AgView Training

**Registration Starter Guide for
Producers, Clinics, and Veterinarians (PCVs)**

Acknowledgements

This training guide was created by the Institute for Infectious Animal Diseases.

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PART I: THE REGISTRATION PAGE

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

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

Registering via mobile app:
Download the agview app from the apple app store or google play store to your mobile device. The app is free to download. Launch the app.
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:

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

Section 2.1: 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.

2. Select CVI as the tool you would like access to.

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.
   Note: A registration email will be sent to the email address entered for the initial administrator. If the email is not received, check any spam filters for an email from accountadmin@agview.com.
6. After the account has been approved by the AgView administrators, another email will be sent from accountadmin@agview.com that includes a password reset link for the initial administrator. After resetting the password, the administrator can login to AgView at agview.com.

Section 2.2: 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. Select CVI as the tool you would like access to.

3. Fill out the organization information section (see page 7 for image).
   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 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.
   Note: A registration email will be sent to the email address entered for the initial administrator. If the email is not received, check any spam filters for an email from accountadmin@agview.com.

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

Section 2.3: 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.

2. Select CVI as the tool you would like access to.

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 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.
   Note: A registration email will be sent to the email address entered for the initial administrator. If the email is not received, check any spam filters for an email from accountadmin@agview.com.
6. After the account has been approved by the AgView administrators, another email will be sent from accountadmin@agview.com that includes a password reset link for the initial administrator. After resetting the password, the administrator can login to AgView at agview.com.

PART III: AGVIEW ACCOUNT SETUP

Upon logging in, the initial administrator will land on the "Dashboard" page.
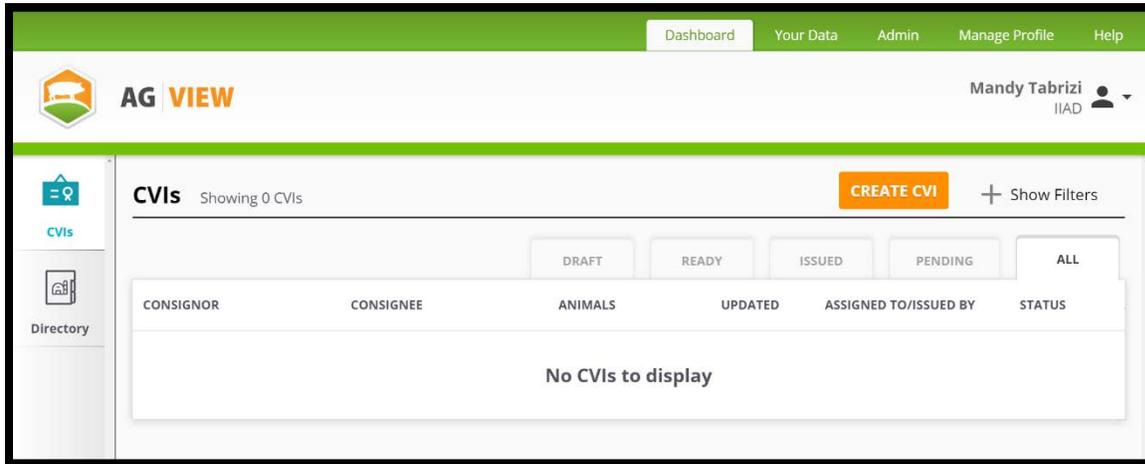
Click on the "Admin" button in the upper right-hand corner to navigate to the Admin Page. On the Admin Page, there is a list of tabs on the left-hand side of the screen:

All Account Users, Standard Users, Veterinarians, Administrators, Operators, Account Settings, Inactive Users.
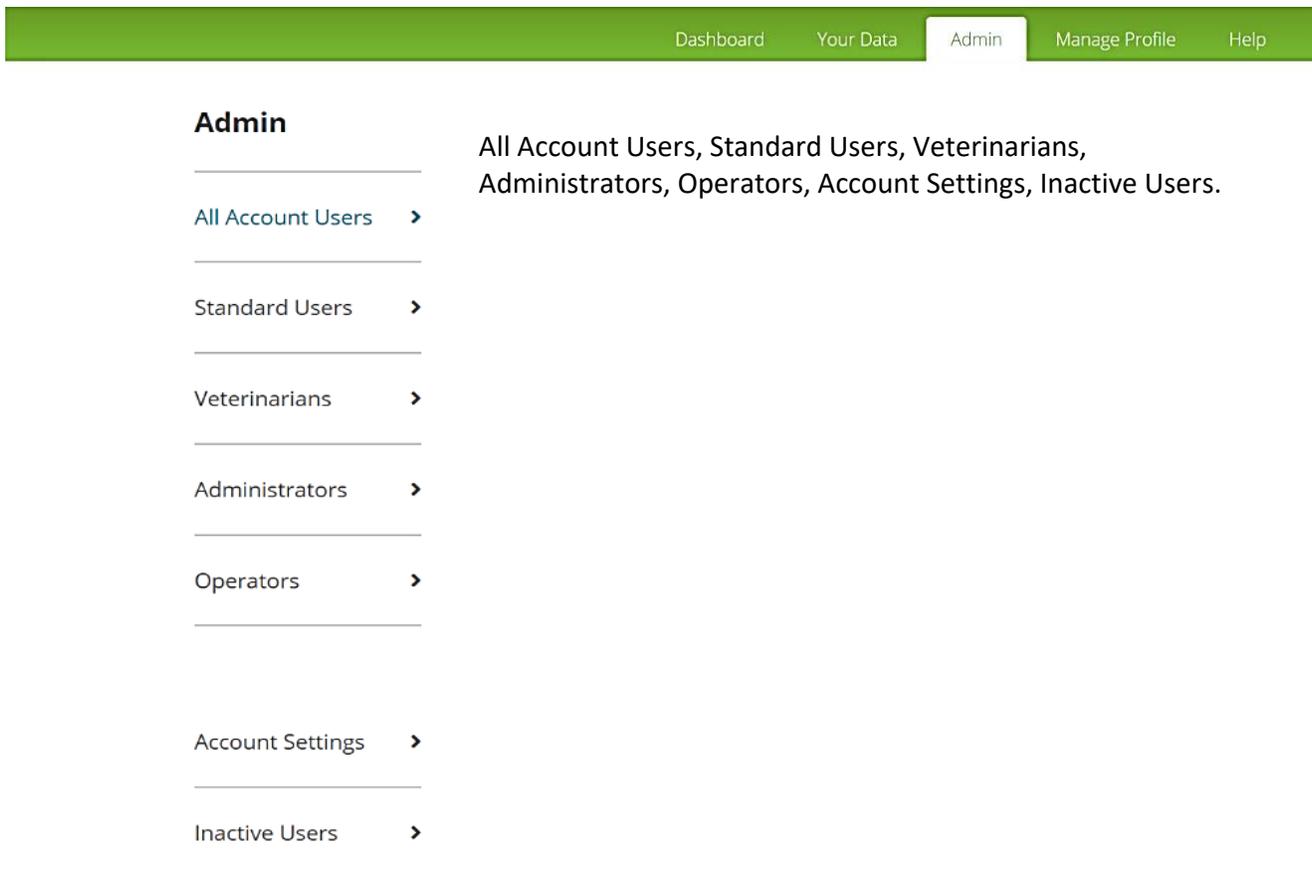
ALL ACCOUNT USERS

List of all users who have accounts under the organizational account.[SC1]

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.

VETERINARIANS

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

ADMINISTRATORS

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

Note: It is recommended that the initial organization admin assign administrator privileges to another user within the organizational account as a backup.

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.

ACCOUNT SETTINGS

Tools Access: This section shows you what tools your organization has been approved to use.

INACTIVE USERS

Provides a list of user 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**.
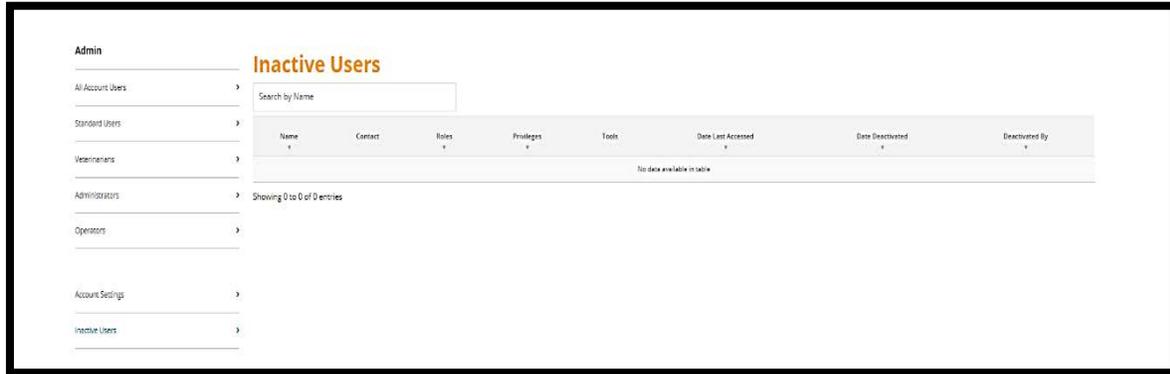
SECTION 3.1: CVI SUBMITTER PRIVILEGE (not listed as a separate category/tab)

