

# User's Manual v1.2

May 5, 2017

## I. Revision Signatures

The following asserts that all team members have read the document and assert that the information contained within this document is complete and correct.

Name	Signature	Date
James Stewart		
Quang Nguyen		
Michael Giba		
Thaddeus Rix		
Son Nguyen		

## **II. Revision History**

All revision history of this document is listed below.

Version	Changes	Edited Date
Version 1.0	Initialized draft	April 16 <sup>th</sup> , 2017
Version 1.1	Updated format and revised	May 1 <sup>st</sup> , 2017
Version 1.2	Checked punctuation	May 5 <sup>th</sup> , 2017

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### 1. Introduction

### 1.1 Purpose

The document serves to provide all users of the SRS system a guide for using the system. The various users can be broken up into three main categories: submitters, reviewers and administrators. The first set of instructions is for submitters on how to interact with the site during the annual SRS event in regards to submitting and reviewing posters. The second set of instructions are for department chairs to handle the voting process. Lastly will be a set of instructions for administrators. The document will provide all the functions in each field of the admin panel, depending on the roles of the administrators.

### 1.2 Project Background

The Michael and Sally McCracken Student Research Symposium (SRS) is an event at TCU that invites undergraduate and graduate students to showcase their research projects to their colleagues and professors. The projects can be involved in any of the Science and Engineering disciplines at TCU, including interdisciplinary. The students participating will present their research projects inside of the Tucker Technology Center on a predetermined date.

TCU's old SRS site provided an outdated submission-review system for SRS. The previous system was mostly a front-end to a collection of manual procedures to receive, review, and present research projects. There was a growing need to make a more robust system that could provide smarter interfaces for various users that would allow for secure submitting, voting, and administrating.

The new system provides a host of automated processes that facilitate in the managing of the SRS event from year to year. This is possible due to a myriad of free technologies such as Django that allow for a more seamless experience participating in and managing SRS.

#### 1.3 Document Overview

- **Section 2** System Components
- **Section 3** Submitter Walkthrough
- **Section 4** Reviewer Walkthrough
- **Section 5** Administrator Walkthrough
- **Section 6** Glossary of Terms

## 2. System Components

#### 2.1 Submitter Reviewer Web Interface

The submitter has a web interface with which they can register and sign into their account wherein they can submit their abstract, poster, and personal information. Here, they are able to update and monitor their submitted information.

The chair should be provided an authorized account and credentials with which they can sign in to the web interface, get ballots for their department posters, and select the undergraduate and graduate winners of their department.

The website has good user experience design, especially by being mobile friendly. The website interfaces with system's database, providing updated information about SRS events, abstracts, posters, winners, etc.

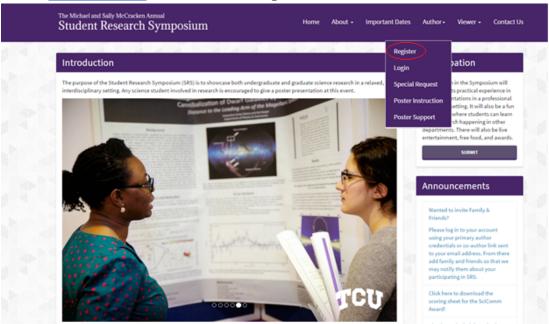
### 2.2 Administrator Control Panel

The administrator has authorization to use an admin panel that is separate from the site and has a set of tools to manage the site and process requests from other users. Examples of these abilities include the capability to create, edit and delete individual submission accounts of students or reset password of individual submission accounts. The administrator has the responsibility to update important information such as important dates related to the SRS event, SRS Committee members' information, and department chairs' information. Finally, the administrator is able to generate different types of reports (name badge, excel docs) to support SRS events.

