CIODM User Guide 3.9.1

Community TechKnowledge
TECHNOLOGY WITH A HEART

Table of Contents

1. Introduction

Setting Your Browser for the ODM

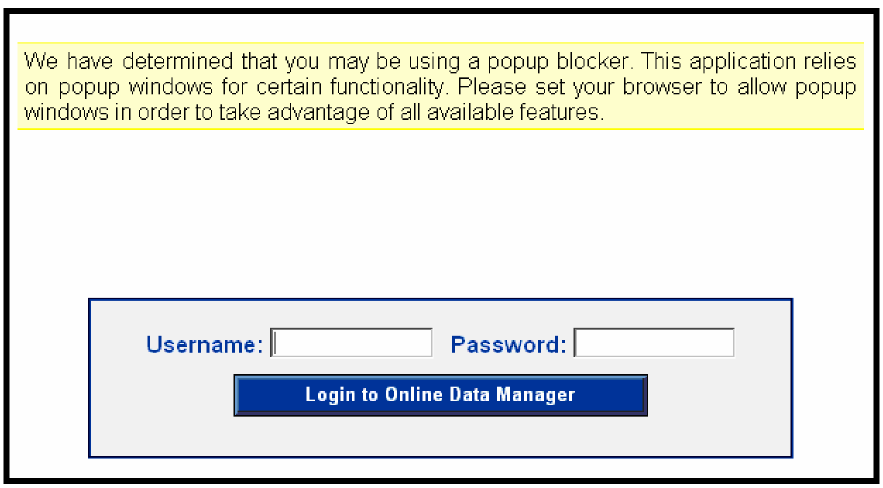
Welcome to the CTK CIODM User Manual.

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.



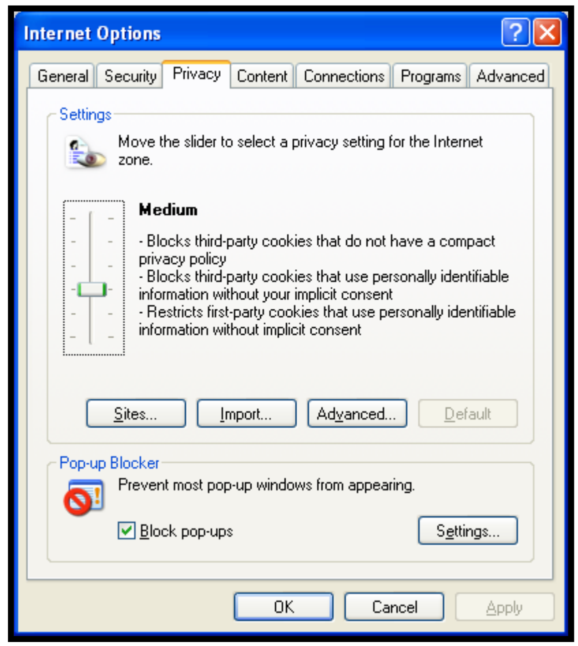
This message will not appear once the popup blocker has been disabled for this site. Please keep in mind also, that popups can be blocked for only certain sites.

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:

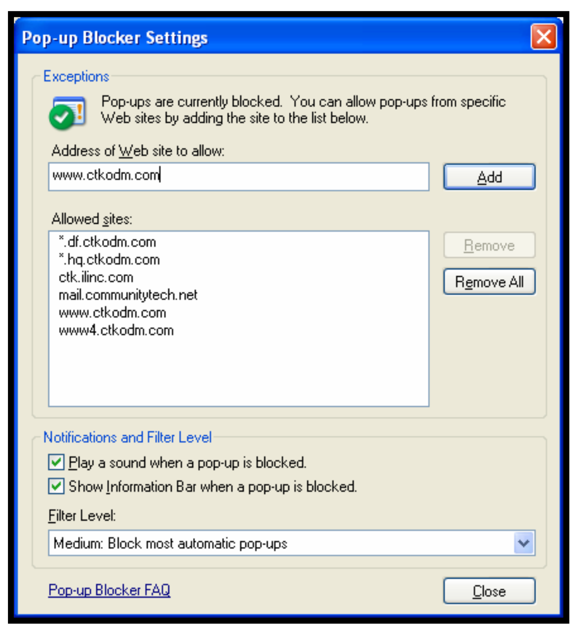
It could be that the computer has **Windows XP Service Pack 2**, which automatically adds a pop-up blocker to **Internet Explorer**. This pop-up blocker can be adjusted as follows:



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.ctkodm.com" in the field in the middle of the section for adding sites to accept pop-ups from. Then click the "Add" button.



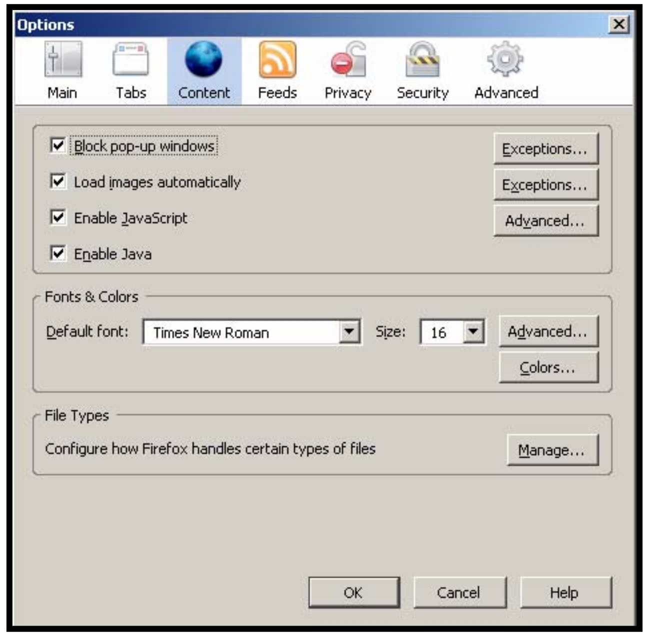
When "www.ctkodm.com" is seen in the list of sites, click close. This will take the user back to the Privacy tab in Internet Options.

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:

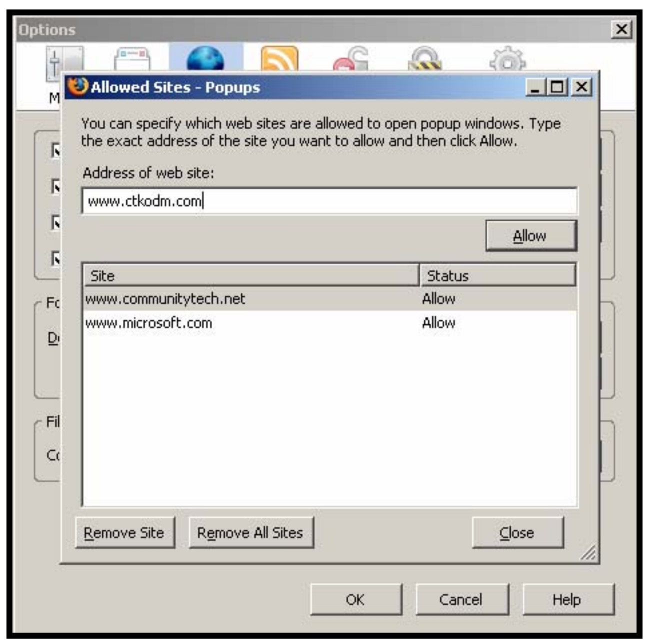
Open a Firefox window and click on Tools at the top. Then select Options.

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.ctkodm.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.ctkodm.com/Your ODM.



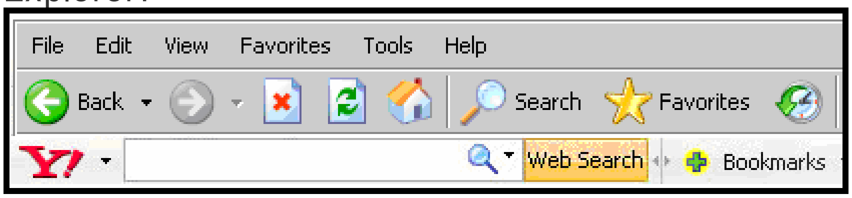
After adjusting these options, click OK to save the changes and close the Options window.

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

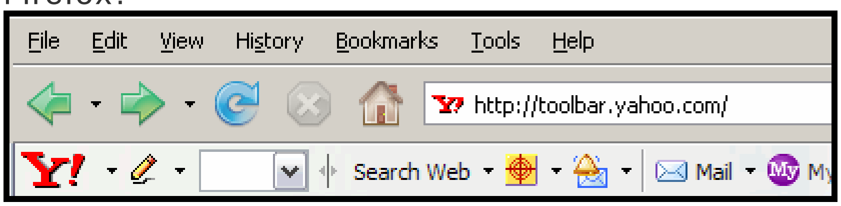
To adjust these toolbars:

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:

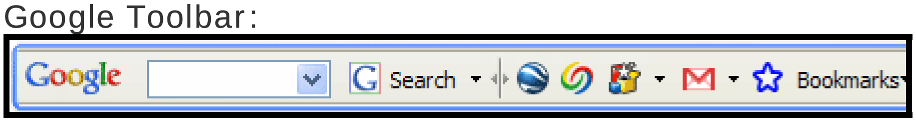


Firefox:



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

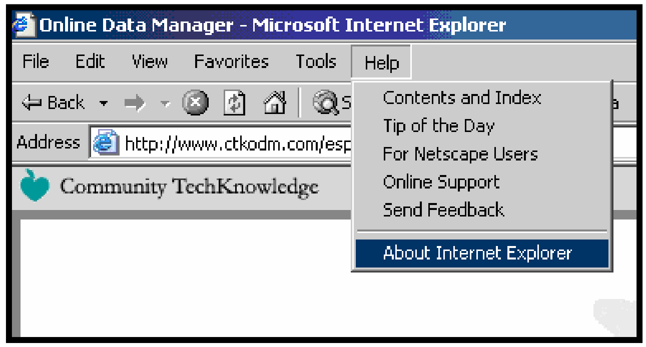
http://www.microsoft.com/windows/downloads/ie/getitnow.mspx

NOTE FOR EXPLORER 7 USERS:

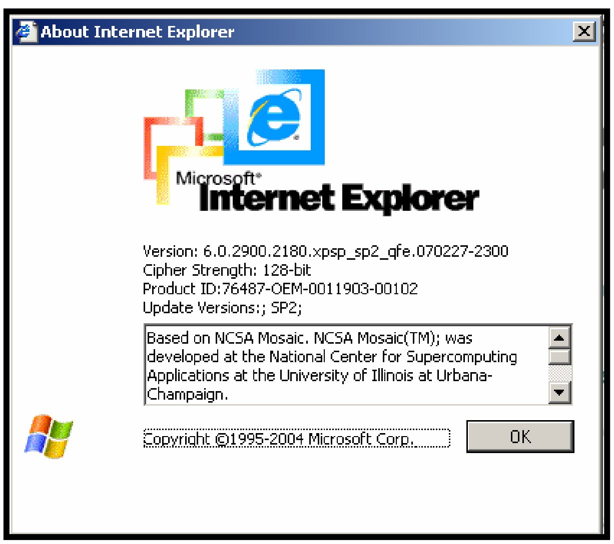
Currently, the ODM program has some minor browser issues with IE 7. The program functions and works correctly, but a few windows are difficult to read. CTK is committed to working with Microsoft products for complete operability.

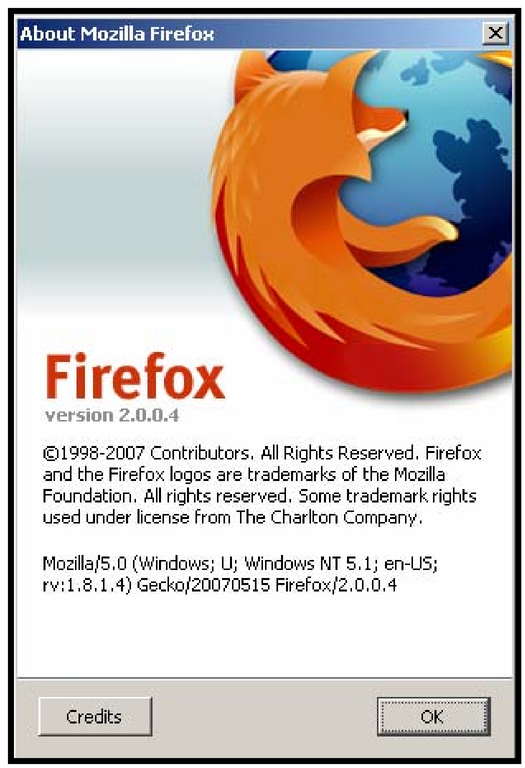
Full compatibility is expected by Fall, 2007.

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 labled "About..." followed by whichever browser you use.



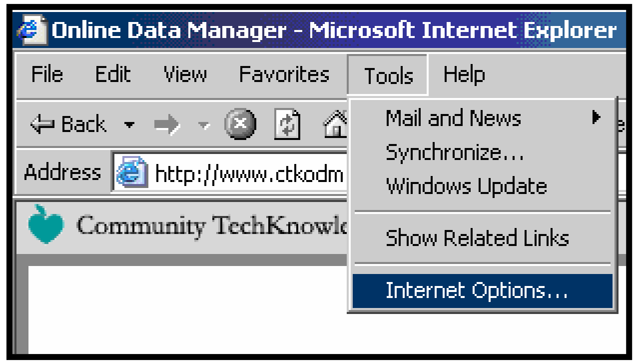
A pop-up window will appear with the version of the browser you are using. Explorer will show the cipher strength as well. Firefox supports up to 256-bit encryption, and is safe to use, but has other pitfalls this manual will discuss in the next section.





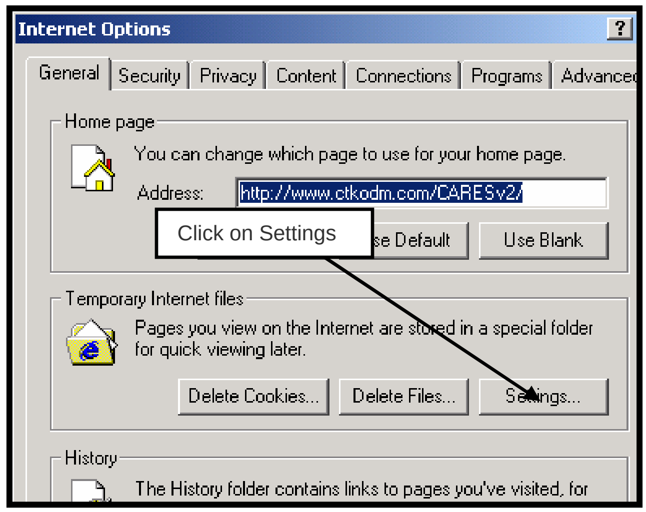
1.4 Caching

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.

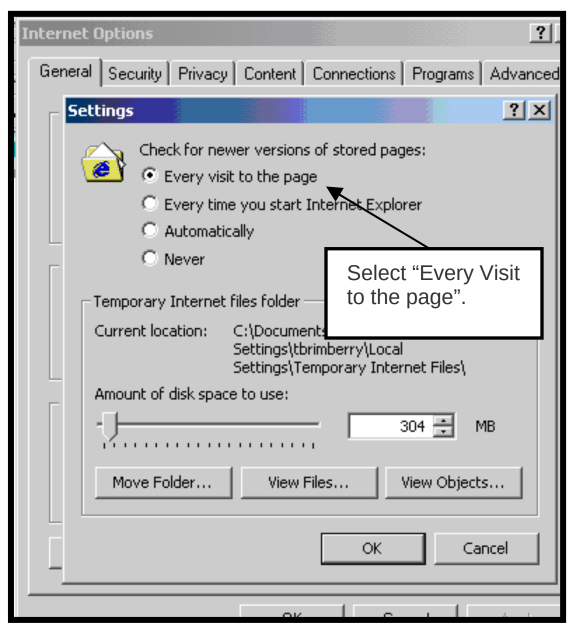
Click on the "Settings" button in that section.



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.

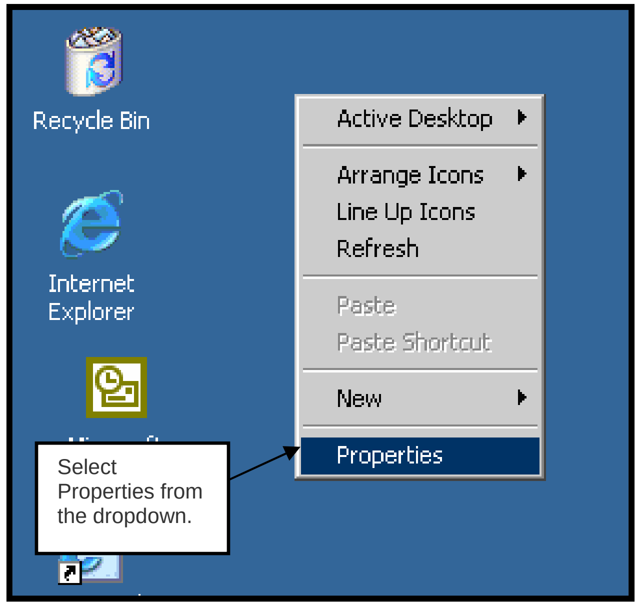
Click OK again to close out the Internet Options box.



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.

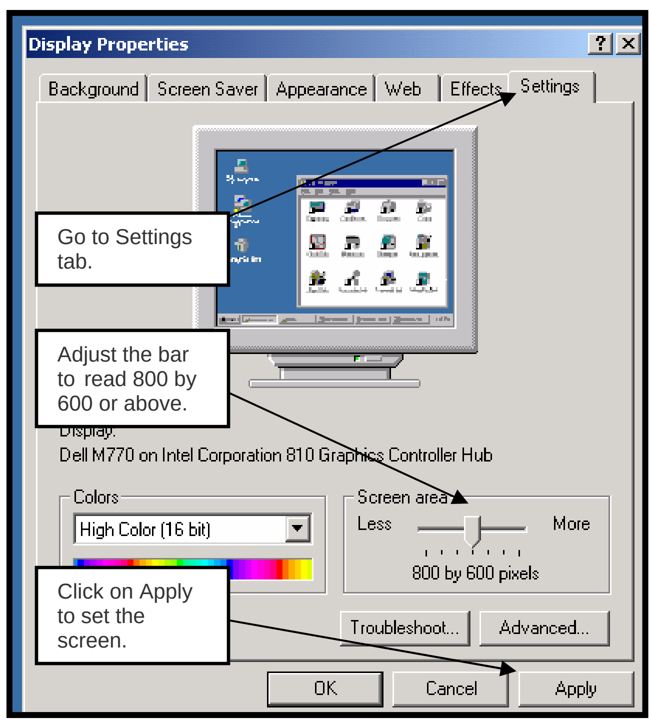
However, this can vary depending on the type of monitor being used. Many modern monitors are in a “widescreen” format, or function at a higher resolution than 800 x 600.



