



Application User Guide

Teachers

Martin Atterbury

INTRODUCTION

The purpose of this document is to provide Teachers with an overview of functionality and provide detailed instructions to setup and operate the USIMAC Production Portal (UPP).

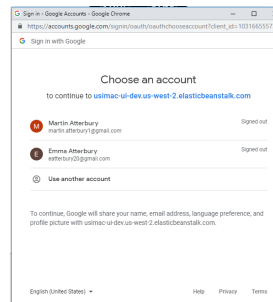
The USIMAC Production Portal is a cloud hosted web application, enabling teachers to make online requests for accessible material for students under their care. It is intended to streamline the process for requesting material, whether to be created or in-stock, as well as providing online status of orders and returns.

The application is available and accessible by navigating to the following URL:

<https://www.usimacprodportal.com>


AUTHENTICATION AND INITIAL SETUP

In order to login to UPP, teachers will require a valid account with Google and to have been added as a user to UPP by USIMAC. The first level of authentication is for the user to log into their google account.

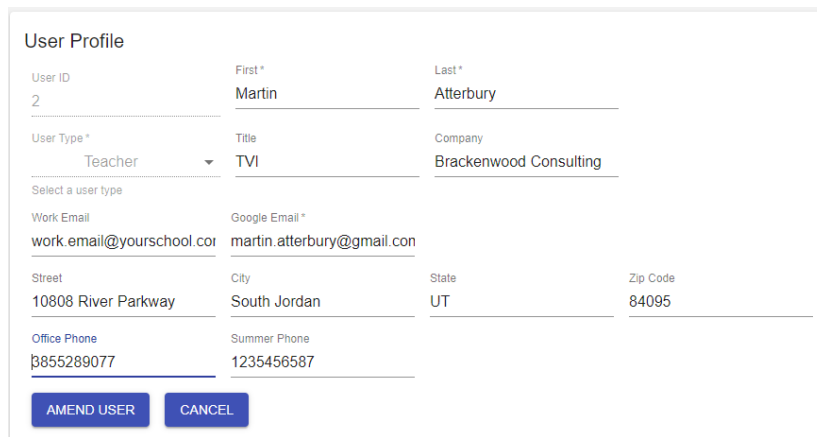


To obtain a UPP account, please contact USIMAC by sending an email that includes your first and last name, your Google email address, your school district or charter, to usimacorders@usdb.org.

Once the teacher has access to the application, an initial setup will need to be completed before orders can be submitted. This is achieved by navigating to the profile page and entering user details, school affiliation and information on the students who will be receiving USIMAC material.

The Profile Page can be accessed by selecting the user icon in the top right of the screen  - then selecting Profile from the drop-down menu.

Adding User Details:



The screenshot shows a 'User Profile' form with the following fields and values:

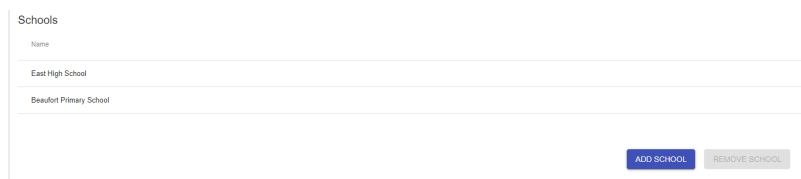
User ID	First *	Last *	
2	Martin	Atterbury	
User Type *	Title	Company	
Teacher	TVI	Brackenwood Consulting	
Select a user type			
Work Email	Google Email *		
work.email@yourschool.cor	martin.atterbury@gmail.com		
Street	City	State	Zip Code
10808 River Parkway	South Jordan	UT	84095
Office Phone	Summer Phone		
8855289077	1235456587		

Buttons: AMEND USER, CANCEL

This section of the profile page is used to capture general information and contact details for the user. This removes the need to enter on each order. Once all details have been entered the values can be saved by clicking the 'Amend user' button.

Selecting School Affiliation:

Each teacher must be affiliated with at least one school before an order can be placed and these affiliations are displayed on the profile screen.



The screenshot shows a 'Schools' section with a list of schools:

- East High School
- Beaufort Primary School

Buttons: ADD SCHOOL, REMOVE SCHOOL

By clicking the 'Add School' button, the teacher will be able to select from a pre-populated list of schools and add to their profile. This will streamline the ordering process by auto-filling static information related to the schools selected.

