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## APPENDIX G. OTHER SYSTEMS USER'S GUIDE

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### USER GUIDES AND REFERENCE MATERIAL FOR OTHER SYSTEMS USED IN NAEP ASSESSMENT

#### Westat Systems:

Hours Tracking System  
Materials Ordering System

#### E-Mail:

IceWarp  
Outlook Express User Guide  
Outlook Express Quick Guide

#### Reference Material:

Creating Business Cards  
Is Your Laptop Clock Right?  
NAEP Field Operating System (Data Transmission & Anti-Virus Update)  
Using the SCS to Create Your Own School Logs  
Using the Various Dial-Up Connections

#### Pearson Systems:

NAEP 2007 Pearson SchoolHouse Materials Order System & Materials Tracking  
System

# WESTAT SYSTEMS

- Hours Tracking System
- Materials Ordering System

**NAEP 2007/2008**

**HOURS TRACKING SYSTEM (HTS)  
SUPERVISOR'S USER GUIDE**

November 2007



## Purpose of the Hours Tracking System

The Hours Tracking System (HTS) is a system designed to perform three functions. The first function is to provide the Home Office, Field Directors, and Field Managers a tool to monitor hourly staff hours in order to more effectively assign troubleshooters to help ease the burden on heavily worked teams.

Second, the HTS provides supervisory staff with a specific time to review their hourly staff's timesheets. This is important because improperly filled out timesheets that are not caught and corrected in the field must be fixed by the Field Room before field staff can be paid. Due to a number of issues including transit time, communications with payroll, a communicating with the affected field staff, this can delay payment to hourly staff, a situation that should be avoided if at all possible.

Finally, the HTS allows some unintentional mistakes to be caught quickly. In the past, field staff would occasionally submit a timesheet for a given week twice by accident. There was no way of catching this oversight until the end of the field period, at which point wages paid in excess of time worked would have to be recouped, a situation Westat would like to avoid in the future.

## Overview

The HTS has been streamlined to improve it both the ease and speed of use.

	First Name:	Last Name:	WINS # :	Role: ⬇	Week Ending:	Regular Hours:	Overtime Hours:	Total Hours:
1.	EVELYN	YOVIK	1048654	AA	7/22/2007			0
2.	MARGARET	YEOMANS	1285709	AA	7/22/2007			0
3.	RICHARD	YOUNG	1264900	AA	7/22/2007			0
4.	VICKI	YOUNG	1216071	AA	7/22/2007			0

The most important elements of the data entry page are the Desired Week drop-down box, the Regular Hours and Overtime Hours data entry boxes, and the Save button. A simple checklist will guide you through entering field staff hours:

- Select the desired week (if different than the current week) and wait for the page to switch to the desired week. During periods of heavy use by field staff, this could take up to five seconds on a dial-up connection, but will typically be only a second.
- Enter both the regular hours and overtime hours for a specific hourly staff member. Repeat for as many staff as you have completed time sheets for that specific week.
- Click on the 'Save' button.

Once you have entered the regular and overtime hours for all field staff for a week in your jurisdiction, you have completed your HTS responsibilities for that week.

### **Things to Know**

1. The HTS does have some limited data validation. However, because of the changing nature of overtime laws across the county, it is possible that these validation checks will prevent the system from accepting valid hours. In these very limited cases, e-mail your Field Manager and CC the NAEP Help Desk. After verifying the information your FM can enter the hours into the HTS. CCing the NAEP Help Desk helps guarantee the Home Office staff responsible for the systems are made aware of the circumstances and can see if something can be done in the future to improve the system.

### **Frequently Asked Questions (FAQs)**

Q. I change the week but nothing happens!

A. All NAEP systems are designed to work on Internet Explorer 6.0. The programming team is looking into making the system function on other browsers (such as Safari or FireFox) but due to the internet browser cold war going on between Microsoft and other companies, some programming cannot be made universal. E-mail the NAEP Help Desk if you run into this problem so there are specific examples of what is not functional on non-IE 6.0 browsers is gathered for the programming team. This will improve the chances that in the future the feature in question will work on multiple browsers.

Until then, the HTS will work on your NAEP laptop.

Q. I don't see Jane Doe, but I should!

A. Contact your Field Manager to make sure Jane Doe is either:

- a. Set to at least Hired Key Forms; and/or
- b. Correctly assigned to your Region.

If Jane Doe is at Hired Key Forms or above and assigned to the correct Territory-Region-Area, send an e-mail to the NAEP Help Desk with the staff member's name, WINS, where they should appear and where they are mistakenly appearing.

8/20/2007

**NAEP 2007/2008**

**USING**

**THE WESTAT MATERIALS ORDERING SYSTEM**

November 2007

8/20/2007

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## **Section 1 - Overview and Key Concepts**

### **Section 1.1 - Purpose**

The Westat Materials Ordering System (MOS) is designed to provide a means for field staff to quickly order the materials required to complete the current phase of the NAEP Assessment. This ranges from ordering staff recruitment material or school recruitment material to ordering materials for the Preassessment Visit or the day of the assessment.

If you encounter a problem or need assistance with the Westat MOS, contact the NAEP HelpDesk at 1-800-499-6237 or [naepstaff@westat.com](mailto:naepstaff@westat.com).

### **Section 1.2 - Key Concepts**

#### Office Supplies

The MOS carries a limited number of office items, almost all of which are connected to equipment Westat distributes. These items included ink and toner cartridges for printers, business card paper, and FedEx shipping materials. See pages 7.83 and 7.84 in the LTT-Supervisor's Manual for details on purchasing basic office supplies, if necessary.

#### Backorders

The MOS will *automatically create back orders for unshipped materials, eliminating the need for staff to reorder materials not received*. E-mails will be sent to users when only part of a shipment is sent and will indicate what has been moved into a new backorder.

#### Estimated Yearly Usage and Under Review

Most items in the MOS do not have a maximum amount of that can be ordered. However, there are some items that are either costly to produce (which limits the number ordered), or time consuming to replace. These items have Estimated Yearly Usage guidelines to ensure that all field staff have access to items with limited quantities in a timely manner. Staff can order quantities up to the amount indicated without any review as it is planned staff will use up to that amount.

The Estimated Yearly Usage is a guideline however, and in some cases it will be too low for some field staff's needs. Quantities ordered beyond this guideline will be placed under review.

The review process, if the reason for the request is made clearly in the Special Instructions box, should take only a few minutes and the order should go out the same day in almost all cases. Clearly explained need in the special instructions box is the most effective way to minimize the time under review.

## Multiple Projects

A few field staff will work multiple projects due to location or timing purposes. These staff will see at least two project options when they access the MOS.

The screenshot shows the top section of the Westat Material Ordering System. On the left is the NAEP logo (National Assessment of Educational Progress). The main title is "Westat Material Ordering System". On the right, it says "Welcome Jane Supervisor Westat (State Supervisors) 8/14/2007 10:53:00 AM". Below this is a white navigation bar with "NAEP OPERATIONS" in red, and two links: "Field Test" and "Science Interactive Computer Testing".

