

Software User's Manual

E-Lockbox

Team 05

Name	Roles
Chen "Miles" Gui	Primary Role: Project Manager/ Implementer. Secondary Role: Tester.
Huaiqi Wang	Primary Role: Tester Secondary Role: Implementer
Weiyi Zhong	Primary Role: Implementer. Secondary Role: Tester.
Woon Kim	Primary Role: IIV&Ver. Secondary Role: Tester.
Azuka Okuleye	Primary Role: Implementer. Secondary Role: Tester.
Cecilia Jou	Primary Role: IIV&Ver. Secondary Role: Tester.

Version History

Date	Author	Version	Changes made	Rationale
03/25/14	Huaiqi Wang	1.0	<ul style="list-style-type: none">Initial User manual draft	<ul style="list-style-type: none">The initial user Manual draft its created as a guideline for the CCD clients presentation

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1. Introduction

1.1 System Overview

The purpose of our system *E-Lockbox* is to help employees working at Living Advantage manage their documents securely and conveniently. *E-Lockbox* will be secure, yet accessible to gather and hold records on youth in the foster care system. *E-Lockbox* will help recruit such youth and mentors, both directly and indirectly. This allows them to be identifiable and able to receive services and resources from the community on a consistent basis. They can better advocate for themselves as we assist in setting up a database for their personal history of information. They will be provided with access to continuous on line education and offered independent living skills and employment resources.

The website will serve as a virtual online community for youth to voice their opinions, achievements, be engaged at our events and activities that help promote lifelong connections to supportive adults and peers for a higher rate of self sufficiency

1.2 System Requirements

1.2.1 Hardware Requirements

There is no specific hardware needed for running the system except a computer with internet access.

1.2.2 Software Requirements

Although E-Lockbox is going to be deployed in Go Daddy and use Amazon S3 to store vital documents and no specific requirements are needed, E-Lockbox has been tested on the following and desirable software configurations:

Software Required	Name and Version
Operative system	Windows 8, Mac OS 10.8
Web Browser	Chrome, Safari, Firefox

1.2.3 Other Requirements

2. Installation Procedures

No installation is needed.

2.1 Initialization procedures

2.2 Re-installation

2.3 De-installation

3. Operational Procedures

3.1 User Management

3.1.1 Main page

The screenshot displays the 'User Management' interface. At the top, there is a navigation menu with 'ELockbox', 'Dashboard', 'Cases', 'Users', 'Reports', and 'Settings'. Below this, a search bar for 'Search Cases...' and user information 'Hello, Administrator' and 'Account' are visible. The main content area is titled 'User Management' and includes a '+ New' button, a 'Level: All' dropdown, and a search field. A table lists the following users:

Name	Email	Phone Number	Level	Status	View	Edit
General Users	general@elockbox.local	123-456-7890	General User	Active		
Case Manager	manager@elockbox.local	123-456-7890	Case Manager	Active		
Administrator	admin@elockbox.local	123-456-7890	Administrator	Active		
Administrator	jason@elockbox.local	123-456-7890	Administrator	Active		

Figure 1 User management home page

After clicking the new button under the label 'User Management', the system would redirect to creating a new user page(Chapter 1.2). At the right of the home page, there is a level filter and a search text field for searching(Chapter 1.3). The system lists all users sorted by their level and status, including users' name, email, phone-number, level and status. There are two buttons at the right of a item. The view button is used for viewing one user's information(Chapter 1.4). The edit button is used for editing user's information(Chapter 1.5).

3.1.2 Create new user page

Creating a new user needs user's basic information, like first name, last name, email, address, etc...Furthermore, an administrator can set a username and a password for the new user. The system would set the new user's status as active, and the administrator should set the new user's level.

The save button at the bottom of the page is used for saving information of the new user. The system would provide success messages or error messages for the administrator according to the process responses. The information in the form like phone number or email have fixed format, and the system would check them when the administrator submit the information.

Add User

User Name:

Password:

Confirm Password:

First Name:

Last Name:

Email:

Phone Number:

Address1:

Address2:


City: **State:** **Zipcode:**

level:

Save
Cancel

Figure 2 Add a new user page

3.1.3 Filter and search



User Management

+
New

Level:

Case Manager ▾

case

Q

Name	Email	Phone Number	Level	Status	
Case Manager	manager@elockbox.local	123-456-7890	Case Manager	Active	<div style="display: flex; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; background-color: #34495e; color: white; border-radius: 3px;">View</div> <div style="border: 1px solid #ccc; padding: 2px 5px; background-color: #27ae60; color: white; border-radius: 3px;">Edit</div> </div>

Figure 3 Results after using filters and search field

In the system, we have two kinds of filters. One is a level filter. The administrator can choose people with a same level. The other one is a text field. The administrator can use a user’s first name, last name or email as a search criteria. After clicking the search button, the system would return expected information.

3.1.4 View user information

View User

 Edit  Reset Password

Username	manager
Name	Case Manager
Email	manager@elockbox.local
Phone Number	123-456-7890
Address	, , , ,
Level	Case Manager
Status	Active

Figure 4 View user information

There are two buttons in the view user information page, edit button and reset password button. Edit button is same to the edit button in the home page. Reset password button is used for the administrator resetting password for a specific user.

Reset Password

Old password:	<input type="text" value="Old Password"/>
Password:	<input type="text" value="Password"/>
Confirm Password:	<input type="text" value="Confirm Password"/>

Figure 5 Reset password page

3.1.5 Edit user information

Administrator can change all information for a user. In Figure 6.