Privilege that can be granted to Veterinarian users. Veterinarian users must be granted this privilege before being allowed to use the AgView CVI tool to submit CVIs on behalf of the organization.
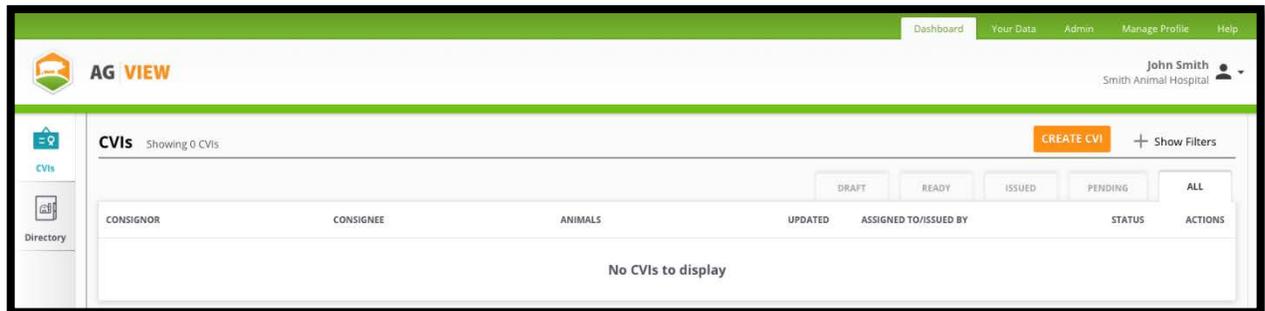
SECTION 3.2: ROLES vs. PRIVILEGES

Roles

> **Standard Users** vs. **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. AgView Support strongly recommends that there are at a minimum two users with administrative privileges.

SECTION 3.3: 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)
1. 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.
2. Under "All Account Users", you should see your name, contact info, roles, etc.
3. Click on your name (will be a clickable link).
4. Click the "Edit" button at the bottom right-hand corner of the page.
5. Click on the "Veterinarian" button.
6. Click the box next to "Allow this Veterinarian to submit CVIs".
7. Enter you 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.

PART IV: CREATING A NEW STANDARD USER

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

From any of the top five tabs (All Account Users, Standard Users, Veterinarians, Administrators, Operators) under the Admin section, you can create a new user.

1. Click on the green "CREATE USER" to the upper right-hand side of the page.

2. Standard user will be the defaulted selection

Standard User	Veterinarian
The standard user 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)	**The veterinarian is responsible for:** • 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 do not have to assign privileges to a user, but it is strongly recommended that there are at a minimum of two users with administrative privileges.

☐ Administrator	**The administrator is responsible for:** • Creating and managing individual entity user accounts • Initiating, modifying, and approving sharing requests • Assigning operator and additional administrator privileges
☐ Operator	**The operator is responsible for:** • Managing entity data uploads • Map entity schema to AgView Schema

4. Select the checkbox next to CVI: Create, View, Edit, Assign to grant the user access to the tool.

Tools Requested *

Access to: ☐ CVI: Create, View, Edit, Assign ⓘ

5. User Lookup. Enter the email address and last name for the new user to see if the user is already registered with another AgView account (see image on page 15).
   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.)

User Lookup

Please use the form below to see if this new user is already registered with another AgView account system.

Email *

Last Name *

LOOKUP

a. If the user already has an account with AgView, you will receive the following confirmation message: Select Yes or No.

Confirmation   X

An account with this email address and attributes already exists in the system. Are you trying to add **Demo Veterinarian** to your organization?