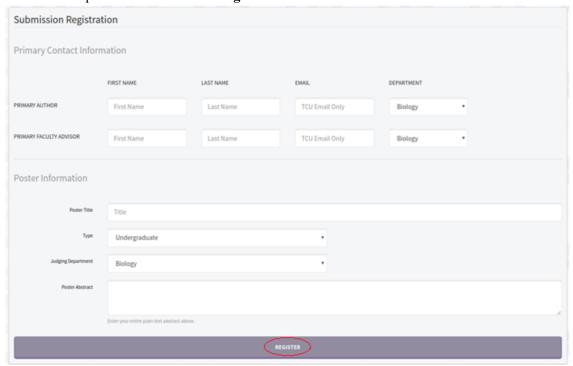
## 3. Submitter Walkthrough

### 3.1 Registration

1. Go to www.srs.tcu.edu, click Author  $\rightarrow$  Register.



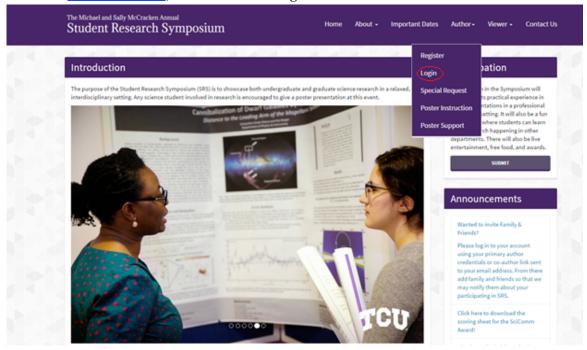
2. Fill out required fields and click Register.



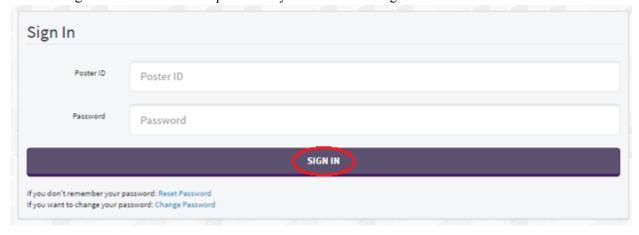
3. If the registration is successful the primary author should receive an email with PosterID and a password.

### 3.2 Poster Submission

1. Go to www.srs.tcu.edu, click Author  $\rightarrow$  Login.



2. Login with the credentials provided by the email after registration.



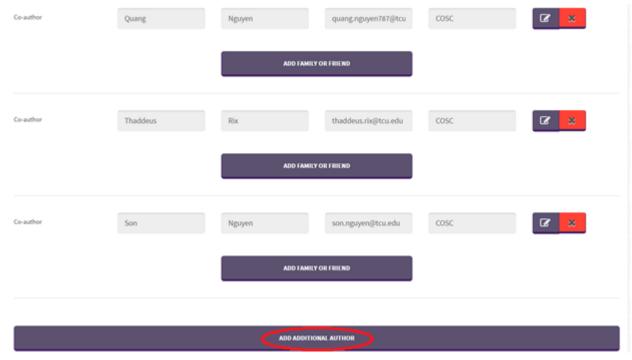
3. Update poster by clicking Choose File, then click Save Above Changes.

### 3.3 Updating Additional Information

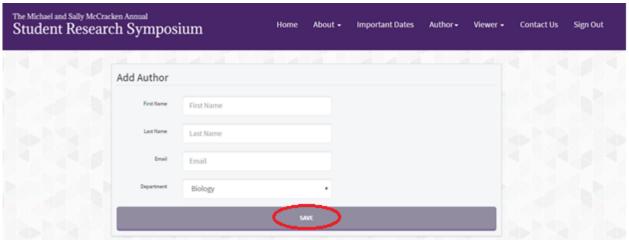
In the Submission Portal above, if the submitters scroll down, they can see additional information to add.

