AgView Training

REGISTRATION STARTER GUIDE FOR PRODUCERS, CLINICS, AND VETERINARIANS

Acknowledgements

This training guide was created by the Institute for Infectious Animal Diseases.
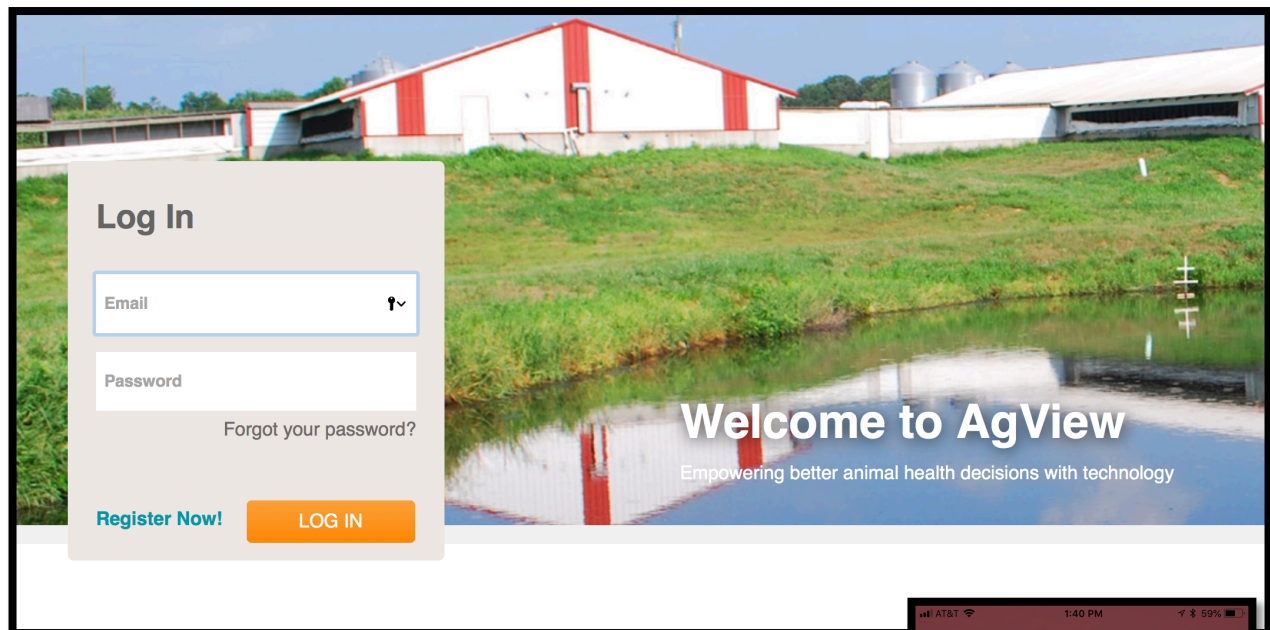
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PART I
The Registration Page

Two Options:
1. Register via link.
2. Register via mobile app.

Registering via link:
1. Go to agview.com.
2. Click "Register Now!" to go to the registration page.

Registering via mobile app:
1. Download the AgView app from the Apple App Store or Google Play Store to your mobile device. The app is free to download.
2. Launch the app.
3. Tap 'Request Account' on the login screen of the app. You will be redirected to the registration page within your device's web browser.
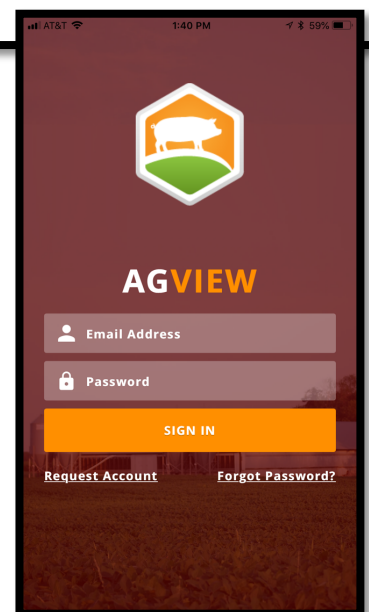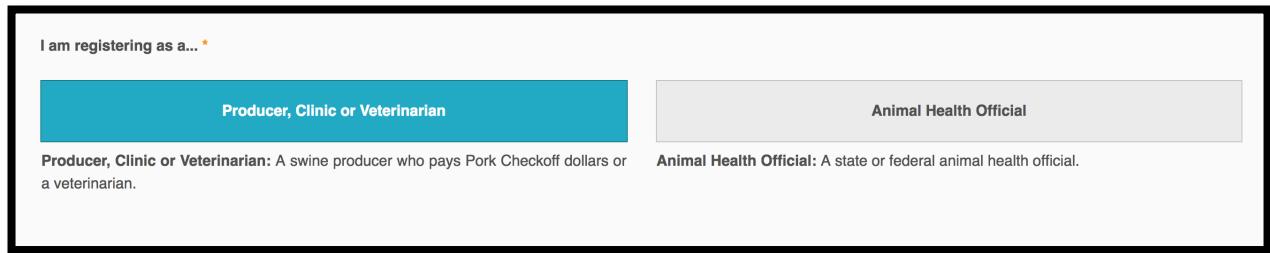
PART II
The Registration Form

For the sections in Part II, follow the steps associated with your organization type. There are three organization types:

1. Swine Producer (multiple users like company veterinarians and staff)
2. Clinic (multiple users like clinic veterinarians and staff)
3. Individual Practitioner (solo user, only one person will use this account)

SWINE PRODUCER

Filling out the registration form:
1. By default, the registration form will select "Producer, Clinic, or Veterinarian" as the type of organization you are registering as. Nothing needs to be changed at this step.