NO   YES

b. If the user you are entering does not already have an account with AgView, you will receive the following message:

This is a new account. Please complete the form below to create this account and add the user to your organization.

6. Fill out the remainder of the "User Information" for the new user being added to your organization account. Click the green "CONTINUE" button.

User Information

User Email *
johndoe@yopmail.com

Verify User Email *

User First Name *   User Middle Name   User Last Name *
                                                         Doe

User Phone *

CANCEL   CONTINUE

7. On the "Verify Create Account User" page, verify your new user information and click the orange "CREATE USER" if everything looks correct or click the gray "PREVIOUS" button to edit any fields (see image on page 16).

Verify Create Account User

Please verify your new user information below and click "Create User" to continue. Click "Previous" to edit any fields.

User Account Type & Permissions:	Standard User
Tools Requested	
Access to:	CVI
User Information	
User Email:	johndoe@yopmail.com
User Name:	John Doe
User Phone:	(555) 555-5555

CANCEL   PREVIOUS   CREATE USER

8. After the new user is successfully created, the system will return to the "All Account Users" page. The new standard user will receive an email from accountadmin@agview.com which prompts them to set a password for their new user account within the organizational account.

PART V: CREATING A NEW VETERINARIAN USER

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

From any of the top five tabs (All Account Users, Standard Users, Veterinarians, Administrators, Operators) under the Admin section, you can create a new user.

1. Click on the green "CREATE USER" to the upper right-hand side of the page.

2. Standard user will be the defaulted selection so you will need to select "Veterinarian"

3. Select any relevant privileges by checking the boxes.
   Note: You do not have to assign privileges to a user, but it is strongly recommended that there are at a minimum of two users with administrative privileges.

4. If the Veterinarian User should be allowed to submit CVIs, check the box next to "CVI: Create, View, Edit, Assign" and check the box next to "CVI Submit (Veterinarians only) **Note**: AgView only allows Veterinarians to submit CVIs that have both USDA accreditation status and state licenses.

5. User Lookup. Enter the email address, last name, and USDA Accreditation Number for the new veterinarian user to see if the user is already registered with another AgView account.

   Note: email addresses can only be used once within an organization (i.e. the same email address cannot be used for both a stand user and a veterinarian).
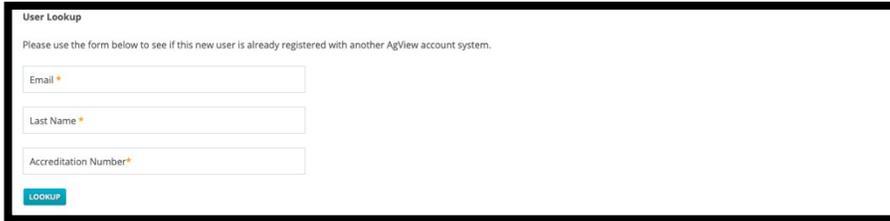
   a. If the veterinarian user already has an account with AgView, you will receive the following confirmation message:

      i. Click "Lookup" and select Yes or No:
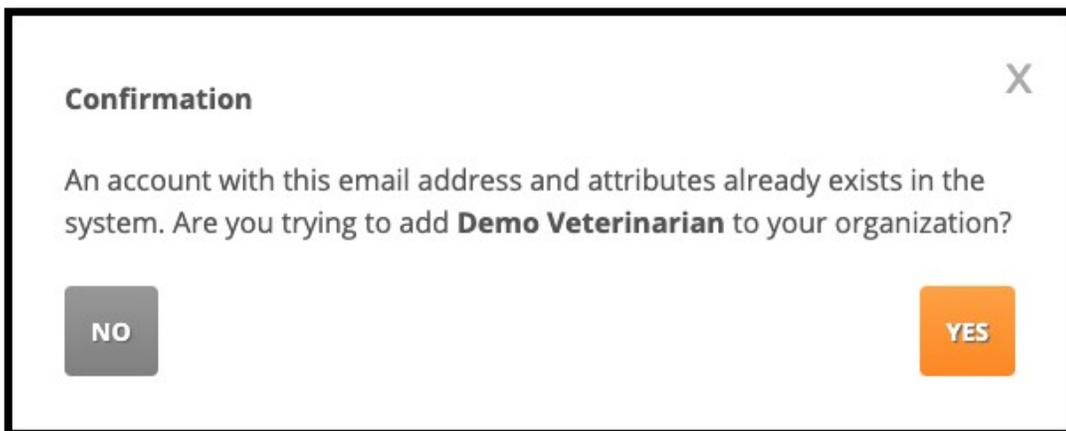
1. If you select "Yes", confirm the veterinarian's information and click the green "Continue" button. Verify the new veterinarian user's information on the "Verify Create Account User" page and orange "Create User" button or click the gray "Previous" button to return to the create Account User Page to edit any fields.
2. If you select "No", the system will return to the User Lookup page to edit any fields.

