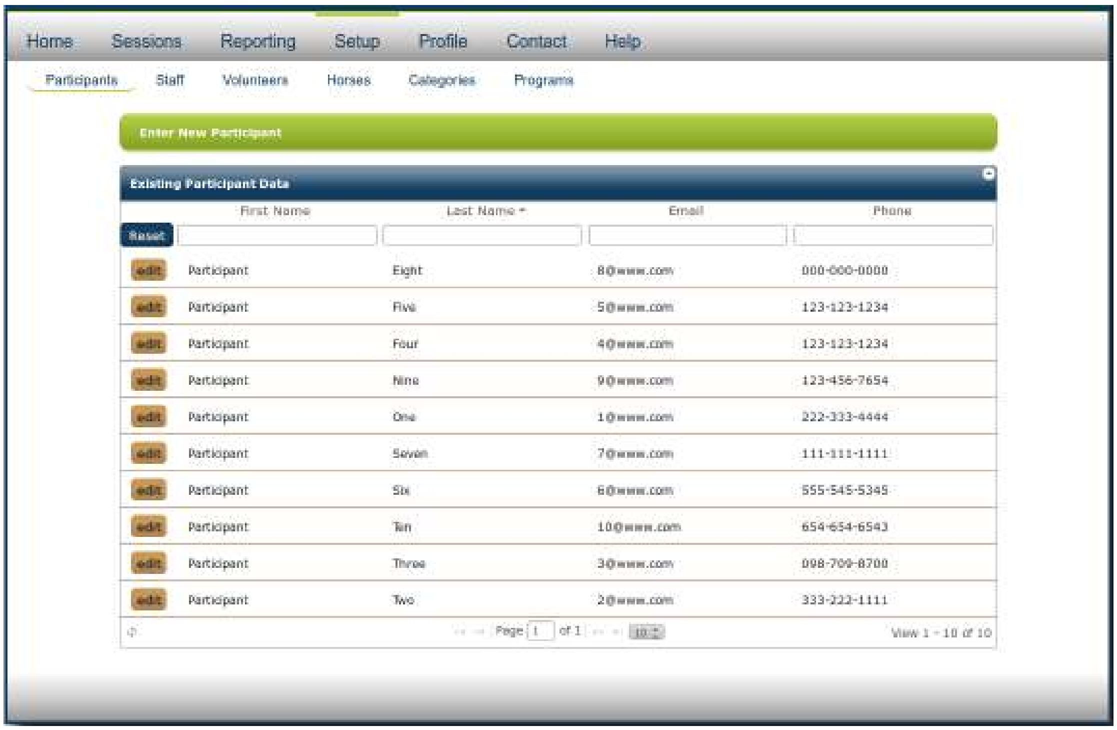
To setup participants, staff, volunteers, horses, categories and programs, click on the “setup” tab on the top menu bar.



Participants:
To enter a new participant, click on the “participants” tab and then “Enter New Participant”. You can then enter all of the information regarding the participant, including important notes. If the participant you are entering has already been entered in a different area, type their name in the “choose existing person” box to select their record. An example of this situation would be if someone is already set up as a volunteer for your program, but is now also enrolling as a participant rider. When you are finished entering all of the information, click submit to save the record.

