EMFoS Video Tutorial Scripts

Step-by-Step Video Instructions

Version: 1.0.0
Format: YouTube/Loom video scripts
Duration: 2-5 minutes per video

📹 Video Series Overview

#	Title	Duration	Audience
1	Getting Started with EMFoS	3 min	New Users
2	Creating Your First Activity	4 min	New Users
3	Managing Tasks & Status	4 min	New Users
4	Uploading Evidence & Documentation	3 min	New Users
5	Using the Schedule View	3 min	New Users
6	Viewing Reports & Analytics	4 min	New Users
7	Managing Locations	2 min	New Users
8	User Roles & Permissions	3 min	Admins
9	Email Alerts Configuration	4 min	Admins
10	Database Backup & Recovery	5 min	Admins

Video 1: Getting Started with EMFoS

Duration: 3 minutes
Audience: New Users
Goal: Introduce the dashboard and basic navigation

Script

[0:00-0:15] INTRO

- **Visual**: Show EMFoS logo and title
- **Narration**: "Welcome to EMFoS - Environmental Monitoring Fieldwork Operating System. In this video, we'll show you how to get started with the platform."

[0:15-0:45] LOGIN & DASHBOARD

- **Visual**: Screen recording of login page
- **Narration**: "First, log in to your EMFoS account. You'll be automatically logged in with your assigned role. Once logged in, you'll see the main dashboard."
- **Action**: Show dashboard loading

[0:45-1:30] DASHBOARD OVERVIEW

- **Visual**: Highlight each stat card
- **Narration**: "The dashboard shows four key metrics:
  - Total Tasks: All active monitoring tasks
  - Completed: Tasks you've finished
  - Regulatory Critical: Tasks required by regulations
  - Deferred: Tasks that have been postponed"
- **Action**: Point to each card

[1:30-2:15] NAVIGATION MENU

- **Visual**: Hover over sidebar items
- **Narration**: "On the left, you'll find the navigation menu with six main sections:
  - Dashboard: Overview of all tasks
  - Schedule: Calendar view of your work
  - Tasks: Detailed task management
  - Locations: Manage monitoring sites
  - Reports: View analytics and compliance
  - Settings: Configure your account"
- **Action**: Click each menu item briefly

[2:15-2:45] TASK TABLE

- **Visual**: Scroll through task table
- **Narration**: "Below the stats, you'll see the Upcoming Monitoring Tasks table. This shows all your scheduled work with due dates, status, and priority. Click 'Details' on any task to see more information."
- **Action**: Click Details button

[2:45-3:00] OUTRO

- **Visual**: Show dashboard again
- **Narration**: "That's the basics! In the next video, we'll show you how to create your first monitoring activity. See you there!"

Video 2: Creating Your First Activity

Duration: 4 minutes
Audience: New Users
Goal: Walk through activity creation process

Script

[0:00-0:15] INTRO

- **Visual**: Dashboard with "New Activity" button highlighted
- **Narration**: "In this video, we'll create your first monitoring activity. This is the foundation of all your fieldwork tracking."

[0:15-0:45] CLICK NEW ACTIVITY

- **Visual**: Click "New Activity" button
- **Narration**: "Click the 'New Activity' button in the top right of the dashboard."
- **Action**: Show form opening

[0:45-1:30] FILL ACTIVITY NAME

- **Visual**: Type in Activity Name field
- **Narration**: "First, enter the activity name. For example, 'Groundwater Sampling' or 'Air Quality Monitoring'. Be descriptive so you can easily identify it later."
- **Action**: Type example name

[1:30-2:00] SELECT TYPE

- **Visual**: Click Type dropdown
- **Narration**: "Next, select the activity type. You can choose from:
  - Sampling: For water, soil, or air samples
  - Monitoring: For ongoing observations
  - Inspection: For site inspections"
- **Action**: Show dropdown options

[2:00-2:30] SELECT LOCATION

- **Visual**: Click Location dropdown
- **Narration**: "Select the location where this activity will take place. If you don't see your location, you can add it from the Locations page."
- **Action**: Show location options

[2:30-3:00] SET FREQUENCY & DATE

- **Visual**: Select frequency and date
- **Narration**: "Choose how often this activity repeats:
  - Weekly: Every week
  - Monthly: Every month
  - Quarterly: Every three months
  - Annual: Once a year

Then select the first due date for this activity."

- **Action**: Select options

[3:00-3:30] REGULATORY FLAG

- **Visual**: Toggle Regulatory Critical switch
- **Narration**: "If this activity is required by regulations, toggle the 'Regulatory Critical' switch. This helps you prioritize compliance-critical work."
- **Action**: Toggle switch

[3:30-3:50] CREATE ACTIVITY

- **Visual**: Click "Create Activity" button
- **Narration**: "Finally, click 'Create Activity'. The system will automatically generate your first task based on the due date you selected."
- **Action**: Show success message

[3:50-4:00] OUTRO

- **Visual**: Show task in dashboard
- **Narration**: "Congratulations! Your first activity is created. Next, we'll show you how to manage and update task status."