A few notes:

- Items may be available for only one project – and will only show up when looking at the material list for that project;
- Items ordered for one project do not count toward the limits or quantities ordered for other projects. In other words, a staff member working multiple projects may have ordered 10 widgets for project A, but as far as project B is concerned the staff member hasn't ordered any.
- Charge codes are different for different projects. It is therefore very important that field staff only order materials for the project the materials will be used for.

## Navigation

The header at the top of the screen contains:

1. A link back to the MyNAEP Options page via the logo in the top left;
2. A link to the list of materials;
3. A link to the shopping cart, even if empty;
4. A link to information on previous orders;
5. Text, in orange, indicating which project the user is viewing materials for (especially useful for staff with multiple projects); and
6. For staff with access to multiple projects, a link to the MOS project selection page.

This is an annotated version of the screenshot above. Red circles with numbers 1 through 6 point to specific elements: 1 points to the NAEP logo; 2 points to the "Materials List" link; 3 points to the "Shopping Cart" link; 4 points to the "Tracking" link; 5 points to the "NAEP-2008/FT" text; and 6 points to the "Main MOS Menu" link.

## Section 2 - Materials List Page

### Section 2.1 - Materials List Page Overview

The Materials List page allows the user to sub-sort materials by category or by name, search for products; add products to the cart without checking out, view item information, and enter the quantities desired for a specific material.

The screenshot shows the Materials List page interface. At the top, there is a 'Categories' dropdown menu set to 'All Categories', a 'Product Search' field with a 'Go' button, and a 'Checkout' button. Below this is a row of alpha tabs from A to Z, with an asterisk on the left, and 'Save' and 'Clear All' buttons. A message reads: 'Please enter the quantity you wish to order. When you have identified all of the materials, please click 'Checkout''. The main table has the following structure:

Category	Item Name	Quantity	Unit Size	Est. Yearly Usage
<b>ASSESSMENTS</b>				
	Certificate of Volunteer Service, 12th grade,	<input type="text" value="0"/>	Bundle(s) of 30	10
<b>GAINING COOPERATION</b>				
	Banana Splits	<input type="text" value="0"/>	Item(s)	25
	Data Collection Form - Diocese	<input type="text" value="0"/>	Item(s)	-
	NAEP Folder 2008	<input type="text" value="0"/>	Item(s)	10

A note at the bottom of the table reads: 'Note: Please keep orders limited until after the 6-23-07 bulk shipment.'

### Section 2.2 - Sub-Sorting

There are three methods to sub-sort the list of materials: using the category drop-down box; searching for a product; and using the alpha-tabs.

This partial screenshot shows the top navigation elements of the Materials List page: a 'Categories' dropdown menu set to 'All Categories', a 'Product Search' field with a 'Go' button, and a row of alpha tabs from A to Z, with an asterisk on the left.

#### Category Dropdown Box

The category dropdown box allows the user to select only a single category of items to view. This is useful when the list of items becomes very long. To return to the full list of items, select 'All Categories'.

#### Product Search

The product search field allows the user to perform a wildcard search. This means the user can enter any part of the name of the product, click 'Go', and all items with that combination of letters or words in the name will appear. For example, if the user searches for 'NAEP', all items, whether they begin, contain, or end with NAEP, will be displayed.

To return to the full list of items, the user can click on the 'Materials List' link in the header, or click on the asterisk on the left side of the alpha tabs.

Alpha Tabs

The alpha tabs allow the user to sub-sort the list of items by first letter of the first word in the item name. For example, clicking on the letter ‘F’ will show only products that have ‘F’ as the first letter in the first word of the item name (mostly FedEx materials).

To return to the full list of items, click on the asterisk on the left side of the alpha tabs.

**Section 2.3 - Order Buttons**

The three buttons located in the top right of the screen (shown on the right) will add or remove items from your cart, and begin the checkout process.



Checkout – This button begins the checkout procedure with any indicated quantity of items. For example if you had entered 5 in the box next to *NAEP Folder 2008*, when you reached the next step of the checkout process, the system would indicate you are ordering 5 *NAEP Folders 2008*.

Save - This button adds items to your cart, but does not begin the checkout procedure. This is very useful for when users sub-sort the items in the material list and would like to add an item to their shopping cart before performing another sub-sort or search.

Clear All – This button empties your shopping cart of all contents, including any saved items.

**Section 2.4 - Material List Columns**

There are 5 columns used to display information about each item.

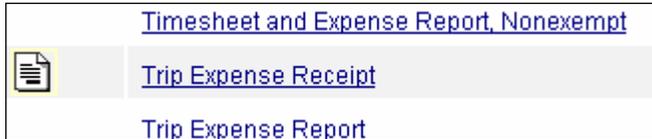
Category	Item Name	Quantity	Unit Size	Est. Yearly Usage
<b>ASSESSMENTS</b>				
	<a href="#">Certificate of Volunteer Service, 12th grade.</a>	<input type="text" value="0"/>	Bundle(s) of 30	10
<b>GAINING COOPERATION</b>				
	<a href="#">Banana Splits</a>	<input type="text" value="0"/>	Item(s)	25
	<a href="#">Data Collection Form - Diocese</a>	<input type="text" value="0"/>	Item(s)	-
	<a href="#">NAEP Folder 2008</a>	<input type="text" value="0"/>	Item(s)	10
<i>Note: Please keep orders limited until after the 8-23-07 bulk shipment.</i>				

1. The Category column lists the category grouping (e.g. ASSESSMENTS) and indicates if the item is downloadable or not (by clicking on the icon of the file such as the one next to *Data Collection Form – Diocese* in the image above).
2. The Item Name column shows the name of the item (the first letter is used in alpha sorts) and allows the user to click on the item name to open up a pop-up window displaying more information about the item.
3. The Quantity column is used to indicate how many individual items or bundles (indicated by the next column) the user wishes to order.
4. The Unit Size column indicates the grouping of the item. Most items are ordered as single items. In the image on the previous page if 5 *NAEP Folders 2008* were ordered, 5 would be sent.

However if 5 bundles of *Certificate of Volunteer Service, 12<sup>th</sup> Grade* were ordered, 150 total certificates would be sent because the certificates are ordered by bundles of 30.

5. The Est. Yearly Usage column indicates how many items or bundles can be ordered before additional orders are flagged for review. In the image on the previous page, staff can order 10 bundles of certificates without any review, but all quantities ordered past 10, during the entire NAEP cycle, will be flagged for review. The *Data Collection Form – Diocese* has no estimated usage and thus field staff can order as many of these items as needed without triggering the review process.

## Section 2.5 - Downloading Files



Some materials exist as electronic files in addition to, or instead of, physical items. These items, like the *Trip Expense Receipt* shown on the left, can be downloaded by clicking on the icon of the paper

with the folded corner. Save all documents to your MyDocuments folder.