Name	Street	City	State
Academy for Math Engineering	000 Main St	Ogden	Utah
Academy for Math Engineering & Science	5715 S 1300 E	Salt Lake City	Utah
American Academy of Innovation	5410 W South Jordan Parkway	South Jordan	Utah
American International School of Utah	4998 S Galleria Drive	Murray	Utah
American Leadership Academy	898 W 1100 S	Spanish Fork	Utah
American Preparatory Academy	12892 S Pony Express Rd	Draper	Utah
American Preparatory Academy - Accelerated School	3636 W 3100 S	West Valley City	Utah
American Preparatory Academy - Draper #2	11938 South Lone Peak Parkway	Draper	Utah
American Preparatory Academy - Draper #3	431 W 11915 S	Draper	Utah

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CANCEL ADD

Adding Student Details:

Finally, the teacher must enter the details of the students in their care. This includes basic identification information, details on their disability and a CHAFEE eligibility confirmation.

Student

First _____ Last _____

Grade _____

Chafee Eligibility (Required Yearly)

By clicking understand and agree below, I hereby:

Understand the use of USIMAC services is limited to students with a documented print disability in their IEP/504 accommodation. Under IDEA 2004, students who are blind, visually impaired, have a physical limitation or a reading disability may be qualified to access and use specialized formats under provisions of the Chafee Amendment to the Copyright Act.

Eligibility is determined by the IEP/504 team. As a result, school districts should keep on file documentation of students' eligibility to use accessible educational materials produced by USIMAC. Proof of a student's disability needs to be certified by a qualified professional, as explained in the [USIMAC Chafee Eligibility Criteria](#).

I certify that I am a Competent Authority for this student and that he or she meets the requirements outlined in the [USIMAC Chafee Eligibility Criteria](#).

I understand and agree to the conditions outlined above

Disability Type * _____ Primary Reading Format * _____

Secondary Reading Format _____ Date of Birth * _____

mm/dd/yyyy

CANCEL SUBMIT

Once the profile details have been entered, noting these can be updated at any time, pressing the 'Cancel' button will return you to the landing page.

SUBMITTING AN ORDER

This section of the document describes the overall process of creating an order, assigning requested material and the full workflow from submission through to approval. It also covers exception flows such as amendments and order cancellations, describing the restrictions imposed by the system in certain scenarios.

The order is the means by which the demand a teacher has for material is captured and then sent to USIMAC for review. This online ordering system replaces the current manual PDF order form. Each order captures the material requirements for a single student, each order can have multiple items attached. It is expected that most orders will be created by a teacher, however functionality does exist for coordinators to also create orders where necessary. Specifically, a coordinator will be required to raise the order if material requires creation with non-default properties.

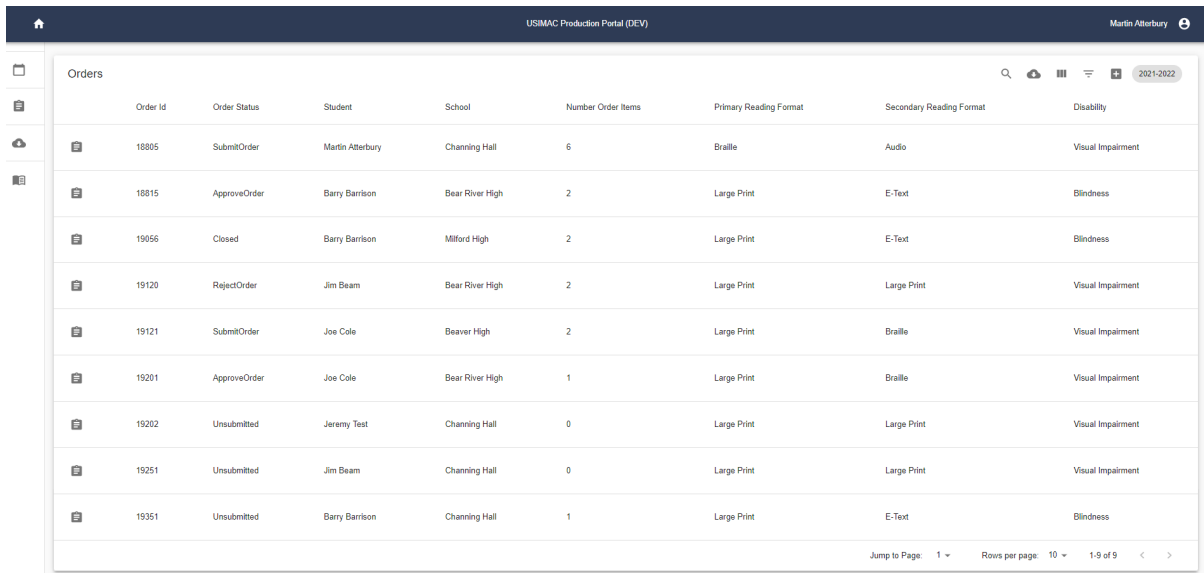
Once the order information has been entered and the order items added, the order can be submitted to USIMAC for review. At the point of submission, checks will be run to ensure that all mandatory data is entered and that order items selected are still available. USIMAC will then be responsible for reviewing the order to ensure all pre-requisites have been met and then determining whether to approve.

