



CIODM

User

Guide

3.9.1

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1. Introduction

Setting Your Browser for the ODM

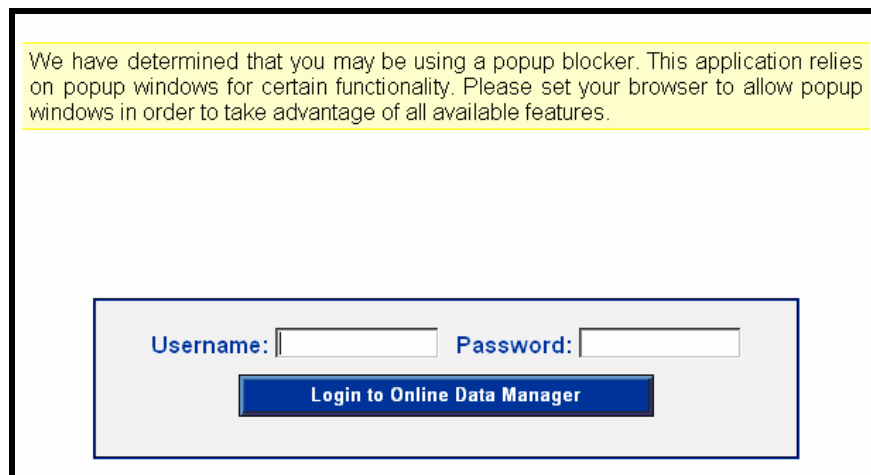
Welcome to the CTK CIODM User Manual.

Before using the ODM, it is important to set your internet browser settings to correctly utilize the ODM interface.

1.1 Pop Up Blocker Protection

Several tools in the CTK ODM are dependant on “popup” windows. These are separate windows that open up on top of the page that the user is viewing. For some users, these tools are not available, due to the installation of Popup Blockers on their computer.

With that in mind, CTK has a **Popup Blocker Detection** system. When a user goes to the login page, and a Popup Blocker is detected for that site, a message will appear on the login screen, requesting that the user turn off popup blockers for the CTK site. It is not expected that popup blockers be removed from the user’s computer completely.



This message will not appear once the popup blocker has been disabled for this site. Please keep in mind also, that popups can be blocked for only certain sites.

1.2 Turning Off Popup Blockers

There are many different pop-up blockers on the market, although they all usually change something in the bottom right hand corner of the Microsoft Internet Explorer or Mozilla Firefox window to indicate when a pop-up is being blocked.

Possible pop-up blockers:

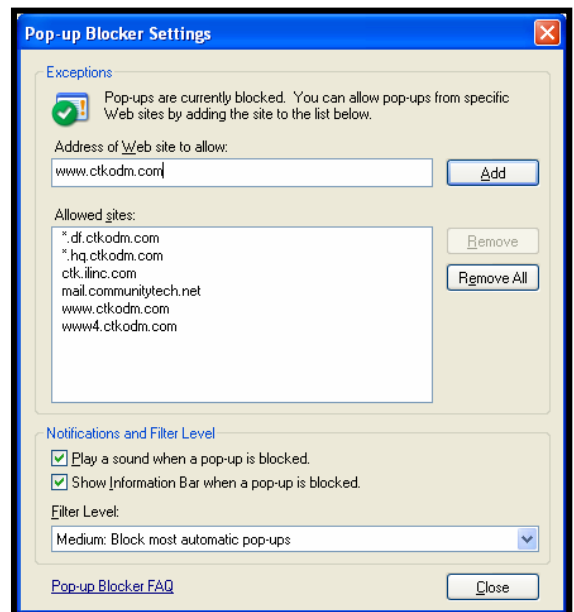
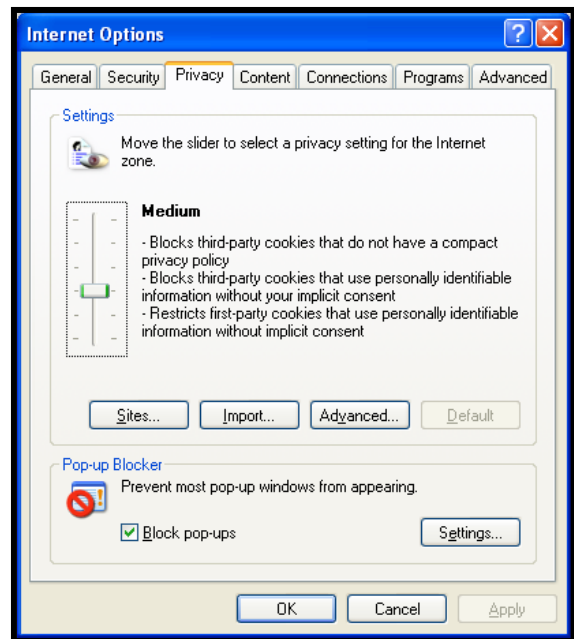
It could be that the computer has **Windows XP Service Pack 2**, which automatically adds a pop-up blocker to **Internet Explorer**. This pop-up blocker can be adjusted as follows:

Open up **Internet Explorer**, and click on Tools at the top of the window. Then select Internet Options at the bottom of the menu.

Select the Privacy tab at the top. Toward the bottom of this tab there is a section for pop-up blocking, for a user who has Service Pack 2.

Click the Settings button in the bottom right of this section. In the new window, Pop-up Blocker Settings, type in "www.ckodm.com" in the field in the middle of the section for adding sites to accept pop-ups from. Then click the "Add" button.

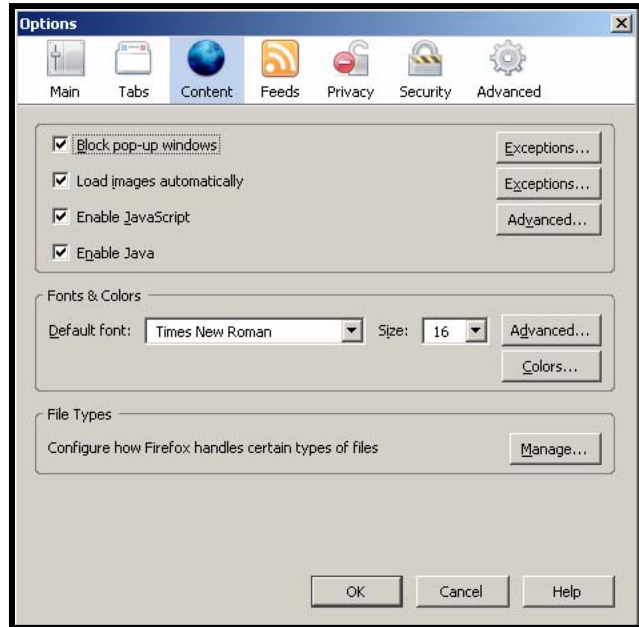
When "www.ckodm.com" is seen in the list of sites, click close. This will take the user back to the Privacy tab in Internet Options.



At the very bottom, click "Apply" if it is in black and then click "Ok."
Mozilla Firefox - To check that JavaScript and pop-ups are enabled:

Open a Firefox window and click on Tools at the top. Then select Options.

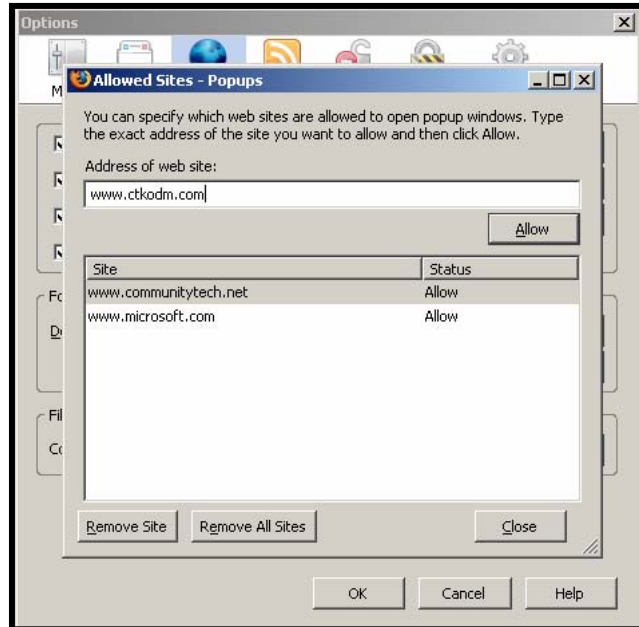
In the Options window that appears, select "Content," as shown to the right. You may block popup windows from other websites and continue using your ODM by clicking the button "Exceptions."



A new window will appear. From here you may add any website you wish. Start with www.ckodm.com and hit "Allow."

It will appear in the list below. Once you have your complete ODM website, add that as well. Such as:
www.ckodm.com/Your ODM.

After adjusting these options, click OK to save the changes and close the Options window.

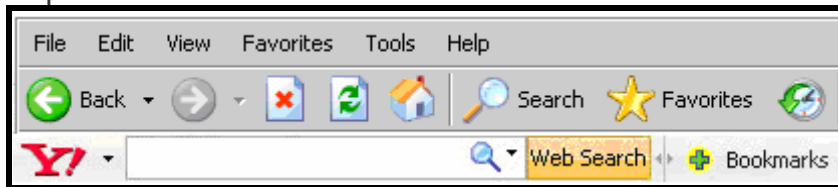


Yahoo and **Google** have popular pop-up blockers, which are tied to toolbars.

To adjust these toolbars:

If a user has the Yahoo toolbar at the top of Internet Explorer, there will be a big red "Y" button and numerous other colorful buttons, one of which will disable the pop-up blocker. Unfortunately, CTK cannot verify which button, as they change the icon with each version.

Explorer:

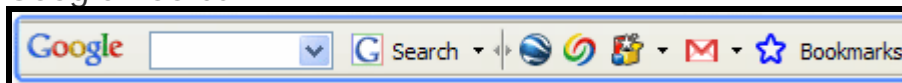


Firefox:



The Google toolbar includes a small Google search window and several other functions. To disable this pop-up blocker, click on the "Options" button. Unfortunately, CTK cannot verify the Google options button, as they change the icon with each version.

Google Toolbar:



1.3 Browser Settings and Configuration

To effectively utilize the ODM, it is important to access the internet using Microsoft Windows Explorer version 6.0 or higher. All users of the ODM must also have 128-bit encryption, to maintain the highest level of security for your data. If the computer's browser is not 6.0 or higher, or does not have 128-bit cipher strength, it can be downloaded for free from Microsoft at

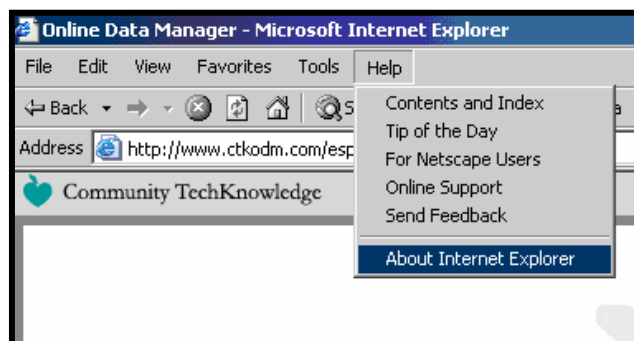
<http://www.microsoft.com/windows/downloads/ie/getitnow.mspx>

NOTE FOR EXPLORER 7 USERS:

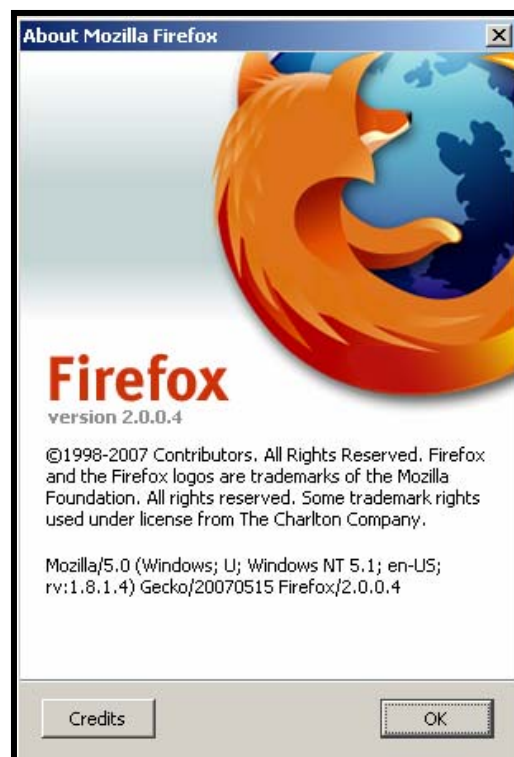
Currently, the ODM program has some minor browser issues with IE 7. The program functions and works correctly, but a few windows are difficult to read. CTK is committed to working with Microsoft products for complete operability.

Full compatibility is expected by Fall, 2007.

If unsure as to which browser version is being used, log onto the internet. While the browser is open, click on the "Help" menu. At the bottom is a choice labeled "About..." followed by whichever browser you use.

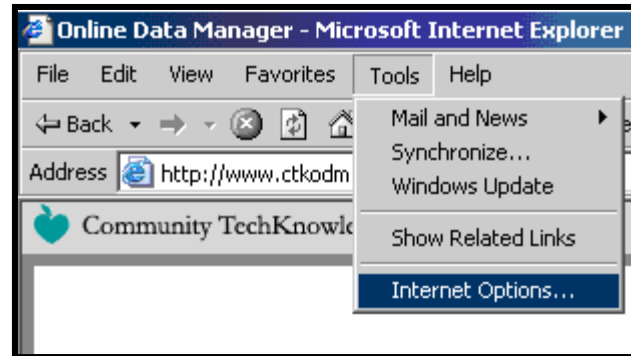


A pop-up window will appear with the version of the browser you are using. Explorer will show the cipher strength as well. Firefox supports up to 256-bit encryption, and is safe to use, but has other pitfalls this manual will discuss in the next section.

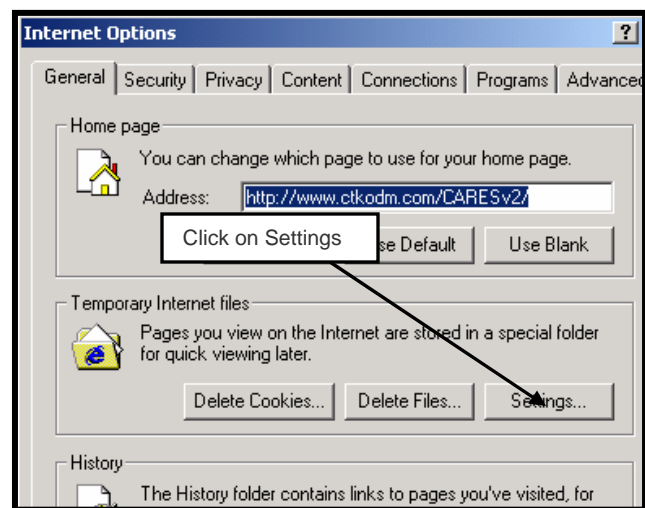


1.4 Caching

To ensure that a user is looking at the most current data available, it is important that the caching be set correctly. While the browser is open, click on Tools and select Internet Options from the drop list.

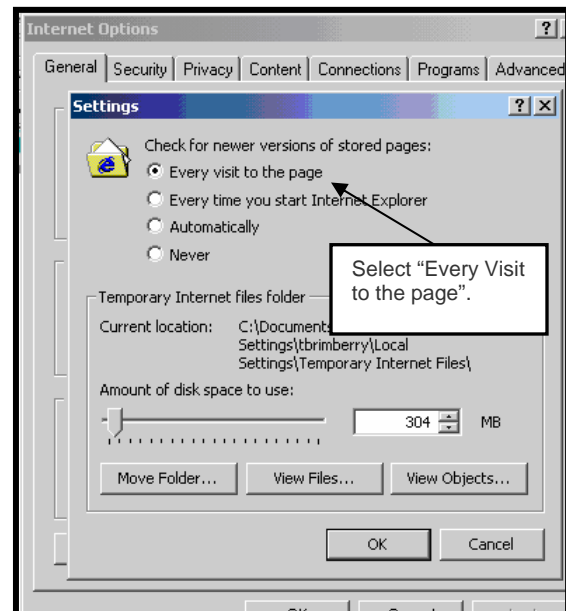


The Internet Options Box will open. Select the General Tab (usually the default tab). The middle section is titled Temporary Internet Files.



Click on the "Settings" button in that section.

When the settings box opens, be sure that Every Visit to the Page is selected from the options listed. This allows the web browser to automatically update and show any changes made to a page.



Once the setting has been changed, click on OK. This will take the user back to the Internet options box (visible just behind the "Settings" box).