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.

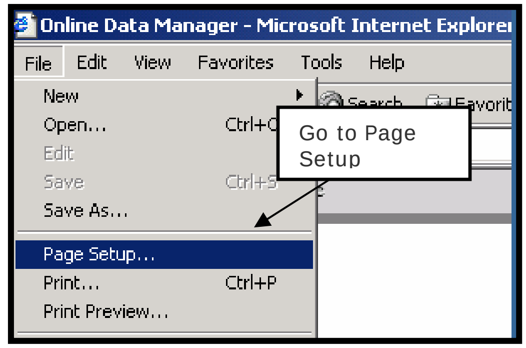


On the settings tab, go to Screen Area. Move the screen resolution bar to read 800 by 600, or the appropriate setting for the computer.

Click “Apply.”

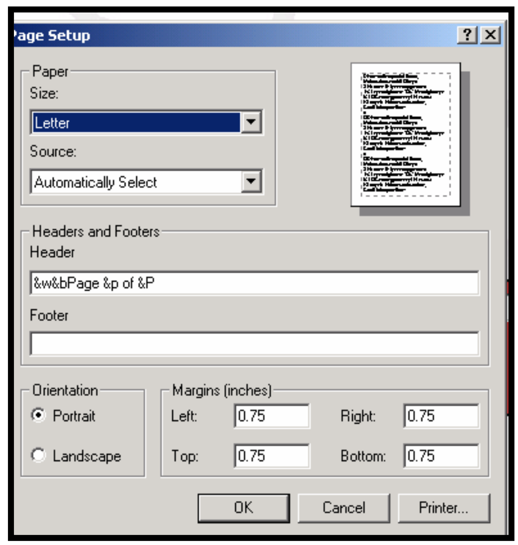
1.6 Printer Settings

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.



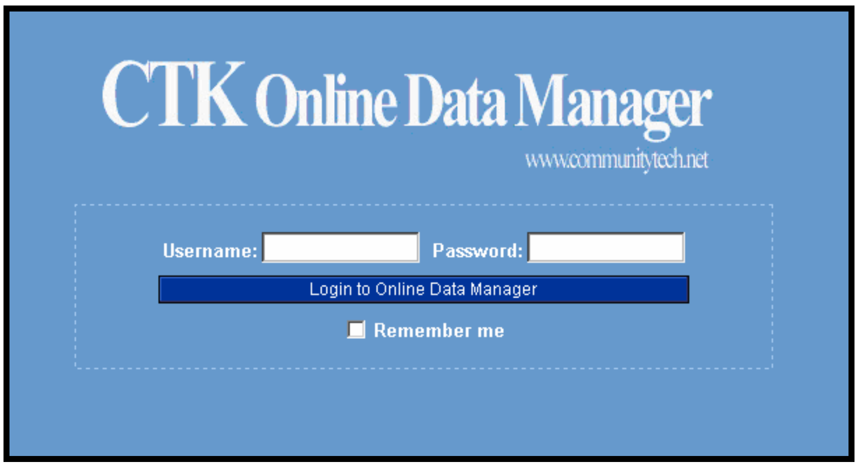
Select OK to save the changes.

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.ctkodm.com/, and will include the identifying organization name at the end, such as www.ctkodm.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:

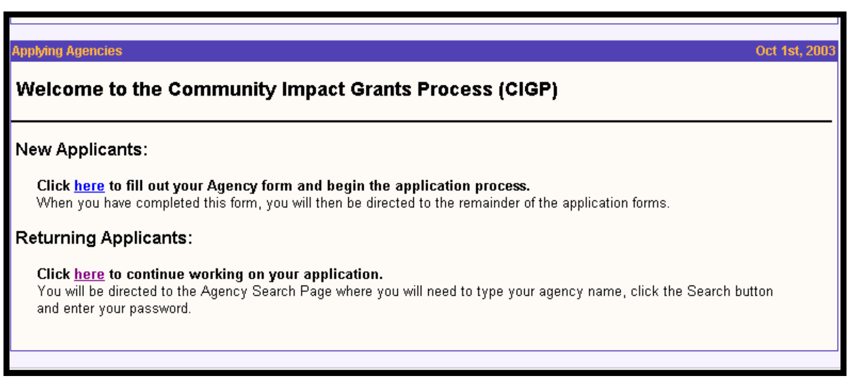
Security and confidentiality. The User Profile both restricts and gives permission to access various areas of the ODM to certain users. Which areas a user may access, and what they may do there, are granted by the ODM System Administrator. Password changes and updates are also determined by the Administrator.

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.

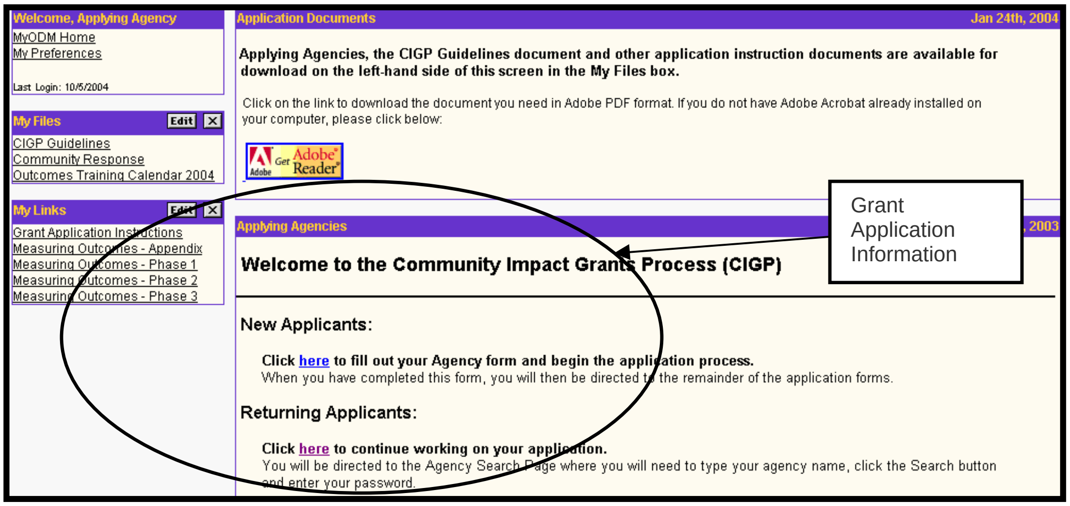
2.3 Grant Bulletin

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.

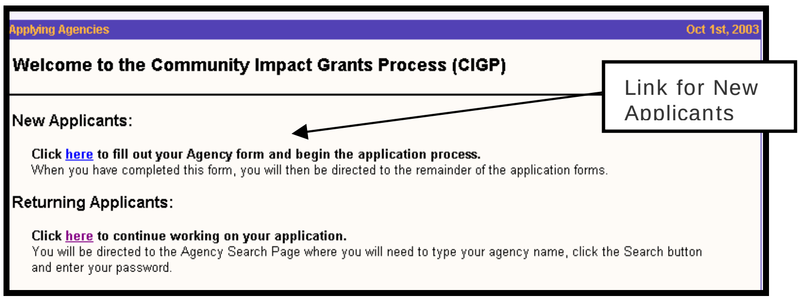
Returning Applicant refers to those who have either already started the application process, or have applied before.



3. Grant Application

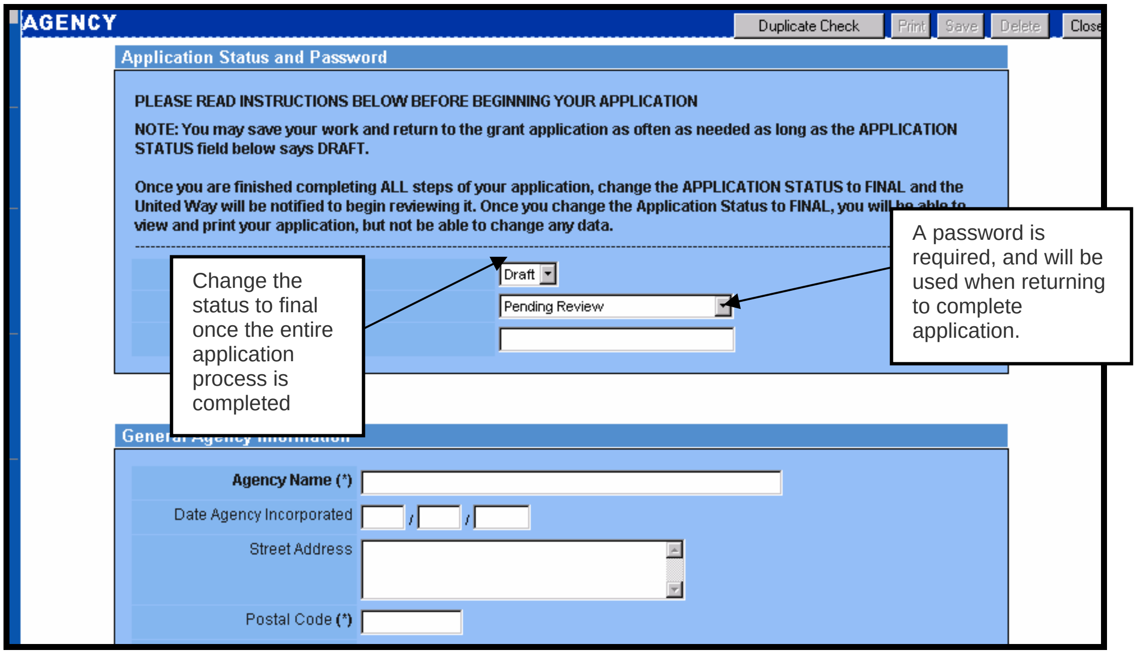
3.1 New Applicant

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.

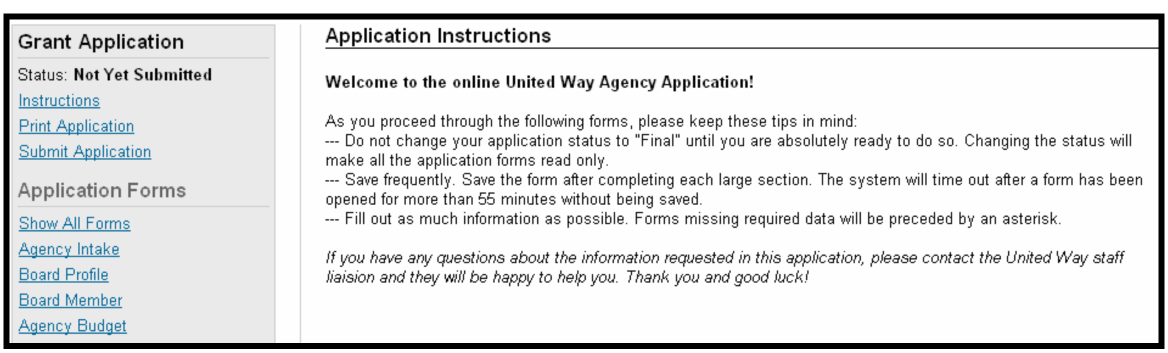
Once the status is changed to Final, the Applicant will be unable to edit any of the application forms.



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.

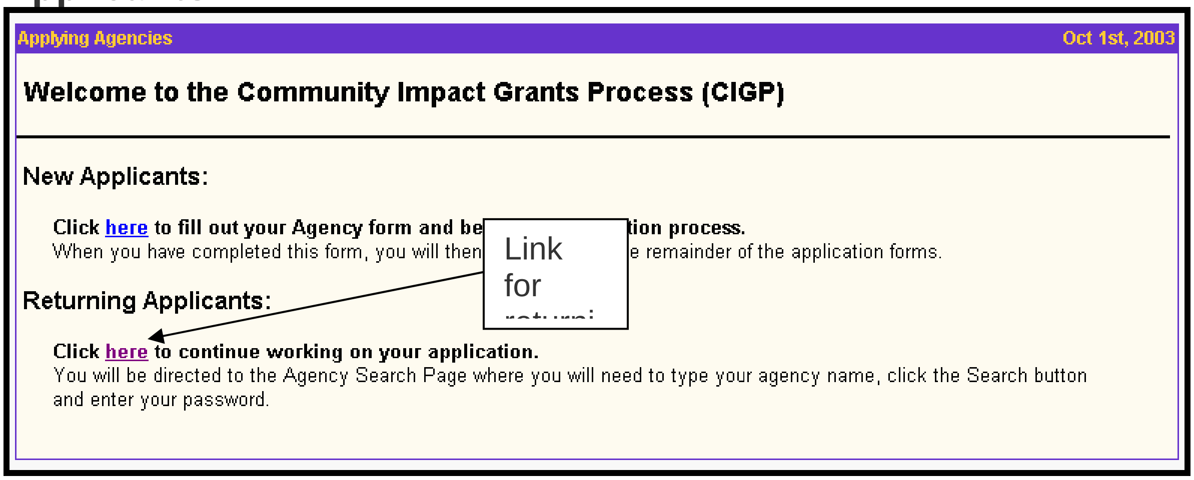
On the left hand side of the screen, the applicant's **status** is listed, along with a list of all options available to the user for the application process. In addition, there is the ability to see all of the forms in the application process, or to view each form individually. Each of these options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

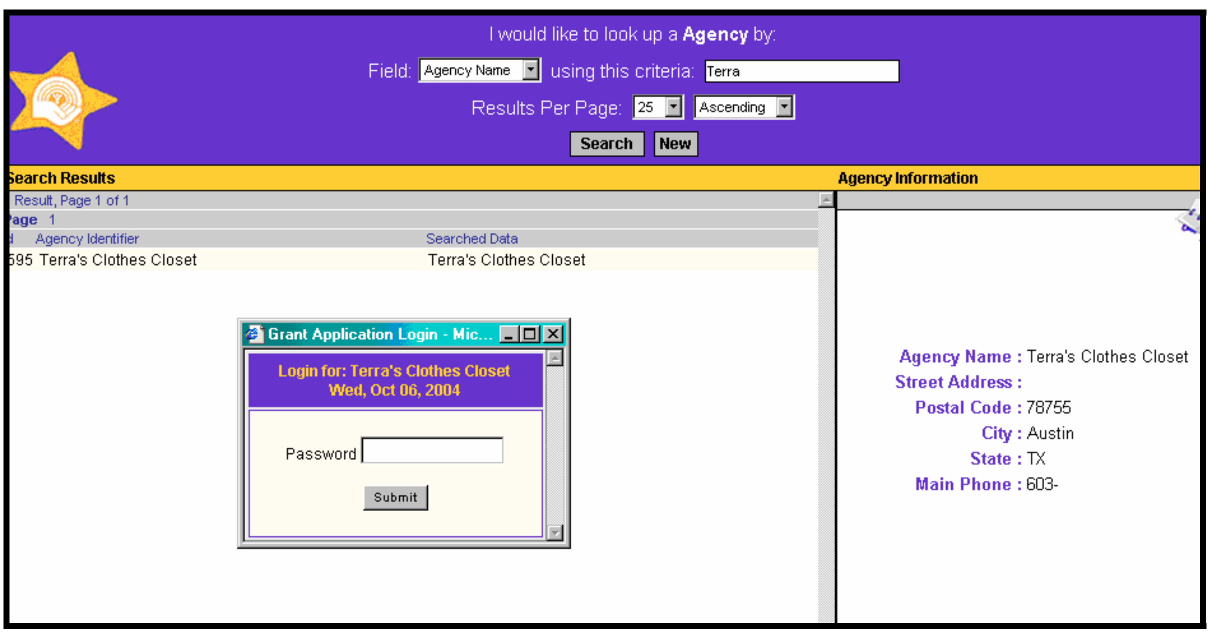


3.2 Returning Applicant

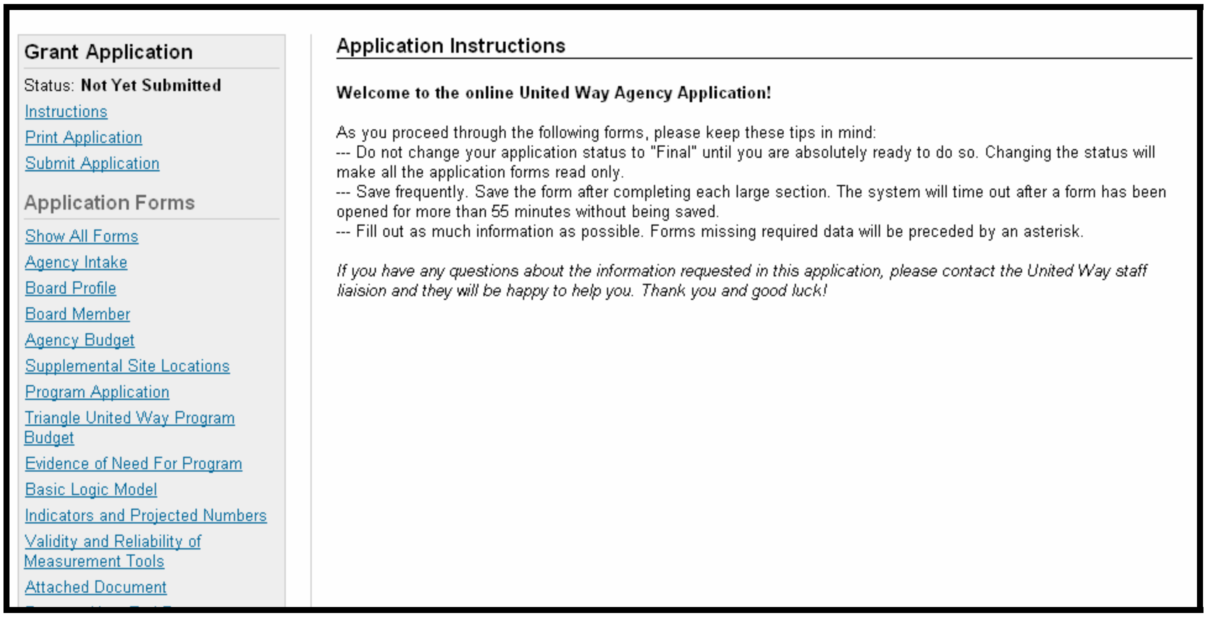
At any point during the application process, the Applicant can return to the CI ODM to continue working on the application. The Applicant enters the CI ODM using the same generic User Name and Password. However, this time, the Applicant clicks on the link for **Returning Applicants**.