I am registering as a... *

Producer, Clinic or Veterinarian	Animal Health Official

Producer, Clinic or Veterinarian: A swine producer who pays Pork Checkoff dollars or a veterinarian.

Animal Health Official: A state or federal animal health official.

2. Click the checkbox next to "CVI" beneath Tools Requested.

Tools Requested *

Access to: ☐ CVI ⓘ

3. Fill out the organization information section.
Note: All fields with a star are required.

- In the **organization name** field, enter your producer's name.
- In the email, name, and phone fields, enter the information for your producer's initial administrator.
  Note: The administrator (admin) is essentially the first user for the account who is responsible for creating and managing additional users. This process is discussed further in **Parts IV** and **V**.

4. Click the "Continue" button at the bottom of the page.

5. Review your information and click the "Submit Request" button at the bottom of the page.

6. A registration request email confirmation will be sent to the email address entered for the initial administrator.

7. After the account has been approved by the AgView administrators, another email will be sent that includes a password reset link for the initial administrator. After resetting the password, the administrator can login to AgView at agview.com.

CLINIC

Filling out the registration form:
1. By default, the registration form will select "Producer, Clinic, or Veterinarian" as the type of organization you are registering as. Nothing needs to be changed at this step.

2. Click the checkbox next to "CVI" beneath Tools Requested.

3. Fill out the organization information section.
   Note: All fields with a star are required.

- In the **organization name** field, enter your clinic's name.
- In the email, name, and phone fields, enter the information for your clinic's initial administrator.
  Note: The administrator (admin) is essentially the first user for the account who is responsible for creating and managing additional users. This process is discussed further in **Parts IV** and **V**.

4. Click the "Continue" button at the bottom of the page.

CONTINUE

5. Review your information and click the "Submit Request" button at the bottom of the page.

SUBMIT REQUEST

6. A registration request email confirmation will be sent to the email address entered for the initial administrator.

7. After the account has been approved by the AgView administrators, another email will be sent that includes a password reset link for the initial administrator. After resetting the password, the administrator can login to AgView at agview.com.

INDIVIDUAL PRACTITIONER

Filling out the registration form:
1. By default, the registration form will select "Producer, Clinic, or Veterinarian" as the type of organization you are registering as. Nothing needs to be changed at this step.

I am registering as a... *

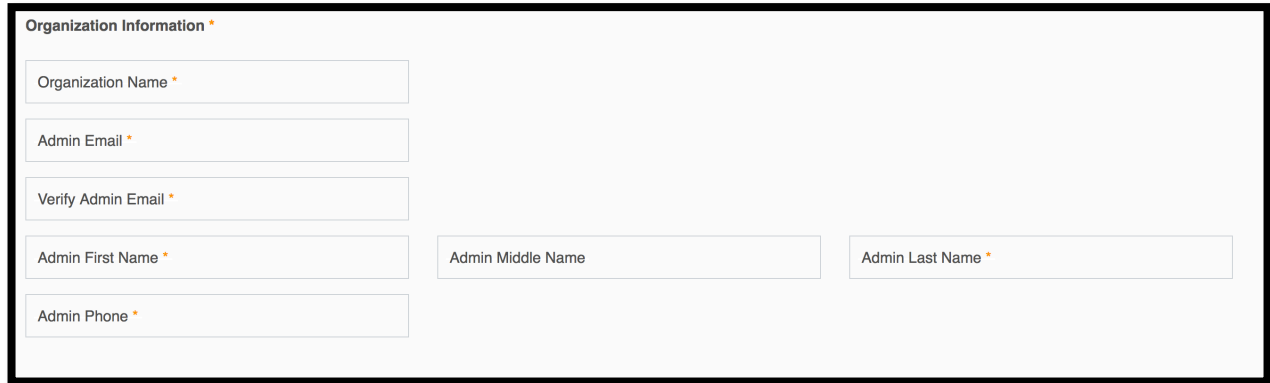| Producer, Clinic or Veterinarian	Animal Health Official
Producer, Clinic or Veterinarian: A swine producer who pays Pork Checkoff dollars or a veterinarian.	**Animal Health Official:** A state or federal animal health official.

2. Click the checkbox next to "CVI" beneath Tools Requested.

Tools Requested *

Access to: ☐ CVI ⑦

3. Fill out the organization information section.
   Note: All fields with a star are required.

Organization Information *

Organization Name *

Admin Email *

Verify Admin Email *

Admin First Name *   Admin Middle Name   Admin Last Name *

Admin Phone *

- In the **organization name** field, enter your name or the name of your solo practice.
- In the email, name, and phone fields, enter your information.

4. Click the "Continue" button at the bottom of the page.

CONTINUE

5. Review your information and click the "Submit Request" button at the bottom of the page.

SUBMIT REQUEST

6. A registration request email confirmation will be sent to the email address you entered.

7. After the account has been approved by the AgView administrators, another email will be sent to you that includes a password reset link. After resetting the password, you can login to AgView at agview.com.
   Note: Since you are the only user of the account, you are the "Initial Administrator".