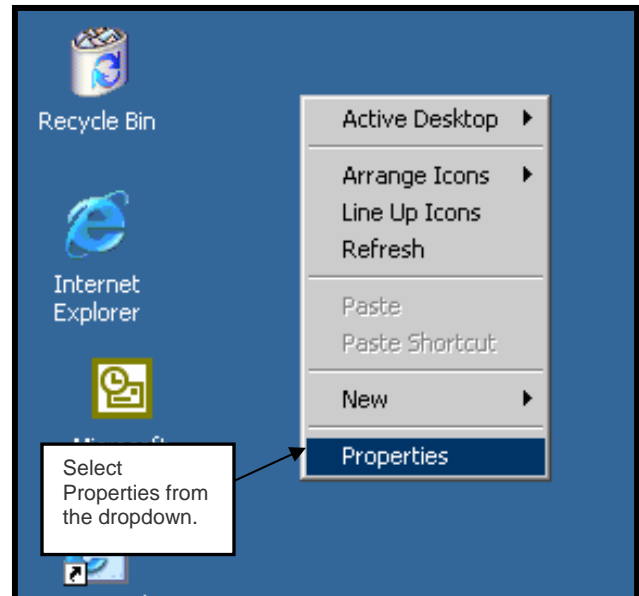
Click OK again to close out the Internet Options box.

1.5 Screen Area

For the best viewing of the ODM, it is recommended that a user set the resolution on the screen to 800 x 600 or above.

However, this can vary depending on the type of monitor being used. Many modern monitors are in a “widescreen” format, or function at a higher resolution than 800 x 600.

To change the screen resolution, right click on the desktop. This will open the Desktop Properties window.

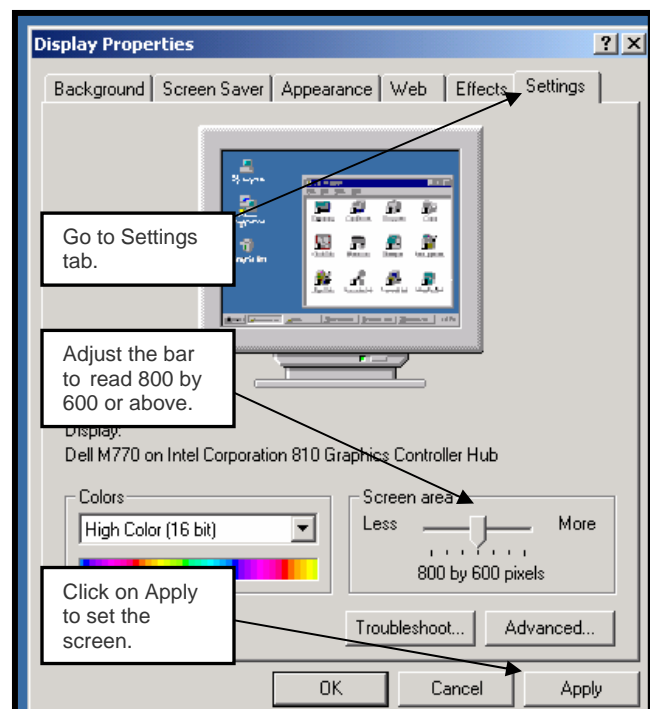


Another way to the Display Properties window is through the start button. Then, select Settings, then Control Panel, and then the Display icon.

Either way you choose, after opening the Display Properties window, select the Settings tab.

On the settings tab, go to Screen Area. Move the screen resolution bar to read 800 by 600, or the appropriate setting for the computer.

Click “Apply.”



1.6 Printer Settings

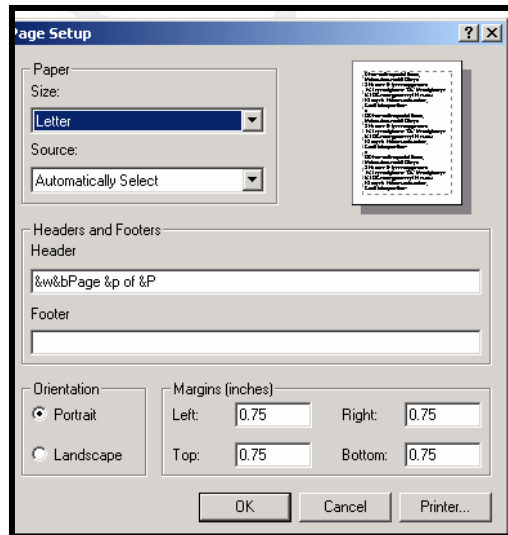
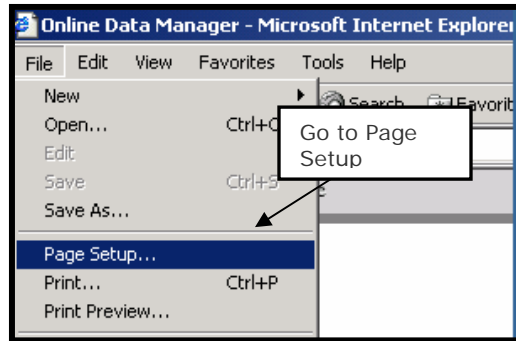
When printing items from the Internet, unless the headers and footers are cleared, the Internet site's URL and other identifying information will appear on the top and bottom of the printed page.

To clear these headers and footers, go to File, and select Page Setup from the drop down menu.

On the Page Setup window, there is a Headers and Footers section. Delete the information that is entered into both of these text boxes.

Select OK to save the changes.

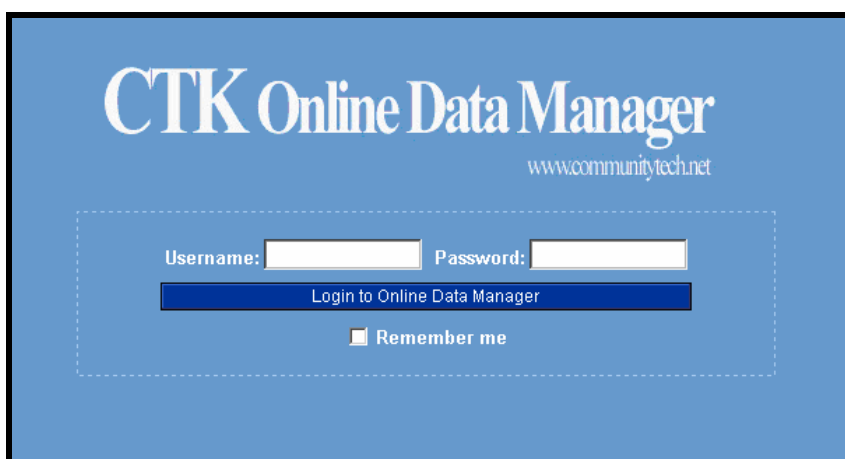
THIS CONCLUDES THE CHAPTER ON SETTING UP YOUR BROWSER FOR THE CIODM.



2. Accessing Your ODM

2.1 ODM URL Address

The URL address for an organization is unique to that organization. The URL will start with www.ckodm.com/, and will include the identifying organization name at the end, such as www.ckodm.com/Your Organization. This link will take the user to the ODM login screen.



2.2 Logging on the ODM

CTK has designed the ODM to be a completely secure repository for an organization's confidential records. A user will need a Username and Password to access the ODM.

Usernames and Passwords

Usernames and Passwords are created and assigned by the organization's ODM System Administrator, and are unique to each individual user. These names and passwords are case sensitive. The System Administrator also determines the level of access a user will have, as well as special requirements for passwords, such as having special characters or a minimum password length.

Unique User Profiles

Unique user profiles can be established in the ODM for every user. These are User Groups that allow a specific group of users to have access to certain tools and forms.

User Profiles are used for various reasons, including:

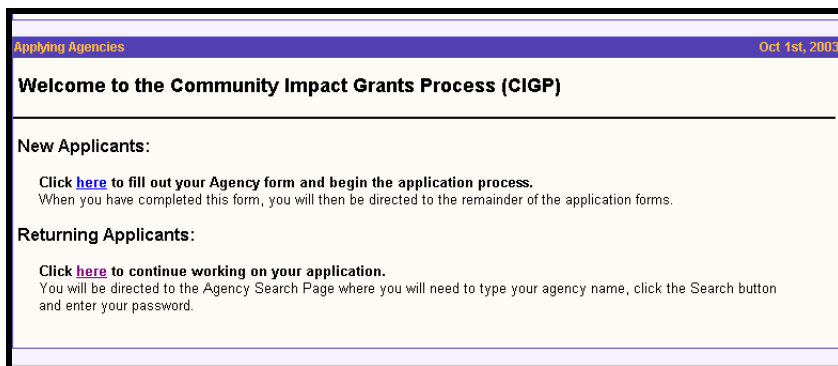
Security and confidentiality. The User Profile both restricts and gives permission to access various areas of the ODM to certain users. Which areas a user may access, and what they may do there, are granted by the ODM System Administrator. Password changes and updates are also determined by the Administrator.

Simplicity and Accessibility. The User Profile has been created for each user. A user will only see menu options that are relevant to that user's day-to-day responsibilities.

Once a user has entered the Username and Password, click the Login to Online Data Manager button.

2.3 Grant Bulletin

Once logged in, there will be a bulletin with links to the **Grant Application**. This example is a sample bulletin; the specific wording will vary from organization to organization.



Within the bulletin there are two ways to access the Grant Application. One way is as a **New Applicant** and the second way is as a **Returning Applicant**. New Applicant simply means that the applicant has not yet started the Grant Application on the CI ODM.

Returning Applicant refers to those who have either already started the application process, or have applied before.

The screenshot shows a web application interface for 'Applying Agencies' dated Jan 24th, 2004. The interface is divided into several sections:

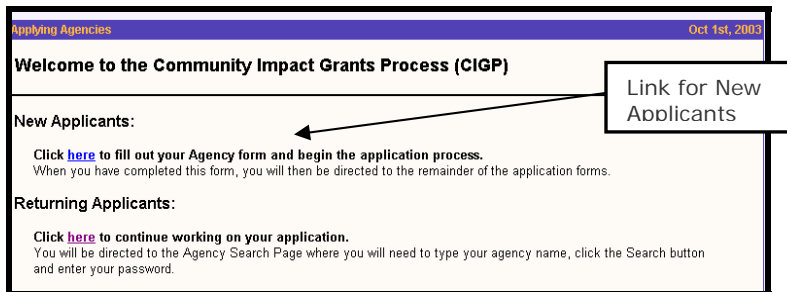
- Left Sidebar:** Contains navigation links such as 'Welcome, Applying Agency', 'MyODM Home', 'My Preferences', 'My Files', and 'My Links'. The 'My Files' section lists 'CIGP Guidelines', 'Community Response', and 'Outcomes Training Calendar 2004'. The 'My Links' section lists 'Grant Application Instructions', 'Measuring Outcomes - Appendix', 'Measuring Outcomes - Phase 1', 'Measuring Outcomes - Phase 2', and 'Measuring Outcomes - Phase 3'.
- Main Content Area:** Titled 'Application Documents', it contains a message: 'Applying Agencies, the CIGP Guidelines document and other application instruction documents are available for download on the left-hand side of this screen in the My Files box.' Below this is an Adobe Reader logo and a note about downloading PDFs.
- Right Sidebar:** Titled 'Applying Agencies', it contains a box labeled 'Grant Application Information' with an arrow pointing to the 'Grant Application Instructions' link in the sidebar.
- Bottom Section:** Titled 'Applying Agencies', it contains instructions for 'New Applicants' and 'Returning Applicants'. The 'Returning Applicants' section includes a link to continue working on an application and a note about the Agency Search Page.

A large black oval is drawn around the 'Grant Application Instructions' link in the sidebar and the 'Returning Applicants' section in the main content area.

3. Grant Application

3.1 New Applicant

A **New Applicant** will click on the corresponding link, which will take the applicant to the first form in the application process.



In this example, the form is titled "Agency". The Applicant is directed to enter a **Password** in the space provided. This password will be utilized when the Applicant returns to continue the Grant Application process. In addition, the applicant is instructed to leave the **Application Status** to Draft, until the entire application is completed.

Once the status is changed to Final, the Applicant will be unable to edit any of the application forms.

AGENCY Duplicate Check Print Save Delete Close

Application Status and Password

PLEASE READ INSTRUCTIONS BELOW BEFORE BEGINNING YOUR APPLICATION

NOTE: You may save your work and return to the grant application as often as needed as long as the APPLICATION STATUS field below says DRAFT.

Once you are finished completing ALL steps of your application, change the APPLICATION STATUS to FINAL and the United Way will be notified to begin reviewing it. Once you change the Application Status to FINAL, you will be able to view and print your application, but not be able to change any data.

Change the status to final once the entire application process is completed

Draft

Pending Review

A password is required, and will be used when returning to complete application.

General Agency Information

Agency Name (*)

Date Agency Incorporated / /

Street Address

Postal Code (*)

Once the form is saved, the Applicant is taken to the **Grant Application Screen**. The Grant Application screen allows the Applicant to easily view and fill out all of the forms that need to be completed for the application process. The screen defaults to a display of **instructions** for the application process.

On the left hand side of the screen, the applicant's **status** is listed, along with a list of all options available to the user for the application process. In addition, there is the ability to see all of the forms in the application process, or to view each form individually. Each of these options will be covered further along in the manual.

Please keep in mind that these are just examples of application forms. Each funding organization will differ in the forms that it uses.

<p>Grant Application</p> <p>Status: Not Yet Submitted</p> <p>Instructions</p> <p>Print Application</p> <p>Submit Application</p> <p>Application Forms</p> <p>Show All Forms</p> <p>Agency Intake</p> <p>Board Profile</p> <p>Board Member</p> <p>Agency Budget</p>	<p>Application Instructions</p> <p>Welcome to the online United Way Agency Application!</p> <p>As you proceed through the following forms, please keep these tips in mind:</p> <ul style="list-style-type: none"> --- Do not change your application status to "Final" until you are absolutely ready to do so. Changing the status will make all the application forms read only. --- Save frequently. Save the form after completing each large section. The system will time out after a form has been opened for more than 55 minutes without being saved. --- Fill out as much information as possible. Forms missing required data will be preceded by an asterisk. <p><i>If you have any questions about the information requested in this application, please contact the United Way staff liaison and they will be happy to help you. Thank you and good luck!</i></p>
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3.2 Returning Applicant

At any point during the application process, the Applicant can return to the CI ODM to continue working on the application. The Applicant enters the CI ODM using the same generic User Name and Password. However, this time, the Applicant clicks on the link for **Returning Applicants**.

The screenshot shows a web page titled "Applying Agencies" with a date of "Oct 1st, 2003". The main heading is "Welcome to the Community Impact Grants Process (CIGP)". Under "New Applicants:", it says "Click [here](#) to fill out your Agency form and begin the application process. When you have completed this form, you will then be able to complete the remainder of the application forms." Under "Returning Applicants:", it says "Click [here](#) to continue working on your application. You will be directed to the Agency Search Page where you will need to type your agency name, click the Search button and enter your password." A callout box labeled "Link for returning!" has an arrow pointing to the "here" link in the "Returning Applicants" section.

The **Returning Applicant** link, takes the Applicant to the **Search Screen**, where the Applicant will search for the Applicant Agency name, and then be prompted to enter the password that was requested on the initial application form.

The screenshot shows a search interface. At the top, it says "I would like to look up a Agency by:" with a dropdown menu set to "Agency Name" and a search criteria field containing "Terra". Below this are "Results Per Page: 25" and "Ascending" dropdowns, and "Search" and "New" buttons. The search results are displayed in a table with two columns: "Agency Identifier" and "Searched Data". The first result is "595 Terra's Clothes Closet" with "Terra's Clothes Closet" in the searched data. To the right, under "Agency Information", the following details are listed: "Agency Name : Terra's Clothes Closet", "Street Address :", "Postal Code : 78755", "City : Austin", "State : TX", and "Main Phone : 603-". An inset window titled "Grant Application Login - Mic..." is overlaid on the search results, showing a login form for "Terra's Clothes Closet" dated "Wed, Oct 06, 2004" with a "Password" field and a "Submit" button.

Once the correct password is entered, the Applicant is taken back to the **Grant Application Screen**. The Applicant can then continue to fill out the required application forms.

Grant Application Status: Not Yet Submitted Instructions Print Application Submit Application Application Forms Show All Forms Agency Intake Board Profile Board Member Agency Budget Supplemental Site Locations Program Application Triangle United Way Program Budget Evidence of Need For Program Basic Logic Model Indicators and Projected Numbers Validity and Reliability of Measurement Tools Attached Document	Application Instructions Welcome to the online United Way Agency Application! As you proceed through the following forms, please keep these tips in mind: --- Do not change your application status to "Final" until you are absolutely ready to do so. Changing the status will make all the application forms read only. --- Save frequently. Save the form after completing each large section. The system will time out after a form has been opened for more than 55 minutes without being saved. --- Fill out as much information as possible. Forms missing required data will be preceded by an asterisk. <i>If you have any questions about the information requested in this application, please contact the United Way staff liaison and they will be happy to help you. Thank you and good luck!</i>
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3.3 Grant Application Tools

The **Grant Application Screen** is made up of several components. When a user first gets to this screen, the **Application Instructions** are displayed, and the available links are listed to the left of the instructions. The instructions are configurable for each CI ODM, and this is just an example.

Application Status

The applicant's status is listed above the links on the left hand side of the screen. The status determines the user's ability to edit the application. Once the status is changed to **Final**, the user will no longer be able to create or edit forms in the application process.

Grant Application
 Status: **Not Yet Submitted**
[Instructions](#)
[Print Application](#)
[Submit Application](#)

Application Forms
[Show All Forms](#)
[Agency Intake](#)
[Board Profile](#)
[Board Member](#)
[Agency Budget](#)
[Supplemental Site Locations](#)
[Program Application](#)
[Triangle United Way Program Budget](#)

Application Instructions
 Welcome to the online United Way Agency Application!

