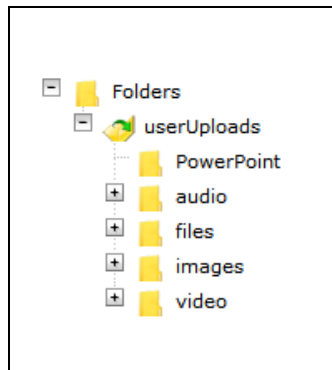


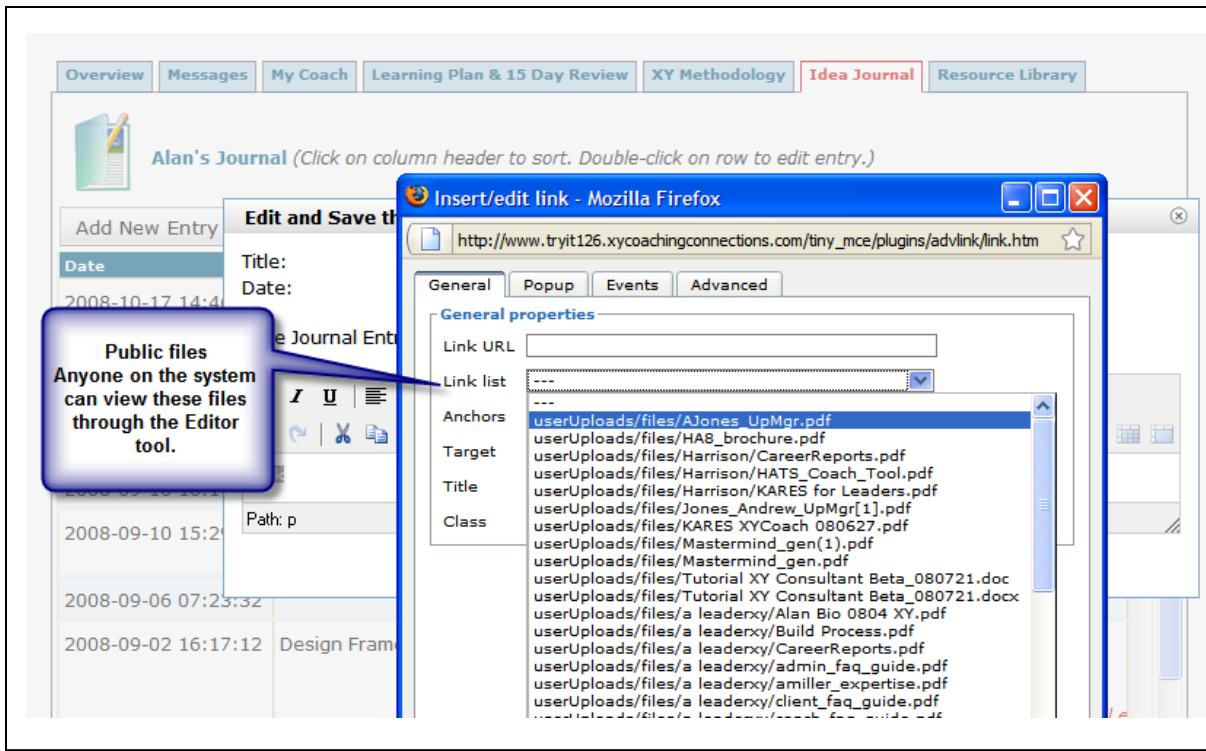
FAQ Guide for Admin User

Admin Access – Application Manager

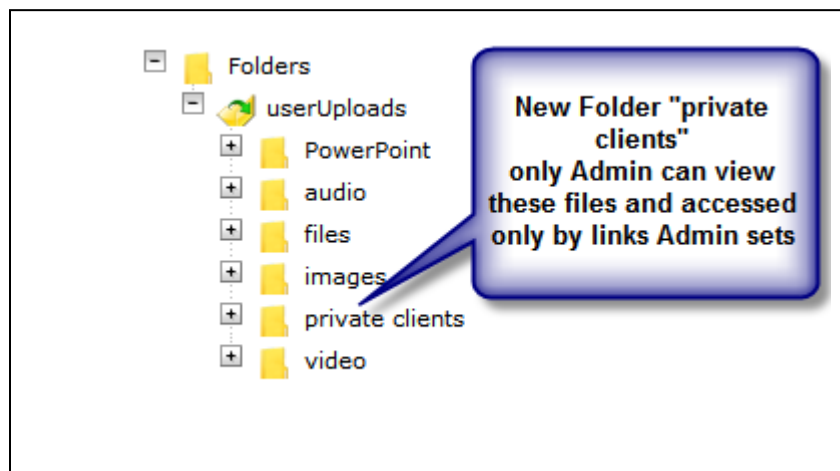
- **Backup Databases:** recommended to backup when you have made several changes. Has not been an issue. Just prudent practice. Recommended that you do this both before and after making significant changes. We can only restore from the most recent backup, in case of a problem.
- **Manage Resources:** This adds Resources into the XY Framework quadrants and intersection points.
- **Manage Uploads:** Recommended that you upload documents into the “files” or “images” folder. This lets you use the Link feature in the Editor to set up quick links to documents.
 - Do not rename the folder names in the Manage Uploads feature (see below), or this feature will not work.