PART III
AgView Account Setup

Upon logging in, the initial administrator will land on the "Dashboard" page. Click on the "Admin" button in the upper right-hand corner to navigate to the Admin Page.
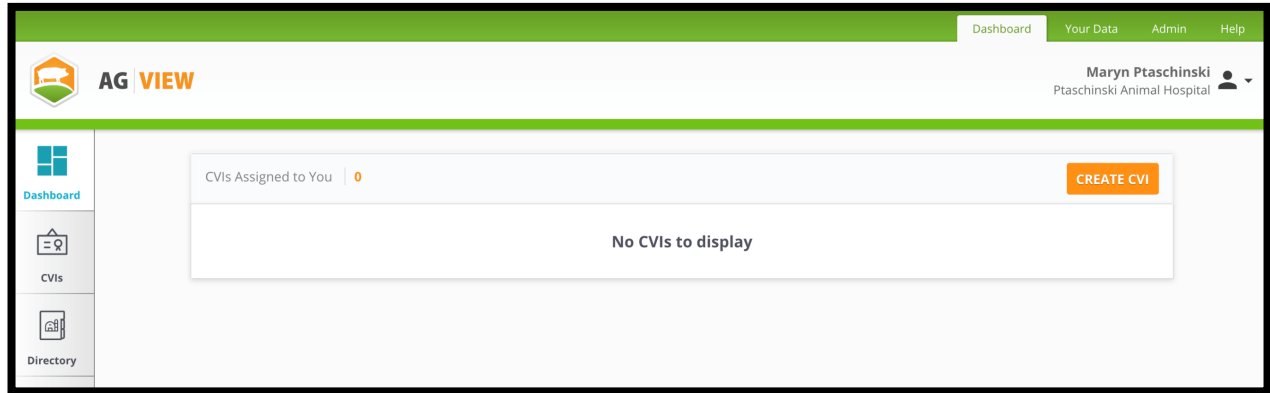
On the Admin Page, there is a list of tabs on the left-hand side of the screen: All Account Users, Standard Users, Veterinarians, Administrators, Operators, Account Settings, and Inactive Users.

All Account Users
List of all users who have accounts for the organization.
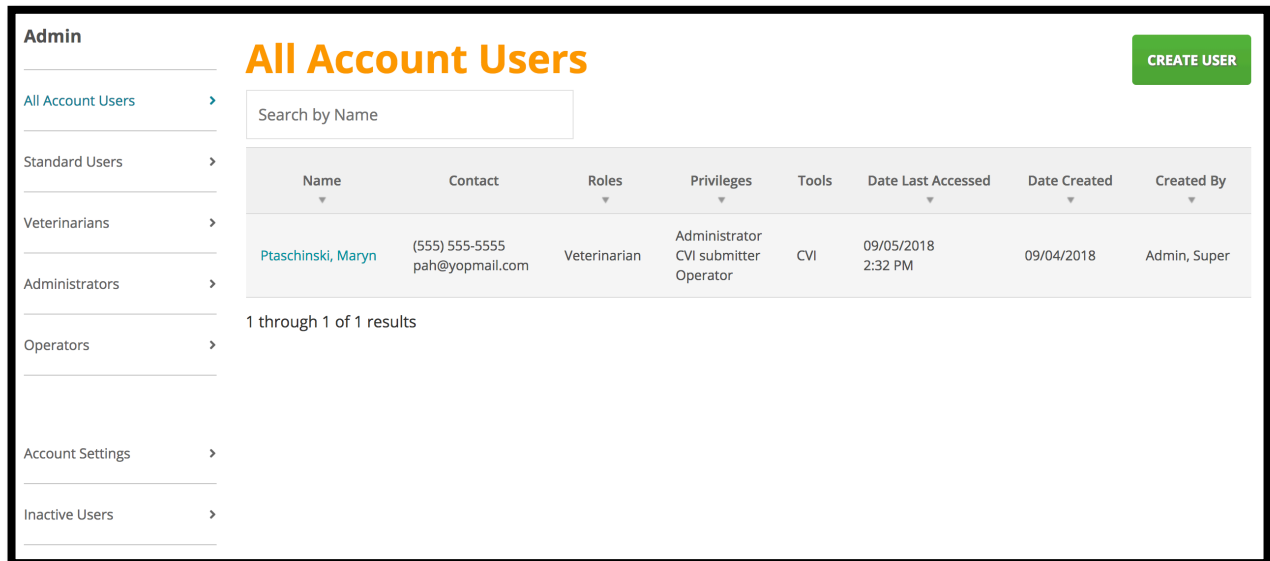
Standard Users

List of all users with the Standard User role. Standard Users have the ability to fill out CVIs and assign CVIs to veterinarians for completion/signature.

Admin

All Account Users >						
Standard Users >						
Veterinarians >						
Administrators >						
Operators >						
Account Settings >						
Inactive Users >						

Standard Users

CREATE USER

Search by Name

Name ▼	Contact	Privileges ▼	Tools	Date Last Accessed ▼	Date Created ▼	Created By ▼
			No data available in table			

Showing 0 to 0 of 0 entries

Veterinarians

List of all users with the Veterinarian role. Veterinarians have the ability to fill out and sign CVIs.