As you proceed through the following forms, please keep these tips in mind:
 --- Do not change your application status to "Final" until you are absolutely ready to do so. Changing the status will read only.
 --- Save frequently. Save the form after completing each large section. The system will time out after a form has been opened for more than 55 minutes without being saved.
 --- Fill out as much information as possible. Forms missing required data will be preceded by an asterisk.

If you have any questions about the information requested in this application, please contact the United Way staff liaison and they will be happy to help you. Thank you and good luck!

Application status is displayed.

Application Instructions

Application **Instructions** are initially displayed on the Grant Application Screen. To return to the instructions while in the Grant Application tool, click on the **Instructions** link.

Grant Application
 Status: **Not Yet Submitted**
[Instructions](#)
[Print Application](#)
[Submit Application](#)

Application Forms
[Show All Forms](#)
[Agency Intake](#)
[Board Profile](#)
[Board Member](#)
[Agency Budget](#)
[Supplemental Site Locations](#)
[Program Application](#)
[Triangle United Way Program Budget](#)
[Evidence of Need For Program](#)
[Basic Logic Model](#)
[Indicators and Projected Numbers](#)
[Validity and Reliability of Measurement Tools](#)
[Attached Document](#)
[Program Year End Report](#)

Application Instructions
 Welcome to the online United Way Agency Application!

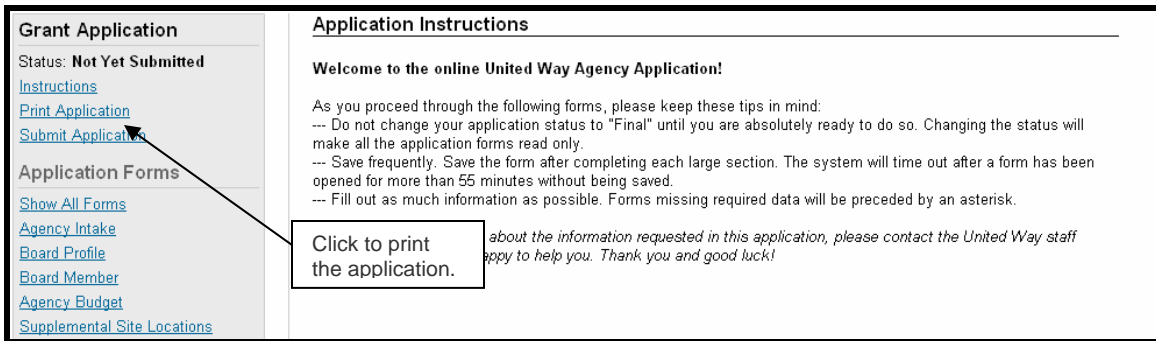
As you proceed through the following forms, please keep these tips in mind:
 --- Do not change your application status to "Final" until you are absolutely ready to do so. Changing the status will make all the application forms read only.
 --- Save frequently. Save the form after completing each large section. The system will time out after a form has been opened for more than 55 minutes without being saved.
 --- Fill out as much information as possible. Forms missing required data will be preceded by an asterisk.

If you have any questions about the information requested in this application, please contact the United Way staff liaison and they will be happy to help you. Thank you and good luck!

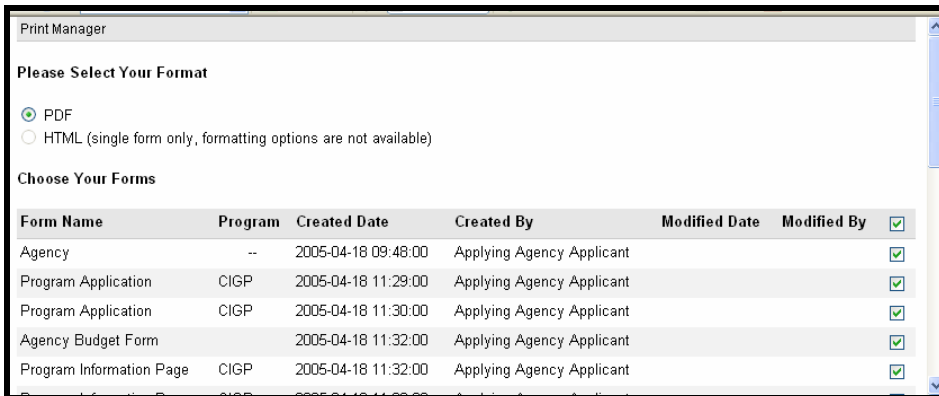
Click here to view the Application Instructions.

Print Application

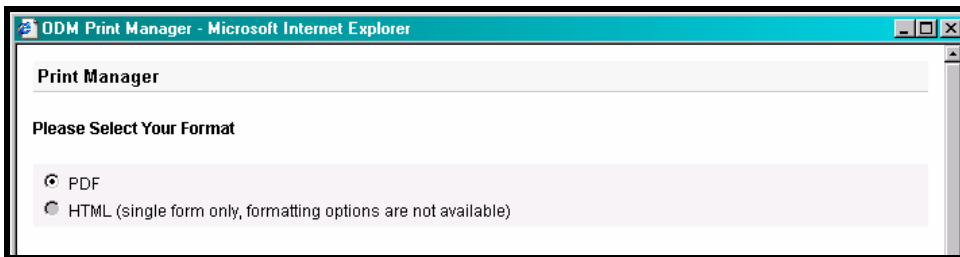
At any point during the application process, the user can **print** the application by clicking on the **Print Application** link.



Clicking on Print Application activates the ODM Print Manager.



Print Format - The first option on the Print Manager is to select the **Print Format**. The two options are **PDF** or **HTML**.



PDF (Portable Document Format) is a universal file format that preserves the fonts, images, graphics, and layout of any source document, regardless of the application and platform used to create it. Go to <http://www.adobe.com/products/acrobat/adobepdf.html> for more information regarding PDFs and to download Adobe Acrobat Reader for free. A User must have Adobe Acrobat Reader to view the form. PDF format can be used with individual forms as well as with multiple forms.

AGENCY

Application Status and Password

PLEASE READ INSTRUCTIONS BELOW BEFORE BEGINNING YOUR APPLICATION

NOTE: You may save your work and return to the grant application as often as needed as long as the APPLICATION STATUS field below says DRAFT. Once you are finished completing ALL steps of your application, change the APPLICATION STATUS to FINAL and the United Way will be notified to begin reviewing it. Once you change the Application Status to FINAL, you will be able to view and print your application, but not be able to change any data.

Application Status	Draft
Review Status	Pending Review
Agency Password	test

HTML (Hypertext Markup Language) is the standard web-format for printing. HTML is only available when printing an individual form. To print multiple forms at one time, the user must use the PDF format.

AGENCY

Application Status and Password

PLEASE READ INSTRUCTIONS BELOW BEFORE BEGINNING YOUR APPLICATION

NOTE: You may save your work and return to the grant application as often as needed as long as the APPLICATION STATUS field below says DRAFT.

Once you are finished completing ALL steps of your application, change the APPLICATION STATUS to FINAL and the United Way will be notified to begin reviewing it. Once you change the Application Status to FINAL, you will be able to view and print your application, but not be able to change any data.

Application Status Draft
 Review Status Pending Review
 Agency Password test

General Agency Information

Agency Name Terra Clothes Closet
 Date Agency Incorporated
 Street Address
 Postal Code 78733
 City Austin
 State TX

Choose Your Forms - The second option in Print Manager is to “**choose your forms**” that need to be printed. The Print Manager displays all the forms in the Application that the User has **permission**

to view. The Print Manager defaults to having no forms selected. The user can select all forms by clicking the top checkbox. Individual forms can be selected or deselected by clicking on the checkbox that corresponds to the specific form.

Please Select Your Format

PDF
 HTML (single form only, formatting options are not available)

Choose Your Forms

Form Name	Program	Created Date	Created By	Modified Date	Modified By	<input checked="" type="checkbox"/>
Agency	--	2005-04-18 09:48:00	Applying Agency Applicant			<input checked="" type="checkbox"/>
Program Application	CIGP	2005-04-18 11:29:00	Applying Agency Applicant			<input checked="" type="checkbox"/>
Program Application	CIGP	2005-04-18 11:30:00	Applying Agency Applicant			<input checked="" type="checkbox"/>
Agency Budget Form		2005-04-18 11:32:00	Applying Agency Applicant			<input checked="" type="checkbox"/>

Check the top box to select all records.

Cover Page - The third option is to set up a **cover page**, if desired. When information is entered into the **Title** and **Body fields**, the Print Manager will generate a cover page displaying the information entered.

Cover Page

Title:

Body:

Choose Your Formatting - With a **PDF**, the user is allowed to make **format decisions** each time a form is printed:

Choose Your Formatting

Page Header:

Page Footer:

Force Pagebreaks?

Include More Info?

Include Empty Fields?

Font:

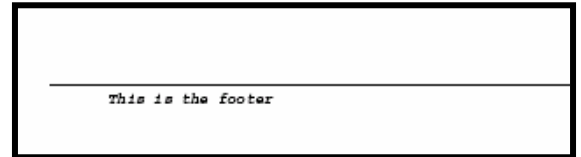
Form Name Text:

Section Name Text:

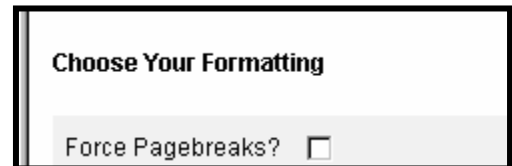
Body Text:

Section Spacing:

Page Header and Footer – Enter information in these text areas to create a line of information that will appear on the top or bottom of each printed page. This could be the date, agency information, etc.



Force Page breaks – If this box is checked, each individual form will print on a separate sheet of paper. If left unchecked, the forms will print out one right after another, without pre-defined page breaks.



Include More Info – If this box is checked, the **Additional Information** (Key Fields from the Primary Form) will print out at the top of every Secondary Form. If the box is not checked, then the **Additional Information** will not print. For example, if the Primary Form is being printing, it might not be necessary to have the Additional Information print on any other forms, since that information is in the Primary Form as well.

Printing With “Include More Info?”

PROGRAM APPLICATION	
Agency Name	: Terra Clothes Closet
Date Agency Incorporated	: 1982-02-02
Street Address	: 805 N. Johnson St.
Suite	300
Postal Code	: 78733
City	: Austin
State	: TX
Website	: www.terra.com
Main Phone	: 603-343-4343
Program Information	

Printing Without “Include More Info?”

PROGRAM APPLICATION	
Program Information	
Funding Cycle	July 2003-July 2005
Program Name	Back to School
Impact Area(s) Being Applied For	[X] Building Strength through Housing & Basic Needs [X] Creating Strong Futures for Children, Youth & Families
For EACH PROGRAM invited to apply for funding Attach FULL Letter of Intent (LOI)	
Resources Needed	

1. **Include Empty Fields** – This option allows for only fields with information entered appearing on the printed form.

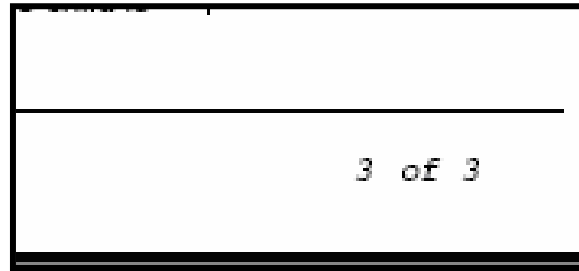
2. **Font** – The Font dropdown allows the User limited selections of desired fonts for the printed forms.

Force Pagebreaks?	<input type="checkbox"/>
Include More Info?	<input type="checkbox"/>
Font:	Arial
Header Text:	Arial
Section Header Text:	Courier-Bold
Body Text:	Courier-Oblique
	Courier-BoldOblique
	Helvetica

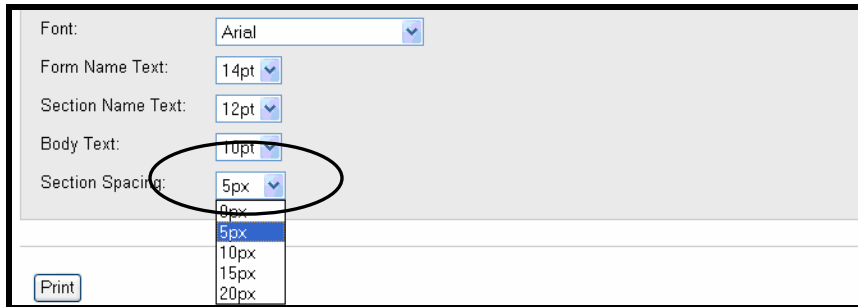
3. **Text Options** – The next four options allow the User to define the text size for the form Header, Section and Body. The default settings are 14pt, 12pt and 10pt, respectively.

Form Name Text:	14pt
Section Name Text:	12pt
Body Text:	10pt
Section Spacing:	5px

4. **Page Number** – The Print Manager will automatically insert page numbers at the bottom right-hand side of every page (not including the cover page).



5. **Section Spacing** - This option allows the user to control the amount of space that appears between sections when printing forms.



The default setting is 5px, but the setting can be set anywhere from 0px to 20px. The 0px option provides to space at all, and the 20px option allows for the maximum amount of spacing.

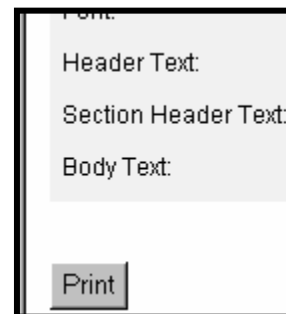
Opx

Medicaid Number	
Social Security Number	343-43-4343
DFPS Client Number (2085 number)	
Facility ID (where the child is currently placed)	
Home ID	5
Level of Care	
Current Level of Care	
LOC Effective Date	
LOC Expiration Date	
LOC History	
Assignments	
Case Manager	
CM Assignment Date	

20px

Medicaid Number	
Social Security Number	343-43-4343
DFPS Client Number (2085 number)	
Facility ID (where the child is currently placed)	
Home ID	5
Level of Care	
Current Level of Care	
LOC Effective Date	
LOC Expiration Date	
LOC History	
Assignments	
Case Manager	
CM Assignment Date	
Therapist	
Therapist Number (if not agency employee)	
Therapist Assignment Date	

Once all of the desired print options have been selected, click on **Print**. When the forms have been printed, the User will be returned to the Record Folder.



Form:

Header Text:

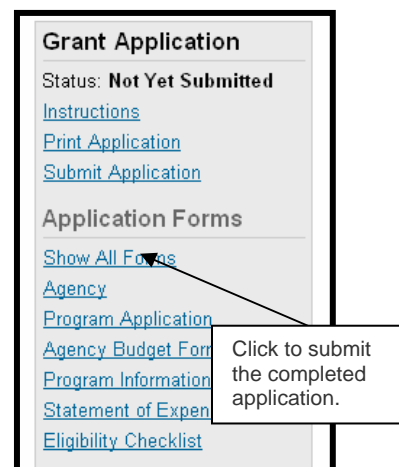
Section Header Text:

Body Text:

Print

Submit Application

The next option on the Grant Application screen is **Submit Application**. This is done after the application is **complete**.



Grant Application

Status: **Not Yet Submitted**

[Instructions](#)

[Print Application](#)

[Submit Application](#)

Application Forms

[Show All Forms](#)

[Agency](#)

[Program Application](#)

[Agency Budget Form](#)

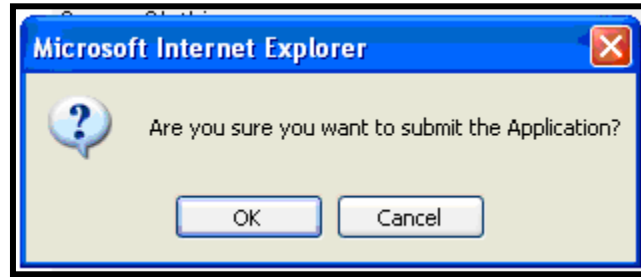
[Program Information](#)

[Statement of Expenses](#)

[Eligibility Checklist](#)

Click to submit the completed application.

Once Submit Application is selected, a box appears that verifies that the application is **ready for submission**. Once an application is submitted the user will not be able to edit it, and will only have the ability to view or print the application. In addition, an **email notification** will be sent to the funding organization, notifying them of the status change.

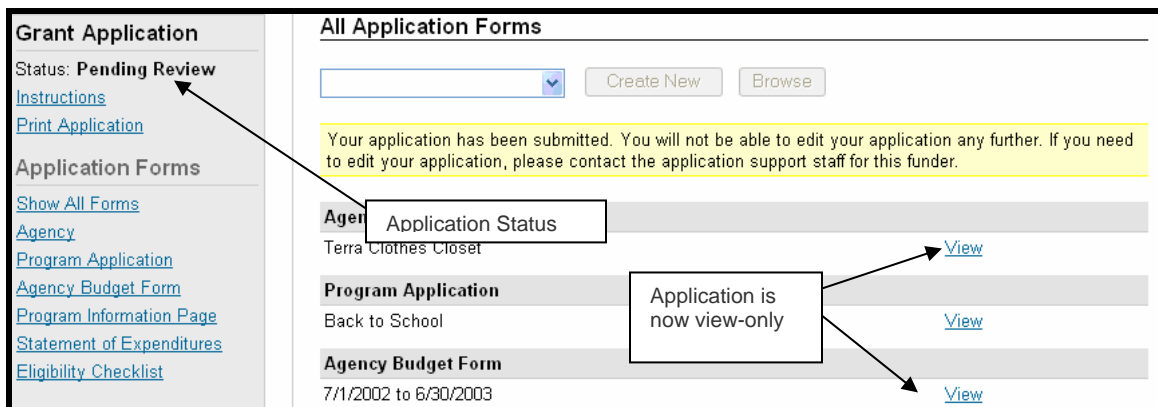


If an application is inadvertently submitted, the user must contact the funding organization to have the status changed back to **“Not Yet Submitted”**.