The **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.



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.

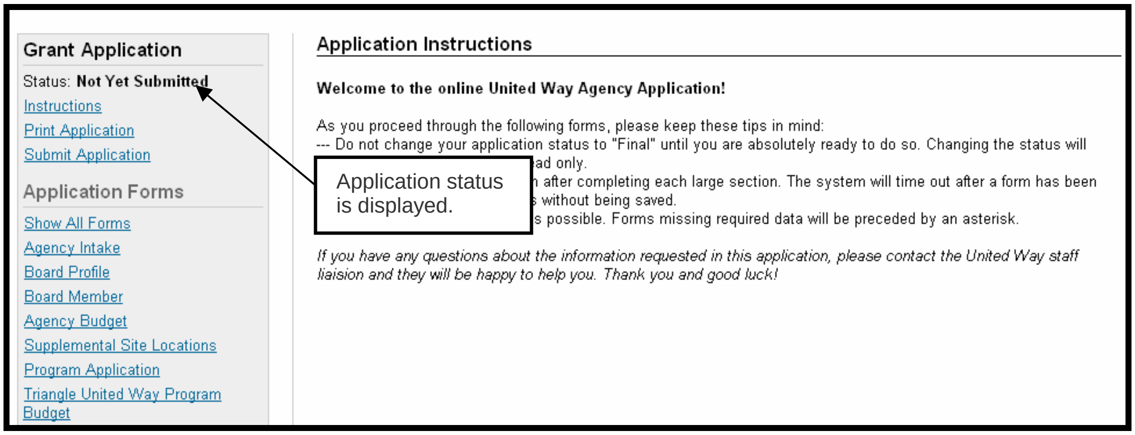


3.3 Grant Application Tools

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.

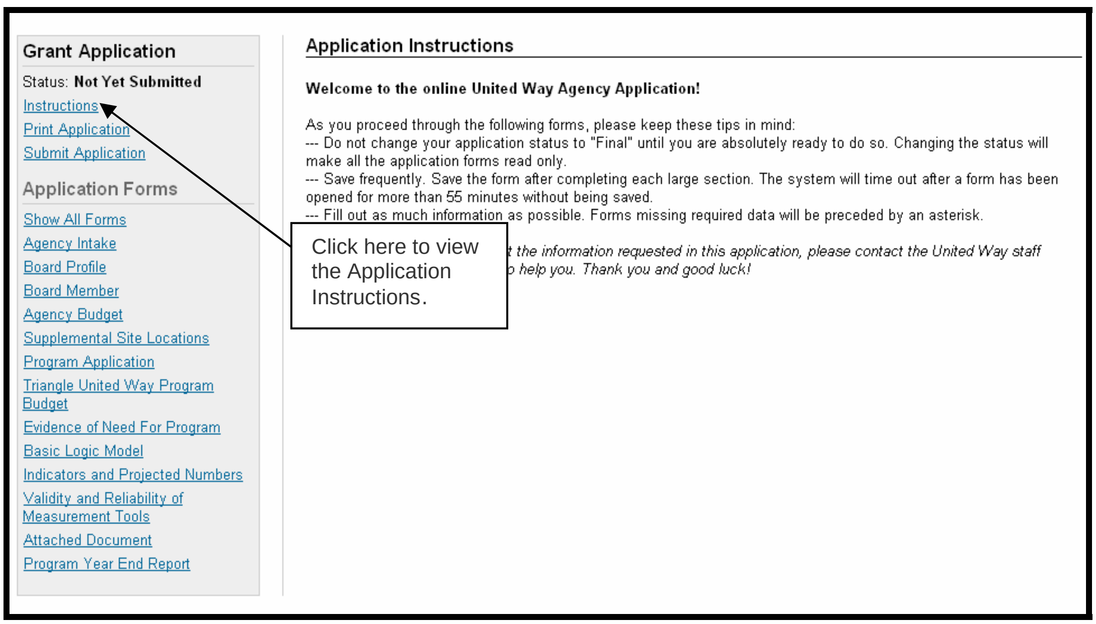
Application Status

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.



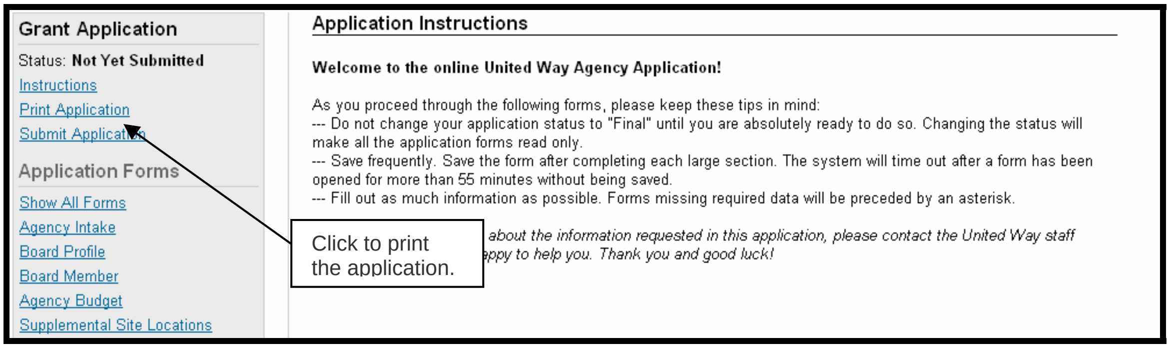
Application Instructions

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.

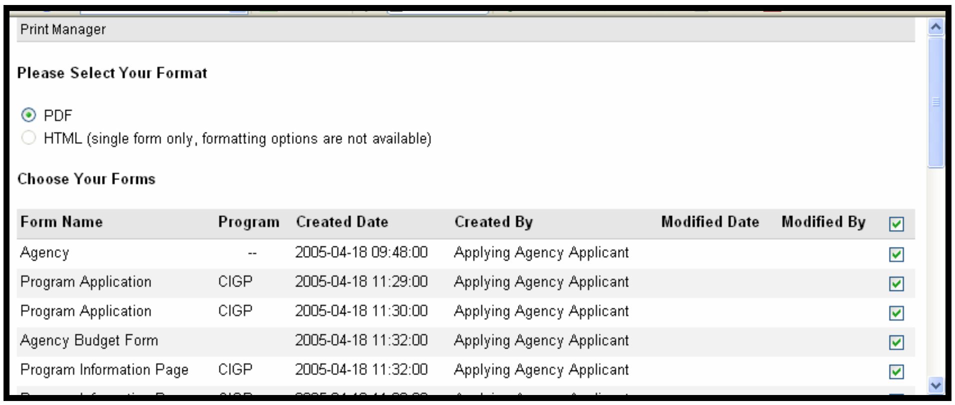


Print Application

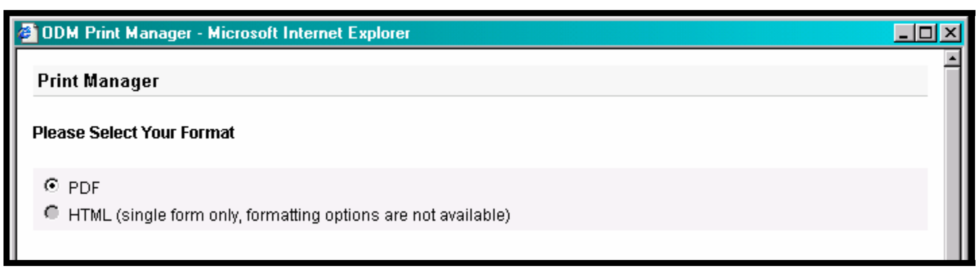
At any point during the application process, the user can **print** the application by clicking on the **Print Application** link.



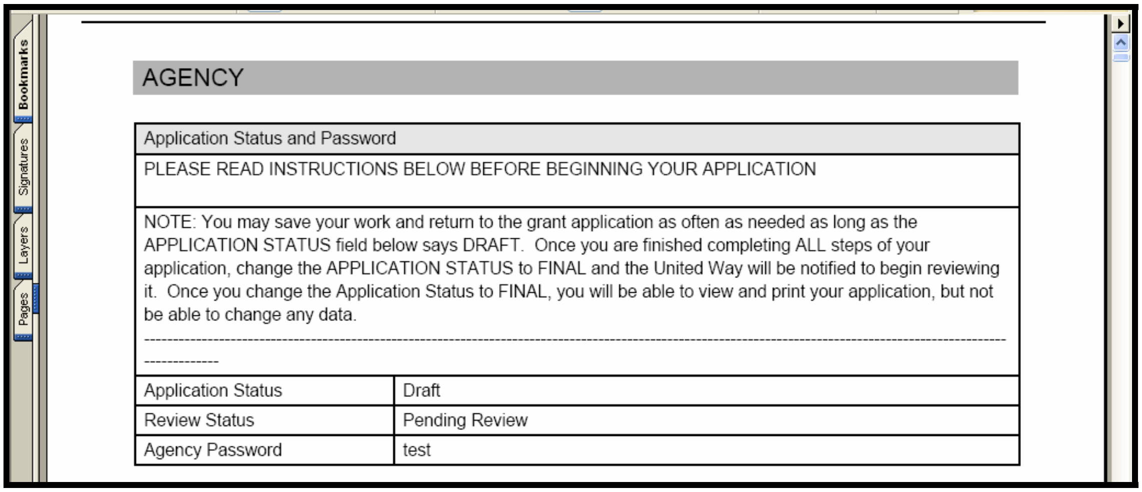
Clicking on Print Application activates the ODM Print Manager.



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



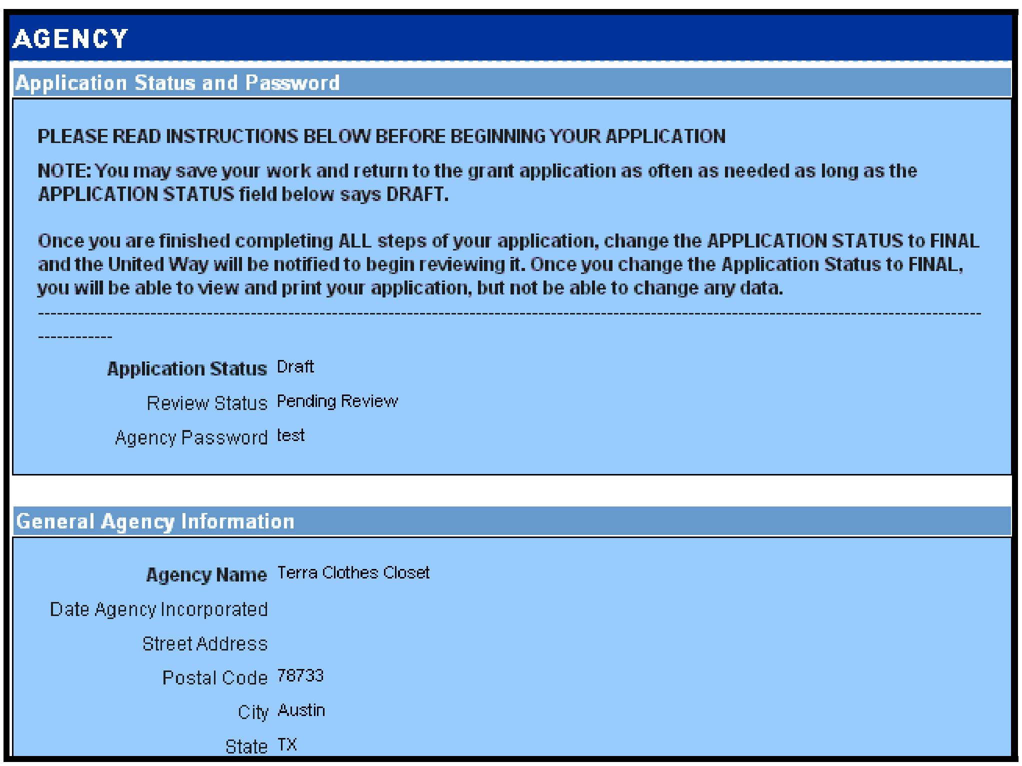
PDF (Portable Document Format) is a universal file format that preserves the fonts, images, graphics, and layout of any source document, regardless of the application and platform used to create it. Go to http://www.adobe.com/products/acrobat/adobepdf.html for more information regarding PDFs and to download 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.

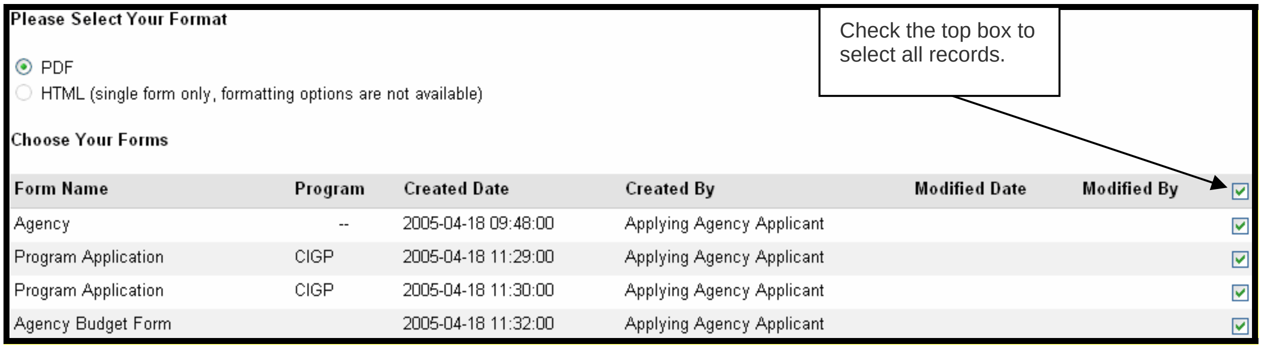
Application Status	Draft
Review Status	Pending Review
Agency Password	test

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

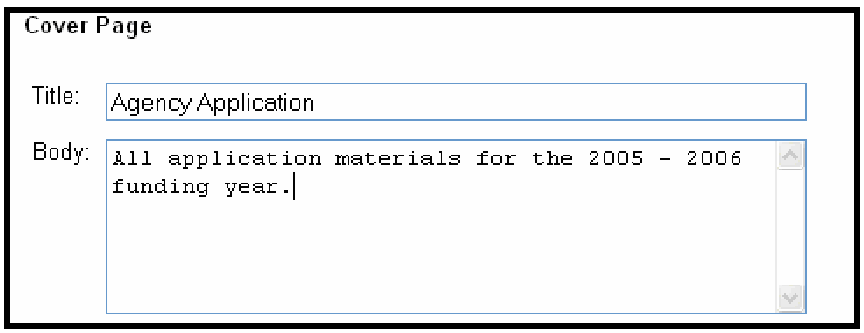
HTML (single form only, formatting options are not available)

Check the top box to select all records.

Choose Your Forms

Form Name	Program	Created Date	Created By	Modified Date	Modified By	
Agency	--	2005-04-18 09:48:00	Applying Agency Applicant			
Program Application	CIGP	2005-04-18 11:29:00	Applying Agency Applicant			
Program Application	CIGP	2005-04-18 11:30:00	Applying Agency Applicant			
Agency Budget Form		2005-04-18 11:32:00	Applying Agency Applicant			

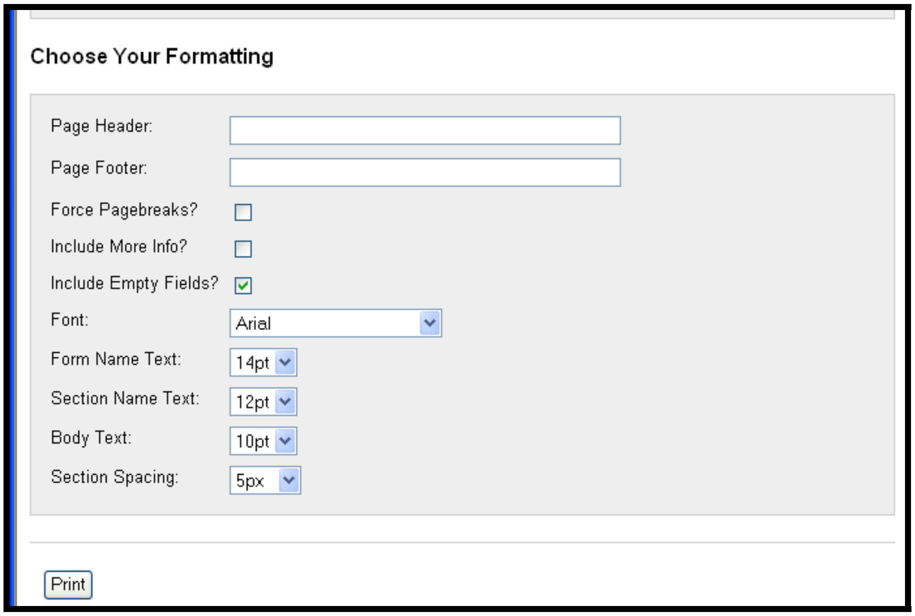
Cover Page - The third option is to set up a **cover page**, if desired. When information is entered into the **Title** and **Body fields**, the Print Manager will generate a cover page displaying the information entered.


Cover Page

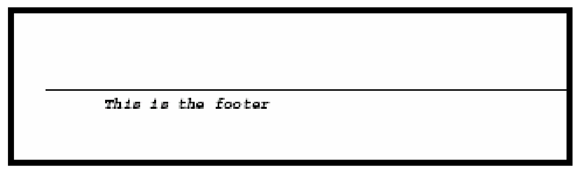
Title: Agency Application

Body: All application materials for the 2005 - 2006 funding year.