Admin

All Account Users >						
Standard Users >						
Veterinarians >						
Administrators >						
Operators >						
Account Settings >						
Inactive Users >						

Veterinarians

CREATE USER

Search by Name

Name ▼	Contact	Privileges ▼	Tools	Date Last Accessed ▼	Date Created ▼	Created By ▼
Ptaschinski, Maryn	(555) 555-5555 pah@yopmail.com	Administrator CVI submitter Operator	CVI	09/05/2018 2:32 PM	09/04/2018	Admin, Super

1 through 1 of 1 results

Administrators

List of all users with the Administrator privilege. Administrators are responsible for creating and managing individual accounts for the organization.

Operators

List of all users with the Operator privilege. Operators are responsible for managing data for the organization and uploading addresses through AgView to be used when filling out CVIs.

CVI Submitter (not listed as a separate tab)

Privilege that can be granted to Veterinarian users. Veterinarian users **must be granted** this privilege by the State Animal Health Official's office where they are licensed before being allowed to use the AgView CVI tool to submit CVIs on behalf of the organization.

Roles vs. Privileges

Roles
- Standard Users
- Veterinarians

Note: Role can change from Standard User to Veterinarian but not from Veterinarian to Standard User.

Privileges
- Administrators
- Operators
- CVI submitters

Note: Administrator and Operator privileges can be granted to any user. The CVI submitter privilege can only be granted to Veterinarian users.

Initial User Setup

For this section, follow the steps based on whether your account will have a single user or multiple users.

Single User (i.e., solo veterinarian)

By default, the person who registered the account is setup as a Standard User with Administrator and Operator privileges. As an individual practitioner, you will first need to switch roles from Standard User to Veterinarian before you can use the CVI tool to submit health certificates.
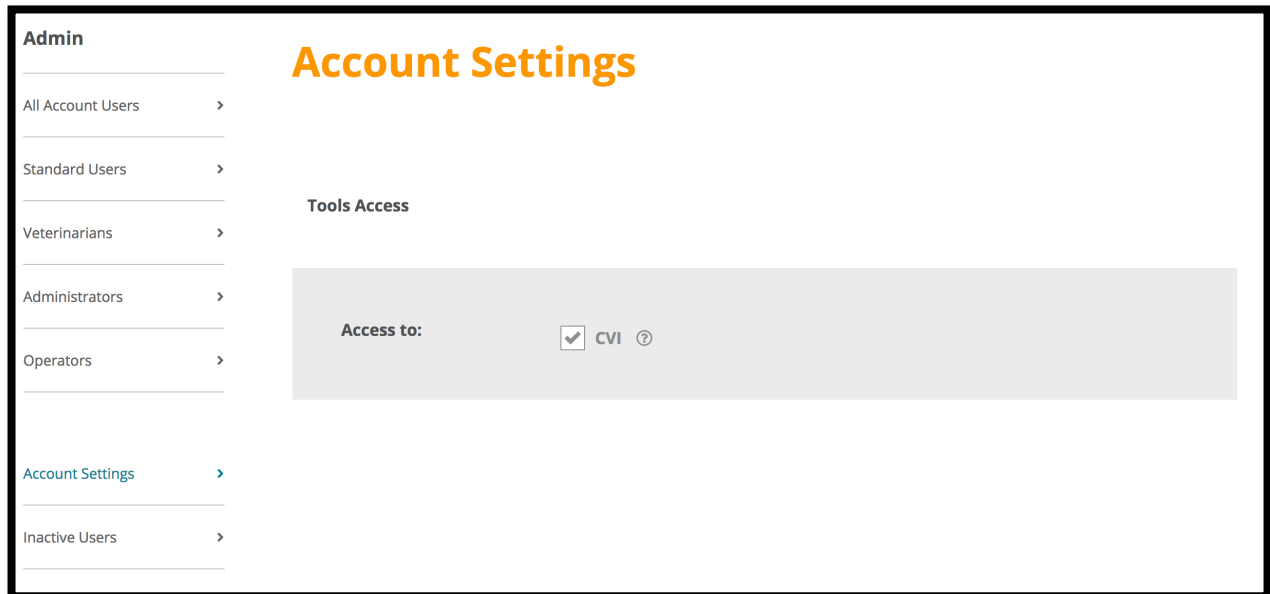
1. Under "All Account Users", you should see your name, contact info, roles, etc.
2. Click on your name (will be a clickable link).
3. Click the "Edit" button at the bottom right-hand corner of the page.
4. Click on the "Veterinarian" button.
5. Click the box next to "Allow this Veterinarian to submit CVIs".
6. Enter your license and accreditation information. See **Part IV: Creating Users** for more details.

Multiple Users

1. Under "All Account Users", you should see the name, contact info, roles, etc. for the initial administrator.
2. Skip to **Part IV: Creating Users** to add new users to the organization.