#### 3.3.1 Add Additional Author

1. Click **Add Additional Author** in the Submission Portal.



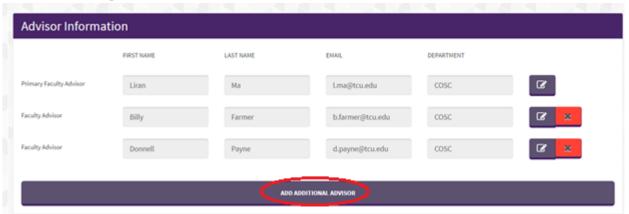
2. Put the information of the additional author, then click Save.



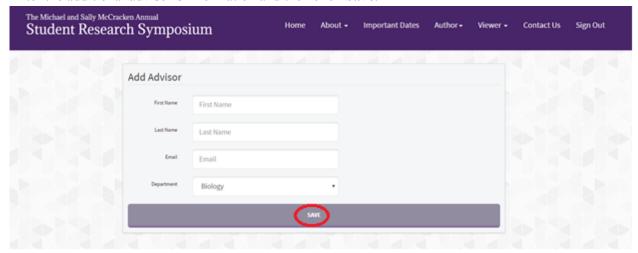
(Note that only the main author can add more authors to the poster. Other authors do not have the privilege to add other authors unless they have the credentials to log in to the portal.)

#### 3.3.2 Add Additional Advisor

1. In the submission portal, click Add Additional Advisor.

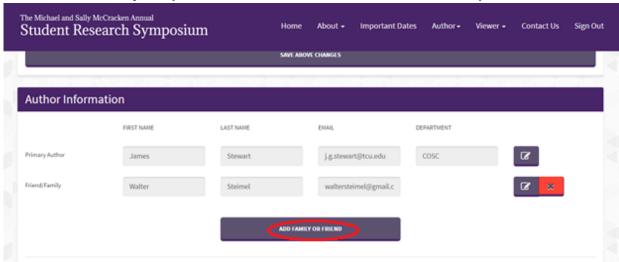


2. Enter the additional advisor's information and then click Save.

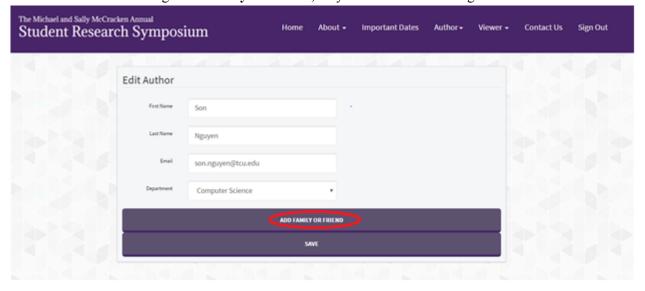


#### 3.3.3 Add Additional Guest

1. If the submitter is the primary author, in the Submission Portal, click Add Family or Friend.



If the submitter is registered by the primary author, they should check their email for a notification sent by <u>noreply@srs.tcu.edu</u>. This email will contain a link to allow them to edit their information. After clicking **Add Family or Friend**, they will see the following screen.



The Michael and Sally McCracken Annual
Student Research Symposium

Home About - Important Dates Author - Viewer - Contact Us Sign Out

Add Guest

First Name
Last Name
Lend I Email

Relationship
Home State: TX, MS
Home Country

Home Country

SAVE

2. Enter the guest information to the fields then click Save.

#### 3.3.4 Remove Author/Advisor/Guest

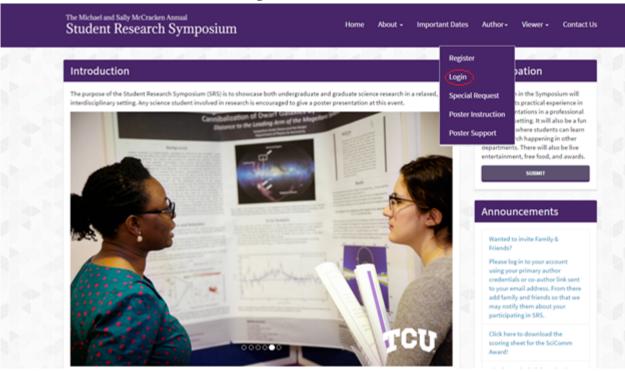
3. In the Submission Portal, click the red X button on the right side to delete.