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



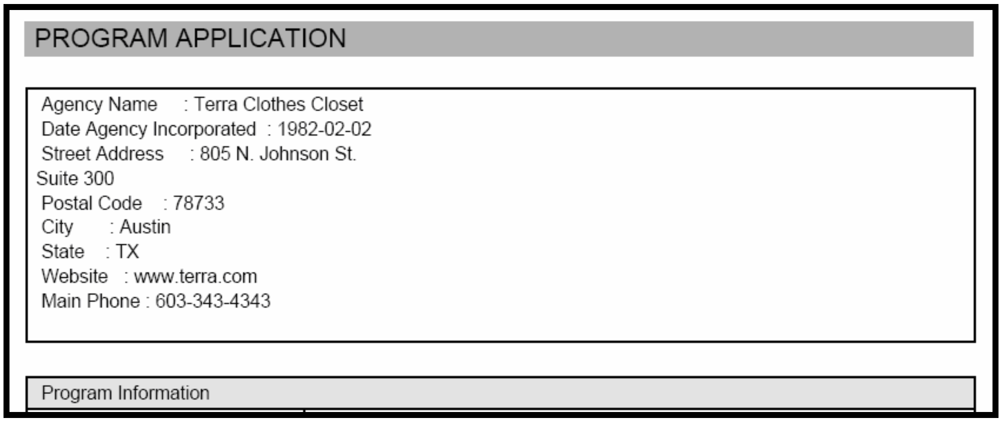
Page Header and Footer – Enter information in these text areas to create a line of information that will appear on the top or bottom of each printed page. This could be the date, agency information, etc.



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?"

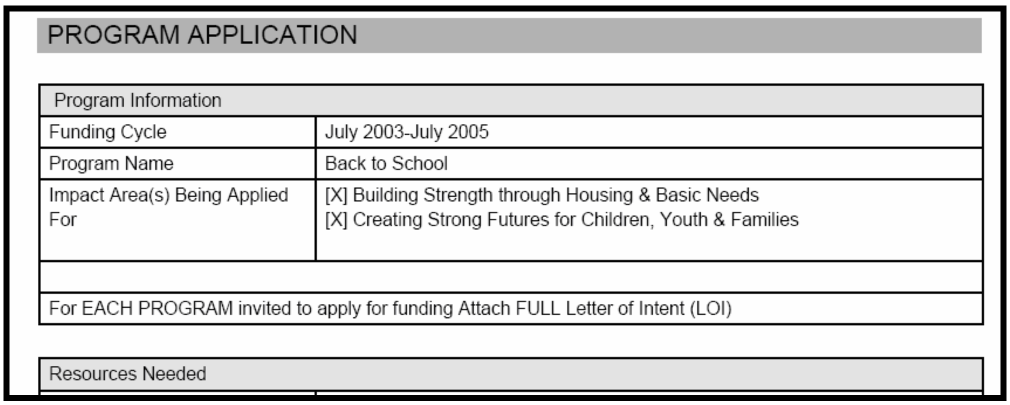


PROGRAM APPLICATION

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?"

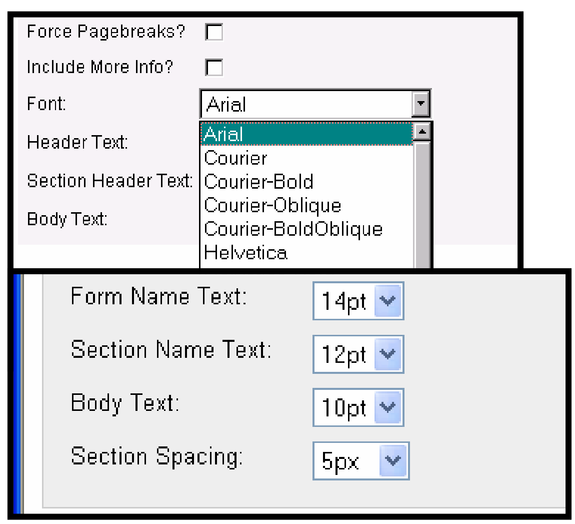


PROGRAM APPLICATION

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

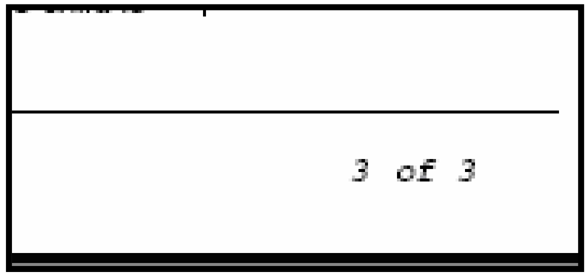
1. Include Empty Fields – This option allows for only fields with information entered appearing on the printed form.



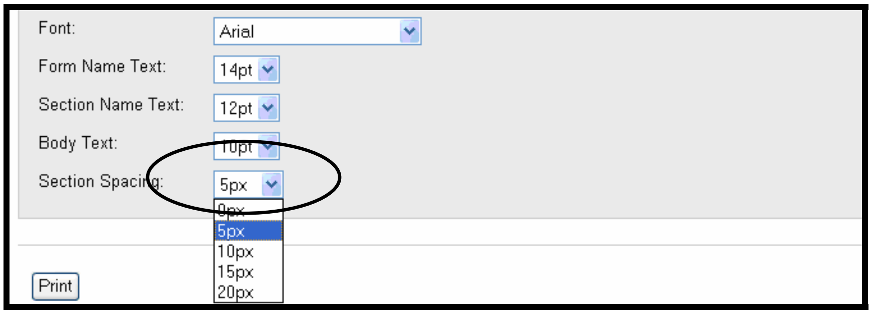
2. **Font** – The Font dropdown allows the User limited selections of desired fonts for the printed forms.

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.

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.

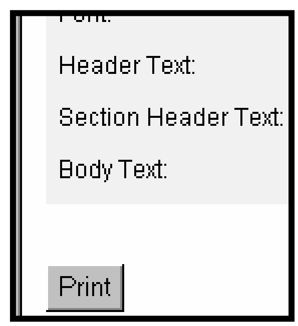
0px

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

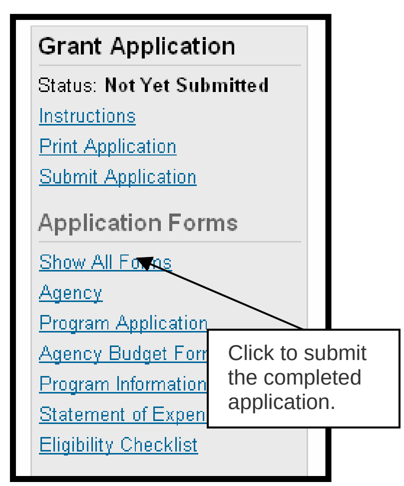
Medicaid Number	
Social Security Number	343-43-4343
DFPS Client Number (2085 number)	
Facility ID (where the child is currently placed)	
Home ID	5
Level of Care	
Current Level of Care	
LOC Effective Date	
LOC Expiration Date	
LOC History	
Assignments	
Case Manager	
CM Assignment Date	
Therapist	
Therapist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

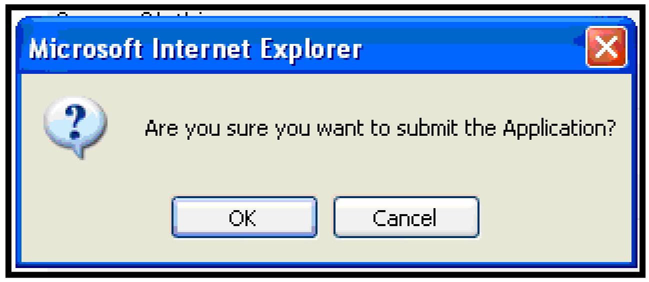


Submit Application

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



Once Submit Application is selected, a box appears that verifies that the application is **ready for submission**.



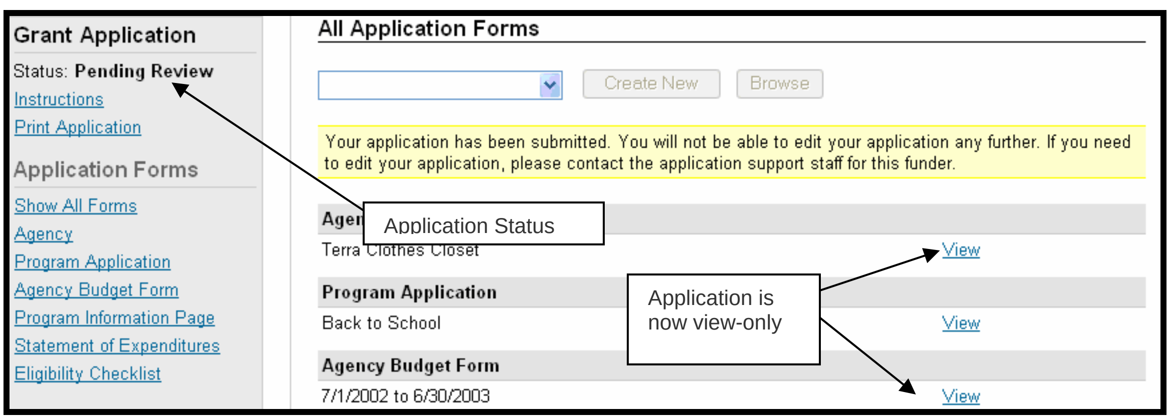
Once an application is submitted the user will not be able to edit it, and will only have the ability to view or print the application. In addition, an **email notification** will be sent to the funding organization, notifying them of the status change.

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.



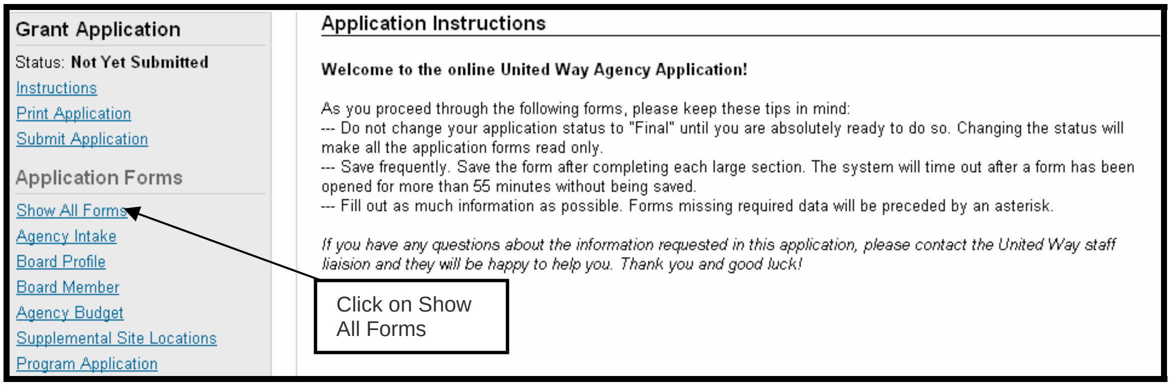
THIS CONCLUDES THE CHAPTER ON GRANT APPLICATIONS.

4. Application Forms

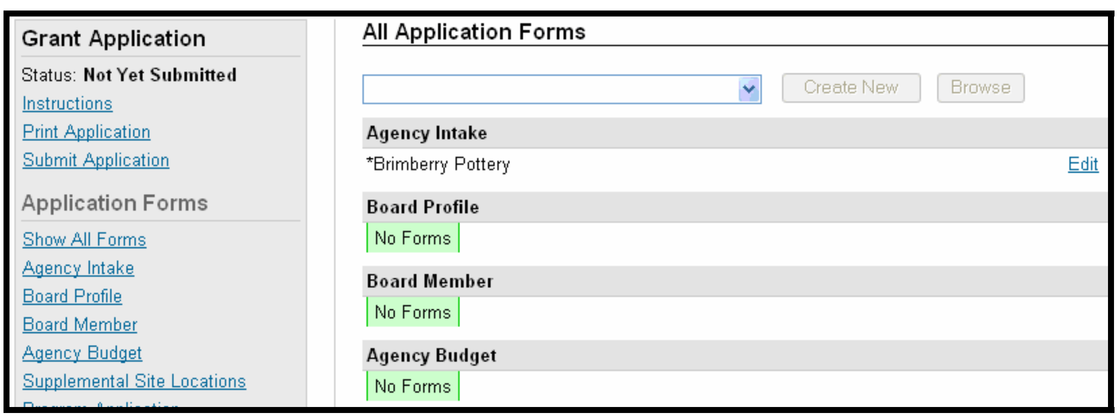
On the left hand side of the screen under **Application Forms**, there is a link for **Show All Forms** and underneath is a link to every individual form that is part of the application process.

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.

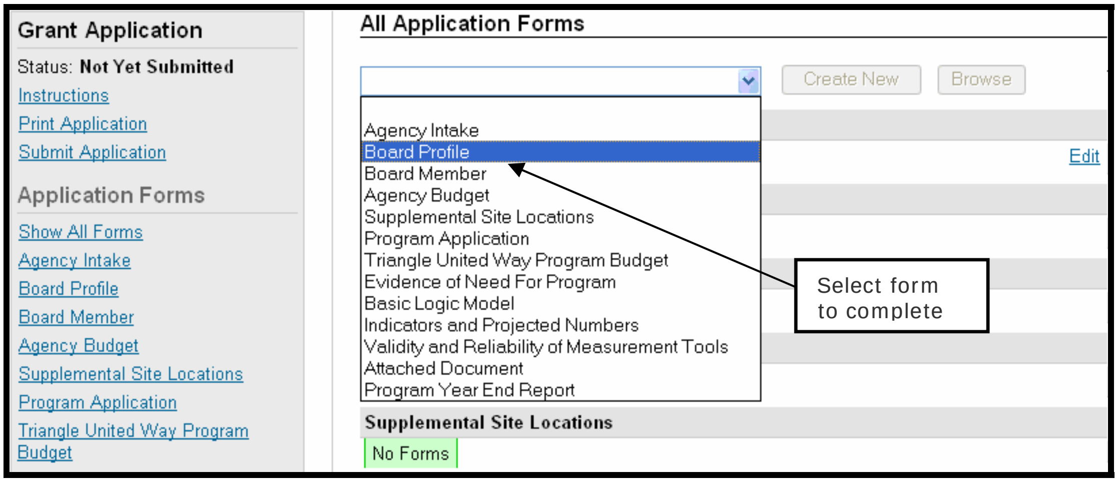


This will take the user to a screen where all the forms are listed, along with the ability to **create** or **edit** the forms. Until additional forms are completed, the only option is to “Edit” the Agency form. “**No Forms**” is displayed under all of the other forms, until at least one is completed.

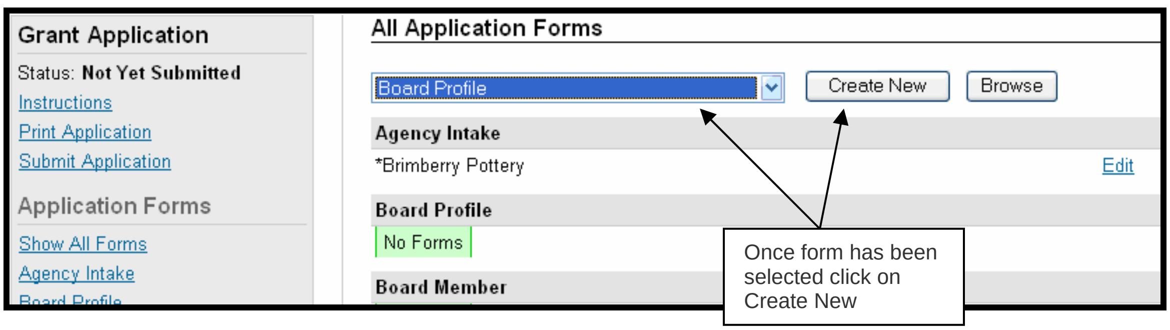


Create Forms

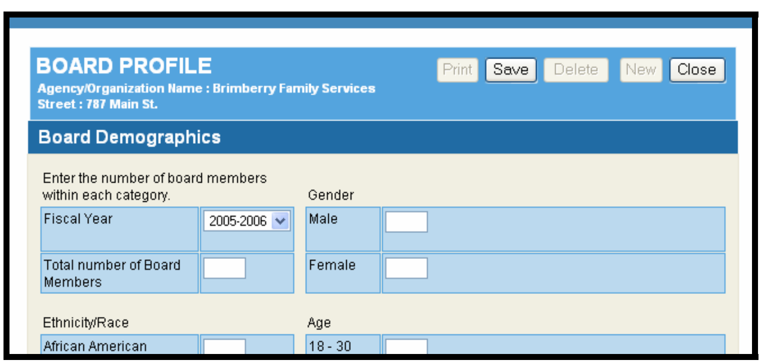
To create a new form, select that form from the top dropdown.



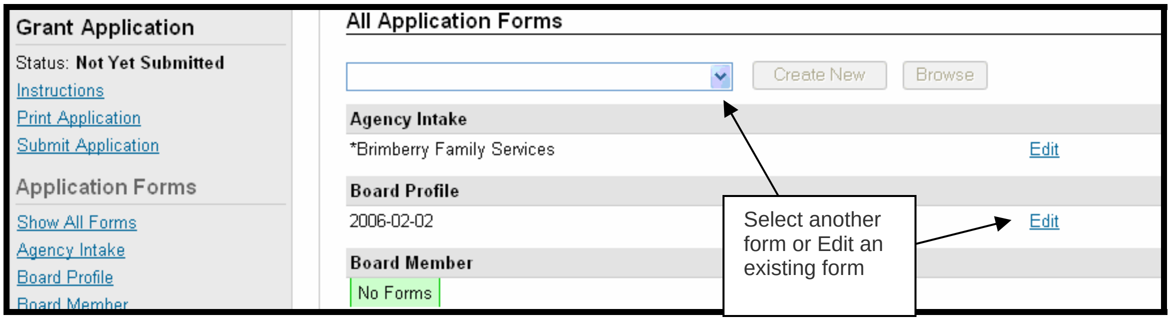
Once the form has been selected, click on **Create New**.