Account Settings

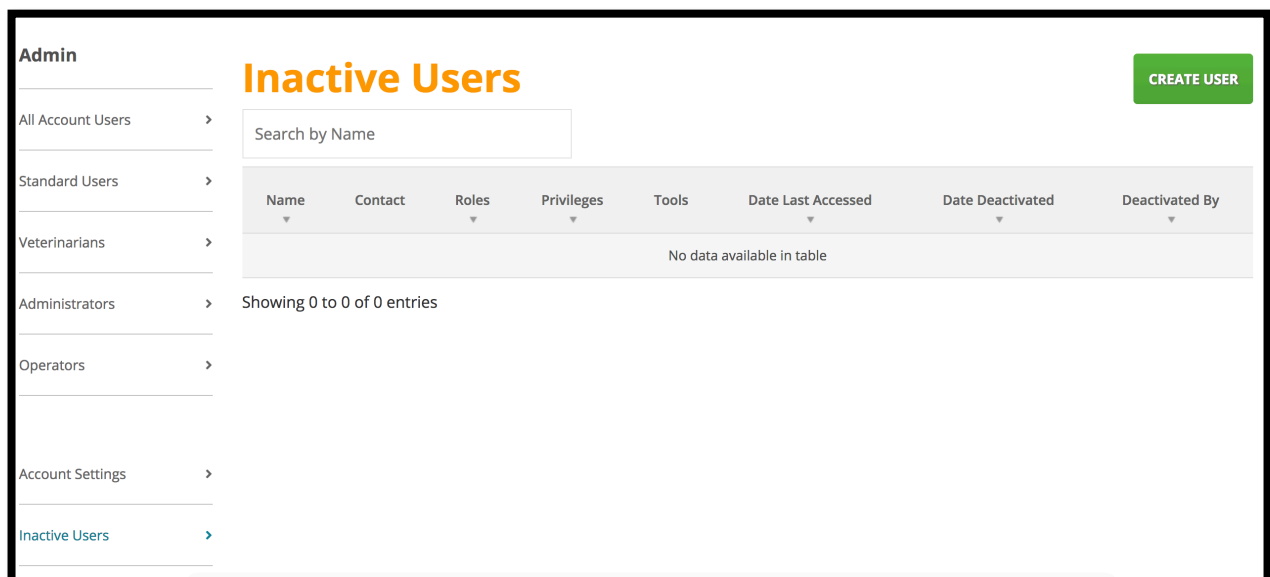Click on the Account Settings tab to view tool access for your organization/account.

Note: At this time the CVI tool is the only tool available to select within the AgView suite of tools.

Inactive Users

Click on the Inactive Users tab to view accounts that have been deactivated.
Note: These are accounts that were deactivated by your organization's administrator(s). More information about deactivating accounts can be found in **Part V: Editing Users**.

PART IV
Creating Users

Any user with the administrator privilege can add new users to the organization. Follow the steps below to add users:

1. From the All Account Users tab, click on the 'Create User' button in the upper right-hand side of the page.

   CREATE USER

2. Select the user's role (Standard User or Veterinarian) by clicking the associated button.

Standard User

Create a new user as a... *

Standard User	**Veterinarian**
The standard user is responsible for:	**The veterinarian is responsible for:**
• Filling out and submitting field data reports (if organization is using the Health Reports tool) • Filling out CVIs (if organization is using the CVI tool) • Assigning CVIs to organization veterinarians for signature (if organization is using the CVI tool) • Utilizing the AgView dashboard (if organization is using the AgView tool)	• Filling out and submitting field data reports (if organization is using the Health Reports tool) • Adding comments and diagnoses to field data reports (if organization is using the Health Reports tool) • Filling out and signing CVIs (if organization is using the CVI tool) • Utilizing the AgView dashboard (if organization is using the AgView tool) • Receiving war time messages (if organization is using the AgView tool)

Veterinarian

Create a new user as a... *

Standard User	**Veterinarian**
The standard user is responsible for:	**The veterinarian is responsible for:**
• Filling out and submitting field data reports (if organization is using the Health Reports tool) • Filling out CVIs (if organization is using the CVI tool) • Assigning CVIs to organization veterinarians for signature (if organization is using the CVI tool) • Utilizing the AgView dashboard (if organization is using the AgView tool)	• Filling out and submitting field data reports (if organization is using the Health Reports tool) • Adding comments and diagnoses to field data reports (if organization is using the Health Reports tool) • Filling out and signing CVIs (if organization is using the CVI tool) • Utilizing the AgView dashboard (if organization is using the AgView tool) • Receiving war time messages (if organization is using the AgView tool)

3. Select any relevant privileges by checking the boxes.
   Note: You <u>do not</u> have to assign privileges to a user.

4. Select the checkbox next to CVI to grant the user access to the tool.

5. Fill out the user's information.
   Note: Email addresses can only be used once within an organization (i.e., the same email address cannot be used for both a standard user and a veterinarian).

6. If the user is a 'Veterinarian' and should be allowed to submit CVIs, check the box next to "Allow this Veterinarian to submit CVIs."

7. Enter the veterinarian's accreditation number. The system will check for any existing licenses associated with that accreditation number (e.g., veterinarians licensed in multiple states) . Any previously entered license information will be displayed in the licenses table.

Accreditation and Licenses

Without verifying accreditation, a user may not submit CVIs.

Please enter USDA Accreditation number below to check the system for existing licenses associated with the accreditation.

USDA Accreditation Number: *

Accreditation Type:*
Select ▾

Accreditation Expiration

Note: The veterinarian user **will have to be approved** by the State Animal Health Official's office where he/she is licensed prior to having signature authority on a CVI.

If the lookup does not return any licenses, or if the veterinarian has any additional state licenses, add them by clicking the "Add State License" button. Click "Remove" to delete any licenses entered by mistake.

ADD STATE LICENSE

Licenses

Veterinarians may only submit CVIs in states for which they are licensed.

