EPAS

Explorer Post Administration System

Version 4

LawExploring.com, 2020

Foreword

From all of us on the LawExploring.com team, we sincerely thank you for choosing to use EPAS for your department's needs. The EPAS project has been in the works for a long time and we're happy it looks much different now than it did when we started. We continue to add new features, update appearance, and expand to many different platforms as we move forward in an effort to make post administration easy, secure, and responsive to the changing times. We hope you enjoy EPAS – please let us know if you have any questions, comments, or suggestions!

This documentation is meant to provide the user with an overview of EPAS so he or she may use it effectively. The "General Information" section should be read by everyone to get a basic understanding of some key features of EPAS. Past that, each module has its own section and further information about it that users may refer to for specifics.

Revision History

Revision No.	Revision Date	Description of Change	Approver
IR		Initial Release	JP

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General Information

Contact

We understand the importance of communication and want to make sure that users are able to get in touch with administrators as necessary. For general contact, e-mail is the best method and will usually get a response within 24 hours for normal inquiries. The general administrator email monitored by the whole team is admin@lawexploring.com and can be used for any issue.

For new feature requests, bugs, or suggestions please use the Issue reporting integrated in EPAS. Click the “Issues” link in the sidebar and open an appropriate ticket through there. These tickets are public so other users having the same experience can see if a ticket has been submitted already. For this reason, be careful about posting private information in tickets.

Data Structure

The primary data storage for EPAS is a relational database. The power of EPAS comes from the “relational” aspect, which means that almost all entries for a department are connected in some way. You may notice this through some clever links throughout EPAS or some handy displays on one page that come from a different module; however, the most noticeable aspect of this has to do with deleting data. The figure below shows how each record is related and shows which entries belong to others.

When deleting an entry, any item that is connected “down” the diagram will also be deleted. This makes it easy for you to keep your data clean, but also helps maintain performance throughout the database by removing unneeded records. For example:

1. Deleting an Event also deletes any related Shifts, Shift Assignments, and Attendance records.
2. Deleting a User also deletes any User Actions, Attendance Records, and Shift Assignments.

Keep these relationships in mind when deleting objects as any related objects are automatically deleted and not recoverable!

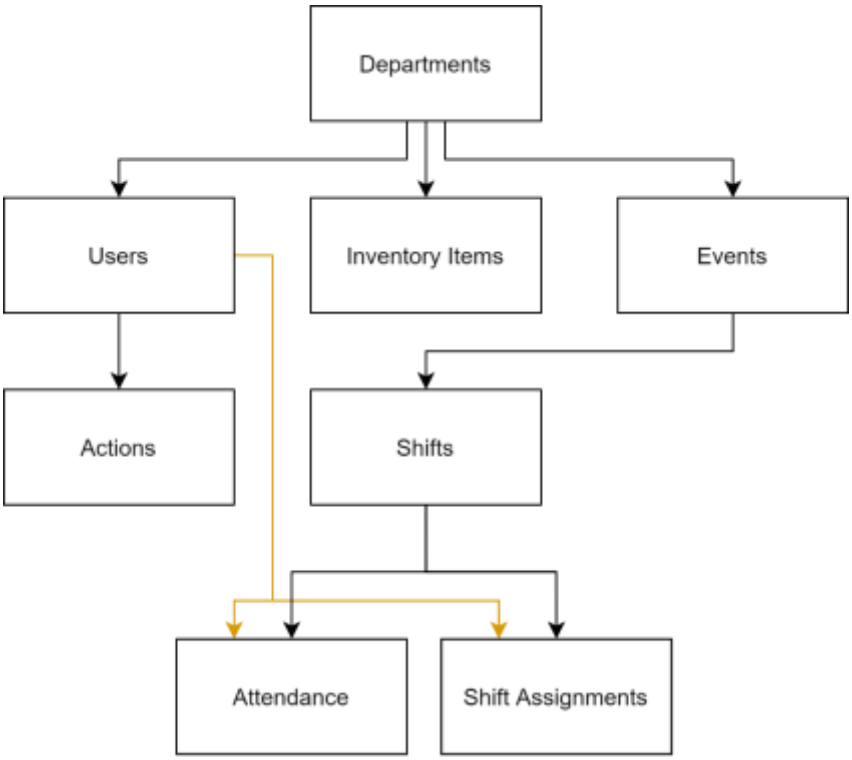


Figure 1. Entity Relationship Diagram. Note: Orange lines in diagram are only to improve readability and do not have different meaning

Access

EPAS was created in part to bring departments in contact with each other from different regions of the United States; however, the data from each department is not meant to be shared. EPAS has built in access control that allows users from one department to manipulate data from their own department but not others. If an issue occurs wherein a user can see data from another department, it is a bug and should be reported to an administrator immediately.