Submitted Application

Once an application has been submitted, the user can continue to log into the ODM to **view** the existing application, but will not be allowed to edit any of the forms. They will all be listed as “View”. This will allow the user to view the forms and print out the application.

Application Status is posted in the upper left-hand side of the screen.



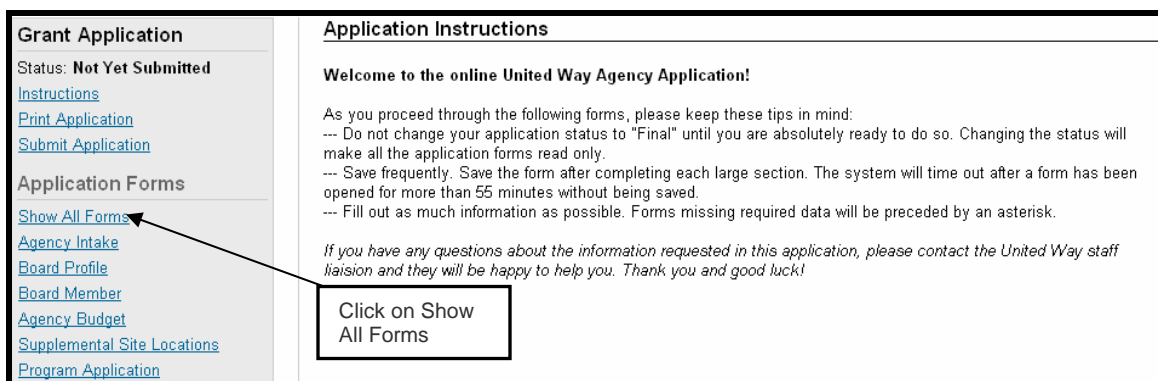
THIS CONCLUDES THE CHAPTER ON GRANT APPLICATIONS.

4. Application Forms

On the left hand side of the screen under **Application Forms**, there is a link for **Show All Forms** and underneath is a link to every individual form that is part of the application process.

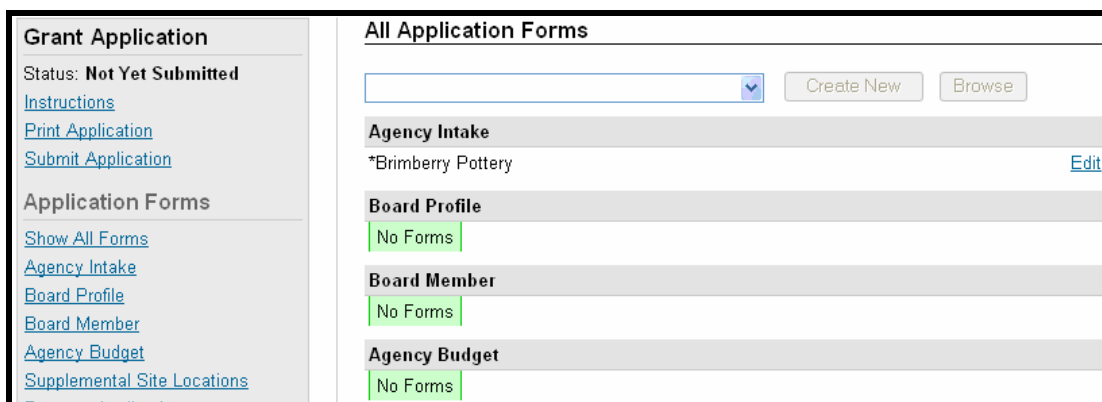
4.1 Show All Forms

Click on **Show All Forms** to choose from a list of all forms that are part of the application process.



The screenshot shows a web interface with a sidebar on the left and a main content area. The sidebar has a section titled "Application Forms" with several links: "Show All Forms", "Agency Intake", "Board Profile", "Board Member", "Agency Budget", "Supplemental Site Locations", and "Program Application". An arrow points from a callout box containing the text "Click on Show All Forms" to the "Show All Forms" link. The main content area is titled "Application Instructions" and contains a welcome message and several instructions for users.

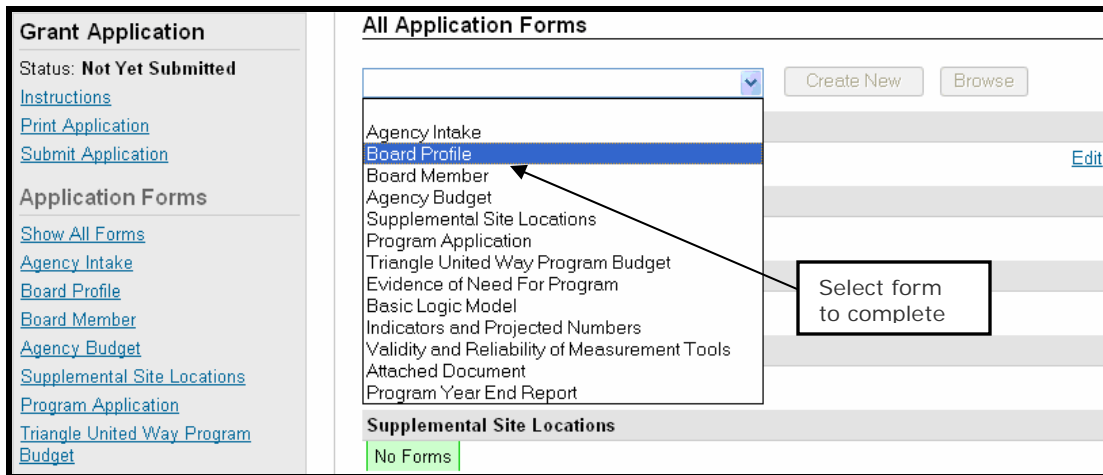
This will take the user to a screen where all the forms are listed, along with the ability to **create** or **edit** the forms. Until additional forms are completed, the only option is to "Edit" the Agency form. "**No Forms**" is displayed under all of the other forms, until at least one is completed.



The screenshot shows a web interface titled "All Application Forms". At the top, there is a search bar and two buttons: "Create New" and "Browse". Below this, there is a list of forms categorized by type. The categories and their status are: "Agency Intake" (with a link to "Edit" and the text "*Brimberry Pottery"), "Board Profile" (with "No Forms"), "Board Member" (with "No Forms"), and "Agency Budget" (with "No Forms").

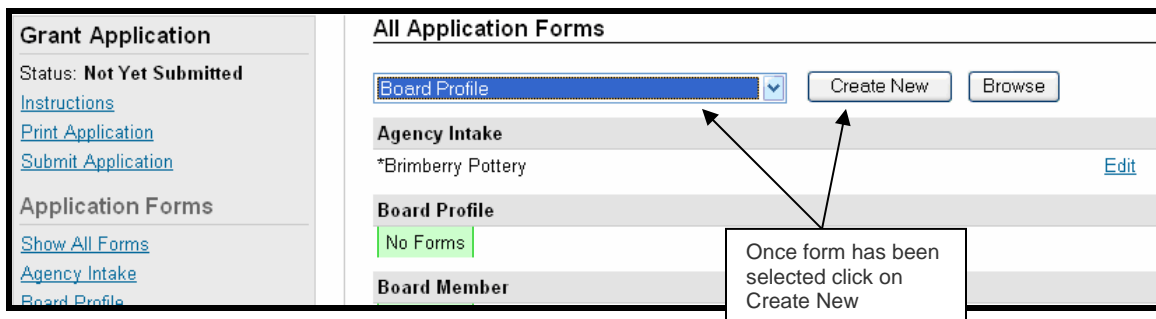
Create Forms

To create a new form, select that form from the top dropdown.



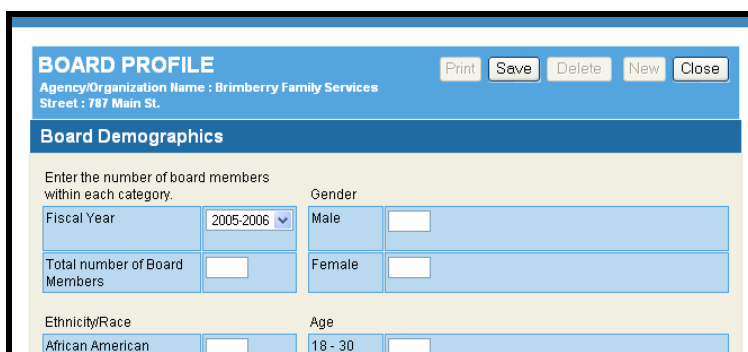
The screenshot shows the 'All Application Forms' interface. On the left, there is a sidebar for 'Grant Application' with status 'Not Yet Submitted' and links for 'Instructions', 'Print Application', and 'Submit Application'. Below this is a list of 'Application Forms' including 'Agency Intake', 'Board Profile', 'Board Member', 'Agency Budget', 'Supplemental Site Locations', 'Program Application', 'Triangle United Way Program Budget', 'Evidence of Need For Program', 'Basic Logic Model', 'Indicators and Projected Numbers', 'Validity and Reliability of Measurement Tools', 'Attached Document', and 'Program Year End Report'. The 'Board Profile' form is highlighted in blue in the dropdown menu. A callout box points to this selection with the text 'Select form to complete'. To the right of the dropdown are 'Create New' and 'Browse' buttons. Below the list, there is a section for 'Supplemental Site Locations' with a 'No Forms' indicator.

Once the form has been selected, click on **Create New**.



This screenshot shows the 'All Application Forms' interface after the 'Board Profile' form has been selected. The dropdown menu now displays 'Board Profile'. The 'Create New' button is highlighted with a callout box that says 'Once form has been selected click on Create New'. The 'Agency Intake' form is visible below with the value '*Brimberry Pottery' and an 'Edit' link. The 'Board Profile' form shows 'No Forms' and the 'Board Member' form is partially visible at the bottom.

The user can now complete the form and click on **Save** when finished.



The screenshot shows the 'BOARD PROFILE' form for 'Brimberry Family Services' at '787 Main St.'. The form includes a 'Board Demographics' section with the instruction 'Enter the number of board members within each category.' The fields are organized as follows:

Gender	
Fiscal Year: 2005-2006	Male: <input type="text"/>
Total number of Board Members: <input type="text"/>	Female: <input type="text"/>

Age	
Ethnicity/Race: African American	18 - 30: <input type="text"/>

Buttons for 'Print', 'Save', 'Delete', 'New', and 'Close' are located at the top right of the form.

Once the form has been saved, the user will be taken back to the list of **All Forms**, and now the user can select another form from the dropdown, or edit an existing form, by clicking on **Edit** next to the corresponding form.

Browse

If this is not the first funding cycle for an organization, there could be the option to **browse** for **previous versions** of a specific form. If that is the case, when a form is selected from the dropdown, the **Browse** button will become activated along with **Create New**.

The **Browse** button allows the applicant to look at previous versions of the same form that were created in previous applications. The applicant can navigate between multiple forms by using the **Next** and **Previous** buttons at the top of the each form. Once the applicant finds the form needed click on **Create Copy**.

4.2 Selecting Individual Forms

Another option for completing forms is to select the corresponding form link from the list on the left hand side of the screen.

The screenshot shows a web interface with a left sidebar and a main content area. The sidebar has a 'Grant Application' section with status 'Not Yet Submitted' and links for 'Instructions', 'Print Application', and 'Submit Application'. Below that is an 'Application Forms' section with a 'Show All Forms' link and a list of form categories: 'Agency Intake', 'Board Profile', 'Board Member', 'Agency Budget', 'Supplemental Site Locations', 'Program Application', and 'Triangle United Way Program Budget'. The main content area is titled 'All Application Forms' and has a dropdown menu, 'Create New', and 'Browse' buttons. Below this is a list of form categories: 'Agency Intake' (with '*Brimberry Family Services' and an 'Edit' link), 'Board Profile' (with '2006-02-02' and an 'Edit' link), 'Board Member' (with 'No Forms'), 'Agency Budget' (with 'No Forms'), and 'Supplemental Site Locations' (with 'No Forms'). A callout box with a black border and white background points to the 'Board Member' and 'Agency Budget' links, containing the text: 'Forms can be completed by selecting individual form links.'

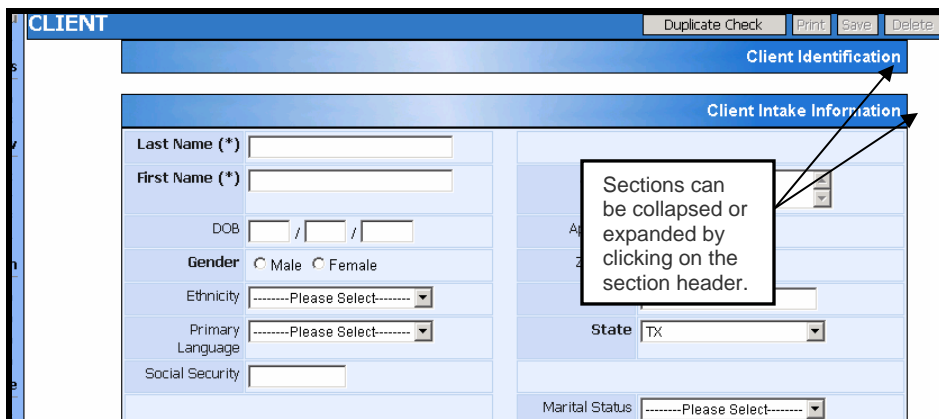
When this option is used, the user is also able to view additional information regarding that specific form. The same dropdown is at the top, but the selected form is already in view, so the user only has to click on **Create New** or **Browse** (if available).

The screenshot shows the 'Board Member' form page. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Board Member' and has a dropdown menu, 'Create New', and 'Browse' buttons. Below this is a section for 'Board Member' with 'No Forms' and a note: '* Indicates required fields are missing'. The 'Form Details' section at the bottom of the sidebar shows: 'Are Multiple Forms Allowed: Yes' and 'Are There Required Fields: Yes'.

4.3 Forms and Data Entry

This following section will cover how to **fill out forms** in the CI ODM. This is an example of a typical form within the CI ODM. This is only a sample. Each organization has the opportunity to create forms that are specific to the specific grant application process.

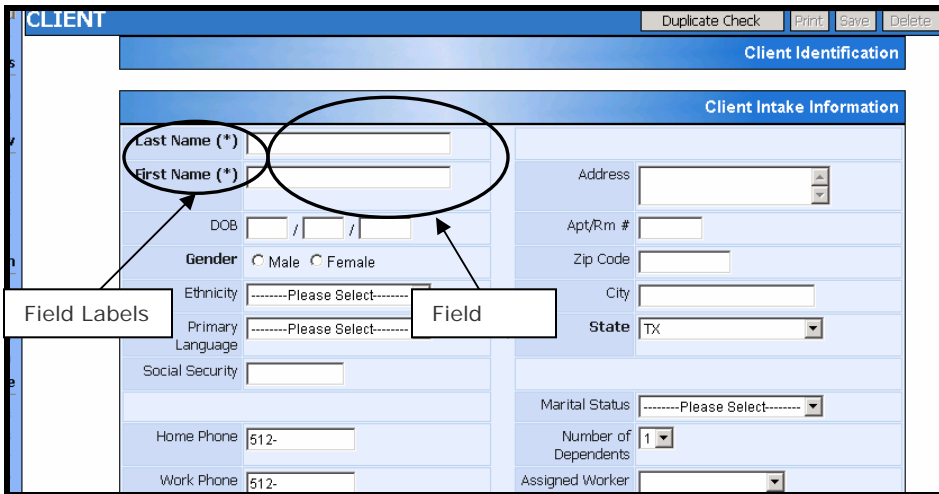
Forms can be made of **multiple sections**, and some sections are collapsed when a form is opened, and the user must **“click”** on the section to open it. This **collapse** functionality is agency defined.



The screenshot shows a web form titled "CLIENT" with a header bar containing "Duplicate Check", "Print", "Save", and "Delete" buttons. Below the header, there are two main sections: "Client Identification" and "Client Intake Information". The "Client Identification" section is currently collapsed, while the "Client Intake Information" section is expanded. A callout box with a white background and black border points to the "Client Intake Information" header, containing the text: "Sections can be collapsed or expanded by clicking on the section header." The form fields include: Last Name (*), First Name (*), DOB (MM/DD/YYYY), Gender (Male/Female radio buttons), Ethnicity (Please Select dropdown), Primary Language (Please Select dropdown), Social Security, State (TX dropdown), and Marital Status (Please Select dropdown).