A few rare items, such as the Excel Fundamentals Guide, exist only as electronic documents and physical versions should not be ordered. If a physical copy is ordered, the NAEP Warehouse will send any physical items in the order but will be forced to cancel that part of the order. A message

## Section 3 - Shopping Cart

### Section 3.1 – Shopping Cart Overview

The purpose of the shopping cart is to display how many of what items will be sent to which person at what location. The shopping cart allows the user to enter a temporary address (such as to a hotel), add instructions (such as a specified arrival date), change quantities, or remove items from the shipment.

### Section 3.2 – Shipping Information

Name:	<input type="text" value="Jane Supervisor"/>
Mailing Address :	<input type="text" value="1650 Research Blvd"/> <input type="text"/> <input type="text"/>
City/State/ZIP:	<input type="text" value="Rockville"/> <input type="text" value="MD"/> <input type="text" value="20850"/>
Country:	<input type="text"/>
Daytime Phone:	<input type="text" value="301-251-1500"/>
Email Address:	<input type="text" value="naep0025@naepmail.westat.com"/>
Shipping Method:	<input type="text" value="FedEx 2-day"/> <input type="button" value="v"/>
Special Instructions: (500 character limit)	<input type="text"/>

Most of the shipping information will be filled automatically from the information on file. The user must manually change the information if the shipment should go somewhere other than the street address on file.

**\*Note\*** Changing the address information here does not change the address information on file for the user, nor is it retained for future shipments.

If the shipment contains a request for quantities exceeding the Estimated Yearly Usage then the user must

enter the reason in the Special Instructions box, otherwise the system will not allow the order to be submitted. Additionally, if the user would like the shipment to arrive on a specific day, the information must be entered in the Special Instructions box.

**Section 3.3 – Item Shipment Information**

Delete		Save Quantity				
Delete	Quantity	Unit Size	Item Name	Qty Ordered to Date	Est. Yearly Usage	
<input type="checkbox"/>	20	Item(s)	<a href="#">FedEx Envelope</a>	40	-	
<input type="checkbox"/>	50	Item(s)	<a href="#">Letterhead, NAEP</a>	0	-	
<input type="checkbox"/>	50	Item(s)	<a href="#">Paper, NAEP Letterhead, 2nd sheet</a>	0	-	
<input checked="" type="checkbox"/>	1	Bundle(s) of 3	<a href="#">Printer, IP-90 - Black Ink Cartridge (BCL15)</a>	7	4	
<input type="checkbox"/>	10	Item(s)	<a href="#">Timesheet and Expense Report, Exempt</a>	0	-	

Removing an Item

To remove an item from the cart in the shopping cart page, place a check in the box in the ‘Delete’ column, then click on the Delete button above the column.

Change Quantity

To make a quantity change, change the number in the ‘Quantity’ column and click the ‘Save Quantity’ button.

Unit Size and Item Name

The Unit Size and Item Name columns operate the same as on the Materials List page.

Qty Ordered to Date and Est. Yearly Usage

The Qty Ordered to Date and Est. Yearly Usage columns let the user know how many items have previously been ordered by the user and for items with an Est. Yearly Usage, what the estimated usage is set at. This allows the user to know how many of each item they have already ordered and if they are reaching or exceeding the Estimated Yearly Usage.

Items Exceeding the Estimated Yearly Usage

To help the user identify items in the order which will exceed the Estimated Yearly Usage, those items, if present, will be highlighted in red.

**Section 3.4 – Order Buttons**



Once the user is satisfied with the shipping information and item information the user can click on the ‘Submit Order’ button to send the order to the NAEP Warehouse to be filled and shipped. If there are additional items that need to be added, the user can click on the ‘Continue Shopping’ button to return to the Materials List page.

## Section 4: Tracking

### Section 4.1 – Tracking Overview

There are two sections to the Tracking area of the MOS. The first shows the user all of the orders the user has placed and the second shows the user how many of each item the user has ordered.

### Section 4.2 – Order Tracking

Order Tracking   <a href="#">Item Tracking</a>				
Current NAEP Assessment Year				
Order ID	Ship Date	Ship Via	Order Tracking	Status
<a href="#">7345</a>		FedEx 2-day		Submitted
<a href="#">7346</a>		FedEx 2-day		Submitted
<a href="#">7347</a>		FedEx 2-day		Under Review

The Order Tracking page shows the user all of their orders, if the orders have been shipped (and the date shipped), what shipping method was used, the tracking number of the shipment (if FedEx), and the status of the order.

Additionally by clicking on the order number the user can open a pop-up window that displays detailed order information, such as special instructions, shipping notes, quantities shipped (if the order has been shipped), and ship to information.

### Section 4.3 – Item Tracking

Order Tracking   <a href="#">Item Tracking</a>						
Current NAEP Assessment Year						
Category	Item Name	Unit Type	Quantity Not yet Shipped	Quantity Shipped	Total Ordered	Est. Yearly Usage
GENERAL SUPPLIES	FedEx Pouch, Domestic	Item(s)	4	0	4	-
GENERAL SUPPLIES	FedEx Envelope	Item(s)	40	0	40	-
GENERAL SUPPLIES	Printer, IP-90 – Black Ink Cartridge (BCI 15)	Bundle(s) of 3	7	0	7	4

The Item Tracking section allows the user to track how many of each item the user has ordered, been sent, is waiting to be sent, and what the Estimated Yearly Usage for the item is (if any).

## Section 5: After the Order

Every successfully placed order generates an e-mail to you indicating the order was placed successfully. Which additional e-mails are received after this order depends on the specifics of each order. Below are brief explanations of the e-mails it is possible to receive.

### Order Reviewed Notification

Once orders that were under review are reviewed, an e-mail is sent to the user indicating the decision made on how many of requested item under review will be sent. It is expected that in most cases there

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will be no change from the initial order. However in some cases there could be changes to the quantity, so it is important for the user to review this e-mail. Orders are only reviewed once, so even if a backorder is created, no additional review will be performed.

#### Order Completely Filled

If all the items in the order are available to be, and are actually sent then an e-mail indicating the order has been shipped with all requested quantities.

#### Order Partially Filled and Backorder Created

If at least some quantity of one item in an order cannot be sent (such as out of stock or other issues) then an e-mail will be sent indicate how many of each item were sent and informing the user of the order number for the automatically created Backorder.

#### Backorder Created Successfully

In addition to the *order partially filled and back order created* e-mail, an e-mail will be sent indicating the specifics of the new backorder. This e-mail is very similar to the initial *order successfully placed* e-mail.

## Exhibit A: E-mails

### A1. E-mail for a Successfully Placed Order

Dear Jane Supervisor,

Your order has been placed successfully. Your order number is: #7346. When the order has been sent you will receive an e-mail which includes tracking information.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	13:42
City/State/Zip:	Rockville, MD 20850	Order Number:	7346
Phone:	301-251-1500		
Special Instruction:			

Item Information:

Item Name:	Units Ordered:	Unit Size:
FedEx Pouch, Domestic	4	Item(s)

Thank you for your order!