Teacher Landing Page

This page is the default landing page when logging in with a user type of teacher. From this page, the teacher will be able to:

- 1) Create an Order
- 2) View and amend existing orders
- 3) Check Order Status
- 4) Download Electronic Material
- 5) View details on books and individual volumes awaiting return to USIMAC

The landing page is laid out in various summary grids, each with the intention of presenting data simply and allowing that data to be filtered for ease of use. A sidebar is provided on the left-hand side of the page to allow easy navigation to these various summary grids. Within each of the summary grids, the data returned can be filtered, downloaded and searched.



Order Id	Order Status	Student	School	Number Order Items	Primary Reading Format	Secondary Reading Format	Disability
18805	SubmitOrder	Martin Aterbury	Channing Hall	6	Braille	Audio	Visual Impairment
18815	ApproveOrder	Barry Barrison	Bear River High	2	Large Print	E-Text	Blindness
19056	Closed	Barry Barrison	Milford High	2	Large Print	E-Text	Blindness
19120	RejectOrder	Jim Beam	Bear River High	2	Large Print	Large Print	Visual Impairment
19121	SubmitOrder	Joe Cole	Beaver High	2	Large Print	Braille	Visual Impairment
19201	ApproveOrder	Joe Cole	Bear River High	1	Large Print	Braille	Visual Impairment
19202	Unsubmitted	Jeremy Test	Channing Hall	0	Large Print	Large Print	Visual Impairment
19251	Unsubmitted	Jim Deam	Channing Hall	0	Large Print	Large Print	Visual Impairment
19351	Unsubmitted	Barry Barrison	Channing Hall	1	Large Print	E-Text	Blindness

School Year is provided as a global setting in the sidebar, and is accessed by selecting the calendar icon which will open the menu providing school year options for selection:

USIMAC Production Portal (DEV)									Martin Atterbury
School Year	Orders								
2019-2020	Order Id	Order Status	Student	School	Number Order Items	Primary Reading Format	Secondary Reading Format	Disability	2021-2022
2020-2021	18805	SubmitOrder	Martin Atterbury	Channing Hall	6	Braille	Audio	Visual Impairment	
2021-2022	18815	ApproveOrder	Barry Barrison	Bear River High	2	Large Print	E-Text	Blindness	
2022-2023	19056	Closed	Barry Barrison	Milford High	2	Large Print	E-Text	Blindness	
Orders	19120	RejectOrder	Jim Beam	Bear River High	2	Large Print	Large Print	Visual Impairment	
Electronic Downloads	19121	SubmitOrder	Joe Cole	Beaver High	2	Large Print	Braille	Visual Impairment	
Copies in Circulation	19201	ApproveOrder	Joe Cole	Bear River High	1	Large Print	Braille	Visual Impairment	
	19202	Unsubmitted	Jeremy Test	Channing Hall	0	Large Print	Large Print	Visual Impairment	
	19251	Unsubmitted	Jim Beam	Channing Hall	0	Large Print	Large Print	Visual Impairment	
	19351	Unsubmitted	Barry Barrison	Channing Hall	1	Large Print	E-Text	Blindness	


The school year selected here will apply to all the subsequent summary grids displayed.

