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| AUCD |
| **NIRS v2.0** |
| **User Manual** |
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# Introduction

**Project Scope:**

* Update NIRS Application appearance to improve user interface and user experience.
* Add Center Dashboard landing page.
* Add Email functionality that will be used by Directors and Data Coordinators to communicate with current trainees.

**Terminology:** In this manual we will refer to newly redesign NIRS as NIRS v2.0. The previous version is referred as NIRS v1.0.

**New Functionalities and Enhancements across NIRS v2.0**

1. Responsive layout
2. Anchored horizontal menu
3. HTML5
4. Unique color identifying each dataset
5. Center’s Dashboard
6. Resource Library
7. My Notes
8. Separation of Standard and Custom Reports. Custom Report is now a stand-alone tool.
9. Trainee data set: Quick Email tool (email functionality to be used by Directors and Data Coordinators to communicate with current trainees)
10. Use of new management tool (displayed as 3-dot icon)
11. Sub-menu displayed in two-column format
12. Paging module
13. Option to display selected number of records per page
14. Search datasets over multiple years made available directly on a dataset list page
15. Revised list of columns displaying item information in each dataset

# Key Administrative Contacts

For general Application questions, please contact:

Natalie Martinez

Data Support Manager, AUCD

[nmartinez@aucd.or](mailto:nmartinez@aucd.or)g or (301) 588-8252 ext. 221

If you have technical problems or need to report Application errors, please contact:

Oksana Klimova

Director, Web Services

[oklimova@aucd.org](mailto:oklimova@aucd.org) or (240)821-9378

Or use link “NIRS 2.0 Feedback” located in a footer are of every NIRS page: https://www.surveymonkey.com/r/LCMLGSF

# Login Page

## Overview

Functionality is same though there are differences in appearance. Outdated language about different type of browsers was taken out.

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| **NIRS v1.0** |
| Screen Clipping |

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| **NIRS v2.0** |
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# Dashboard

## Overview

Upon login, in the NIRS v1.0, Center Faculty/Staff accessed the landing page to select the dataset and action they would want to perform.

In NIRS v2.0, upon login, Center Faculty/Staff will lead to a new Dashboard.

Dashboard will provide real-time statistics for each dataset, financial report for the current fiscal year, and access to Resource Library and My Notes sections.

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| **NIRS v1.0** |
| Screen Clipping |

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| **NIRS v2.0** |
| Screen Clipping |

## Permissions

Based on user permission the landing page upon login will be different.

1. Users with permissions Admin (Center Director and Data coordinator(s)) will find following areas:

* First row: list of all datasets with real-time number of records in each.
* Second row: graphical visualization up-to date financial information for current fiscal year (% of total leveraged).
* Third row: Resource Library
* Third row: My Notes

1. Users with permissions Write/Read, Write/Read Only, Assistant, Read Only (Faculty/Staff users):

* First row: list of all datasets with real-time number of records in each.
* Second row: Resource Library
* Second row: My Notes

\*Dashboard will NOT include graphical visualization up-to date financial information.

## New Tool: Resource Library

Resource Library display list of resource items that will be added through the AUCD Content Management System as News/Documents with Type “NIRS Resources”. AUCD will add list of documents that will be recommended by Data Coordinators.

Data Coordinator will be able to select most relevant resource for his/her centers using administrative tool, Resource Library. The Tool is located in the “Administrative” area of NIRS. Data Coordinator can assign display order to each resource.

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| **NIRS v2.0/ Admin/ Resource Library** |
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Selected resources will be display on the Dashboard page, area “Resource Library”.

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| **NIRS v2.0/ Dashboard/ Resource Library** |
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## New Tool: My Notes

The tool, My Notes let’s anyone with NIRS login account create personal notes. Notes can be created, updated and deleted. To add new note, user will click button “New Note”.

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| **NIRS v2.0/ My Notes** |
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# Trainee Dataset

## Overview

The Trainee dataset navigational menu enables users to manage trainees’ records and view reports-both standard and customized.