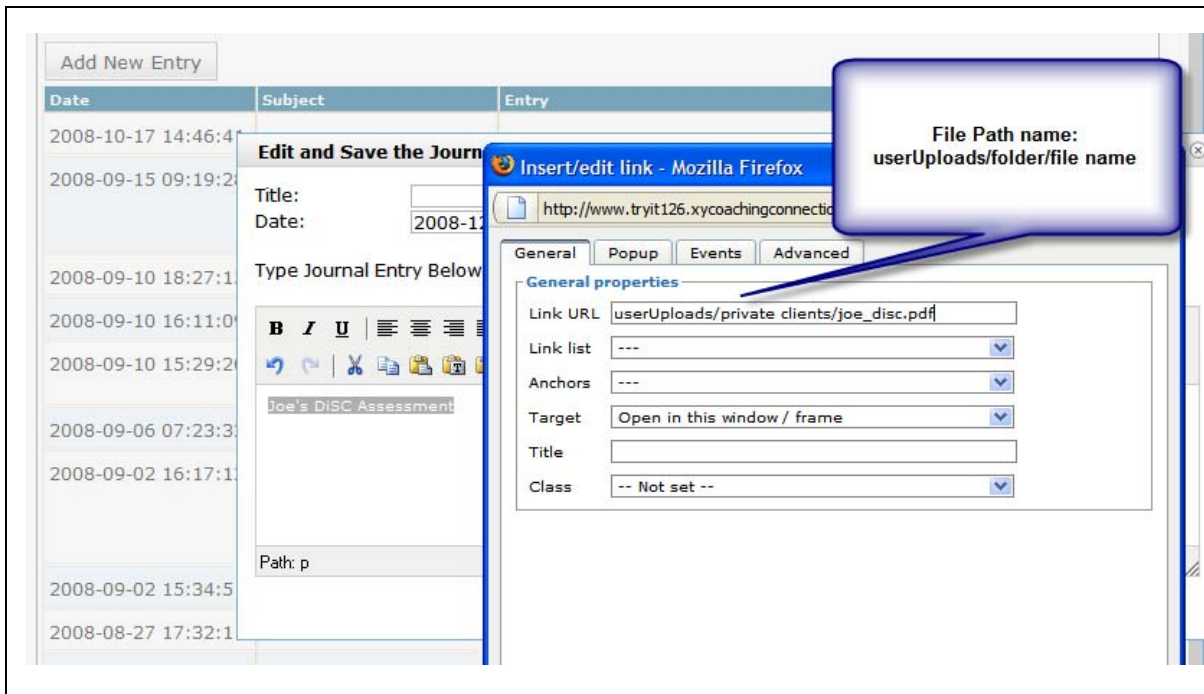
- More importantly, any previously linked files or images (all your work to link files and images will not be able to be accessed through your XY Tool. All is well as long as those folder names are not changed.
- **Public Files:** any files uploaded into the folder names “files” and “images” can be viewed by anyone on your XY Tool when they open the Editor in their Journal. See pic on next page.



- **Private Files:** Example of a private file would be a client's DiSC assessment or some other private document for that client or coach eyes only.



- **Access to Private Files not in Public Files:** The Public Files are accessed through the Editor Tool as in the pic at the top of the page. When you want to provide a link to a Private File you simply type in the file path name. See pic on next page.

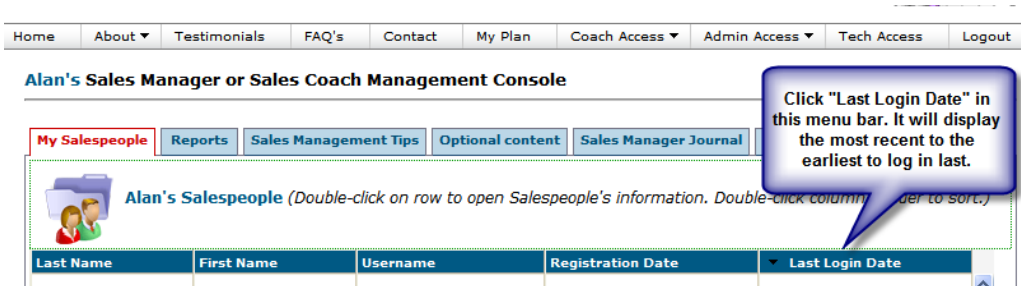


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- **Manage Users:** This gives you a view of all Users and Sub-Users. For example, if you have other coaches working with you and they have the people they are coaching. You could view them here and move a coachee from one coach to another coach. You can also do this from your coach console.
- **Manage News Board:** this is a message that goes to all Users in the tool.