Issuing State *	License Number *	License Expiration *	
Select ▾			REMOVE

ADD STATE LICENSE

8. Click the "Continue" button.   **CONTINUE**

9. Review the user's information. If everything looks correct, click "Create User." Click "Previous" to make any needed changes.   **PREVIOUS**   **CREATE USER**

10. An email will be sent to the newly created user that includes instructions for resetting his/her password.

Success

You have successfully created the user. Please see below for user details. An email confirmation will be sent to the new user shortly.

Note: After resetting the password, the user will be able to login and use the CVI tool on his/her platform of choice (desktop, iOS device, Android device).

PART V
Editing Users

Users can be edited by an organization administrator at any time. The following sections include steps for making various edit types.
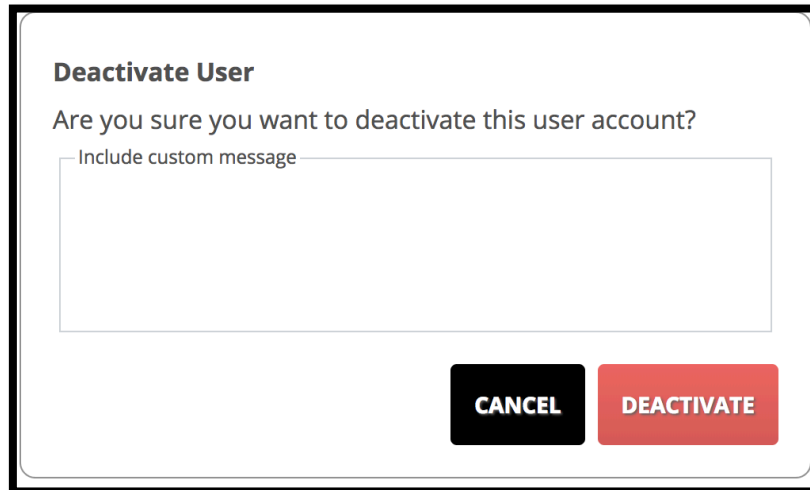
Adding or Removing Privileges and Updating User Info:

1. Find the user by searching within the "All Account Users" tab or in his/her role or privilege category. Click on the user's name (will be a clickable link).

2. Click the "Edit" button.   EDIT

3. Make the necessary edits (e.g., update user information, add or remove privileges).

4. Click the "Update User" button.   UPDATE USER

Deactivating Users
Follow the steps below to deactivate a user.
Note: Deactivated users can always be reactivated. See the "Reactivating User" steps below.

1. Find the user by searching within the "All Account Users" tab or in his/her role or privilege category. Click on the user's name (will be a clickable link).

2. Click the "Edit" button.   EDIT

3. Click the "Deactivate" button.   DEACTIVATE

4. Enter a custom message to provide a reason for deactivation. This message will be emailed to the user.

Deactivate User

Are you sure you want to deactivate this user account?

Include custom message

CANCEL   DEACTIVATE

5. Click "Deactivate" to officially deactivate the account or click "Cancel" if you change your mind.

Reactivating Users

Follow the steps below to reactivate a previously deactivated user.

1. Find the user by searching in the "Inactive Users" tab. Click on the user's name (will be a clickable link).

2. Click the "Edit" button.   EDIT

3. Click the "Activate" button. The user is now reactivated.   ACTIVATE

4. The user will receive an email letting him/her know the account has been reactivated that includes a password reset link.

Remove Ability for Veterinarian User to Submit CVIs for the Organization

1. Find the user by searching within the "All Account Users" tab or in his/her role or privilege category. Click on the user's name (will be a clickable link).

2. Click the "Edit" button.   EDIT

3. Uncheck the box next to "CVI" in the Tools Requested section.
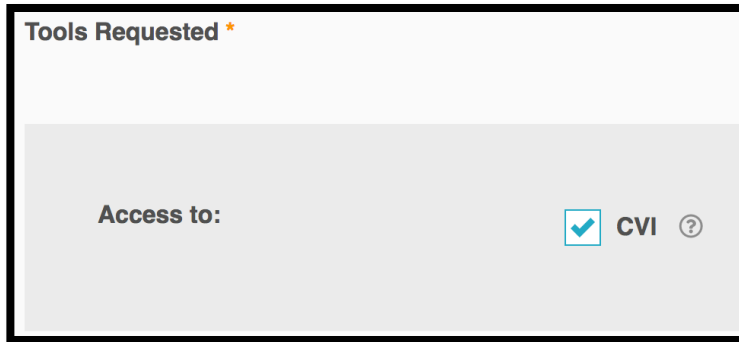
4. Recheck the "CVI" box in the Tools Requested section. The box next to "Allow this Veterinarian to submit CVIs" should now be unchecked.
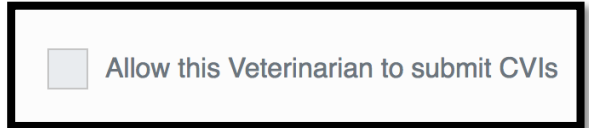
5. Click the "Continue" button.
   Note: You can always re-grant the CVI submitter privilege by editing the user and rechecking the box next to "Allow this Veterinarian to submit CVIs".


PART VI
Uploading Data

Users with the Operator privilege have the ability to upload addresses through AgView to be used when filling out CVIs. Any addresses added by the operator(s) will be available for all users within the organization.

Navigating to the data upload page:

1. After logging into the AgView site, click on "Your Data" in the upper right-hand corner of the screen. You will land on the Data History page.