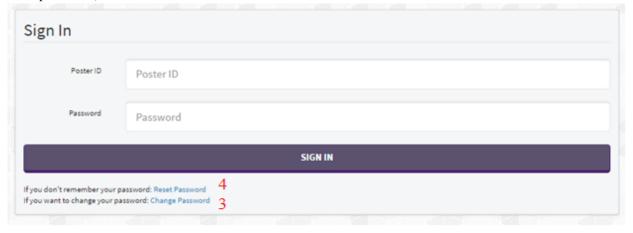
(Note that only the main author can add more authors to the poster. Other authors do not have the privilege to add other authors unless they have the credentials to log in to the portal.)

### 3.4 Password Management

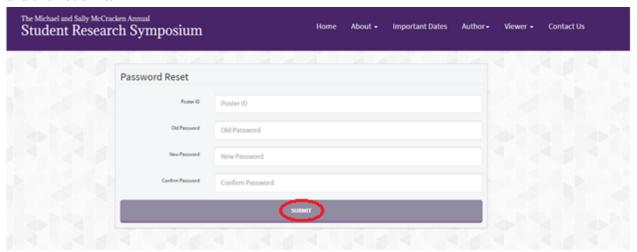
1. Go to <u>www.srs.tcu.edu</u>, click **Author** →**Login**.



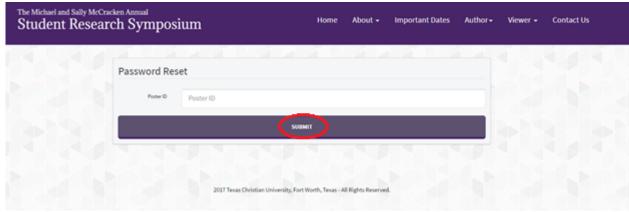
If the submitter wants to change password, click Change Password. If the submitter wants to reset password, click Reset Password



3. If the submitter clicks **Change Password** (indicated by the number 3 in the figure above), there will be a new form displayed with four fields as shown below. Fill in the information required and click **Submit.** 



4. If the submitter clicks **Reset Password** (indicated by the number 4 in the figure for step 2), there will be a new form displayed with one field. Enter the PosterID (the username to login) in the field and click **Submit**. A new password will be in an email sent to the primary author and the primary advisor.

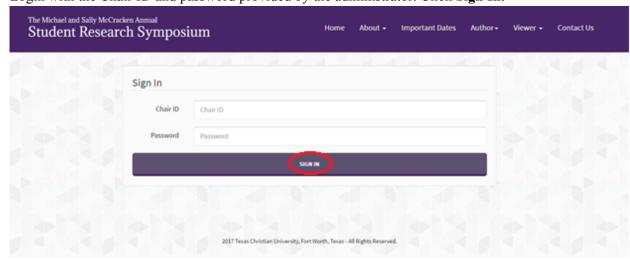


## 4. Reviewer (Chair) Walkthrough

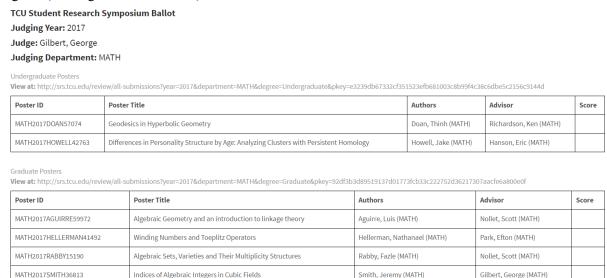
1. Go to <u>www.srs.tcu.edu</u>, click Viewer → Chair Login.