Order Summary Grid:

USIMAC Production Portal (DEV)									Martin Atterbury
Orders	Order Id	Order Status	Student	School	Number Order Items	Primary Reading Format	Secondary Reading Format	Disability	2021-2022
	18805	SubmitOrder	Martin Atterbury	Channing Hall	6	Braille	Audio	Visual Impairment	
	18815	ApproveOrder	Barry Barrison	Bear River High	2	Large Print	E-Text	Blindness	
	19056	Closed	Barry Barrison	Milford High	2	Large Print	E-Text	Blindness	
	19120	RejectOrder	Jim Beam	Bear River High	2	Large Print	Large Print	Visual Impairment	
	19121	SubmitOrder	Joe Cole	Beaver High	2	Large Print	Braille	Visual Impairment	
	19201	ApproveOrder	Joe Cole	Bear River High	1	Large Print	Braille	Visual Impairment	
	19202	Unsubmitted	Jeremy Test	Channing Hall	0	Large Print	Large Print	Visual Impairment	
	19251	Unsubmitted	Jim Beam	Channing Hall	0	Large Print	Large Print	Visual Impairment	
	19351	Unsubmitted	Barry Barrison	Channing Hall	1	Large Print	E-Text	Blindness	

The order summary grid displays the orders which have been created by the user, this includes orders in any state from unsubmitted through to closed. Filters are provided to allow the teacher to narrow down the orders displayed by school year, student name or the status of the order.

Rows in the Order Summary grid reflect individual orders which can be selected by the selecting the view order icon on each order row within the table. Functionality provided by the Orders screen will be covered later in this document.

Selecting the 'New Order' button, embedded within the toolbar at the top of the table , will take the teacher to a new order screen, allowing details to be entered and a new order submitted. The school year selected is always displayed on the table to easily identify which year is being displayed.

Electronic Download Grid:

This table provides details of the material which is available for download.

Electronic Copies to Download									
Copy Id	Order Id	Order Item Id	Format	Title	ISBN13	ISBN10	Copyright	Student	Book Id
17051	19201	23151	PDF	Wisden Cricketers' Almanack 2019	9781472964052	1472964055		Joe Cole	4601

Jump to Page: 1 Rows per page: 10 1-1 of 1

The teacher can select the 'Downloads' button to navigate to the volume downloads page to begin their downloads.

Copy to Download

This material is protected by copyright law (Title 17 U.S. Code). The copyright for the material in this electronic format is the sole property of the original publisher.

This accessible electronic format is owned and maintained by USIMAC and is available for use by students with a documented print disability, on a single-use basis (one student per file).


USIMAC produces and procures accessible electronic format through other Accessible Media Producers, including American Printing House for the Blind (APH), Bookshare, and Learning Ally.

Any unauthorized use of the material, such as printing or copying of part or all of the contents, is prohibited other than the following:

1. You may download to a computer to use with a screen reader, a magnification device, or to emboss/transcribe into Braille.
2. You may import to an assistive technology device, such as a digital talking book player, a tablet, or a handheld refreshable Braille display.

Any further reproduction or distribution is an infringement. A violation could result in criminal or civil penalties. APH File Repository Privileges will be suspended if copyright holders' rights are violated.

Title Wisden Cricketers' Almanack 2019	Subtitle
Student Joe Cole	School Year 2021-2022

Electronic Delivery URLs			
Volume Id	Barcode	Comments	Download
24151	10042450		

Jump to Page: 1 Rows per page: 10 1-1 of 1

Copies in Circulation:

The final section on the Teacher Landing page, display the material that has been shipped by USIMAC and should be in the possession of the teacher. This is split into two sections, distinguishing between material which may be kept and those which must be returned.