b. If the veterinarian user does not already has an account with AgView, you will receive the following message:

This is a new account. Please complete the form below to create this account and add the user to your organization.

i. Fill out the remainder of the new Veterinarian User contact information (verify user email, user first name and user phone).
ii. Enter the veterinarian's accreditation type (Category I or Category II) and expiration date.
iii. Click the blue "Add State License" to add one or more state veterinary licenses.
Note: The veterinarian user will have to be approved by the State Animal Health Official's (SAHO) office where he/she is license prior to having signature authority on a CVI. This review process can take up to two business days.

Licenses

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

Issuing State *	License Number *	License Expiration *	
Select ▼		MM/DD/YYYY	REMOVE

ADD STATE LICENSE

iv. Click the green "CONTINUE" button   CONTINUE
v. Review the user's information on the "Verify Account User" page. If everything looks correct, click "CREATE USER". Click "PREVIOUS" to make any needed changes.   PREVIOUS CREATE USER

Success
You have successfully created the user. Please see below for user details. An email confirmation will be sent to you and the relevant user email address shortly.

6. After the new user is successfully created, the system will return to the "All Account Users" page. The new veterinarian user will receive an email from accountadmin@agview.com which prompts them to set a password for their new user account within the organizational account.

   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). Veterinarian users will have to be approved by the State Animal Health Official's office where they are licensed prior to having signature authority on CVIs. This review process can take up to two business days.

PART VI: EDITING USERS

Users can be edited by an organization administrator at any time. The following sections include steps for making various edit types.

Section 4.1: Adding or Removing Privileges and Updating User Information

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).

Doe, Mary	(555) 555-5555 mdoedvm@gmail.com	Veterinarian	Administrator CVI submitter Operator	CVI	Never	07/31/2019	Doe, Jane

2. Click the black "Edit" button at the bottom right-hand corner of the page.
3. Make the necessary edits (e.g., update user information, add or remove privileges).

4. Click the "Update User" button. If the update was successful, you should see a message that says "You have successfully updated this user account".

You have successfully updated this user account.

Section 4.2: 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).

Doe, Mary	(555) 555-5555 mdoedvm@gmail.com	Veterinarian	Administrator CVI submitter Operator	CVI	Never	07/31/2019	Doe, Jane

2. Click the black "EDIT" button at the bottom right-hand corner of the page.
3. Click the red "DEACTIVATE" button at the bottom left-hand corner of the page.
4. Enter a custom message to provide a reason for the deactivation. This message will be emailed to the user.
5. Click "DEACTIVATE" to officially deactivate the account or click "CANCEL" if you change your mind.
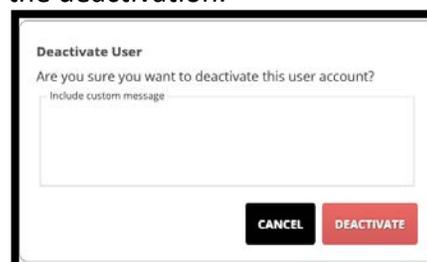
Deactivate User

Are you sure you want to deactivate this user account?

Include custom message

CANCEL   DEACTIVATE

Section 4.3: 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 clickable link).

Inactive Users

Search by Name

Name ▼	Contact	Roles ▼	Privileges ▼	Tools	Date Last Accessed ▼	Date Deactivated ▼	Deactivated By ▼
Doe, Mary	(555) 555-5555 mdoedvm@gmail.com	Veterinarian	CVI submitter Operator Administrator	CVI	Never	07/31/2019	Doe, Jane

1 through 1 of 1 results

2. Click the black "EDIT" button at the bottom right-hand corner of the page.
3. Click the orange "ACTIVATE" button. The user is now reactivated.
4. The user will receive an email letting him/her know the account has been reactivated that includes a password reset link.