Westat Materials Ordering System

### A2. E-mail for a Successfully Placed Order Exceeding Estimated Yearly Usage (Under Review)

Dear Jane Supervisor,

Your order has been placed successfully. Your order number is: #7348. When the order has been sent you will receive an e-mail which includes tracking information.

At least one item in your order exceeds the estimated yearly usage for this assessment cycle and is **under review**. This typically does not delay shipments, but in extremely busy periods or if further review is required this may delay the shipment by one day.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	14:02
City/State/Zip:	Rockville, MD 20850	Order Number:	7348
Phone:	301-251-1500		
Special Instruction:	I travel more than most and use my printer a lot.		

Item Information:

Item Name:	Units Ordered:	Unit Size:
Printer, IP-90 - Black Ink Cartridge (BCI 15)	1	Bundle(s) of 3

Thank you for your order!

Westat Materials Ordering System

**A3. E-mail for a Successfully Placed Order with Possible Insufficient Stock**

Dear Jane Supervisor,

Your order has been placed successfully. Your order number is: #7349. When the order has been sent you will receive an e-mail which includes tracking information.

There may be **insufficient stock** on hand in the warehouse to fulfill at least one item in your order. You do not need to submit a new order. The NAEP Warehouse will fill what is possible and any unshipped quantities will automatically be placed in a new order. The NAEP Warehouse will fill any backorder as soon as additional stock is available.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	14:03
City/State/Zip:	Rockville, MD 20850	Order Number:	7349
Phone:	301-251-1500		
Special Instruction:			

Item Information:

Item Name:	Units Ordered:	Unit Size:
FedEx Envelope	20	Item(s)

Thank you for your order!

Westat Materials Ordering System

**A4. E-mail for a Successfully Placed Order with Inventory Concerns and Exceeding Estimated Yearly Usage (Under Review)**

Dear Jane Supervisor,

Your order has been placed successfully. Your order number is: #7350. When the order has been sent you will receive an e-mail which includes tracking information.

At least one item in your order exceeds the estimated yearly usage for this assessment cycle and is **under review**. This typically does not delay shipments, but in extremely busy periods or if further review is required this may delay the shipment by one day.

There may be **insufficient stock** on hand in the warehouse to fulfill at least one item in your order. You do not need to submit a new order. The NAEP Warehouse will fill what is possible and any unshipped quantities will automatically be placed in a new order. The NAEP Warehouse will fill any backorder as soon as additional stock is available.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	14:04
City/State/Zip:	Rockville, MD 20850	Order Number:	7350
Phone:	301-251-1500		
Special Instruction:	I'm almost done travelling. This should be the last order for ink cartridges.		

Item Information:

Item Name:	Units Ordered:	Unit Size:
FedEx Envelope	20	Item(s)
Printer, IP-90 - Black Ink Cartridge (BCI 15)	1	Bundle(s) of 3

Thank you for your order!

Westat Materials Ordering System

**A5. E-mail for Completed Review**

Dear Jane Supervisor,

Your order # 7348 has been reviewed. The following items were ordered in quantities that exceeded the estimated yearly usage for this NAEP Cycle and the change(s) made (if any) are displayed:

Item Name	Unit Size	Original Units Ordered	Units Changed to
Printer, IP-90 - Black Ink Cartridge (BCI 15)	Bundle(s) of 3	1	3

**Ship Note:**

The order will now be placed in queue to be filled and you will receive an e-mail message when the order has been filled and shipped.

Thank you!

Westat Materials Ordering System

**A6. E-mail for Order Shipped (Complete)**

Dear Jane Supervisor,

Your Order # 7346 has been filled and shipped in its entirety.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	1:42:13 PM
City/State/Zip:	Rockville, MD 20850	Order Number:	7346
Phone:	301-251-1500	Tracking Number:	1234 5678 1234
		Ship Via:	FedEx 2-day

Item Information:

Item Name	Unit Size	Units Ordered	Units Shipped
FedEx Pouch, Domestic	Item(s)	4	4

**Ship Note:**

Thank you!

Westat Materials Ordering System

**A7. E-mail for Order Shipped (Partially and Backorder Created)**

Dear Jane Supervisor,

Order # 7349 could not be filled in its entirety. Listed below are the items and quantities shipped. The remaining item(s) have been placed onto Backorder # 8001.

Order Information:

Name:	Jane Supervisor	Order date:	8/14/2007
Address:	1650 Research Blvd	Order time:	2:03:09 PM
City/State/Zip:	Rockville, MD 20850	Order Number:	7349
Phone:	301-251-1500	Tracking Number:	1234 5678 9123
		Ship Via:	FedEx 2-day

Item Information:

Item Name	Unit Size	Units Ordered	Units Shipped
FedEx Envelope	Item(s)	20	10

**Ship Note:**

Thank you!

Westat Materials Ordering System

**A8. E-mail for Order Cancelled/Placed on Hold**

Dear Jane Supervisor,

Order # 7350 has been placed On Hold. The reason is: Recieved your e-mail indicating you found extras you already had and wait to see if you need these sent.

The quantities in this order are counted toward the estimated yearly usage for this NAEP cycle.

The Items affected are:

Item Name	Unit Size	Units Ordered
FedEx Envelope	Item(s)	20
Printer, IP-90 - Black Ink Cartridge (BCI 15)	Bundle(s) of 3	1

Thank you!

Westat Materials Ordering System

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**A9. E-mail for a Backorder Created**

Dear Jane Supervisor,

Your order has been placed successfully. Your order number is 8001. When the order has been sent you will receive an email which includes tracking information.

Order Information:

Name:	Jane Supervisor	Order date:	8/20/2007
Address:	1650 Research Blvd	Order time:	11:02:01 AM
City/State/Zip:	Rockville, MD 20850	Order Number:	8001
Phone:	301-251-1500		

Item Information:

Item Name:	Units Ordered:	Unit Size:
FedEx Envelope	10	Item(s)

Thank you for your order!

Westat Materials Ordering System

**The NAEP 2007/2008 MOS User Guide**

**This is a placeholder for the User Guide.**

# E-MAIL

- IceWarp
- Outlook Express
- Outlook Express Quick Guide

7/27/2007

**NAEP 2007/2008**

**ICEWARP WEBMAIL**

**USER GUIDE**

July 2007



## Introduction

IceWarp WebMail provides NAEP field staff who have a high-speed internet connection on their own computer the ability to access their email remotely from any computer with access to the internet and a compatible browser (e.g. *Internet Explorer*). With a look and feel similar Outlook Express, IceWarp WebMail provides full access to your NAEP emails.

IceWarp WebMail has a spell-checker, the ability to send/receive attachments, an address book, contact list, folder management, the ability to save drafts, and allows you to create custom signatures and aliases.