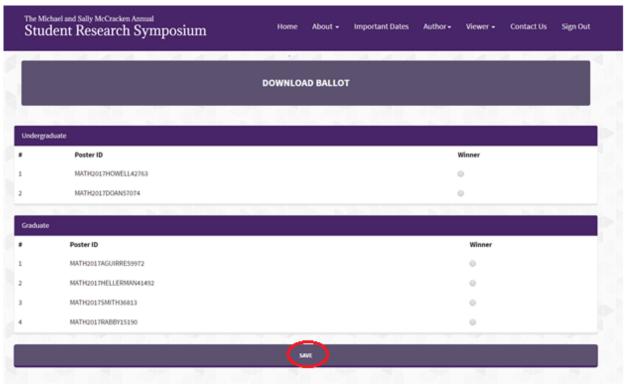
2. Login with the Chair ID and password provided by the administrator. Click Sign In.



3. If the chair wants to download the ballot and send it to other people in the department, click **Download Ballot**. He or she can follow the link to see the list of posters sorted by types of degrees (Undergraduate/Graduate).

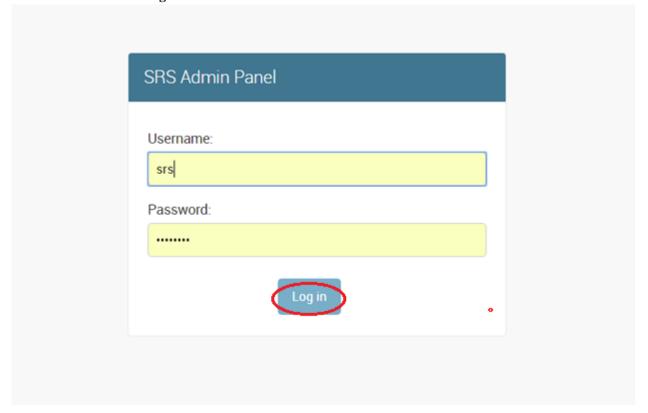


4. After a chair has received the ballots back from their department they can choose the winner. Click on the circle of the poster that is the winner in each section: Graduate and Undergraduate. Click Save to determine the winner.



## 5. Administrator Walkthrough

Every administrator will have to login through <a href="http://www.srs.tcu.edu/admin">http://www.srs.tcu.edu/admin</a>. Fill in the account information and click **Log in**.



## **5.1 Super Administrator**

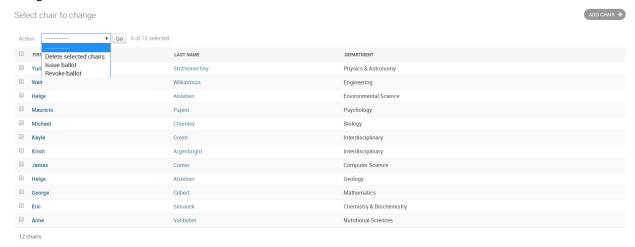
Site administration

_			4.01
Groups	A	+ Add	Change
Users	В	+ Add	Change
SRS_ADMIN			
Announcements	C	+ Add	Change
Building layouts	D	+ Add	Change
Chairs	Е	+ Add	
Deadlines	F	+ Add	Change
Departments	G	+ Add	
Events	Н	+ Add	
Home page images	I	+ Add	Change
Poster locations	J	+ Add	
Sci com logos	K	+ Add	
Speakers	L	+ Add	
Srs committee member	s M	+ Add	
Srs exhibit events	N	+ Add	Change
Years	0	+ Add	Change
SUBMISSION			
Advisors		+ Add	
Authors		+ Add	
Guests		+ Add	Change
Special requests		+ Add	Change
Submission accounts		+ Add	
Winners		+ Add	

- A. **Groups** button will allow the administrator to create groups of users with similar permissions (Dean's Office, Table manager in this case).
- B. Users button will show all the users.
- C. **Announcements** button will show lists of announcements in the main portal. The administrator can add/delete announcements.