The screenshot shows the USIMAC Production Portal (DEV) interface. On the left is a navigation menu with options: School Year, Orders, Electronic Downloads, Copies in Circulation (expanded to show Copies to Return and Consumable Copies), and Consumable Copies. The main content area displays a table titled 'All Copies In Circulation' for the school year 2021-2022. The table has columns for Order Item Id, Order Id, Copy Id, Production Cost, Book Id, Title, Format, Media, School, Student, and School Year. Two rows of data are visible:

Order Item Id	Order Id	Copy Id	Production Cost	Book Id	Title	Format	Media	School	Student	School Year
22963	19056	16908	\$0.00	6751	Cocomelon ABC's	UEB	Hard Copy	Milford High	Barry Barrison	2021-2022
23151	19201	17051	\$0.00	4601	Wisden Cricketers' Almanack 2019	PDF	Electronic	Bear River High	Joe Cole	2021-2022

At the bottom of the table, there are controls for 'Jump to Page: 1', 'Rows per page: 10', and '1-2 of 2'.

From this table, clicking on the 'Volumes' button will allow the teacher to review the status of all the volumes associated with the material.

The screenshot shows two sections. The top section is titled 'Copy to be Returned' and contains the following details:

Title	Harry Potter and the Chamber of Secrets	Subtitle	Reading-Language Arts Program
Student	Joe Cole	School Year	2022-2023

The bottom section is titled 'Volumes' and contains a table with columns for Volume Id, Status, Status Date, Barcode, Comments, and Consumable. One row of data is visible:

Volume Id	Status	Status Date	Barcode	Comments	Consumable
24863	InCirculation	8/10/2021	10043470		N

At the bottom of the table, there are controls for 'Jump to Page: 1', 'Rows per page: 10', and '1-1 of 1'.

Once USIMAC have processed the returned volumes, the volume status will be updated to reflect that is no longer 'In Circulation'. Once all volumes have been returned the copy will be removed from the teachers landing page.

Order Page

The order page is broken into two logical sections Order Details and Order Items, the first captures general order information such as student, contact and school details. The second section at the bottom of the order page captures the material added to the order.

Much of the Order Details information required is automatically populated with allowable values in the dropdowns based on the profile information held in the system. This is taken from numerous static sources either maintained by the user or USIMAC. It is designed to streamline and simplify the order process by minimizing the number of fields to complete and potential for mistyping order critical information. It is also possible to overwrite contact information if required for a specific order.

Student Information

Student* Martin Atterbury †	EDIT STUDENT	Date of Birth* 05/01/2018	Student Grade 2	Chafee Plan* 504
	ADD STUDENT	Enter student's date of birth		

† This student's Chafee Plan has expired. Please Click 'Edit Student' above to set this student's Chafee Plan.

Disability Type* Visual Impairment	Primary Reading Format* Braille	Secondary Reading Format Audio
	Select a reading format	Select a reading format

Contact Information

Name* Martin Atterbury	Title* Admin	Email* martin.atterbury@brackenwo
Street* 10808 South River Front Park	City* South Jordan	State* UT
	Zip Code* 84095	
Office Phone* (385) 528 9868	Summer Phone* (222) 222 ____	
Alternate Name	Alternate Phone	Alternate Email

School

School* Channing Hall	Street 13515 S 150 E	City, State Zip Draper, Utah 84020
District *Charter School	<input checked="" type="checkbox"/> MOU Received	
Special Ed Dept Name	Special Ed Dept Phone	Special Ed Dept Email

Order Information

Order ID 18805	School Year* 2021-2022	Ship To* School Address
		Select a location to ship to
Required By mm/dd/yyyy	Number of Order Items 6	
Order Status SubmitOrder	Order Status Date 6/28/2021	Order Status Set By Martin Atterbury


Comments







MAKE NEW ORDER
AMEND ORDER
SUBMIT ORDER
CANCEL ORDER
RETURN HOME

Once the order details have been captured the teacher must now click the 'Make New Order' button to save the order details.

Functionality has been provided to allow student information to be maintained and added directly from the Order Page rather than having to navigate to the Profile page. From here the teacher can manage their existing student's information or add new students as required. Chafee eligibility is included within the form and eligibility attested to electronically. It should also be noted that the eligibility attested to for each student will expire at the end of each school year, indicated by text on the order page. Whilst

Order Item Table

It is now time to add material to the order, these are referred to as the order items and once added are visible on the order page itself. Order items are displayed on the Order Items table at the bottom of the order page. From this table new material can be added to the order, status of existing order items is displayed as well as options to renew or cancel items from the order. Order items must be added to an order before it can be submitted which can be achieved by clicking the 'Add Book to Order' button  on the table toolbar.