There are two major differences between IceWarp and Outlook Express. When you access your email messages with IceWarp, your messages are not moved to your computer. They remain on the server at Westat. When you use Outlook Express on your NAEP laptop the messages are moved to your laptop. This means that once you download the e-mail message to your laptop you can no longer view it in IceWarp.

The other very important difference is when you create or reply to a message using IceWarp, a copy is not saved in your IceWarp account on the server. To make sure a copy is saved in your 'sent' folder you must make sure the check box next to "Save copy to" is checked, this is covered in more detail in section 3.5.

Experienced users of IceWarp advise that, if you have a high speed connection on your home computer, you can make good use of IceWarp. Use IceWarp during the day to check, read, and reply to messages. Then, once a day use your laptop and Outlook Express to download your messages so that you have a copy of your messages close at hand.



## Section 1 – Accessing IceWarp

IceWarp is a web-based e-mail portal. This means it is only accessible when connected to the internet and then only through your internet browser. If you use IceWarp on your personal computer it is recommended you bookmark the address because it is fairly unusual. However, when using IceWarp at publicly accessible computers (e.g. internet cafés, libraries, or schools) you should not bookmark IceWarp for security purposes.

To reach the IceWarp WebMail site you need to:

1. Be connected to the internet;
2. Open a web browser;
3. In the address bar of your web browser, replace the default address with:

<https://198.232.250.29:32001/mail>

4. Click on the ‘Go’ button or press enter/return;
5. When the security alert box appears and asks you if you wish to proceed, click ‘yes’.

And you will reach the IceWarp WebMail site.

\*NOTE\* Most web addresses are http://, however secure sites, like IceWarp, use https://. If the ‘s’ is omitted the page will not load.

### Section 1.1 – Logging On

IceWarp uses your NAEP user ID and Password. Enter your NAEP user ID in the “User name :” box and your NAEP password in the “Password :” box.

### Section 1.2 – Pop-ups

IceWarp uses pop-up windows for several key functions, including composing new messages, replying to messages, and creating contacts in your IceWarp address book. As IceWarp is designed for your use on a personal computer, you will need to set your computer’s pop-up protection to allow IceWarp pop-ups. This includes any add-ons you may have (such as Yahoo Toolbar or Google Toolbar), which may also prevent pop-ups.

IceWarp Web Mail

User has been logged out.

User name :

Password :

Encrypted login

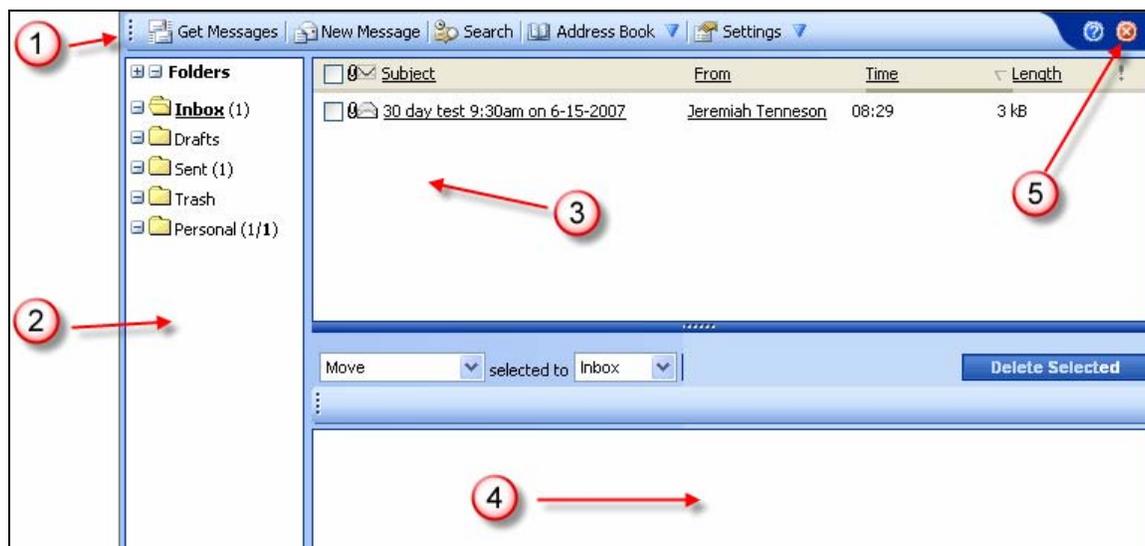
[Forgot your password?](#)  
[Click here for fast login](#)

Powered by [IceWarp Software](#) [Merak Email Server](#)  
IceWarp Web Mail 5.6.7 (Registered)

## Section 2 – Navigating through IceWarp

There are 5 main areas you should be familiar with in IceWarp.

1. The Menu Bar
2. The Folder List
3. The Messages Pane
4. The Preview Pane
5. The Logout button



### Section 2.1 – The Menu Bar



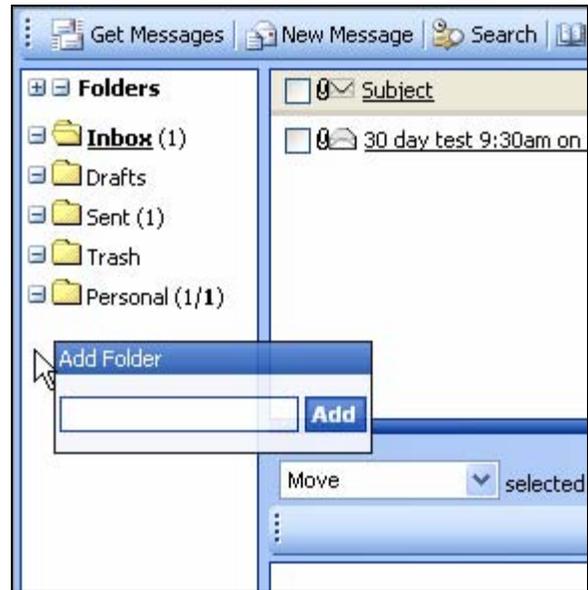
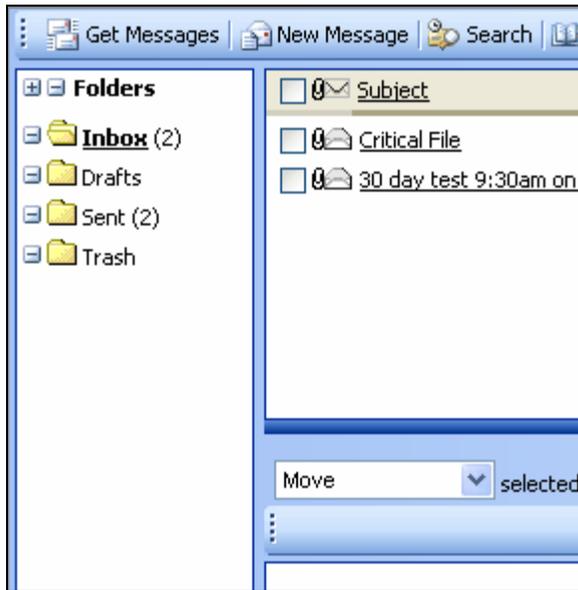
The Menu Bar has 5 options.

