



EquineForLife

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USER MANUAL

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Getting Started

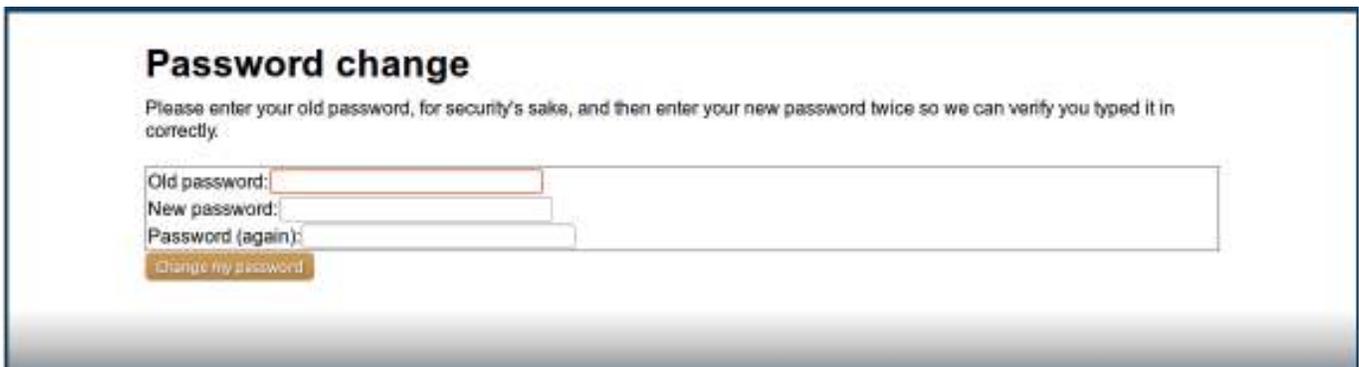
Welcome to Equine For Life! We are excited to provide you with a cutting edge data tracking service for your therapeutic horse-back riding program! We hope you enjoy this service and find it both user-friendly and efficient. If at any time you are unsatisfied with the system or have questions comments 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 that 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.



Password change

Please enter your old password, for security's sake, and then enter your new password twice so we can verify you typed it in correctly.

Old password:

New password:

Password (again):

[Change my password](#)

On the profile page, you can also change your payment status. By clicking 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:

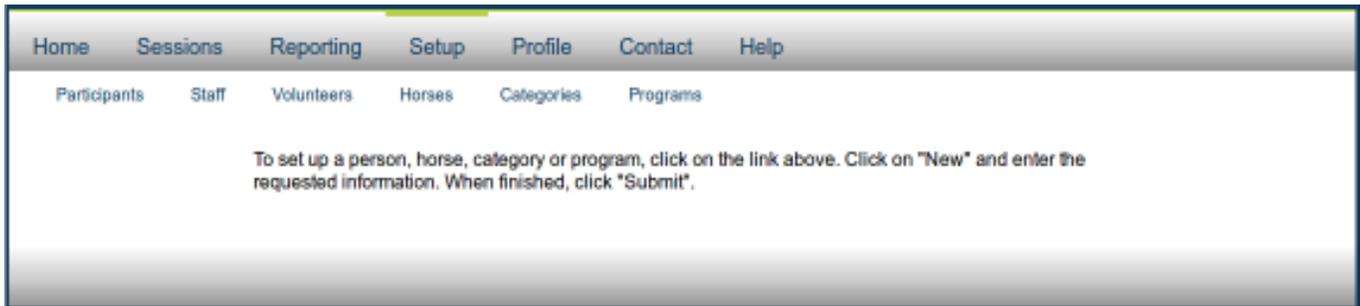
The pie charts show a summary of activity for the last 30 days. As you enter new information in the system, the 30 day summary will update to include your entries. Please note, these graphs are informational only and are not meant for reporting purposes.

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.