2. There are 3 tabs on the left-hand side of the screen: Data History, Upload Data, and Use Core Data Schemas.
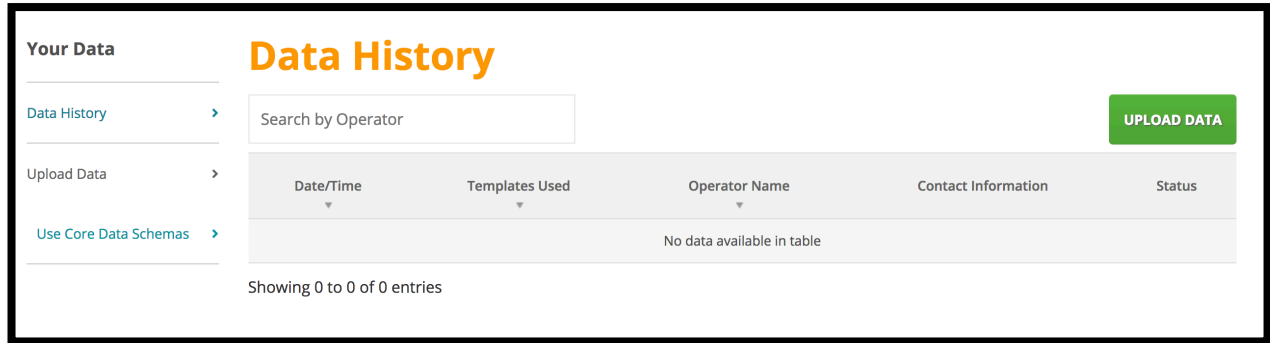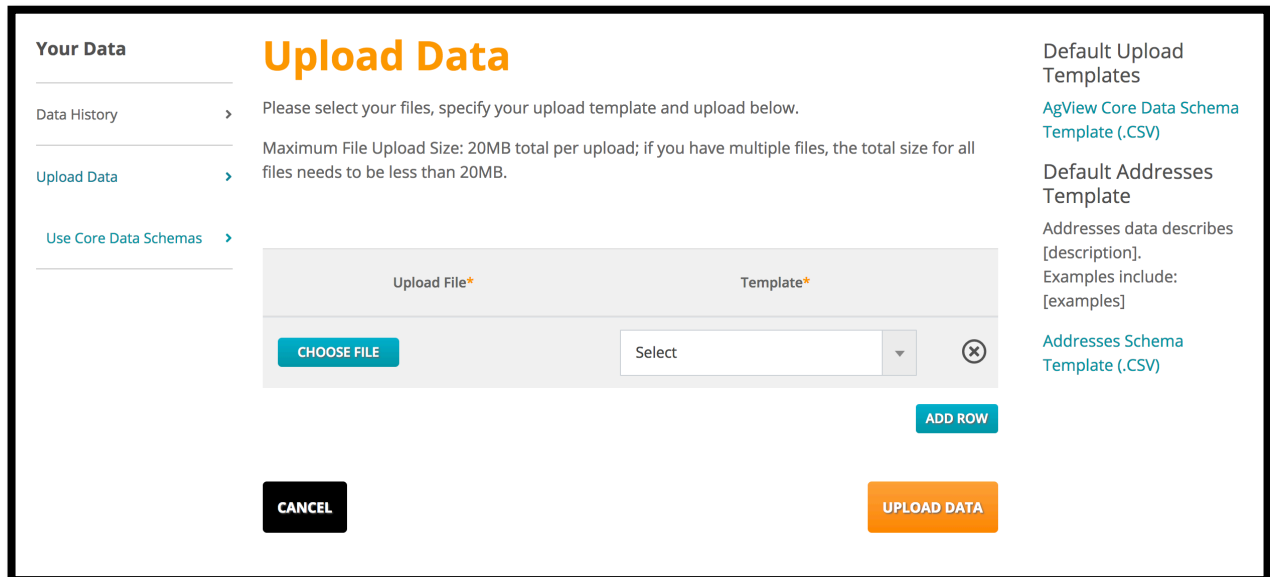

Data History
Shows a running history of all previous data uploads. The table shows some basic information including the operator who uploaded the data and the date/time the upload occurred.
Note: Click the "Upload Data" button to navigate quickly to the data upload section.
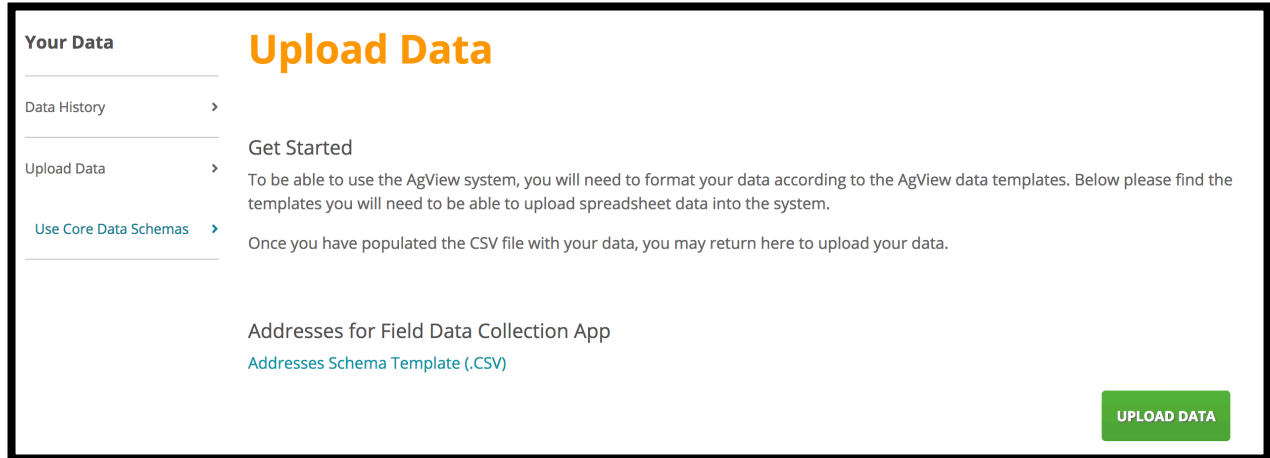
Upload Data
This section is where data is uploaded. Files are uploaded using a template. You will find default templates on the right-hand side of the page.
Note: For CVI addresses, use the "Addresses Schema Template".