Basic Operation

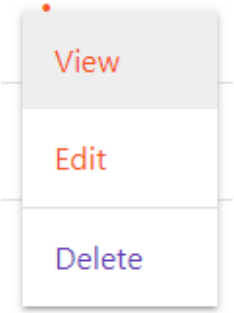
Creating Entries

To access forms in each sub-module used to add a new record, start by navigating to the *index* page for that module. The index page is the landing page of each submodule which shows an overview of all records, and is accessed by selecting one of the links

from the left navigation panel. Once on the index page, click the orange + button in the bottom right of the screen, shown here. After filling all required fields, click the “Save” button at the bottom of the form to submit the record. A toast message will appear indicating the success or failure of the save.

Viewing Entries

View pages allow the user to see more detailed information about an entry that may not be visible on the index page. View pages are accessed through the context menu which appears by clicking the three vertical dots icon on an index page, then selecting “View” from the dropdown menu.

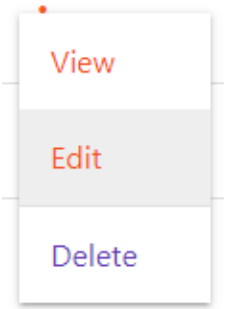


Once on the view page, all details about that record are visible in the topmost card, and selected records from other modules appear below in the “Related” cards.

Editing Entries

The edit page is a form-based page that will contain the same fields as the add page, except data for the selected entry will be filled to the form. Users may change any data that needs updating, then click the save button at the bottom of the form to commit the changes.

The edit page can be accessed from either the index page or the view page. To edit an entry from the index page, click the three vertical dots icon which is in the same row as the entry to be edited. After clicking, select “Edit” from the dropdown menu.

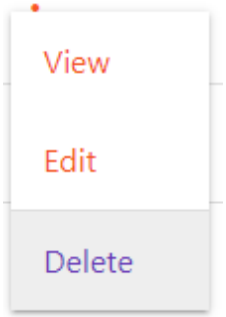


From the view page, simply select the orange and white floating button with the pencil icon

Deleting Entries

I will preface this section by saying that delete operations are limited to certain groups due to the potentially atomic nature of deletes (see Data Structure). For a full explanation of group permissions, see the Group Permissions Matrix.

Deleting a record is done very similarly to viewing or editing entries: simply select the three vertical dot icon and select delete from the dropdown menu. A pop-up window will appear to confirm the deletion – click “Delete” to proceed, or click “Cancel” to go back.



Module Specific Information

The following sections will go into more specific detail about features of each module. The document is laid out to match the order of the sidebar navigation menu in EPAS to make finding matching information easier. For most modules, basic features will not be explained – only those that require special attention have been included below for sake of brevity.

Events

The events module contains everything related to scheduling events, shifts, making shift assignments, and recording attendance after the event has occurred. Several new features have been added over previous version of EPAS that we hope long-time and new users will find useful.

Attendance

Recording Attendance

Attendance records can be added like any other entry by following the process above in Creating Entries one at a time, but this process can be very time consuming for events with many shifts or explorers. To speed this up, we have implemented a method to record attendance for an entire event at one time. Attendance records are automatically created with the same Start and End times as the assigned shift for all shift assignments for that event; however, these records will not show up in any reports until they are reviewed by a post administrator.

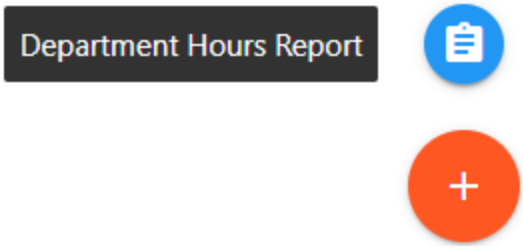
Select the vertical dot icon next to the event for which attendance is to be recorded, then select “Record Attendance” from the drop-down menu. On the next page, there will be a card for each shift assignment entry for the event displaying the user, shift title, start and end times, and position/comment fields.

If changes need to be made to one of the individual records, select the Edit link at the bottom of that card. After saving, the page will redirect back to the Review list. To remove attendance records, click the Delete link under that entry’s card.

Once all records are updated with the desired information, click the green floating check mark button in the lower right of the screen to mark all records as reviewed and commit them to the database.

Department Hours Report

The department hours report is a PDF report that will show a high-level overview of all attendance hours recorded for the department. To access this report, *hover* over the floating "+" button on the attendance index page and a smaller blue report icon should appear. Clicking this blue button will open a dialog that allows you to configure the options of the report.



The report can be tabulated over a specified range of dates as entered in either of the "Range Start" and/or "Range End" fields, or over the entire lifetime of the department by leaving the date fields blank. Meetings can be excluded from the report and category totals if required by department policies by checking the box next to "Exclude Meetings."

The report shows each explorer's cumulative total broken down by category for the range specified.

Events

Viewing Shifts for a Specific Event

On the shifts home page, all shift entries for all events are shown. This page can be filtered to show only shifts from a specific event by selecting the vertical dot icon on the event index page and selecting "Shifts." The resulting page will only show shifts for the selected event.

As an alternative, navigate to the view page for an event and shifts for that event will be listed in the Related Shifts card at the bottom of the page.