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

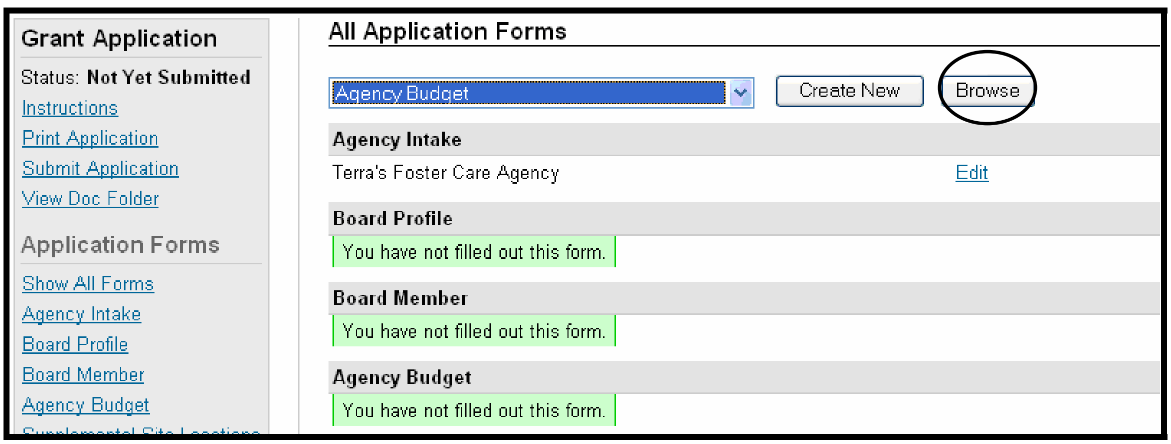


Once the form has been saved, the user will be taken back to the list of **All Forms**, and now the user can select another form from the dropdown, or edit an existing form, by clicking on **Edit** next to the corresponding form.

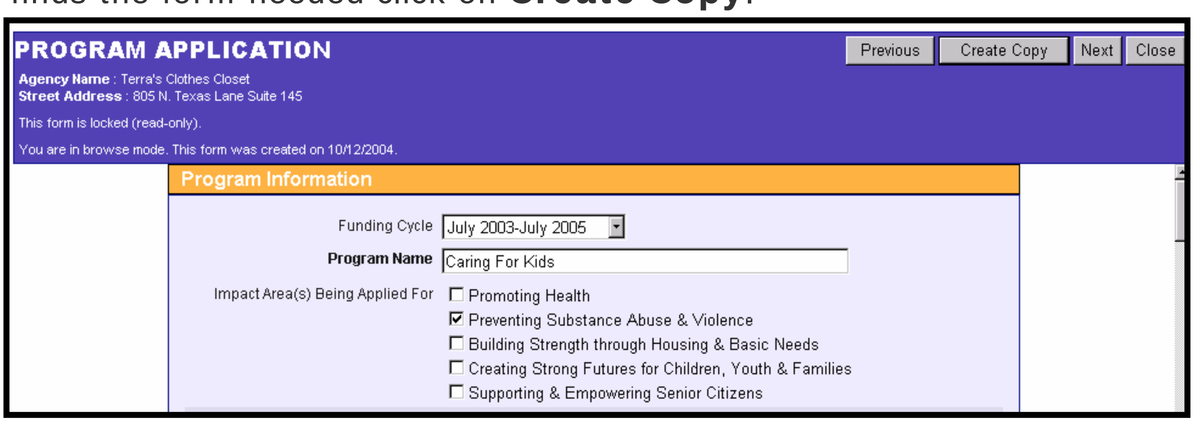


Browse

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**.

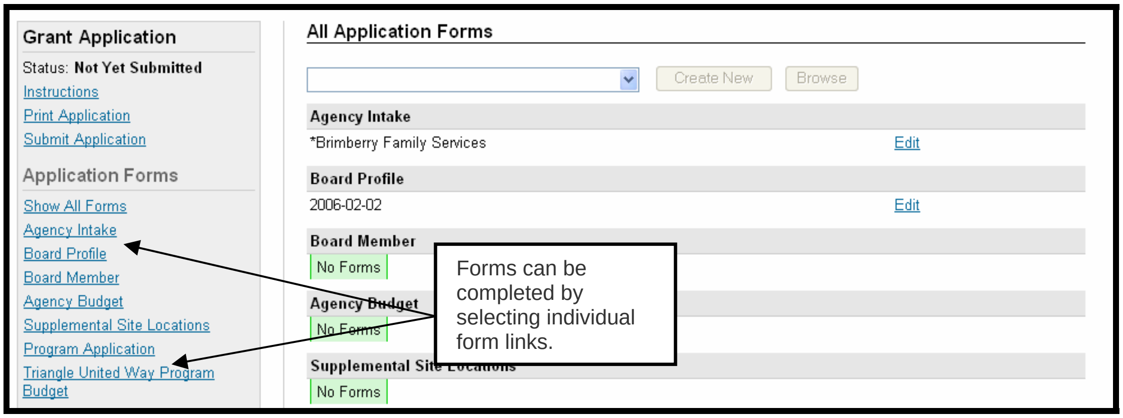


The **Browse** button allows the applicant to look at previous versions of the same form that were created in previous applications. The applicant can navigate between multiple forms by using the **Next** and **Previous** buttons at the top of the each form. Once the applicant finds the form needed click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

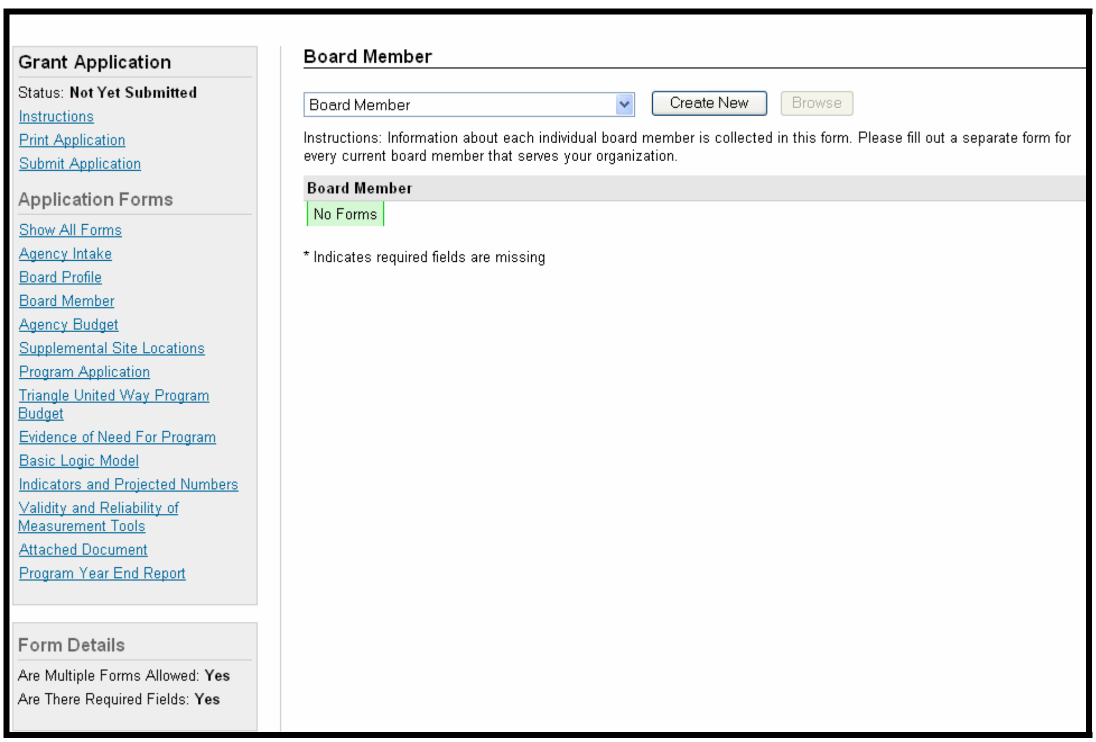


4.2 Selecting Individual Forms

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



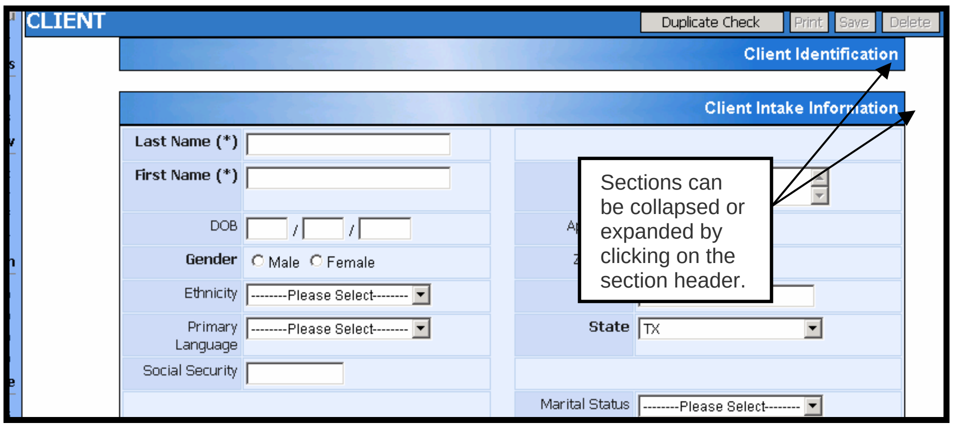
When this option is used, the user is also able to view additional information regarding that specific form. The same dropdown is at the top, but the selected form is already in view, so the user only has to click on **Create New** or **Browse** (if available).



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.

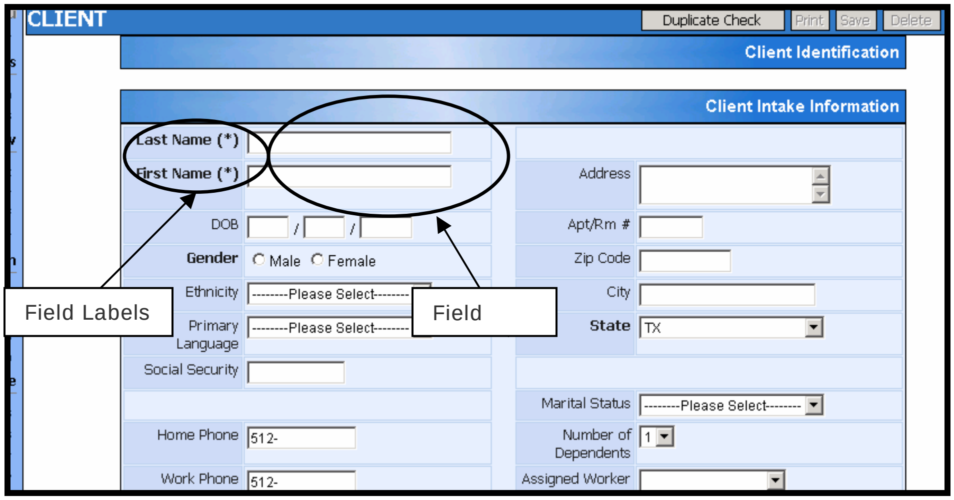
Forms can be made of **multiple sections**, and some sections are collapsed when a form is opened, and the user must **"click"** on the section to open it. This **collapse** functionality is agency defined.



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.

CTK Community TechKnowledge
TECHNOLOGY WITH A HEART



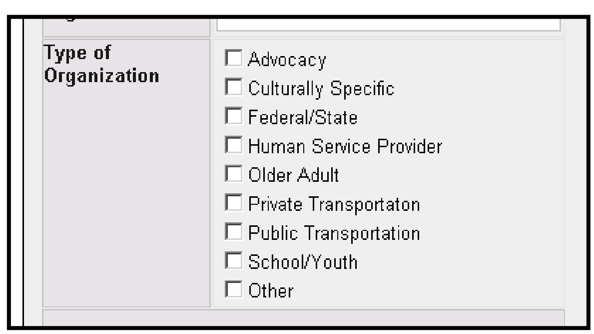
Date Fields

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

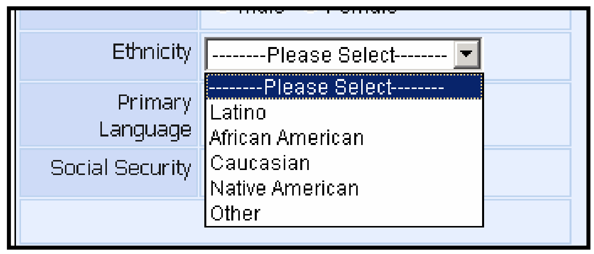


When there is a square box, this indicates a check can be placed next to the appropriate selection. Click once on the box to add a check. If this box does not need to be checked, click again and the check will disappear.

Narrative or Comment Fields

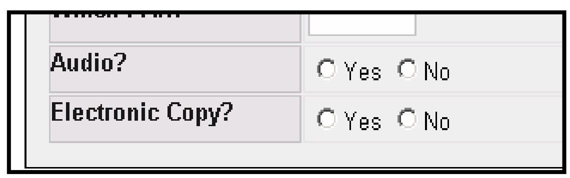
A “Comment” or “Narrative” field is a larger space to write any amount of text. Click in the box and begin typing.   If the organization has specified a character limit, the box will stop allowing input once the limit has been reached.

Drop-down Lists



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

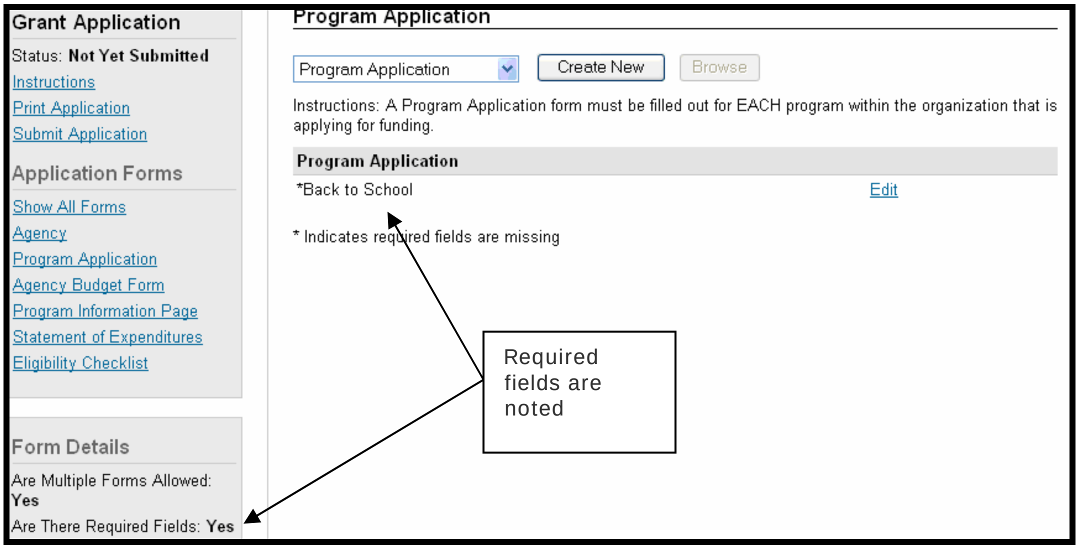
Radio Buttons



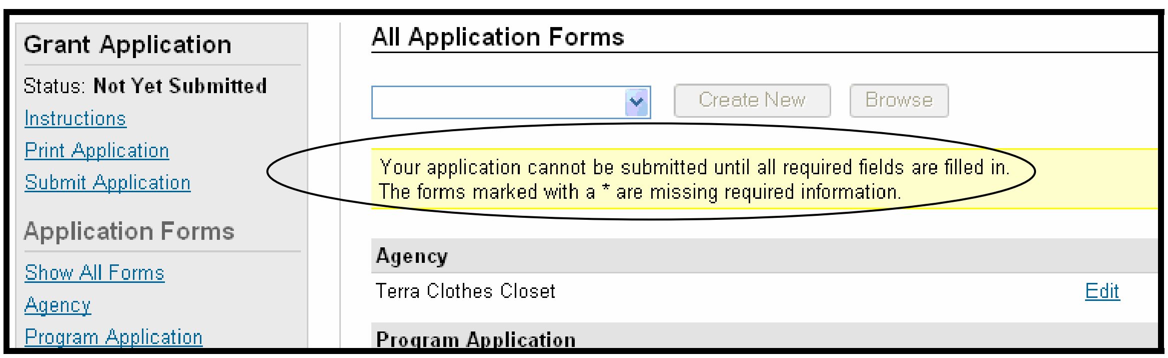
Similar to check boxes, radio buttons have a circle next to each option. While checkboxes allow multiple selections, only one selection can be made in a radio button field.

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.

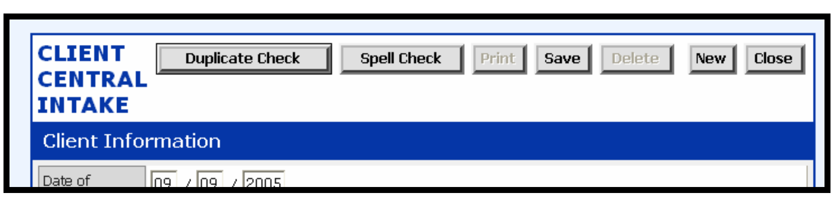


Required fields are activated once an application is submitted. If an application is submitted without all of the required fields completed, a note will appear on the Grant Application screen, and the submission will not be completed.
See example of an application with incomplete required fields below.



4.4 Action Buttons

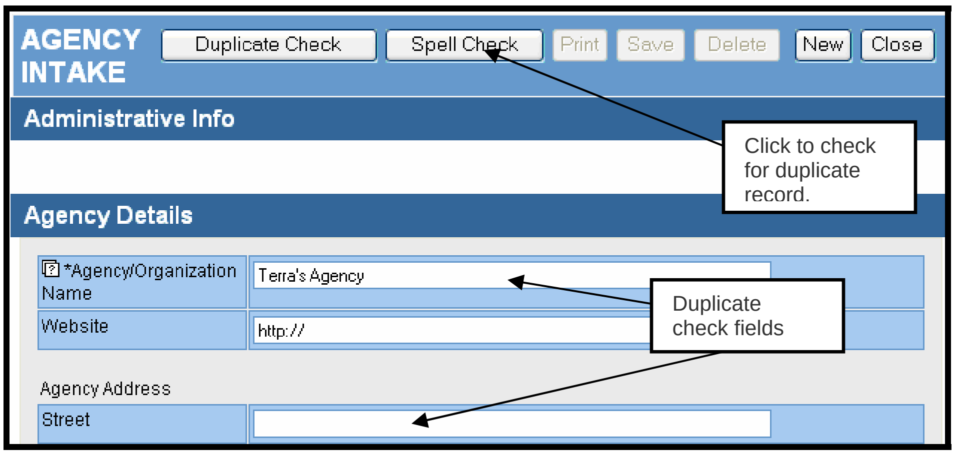
Finally, there are action buttons in the header of each form.