1. Get Messages – Checks the server to see if there are any new messages waiting for you (much like the Send/Recv button in Outlook Express).
2. New Message – Opens a pop-up window for you to begin to compose a new message.
3. Search – This feature allows you to search all of the messages in IceWarp for a keyword or phrase.
4. Address Book – Use this feature to new contacts or quickly create a new message addressed to an already created contact.
5. Settings – Modifying your alias and creating a signature are accomplished in the settings area.

## Section 2.2 – The Folder List

The Folder List is very similar to the Folder List in Outlook Express. You click on the name of the folder to move to that folder. To move to the Sent folder, you click on 'Sent'. The page will refresh and the Messages Pane (section 5) will display all the messages saved in the sent folder.

You can also create your own folder by right-clicking in the white space of the Folder List. This will open a small pop-up, as seen in the image below on the right, in which you enter the folder name and then click on the 'Add' button. When completed, the page will refresh and the new folder will be visible.



## Section 2.3 – The Message Pane

<input type="checkbox"/>  Subject	<input type="checkbox"/> From	Time	Length	
<input type="checkbox"/>  <b>The information you requested</b>	<u>Jeremiah Tenneson</u>	15:45	2.83 kB	
<input type="checkbox"/>  Critical File	<Jeremiah>	06.15.07 13:37	26.53 kB	
<input type="checkbox"/>  <b>Another heads up</b>	<u>Jeremiah Tenneson</u>	15:52	1.27 kB	
<input type="checkbox"/>  30 day test 9:30am on 6-15-2007	<u>Jeremiah Tenneson</u>	06.15.07 08:29	3 kB	

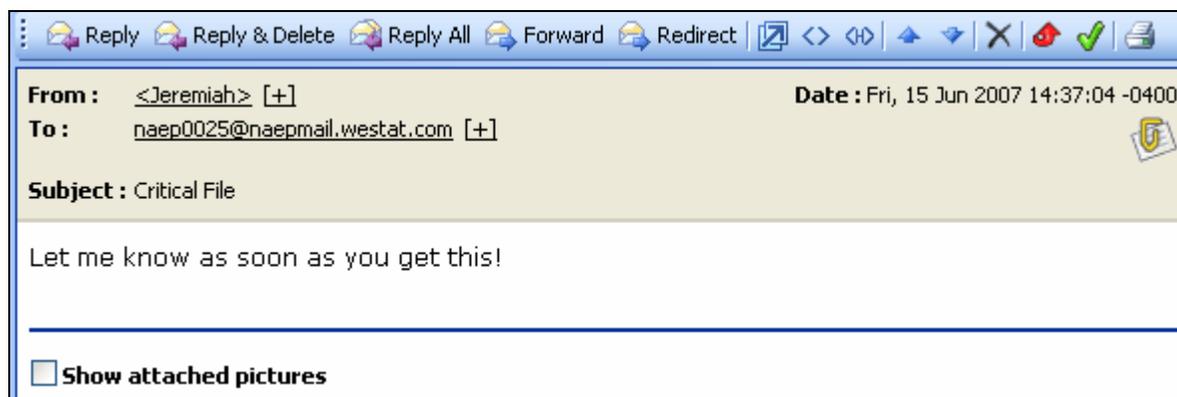
The message pane shows all the messages in the current folder. There are several items to take note of:

- Messages in **bold** with a closed envelope are unread messages.
- Messages with a red **!** are messages the sender believes are critical messages.
- Messages with a paperclip  have an attachment you can download to your computer and open if you have the correct software (be careful downloading attachments, it is always best to scan the files for viruses before opening them).
- You can sort the list of messages by clicking on the name of the column (Subject, From, Time, or Length) or icon at the top of each column (the paperclip, envelope, or exclamation mark). You can alternate between ascending and descending order by clicking on the header of an already sorted column.

*\*Note\** - There are two types of e-mails – ‘plain text’ and ‘html’. IceWarp shows all html e-mails as having attachments. Another way to check to see if a message has an attachment is to look at the messages’ ‘length’. Messages that are larger than about 15.00 kB are likely to have attachments. Most e-mails that are only text are under 15.00 kB.

## Section 2.4 – The Preview Pane

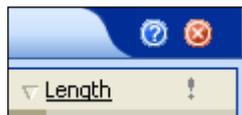
The Preview Pane allows the message to be viewed, attachments to be saved, and replies to be created.



At the top of the Preview Pane are a series of buttons and icons. Only the icons you will normally use will be covered:

-  - Just as in Outlook Express, this button will create a reply to the original sender. The reply will open in a new window.
-  - Just as in Outlook Express, this button will create a reply to the original sender, the 'To:' recipients, and any 'CC:' recipients. The reply to all will open in a new window.
-  - Just as in Outlook Express, this button will forward an exact copy of this message, plus anything you choose to add, to a recipient you must add (the To: line is blank to start). The forwarded message will open in a new window.
-  - The 'Enlarge Mail' button will open the current message in a new pop-up window.
-  - The 'Previous' (arrow facing up) and 'Next' (arrow facing down) move you to the previous or next message (up the list or down the list).
-  - The black X moves the current message into your Trash folder.
-  - The print button should only be used if there is a printer attached to the computer you are using (otherwise an error message will occur) and will open a modified version of the message in a new window to make printing easier. It will also open up the print options automatically. It functions nearly the same as File -> Print.

## Section 2.5 – Logging Off



For security reasons, when exiting IceWarp the small red circle with an X through it in the upper right-hand corner should be clicked once. Then after the login screen appears the web browser should be closed completely. This will help guarantee that no one can access your IceWarp account after you have logged off.

## Section 3 – Creating Messages

If you click on the New Message button (section 2.1), the Reply, the Reply All, or the Forward buttons (section 2.4) a pop-up window will appear with all the basic features used to create a new message plus a few specific to a web-based mail program. These features will be discussed further but first, here is an example of a new message.

The screenshot shows the 'Write Message' interface in IceWarp Web Mail. The window title is 'IceWarp Web Mail (naep0025) - Write Message - Microsoft Internet Explorer'. The interface includes a header with buttons for 'Send Message', 'Save to drafts', and 'Spell Checker', and a 'Priority' dropdown set to 'Normal'. The 'From' field is populated with 'naep0025 <naep0025@naepmail.westat.com>'. There are empty fields for 'To:', 'Cc:', and 'Bcc:'. The 'Subject' field is also empty. Below these fields is a large text area for the message body. At the bottom, there are checkboxes for 'HTML message', 'Encrypt', and 'Sign'. A second set of 'Send Message', 'Save to drafts', and 'Spell Checker' buttons is located below the text area. At the very bottom, there is a 'Save copy to' dropdown set to 'Sent' folder, a 'Read confirmation' checkbox, and a 'Browse...' button.