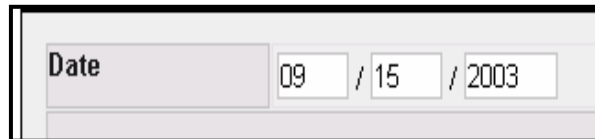
4.4 Field Labels and Field Input

All forms contain two elements--**Field Labels** and **Field Input**. The Field Label will describe what type of data should be entered or selected. Field Input is the area used to input data or to make a selection from the options available.



Date Fields

Date fields are pre-formatted to make data entry easier. The month field can be completed by typing "05" or simply "5" for May. The CI ODM will take the user to the day field automatically – tabbing is not necessary. Be sure to use a two-digit format for the day box ("07" rather than "7" for the seventh day of the month). The CI ODM will accept "07" or "2007" for the year 2007.



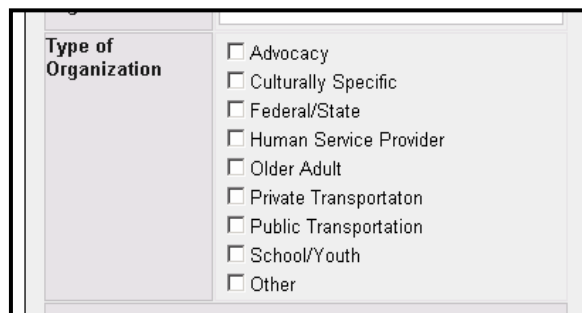
Text Boxes

When there is an empty field, this indicates that text can be entered. Click in the **text box** to make the entry. Text Boxes may be limited to a specific number or type of characters depending on the type of data collected in this field.




Check Boxes

When there is a square box, this indicates a check can be placed next to the appropriate selection. Click once on the box to add a check. If this box does not need to be checked, click



again and the check will disappear.

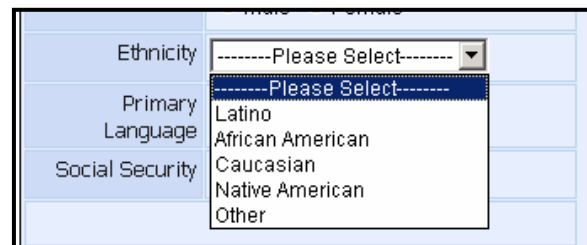
Narrative or Comment Fields

A screenshot of a form field labeled "Notes". It consists of a small grey box on the left with the word "Notes" inside, and a larger white text area on the right with a vertical scroll bar on its right side.

A "Comment" or "Narrative" field is a larger space to write any amount of text. Click in the box and begin typing. If the organization has specified a character limit, the box will stop allowing input once the limit has been reached.

Drop-down Lists

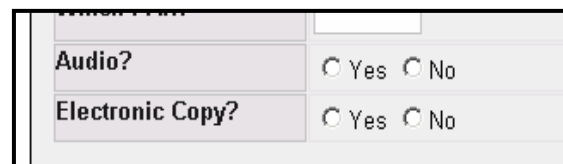
A field that has a down arrow next to it indicates a **drop-down list**. Click on the **arrow**

A screenshot of a form with a table-like structure. The first row is labeled "Ethnicity" and has a drop-down menu next to it. The menu is open, showing a list of options: "Please Select", "Latino", "African American", "Caucasian", "Native American", and "Other". The "Please Select" option is currently selected in the menu.

and a pick list will appear. If necessary, use the scroll bar to see all of the choices. To choose one, put the mouse pointer over the chosen text and click once. This will automatically place the choice in the box.

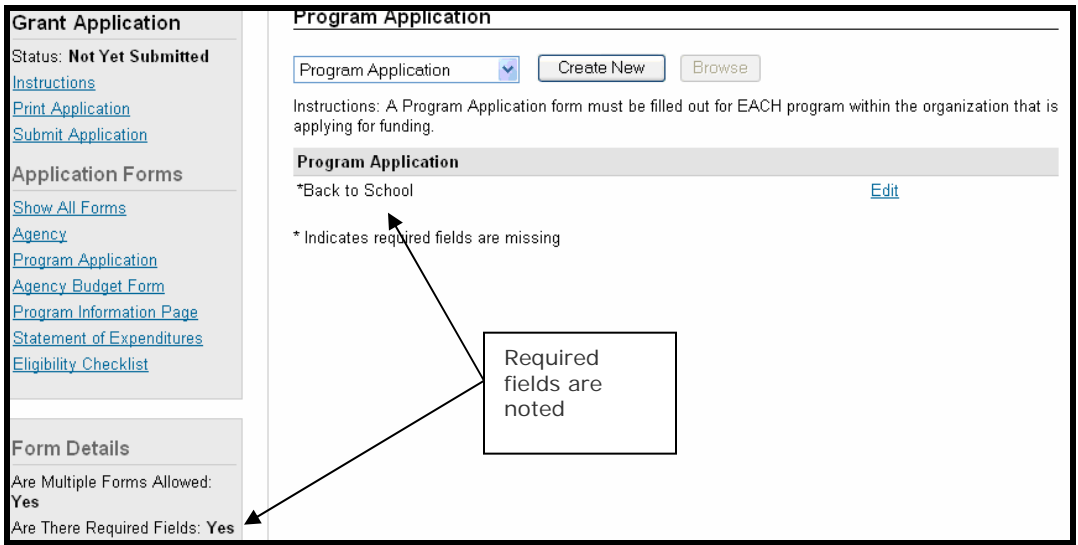
Radio Buttons

Similar to check boxes, radio buttons have a circle next to each option. While checkboxes allow multiple selections, only one selection can be made in a radio button field.

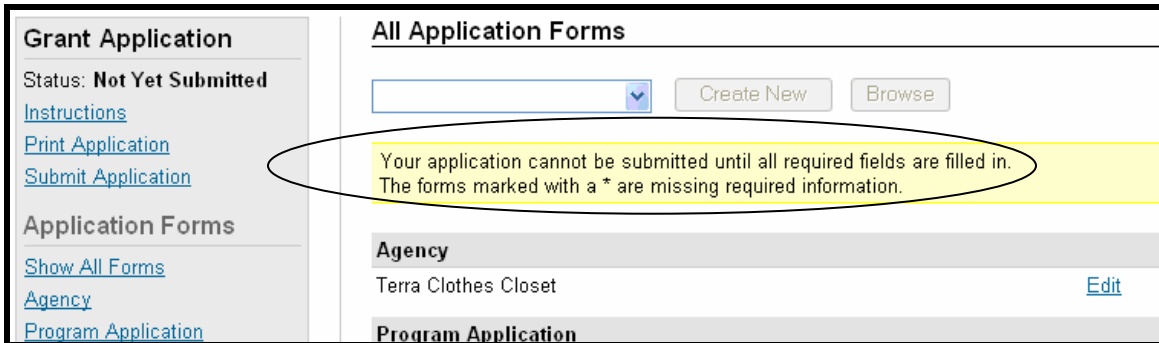
A screenshot of a form with two rows of radio buttons. The first row is labeled "Audio?" and has two radio buttons labeled "Yes" and "No". The second row is labeled "Electronic Copy?" and also has two radio buttons labeled "Yes" and "No".

Required Fields

An **asterisk** on the Grant Application screen and a note under **Form Detail** indicates that there are required fields set on a form.

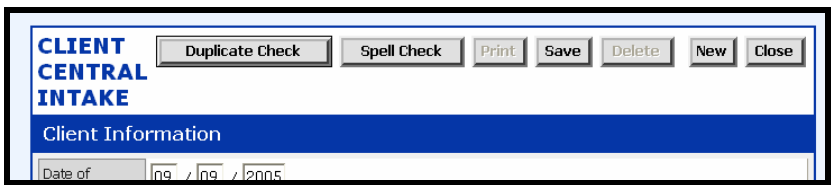


Required fields are activated once an application is submitted. If an application is submitted without all of the required fields completed, a note will appear on the Grant Application screen, and the submission will not be completed. See example of an application with incomplete required fields below.



4.4 Action Buttons

Finally, there are action buttons in the header of each form.



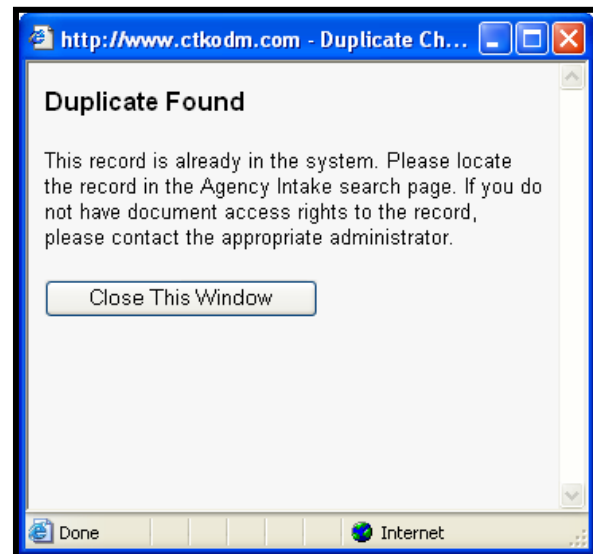
Duplicate Check

If the duplicate check functionality has been turned on by your organization, then a **duplicate check** will have to be made before a form can be saved. This functionality only works on a Primary Form, which is usually the first form filled out when entering information.

When **Duplicate Check** has been selected for the Primary Form, a “**Duplicate Check**” button will appear at the top of a new form. When a field is used for Duplicate Check, it becomes a **required field** that the user must fill out in order to save the form. Duplicate Check fields are designated by a small “paper” icon.

The screenshot shows the 'AGENCY INTAKE' form. At the top, there is a navigation bar with buttons for 'Duplicate Check', 'Spell Check', 'Print', 'Save', 'Delete', 'New', and 'Close'. Below this are sections for 'Administrative Info' and 'Agency Details'. In the 'Agency Details' section, there are three input fields: '*Agency/Organization Name' (containing 'Terra's Agency'), 'Website' (containing 'http://'), and 'Agency Address' (with a sub-field 'Street' that is empty). A callout box points to the 'Duplicate Check' button with the text 'Click to check for duplicate record.' Another callout box points to the 'Agency/Organization Name' and 'Street' fields with the text 'Duplicate check fields'.

If there is a **duplicate** that matches all of the criteria selected, which in this example are the Agency Name, Zip, and City, a message box will pop up alerting the user of a possible duplication, and the ability to save the form will remain deactivated. If there is no duplication, the pop up box will flash briefly and then disappear, and the ability to save the form will be activated.

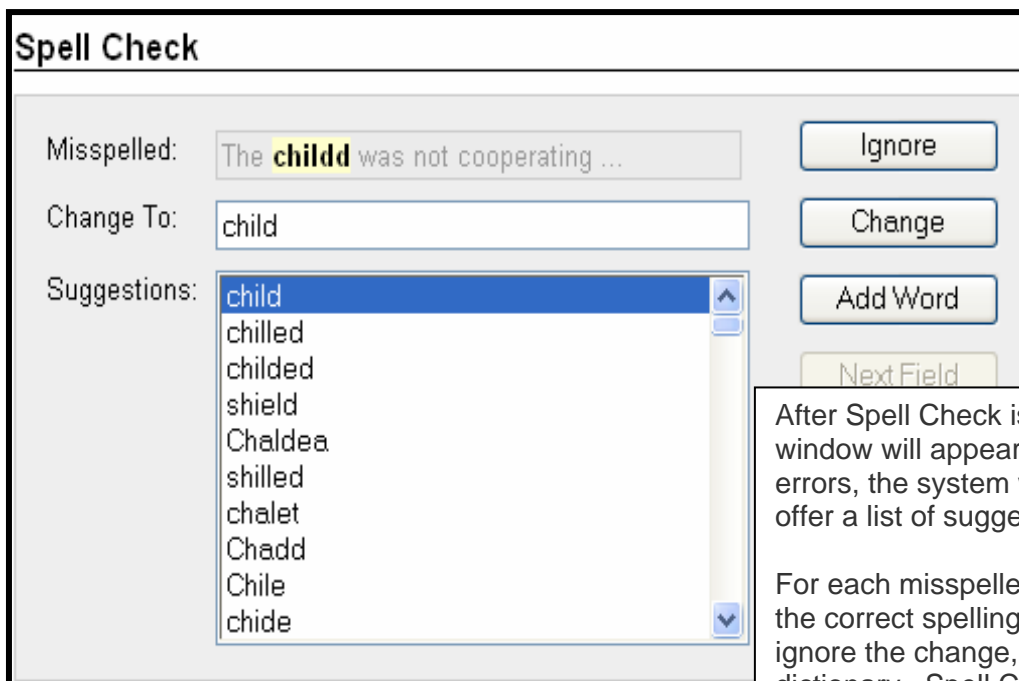
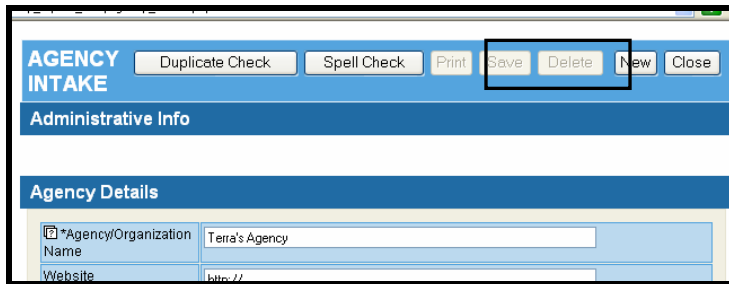


Spell Check

Spell Check is now available as an option for any form in the CI ODM. **Spell Check** is added to a form through the **Form Properties** box in the **CI ODM Designer**. If Spell Check is enabled by the Funding

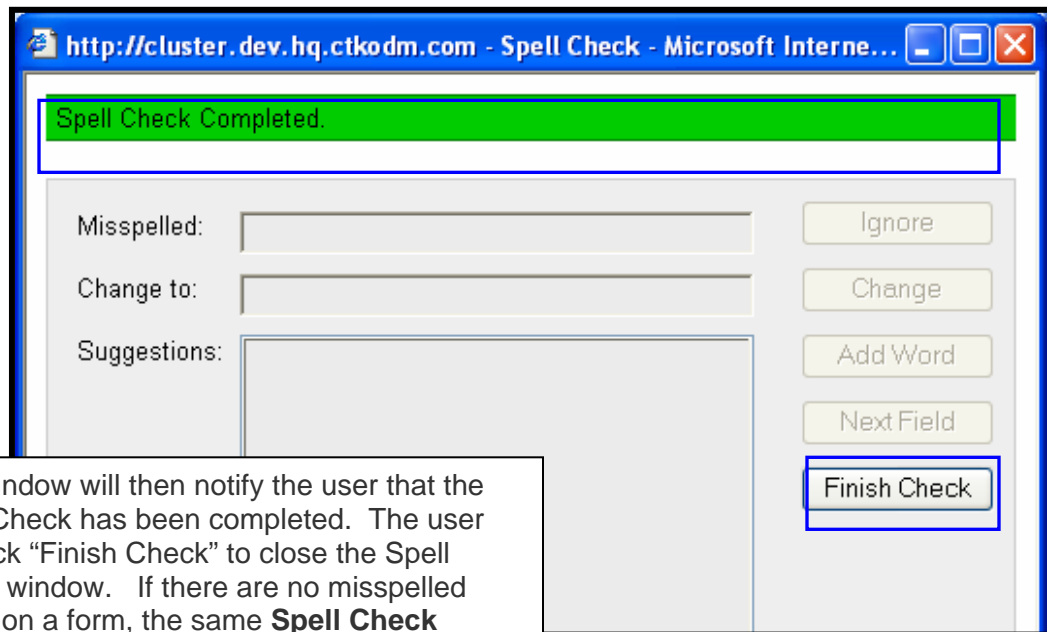
Organization, it is applied to the entire form and will spell check all text boxes and text areas within that form.

When **Spell Check** has been added to a form, a **Spell Check button** will appear at the top of the form in the CI ODM. To check the spelling for all text boxes and text areas on the form, click "**Spell Check.**"



After Spell Check is selected, a second window will appear. If there are spelling errors, the system will identify the error and offer a list of suggested spellings.

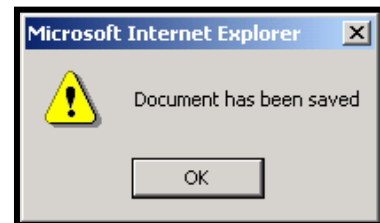
For each misspelled word, the user can select the correct spelling from the provided list, ignore the change, or add the word to the dictionary. Spell Check will continue to move from word to word and field to field until all of the misspelled words are identified.



The window will then notify the user that the Spell Check has been completed. The user will click "Finish Check" to close the Spell Check window. If there are no misspelled words on a form, the same **Spell Check Completed** window will appear.

Save Button

Once a form has been completed, press the **Save** button on the top of the form. A pop-up window appears to confirm that the form has been saved.