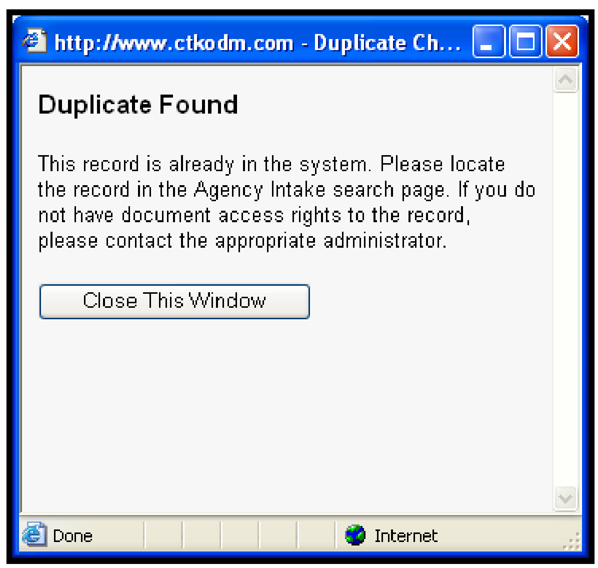
Duplicate Check

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.



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.

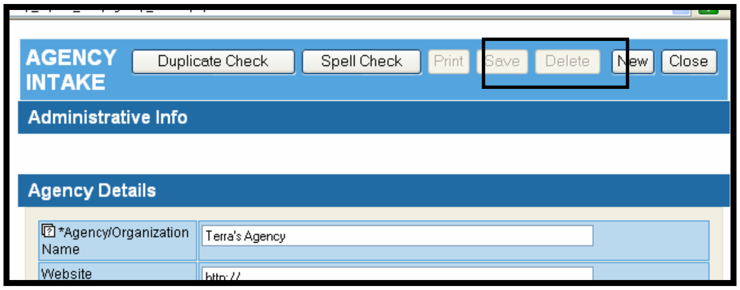


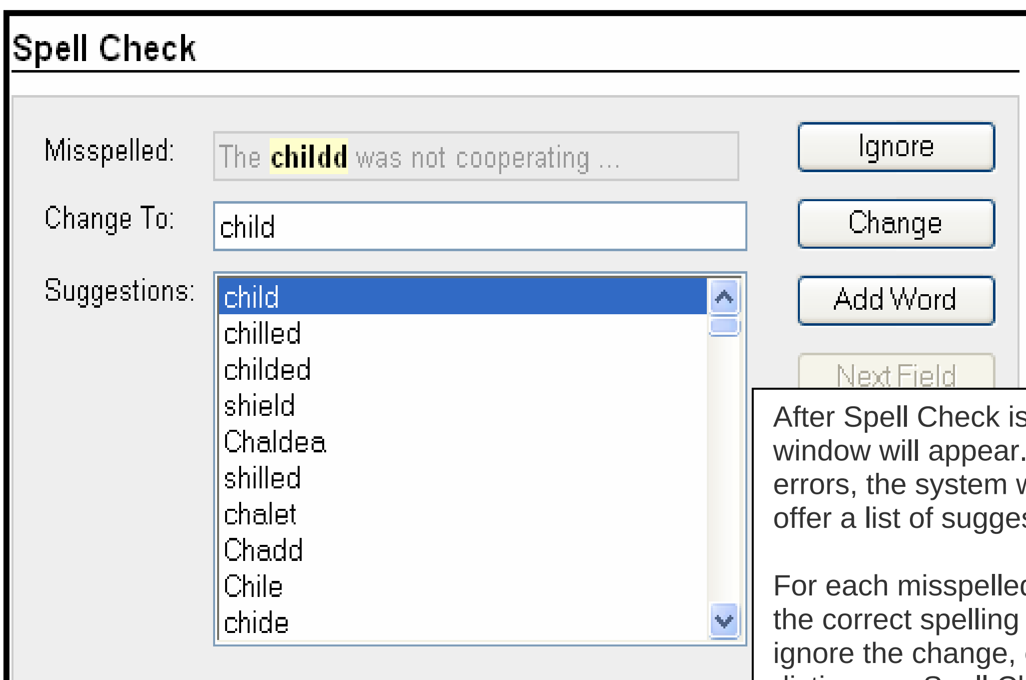
Spell Check

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.

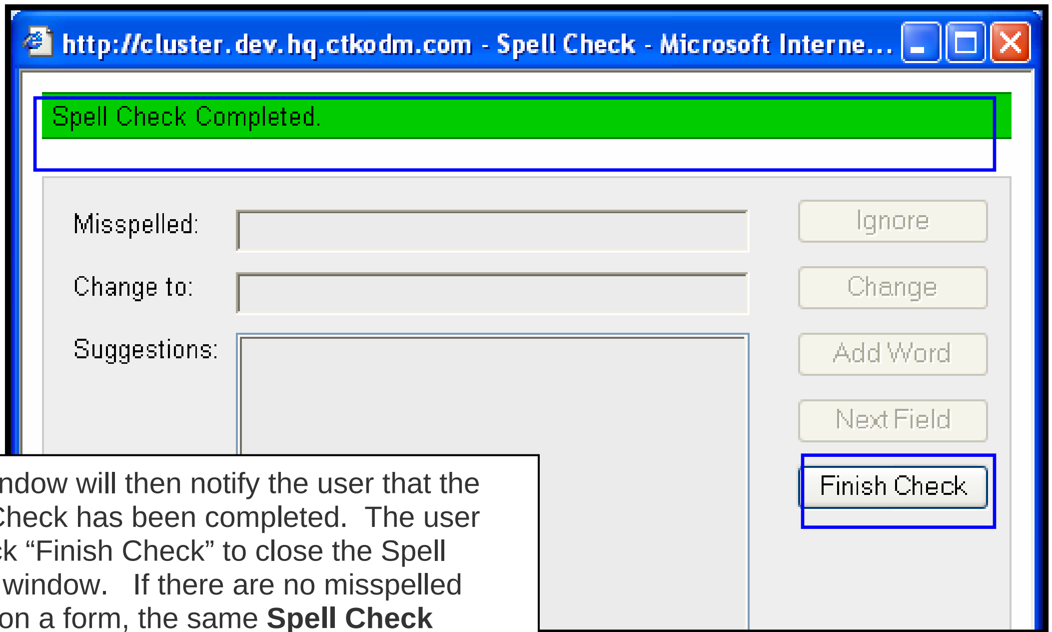
When **Spell Check** has been added to a form, a **Spell Check button** will appear at the top of the form in the CI ODM. To check the spelling for all text boxes and text areas on the form, click "**Spell Check**."





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.

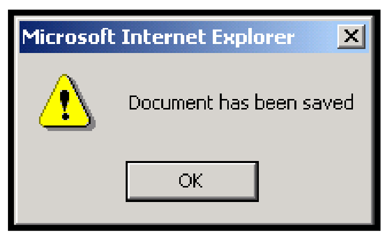
For each misspelled word, the user can select the correct spelling from the provided list, ignore the change, or add the word to the dictionary. Spell Check will continue to move from word to word and field to field until all of the misspelled words are identified.



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.

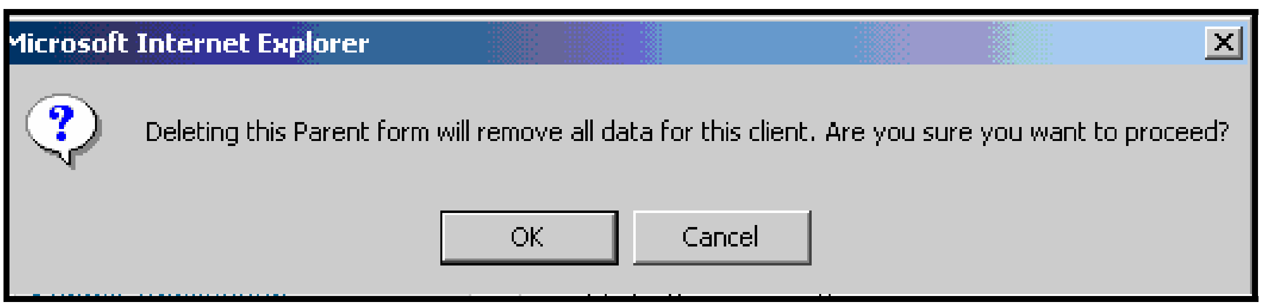


If a user attempts to save a form before filling in required fields, a pop-up window will appear with a list of all fields that need to be completed.

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

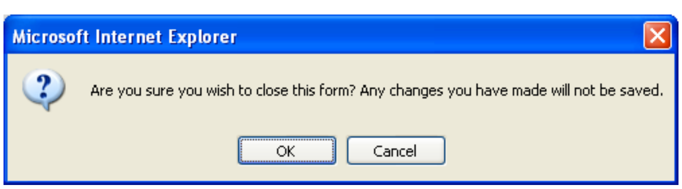
Delete Button

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.



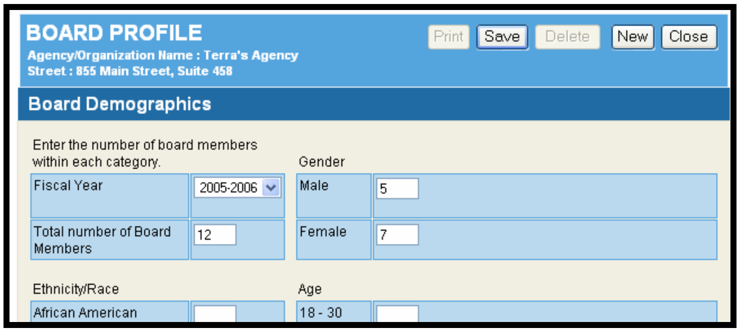
Close Button

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.

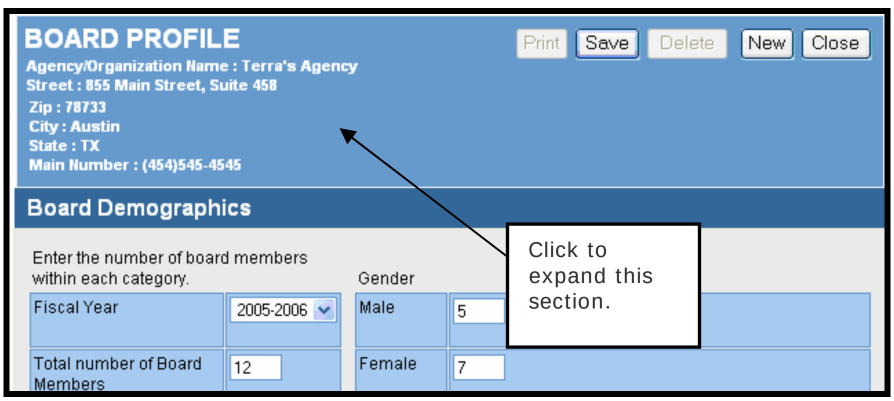


Additional Information

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.



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.



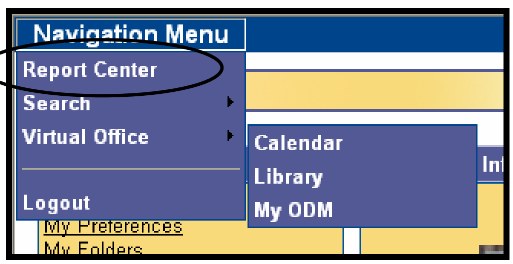
THIS CONCLUDES THE CHAPTER ON APPLICATION FORMS.

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:

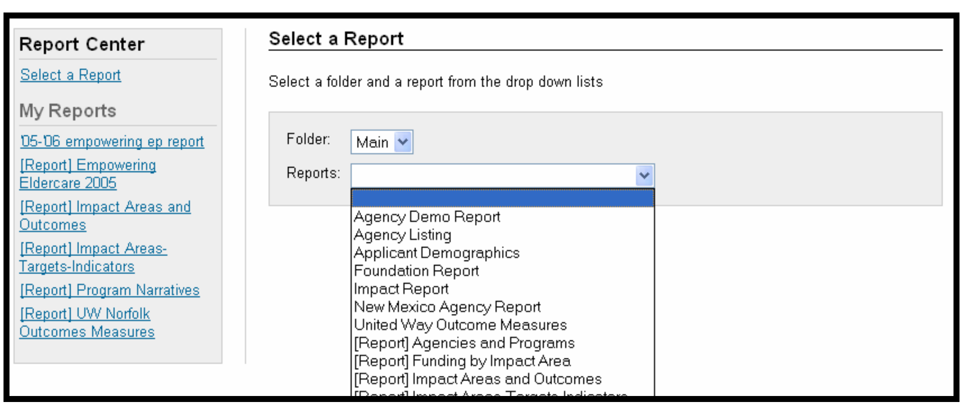
5.1 Report Center

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

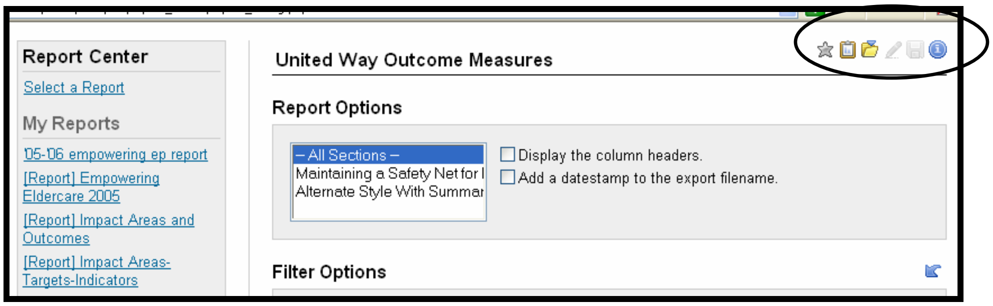


Select a Report

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.

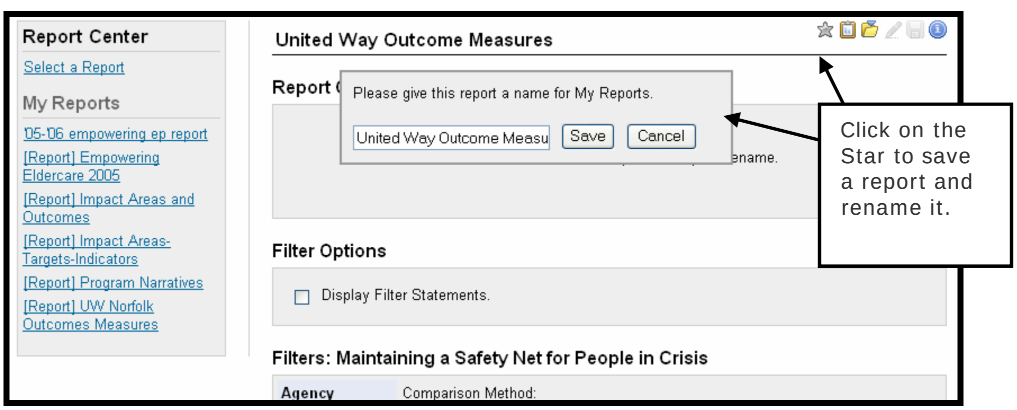


5.1 Report Center Icons

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

Save to My ODM

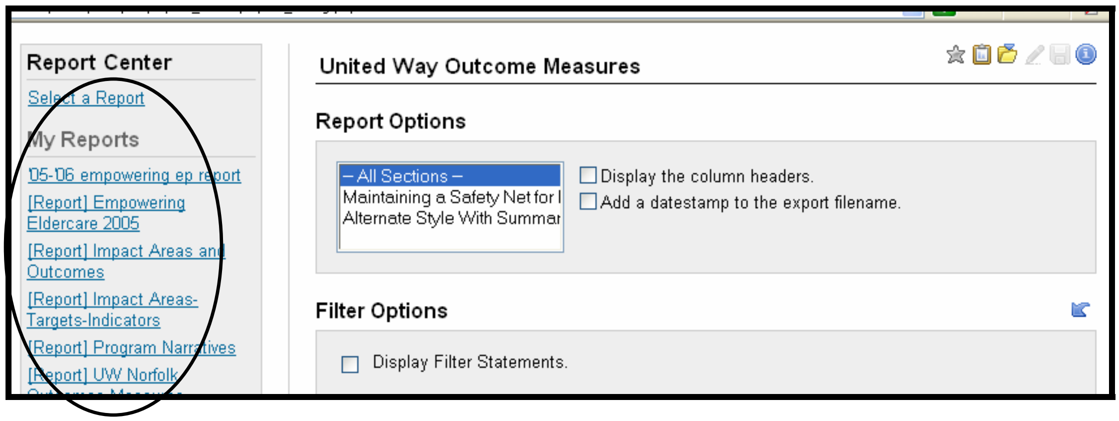
The first icon is the **Star** icon ( ), which is used to save a report to My ODM. In addition, when a report is saved to My ODM, it can be **renamed and saved** before or after filters have been set.



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.

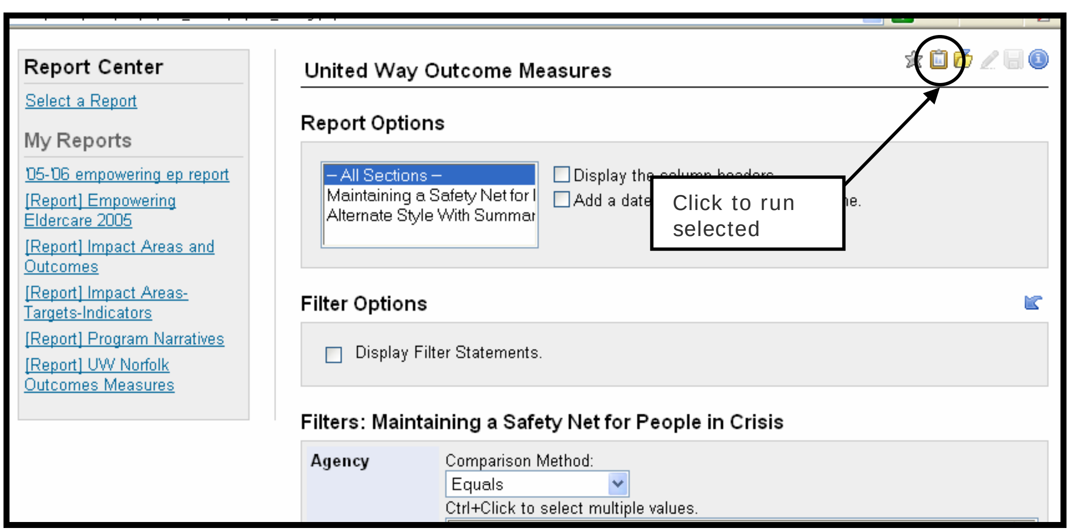
In addition, the user can access saved report in **Report Center** under **My Reports**.