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| **NIRS v1.0 Trainees Dataset** |
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| **NIRS v2.0 Trainees Dataset** |
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## What’s New in Trainee dataset, NIRS v2.0

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| --- | --- |
| Sub-Nav menu | Two columns:  Left:  MANAGE DATASET   * Add Long Term/Medium Term Trainee * Add Short Term Trainee * Manage Long/Medium Term Trainees * Manage Short Term Trainees – NEW option in menu * Email Template Manager – NEW option in menu, relate to the new Tool “Quick Email”   Right:  VIEW DATA   * Standard Reports – NEW separate page * Custom Reports – NEW separate page * Survey List |
| Quick Email Tool | Quick Email Tool exists only for Long/Medium Trainees and available from page Manage Long/Medium Terms Trainees:    By selecting checkboxes, administrators can add Trainee e-mail addresses into the email recipient field. Administrators can select one of the e-mail templates or send a custom e-mail by manually typing text into the subject line and content fields.  For the 2018-2019 phase, we provide two templates that can be accessed from Email Template Manager page:    Each template allows Center-specific modifications for Subject, From address, Introduction, Footer, and Signature.  We also provide Delivery Report for each template.    Because NIRS is hosted on aucd.org domain, the emails will be sent from [NIRS@aucd.org](mailto:NIRS@aucd.org) only.  There is form field “From” available for customization in both templates.  Value from that field will be added to the “FROM” email address. Trainee will receive email where ”from” address will look like, [NIRS@aucd.org (on behalf of #from#)](mailto:NIRS@aucd.org%20(on%20behalf%20of%20#from). |
| Reports | One page “Reports” in NIRS v1.0 split to two separate pages, Standard Reports and Custom Reports, in NIRS v2.0.  Custom reports for all centers that were created in NIRS 1.0 were moved into NIRS 2.0. |

## Trainee Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

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| Search | In NIRS v1.0 located in the subnavigation menu, “Search”.  In NIRS v2.0 located at the top right corner of the page and renamed to “Advanced Search”.  No functional changes. |
| Add Trainee | In NIRS v1.0 located in the subnavigation menu, “Add Trainee”.  In NIRS v2.0 located the subnavigation menu, “Add Medium/Long Term Trainee”.  No functional changes in the online form “Add medium/Long Term Trainee”. |
| Add Short Term Trainee | In NIRS v1.0 and v2.0 in the subnavigation menu, “Add Short TermTrainee”. |
| List of Trainees | In NIRS v1.0 located in the subnavigation menu, “List/Edit”.  In NIRS v2.0 located the subnavigation menu, “Manage Medium/Long Term Trainee”.  **NEW:** New columns, “Academic Level” and “Discipline” were introduced. Column “City/State” was taken out.  **NEW:** “Paging module”, “Show ##” of records per page (include option “All”) were added to the page. |
| Reports | In NIRS v1.0 there is one page that accommodate Standard and Custom reports.  In NIRS v2.0 there are two separate sections   * Standard reports * Custom Reports |
| Link “SA Results” | This link was renamed to “SA TOOL: how to read results” and moved to the top right location of the section. It’s visible only to Admin users. |
| List Survey | Left without any changes. |
| Survey Instructions | Link moved to the top right location. |
| Dictionary | Link moved to the top right location. |

# Projects Dataset

## Overview

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| **NIRS v1.0 Projects Dataset** |
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| **NIRS v2.0 Projects Dataset** |
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## What’s New in Projects Dataset, NIRS v2.0

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| Sub-Nav menu | Two columns:  Left:  MANAGE DATASET   * Add Projects * Manage Projects   Right:  VIEW DATA   * Standard Reports – NEW separate page * Custom Reports – NEW separate page |
| Reports | One page “Reports” in NIRS v1.0 split to two separate section, Standard Reports and Custom Reports, in NIRS v2.0. |

## Projects Dataset Functionality Comparison NIRS v1.0 and NIRS v2.0

|  |  |
| --- | --- |
| Search | In NIRS v1.0 located in the subnavigation menu, “Search”.  In NIRS v2.0 located at the top right corner of the page and renamed to “Advanced Search”.  No functional changes. |
| Add Project | In NIRS v1.0 located in the subnavigation menu, “Add Project”.  In NIRS v2.0 located the subnavigation menu, “Add Project”.  No functional changes in the online form “Add Project”. |
| List/Edit | In NIRS v1.0 located in the subnavigation menu, “List/Edit”.  In NIRS v2.0 located the subnavigation menu, “Manage Projects”.  **NEW:** Added new column, “Type of Activity”. |
| Reports | In NIRS v1.0 there is one page that accommodate Standard and Custom reports.  In NIRS v2.0 there are two seprate sections   * Stadard reports * Custom Reports |
| Dictionary | Link moved to the top right location. |

# Activities Dataset

## Overview

The Activities dataset can assist users with managing, adding and editing their activities.