Coach Access – Coach Console

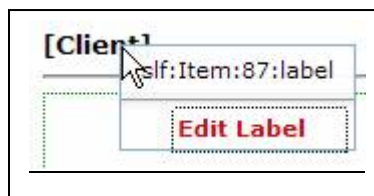
- **Add New Users:** when you add a new user here, this automatically places that person into your sub-user folder under you. You can also make a project a User and let other people have password access to that project for collaboration.
 - You will want to protect your own password since you have admin access with your login, so refrain from patterning passwords for new users after yours, or just change yours to something else so it can't be guessed.
 - Note that passwords for users who are listed under a coach will be visible to that coach, but they will see only their own name and the names of those under, but not above them.
- **Reports:** we can discuss what reports you want to have.
- **Other Tabs** are self explanatory.

- **Coachee Access:** double click on a Coachee's name. This gives you access to their User Information and the Coach Message Board to leave a private message to a coachee.
 - The HTML editor for the Coachee Assignments Form is not yet available. It will be needed for adding links into the Assignments Tab. Coming soon...
 - Who has logged in recently? To see who has logged in most recently click the "Last Login Date" in the top menu bar. This will display the most recent date/time to the earliest date/time.

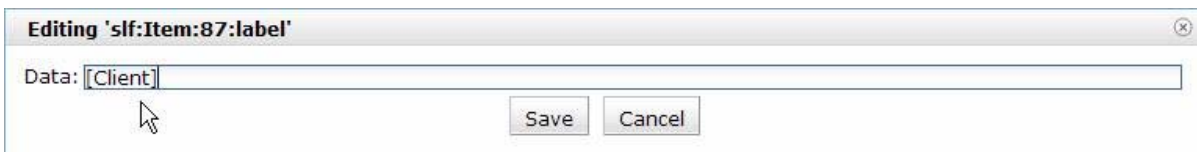


Editing – Content, Tab Labels, Other Phrases, Assessment

- **Content Editing:** you can edit wherever you see a "green dotted" box. Right click inside the green box. Then click "Edit Content". There are also many other editable labels and items outside of the green areas, so if there is a line or word of text you want to edit in a area not bordered in green, try "right-clicking" on the word(s). and you may see this:



- (Click on "edit label" above and you will get the window below where you can type over the exiting text and click "save" to change it.)



- **Tab Label Editing:** right click on the word in the tab. Then click "Edit Label".

- **Any other phrases or words you want to edit.** Try a right click on the word. Many can be edited while others cannot be edited by you and requires Ruth to do so because it may have a database link.

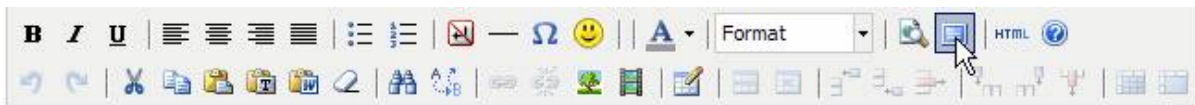
Function and Structure Changes

- **Tab Changes, Deletions, or Additions:** Ruth must do that. It doesn't take much time, but that is a tech level access.

Issues Known to be Caused by Browser Cache

Browsers, Editor Tool, and Journal Display

- **Browsers:** If the browser doesn't load a webpage correctly. Refresh or reload the webpage. If this doesn't work, then Logout and close the browser. The browsers will "cache" the information and sometimes cause the browser to not fully display the information on a webpage.
 - Firefox is the recommended browser. There are still a few (mostly minor) display issues with IE.
 - The HTML editor is much more "FireFox" friendly, so make a point to do all your editing work from FF. (it's a free download if you don't already have it.)
- **Editor Tool:** when you click to edit content the editor tool will open. If you are going to change the size of the window on the editor tool, it is recommended you do that prior to entering any text. There is a bug in the web browser that will sometimes close the editor prematurely if you have typed text into the window and then tried to resize the window.
 - Working from a larger monitor, if possible, will help. You can also switch to "Full Screen Mode" to do the editing (see white arrow pointing to the full screen icon below.)
 - You'll need to toggle back (click the same icon again) to Save the changes, so before switching to full screen mode, be sure the Save Button is visible in the window.



- **Journal Display:** when the journal does not fully display, refresh or reload the webpage or go to another Tab and return to the Journal. You can also click "Add New

Entry". This should cause the Journal to display your entries and vertical scroll bar on the right.

Logged Out of the System

The system automatically logs you out after a period of inactivity.

- **The browser makes it look like I'm still logged in:** This is the cache of the browser. You may be able to view a basic webpage appearance, but you can not access specific data on the webpage.
- You may get a view like this on the following page. It shows some of the page, but the key indicator is that "Login" appears in the top menu bar. A more prominent "You are logged out of the system" indicator will be added in the future.