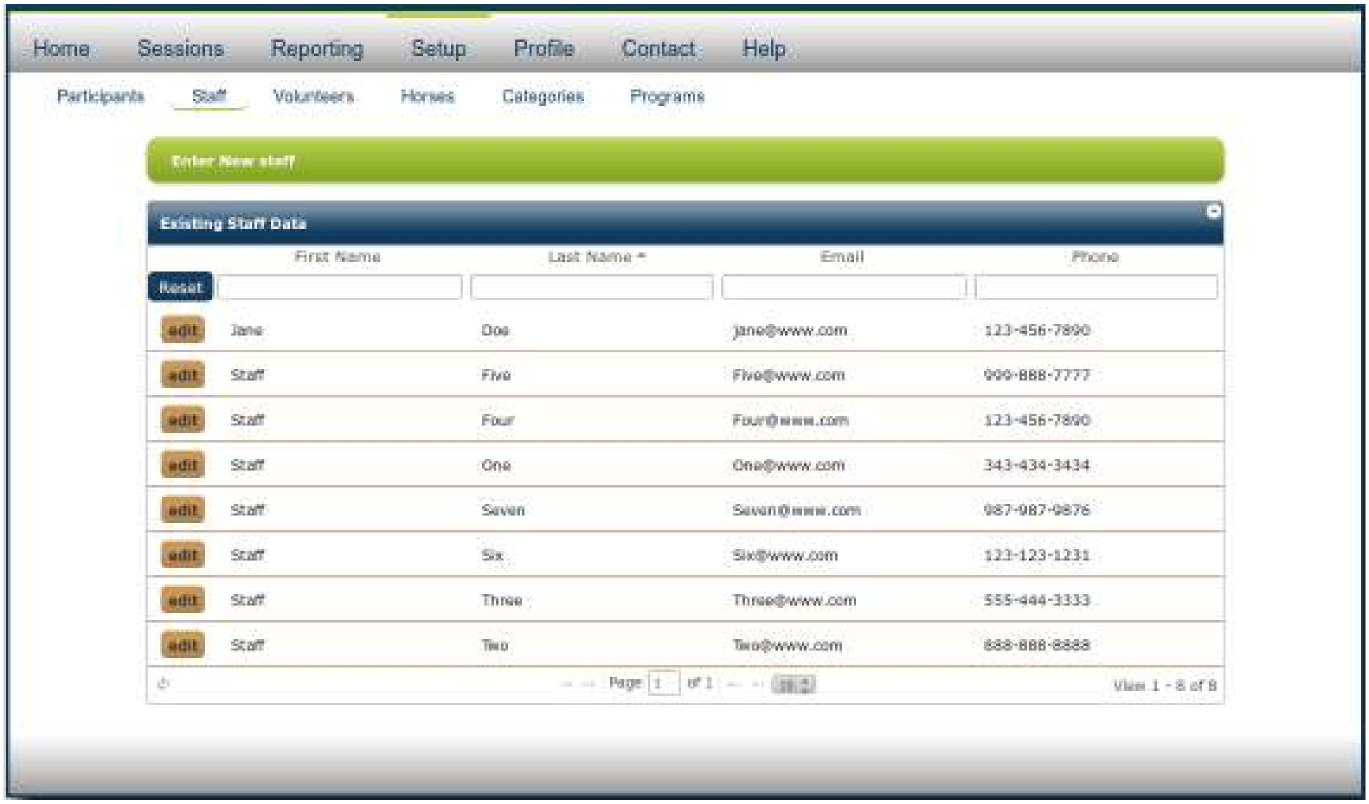


To edit an existing participant, enter the name in boxes provided. The list of participants will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a participant inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.



Staff:

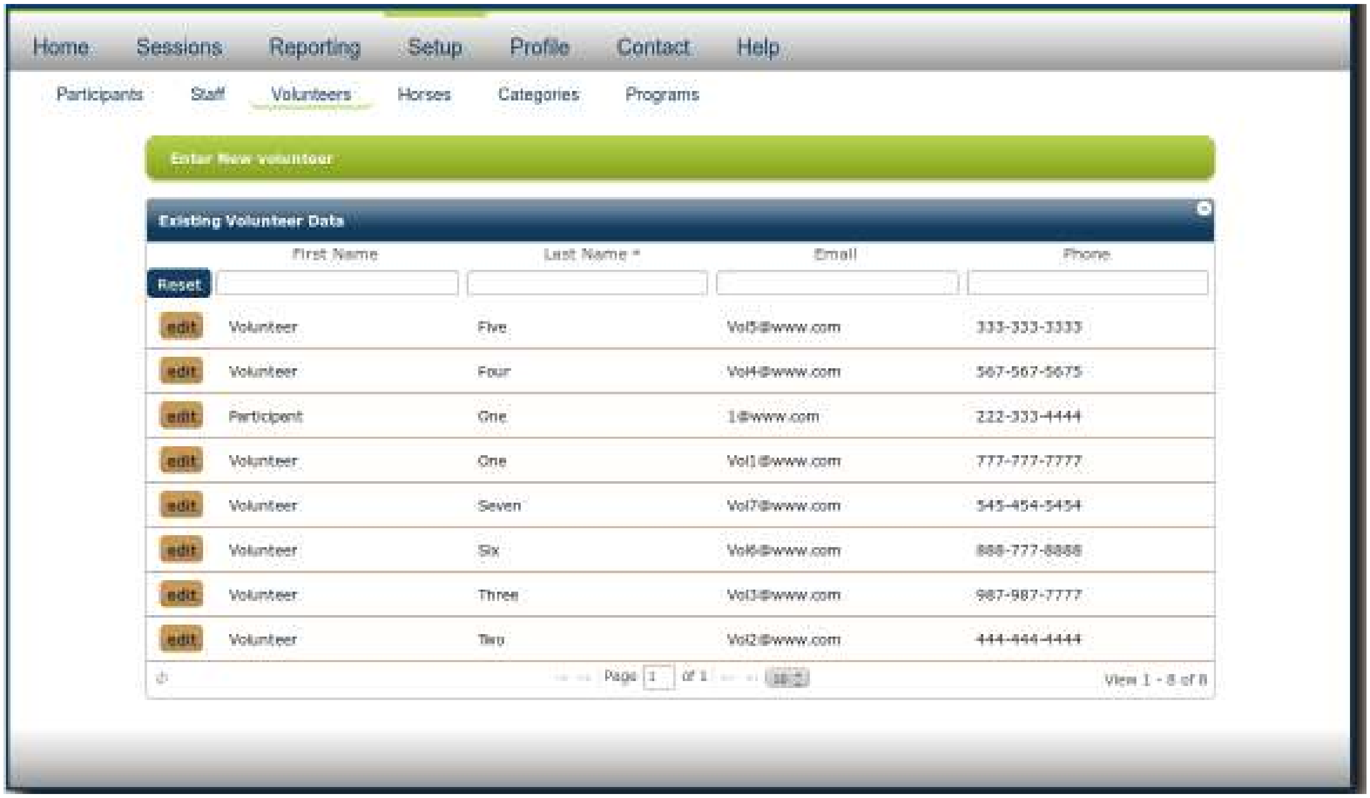
To enter a new staff member, click on the "staff" tab and then "Enter New staff". You can then enter all of the information regarding the staff member, including important notes. If the person you are entering has already been entered in a different area, type their name in the "choose existing person" box to select their record. An example of this situation would be if someone is already set up as a volunteer for your program, but has just been hired as a new staff member. When you are finished entering all of the information, click submit to save the record.