Edit User

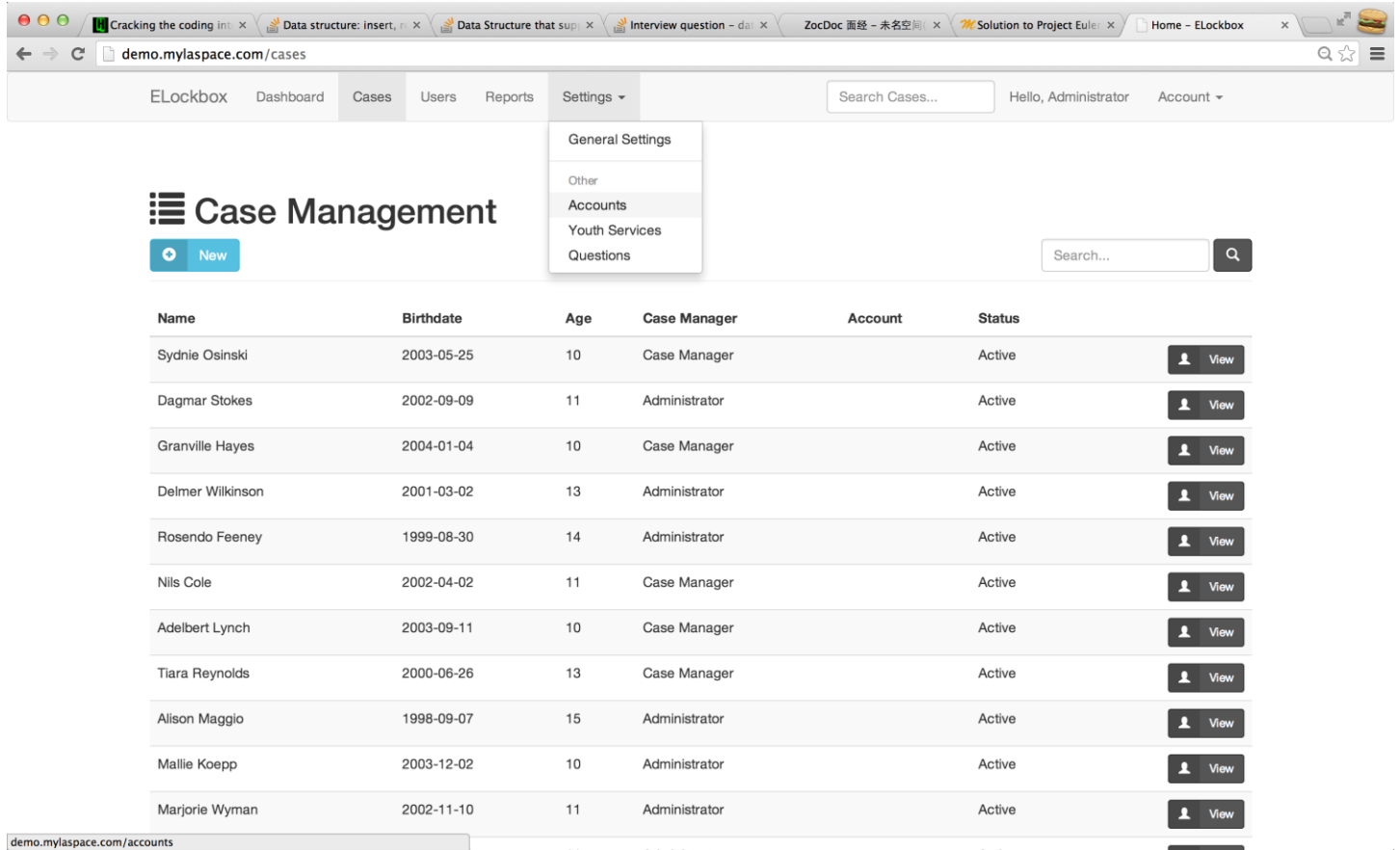
 **Reset Password**

Username:	<input type="text" value="general"/>				
First Name:	<input type="text" value="General"/>				
Last Name:	<input type="text" value="Users"/>				
Email:	<input type="text" value="general@elockbox.local"/>				
Phone Number:	<input type="text" value="123-456-7890"/>				
Address1:	<input type="text" value="Address1"/>				
Address2:	<input type="text" value="Address2"/>				
City:	<input type="text" value="City"/>	State:	<input type="text" value="State"/>	Zipcode:	<input type="text" value="Zipcode"/>
level	<input style="border: none; border-bottom: 1px solid #ccc; padding: 2px 5px;" type="text" value="General User"/>				
Status	<input style="border: none; border-bottom: 1px solid #ccc; padding: 2px 5px;" type="text" value="Active"/>				