Use Core Data Schemas

This section includes templates for uploading data into the system. At this time, the only available template is the "Addresses Schema Template".
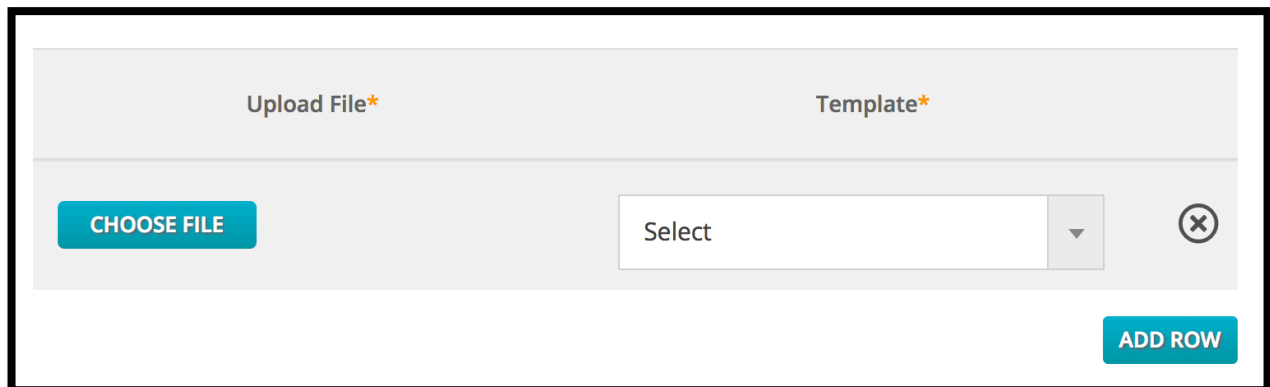

Uploading CVI Addresses

Follow the steps below to upload address data (i.e., consignor and consignee locations) into AgView to be used to prepopulate CVIs. Remember that only operators have access to the data upload features. Operator privileges can be granted to any user.

In order to upload CVI addresses, download the "Addresses Schema Template". Fill out the downloaded template with the address data you want to upload, and then save the completed template as a .CSV file. Once the data is in the correct format (.CSV file) and template (Addresses Schema Template), it is ready for upload.

1. Navigate to the "Upload Data" section.
2. Click the "Choose File" button and select the .CSV file.

3. Select "Default CVI Addresses" as the template.

4. Click the "Upload Data" button. You will be taken to a confirmation screen to verify the upload transaction.
5. Click the "Data History" link at the top of the page or the "Back To Data Upload & History" button at the bottom of the page to view the status of your upload.

Upload Data

Your data is being processed. Please check the Data History page for status updates.

Uploaded File	Template	Status
Addresses_Schema_Template.csv	Default CVI Addresses	Processing

BACK TO DATA UPLOAD & HISTORY

6. Back on the Data History page, the status should be "completed" if the upload was successful.
   Note: Larger files may take longer to upload. A status of "pending" means that the files have not finished processing.

Data History

Search by Operator   UPLOAD DATA

Date/Time ▼	Templates Used ▼	Operator Name ▼	Contact Information	Status
09/05/2018 3:17 PM	Default CVI Addresses	Ptaschinski, Maryn	pah@yopmail.com (555) 555-5555	Completed. 1/1 records successfully processed.

7. Uploaded addresses will be immediately available in the app for all organization users as long as they have good connectivity. Addresses are synced upon login and when moving between tabs.

Glossary

Administrator
An AgView privilege that allows the user to create and manage individual accounts for an organization

AgView
Tool that allows data visualization, analysis, and controlled sharing of multiple types of data including premises, movements, laboratory test results and observational data

Certificate of Veterinary Inspection (CVI)
Tool that allows users to generate electronic CVI's via either a desktop or mobile application

Consignor
The person or entity sending the animal(s)

Consignee
The person or entity receiving the animal(s)

Data Schema
Template for uploading data into the AgView system

CVI Address
Saved location information that can be used to load consignor and consignee information into a CVI

Operator
An AgView privilege that allows the user to manage data for an organization

Type 1
Permission to use the Small Animal Certificate of Veterinary Inspection (excludes food and fiber species, horses, birds, farm-raised aquatic animals, all other livestock species, and zoo animals that can transmit exotic animal diseases to livestock)

Type 2
Permission to use both the Large and Small Animal Certificate of Veterinary Inspection (all animals)