Order Items													
Order Item Id	Order Item State	Book Id	Copy Id	Title	Author	ISBN13	H/C Returned	Grade	Format	Media Type	Properties	Pacing Guide Sent	Hard Copy Sent
 	24161		7101	17908	Magic Tree House	Armando Venegas	0	6-8	UEB		Double Side/Single Space	Yes	Yes
 	23030	ApproveOrderItem	6751	16966	Cocomelon ABC's	Cocomelon	2424242424242	1	UEB			Yes	Yes
 	23029	InCirculation	1635	16815	Reach for Reading. Practice Book	N/A	9781305499034	3	UEB		Double Side/Single Space	N/A	N/A

Jump to Page: 1 ▾ Rows per page: 10 ▾ 1-3 of 3 < >

After clicking on 'Add Book to Order' the user will be directed to the Inventory Search page. Allowing the teacher to search using several different criteria to identify the material required.

The most efficient and accurate way of searching for material is by ISBN.

Inventory Search

Please note: Searching by ISBN is the quickest and most accurate way to find inventory, however please click the 'Search By Title' Button below if you do not know the ISBN of the material you require.

ISBN
 Enter Book ISBN

Book Count
 0

However, options exist to search by Title if needed with options to enter partial title names to bring back a wider set of results to pick from. Book records matching the search criteria will be returned for the teacher to view and select, alongside the book record are details of the quantity available.

Inventory Search

Please note: If you are unable to find the material you require from inventory, then please click the 'Make Book' button below to request.

Title
 Wellness Book Format Grade Series

Book Count
 2

Books

Book Id	Title	Subtitle	Author	Format	Level	ISBN13	ISBN10	Grade	Total Quantity	Quantity Available
709	Health and Wellness		Linda Meeks, Philip Heit	Large Print		9780078760266	0078760267	9-12	2	2
725	Health and Wellness		Linda Meeks & Philip Heit	Large Print		9780022806156	0022806156	7	1	1

Jump to Page: 1 Rows per page: 10 1-2 of 2

Total Quantity: This represents the total number of copies that USIMAC have produced or bought.

Quantity Available: This represents the total number of copies minus copies which are already checked out on open orders. Therefore, this represents the number of copies available to a teacher.

If no book records match the teacher search criteria, then the teacher should press the 'Make New Book' button to navigate to the page allowing them to request new material creation matching their requirements

In Inventory

Assuming an existing book records exists matching the teacher’s requirements, they will select the row in the search table and then click on the ‘Select Book’ button to navigate to the Book Inventory page to select the order item.

The Book Inventory page is split into 3 sections:

The screenshot shows the 'Book Page' interface. At the top, there are fields for ISBN, ISBN-10, ISBN-13, and Book ID, along with an 'ISBN LOOKUP' button. Below this is the book title 'American Anthem, Grades 9-12 Modern American History' and the author 'Holt, Rinehart & Winston'. The grade is set to '9-12' and the book format is 'USB'. A 'RETURN TO ORDER PAGE' button is visible.

The middle section, 'Book Copies In Inventory', contains a table with the following data:

Copy ID	Properties	Number Copies
7	Report	0
3101	Double Side/Single Space	0
3102	Double Side/Single Space	0
3103	Double Side/Single Space	0

Below the table is an 'ADD BOOK/COPY TO ORDER' button.

The bottom section, 'Book Copy Properties for New Material*', includes checkboxes for 'Single Space', 'Double Space', 'Single Side', and 'Double Side'. Under 'Book Build Materials', there are checkboxes for 'Hard Copy Sent to USIMAC' and 'Pacing Guide Sent to USIMAC', and a 'Media Type' dropdown menu. An 'ADD BOOK/COPY TO ORDER' button is at the bottom.

The top section displays the details of the book record selected; it is not possible to edit these fields. The middle section allows the teacher to view the specific copies available for that book, this displays the properties allowing specific student requirements to be met. It will not display copies which are associated with another submitted order. Selecting the row and then clicking on the ‘Add Book to Order’ button will add the selected copy as an order item to the order being created. Please note, that for digital material no copies are stored within the system and therefore no copies will be shown. Each request for digital material will need to come through as a new material request with the appropriate media type selected.