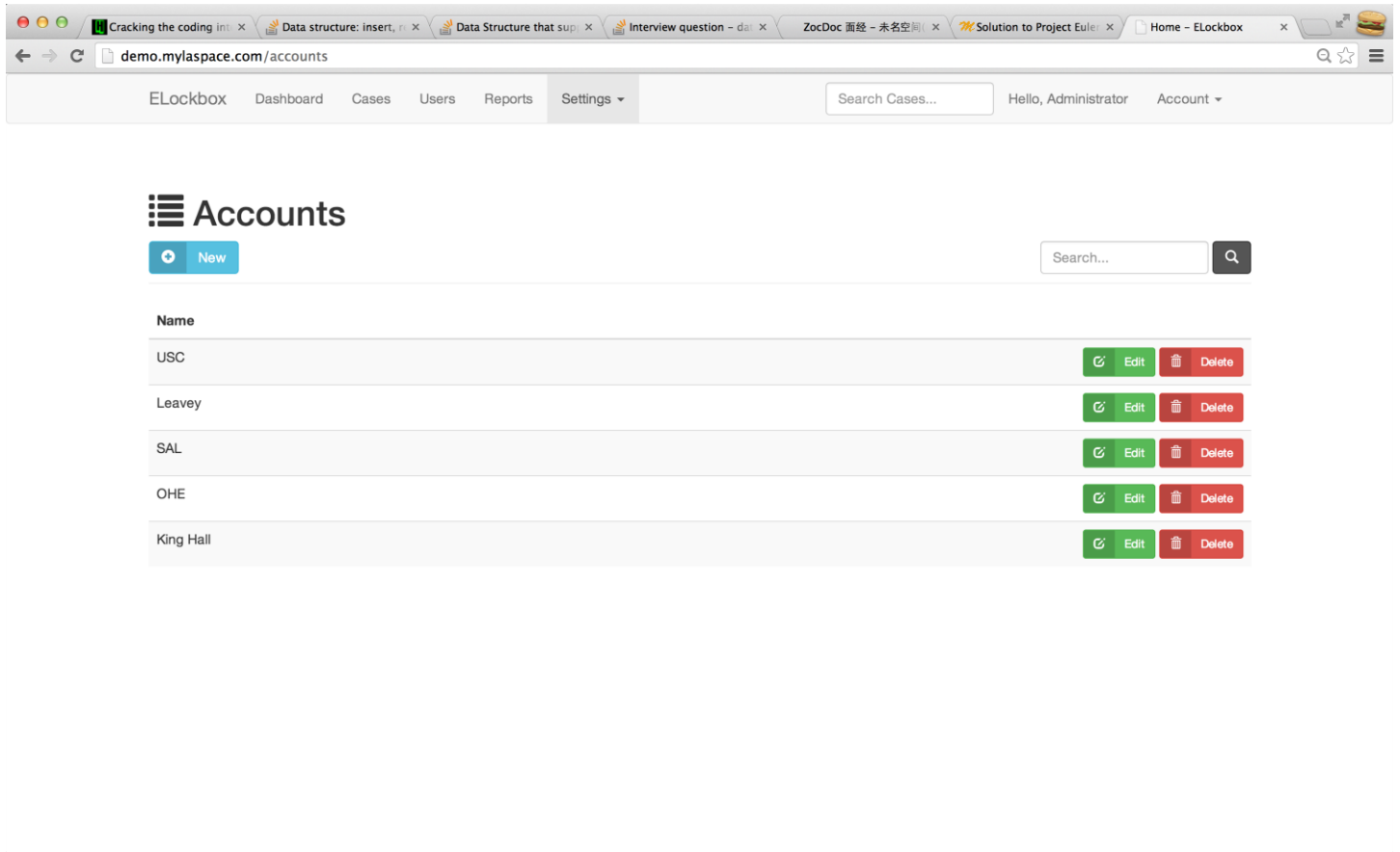
Figure 6 Edit user information

3.2 Case Management

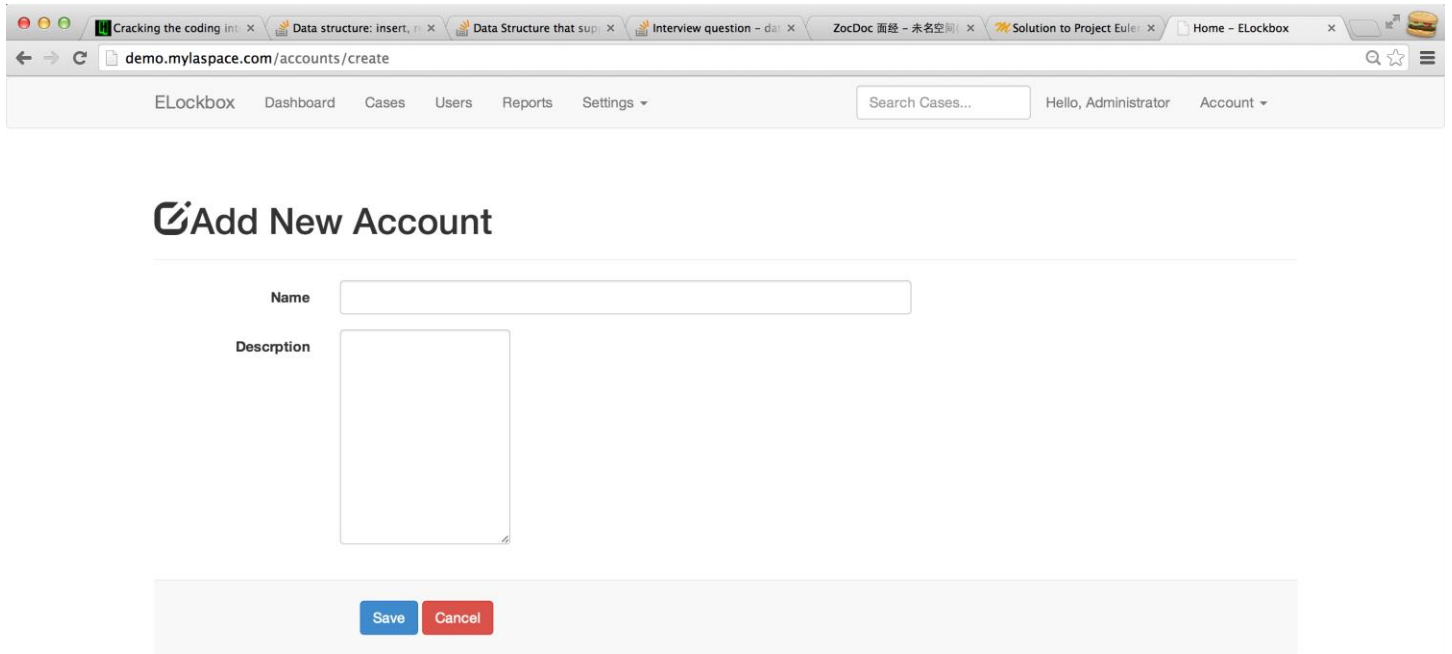
3.2.1 Add/Delete Accounts



Under Settings dropdown menu, administrators can click Accounts to go to Accounts Main Page.

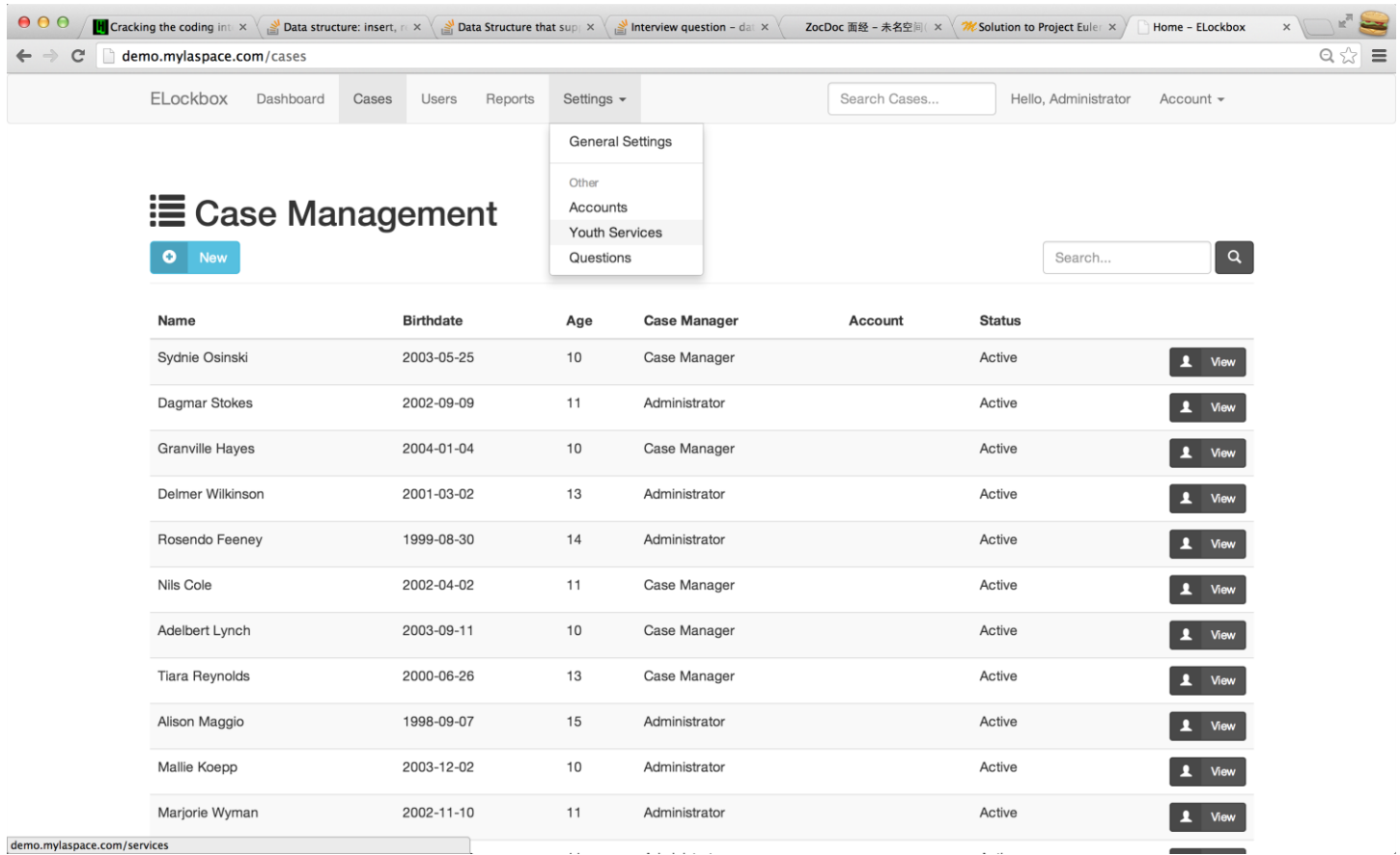


In the Accounts Main Page, New button is for creating a new Account, Edit button is for editing an exiting Account, Delete button is for deleting an exiting Account.