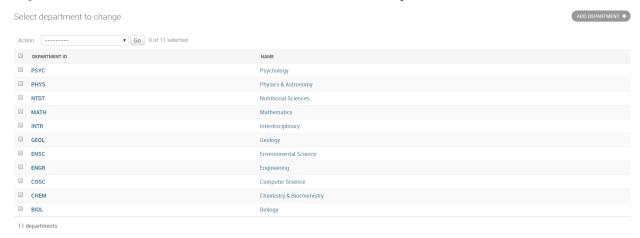
- D. Building Layouts button allows for the uploading of floor plans for table assignments.
- E. Chairs button allows the administrator to modify the chair list and issue/revoke ballots for voting.



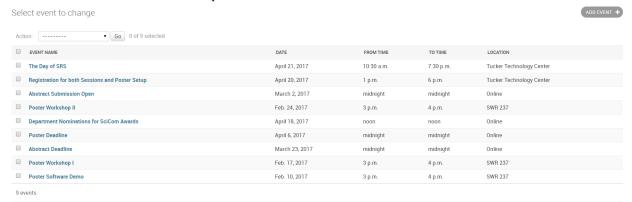
F. **Deadlines** button allows the administrator to add/remove the deadlines. The registration will close on the Hard Deadline. Posters submitted after Poster Deadline will not be eligible for judging. There should be one and only one instance in this model.



G. **Department** button allows the administrator to add/remove the departments.



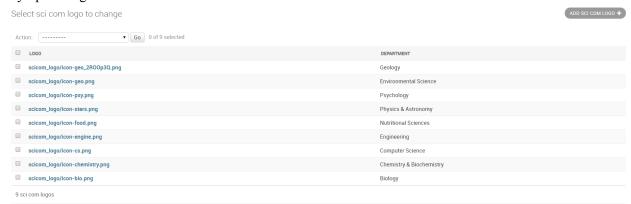
H. Events button allows the administrator to edit events related to the SRS event. This will be reflected on the main website in Important Dates tab.



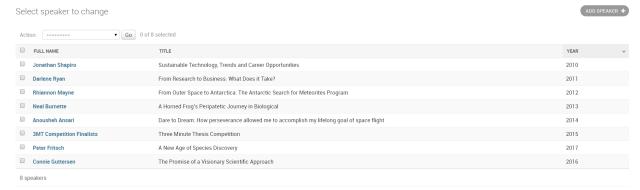
I. Home page images button allows administrator to add pictures to the Home page.



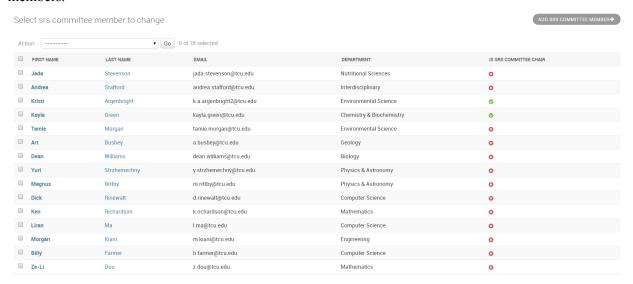
J. Poster Locations allows for locations to be added that correspond to the uploaded build layout. The table assignment algorithm depends on these locations.



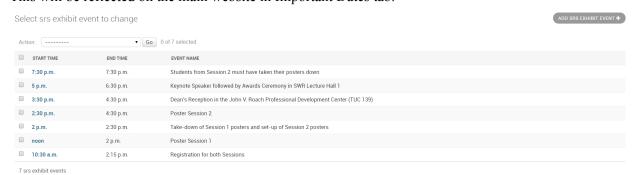
L. Speakers button allows administrator to add the new speaker each year.



M. Srs committee members button allows the administrator to add/remove SRS Committee members.



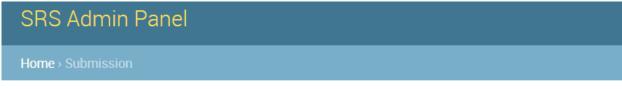
N. **Srs exhibit events** button allows the administrator to modify the event times on the day of SRS. This will be reflected on the main website in Important Dates tab.