To edit existing staff member data, enter the name in boxes provided. The list of staff members will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a staff member inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

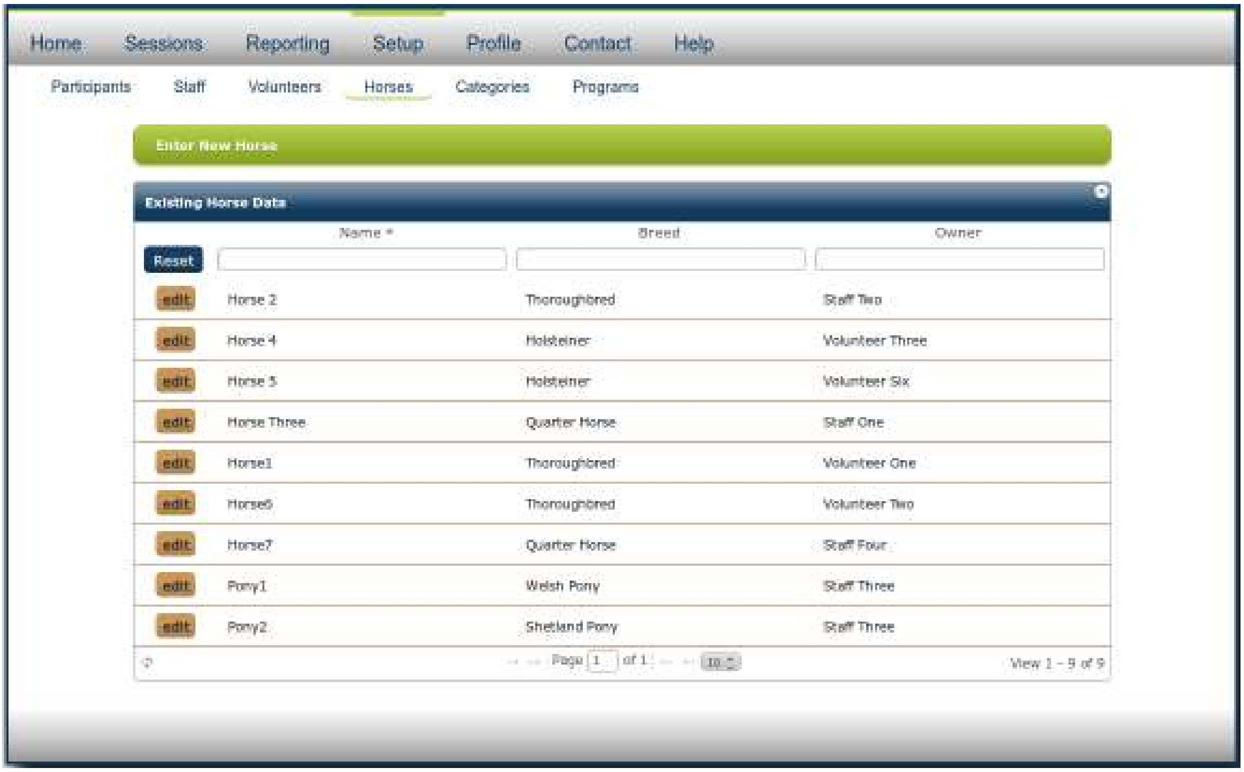
Volunteers:

To enter a new volunteer, click on the "volunteers" tab and then "Enter New volunteer". You can then enter all of the information regarding the volunteer, including important notes. If the person you are entering has already been entered in a different area, type their name in the "choose existing person" box to select their record. An example of this situation would be if someone is already set up as a participant for your program, but will also be volunteering. When you are finished entering all of the information, click submit to save the record.