A screenshot of the 'Enter New Participant' form. The top navigation bar is the same as in the previous image, but the 'Participants' tab is highlighted with a green underline. The form contains the following fields and options:

- 'Choose existing person' text input field.
- Form fields for: First name, Last name, Phone, All phone, Start Date, End Date, Email, Address, City, State, Zipcode, Birth date, and Gender.
- An 'Inactive' checkbox.
- A large 'Notes' text area.
- A 'submit' button at the bottom center.

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.

The screenshot displays a web application interface for managing participants. At the top, there is a navigation menu with tabs: Home, Sessions, Reporting, Setup, Profile, Contact, and Help. Below this, a sub-menu is visible with tabs: Participants, Staff, Volunteers, Horses, Categories, and Programs. The main content area features a green button labeled "Enter New Participant". Below that is a section titled "Existing Participant Data" which contains a table with the following columns: First Name, Last Name, Email, and Phone. Each row in the table has an "edit" button to its left. The table contains 10 rows of data, with names ranging from "Participant Eight" to "Participant Two". At the bottom of the table, there is a pagination control showing "Page 1 of 1" and a "View 1 - 10 of 10" indicator.

	First Name	Last Name *	Email	Phone
<input type="button" value="edit"/>	Participant	Eight	8@www.com	000-000-0000
<input type="button" value="edit"/>	Participant	Five	5@www.com	123-123-1234
<input type="button" value="edit"/>	Participant	Four	4@www.com	123-123-1234
<input type="button" value="edit"/>	Participant	Nine	9@www.com	123-456-7654
<input type="button" value="edit"/>	Participant	One	1@www.com	222-333-4444
<input type="button" value="edit"/>	Participant	Seven	7@www.com	111-111-1111
<input type="button" value="edit"/>	Participant	Six	6@www.com	555-545-5345
<input type="button" value="edit"/>	Participant	Ten	10@www.com	654-654-6543
<input type="button" value="edit"/>	Participant	Three	3@www.com	098-709-8700
<input type="button" value="edit"/>	Participant	Two	2@www.com	333-222-1111

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.