O. Years button lets the administrator add the current year for the event.

### 5.2 Dean's Office

User's from the Dean's office have the responsibility to generate name badges and reports involving authors and their guests. This is the portal they will see after logging in.

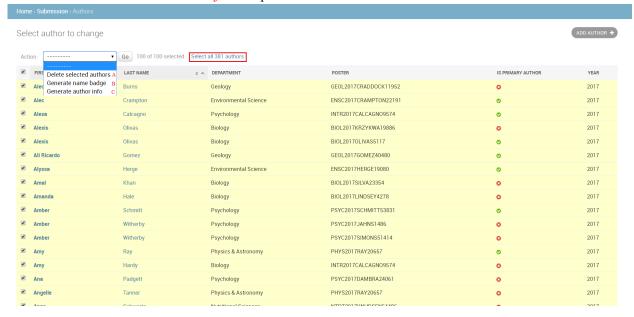


#### Submission administration



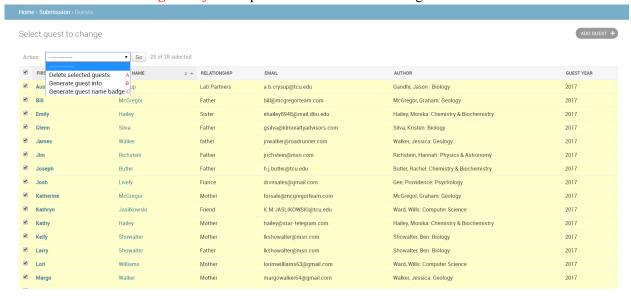
### 5.2.1 Author management

- 1. Click on **Authors** button.
- 2. Choose the author(s) to take action upon then select an action in the box (user can choose everyone by clicking select all):
  - A. Delete selected authors: delete authors being selected.
  - B. Generate name badge: generate name badges of selected authors in PDF format.
  - C. Generate author info: compile information of selected authors into an excel file.



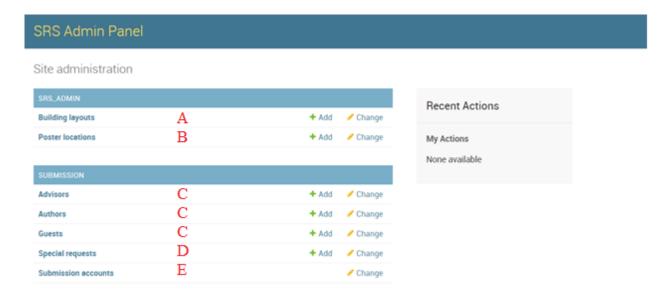
#### 5.2.2 Guest management

- 1. Click on Guests.
- 2. Choose the guest(s) to take action then select an action in the box (user can choose everyone by clicking select all):
  - A. Delete selected guests: delete selected guests.
  - B. Generate guest name badge: generate name badges of selected guests in PDF format.
  - C. Generate guest info: compile information of selected guests into an excel file.

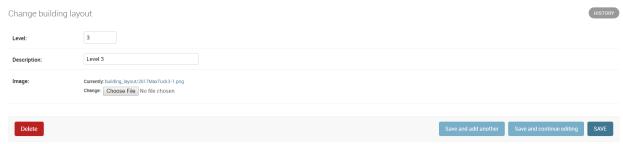


### **5.3 Table Coordinator**

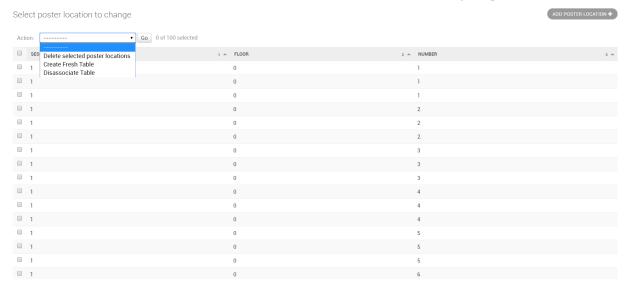
The table coordinator's responsibility is to manage the table assignment, as well as modify the submission accounts. This is the portal they will have when they login.