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.)

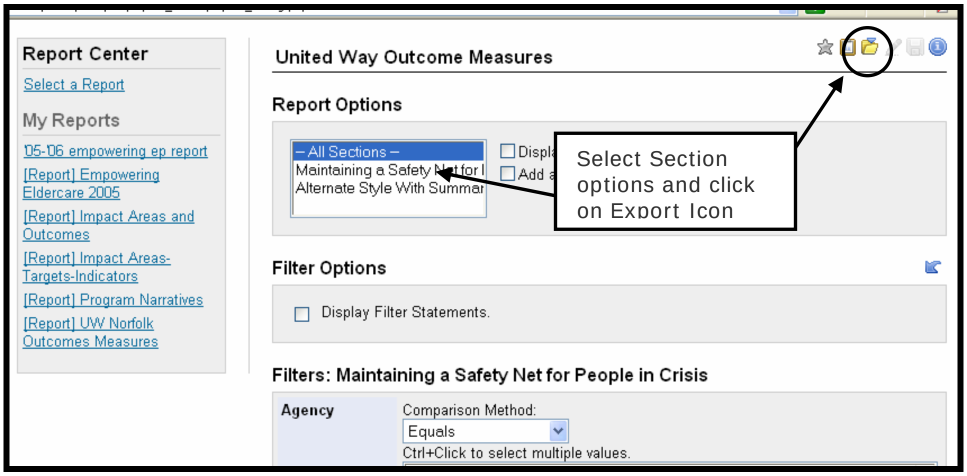
If a report is selected from My Reports it must be "edited" in order to change the filters. (See below for how to edit a report).



Exporting Report Data

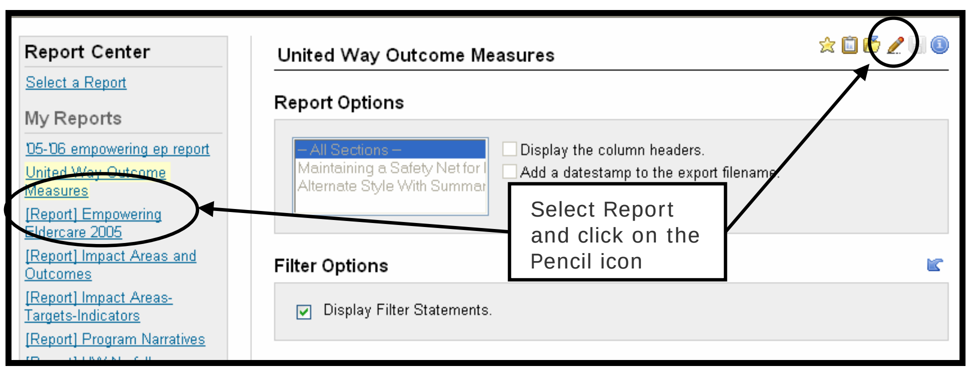
A user has the option to export an entire report to a .CSV file, or just to export one or more sections at a time. The Sections are selected from the first dropdown, and the top option is "**All Sections**".

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

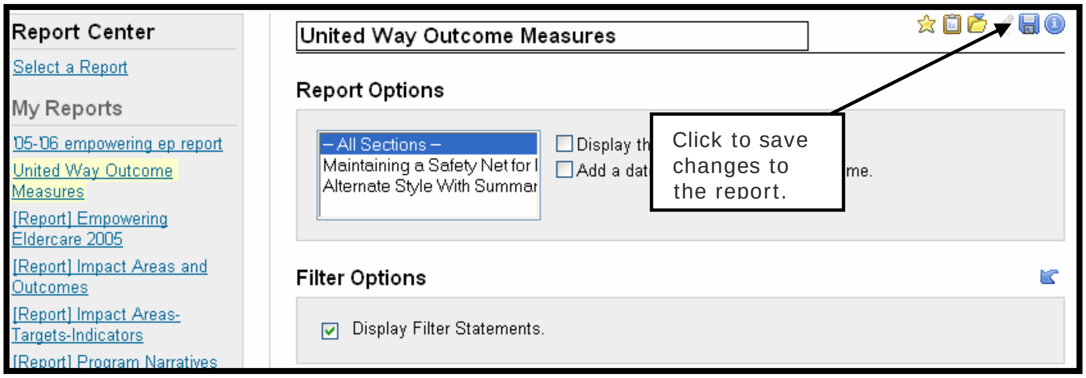


Editing a Saved Report

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.

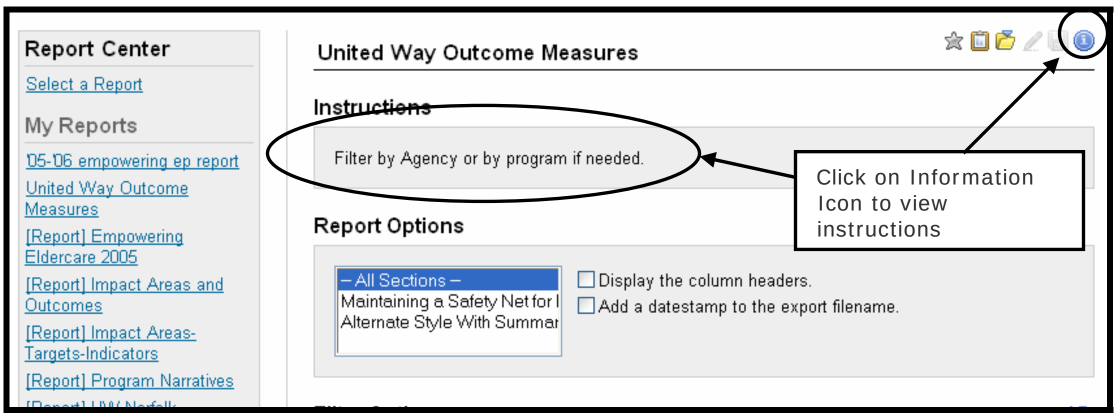


This will activate all of the options for the report. The report can now be edited. Click on the **Save icon**, located to the right of the Pencil icon, to save any changes or edits to that saved report.



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.



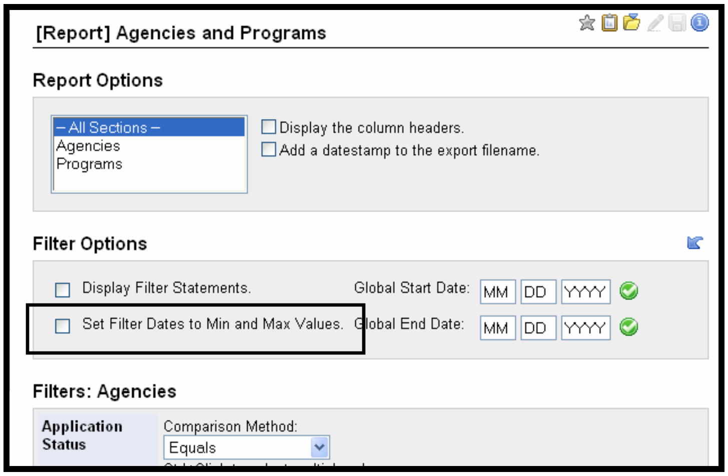
5.2 Report Filters

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

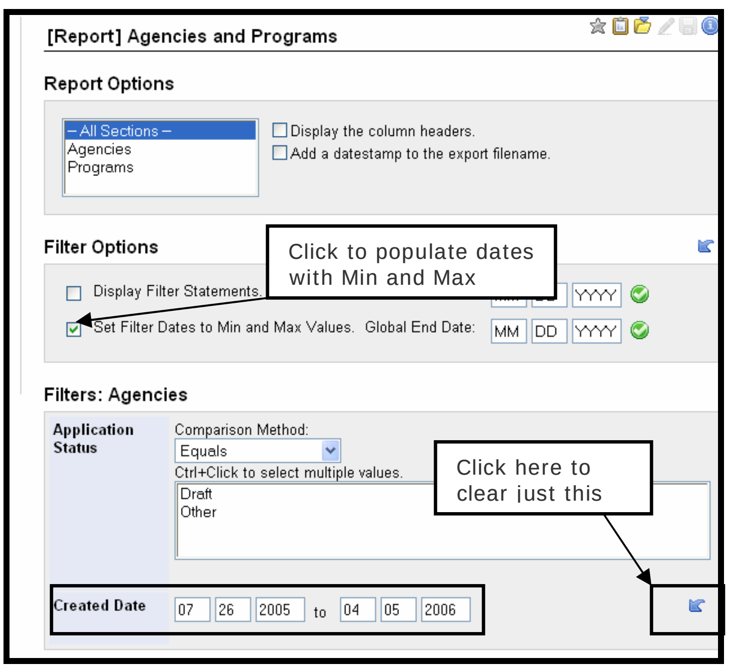
If no filters are available, it simply means that the report creator did not allow for filters to be set. It may also mean that certain filters are in place before the report is run.

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.

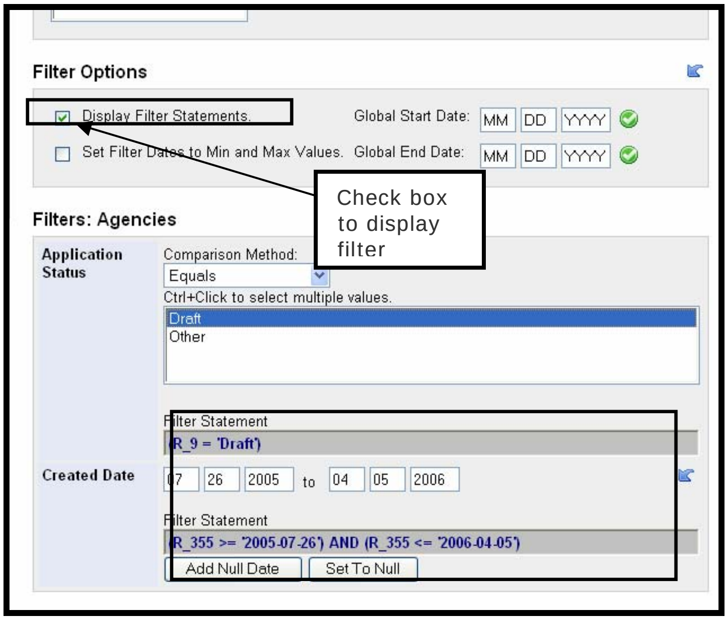


To view the minimum and maximum saved values for the filterable date fields, select the **Set Filter Dates to Min and Max Values** option. Once selected, minimum and maximum date ranges will appear in the filters. After dates have been entered, the values for a particular filter can be removed by clicking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

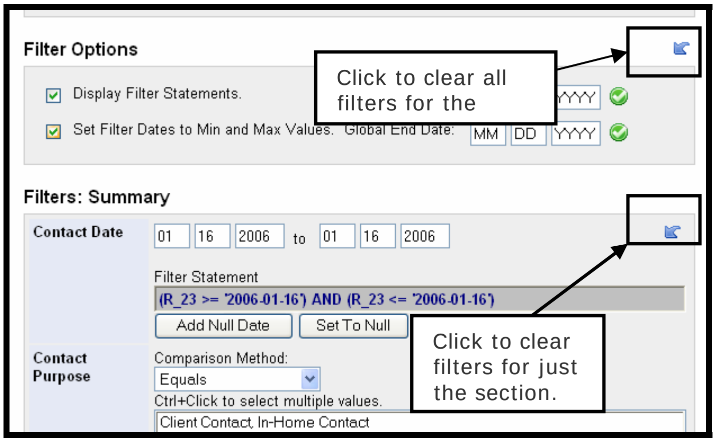


Filter Dates

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.

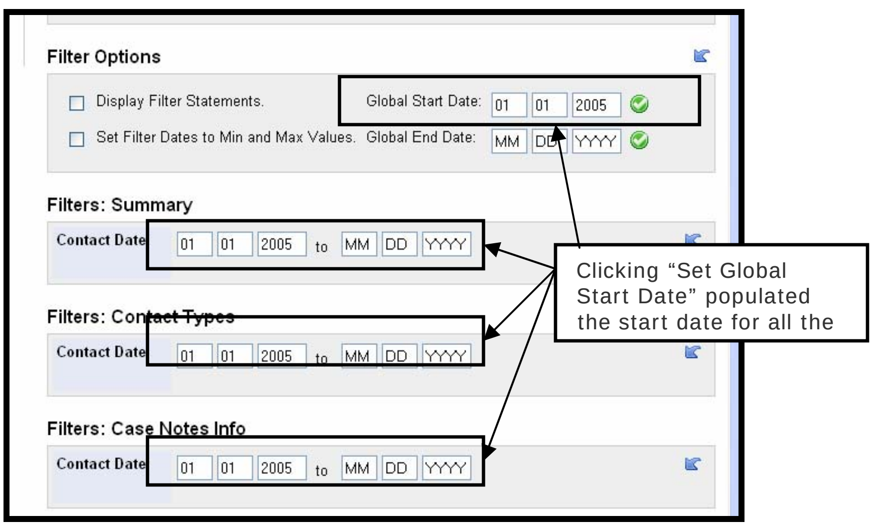
Clear Filters

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

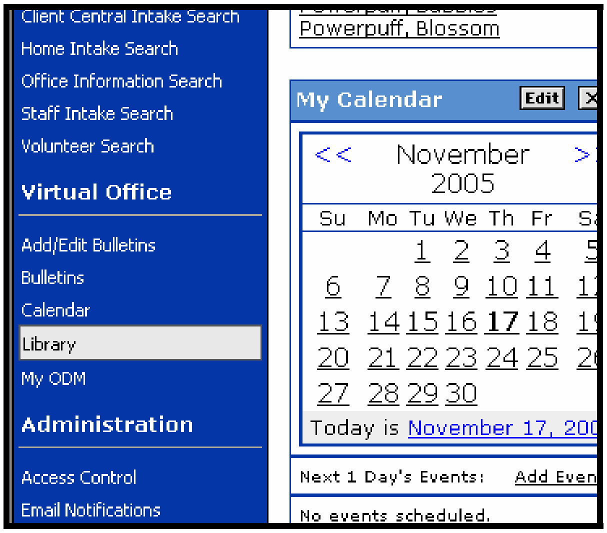
A single date can be used to populate all of the date filters for a report. To set a global date, enter the date into the **Set Global Start Date** or the **Set Global End Date** field and click the appropriate button to populate all of the start or end dates in every section of the report.



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

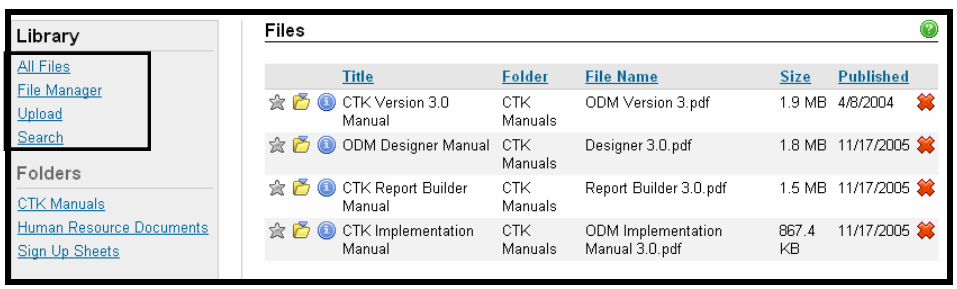
5.3 The Library

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

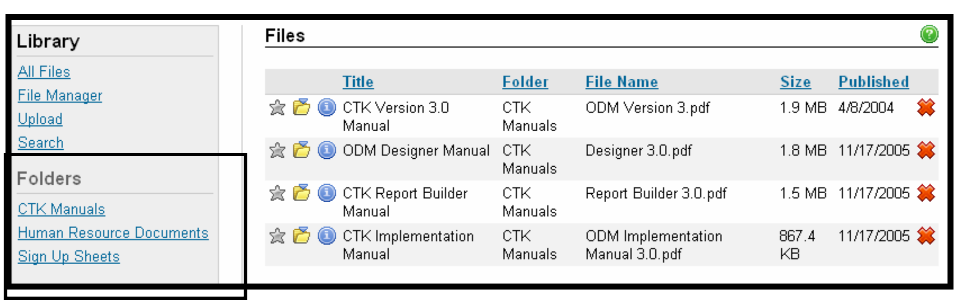


All Files

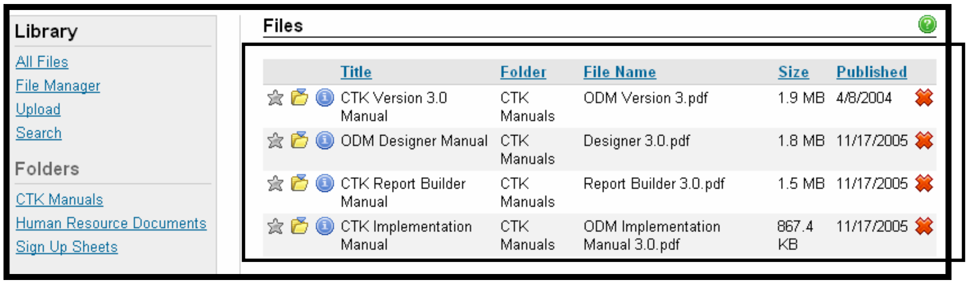
The user is first directed to the **All Files** screen in the **ODM Library**. On the left hand side of the screen is a box with links to all of the different screens available in the ODM Library.