Home Sessions Reporting Setup Profile Contact Help

Participants Staff Volunteers Horses Categories Programs

Enter New staff

Existing Staff Data

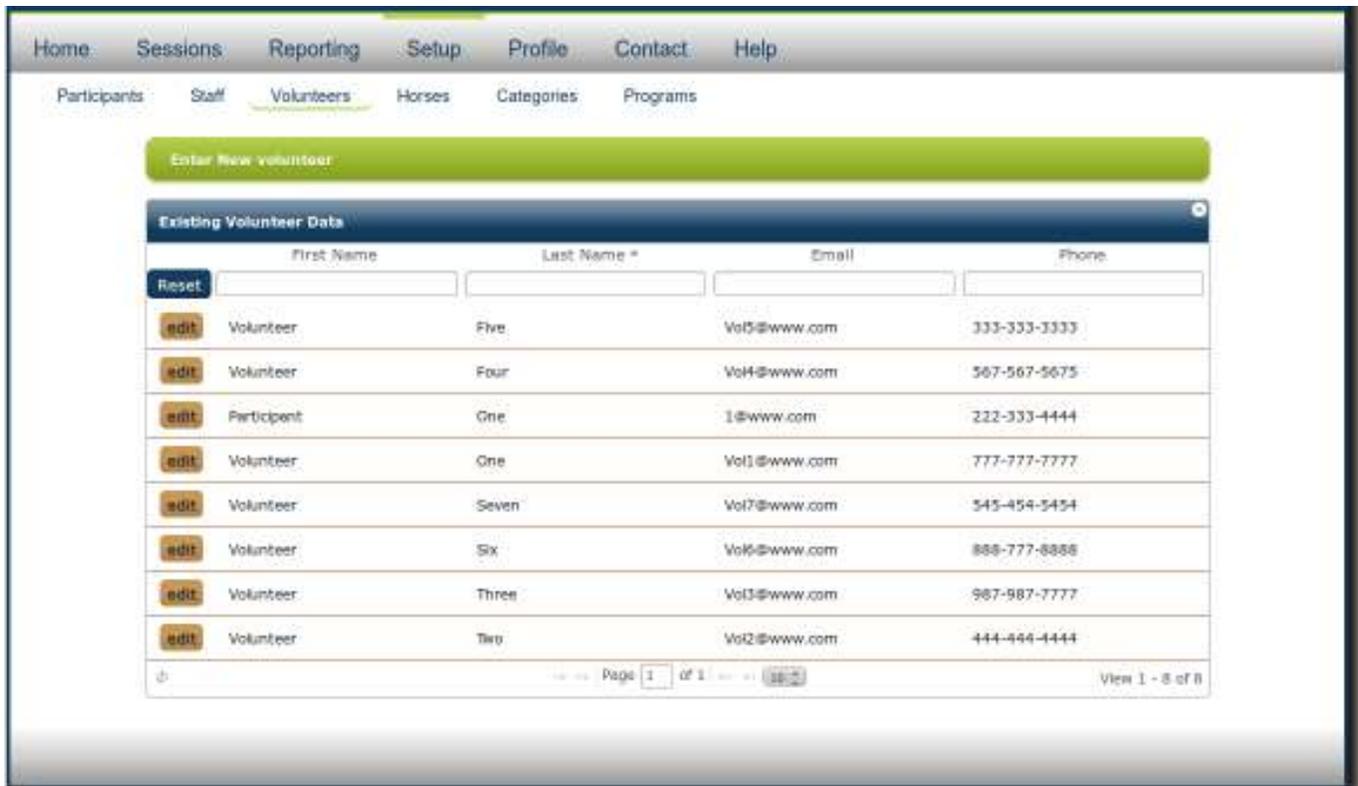
	First Name	Last Name *	Email	Phone
Reset	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
edit	Jane	Doe	jane@www.com	123-456-7890
edit	Staff	Five	Five@www.com	999-888-7777
edit	Staff	Four	Four@www.com	123-456-7890
edit	Staff	One	One@www.com	343-434-3434
edit	Staff	Seven	Seven@www.com	987-987-9876
edit	Staff	Six	Six@www.com	123-123-1231
edit	Staff	Three	Three@www.com	555-444-3333
edit	Staff	Two	Two@www.com	888-888-8888

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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.

Home Sessions Reporting Setup Profile Contact Help

Participants Staff Volunteers Horses Categories Programs

Enter New Horse

Existing Horse Data

	Name *	Breed	Owner
<input type="button" value="Reset"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="edit"/>	Horse 2	Thoroughbred	Staff Two
<input type="button" value="edit"/>	Horse 4	Holsteiner	Volunteer Three
<input type="button" value="edit"/>	Horse 5	Holsteiner	Volunteer Six
<input type="button" value="edit"/>	Horse Three	Quarter Horse	Staff One
<input type="button" value="edit"/>	Horse1	Thoroughbred	Volunteer One
<input type="button" value="edit"/>	Horse6	Thoroughbred	Volunteer Two
<input type="button" value="edit"/>	Horse7	Quarter Horse	Staff Four
<input type="button" value="edit"/>	Pony1	Welsh Pony	Staff Three
<input type="button" value="edit"/>	Pony2	Shetland Pony	Staff Three

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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.

Home Sessions Reporting Setup Profile Contact Help

Participants Staff Volunteers Horses Categories Programs

Name:

Breed:

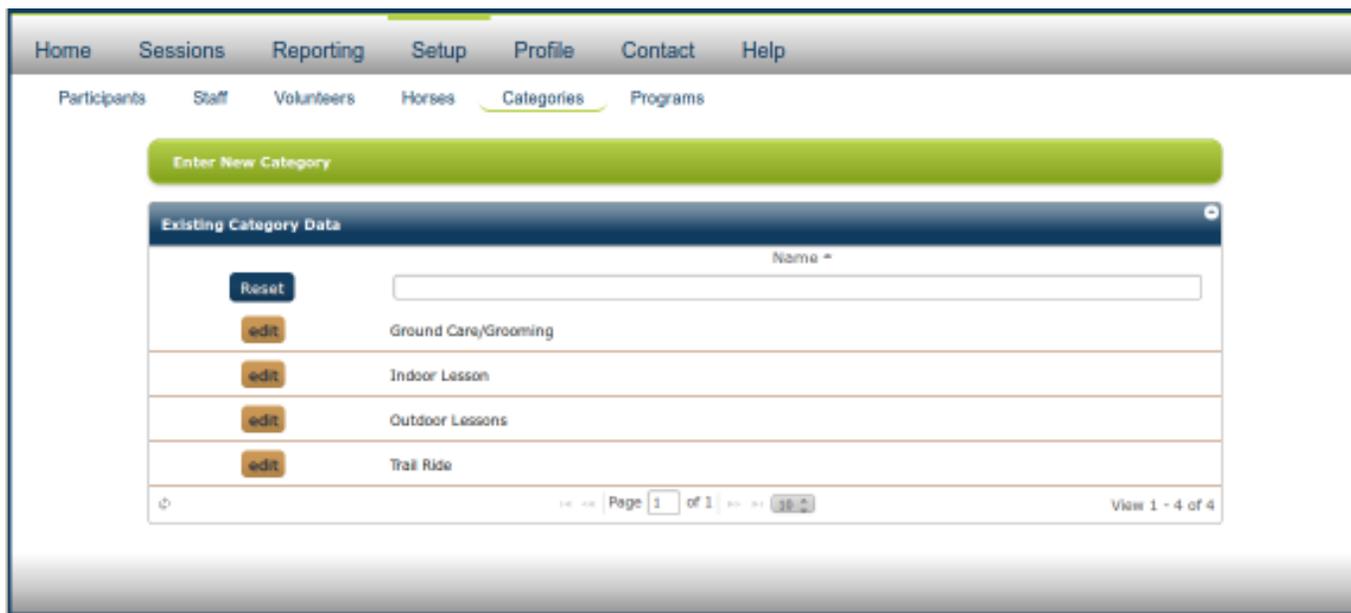
Birth date:

Owner:

Phone:

Categories:

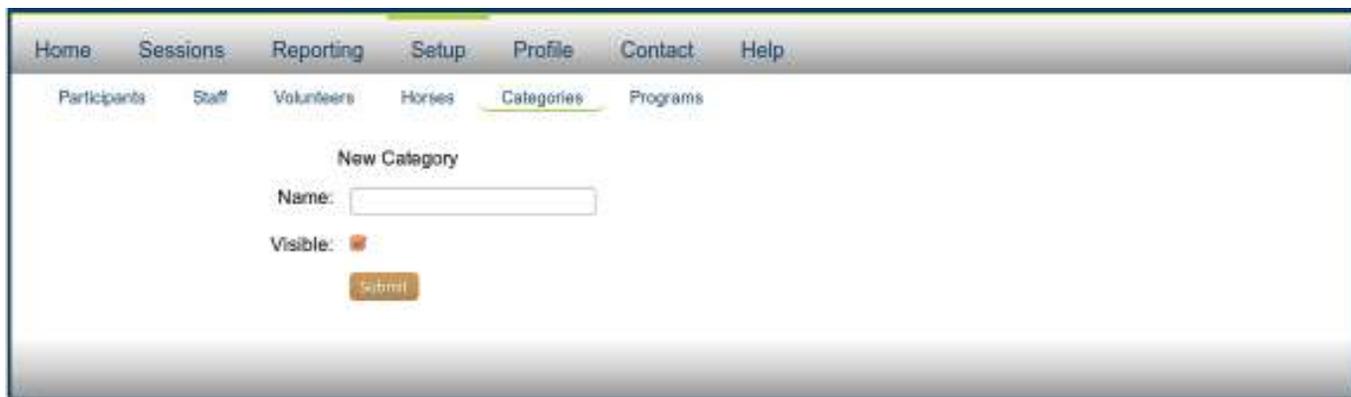
To setup a new category, click on the "Categories" tab and then "Enter New Category". Enter the name of the category you wish to setup. When finished, click "submit" to save the record.