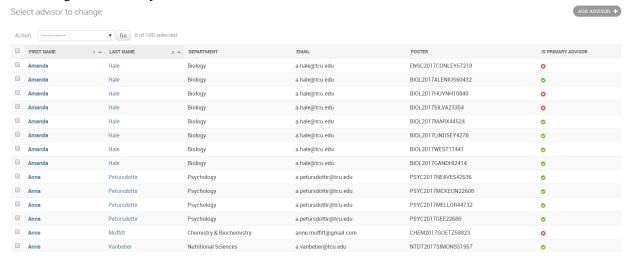
A. **Building layouts** button allows the administrator to change the picture representing the location of posters on the day of SRS. The administrator can upload other files so that authors will know the locations of their posters.



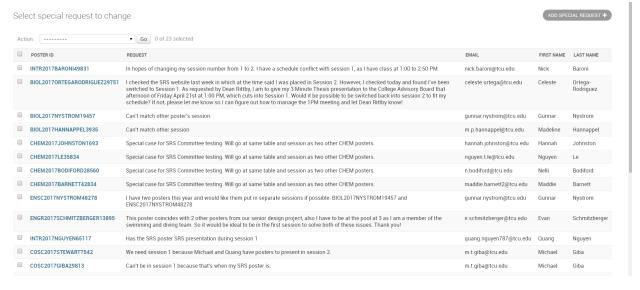
**B.** Poster locations button allows the administrator to see all the poster locations and sessions. They can choose to delete a location or disassociate the location for its current assigned posters.



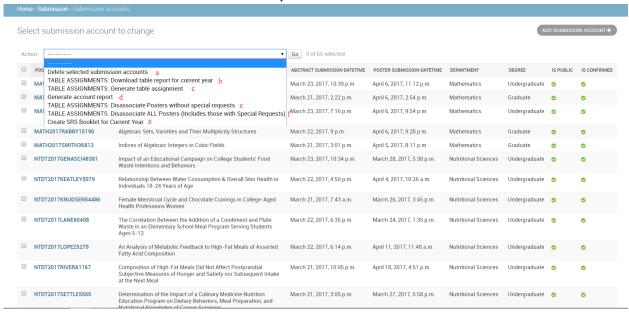
C. Advisor/Author/Guest buttons allow the administrator to see the list of advisor/author/guest and make changes if necessary.



D. **Special request** button allows the admin to look at the special requests made by students. They can verify the requests and decide whether or not to grant the special request.



- E. Submission Accounts button will bring the admin to the account submission lists with the actions they can do:
  - a. **Delete selected submission accounts:** delete selected submission accounts.
  - b. TABLE ASSIGNMENTS: Download table report for current year: download the table report for this year in excel format.
  - c. TABLE ASSIGNMENTS: Generate table assignment: assign posters to locations.
  - d. Generate account report: download the information of selected accounts in excel format.
  - TABLE ASSIGNMENTS: Disassociate Posters without special requests: clear out table field of submission accounts that are not associated with a special request.
  - TABLE ASSIGNMENTS: Disassociate ALL Posters (Includes those with Special Requests): clear out table field of all submission accounts. NOTICE: This action should be called at the end of each SRS year after the even has taken place to prepare for the following year.
  - Create SRS Booklet for Current Year: create the SRS booklet for the day of SRS that includes all information about posters.



## 6. Glossary of Terms

**Django** – Django is a high-level Python Web framework that encourages rapid development and clean, pragmatic design.

**Apache** – Apache is an HTTP Server that is robust, commercial-grade, feature-rich, and freely available.