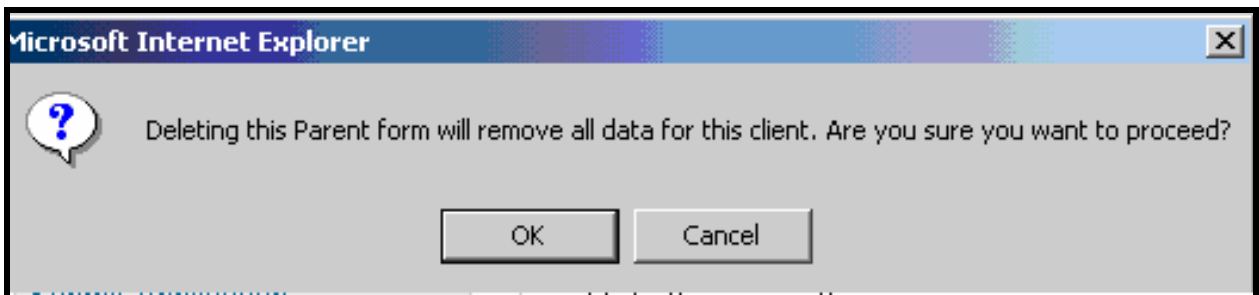
If a user attempts to save a form before filling in required fields, a pop-up window will appear with a list of all fields that need to be completed.



Saving a form will save the work and return the user to the **Grant Application** screen.

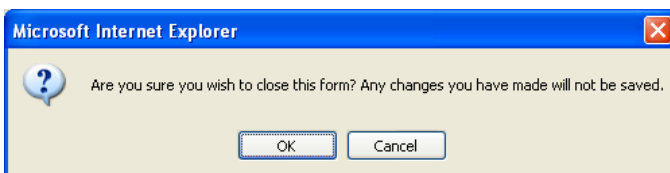
Delete Button

This option **deletes** the form. A pop-up window will request confirmation that the user wishes to delete this form. When deleting a Primary Form (within the CI ODM this is usually the agency form), the system will alert the user to the fact that deleting the form will remove **ALL data** for that "agency". Only specified users will have the delete option available.



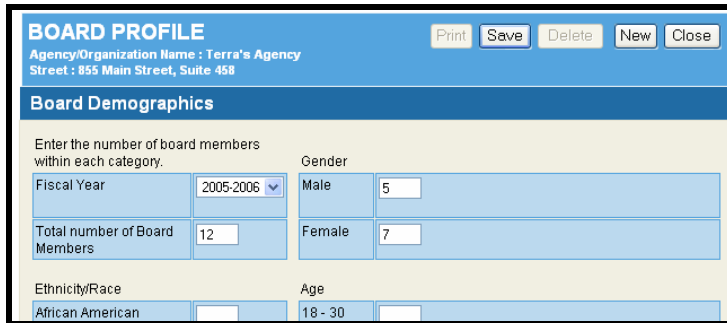
Close Button

This option closes the form and returns the user to the **Grant Application screen**. A pop-up window will confirm that the user wishes to close the form, and reminds the user that any changes made since the form was last saved, will not be saved.



Additional Information

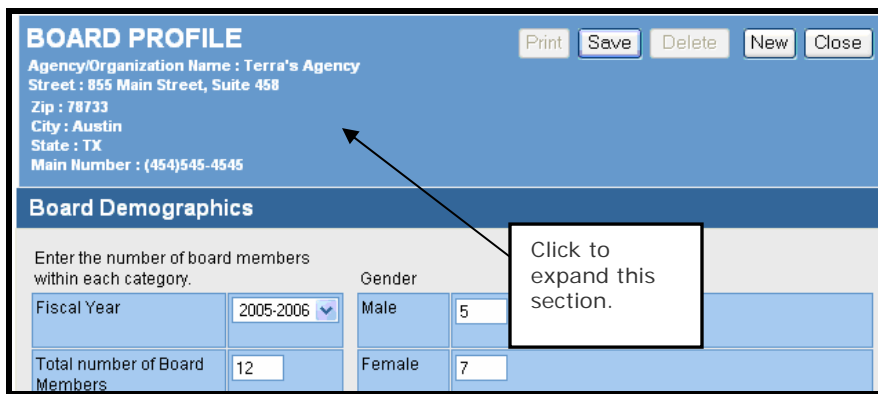
At the top of every form, (except for the Primary form), is a section of information that pulls from that form's Primary Form. When a form is opened, only the first two fields appear at the top of the form.



The screenshot shows the 'BOARD PROFILE' form for 'Terra's Agency'. The header includes the agency name and address. Below is the 'Board Demographics' section with a table for entering member counts.

Enter the number of board members within each category.		Gender	
Fiscal Year	2005-2006	Male	5
Total number of Board Members	12	Female	7
Ethnicity/Race		Age	
African American		18 - 30	

A single click on the information at the top of the form will expand this portion of the form, to reveal key data points from the Primary Form. Another click will close the header to its normal height.



This screenshot shows the same 'BOARD PROFILE' form, but the header information is expanded. A callout box with an arrow points to the expanded header area, containing the text: 'Click to expand this section.'

Expanded header information:
Agency/Organization Name : Terra's Agency
Street : 855 Main Street, Suite 458
Zip : 78733
City : Austin
State : TX
Main Number : (454)545-4545

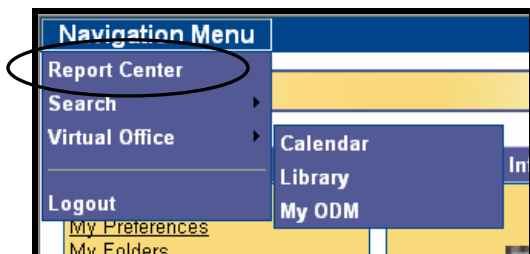
THIS CONCLUDES THE CHAPTER ON APPLICATION FORMS.

5. Additional Tools

Additional tools might be available to some users, based on permission given by the funding organization. These tools would be located on the **Navigation Menu** and could include the following:

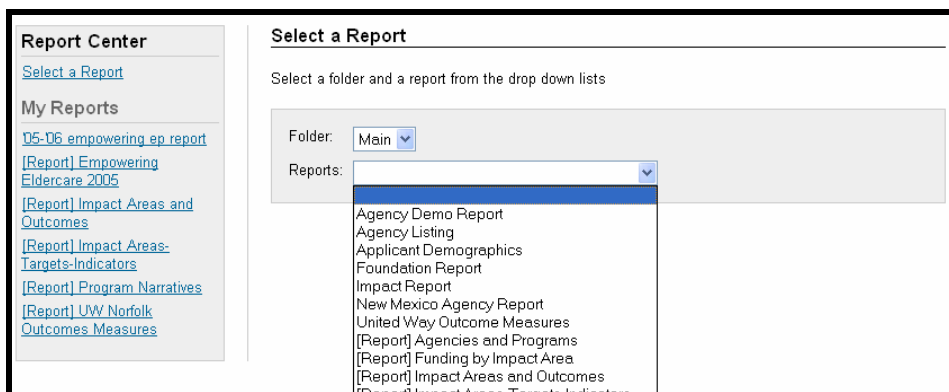
5.1 Report Center

The **Report Center** is where a user goes to run reports that have been assigned to that user. To access the **Report Center**, select it from the **Navigation Menu**.

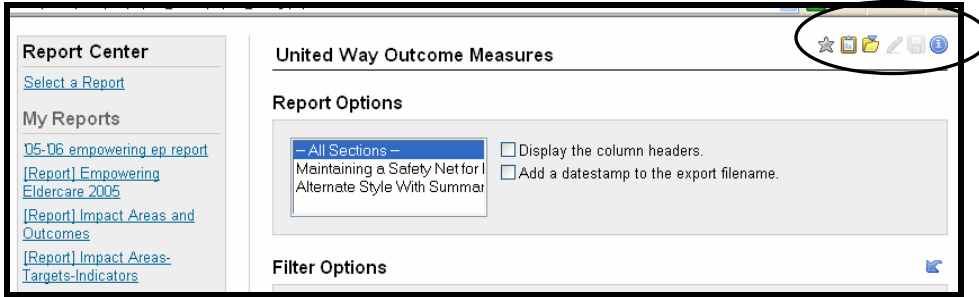


Select a Report

The Report Center defaults when opened to the **Select a Report** link. This view shows two dropdowns. First select the appropriate folder from the **Folder dropdown**, and then select the report from the **Reports dropdown**.



Once a report is selected the next screen will show the report along with all of the filters that have been allowed for that report, along with a new set of icons at the upper right-hand corner of the report.

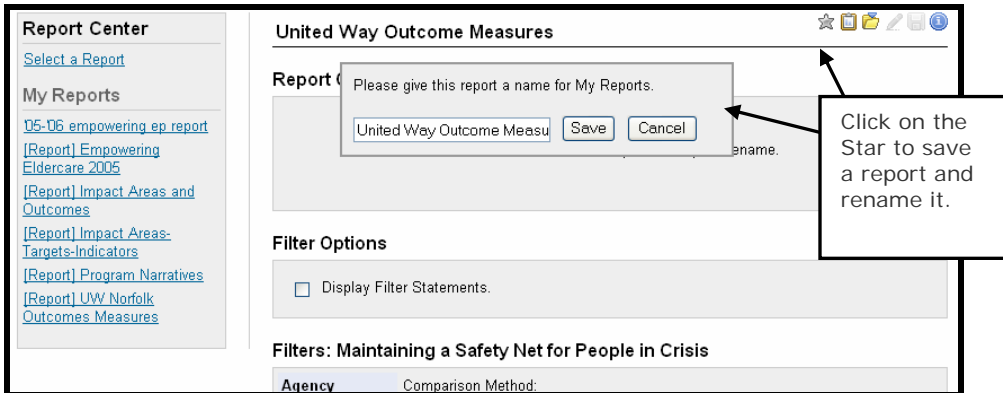


5.1 Report Center Icons

A variety of icons are used in **Report Center** and will be described in this following section.

Save to My ODM

The first icon is the **Star** icon (★), which is used to save a report to My ODM. In addition, when a report is saved to My ODM, it can be **renamed and saved** before or after filters have been set.

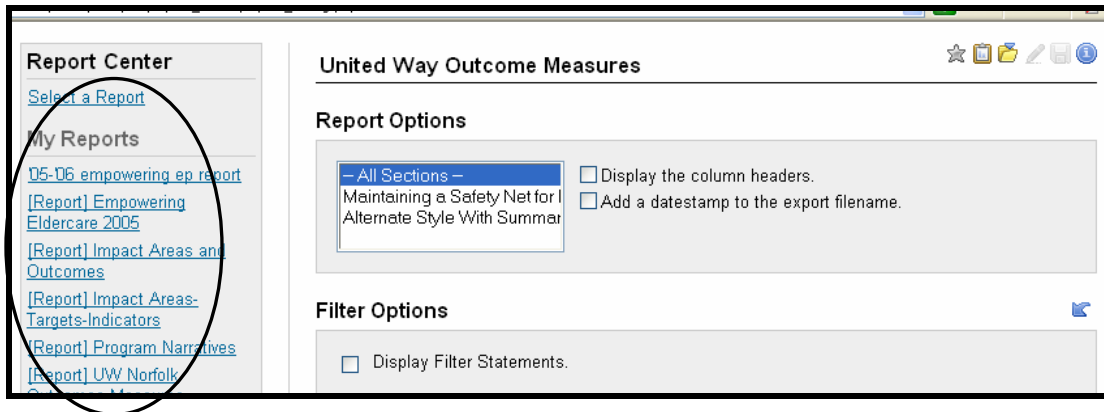


This allows a user to filter the report and then save that filtered version to My ODM. The same report can be filtered and saved multiple times under different headings. In this example, a United Way Outcomes Report can be saved for a specific outcome.



Once the newly named report has been saved, it can be accessed from **My Reports** on the My ODM screen.

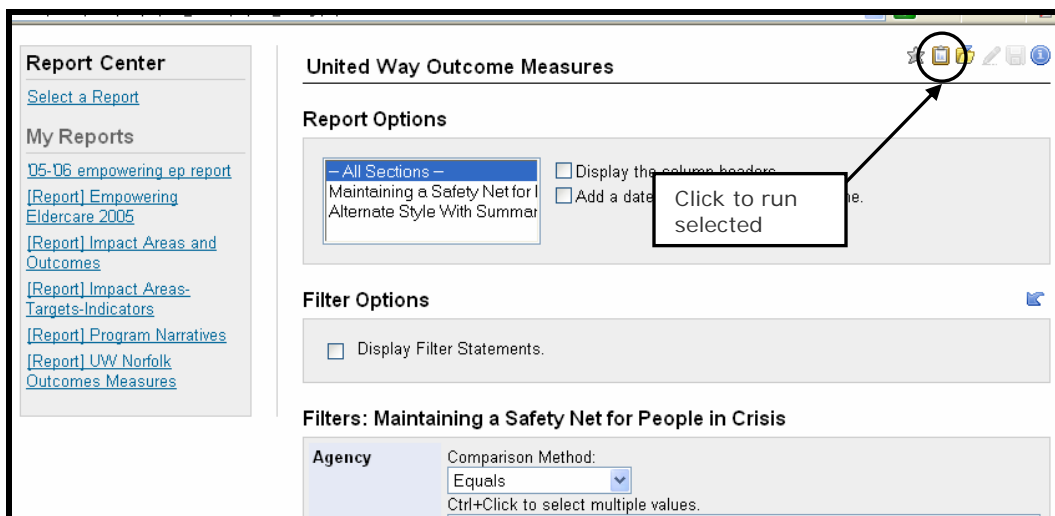
In addition, the user can access saved report in **Report Center** under **My Reports**.



Run Report

This “**clipboard**” icon is used to run a report. Select a report from the **Select a Report** screen or from **My Reports**. Set the filters, if needed, and then click on the **Run Report** icon. (Filtering is covered in a later section of this manual.)

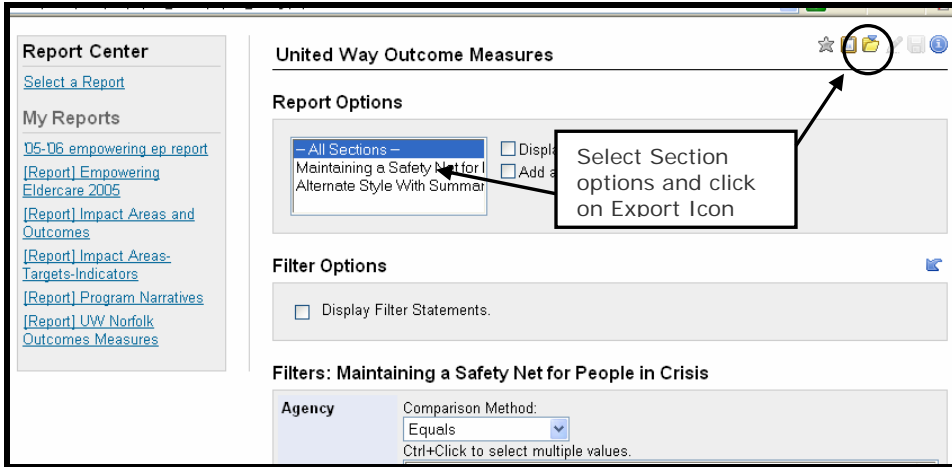
If a report is selected from My Reports it must be “edited” in order to change the filters. (See below for how to edit a report).



Exporting Report Data

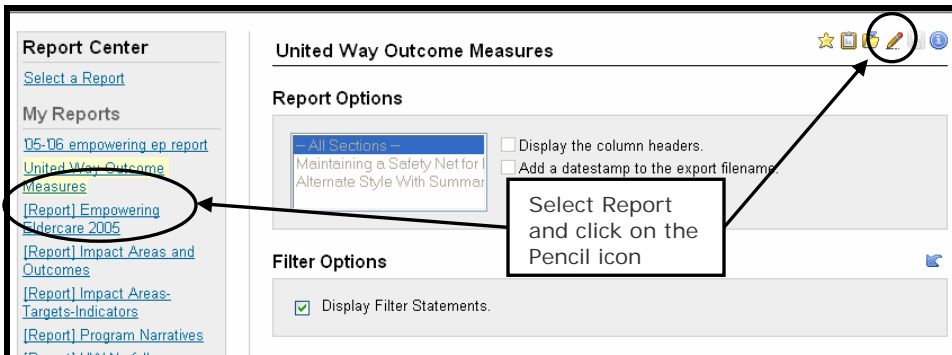
A user has the option to export an entire report to a .CSV file, or just to export one or more sections at a time. The Sections are selected from the first dropdown, and the top option is **"All Sections"**.

Once they are selected, click on the **Open Folder** icon at the top of the screen.



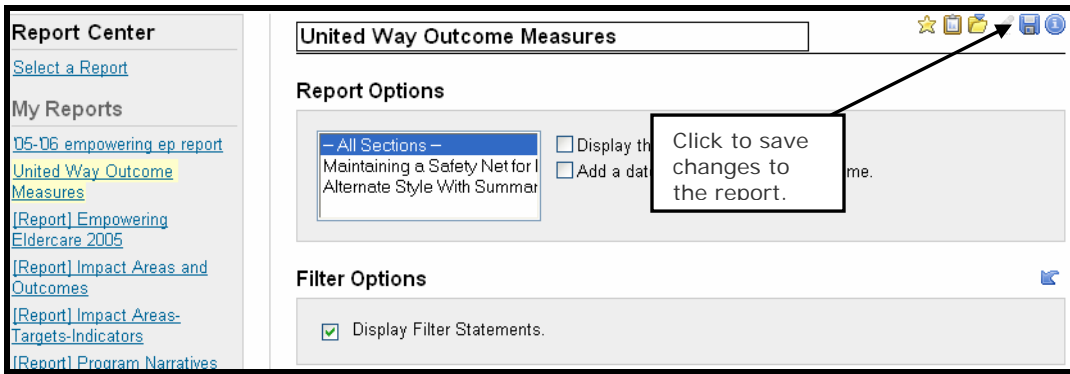
Editing a Saved Report

To edit a saved report, click on the specific report link under **My Reports**. Once the report appears on the screen, click on the **pencil icon** in the upper right-hand corner of the screen.