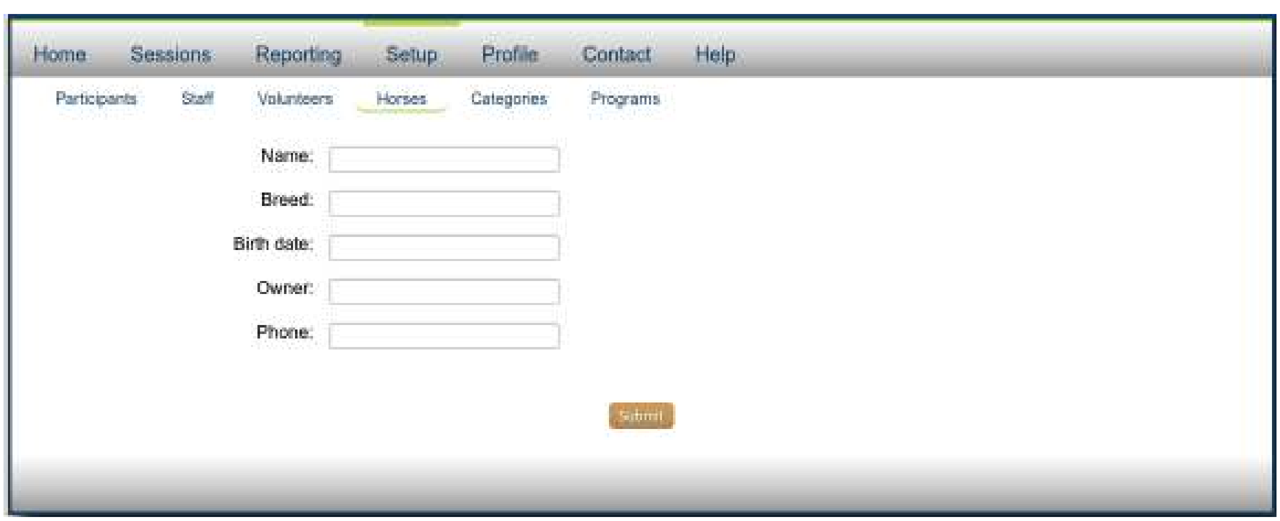


To edit existing volunteer data, enter the name in boxes provided. The list of volunteers will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a volunteer inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

Horses:
To enter a new horse, click on the "Horses" tab and then "Enter New Horse". You can then enter all of the information regarding the horse, including important notes. When you are finished entering all of the information, click submit to save the record.

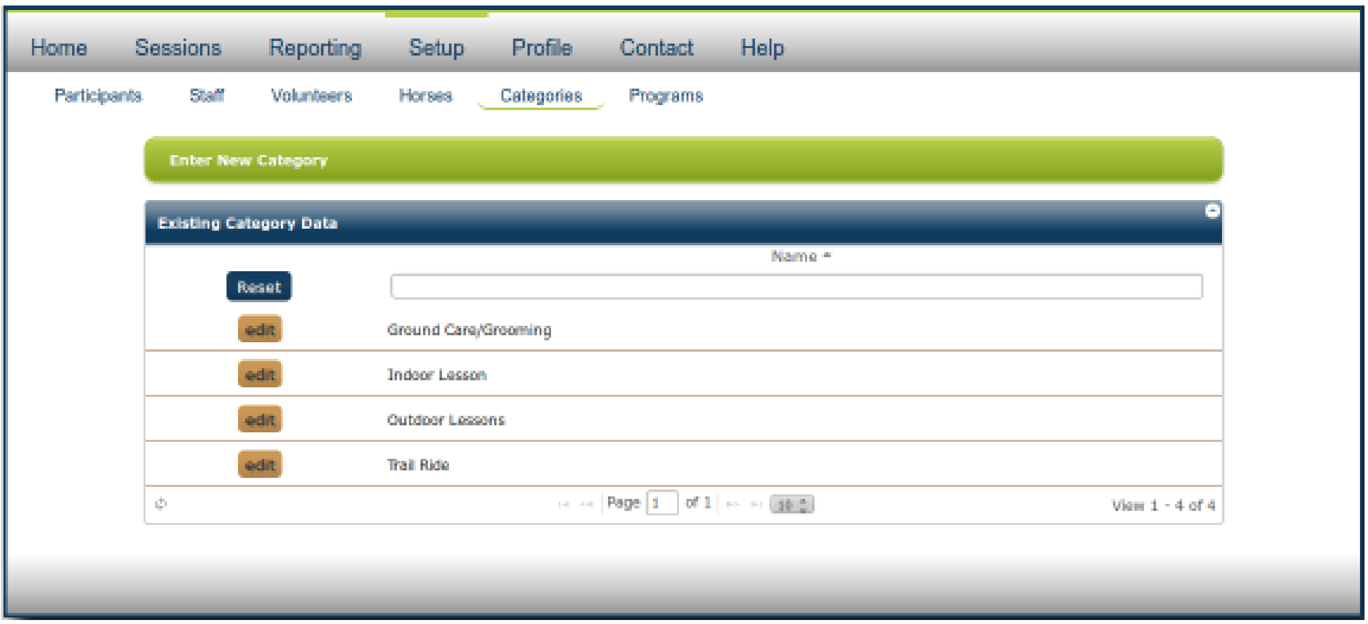


To edit existing horse data, enter the name in boxes provided. The list of horses will automatically filter to any entered with that name. Simply click on the "edit" button next to the horse you wish to edit. You may make a horse inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