The screenshot shows the 'Existing Category Data' table in the application. The table has a header row with a search box labeled 'Name' and a 'Reset' button. Below the header, there are four rows of category data, each with an 'edit' button to its left. The categories listed are 'Ground Care/Grooming', 'Indoor Lesson', 'Outdoor Lessons', and 'Trail Ride'. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a 'View 1 - 4 of 4' indicator.

Existing Category Data	
Name	
<input type="button" value="Reset"/>	<input type="text"/>
<input type="button" value="edit"/>	Ground Care/Grooming
<input type="button" value="edit"/>	Indoor Lesson
<input type="button" value="edit"/>	Outdoor Lessons
<input type="button" value="edit"/>	Trail Ride

To 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.



The screenshot shows the 'New Category' form in the application. It has a 'Name' field and a 'Visible' checkbox. The 'Visible' checkbox is currently checked. Below the form is a 'Submit' button.

New Category

Name:

Visible:

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 screenshot shows the 'Existing Program Data' table in the software interface. The table has a header row with a search box labeled 'Name' and a 'Reset' button. Below the header, there are five rows of program data, each with an 'edit' button to its left. The programs listed are Behavioral Program, Disabilities, Emotional, Riding Lessons, and Sports Therapy. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a 'View 1 - 5 of 5' indicator.

Existing Program Data	
Name	
<input type="button" value="Reset"/>	<input type="text"/>
<input type="button" value="edit"/>	Behavioral Program
<input type="button" value="edit"/>	Disabilities
<input type="button" value="edit"/>	Emotional
<input type="button" value="edit"/>	Riding Lessons
<input type="button" value="edit"/>	Sports Therapy

To 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.

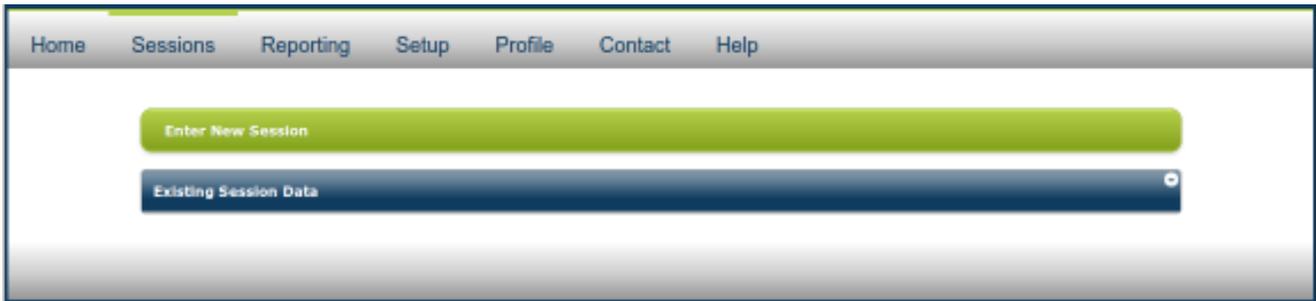
The screenshot shows the 'New Program' form in the software interface. It has a header row with navigation tabs: Home, Sessions, Reporting, Setup, Profile, Contact, and Help. Below the header, there are sub-tabs: Participants, Staff, Volunteers, Horses, Categories, and Programs. The 'New Program' form has a 'Name' field, a 'Visible' checkbox, and a 'Submit' button.

New Program

Name:

Visible:

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.

A screenshot of the "Enter New Session" form. The form is displayed on a page with the same navigation bar as the previous image. The form fields include: a dropdown menu for "Participant" (currently set to "(none)"), a date input field for "Date" (set to "10/18/2011"), a text input field for "Staff", a text input field for "Volunteer", a dropdown menu for "Category" (set to "Indoor Lesson"), a dropdown menu for "Program" (set to "Disabilities"), a text input field for "Horse", a radio button group for "Payment" (with "Unpaid" selected), and a radio button group for "Length" (with "Minutes" selected). There is also a large text area for "Notes" and a "Submit" button at the bottom center.

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.