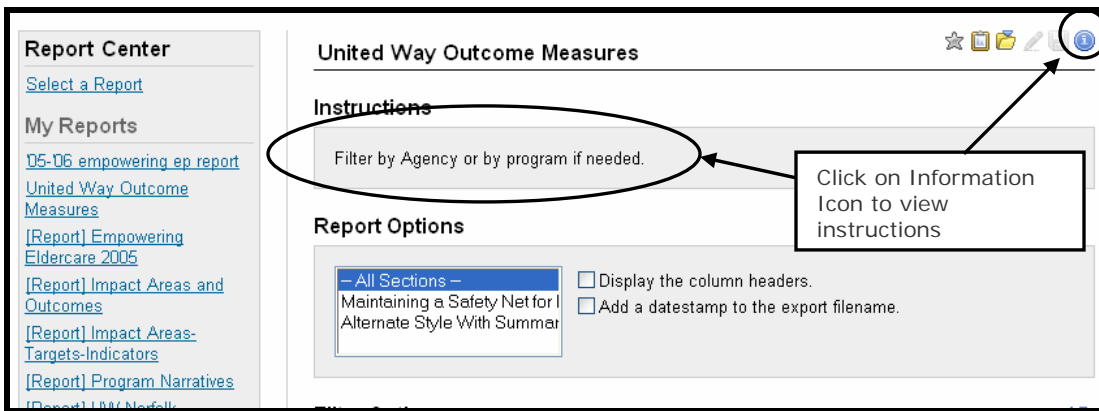
This will activate all of the options for the report. The report can now be edited. Click on the **Save icon**, located to the right of the Pencil icon, to save any changes or edits to that saved report.





Information

Any instructions that have been added to a report can be viewed by clicking on the **Information icon**. Click the Information Icon again to hide the instructions.



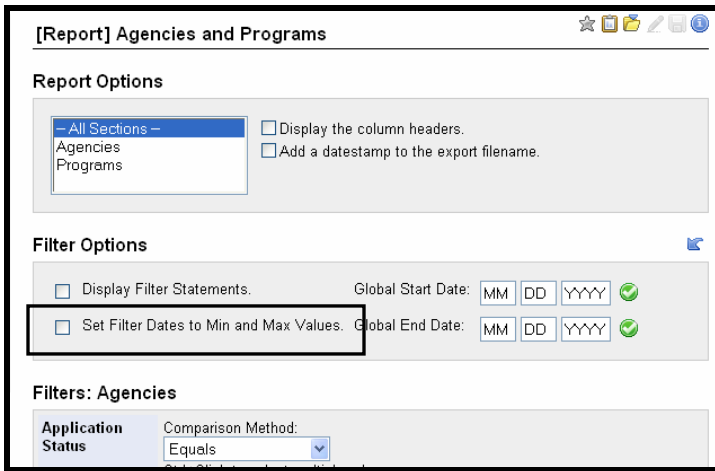
5.2 Report Filters

Report filters are determined when a report is being created in **Report Builder**.

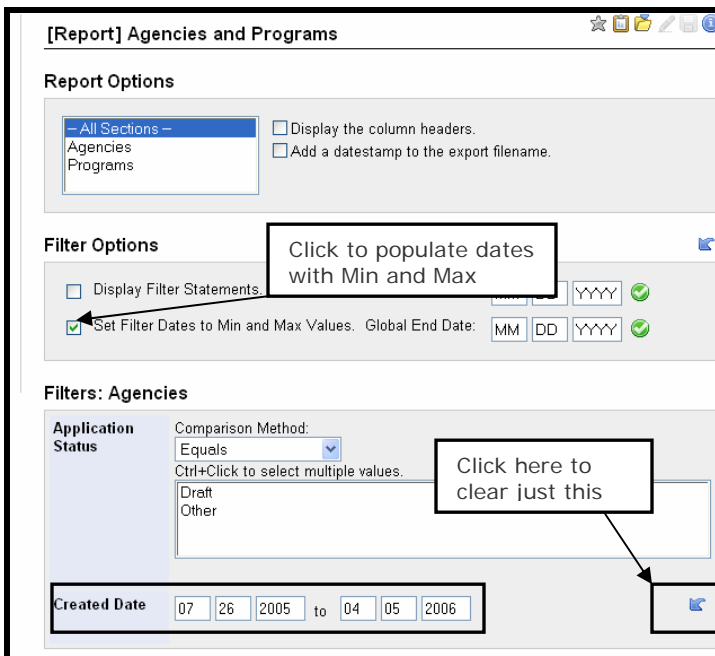
If no filters are available, it simply means that the report creator did not allow for filters to be set. It may also mean that certain filters are in place before the report is run.

Minimum/Maximum Date Values

When a report is first selected, the **minimum and maximum date values** will not be filled out by default as they were in the past. Users may add them as desired.

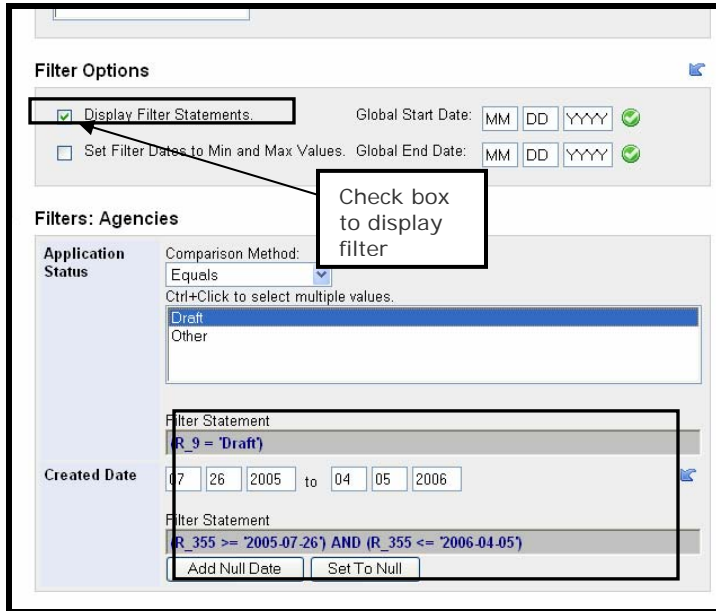


To view the minimum and maximum saved values for the filterable date fields, select the **Set Filter Dates to Min and Max Values** option. Once selected, minimum and maximum date ranges will appear in the filters. After dates have been entered, the values for a particular filter can be removed by clicking the **Clear** button.



Filter Statements

The filter statements will appear if the user selects the **Display Filter Statements** option, along with the **Add Null Date** and **Set To Null** options. To remove the filter statements, uncheck **Display Filter Statements**.

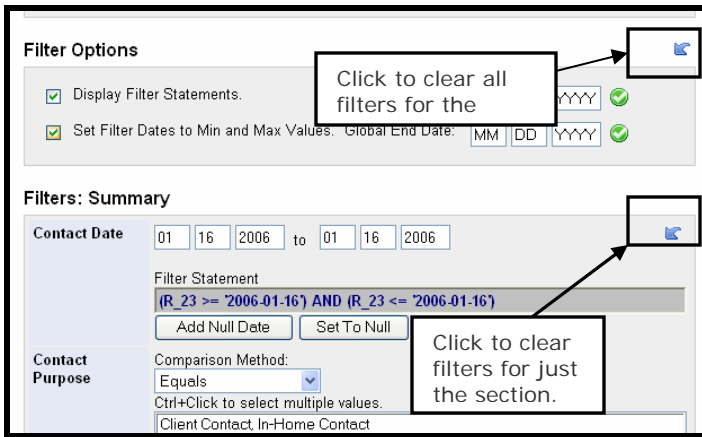


Filter Dates

A user can filter for a specific start or end date and have that **date value** populate into all of the date filters in every section of the report. Users do not need to enter any dates in the **Report Center filters** to run a report. Reports can be run with just a start date or an end date. If no date is entered for a specific range, then all possible records will pull into the report.

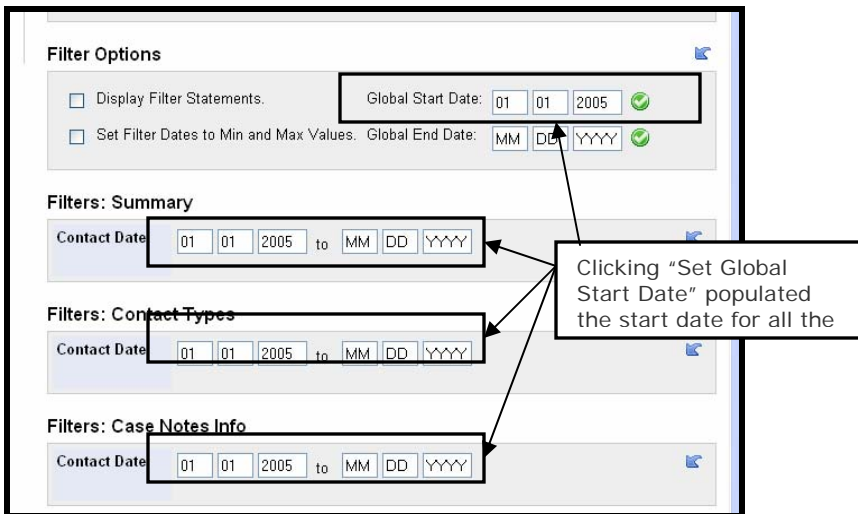
Clear Filters

Filters can be cleared for an entire report or just for a section at a time. To **clear** all of the filters that have been set up for a report, click on the **Arrow icon** at the top right of the Filter Options box. To clear only one section at a time, use the corresponding **arrow** for that section.



Global Dates

A single date can be used to populate all of the date filters for a report. To set a global date, enter the date into the **Set Global Start Date** or the **Set Global End Date** field and click the appropriate button to populate all of the start or end dates in every section of the report.



If a different date is needed for one or more of the fields, the desired date can be entered manually in the date filter.

5.3 The Library

The ODM Library is located under **Virtual Office** on the navigation menu.

The screenshot shows a navigation menu on the left with the following items: Client Central Intake Search, Home Intake Search, Office Information Search, Staff Intake Search, Volunteer Search, **Virtual Office**, Add/Edit Bulletins, Bulletins, Calendar, **Library** (highlighted), My ODM, **Administration**, Access Control, and Email Notifications. To the right, there is a search bar containing 'Powerpuff, Blossom', a 'My Calendar' window for November 2005, and a section for 'Next 1 Day's Events' which states 'No events scheduled.'

All Files

The user is first directed to the **All Files** screen in the **ODM Library**. On the left hand side of the screen is a box with links to all of the different screens available in the ODM Library.

The screenshot shows the 'All Files' screen. On the left, there is a 'Library' sidebar with links: All Files (highlighted), File Manager, Upload, Search, Folders, CTK Manuals, Human Resource Documents, and Sign Up Sheets. The main area displays a table of files:

	Title	Folder	File Name	Size	Published	
☆	CTK Version 3.0 Manual	CTK Manuals	ODM Version 3.pdf	1.9 MB	4/8/2004	✖
☆	ODM Designer Manual	CTK Manuals	Designer 3.0.pdf	1.8 MB	11/17/2005	✖
☆	CTK Report Builder Manual	CTK Manuals	Report Builder 3.0.pdf	1.5 MB	11/17/2005	✖
☆	CTK Implementation Manual	CTK Manuals	ODM Implementation Manual 3.0.pdf	867.4 KB	11/17/2005	✖

In addition, there are links to each folder created within the ODM Library. These will be different for each organization.

This screenshot is identical to the previous one, but the 'Folders' link in the sidebar is highlighted with a black box, indicating that users can navigate to specific folders within the library.

Finally, there is a listing of all documents that have been uploaded into the ODM Library.

Library		Files				
All Files File Manager Upload Search Folders CTK Manuals Human Resource Documents Sign Up Sheets		Title	Folder	File Name	Size	Published
★	📁 ⓘ	CTK Version 3.0 Manual	CTK Manuals	ODM Version 3.pdf	1.9 MB	4/8/2004 ✖
★	📁 ⓘ	ODM Designer Manual	CTK Manuals	Designer 3.0.pdf	1.8 MB	11/17/2005 ✖
★	📁 ⓘ	CTK Report Builder Manual	CTK Manuals	Report Builder 3.0.pdf	1.5 MB	11/17/2005 ✖
★	📁 ⓘ	CTK Implementation Manual	CTK Manuals	ODM Implementation Manual 3.0.pdf	867.4 KB	11/17/2005 ✖

Files

All of the documents that have been uploaded are listed under **Files**. The list can be sorted by clicking on the links at the top of each column; **Title, Folder, File Name, Size and Published**.

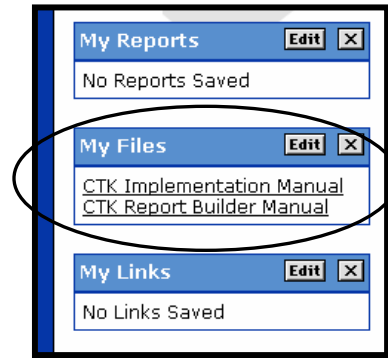
To the left of each document there are three icons; **Star, Folder and Info**. Each of these serves a different function. To the right of each document is a **Delete** icon, and at the top of the screen there is a **Help** icon. Place the cursor over an icon and a brief description of the icon functionality will appear.

Star

The Star icon is seen in other places within the CI ODM as well, and is used to add items to content boxes within **My ODM**. In the ODM Library, clicking on the Star turns it to yellow and that indicates that the item is now saved to My Files. To remove an item from **My Files**, click on the yellow star to change it back to gray (signifying a link to the file is NOT located on My ODM).

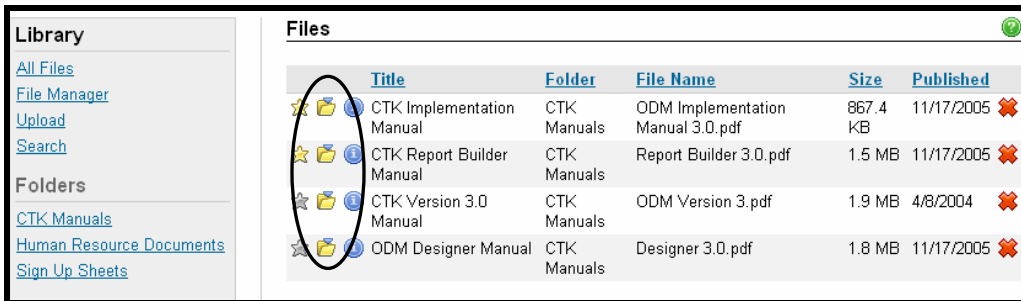
Library		Files				
All Files File Manager Upload Search Folders CTK Manuals Human Resource Documents Sign Up Sheets		Title	Folder	File Name	Size	Published
★	📁 ⓘ	CTK Implementation Manual	CTK Manuals	ODM Implementation Manual 3.0.pdf	867.4 KB	11/17/2005 ✖
★	📁 ⓘ	CTK Report Builder Manual	CTK Manuals	Report Builder 3.0.pdf	1.5 MB	11/17/2005 ✖
★	📁 ⓘ	CTK Version 3.0 Manual	CTK Manuals	ODM Version 3.pdf	1.9 MB	4/8/2004 ✖
★	📁 ⓘ	ODM Designer Manual	CTK Manuals	Designer 3.0.pdf	1.8 MB	11/17/2005 ✖

Once a file has been saved to **My Files**, it is displayed in **My ODM** under My Files.



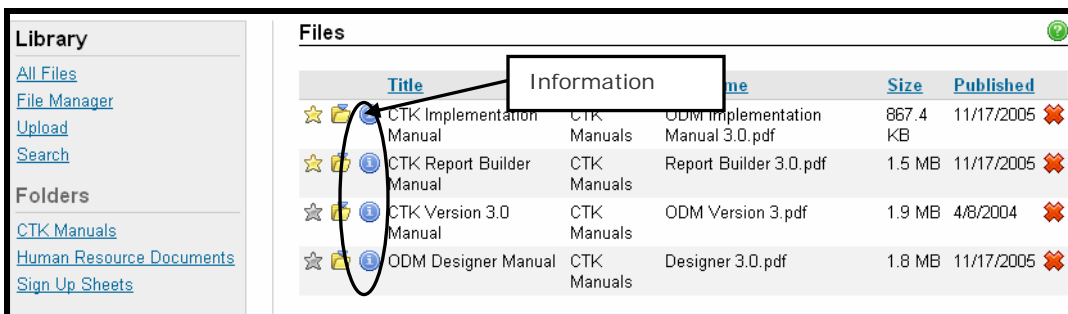
Folder

The folder icon allows the user to **download** the document. Click on the **Folder** icon that corresponds to the item to download. Once the document is downloaded, it can be saved to a computer, attached to an email or printed.