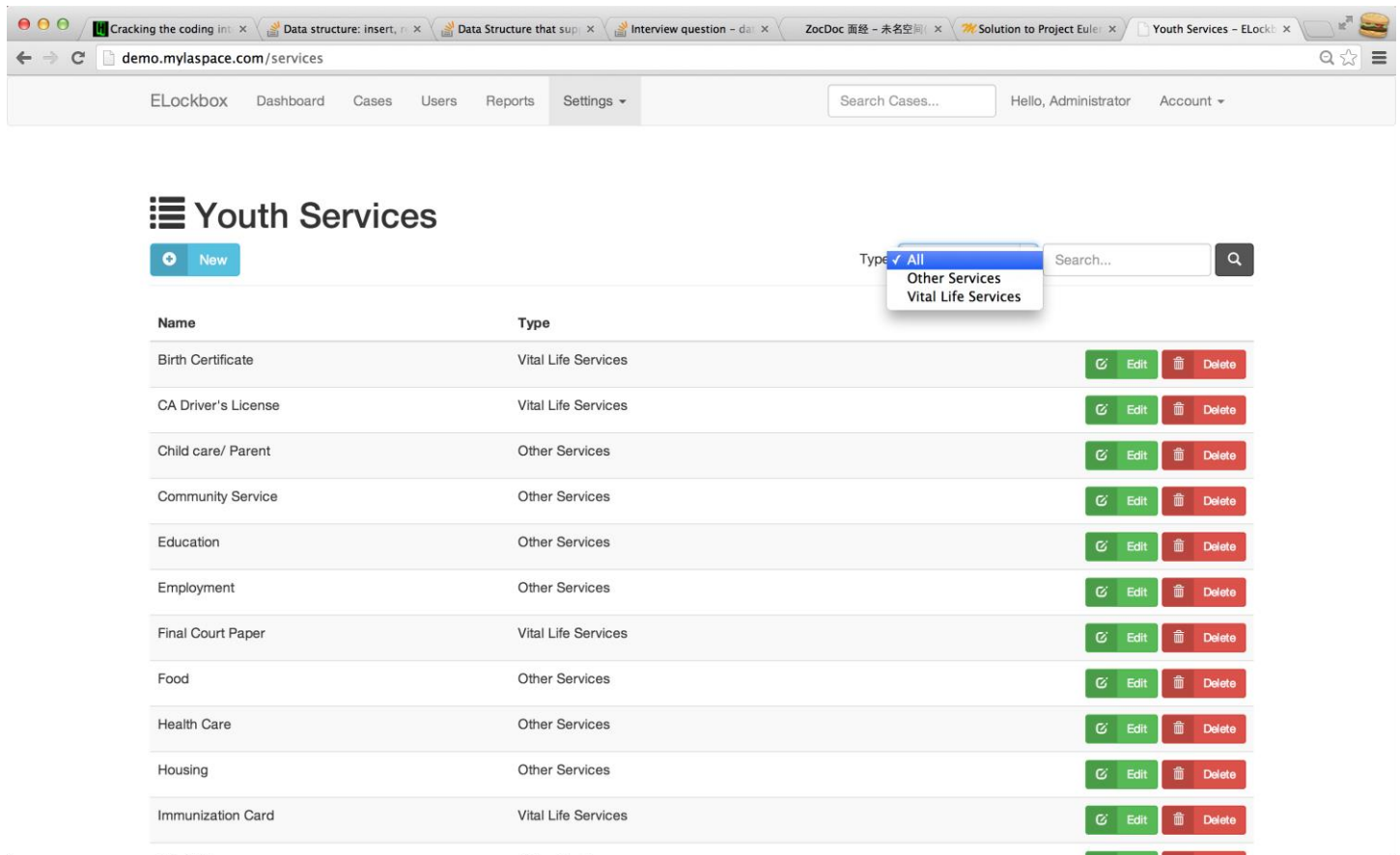


After clicking the New button, administrator can enter Name and Description to create a new Account. Edit an exiting Account is similar to this.

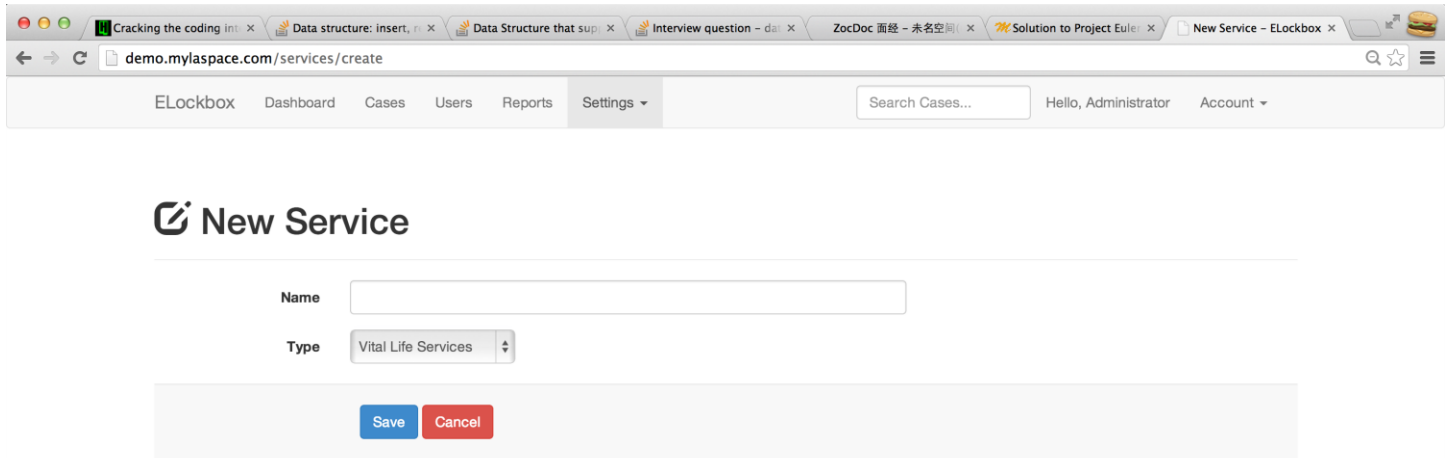
3.2.2 Search/Add/Delete Youth Services



Under Settings dropdown menu, administrators can click Youth Services to go to Youth Services Main Page.