The screenshot shows a web application interface with a navigation menu at the top: Home, Sessions, Reporting, Setup, Profile, Contact, Help. Below the menu is a green button labeled "Enter New Session". Underneath is a section titled "Existing Session Data" which contains a table with filters and a list of sessions.

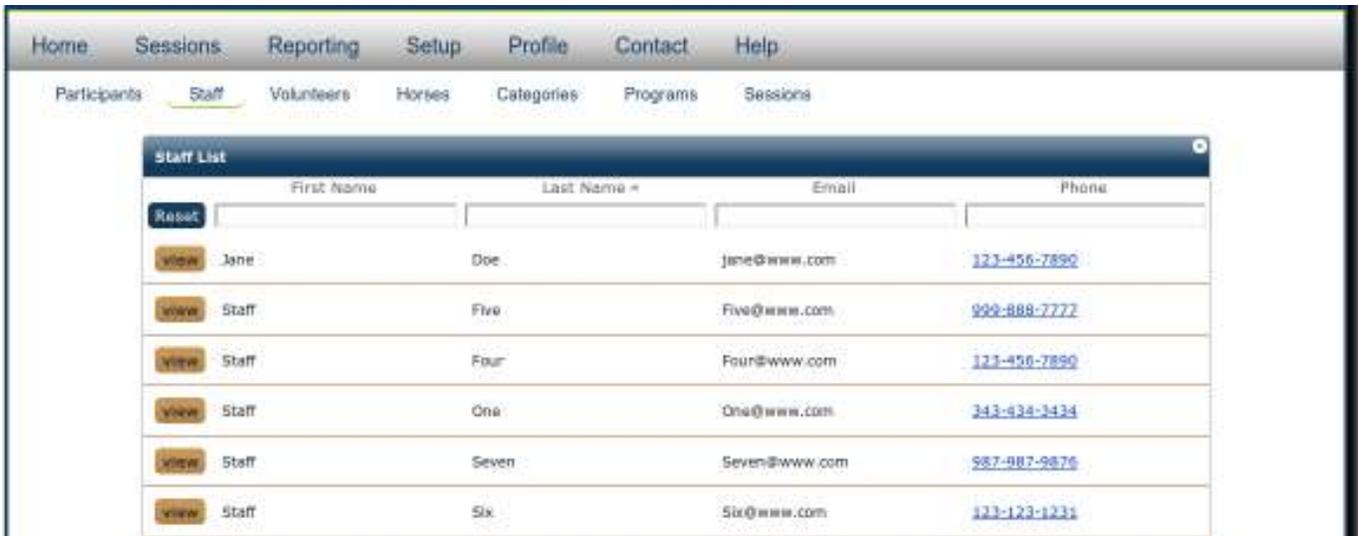
Filters: **Reset** [Participant] [Date] [Paid: All] [Program: All] [Category: All]

	Participant	Date	Paid	Program	Category
	Participant Three	10/10/2011	Paid	Behavioral Program	Indoor Lesson
	Participant Four	10/09/2011	Paid	Emotional	Ground Care/Grooming
	Participant Eight	10/08/2011	Paid	Disabilities	Indoor Lesson
	Participant Nine	10/07/2011	No Charge	Emotional	Trail Ride
	Participant Five	10/06/2011	Paid	Disabilities	Trail Ride
	Participant Eight	10/05/2011	Paid	Disabilities	Indoor Lesson
	Participant Eight	10/04/2011	Paid	Emotional	Indoor Lesson
	Participant Nine	10/03/2011	No Charge	Emotional	Trail Ride
	Participant Two	10/02/2011	No Charge	Sports Therapy	Trail Ride
	Participant Ten	10/01/2011	Paid	Sports Therapy	Outdoor Lessons

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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.