The third section allows a teacher to request material creation and should only be used if the copies listed above do not meet their requirements or no copies are listed. The system will automatically select the default properties for a given grade and format, details of these mappings are included in the appendix. If the teacher requires a non-default combination of properties, they should contact USIMAC to discuss their requirement. USIMAC have elevated permissions to add non-default Order Items onto an order. For any new material creation, the teacher must submit an original hardcopy and pacing guide to assist the production of the new material. Checkboxes are provided for the teacher to confirm that these actions have been taken at the point of submitting the order. These are checked by USIMAC coordinators prior to order approval.

Additionally, for digital formats, the teacher must specify how they wish to receive the material and a drop down is provided to make their selection. For digital formats this is a mandatory field and must be completed before an order item can be added.

Make New Book

If the teacher is unable to find an existing book record, indicated by no results returned from the inventory search page, they should click on the 'Make New Book' button. This will direct the user to a blank inventory book page. Add Book/Copy to Order







The screenshot shows a web form titled "Book Page" with the following sections:

- ISBN Lookup:** A blue "ISBN LOOK-UP" button and a search box for ISBN-10 or ISBN-13.
- Form Fields:** Input fields for ISBN-10, Title, Subtitle, Author, Publisher, Copyright, Grade (with a dropdown menu), and Book Format (with a dropdown menu).
- Buttons:** A blue "RETURN TO ORDER PAGE" button.
- Book Copies In Inventory:** A section with a grey "ADD BOOK/COPY TO ORDER" button.
- Book Copy Properties for New Material:** Checkboxes for "Single Space", "Double Space", "Single Side", and "Double Side".
- Book Build Materials:** Checkboxes for "Hard Copy Sent to USIMAC" and "Pacing Guide Sent to USIMAC", and a "Media Type" dropdown menu.
- Final Button:** A blue "ADD BOOK/COPY TO ORDER" button.

Here they will be able to enter the book details either manually or using the ISBN lookup functionality. Default properties will be assigned based on grade and format and grade, enter their pre-requisite information and then add to order by clicking the 'Add Book/Copy to Order' button.


Submitting an Order

Once the user has added all the order items to their order, they are able to navigate back to the order page, using the 'Return to Order Page' button. It is from the Order page that the user will review their order, their order items and then submit the order to USIMAC if satisfied.

Order Items													Search	Cloud	Print	Filter	Plus
Order Item Id	Order Item State	Book Id	Copy Id	Title	Author	ISBN13	H/C Returned	Grade	Format	Media Type	Properties	Pacing Guide Sent	Hard Copy Sent				
 	24161	7101	17908	Magic Tree House	Armando Veredas	0		6-8	UEB		Double Side/Single Space	Yes	Yes				
 	23030	ApproveOrderItem	6751	16966	Cocomelon ABC's	Cocomelon	2424242424242	1	UEB			Yes	Yes				
 	23029	InCirculation	1635	16815	Reach for Reading, Practice Book	N/A	9781305499034	3	UEB		Double Side/Single Space	N/A	N/A				

Jump to Page: 1 ▾ Rows per page: 10 ▾ 1-3 of 3 < >

Order Item Prerequisite Page

Once the order items have been added to the order, further options are available on the Prerequisite page, accessed by clicking the  button on the order item summary grid. This will take the user to the prerequisite page, from here you can:

- 1) Attach a pdf Pacing Guide to aid production timelines
- 2) Download and print a Hard Copy Tag to be attached to Hard Copies sent for transcription
- 3) Manually update the status of prerequisites.

Upload Pacing Guide PDF File

No file chosen

Hard Copy Tag

Comments _____

Book/Copy Prerequisites

Hard Copy Sent to USIMAC Hard Copy Received by USIMAC

Pacing Guide Sent to USIMAC Pacing Guide Received by USIMAC

Returning to the Order page and reviewing the Order Item summary grid, we can see that pre-requisite information is displayed to the user, status description below:

N/A – This is material is complete and from inventory, pacing guide and Hard Copy are not required.

Yes – Pacing Guide and Hard Copy Received are required and have been marked as sent by the teacher.