Section 4.4 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).

Doe, Mary	(555) 555-5555 mdoedvm@gmail.com	Veterinarian	Administrator CVI submitter Operator	CVI	Never	07/31/2019	Doe, Jane

2. Click the black "Edit" button at the bottom right-hand corner of the page.
3. Uncheck the box next to "Allow this Veterinarian to submit CVIs"

☐ Allow this Veterinarian to submit CVIs

4. Click the orange "Update User" button.
Note: You can always re-grant the CVI Submitter privileges by editing the user and checking the box next to "Allow this Veterinarian to submit CVIs".

PART VII: 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 to all users within the organization.

Section 7.1: Data Upload Page

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

2. There are 3 tabs on the left-hand side of the screen: Data History, Upload Data, Use Core Data Schemas.
   a. 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.
      i. **Note:** Click the "Upload Data" button to navigate quickly to the data upload section
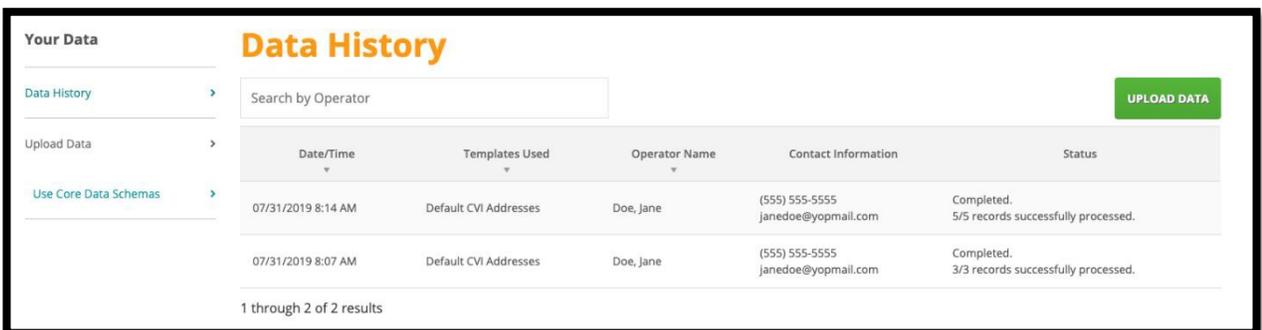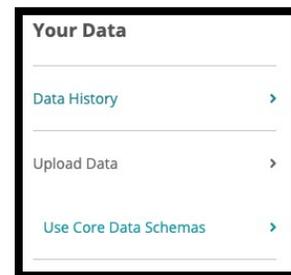
   b. Upload Data: This section is where data is uploaded. Files are uploaded using a template. You will find default templates on the right-hand side of the page.
      i. Note: For CVI addresses, use the "Addresses Schema Template".
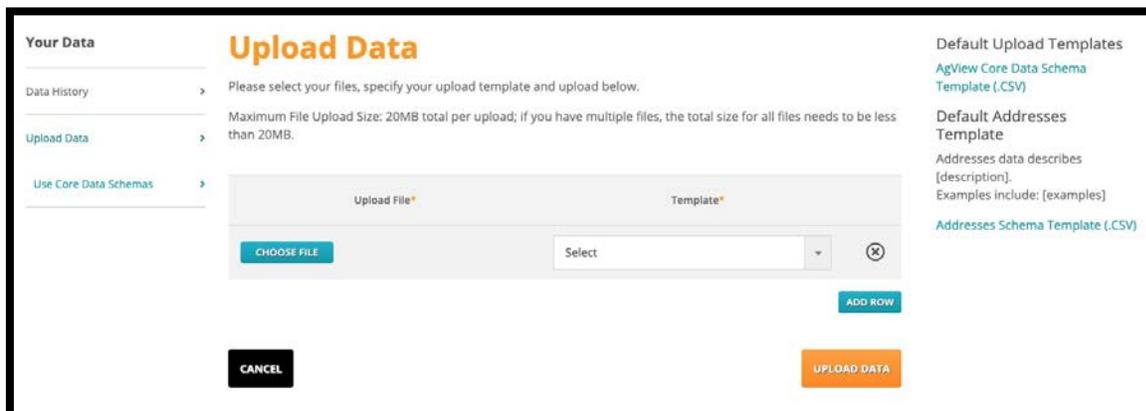
c. Use Core Data Schemas: This section includes templates for uploading data into the system. If you are using AgView for CVIs only, you will only need to use the "Addresses Schema Template".