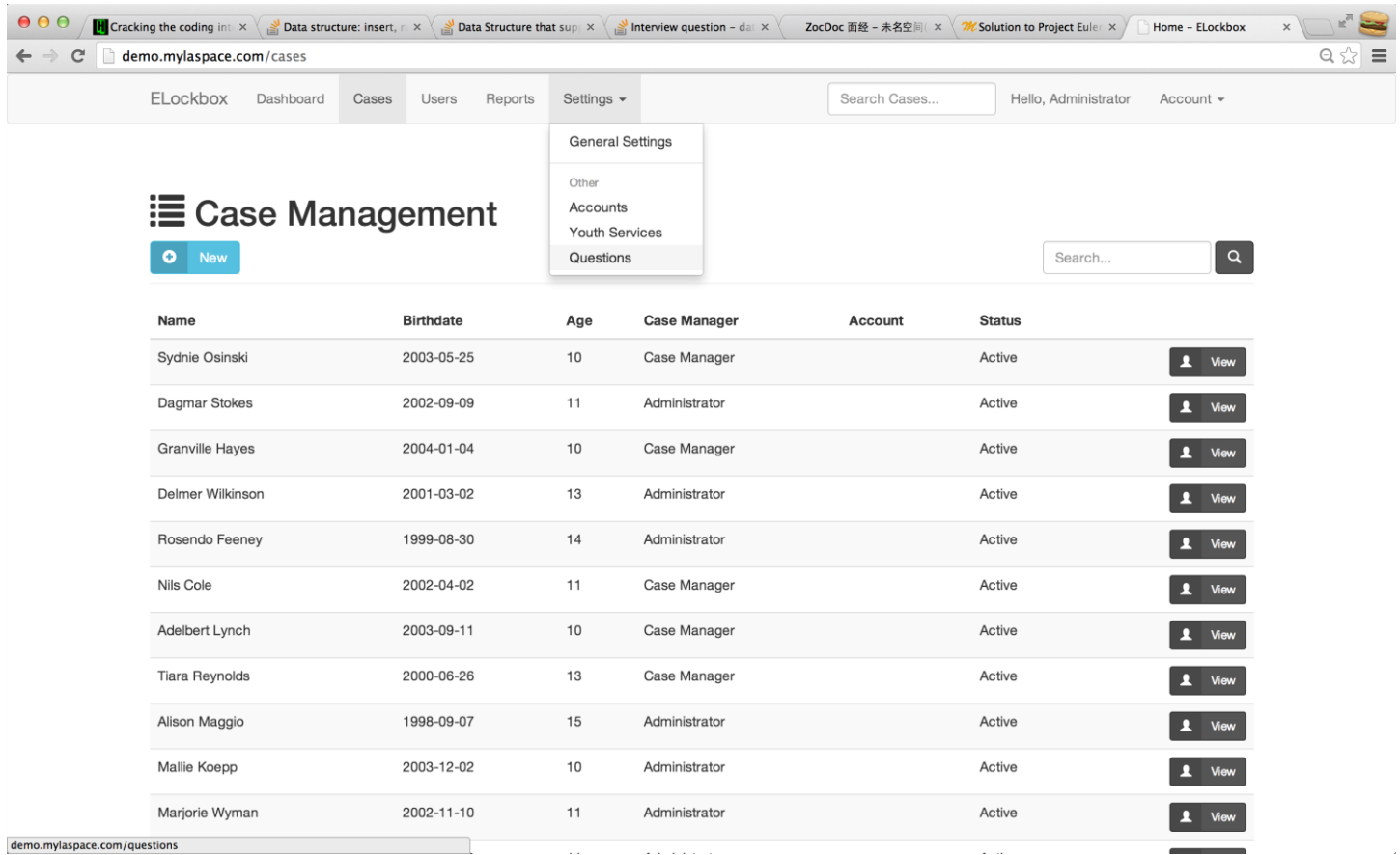


In the Youth Services Main Page, New button is for creating a new Youth Service, Edit button is for editing an exiting Youth Service, Delete button is for deleting an exiting Youth Service. Administrator can select a Youth Service type and enter certain key words to search for certain youth cases.

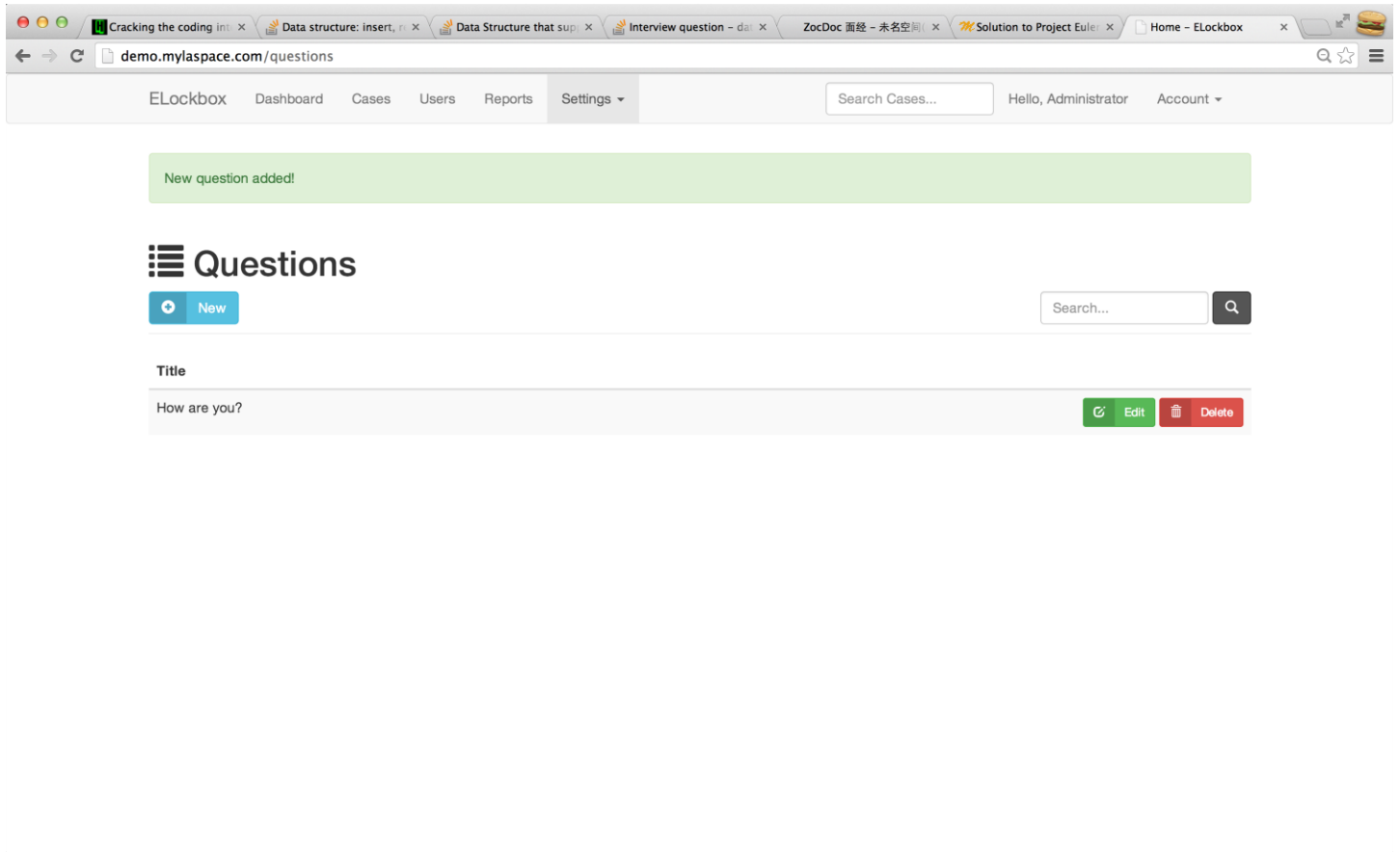


After clicking the New button, administrator can enter Name and select a Type to create a new Youth Service. Edit an exiting Youth Service is similar to this.

