Application User Guide

UPP Teachers Guide

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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.
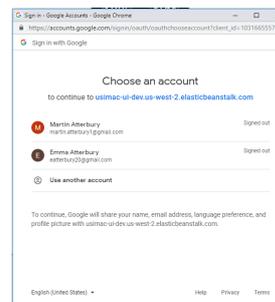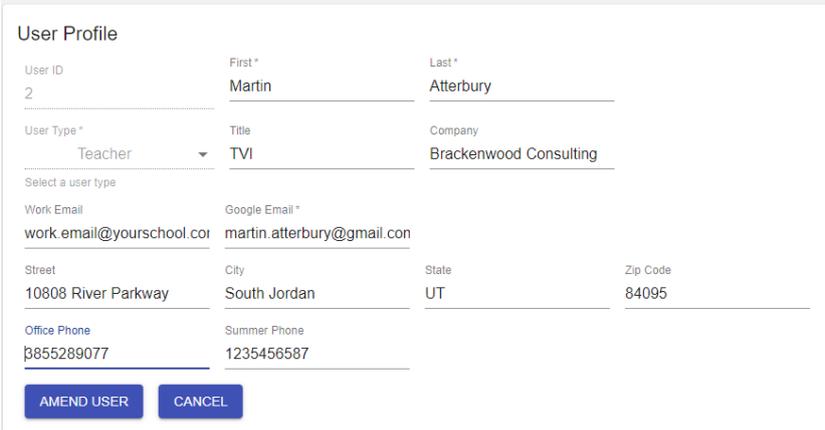

To obtain a UPP account, please contact USIMAC by sending an email that includes your first and last name, your Google email address, your school district or charter, to usimacorders@usdb.org.

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:

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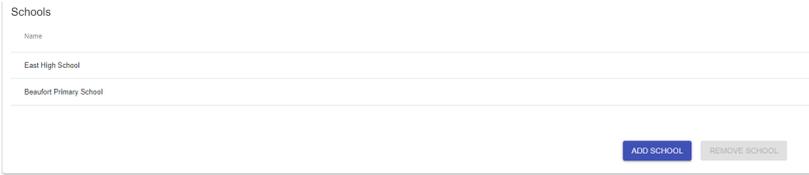
By clicking the 'Add School' button, the teacher will be able to select from a pre-populated list of schools and add to their profile. This will streamline the ordering process by auto-filling static information related to the schools selected.

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.

Order Summary Grid:

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, pressing the 'Amend Order' button will take the teacher to the Order screen for the selected row. Functionality provided by the Orders screen will be covered later in this document.

Selecting the 'New Order' button will take the teacher to a new order screen, allowing details to be entered and a new order submitted.

Electronic Download Grid:

Some of the material provided by USIMAC will be available to download electronically. Where this is possible it will be displayed and accessible through the Electronic download grid on the teachers landing page.

Material awaiting Return:

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 serves as a useful tracker of material which needs to be returned. Filters have been provided to easily view outstanding material by year and student.

Selecting a row in the Copies to be returned grid will then display the status of the associated volumes to allow the tracking of shipping and returns to USIMAC. 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.

Once the order details have been captured the teacher must now click the 'Make New Order' button to save the order details. 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 must be added to an order before it can be submitted.

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.

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.

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

<u>In Inventory</u>

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 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.

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.

Taking another look at 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.

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 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—the order item is cancelled and the book will be returned 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.

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.