Section 7.2: Uploading CVI Addresses

Follow the steps below to upload address data (i.e. consignor and consignee lcocations) 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.

1. In order to upload CVI addresses, the data will need to be in the correct format (.CSV file) and template. Download the "Addresses Schema Template" (link available on the right-hand side of the page).
2. Navigate to the "Upload Data" section
3. Click the "Choose File" button and select the .CSV file.
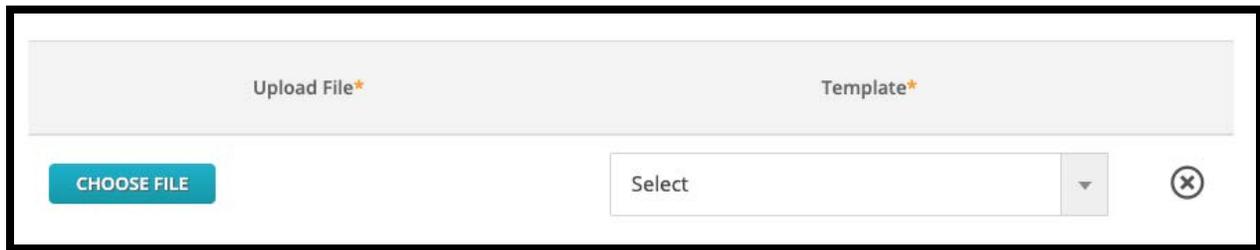
4. Select "Default CVI Addresses" as the template.
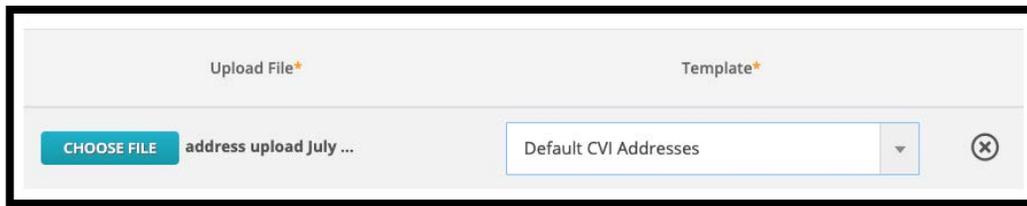
5. Click the orange "Upload" button. You will be taken to a confirmation screen to verify the upload transaction.
6. Click the "Data History" link at the top of the page or the "Back to Data Upload & History" button at the bottom of the page to view the status of your upload.
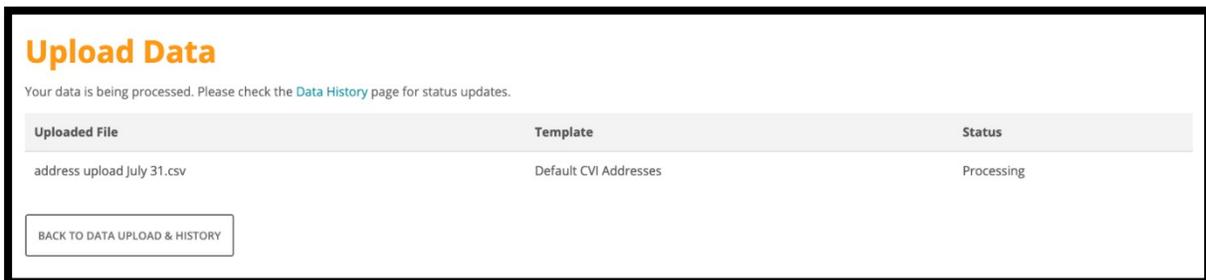
7. Back on the Data History page, the status should be "completed" if the upload was

successful.
Note: Larger files may take longer to upload. A status of "pending" means that the files have not finished processing.

| 07/31/2019 8:14 AM | Default CVI Addresses | Doe, Jane | (555) 555-5555 janedoe@yopmail.com | Completed. 5/5 records successfully processed. |

8. Upload 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)

Core 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

Category 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)

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

Questions or concerns?

Contact AgView Support

Available Monday – Friday, 8:00 am – 5:00 pm Central Time

Phone: (800) 767-6888
Email: support@agview.com