Event Report

The event report contains a summary of all event information, including shifts and shift assignments. It is intended to be used pre-event to ensure everything is prepared for the event, or post event to keep an overview handy when reviewing or debriefing the event.

To access the report, go to the “View” page for the event by clicking the three vertical dots next to the event and selecting View. Then, hover over the orange Edit button which will show the blue Event Report button. Click this link to be taken to the report. There are currently no options to configure for this report.

Shifts

Creating Shifts with Sign up Option

One of the features new to this version of EPAS is shifts with the ability for explorers to sign up on their own. When creating a shift, the “Signup Limit” field controls this behavior as explained below. The following inputs are accepted:

Input	Explanation
-1	Disables Sign up option.
0	Unlimited Signups
Other Number	Specified number of spots. Signups after this limit are still recorded as explained below.

Signing Up for Shifts

On the Shifts home page, the right-most column shows the signup limit as the event currently stands. The badge color represents different behaviors as explained on the page and below:

- **Green:** The number represents how many signups are left before reaching the limit.
- **Yellow:** The signup limit has been reached; however, signups are still recorded in case event needs change. The number in the yellow badge is how many requests are ahead of yours.
- **Disabled:** Signups are not taken for this event.

To sign up for a shift that has signups enabled, open the dropdown menu and select “Sign up.” The page should refresh and the number of slots remaining will update.

Shift Assignments

Assigning Shifts

Shift assignments can be entered manually by clicking the add button in the lower right corner of the Shift Assignments index page. Select the shift and user or users to be assigned to that shift, then click the submit button.

Shift assignments can also be made while creating or editing a shift by selecting user(s) from the dropdown list on the shift add/edit form page.

Approving or Denying Shift Requests

Shift requests made from the Shifts section will show up on the Assigned Shifts home page with a status of “Requested.” Outstanding requests are highlighted in orange when this page loads to help keep track of items that need attention. These requests can quickly be approved or denied by selecting the appropriate action from the dropdown menu next to the item to be addressed.

To only view items that need approval, click the link on the dashboard page next to “Unapproved Shift Requests.” This link will directly show only those shift assignments that have the status “Requested.”

Inventory

Inventory Report

The Inventory Report shows a summary of all items for the department, including if they are checked in or out, and to whom it is checked out as well as details about every item. To access the report, hover over the floating “+” button on the Inventory home page. Then, click on the blue report button that comes up to be taken to the report. Currently this report has no options to configure.

Users

Permissions

As EPAS has evolved to add more features, one of the necessary steps from a development standpoint was to implement a way to control access to actions within a department. Previously, only ranking members of the post would use EPAS to input and retrieve data; now, our goal is for posts to use EPAS as a central hub for all members of the department. What resulted from this vision is a simple group-based permission system to help posts maintain control of their records.

Each user is assigned to one of three groups – Post Administrator, Manager, or Standard – and each group can perform certain actions. Post Administrators are the top level and can add and delete data, view records of all post members, and approve and deny requests. Managers are the next level, and are intended to help distribute some responsibilities to other explorers capable of giving some extra help. Managers have limited delete powers, but can still view other explorers' records and approve sign-up requests. Finally, Standard is the most basic level of access to EPAS. These explorers can only view records related directly to them (user information) or records intended to be seen by the whole department (events and meetings) as shown in the table by yellow "Own" cells. They do not have any delete powers and cannot approve sign-up requests.

See the table below for a full overview of each group's permissions.

Group Permission Matrix

		Add	Edit	View	Delete	Index		
DEPARTMENTS	Post Administrator	-	Own	+	-	+		
	Manager	-	-	+	-	+		
	Standard	-	-	Own	-	+		
USERS	PA	+	+	+	+	+		
	M	+	+	+	-	+		
	S	-	Own	Own	-	+		
ACTIONS	PA	+	+	+	+	+		
	M	+	+	+	-	+		
	S	-	-	Own	-	Own		
EVENTS	PA	+	+	+	+	+		
	M	+	+	+	+	+		
	S	-	-	+	-	+		
							Sign Up	
SHIFTS	PA	+	+	+	+	+	+	
	M	+	+	+	+	+	+	
	S	-	-	+	-	+	+	
							Approve	**Deny**
ASSIGNED SHIFTS	PA	+	+	+	+	+	+	+
	M	+	+	+	-	+	+	+
	S	-	-	Own	-	Own	-	-
ATTENDANCE	PA	+	+	+	+	+		
	M	+	+	+	-	+		
	S	-	-	Own	-	Own		

INVENTORY	PA	+	+	+	+	+		
	M	+	+	+	-	+		
	S	-	-	Own	-	Own		
ISSUES	PA	+	Own	+	-	+		
	M	+	Own	+	-	+		
	S	+	Own	+	-	+		

User Reports

The User report is a comprehensive report that includes all of the user's personal information, all actions tracked for the user, all attendance information, and any inventory items checked out to the user.

To access the report, first navigate to the Users home page, then go to that users' view page. Next, hover over the floating orange Edit button to bring up the blue report link. Click the link to be taken to the user report. There are currently no options to configure for this report.