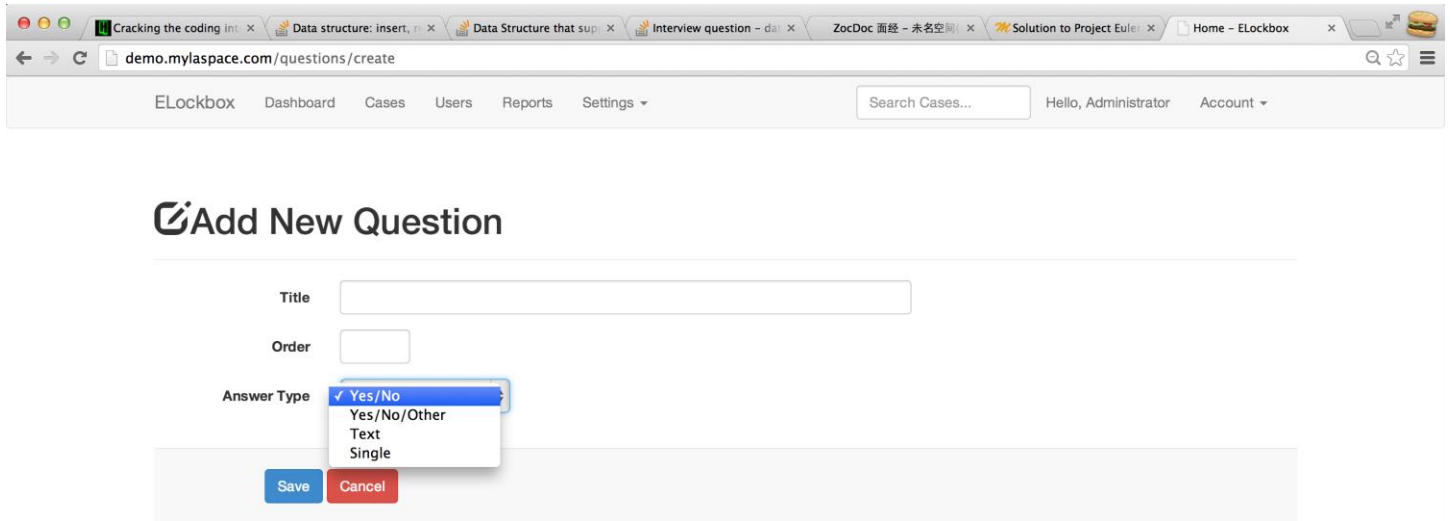
3.2.3 Add/Delete Questions



Under Settings dropdown menu, administrators can click Questions to go to Questions Main Page.



In the Questions Page, New button is for creating a new Question, Edit button is for editing an exiting Questions, Delete button is for deleting an exiting Question.



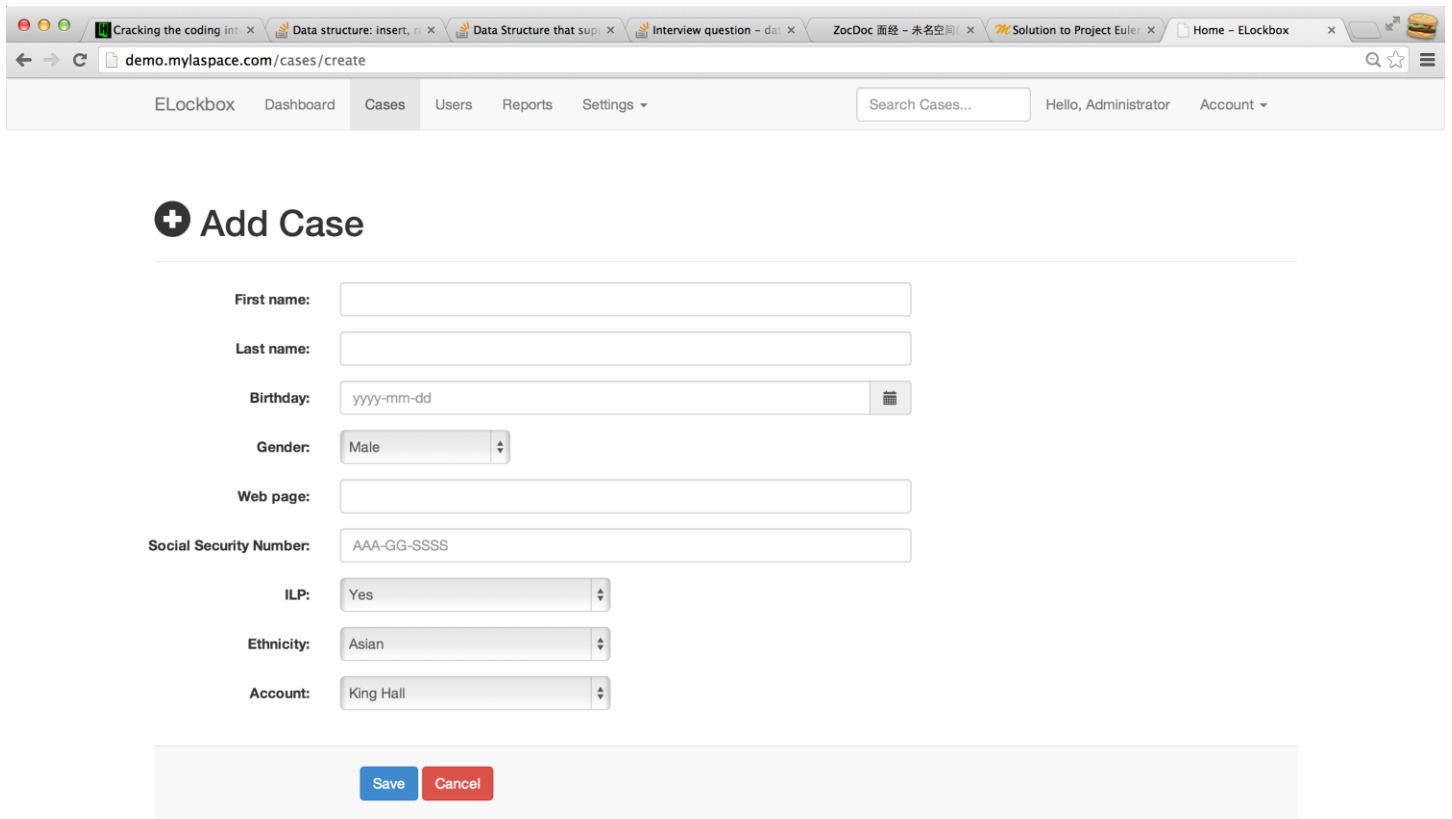
After clicking the New button, administrator can enter Title and Integer Order for displaying Question in the nth place, and select an Answer Type to create a new Question. Edit an exiting Question is similar to this.

3.2.4 Add Cases

The screenshot shows a web browser window with the URL `demo.mylaspace.com/cases`. The browser's address bar and tabs are visible at the top. The application's navigation menu includes 'ELockbox', 'Dashboard', 'Cases', 'Users', 'Reports', and 'Settings'. A search bar labeled 'Search Cases...' is present, along with a user greeting 'Hello, Administrator' and an 'Account' dropdown. The main content area is titled 'Case Management' and features a 'New' button and a search input field. Below this is a table listing cases with columns for Name, Birthdate, Age, Case Manager, Account, and Status. Each row includes a 'View' button with a person icon.

Name	Birthdate	Age	Case Manager	Account	Status	
Sydnie Osinski	2003-05-25	10	Case Manager		Active	View
Dagmar Stokes	2002-09-09	11	Administrator		Active	View
Granville Hayes	2004-01-04	10	Case Manager		Active	View
Delmer Wilkinson	2001-03-02	13	Administrator		Active	View
Rosendo Feeney	1999-08-30	14	Administrator		Active	View
Nils Cole	2002-04-02	11	Case Manager		Active	View
Adelbert Lynch	2003-09-11	10	Case Manager		Active	View
Tiara Reynolds	2000-06-26	13	Case Manager		Active	View
Alison Maggio	1998-09-07	15	Administrator		Active	View
Mallie Koepp	2003-12-02	10	Administrator		Active	View
Marjorie Wyman	2002-11-10	11	Administrator		Active	View

In the Case Management Main Page, New button is for creating a Case. View button is for viewing detailed information of a Case. Administrator can enter keywords in the search bar to find certain Cases.