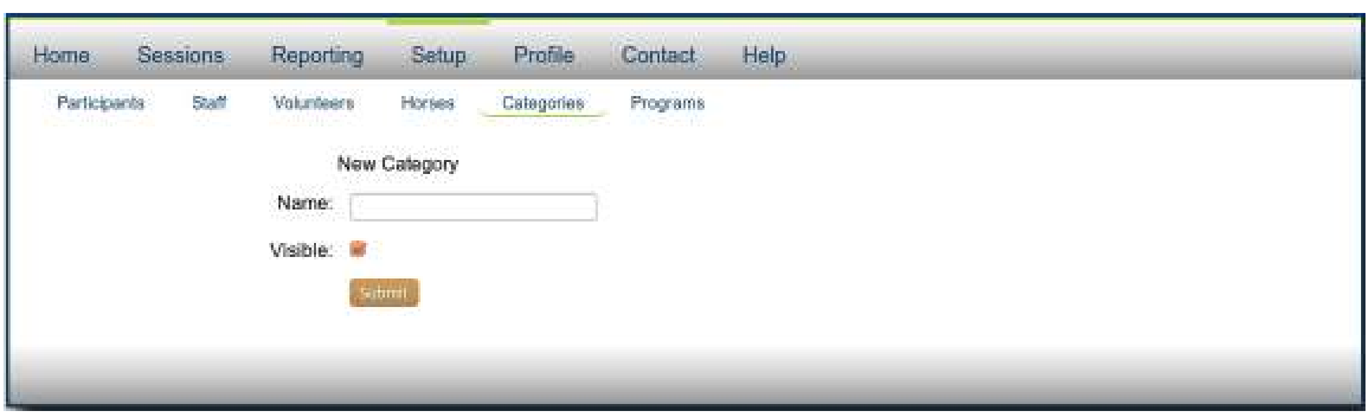


Categories:

To setup a new category, click on the "Categories" tab and then "Enter New Category". Enter the name of the category you wish to setup. When finished, click "submit" to save the record.



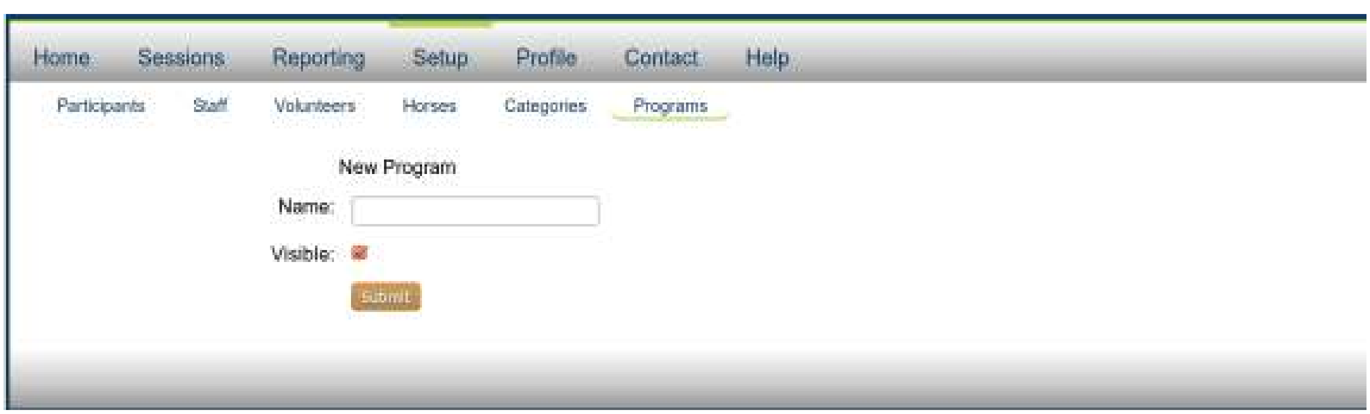
The edit an existing category, type the name in the box provided. The list of categories will automatically filter to any with the name you entered. Simply click on the "edit" button to the left of the category you wish to edit. You can then change the name of the category and choose whether it is visible or not. When finished, click "submit" to save the record.



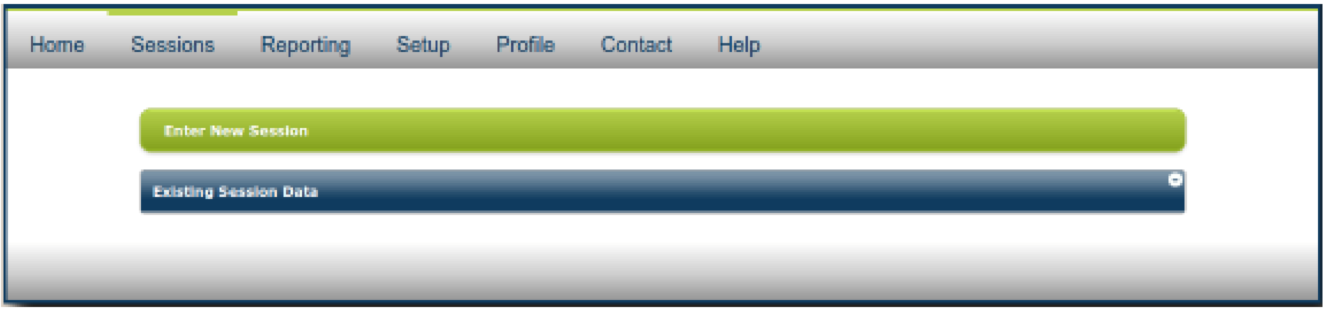
Programs:

To setup a new program, click on the "Programs" tab and then "Enter New Program". Enter the name of the program you wish to setup. When finished, click "submit" to save the record.

The edit an existing program, type the name in the box provided. The list of programs will automatically filter to any with the name you entered. Simply click on the "edit" button to the left of the program you wish to edit. You can then change the name of the program and choose whether it is visible or not. When finished, click "submit" to save the record.



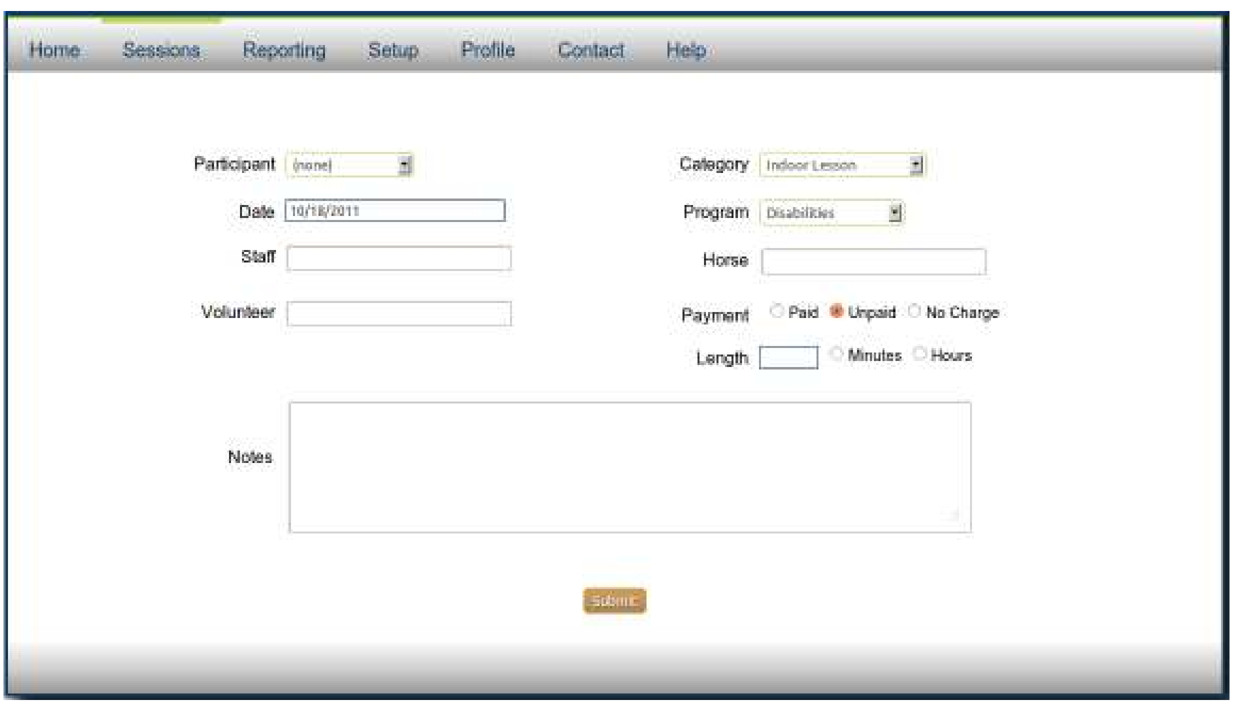
Sessions



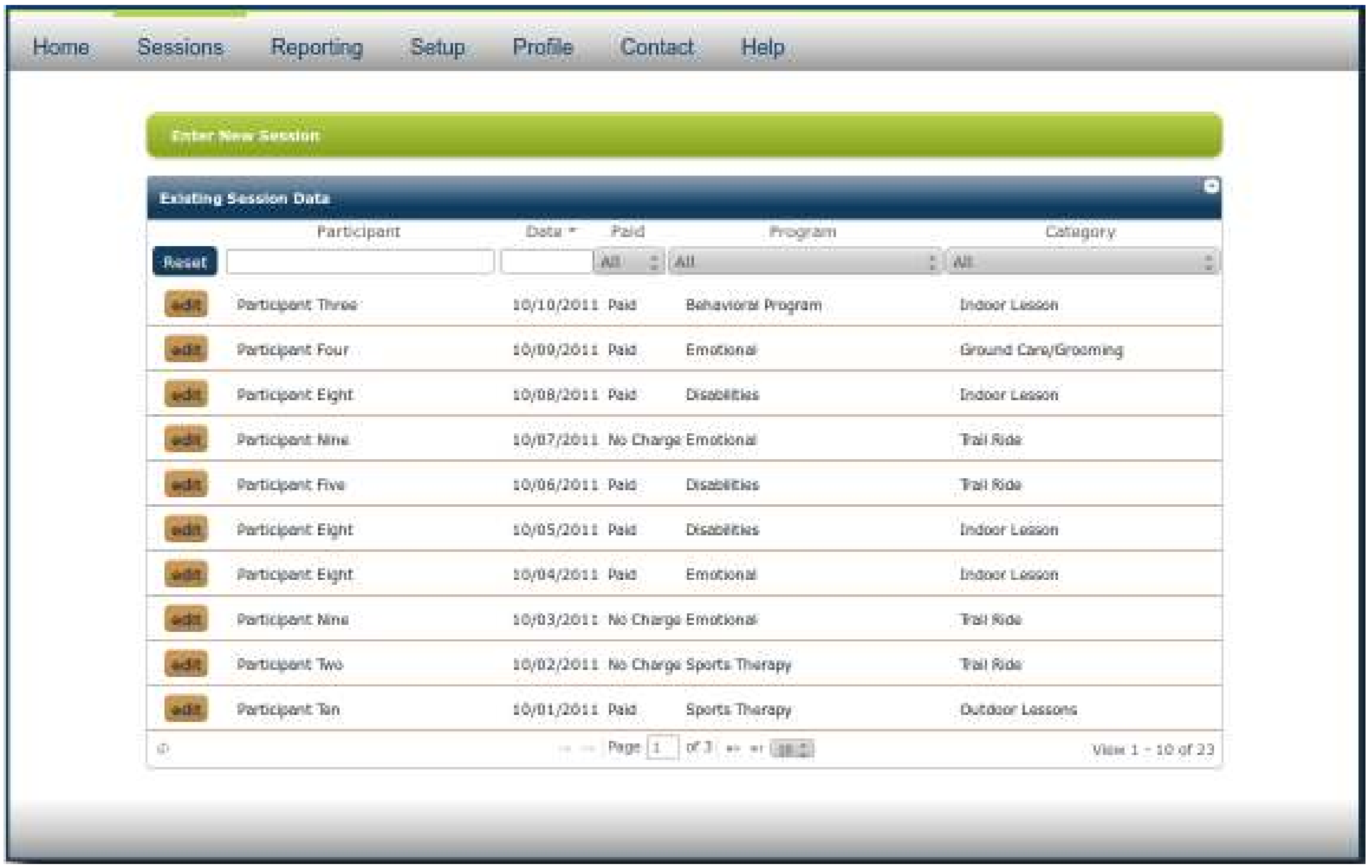
To enter session data, click on the "Sessions" tab on the top menu bar, then click on the "Enter New Session" button. Enter all relevant information.

- Choose the participant
- Enter the date of the session
- Enter the staff and volunteers (you may enter more than one of each)
- Choose the category and program
- Enter the horse (you may enter more than one horse)
- Select the payment status
- Enter the length of the session
- Type and comments in the notes box

When finished entering information about the session, click "submit" to save the record.