Video 3: Managing Tasks & Status

Duration: 4 minutes
Audience: New Users
Goal: Show how to update task status and track progress

Script

[0:00-0:20] INTRO

- **Visual**: Task table with status badges
- **Narration**: "Tasks go through different statuses as you work on them. Let's learn how to update task status and track your progress."

[0:20-1:00] TASK STATUSES

- **Visual**: Show each status badge
- **Narration**: "There are five task statuses:
  - PLANNED: Task exists but isn't assigned yet
  - SCHEDULED: Task is assigned and ready to execute
  - COMPLETED: Work is finished and documented
  - DEFERRED: Task is postponed with a documented reason
  - CANCELLED: Task is no longer needed"
- **Action**: Point to each status in table

[1:00-1:45] UPDATE STATUS

- **Visual**: Click on status badge
- **Narration**: "To update a task's status, click on the status badge in the task table. A dialog will open where you can select the new status."
- **Action**: Click status badge, show dialog

[1:45-2:30] COMPLETE A TASK

- **Visual**: Select COMPLETED status

- **Narration**: "When you complete a task, select 'COMPLETED'. You'll need to enter:
  - Who completed it (name)
  - Whether it was completed as planned (yes/no)
  - Completion notes describing what was done"
- **Action**: Fill in fields

[2:30-3:15] DEFER A TASK

- **Visual**: Select DEFERRED status
- **Narration**: "If you need to postpone a task, select 'DEFERRED'. You MUST provide a reason for the deferral. This creates an audit trail showing why work was delayed."
- **Action**: Enter reason

[3:15-3:50] SAVE STATUS

- **Visual**: Click "Update Status" button
- **Narration**: "Click 'Update Status' to save your changes. The task will immediately update in the table, and your stats will refresh."
- **Action**: Show update confirmation

[3:50-4:00] OUTRO

- **Visual**: Show updated task table
- **Narration**: "That's how you manage task status! Next, we'll show you how to upload evidence and documentation for completed work."

Video 4: Uploading Evidence & Documentation

Duration: 3 minutes
Audience: New Users
Goal: Show how to attach photos and documents to tasks

Script

[0:00-0:20] INTRO

- **Visual**: Task details dialog
- **Narration**: "Evidence is crucial for proving that work was completed. Let's see how to upload photos, field sheets, and other documentation."

[0:20-1:00] OPEN TASK DETAILS

- **Visual**: Click "Details" button on task
- **Narration**: "First, click the 'Details' button on the task you want to document. This opens the task details dialog."
- **Action**: Show details dialog opening

[1:00-1:45] NAVIGATE TO COMMS TAB

- **Visual**: Click "Comms" tab
- **Narration**: "In the task details, click the 'Comms' tab. This is where you can upload files and attach evidence of your work."
- **Action**: Show Comms tab

[1:45-2:30] UPLOAD FILE

- **Visual**: Click "Upload Evidence / Document" button
- **Narration**: "Click 'Upload Evidence / Document'. You can upload:
  - Photos from fieldwork
  - PDF field sheets
  - Contractor deliverables
  - Any supporting documentation"
- **Action**: Click upload button, select file

[2:30-2:50] VERIFY UPLOAD

- **Visual**: Show file in attachments list
- **Narration**: "Once uploaded, the file appears in your attachments list with the upload date. You can upload multiple files per task."
- **Action**: Show file listed

[2:50-3:00] OUTRO

- **Visual**: Show completed task with evidence
- **Narration**: "That's it! Your evidence is now attached to the task and creates a permanent record of your work. Next, we'll explore the Schedule view."

Video 5: Using the Schedule View

Duration: 3 minutes
Audience: New Users

Goal: Show calendar-based task visualization

Script

[0:00-0:20] INTRO

- **Visual**: Click Schedule in sidebar
- **Narration**: "The Schedule view shows all your tasks on a calendar. This helps you see your workload at a glance and plan ahead."

[0:20-1:00] CALENDAR OVERVIEW

- **Visual**: Show full calendar
- **Narration**: "You're looking at the current month's calendar. Each task appears as a colored box on its due date:
  - Green boxes: Routine tasks
  - Red boxes: Regulatory-critical tasks"
- **Action**: Point to tasks on calendar

[1:00-1:45] NAVIGATE MONTHS

- **Visual**: Click navigation arrows
- **Narration**: "Use the arrow buttons to navigate between months. This lets you plan ahead and see your upcoming workload for the next few months."
- **Action**: Click arrows, show different months

[1:45-2:30] IDENTIFY BUSY PERIODS

- **Visual**: Show month with many tasks
- **Narration**: "The calendar makes it easy to spot busy periods. If you see a lot of tasks clustered on certain dates, you can plan resources accordingly or adjust schedules if needed."
- **Action**: Point to busy areas

[2:30-3:00] OUTRO

- **Visual**: Show calendar again
- **Narration**: "The Schedule view is perfect for planning and resource allocation. Next, we'll look at Reports to analyze your performance."

Video 6: Viewing Reports & Analytics

Duration: 4 minutes

Audience: New Users

Goal: Show how to access and interpret reports

Script

[0:00-0:20] INTRO

- **Visual**: Click Reports in sidebar
- **Narration**: "Reports give you insights into your fieldwork performance and compliance status. Let's explore what's available."