After clicking the New button, administrator can enter information required to create a new Case. Account type is from Accounts described above.

After clicking the View button, the complete information of a Case is displayed.

The screenshot shows a web browser window with the URL `demo.mylaspace.com/cases/1`. The page title is "View Case".

Basic Information (with an "Edit" button):

- Name: Sydnie Osinski
- Gender: Male
- Status: Active
- Account:
- Birthdate: 2003-05-25
- Webpage:
- ILP: Yes
- Age: 10
- Social Security Number: XXX-XX-
- Ethnicity: Multiracial

Services (with an "Edit" button):

- Vital Life Services:**
 - Birth Certificate
 - Naturalization papers
 - CA Driver's License
 - Photo ID
 - Final Court Paper
 - Social Security Card
 - Immunization Card
 - Worker's permit
- Other Services:**
 - Child care/ Parent
 - Food
 - Mentoring
 - Community Service
 - Health Care
 - Transportation
 - Education
 - Housing
 - Tutoring
 - Employment
 - Life Skills

Contact Details (with "Edit" and "Add" buttons):

Phone Numbers

Emails

- ✓ No.1 : rconroy@example.net

Address Information (with "Edit" and "Add" buttons):

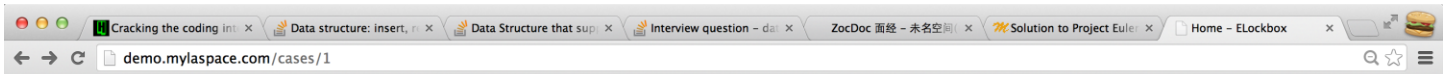
- ✓ No.1: 35762 Houston Junctions Apt. 081, , Willmsburgh, AR, 69988
- ✗ No.2: 25441 Carter Harbors Apt. 208, , Ratkehaven, MT, 59068

Additional Contacts (with "Edit" and "Add" buttons)

Emergency Contacts (with "Edit" and "Add" buttons)

Education History (with an "Add" button):

Start Date	End Date	School Name	Level	Address	Current	Note
2010-01-22	2013-02-24	Franecki Ltd	Middle School	386 Brekke Overpass Suite 855Riceville, AZ 90687-9560	No	Voluptatibus odio Edit



Education History + Add

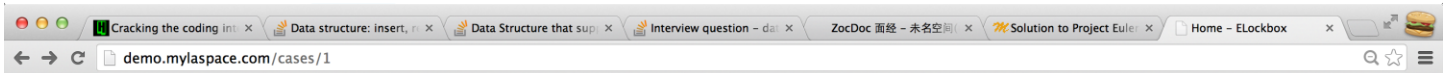
Start Date	End Date	School Name	Level	Address	Current	Note
2010-01-22	2013-02-24	Franecki Ltd	Middle School	386 Brekke Overpass Suite 855Riceville, AZ 90687-9560	No	Voluptatibus odio Edit

Work History + Add

Start Date	End Date	Company Name	Industry	Current	Note
2011-02-10	2011-08-09	Lakin Ltd	Television	No	Voluptatem Edit

Activity + Add

Start Date	End Date	Action	Created by	Description
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Start Date	End Date	Company Name	Industry	Current	Note
2011-02-10	2011-08-09	Lakin Ltd	Television	No	Voluptatem Edit

Activity + Add

Start Date	End Date	Action	Created by	Description
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Activity History + Add

Action	Start Time	End Time	Assigned to	Description
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Vital Documents Upload

Type	Title	Uploaded By	Upload Date	Last Modified Date/Time	View	Edit
Driving License	Driving License	Administrator	03/26/2014 at 06:16pm	03/26/2014 at 06:16pm	View	Edit
Social Security	Social Security	Administrator	03/26/2014 at 08:04pm	03/26/2014 at 08:04pm	View	Edit
Other	Other	Administrator	03/26/2014 at 08:08pm	03/26/2014 at 08:08pm	View	Edit

In the View Case Page, Edit button is for editing related fields information, Add button is for adding related fields information.

3.2.5 Generate Username and Password

The screenshot shows the ELockbox web application interface. The browser address bar displays `demo.mylaspace.com/cases/1`. The navigation menu includes **ELockbox**, **Dashboard**, **Cases**, **Users**, **Reports**, and **Settings**. A search bar labeled "Search Cases..." and a user greeting "Hello, Administrator" are visible. The main content area is titled "View Case" and features a profile icon. Below the title is an orange button labeled "Generate username & password" and a grey button labeled "Questionnaire".

The "Basic Information" section includes an "Edit" button and the following details:

Name: Sydnie Osinski	Birthday: 2003-05-25	Age: 10
Gender: Male	Webpage:	Social Security Number: XXX-XX-
Status: Active	ILP: Yes	Ethnicity: Multiracial

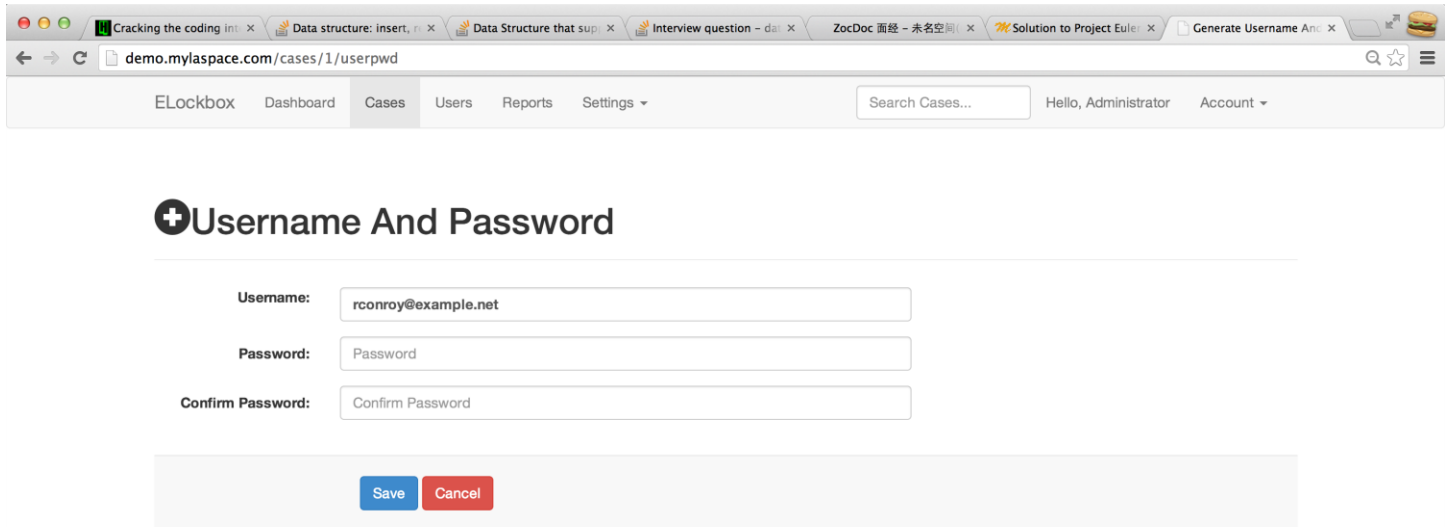
The "Account:" section is currently empty.