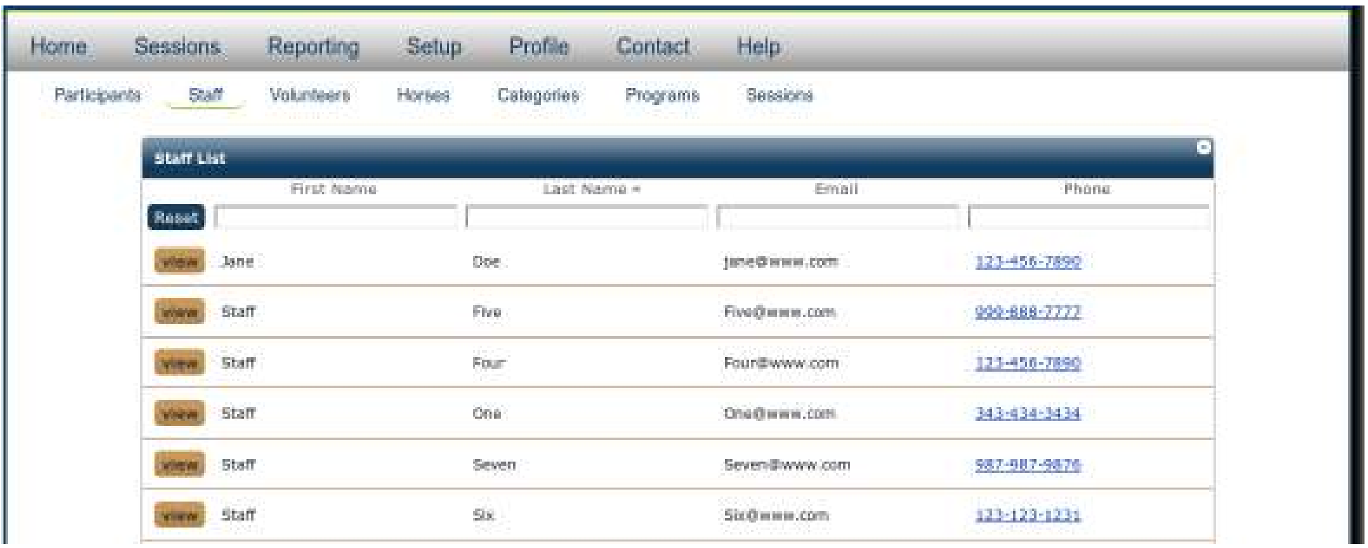


To edit information on an existing session, enter the participant name and date of the session in the boxes provided. The list of sessions will then automatically filter to that information. Click on the “edit” button next to the session you wish to change. You may then change any of the information entered for this session. When finished, click the “submit” button to save your changes.



Reporting

To create reports based on your entered data, click on the "Reporting" tab and choose the type of information you want (i.e. participants, staff, volunteers, horses, categories, programs or sessions.)

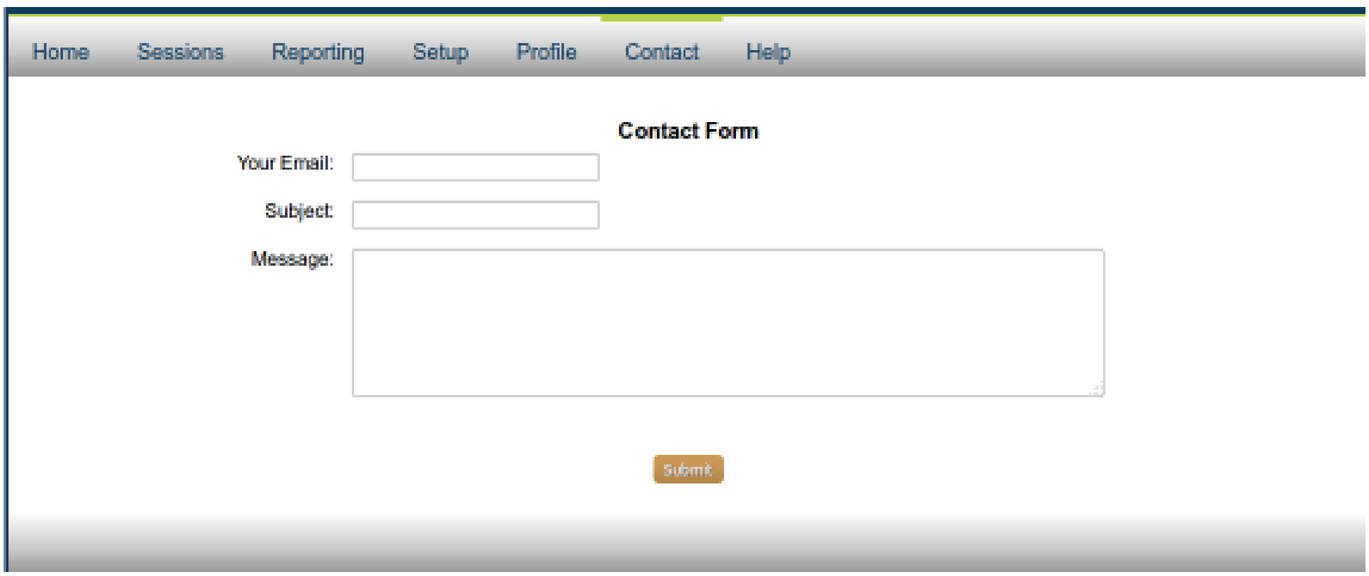


You can then filter the information to show only what you want. After you have entered a filter, click "submit" to view pie chart summaries. You can change the date range on this page to view data from a different timeframe by clicking "select date range" in the upper right corner.

To create a session report, click on the "sessions" sub-tab under reporting. Enter the filters that you would like to apply to your session data and click "search." Your list of session data will update to include only the sessions you requested via filters. To view or print this report, click on "printable version" in the upper right corner.

Contact

To submit questions, comments, suggestions, complaints, etc. to the administrators of Equine For Life, click on the "Contact" tab on the top menu bar. Your email address (as recorded on your profile) will automatically be entered in the email address box. Please enter a subject and then type your message in the message box. When finished, click the "submit" button to send it to Equine For Life administration. You may also always email admin@equineforlife.com. We will make every attempt to respond to all messages and emails with one business day.



Help

Use the "help" tab to look up answers to questions asked frequently by other users. We will continue to update this list of questions as they come. You will also find a copy of the user agreement and user manual on the help page. We encourage you to look up answers and directions on the frequently asked questions page as well as the user manual, but feel free to contact us at any time if you are unable to find the answers you need. We would be more than happy to help you at any time!