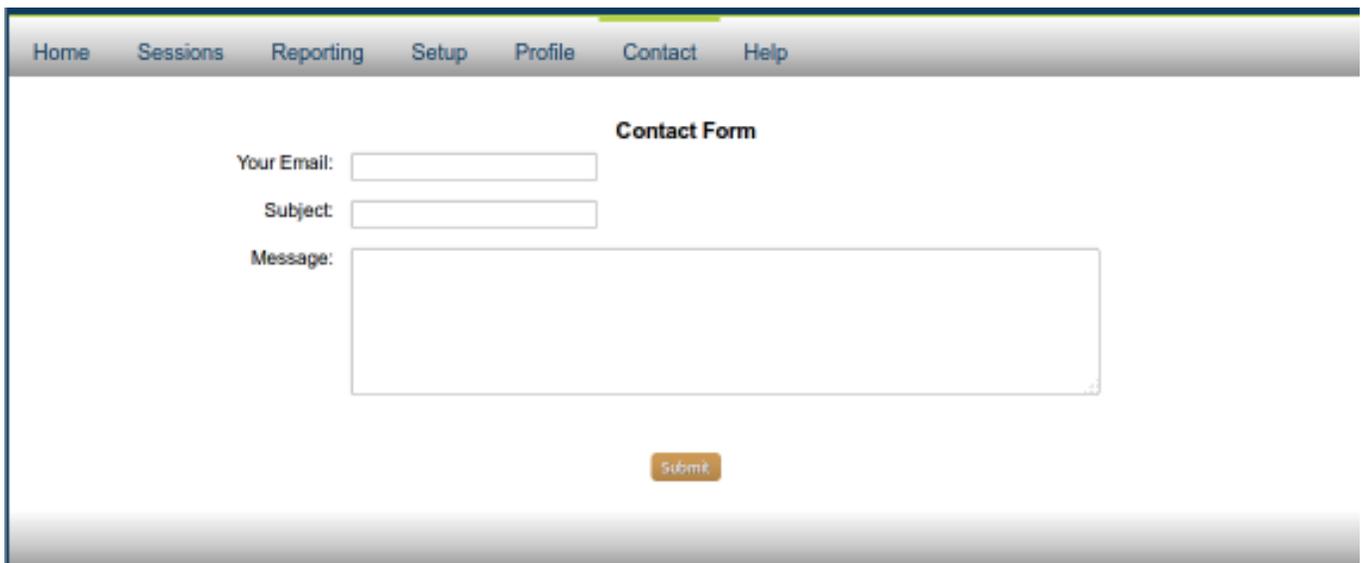
The screenshot displays a web application interface for session reporting. At the top, a navigation bar includes links for Home, Sessions, Reporting, Setup, Profile, Contact, and Help. Below this, a sub-menu highlights 'Sessions' among other options like Participants, Staff, Volunteers, Horses, Categories, and Programs. A 'printable version' link is located in the upper right corner. The main section is titled 'Session Data' and features a table with the following data:

Date	Participant	Paid Status
Dec. 2, 2011	Participant Nine - Horse7	No Charge
Dec. 2, 2011	Participant Two - Horse 5 Horse1 Horse7	No Charge
Dec. 1, 2011	Participant Four - Horse7	Paid
Nov. 30, 2011	Participant Five - Pony2	Paid
Nov. 29, 2011	Participant Eight - Horse1	Paid
Nov. 28, 2011	Participant Eight - Horse Three	Paid
Nov. 28, 2011	Participant Three - Horse 4	Paid
Nov. 25, 2011	Participant Nine - Pony1	No Charge
Nov. 22, 2011	Participant Eight - Horse 4	Paid
Nov. 8, 2011	Participant One -	Unpaid

To the left of the table is a 'Filters' panel containing input fields for 'from date' and 'to date', and dropdown menus for '(all participants)', '(all staff)', '(all volunteers)', '(all horses)', '(all programs)', '(all categories)', and '(all pay status)'. A 'Search' button is positioned at the bottom of the filters panel.

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.



The screenshot shows a web application interface with a top navigation bar containing the following menu items: Home, Sessions, Reporting, Setup, Profile, Contact, and Help. The 'Contact' menu item is highlighted with a green underline. Below the navigation bar, the page title is 'Contact Form'. The form consists of three input fields: 'Your Email:' with a text box, 'Subject:' with a text box, and 'Message:' with a larger text area. At the bottom center of the form is a brown 'submit' button.

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!