### Section 3.1 – Message Buttons

Below are descriptions of each of the buttons used when creating new messages or replying to a received message:

- **Send Message** – After completing the message this button is used to send the message to the intended recipients.
- **Save to drafts** – If a message is not ready to be sent and there is not time to finish the message before you need to leave, then clicking on the Save to drafts button will save a copy of the message in the drafts folder so you can return to it later to finish it.
- **Spell Checker** – Spell checks (but does not grammar check) the message.
- **To:** - Opens up the address book and allows contacts to be selected.
- **Cc:** - Opens up the address book and allows contacts to be selected.
- **Bcc:** - Opens up the address book and allows contacts to be selected.

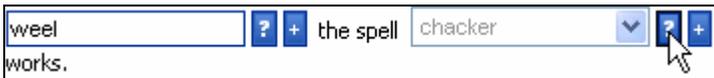
### Section 3.2 – Selecting Your Alias

IceWarp allows users to create their own alias, which is discussed in more detail in section 6.1. To use an alias that has been created click on the drop-down box next your NAEP e-mail address and select the alias desired.



### Section 3.3 – Spell Checker

When the Spell Checker button is clicked it will open a new pop-up window with only the text in the body of the message. Words not in IceWarp’s dictionary will appear with box around them.



If the word has a box without a drop-down arrow around it (“weel” in the example above) then the word is directly editable. This is the default. However, if a list of possible alternative words to choose from is desired, then left-click on the box with a question mark (“chacker” in the example above). This changes the box to a box with a drop-down arrow. By left-clicking on the drop-down arrow once, a list of possible alternatives is displayed. Selecting the desired word will automatically replace the misspelled word.

Finally, if the user wishes to add a word (NAEP for example) to the users’ IceWarp dictionary, simply click on the button with a plus sign just to the right of the button with a question mark. This will add the word to the user’s IceWarp dictionary.

### Section 3.4 – Adding Attachments

IceWarp allows you to add attachments to your messages. Click on the Browse... button. This will open up a box that allows you to locate the file you wish to add. After you have located the file, click ‘Open’.



A box will appear displaying the attempt to attached the file to the e-mail.



After successfully attaching the file(s) you will see the filename(s) in the white box to the left of the “Browse...” button.



If multiple attachments are added, each file name will appear, separated by a comma.

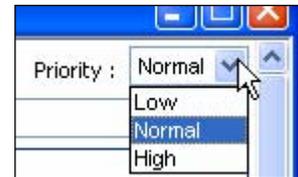
### Section 3.5 – Sent Message Goodies



IceWarp has the ability to save a copy of a sent message in the Sent folder. This will happen if there is a checkmark (default) in the box next to ‘Save copy to’. You can manually change the location of where a copy will be saved by selecting a different folder from the drop down menu.

Additionally there is a checkbox for ‘Read confirmation’. If you check the box, you will receive a message telling you when the e-mail you sent was viewed by the intended recipient(s). This can be a useful tool to see if someone is receiving your messages. It is important to note however that the recipient may have only skimmed the message and not read it in detail, but you will know that they did receive it.

You can also indicate the priority of message by changing the value in the Priority box in the upper right of the pop-up window. The default is Normal, but you can change this to High by selecting High from the drop-down box. If you select High, then the recipient will see a red ! next to the message informing the recipient that this is a very important message.



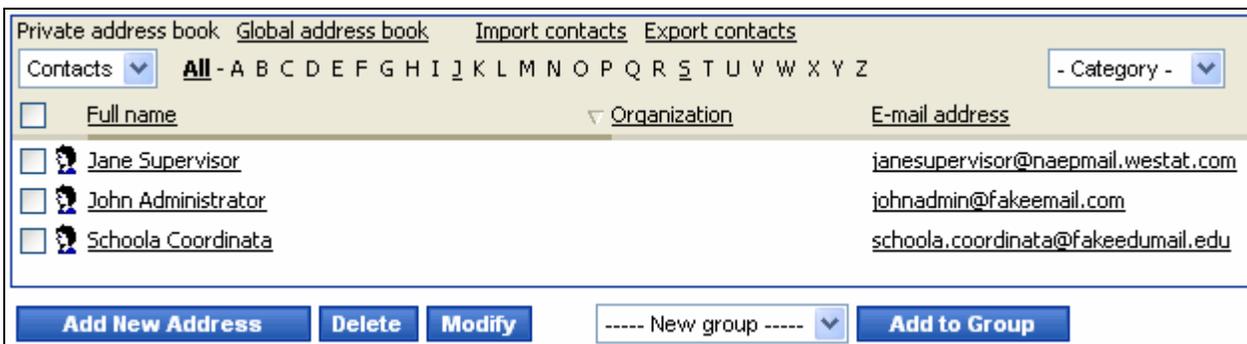
The Sign checkbox is the last goody. If a custom signature is created (section 6.2) it can be displayed by checking the box next to Sign. Using a signature is a good way to distribute contact information and gives the message a professional look and feel.



### Section 4 – Contacts and Address Books

The Address Book is reached via the Address Book button on the main screen, or by clicking on the To:, Cc:, or Bcc: buttons inside a message.

Initially the address book will be empty and you will have to manually enter or add your contacts to the address book. However, once your address book is filled, it will become a valuable and time-saving tool. Creating contacts will allow you to add recipients, whether as the To:, Cc:, or Bcc, quickly and without worrying each time about whether or not you typed the e-mail address correctly.

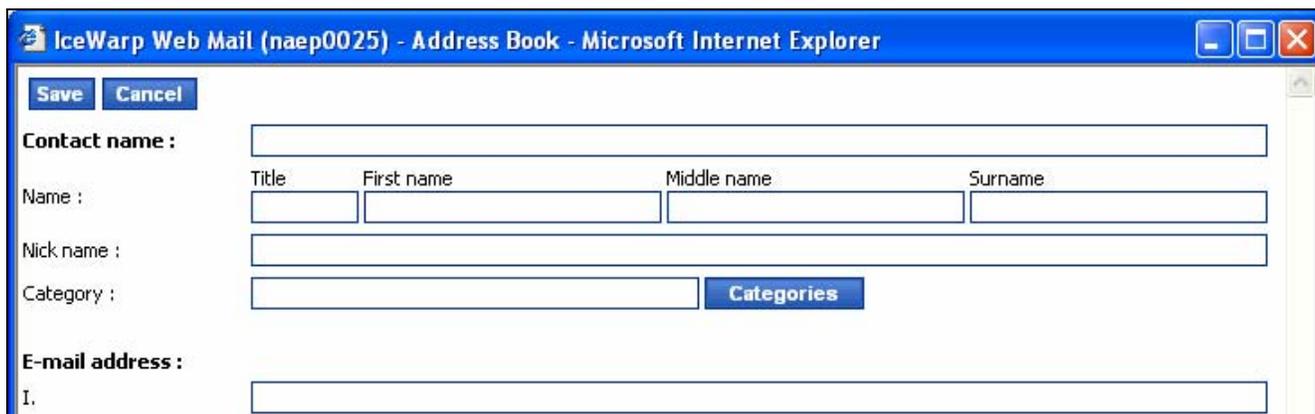


## Section 4.1 – Creating Contacts

There are two methods for adding contacts. Either creating a contact from scratch by going to the address book and clicking on the button titled ‘Add New Address’ or by clicking on the plus sign in brackets next to the sender’s or recipients’ names in a message.

