



USER GUIDE: LIA ADMINISTRATOR ROLE

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Overview

This **User Guide** will review the capabilities and responsibilities for the **Local Implementing Agency Administrator** role. This role will be referred to as the LIA Admin.

Q1: WHAT IS THE LIA ADMIN ROLE?

A1: The LIA Admin role will be the Administrator Role for your agency.

Each LIA should designate one person from their agency to hold the LIA Admin Role. This designated person will be responsible for assisting all users within its LIA when making edits or changes to their Tracking Data.

In the future, we will plan to enhance the capabilities of the LA Admin to include things like approving and managing users for its LIA.

Q2: HOW DO I BECOME THE LIA ADMIN ROLE FOR MY LIA?

Q2: Ideally each LIA will have one designated person to hold the LIA Admin role. We will be working with each LIA lead to determine who should take on the role.

All LIA Admin requests or changes should be sent to your Local Agency Liaison. The Local Agency Liaison will give you LIA Admin access and provide a confirmation email.

All LIA Admins should review this user guide and the LA Admin webinar training materials.

Q3: WHAT ARE THE CAPABILITIES OF THE LIA ADMIN ROLE?

A3: The LIA Admin Role will have enhanced capabilities with editing and revising the **Action Info. & Tracking Data** tabs. The two enhanced capabilities will be covered in more detail in the second section of this guide.

This includes:

- Editing Tracking Data & Info. after the Action or Sub-Action has been marked as complete.
- Canceling an Action or Sub-action after the trigger date has passed.

LIA Admin capabilities are meant to enhance the experience for the LIA user and **not** meant for assigning a sole person to do the data entry for your LIA.

Q4: CAN THE LIA ADMIN ROLE CHANGE ALL THE DATA FOR AN ACTION?

A4: No, SEEDS has fields that activate other parts of the system. Because of this certain fields will be locked and *cannot be edited by anyone* besides the IT team through the backend.

We can work with you to make these edits **if they cause errors in other parts of your SEEDS Data**. Remember an action can be canceled if it was created in error. This first year is a learning year so we anticipate that there will be a learning curve.

These are the fields that will be locked and not editable because they activate other parts of the system:

- When creating an Action there are 5 mandatory fields that once saved cannot be edited:
 1. Strategy
 2. Activity/Track
 3. Action Type
 4. Group
 5. Number in Series, only when Series is chosen for group
 - a. Cannot be edited on Info. tab.
 - b. Can be increased by adding sub-actions but cannot be decreased
- The trigger date will be locked if it is in the past.
 - The system checks the trigger date against the current date. If it is in the past it will be locked and not editable. This will be automatically done by SEEDS on an ongoing basis.

Another trigger (non-editable) scenario:

- If you have created an Action that is a series, and all Sub-Actions and the Main Action have been marked as complete, SEEDS will not allow you to add any additional Sub-Actions or cancel.
 - The system needs to have a method for closing out Main Actions, so if ALL the related Sub-Actions have been marked as complete you will no longer be allowed to add Sub-Actions to that series it will be completed.
 - As the LIA Admin you will be able to edit the data but not add additional Sub-Actions or cancel.

USER GUIDE

This part of the guide will outline the steps and screens that you will see when making changes that are LIA Admin role capabilities only.

I. EDITING AFTER AN ACTION HAS BEEN “COMPLETED”

In Phase 2.2 there will be statuses added to the Info. tab for each Action and Sub-Action. These statuses are to assist users in knowing what the current status of the Action.

LIA Users will not be allowed to make changes to an Action that has been completed. **BUT...**

LIA Admins will be able to make changes to editable fields after an Action is completed.

Screen Enabled for Editing:

The screenshot shows the 'Action Details' form with the following elements:

- Info. / Tracking Data** tabs at the top.
- Strategy:** Farm to Institution (greyed out)
- Activity (Track):** CSA (Single) (greyed out)
- Group:** Single (greyed out)
- Action Type:** Meeting (greyed out)
- Action Name:** LA Admin test
- Action Date:** 01/01/2018 12:16 PM (greyed out)
- LIA Lead Staff:** Edith
- Resource:** Other (greyed out)
- Resource Description:** Resources xyz
- Internal Evaluation:** No (greyed out)
- Notes:** Maximum Length is 1000 characters
- Activate or Cancel Action:** A green toggle switch with a red 'X' over it, indicating it is disabled.
- Select Community/Site:** Phoenix (selected), Desert Mission Food Bank, Phoenix Public Market
- Buttons:** Cancel and Complete Action (highlighted in yellow)
- Status:** A green 'Completed' status indicator in the top right corner (highlighted in yellow).

All fields are editable (except the trigger fields that are in grey.)

Please note: An action cannot be canceled or moved out of “Completed” status after **marking as complete** they can only be edited. This is why there is no longer a “save” button. You will only “Complete Action” after you make changes.

II. CANCELING ACTION AND SUB-ACTION (S) AFTER TRIGGER DATE HAS PASSED

LIA Users will not be allowed to cancel an Action or Sub-Action after the Trigger date (when in Pending Data status). **BUT...**

LIA Admins will be able to cancel Actions and or Sub-Actions after the trigger date.

 Please note that canceling Actions and Sub-Actions will only be available before you mark as complete. If you or someone from your LIA marked it a complete, ONLY LIA Admins will only be allowed Edit data.