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| **NIRS v1.0 Activities Dataset** |
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| **NIRS v2.0 Activities Dataset** |
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## What’s New in Activities Dataset, NIRS v2.0

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| --- | --- |
| Sub-nav menu | Two columns:  Left:  MANAGE DATASET   * Add Activity * Manage Activities   Right:  VIEW DATA   * Standard Reports * Custom Reports |
| Reports | One page “Reports” in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0. |

## Activitites Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

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| Search | NIRS v1.0-found in the subnavigation under the Activities Header.  NIRS v2.0- “Advanced Search “, link found in the upper right hand corner of the dataset view. |
| Add Activity | NIRS v1.0- found in the subnavigation under the Activities header.  NIRS v2.0- found in the subnavidation under the Activities header.  No functional change. |
| List/Edit | In NIRS v1.0 located in the subnavigation menu, “List/Edit”.  In NIRS v2.0 “List/Edit” was renamed to “Manage Activities”.  No functional change. |
| Reports | In NIRS v1.0 there is one page that accommodate Standard and Custom reports.  In NIRS v2.0 there are two seprate sections   * Stadard reports * Custom Reports |
| Dictionary | Link moved to the top right location. |

# Products Dataset

## Overview

The Products dataset assist users with managing, adding and editing their products and publications.

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| **NIRS v1.0 Products Dataset** |
| Screen Clipping |

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| **NIRS v2.0 Products Dataset** |
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## What’s New in Products Dataset, NIRS v2.0

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| --- | --- |
| Sub-nav menu | Two columns:  Left:  MANAGE DATASET   * Add Product * Manage Products * Product Dissemination   Right:  VIEW DATA   * Standard Reports * Custom Reports |
| Reports | One page “Reports” in NIRS v1.0 split to two separate section, Standard Reports and Custom Reports, in NIRS v2.0. |
| Products List page | Column “ID” was removed. |

## Products Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

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| Search | NIRS v1.0-found in the subnavigation under the Products Header-  NIRS v2.0- “Advanced Search”, it located in the upper right hand corner of the dataset view.  No functional change |
| Add Product | NIRS v1.0- found in the subnavigation under the Products header  NIRS v2.0- found in the subnavigation under the Products header  No functional changes. |
| List/Edit | In NIRS v1.0 located in the subnavigation menu, “List/Edit”.  In NIRS v2.0 “List/Edit” was renamed to “Manage Product”.  No functional changes. |
| Product Dissemination | NIRS v1.0- found in subnavigation under the Products header  NIRS v2.0- found in subnavigation under the Products header.  No functional changes. |
| Dictionary | Link moved to the top right location. |

# Goals Dataset

## Overview

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| **NIRS v1.0 Goals Dataset** |
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| **NIRS v2.0 Goals Dataset** |
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## What’s New in Goals Dataset, NIRS v2.0

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| --- | --- |
| Sub-nav menu | Two columns:  Left:  MANAGE DATASET   * Add Goal * Manage Goal   Right:  VIEW DATA   * Standard Reports * Custom Reports |
| Reports | One page “Reports” in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0. |

## Goals Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

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| Search | NIRS v1.0-found in the subnavigation under the Goals Header-  NIRS v2.0- “Advanced Search “, located in the upper right hand corner of the dataset view.  No functional changes. |
| Add Goals | NIRS v1.0- found in the subnavigation under the Goals header.  NIRS v2.0- found in the subnavidation under the Goals header.  No functional change. |
| List/Edit | In NIRS v1.0 located in the subnavigation menu, “List/Edit”.  In NIRS v2.0 “List/Edit” was renamed to “Manage Goals”.  No functional changes. |
| Dictionary | Link moved to the top right location. |

# Directory

## Overview

The Directory section assist users with managing Center information, Center faculty/Staff records that published in AUCD online Directory for UCEDD and LEND Centers. Also, provide ability to run staff reports.