**From :** <Jeremiah> [+]  
**To :** naep0025@naepmail.westat.com [+]

When creating a contact you need to fill in at least the Contact Name and one e-mail address. IceWarp will allow an incomplete contact to be saved but the contact will not be useful unless a contact name and e-mail address have been entered.



The screenshot shows the 'IceWarp Web Mail (naep0025) - Address Book' window. It contains a form with the following fields and buttons:

- Save** and **Cancel** buttons at the top left.
- Contact name :** A single-line text input field.
- Name :** A form with four sub-fields: **Title**, **First name**, **Middle name**, and **Surname**.
- Nick name :** A single-line text input field.
- Category :** A dropdown menu with a **Categories** button next to it.
- E-mail address :** A single-line text input field with a small 'i.' icon to its left.

## Section 4.2 – Using Contacts

There are two methods of using contacts. You can either open your address book and click on the e-mail address of that contact or you can click on the To:, Cc:, or Bcc: buttons in a new, a reply, or a forwarded message.

If you click on the To:, Cc:, or Bcc: button the following pop-up box appears:



The screenshot shows a pop-up box for selecting contacts. It includes the following elements:

- Navigation links: **Private address book**, **Global address book**, **Import contacts**, and **Export contacts**.
- Dropdown menu: **Contacts**.
- Filter: **All** - A B C D E F G H I J K L M N O P Q R S T U V W X Y Z.
- Category: **- Category -** (dropdown).
- Table with columns: **To**, **Cc**, **Bcc**, **Full name**, **Organization**, and **E-mail address**.
- Table rows:
  - Jane Supervisor | janesupervisor@naepmail.westat.com
  - John Administrator | johnadmin@fakeemail.com
  - No-name |
  - School Coordinator | schoola.coordinata@fakeedumail.edu
- Buttons: **Insert Contacts & Close**, **Insert Contacts**, **Add New Address**, **Delete**, **Modify**, **----- New group -----** (dropdown), and **Add to Group**.

Select the box in the appropriate column next to the contact you wish to include as a recipient of the message (the first column of check boxes is for To: recipient, the second for Cc: recipients and the column of checkboxes furthest to the right is for Bcc: recipients). After you have selected the boxes you wish, for example:

To	Cc	Bcc	Full name	Organization	E-mail address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jane Supervisor		janesupervisor@naepmail.westat.com
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	John Administrator		johnadmin@fakeemail.com
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	No-name		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	School Coordinator		schoola.coordinata@fakeedumail.edu

Click on the Insert Contacts & Close or Insert Contacts button. Insert Contacts & Close will insert those contacts and close the address book, returning you to the message you were working on. Insert Contacts will apply the chosen contacts to your message but will not close the address book. You will need to close the address book manually to return to the message you were working on.

## Section 5 – Searching Messages

One of the buttons identified in section 2.1 is the Search button which opens a pop-up window that allows you to search the messages in IceWarp in a number of different ways.



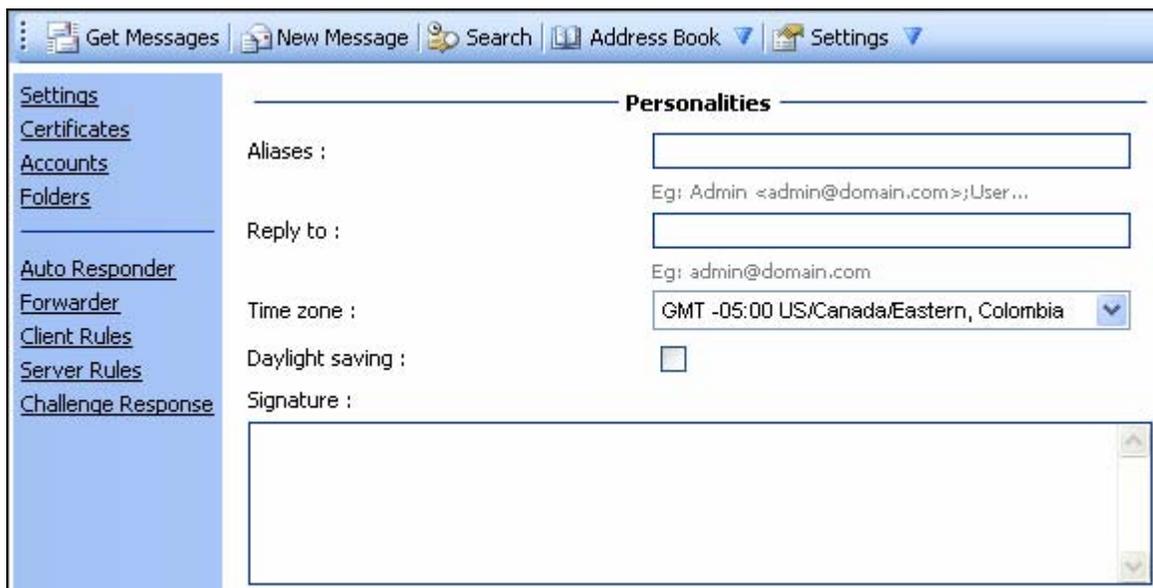
The text to be searched for is entered in the box to the left of Search button. Then the user selects the folder (defaults to all) to search and the area in the message to search (Subject is the default, other options include 'From', 'To/Cc', and 'Body'). Results will be displayed as:



Clicking on the subject of the e-mail will not open the e-mail, instead it will switch folders, select the chosen message, and display the contents of the chosen message in the Preview Pane. The user can then close the pop-up box and access the message.

## Section 6 – Settings

In the Settings areas there are two features that users may find very useful. The first is creating an alias (so instead of the recipients receiving a message from naep0025@naepmail.westat.com they receive a message from JaneSupervisor@naepmail.westat.com). The second is creating a signature to add to messages.



### Section 6.1 - Aliases

By default Icewarp uses your base NAEPmail e-mail address which is your User ID (e.g. naep0025@naepmail.westat.com). To create an alias that is more personal you need to type in your name as you would like it to be displayed (e.g. “Jane Supervisor”) followed by your naepmail account in greater than and less than signs. Your final alias should look something like this:

“Jane Supervisor” <naep9999@naepmail.westat.com>

See section 3.2 to see how to use your Aliases.

### Section 6.2 – Signature

To create a signature that can be added to a message (see section 3.5) enter the signature in the large box below the text “Signature:”. A sample signature format is:

First-name Last-name  
NAEP Representative  
Phone:

When finished, scroll to the bottom of the page and click on the ‘Save Changes’ button.