No – Pacing Guide and Hard Copy Received are required but have been marked as outstanding/incomplete by the teacher.

These pre-requisites will be reviewed by USIMAC coordinators prior to approving the order.

On pressing the 'Submit Order' button a check will be run to ensure that no order items attached to the order bring submitted have been submitted on another order. This is likely to be a rare occurrence, given that copies will not return in searches if they are currently checked out. However, if two orders were being worked on simultaneously it is possible that a copy could be attached to both orders and this check prevents a copy being submitted by more than one order at a time.

Assuming the unique copy check is passed, the order will then be submitted and generate an email confirmation of the order. The order will then mark each of the order items as 'checked out' ensuring they cannot be double-booked.

Order Amendments

Details of the actions available to during the various stages of the order workflow are listed below.

	Unsubmitted	Submitted	Approved	Rejected
Teacher				
Update Contact Details	Y	Y	Y	N
Add/Remove Order Items	Y	Y	N	N
Update Prerequisites	Y	Y	N	N
Request Order Cancellation	N	Y	Y	N
Request Order Item Cancellation	N	N	Y	N

Prior to order approval, the teacher can add or remove order items to their order. Once the order is approved, they may only submit cancellation requests to remove order items and additional material must be raised under a new order or speak directly to USIMAC.

A USIMAC coordinator can add or remove material at any point after the order has been submitted. It is through this process that a coordinator can substitute an alternate copy on to the order if so required. An email notification to the teacher will capture the amendment to their submitted order.


Cancellation Requests



Once an order has been submitted the teacher is able to request a cancellation from the order page. This will generate a request to the coordinator, visible through the 'Cancel Order Requests' filter on the USIMAC landing page. Navigating to the order page will allow the coordinator to 'Cancel Order' – this will generate email notifications of the cancellation as well as return the order items to inventory so they can be chosen by other teachers.

In addition to whole -order cancellations, a teacher can choose to cancel a single order item. This request is handled like the whole-order cancellation. Email notifications will be generated, and the order item being cancelled will return to inventory.

For non-inventory order items, the copy record will not be deleted but will no longer be associated to the order, the coordinator will need to decide whether to continue with production or to delete the shell copy record.

Renewal Request

A teacher may request the renewal of material in their possession, this option is visible once the order item state is InCirculation. The request is made through the order item table on the specific order item row that is required to be renewed. Clicking the renew button  will send a request to USIMAC to review and approve the renewal request.

		23029	InCirculation	1635	16815	Reach for Reading, Practice Book	N/A	9781305499034	3	UEB	Double Side/Single Space	N/A	N/A
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APPENDIX – UPP DATA HIERARCHY

The application uses a strict data hierarchy to manage relationships between the material in inventory and being created. This data hierarchy allows for an efficient re-use of common data whilst preserving data integrity across the system. See below for a description of the components of the data hierarchy:

Book

This is the highest level of the hierarchy and contains data attributes that are shared by all associated copies. This includes fields such as book title, ISBN, author and copyright.

A book record is unique for a given ISBN and format, allowing quantity to be managed and presented to the teacher efficiently.

There is a one to many relationship between book records and copies, multiple copies of material with identical ISBN and format details will be linked to the book record.

Copy

The copy is a system constructed record to house all the underlying volumes, acting as a parent record for the associated volumes. It will be linked to a single book record but potentially have many volumes associated to it. A copy record can never be associated with more than one book record. Copy records can have differing properties. Copy records are used in production of material to aggregate effort and costs, volume records are added as they are created.

No copy record is created for electronic material which also means no volumes will exist, electronic material will only have a book record. This reflects that electronic media is created for a one time purpose and will not be reused.

Volume

This is the lowest level of the hierarchy and links the system records to the physical material via a unique barcode. Multiple volume records can be added against a single copy, but a single volume can never be added to more than one copy record.

Order

Orders are created per student for a given school year and capture their material requirements, many order items can be requested against a single order. The order is also where contact and preferred shipping details are captured and shared with USIMAC.

Order Item

An order item is a requested copy, or electronic material, assigned to an order. Order items are unique to a given order and there is a one to many relationship between an order and order items. Prerequisites are tracked against an order item to ensure all the necessary inputs are available to create new material.