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



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



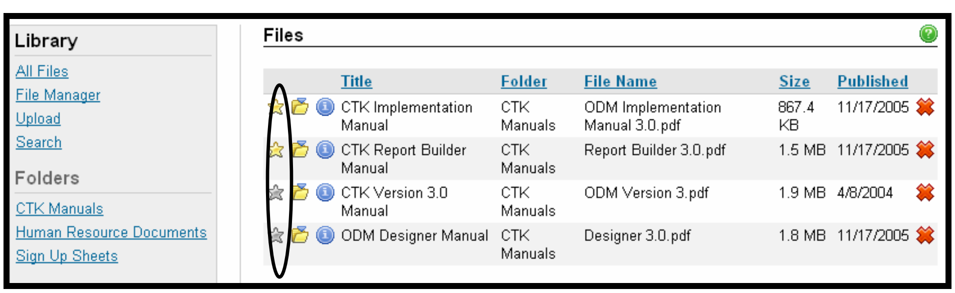
Files

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**.

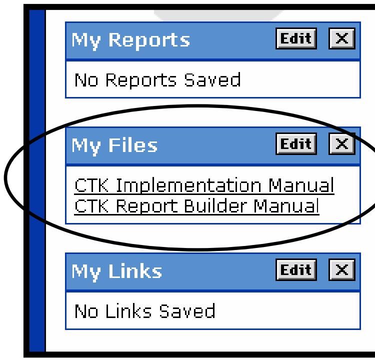
To the left of each document there are three icons; **Star, Folder and Info**. Each of these serves a different function. To the right of each document is a **Delete** icon, and at the top of the screen there is a **Help** icon. Place the cursor over an icon and a brief description of the icon functionality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

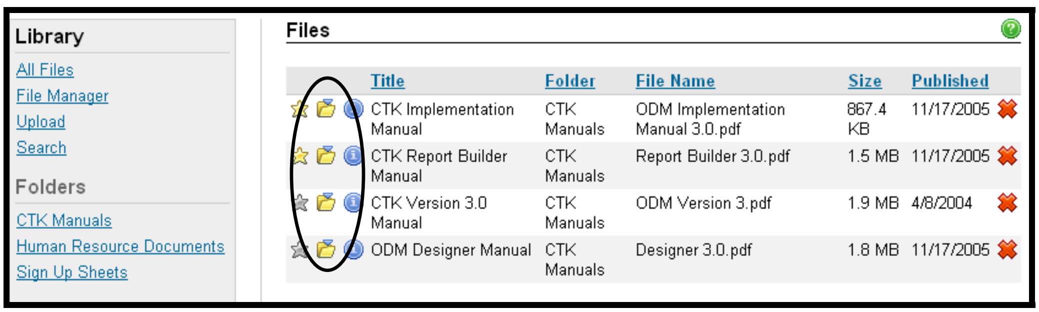


Once a file has been saved to **My Files**, it is displayed in **My ODM** under My Files.



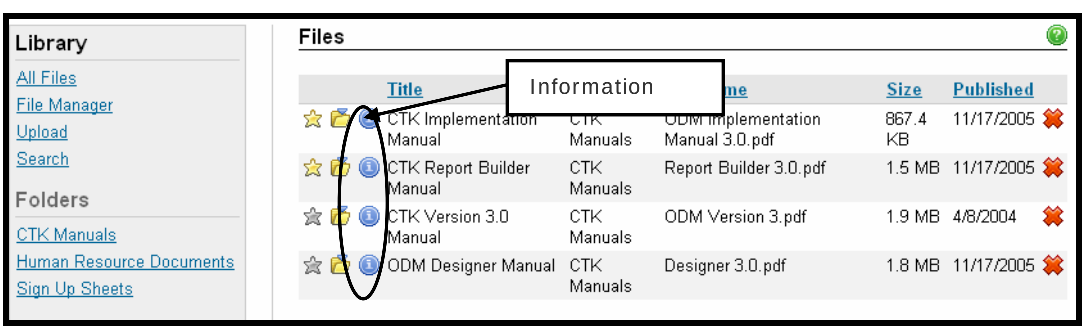
Folder

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.



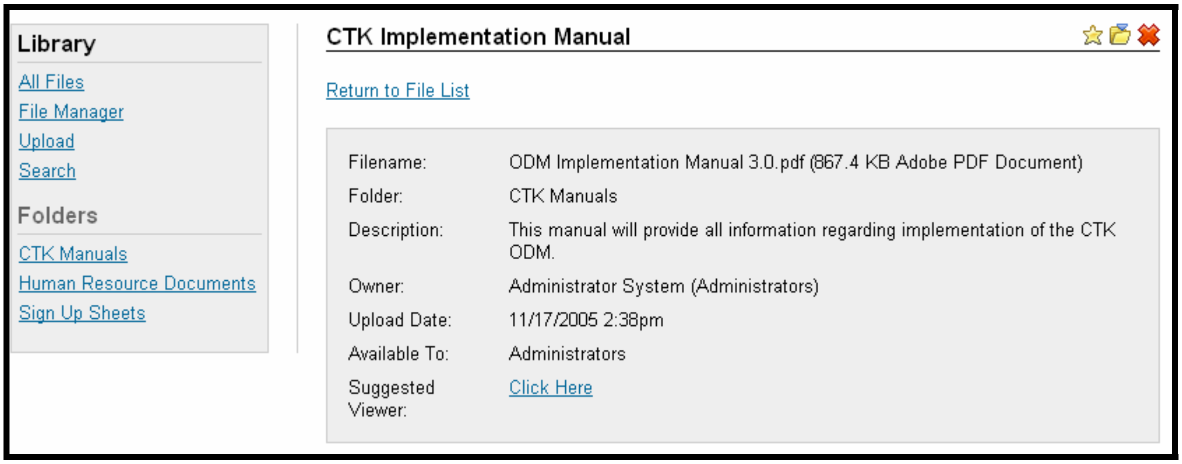
Information

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



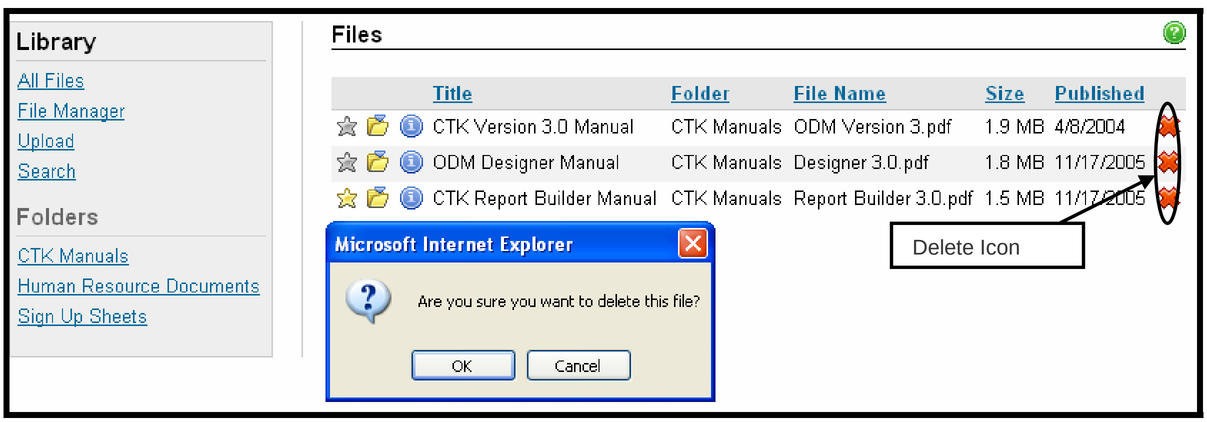
This Information icon will take the user to another screen that provides more in-depth information on that one document or file. From here the user can click on the **Star** icon to add this file to **My Files**, click on the Folder icon to download the file, or if available, click on the **Red X** icon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



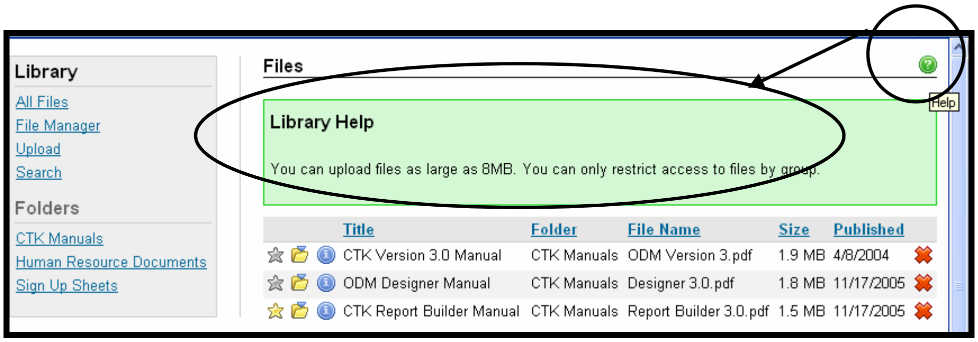
Delete

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**.



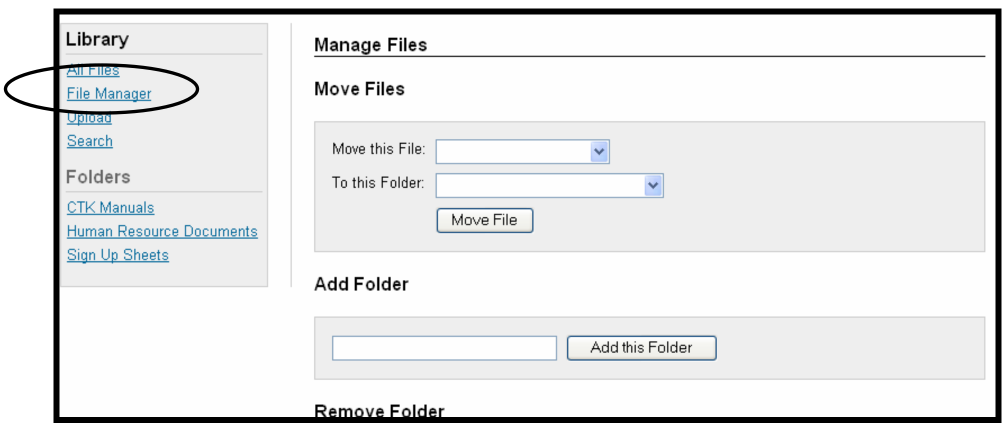
Help

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



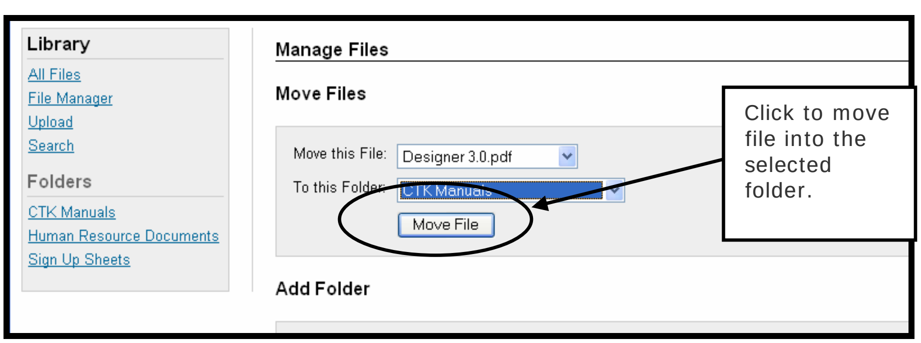
5.4 File Manager

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.



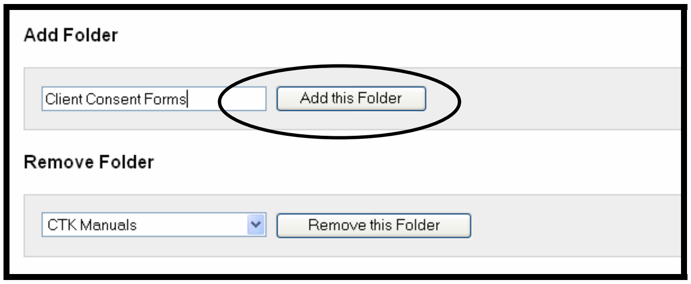
Move Files

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**.



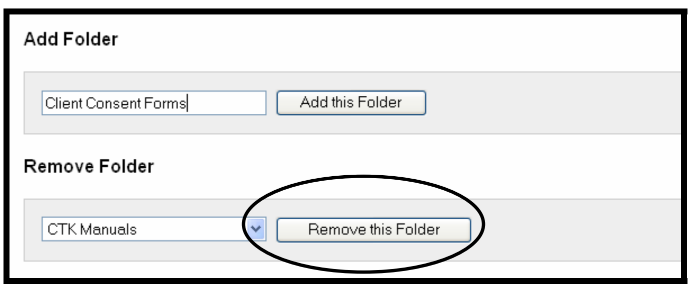
Add Folder

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



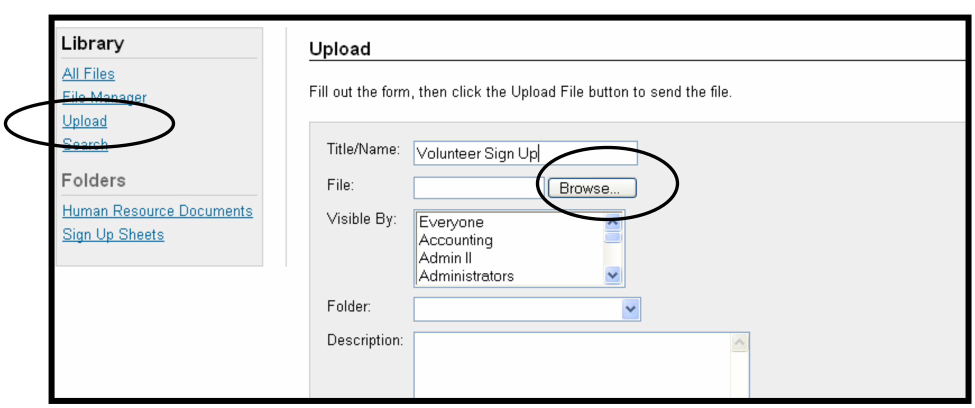
Remove Folder

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**.

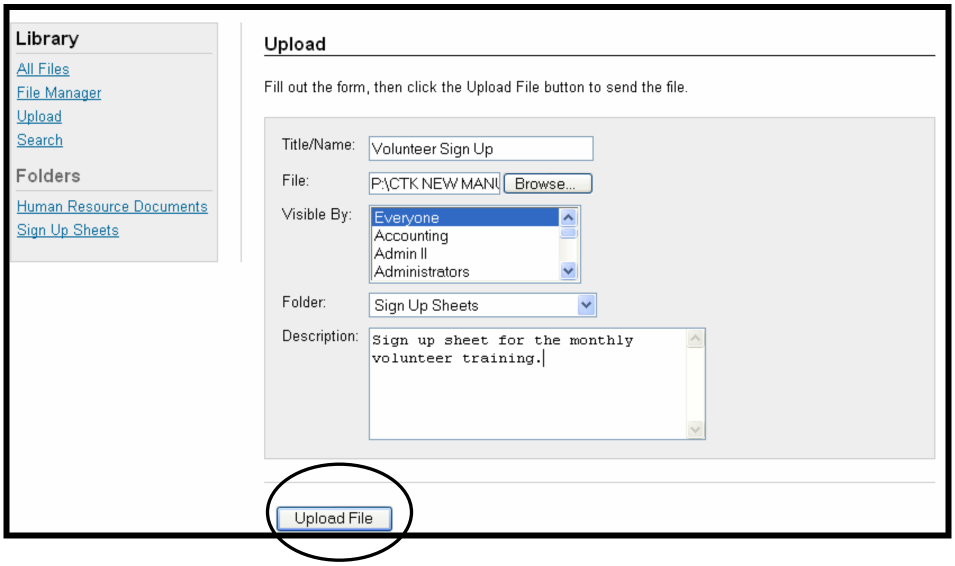


5.5 Upload

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**.



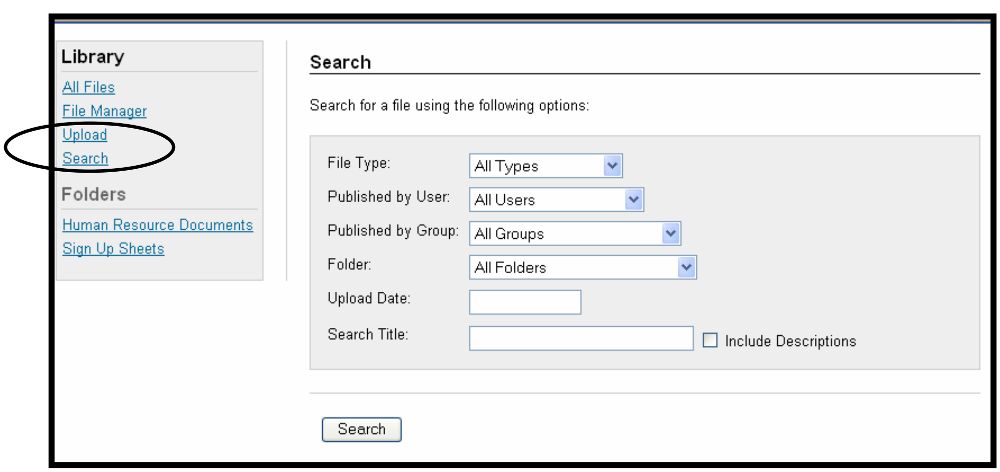
The **browse** button allows the user to locate the document on the user's computer. Select the document and then select the user group that needs to view the document. Next, select the appropriate folder. A description can be entered if desired. Finally, click on **Upload File** to upload the selected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



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

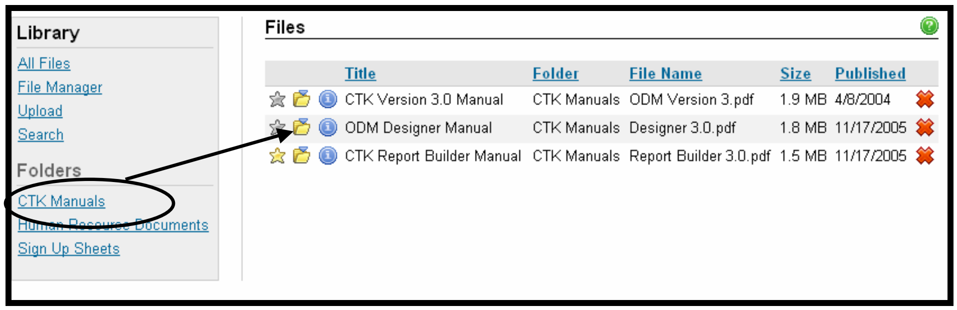
5.6 Search

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**.



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.



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 it's capabilities.

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