The "Services" section includes an "Edit" button and lists various services:

Vital Life Services	<input checked="" type="checkbox"/> CA Driver's License	<input checked="" type="checkbox"/> Final Court Paper	<input checked="" type="checkbox"/> Immunization Card
<input checked="" type="checkbox"/> Birth Certificate	<input checked="" type="checkbox"/> Photo ID	<input checked="" type="checkbox"/> Social Security Card	<input checked="" type="checkbox"/> Worker's permit
Other Services	<input checked="" type="checkbox"/> Community Service	<input checked="" type="checkbox"/> Education	<input checked="" type="checkbox"/> Employment
<input checked="" type="checkbox"/> Child care/ Parent	<input checked="" type="checkbox"/> Health Care	<input checked="" type="checkbox"/> Housing	<input checked="" type="checkbox"/> Life Skills
<input checked="" type="checkbox"/> Food	<input checked="" type="checkbox"/> Transportation	<input checked="" type="checkbox"/> Tutoring	
<input checked="" type="checkbox"/> Mentoring			

The "Contact Details" section includes "Edit" and "Add" buttons. Below this section, the text "Phone Numbers" is visible.

In the View Case Page, administrator can click Generate username & password button to generate Username and Password for the target person of this specific Case.



After clicking the Generate username & password button, administrator can enter Username and Password to generate Username and Password for the target person of this specific Case.

3.2.6 Upload Vital Documents

The screenshot shows a web browser window with the URL `demo.mylaspace.com/cases/1`. The page content is as follows:

Start Date	End Date	Company Name	Industry	Current	Note
2011-02-10	2011-08-09	Lakin Ltd	Television	No	Voluptatem

Activity [+ Add](#)

Start Date	End Date	Action	Created by	Description
------------	----------	--------	------------	-------------

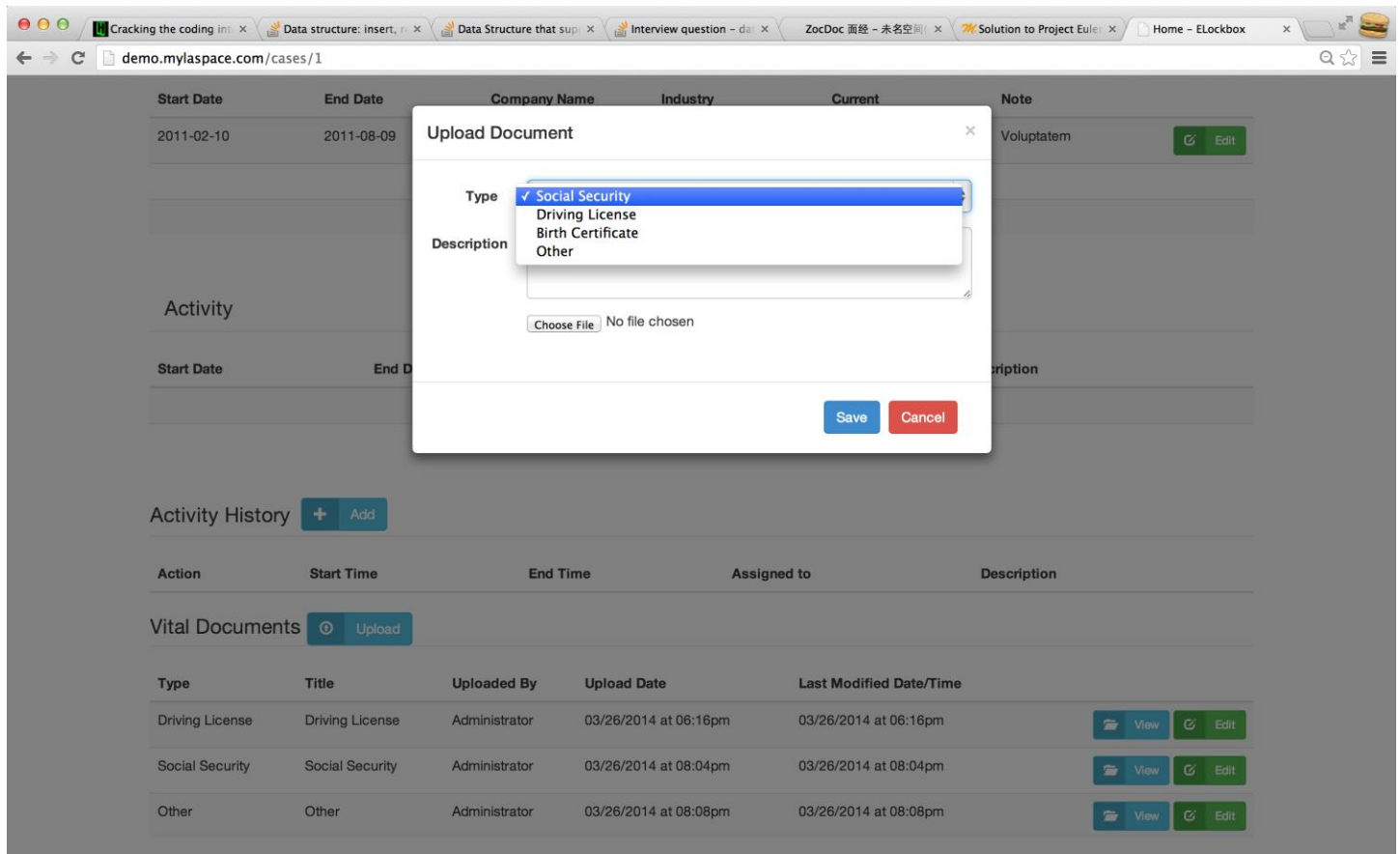
Activity History [+ Add](#)

Action	Start Time	End Time	Assigned to	Description
--------	------------	----------	-------------	-------------

Vital Documents [Upload](#)

Type	Title	Uploaded By	Upload Date	Last Modified Date/Time	View	Edit
Driving License	Driving License	Administrator	03/26/2014 at 06:16pm	03/26/2014 at 06:16pm	View	Edit
Social Security	Social Security	Administrator	03/26/2014 at 08:04pm	03/26/2014 at 08:04pm	View	Edit
Other	Other	Administrator	03/26/2014 at 08:08pm	03/26/2014 at 08:08pm	View	Edit

At the bottom of View Case Page, administrator can Upload Vital Documents and View Vital Documents through clicking the Upload button and View button.



After clicking the Upload button, administrator can select a document Type, enter a Description and choose a file from his/her disk to be uploaded.

3.3 Report

Have not been completely implemented. Will be implemented.

4. Troubleshooting

4.1 Frequently Asked questions

<< [List Frequently Asked Questions by operators, and answers to those questions.](#) >>

4.2 Error Codes and Messages

Error/ Message	Meaning of the message	Action to be taken
User creation fields uncompleted	One or more fields of the user creation fields cannot be empty or incorrect	Complete or modify the information in the pointed field
Case creation fields	One or more fields of the case creation fields	Complete or modify the information in the

uncompleted	cannot be empty or incorrect	pointed field
-------------	------------------------------	---------------

4.3 Note

<i>Term</i>	<i>Meaning</i>
Accounts	Accounts used to show the types of cases.