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| **NIRS v1.0 Directory** |
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| **NIRS v2.0 Directory** |
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## What’s New in Directory, NIRS v2.0

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| Sub-nav menu | Two columns:  Left:  MANAGE DATASET   * Manage Center Info * Add Faculty/Staff Profile * Staff Profile * Manage Faculty/Staff Profiles   Right:  VIEW DATA   * Directory Dashboard * Standard Reports * Custom Reports |
| Reports | One page “Reports” in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0. |

## Directory Functionality Comparison NIRS v1.0 and NIRS 2.0

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| Dashboard | NIRS v1.0-Click on the Directory > Dashboard and it will take the user to a Mange Center Info page.  NIRS v2.0- Link “Dashboard” was renamed into “Manage Center Info”.  No functional changes. |
| Add Contact | NIRS v1.0- found in the subnavigation under the Directory header, Add Contact.  NIRS v2.0- found in the subnavigation under the Directory header, Add Faculty/Staff Profile.  No functional changes. |
| Faculty/Staff | NIRS v1.0- Page enables users to edit, delete or save changes to a Faculty/Staff record.  NIRS v2.0- Page enables users to edit, delete or save changes to a Faculty/Staff record. Page was renamed to “Manage Faculty/Staff Profiles”.  No functional changes. |
| Directory Dashboard | Anchored link to the Search Staff profiles on page Mange Center Info. |
| Search Directory | Link created at the top right location. |
| Dictionary | Link moved to the top right location. |

# Admin

## Overview

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| **NIRS v1.0 Admin** |
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| **NIRS v2.0 Admin** |
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## What’s New in Admin, NIRS v2.0

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| Sub-navigation | The navigation has changed for the Admin dataset. The navigation is split into 2 columns.  Left:  MANAGE DATASET   * Manage Activity Staff * Manage NIRS User Logins * Ownership Transfer   Right:  VIEW DATA   * Program Performance Reports * Reports * Import * Export * Manage User-Defined Fields * CARES Evaluations * Resource Library |
| Change Password | The change password function was moved and now located in profile menu, in the upper right hand corner by clicking on the person icon. |
| Tab in the main menu “Modules” | NIRS v1.0 - found in the main navigation area  NIRS 2.0 – tab was folded in to Admin section and now there is a seprate subnavigation item in the Admin section, CARES Evaluations. |
| New tool: Resource Library | Data Coordinator will be able to select most relevant resource for his/her centers using administrative tool, Resource Library. Tool located in the “Administrative” area of NIRS. Data Coordinator can assign display order to each resource. |

## Admin Functionality Comparison NIRS v1.0 and NIRS 2.0

|  |  |
| --- | --- |
| Change PW | NIRS v1.0-found in the Admin section  NIRS v2.0- Move under the User icon navigation menu (Profile menu) |
| Activity Staff | NIRS v1.0-found in the Admin section.  NIRS v2.0-found in the Admin section, with new header “Manage Activity Staff”  No functional changes. |
| Projects and Orders | Was eliminated completely because functionalities were discontinued three years ago. |
| Import | NIRS v1.0- found in the Admin section.  NIRS v2.0- found in the Admin section.  No functional changes. |
| Export | NIRS v1.0- found in the Admin section.  NIRS v2.0- found in the Admin section.  No functional changes. |
| Reports | NIRS v1.0- found in the Admin section.  NIRS v2.0- found in the Admin section. PPR reporting was moved to a stand-alone page. There are seprate subnavigation item in the Admin section, Program Performance Reports (PPR).  No functional changes. |
| User Logins | NIRS v1.0- found in the Admin section under the subheader “User Logins”  NIRS v2.0- found in the Admin section under the subheader “Manage NIRS Users Login”  No functional changes. |
| Misc Fields | NIRS v1.0- in the Admin section under the subheader “Misc Fields”  NIRS v2.0- in the Admin section under the subheader “Manage User Defined Fields”.  No functional change. |
| Ownership Transfer | NIRS v1.0- in the Admin section under the subheader “Owners”  NIRS v2.0- In the Admin section under the subheader “ Ownership Transfer”.  No functional changes. |

# Profile

## Overview

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| **NIRS v1.0 Profile** |
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| **NIRS v2.0 Profile** |
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## What’s New in Profile, NIRS v2.0

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| New Profile Menu | User can find the menu in the upper right hand corner by clicking on the person icon.  Menu includes:   * Profile * Change password * User Guide * Logout |

## Profile Functionality Comparison NIRS v1.0 and NIRS 2.0

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| --- | --- |
| Profile | NIRS v1.0-found in the subnavigation under the NIRS menu item.  NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon.  No functional changes. |
| Change Password | NIRS v1.0- found in the Admin section.  NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon.  No functional changes. |
| User’s Guide | NIRS v1.0- found in the subnavigation under the NIRS menu item.  NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon.  No functional change. |
| Logout | NIRS v1.0- found as a seprate tab in the menu.  NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon.  No functional change. |