Information

The Information icon allows the user to ascertain **additional information** regarding the corresponding documents or file.



This Information icon will take the user to another screen that provides more in-depth information on that one document or file. From here the user can click on the **Star** icon to add this file to **My Files**, click on the Folder icon to download the file, or if available, click on the **Red X** icon to remove the file.

To return back to the previous list, the user can click on **Return to File List**, or use one of the links to the left of the screen.

The screenshot shows a web interface for the ODM Library. On the left is a sidebar with 'Library' and 'Folders' sections. The main content area is titled 'CTK Implementation Manual' and includes a 'Return to File List' link. Below this is a detailed view of a file with the following information:

Filename:	ODM Implementation Manual 3.0.pdf (867.4 KB Adobe PDF Document)
Folder:	CTK Manuals
Description:	This manual will provide all information regarding implementation of the CTK ODM.
Owner:	Administrator System (Administrators)
Upload Date:	11/17/2005 2:38pm
Available To:	Administrators
Suggested Viewer:	Click Here

Delete

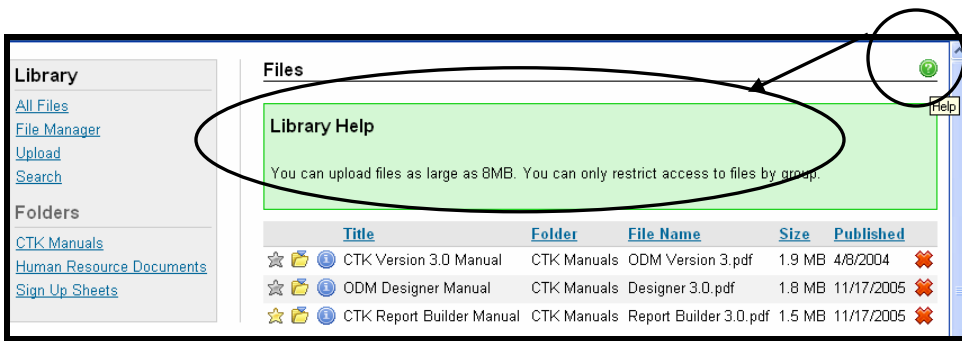
The **Delete** icon is only available to CI ODM Administrators, or to the user who uploaded that specific file. Deleting a file will delete it for all users. The system will always verify that the user wishes to delete the file. Click on **OK** to delete the file, or **Cancel**.

The screenshot shows the 'Files' section of the ODM Library. A table lists three files with columns for Title, Folder, File Name, Size, and Published. A 'Delete Icon' (a red 'X' in a circle) is highlighted on the right side of the table. A 'Microsoft Internet Explorer' dialog box is open in the foreground, asking 'Are you sure you want to delete this file?' with 'OK' and 'Cancel' buttons.

Title	Folder	File Name	Size	Published
CTK Version 3.0 Manual	CTK Manuals	ODM Version 3.pdf	1.9 MB	4/8/2004
ODM Designer Manual	CTK Manuals	Designer 3.0.pdf	1.8 MB	11/17/2005
CTK Report Builder Manual	CTK Manuals	Report Builder 3.0.pdf	1.5 MB	11/17/2005

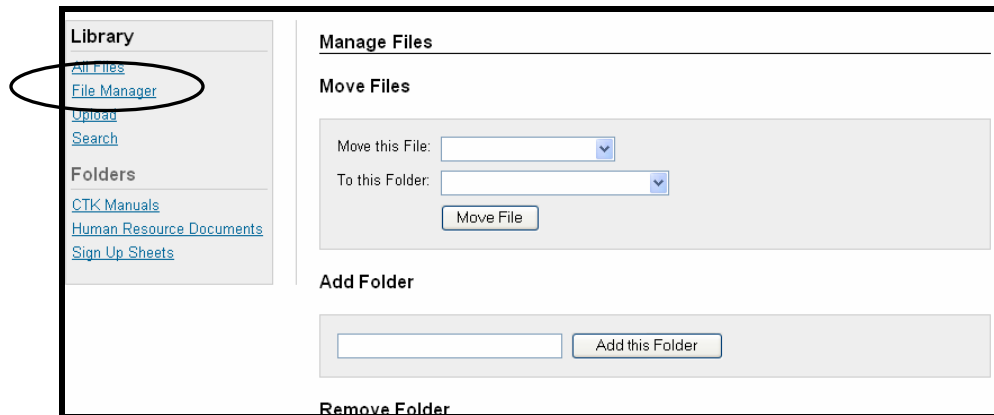
Help

The Help icon appears in the upper right corner of the screen, and provides the user with some additional information regarding the **ODM Library**.



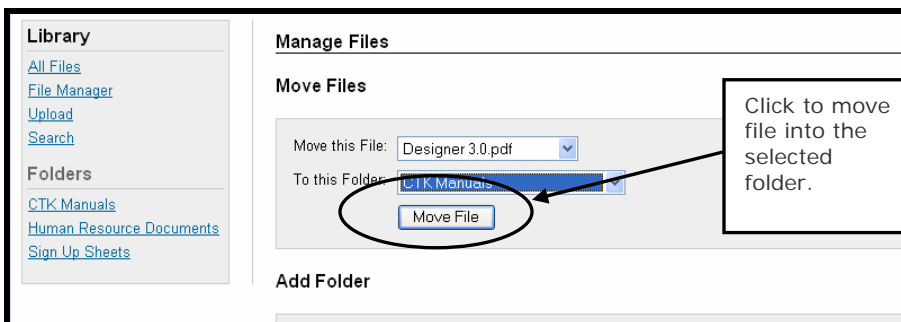
5.4 File Manager

The **File Manager** link allows the user to create folders, remove folders, and place files within folders. It is important to keep in mind that any changes done with this tool impacts the ODM Library for all Users.



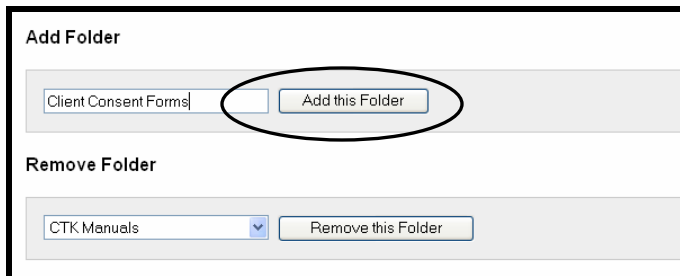
Move Files

To move a file into a Folder, select the file from the **Move this File** dropdown, and then select the correct Folder from the **To this Folder** dropdown. Once both dropdowns have been selected, click on **Move File**.



Add Folder

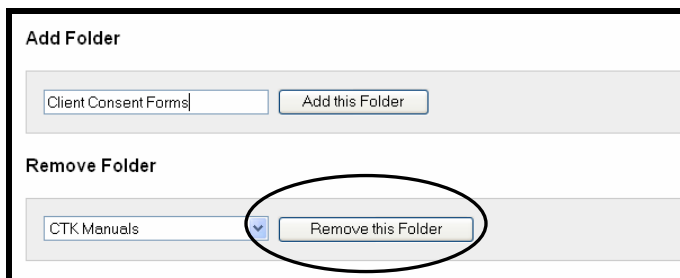
To add a folder to the list of folder options, enter the folder name in the space provided, and click on **Add this Folder**.



The screenshot shows a form titled "Add Folder". It has two sections: "Add Folder" and "Remove Folder". In the "Add Folder" section, there is a text input field containing "Client Consent Forms" and a button labeled "Add this Folder". The button is circled in red. In the "Remove Folder" section, there is a dropdown menu with "CTK Manuals" selected and a button labeled "Remove this Folder".

Remove Folder

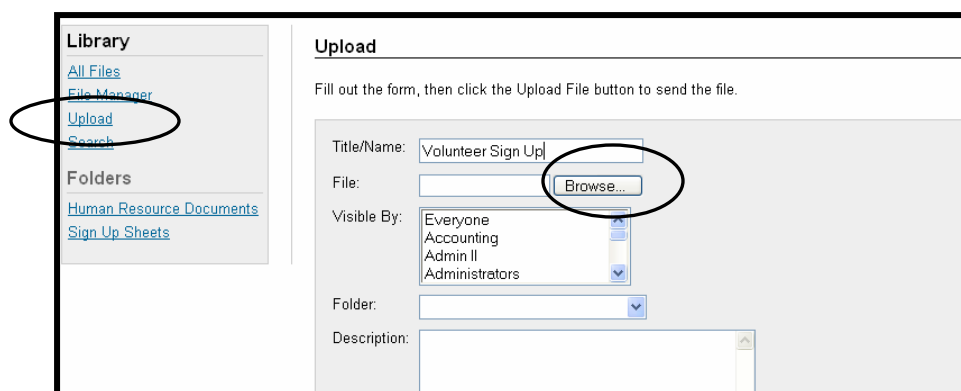
To remove a folder from the list of folder options, select the appropriate folder from the provided dropdown and click on **Remove this Folder**. If a folder has files attached to it, the files will not be deleted when the folder is removed. They will continue to be listed under **All Files**.



The screenshot shows a form titled "Remove Folder". It has two sections: "Add Folder" and "Remove Folder". In the "Add Folder" section, there is a text input field containing "Client Consent Forms" and a button labeled "Add this Folder". In the "Remove Folder" section, there is a dropdown menu with "CTK Manuals" selected and a button labeled "Remove this Folder". The button is circled in red.

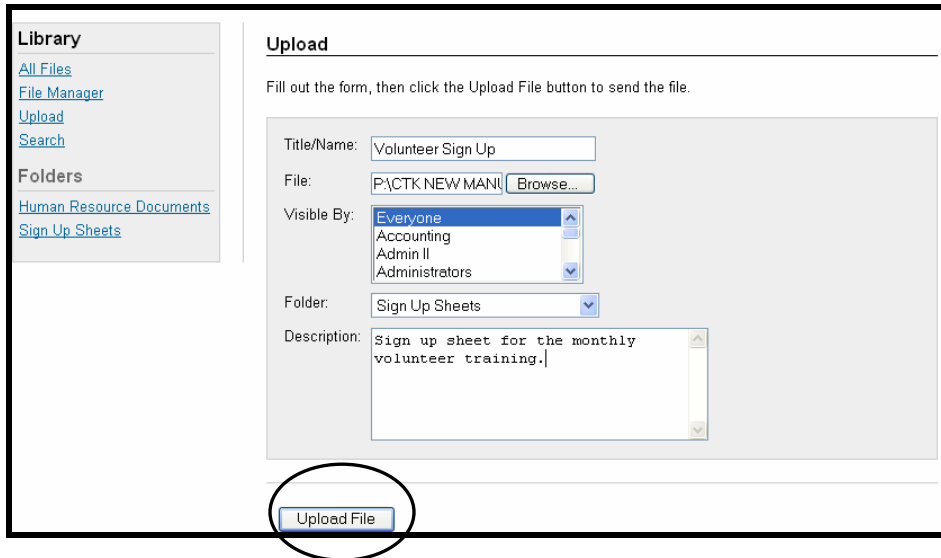
5.5 Upload

To upload a file into the **ODM Library**, click on the **Upload** link. Enter the title or name of the file/document in the space provided, and then click on **Browse**.



The screenshot shows the ODM Library interface. On the left is a sidebar with a "Library" section containing links for "All Files", "File Manager", "Upload", and "Search". The "Upload" link is circled in red. The main area is titled "Upload" and contains a form. The form has a "Title/Name:" field with "Volunteer Sign Up" entered, a "File:" field with a "Browse..." button circled in red, a "Visible By:" dropdown menu with "Everyone" selected, a "Folder:" dropdown menu, and a "Description:" text area. Below the form is a note: "Fill out the form, then click the Upload File button to send the file."

The **browse** button allows the user to locate the document on the user's computer. Select the document and then select the user group that needs to view the document. Next, select the appropriate folder. A description can be entered if desired. Finally, click on **Upload File** to upload the selected file to the **ODM Library**.



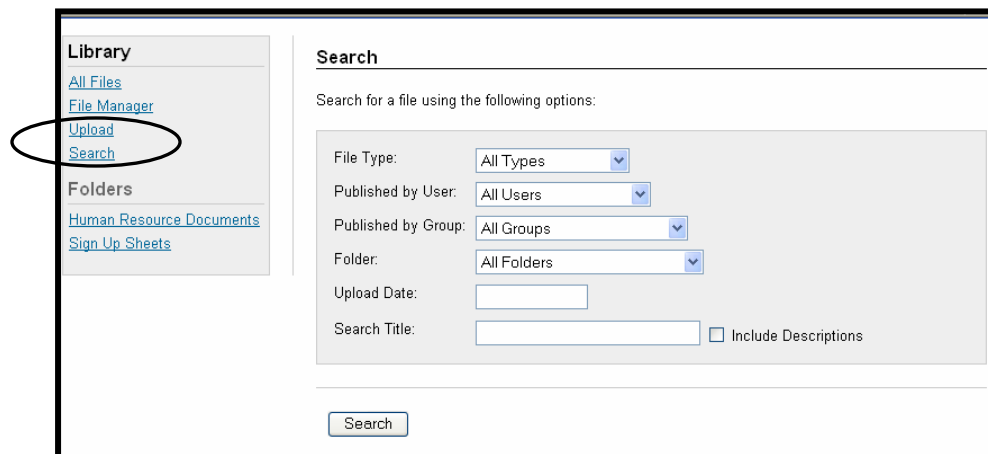
The screenshot shows the 'Upload' section of the ODM Library interface. On the left is a 'Library' sidebar with links for 'All Files', 'File Manager', 'Upload', and 'Search'. Below these are 'Folders' including 'Human Resource Documents' and 'Sign Up Sheets'. The main 'Upload' area contains a form with the following fields: 'Title/Name' (Volunteer Sign Up), 'File' (P:\CTK NEW MAN\ with a 'Browse...' button), 'Visible By' (a dropdown menu showing 'Everyone', 'Accounting', 'Admin II', and 'Administrators'), 'Folder' (Sign Up Sheets), and 'Description' (Sign up sheet for the monthly volunteer training.). At the bottom of the form, the 'Upload File' button is circled in red.

Once the file has been uploaded, a confirmation box will appear on the screen. Click **OK** to finalize the upload.



5.6 Search

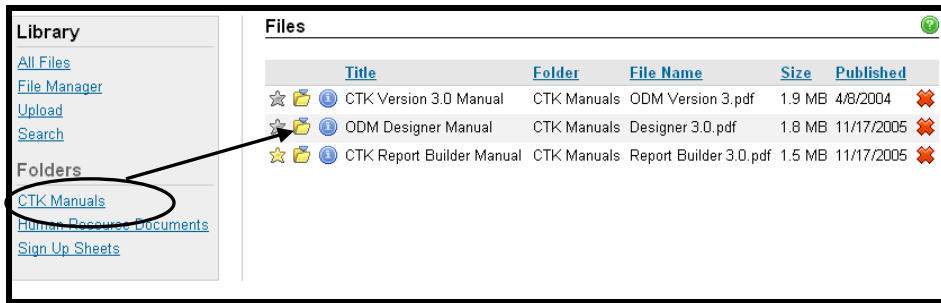
The search option allows a user to **search** for items that are uploaded into the ODM Library. Searches can be done by a variety of different options. The default is to search by **All**.



The screenshot shows the 'Search' section of the ODM Library interface. The 'Library' sidebar on the left has the 'Search' link circled in red. The main 'Search' area contains the following options: 'File Type' (All Types), 'Published by User' (All Users), 'Published by Group' (All Groups), 'Folder' (All Folders), 'Upload Date' (empty text box), and 'Search Title' (empty text box). There is an unchecked checkbox for 'Include Descriptions' and a 'Search' button at the bottom.

5.7 Folders

All folders that have been created through the **File Manager** are listed below the Folders heading. Clicking directly on a **folder link**, will take the user to a listing of items that are in that folder. In the example below, clicking on CTK Manuals takes the user to a screen with just CTK Manuals listed.



The screenshot shows a file manager interface with a left sidebar and a main content area. The sidebar has a 'Library' section with links for 'All Files', 'File Manager', 'Upload', and 'Search'. Below this is a 'Folders' section with links for 'CTK Manuals', 'Human Resources Documents', and 'Sign Up Sheets'. The 'CTK Manuals' link is circled in red, and an arrow points from it to the first row of the file list in the main content area. The main content area is titled 'Files' and contains a table with the following data:

Title	Folder	File Name	Size	Published
CTK Version 3.0 Manual	CTK Manuals	ODM Version 3.pdf	1.9 MB	4/8/2004
ODM Designer Manual	CTK Manuals	Designer 3.0.pdf	1.8 MB	11/17/2005
CTK Report Builder Manual	CTK Manuals	Report Builder 3.0.pdf	1.5 MB	11/17/2005

10. Conclusion

This concludes the CIODM User Manual.

While this manual is comprehensive, CTK is certain that it will not cover every possible option available for the use of the CIODM and its capabilities.

Please contact CTK's Account Management staff or Technical Support Desk with any additional questions or clarification.