[0:20-1:15] MONTHLY WORKLOAD CHART

- **Visual**: Show bar chart
- **Narration**: "The first chart shows your monthly workload. The blue bars show total tasks scheduled, and the darker bars show completed tasks. This helps you track your completion rate over time."
- **Action**: Point to chart elements

[1:15-2:00] STATUS DISTRIBUTION PIE CHART

- **Visual**: Show pie chart
- **Narration**: "The second chart shows the breakdown of task statuses. You can see at a glance:
  - How many tasks are completed (green)
  - How many are pending (blue)
  - How many are deferred (orange)
  - How many are cancelled (red)"
- **Action**: Point to pie slices

[2:00-2:45] MISSED MONITORING TABLE

- **Visual**: Scroll to table
- **Narration**: "Below the charts, you'll find the Missed Monitoring Summary. This table shows all deferred and cancelled tasks with the reasons why. This is important for compliance and audit purposes."
- **Action**: Show table rows

[2:45-3:30] EXPORT REPORTS

- **Visual**: Click Export buttons

- **Narration**: "You can export your reports in two formats:
  - PDF: For sharing with stakeholders
  - CSV: For importing into spreadsheets or other tools

Click either button to download your report."

- **Action**: Click export buttons

[3:30-4:00] OUTRO

- **Visual**: Show exported report
- **Narration**: "Reports help you stay on top of compliance and performance. Next, we'll show you how to manage monitoring locations."

Video 7: Managing Locations

Duration: 2 minutes
Audience: New Users
Goal: Show how to add and manage monitoring sites

Script

[0:00-0:20] INTRO

- **Visual**: Click Locations in sidebar
- **Narration**: "Locations are the monitoring sites where you conduct fieldwork. Let's see how to add and manage them."

[0:20-1:00] VIEW LOCATIONS

- **Visual**: Show locations page
- **Narration**: "The Locations page shows all your monitoring sites as cards. Each card displays:
  - Location name or ID
  - Number of activities linked to that location"
- **Action**: Point to location cards

[1:00-1:45] ADD NEW LOCATION

- **Visual**: Click "Add Location" button

- **Narration**: "To add a new monitoring site, click 'Add Location'. Enter the location name or ID, such as 'MW-05' for a monitoring well or 'North Perimeter Station' for a specific site."
- **Action**: Click button, enter name

[1:45-2:00] OUTRO

- **Visual**: Show new location in list
- **Narration**: "That's it! Your new location is ready to use when creating activities. Next, we'll cover user roles and permissions for administrators."

Video 8: User Roles & Permissions (Admin)

Duration: 3 minutes
Audience: Administrators
Goal: Explain user roles and access control

Script

[0:00-0:20] INTRO

- **Visual**: Settings page
- **Narration**: "EMFoS has two user roles with different permissions. Let's understand what each role can do."

[0:20-1:15] PROJECT_MANAGER ROLE

- **Visual**: Show PROJECT_MANAGER permissions
- **Narration**: "PROJECT_MANAGER users have full access:
  - Create and edit monitoring activities
  - Create and manage tasks
  - Update task status
  - Upload evidence and documentation
  - View all reports
  - Access settings and manage users
  - Trigger manual alert checks"
- **Action**: Point to each permission

[1:15-2:00] VIEWER ROLE

- **Visual**: Show VIEWER permissions

- **Narration**: "VIEWER users have read-only access:
  - View dashboards and schedules
  - View all reports and analytics
  - See task details and evidence
  - BUT cannot create, edit, or delete anything
  - Cannot access settings or manage users"
- **Action**: Point to each permission

[2:00-2:45] MANAGE USER ROLES

- **Visual**: Go to User Management
- **Narration**: "To manage user roles, go to Settings and click User Management. You can:
  - Invite new users
  - Change a user's role
  - Deactivate users who no longer need access"
- **Action**: Show user management interface

[2:45-3:00] OUTRO

- **Visual**: Show user list
- **Narration**: "Proper role assignment ensures data security and appropriate access levels. Next, we'll configure email alerts."

Video 9: Email Alerts Configuration (Admin)

Duration: 4 minutes
Audience: Administrators
Goal: Show how to set up and test email alerts

Script

[0:00-0:20] INTRO

- **Visual**: Settings page
- **Narration**: "Email alerts notify your team about overdue monitoring tasks. Let's set them up."

[0:20-1:00] ALERT OVERVIEW

- **Visual**: Show Notifications section

- **Narration**: "EMFoS automatically sends email alerts for overdue tasks. By default, alerts run daily at 9:00 AM UTC. Each task gets a maximum of one alert per 24 hours to avoid spam."
- **Action**: Point to notification settings

[1:00-1:45] RESEND SETUP

- **Visual**: Show Resend configuration
- **Narration**: "Alerts are powered by Resend, an email service. To enable alerts:
  1. Create a Resend account at resend.com
  2. Get your API key
  3. Add it to your environment variables
  4. Redeploy the application"
- **Action**: Show each step

[1:45-2:30] CUSTOMIZE SCHEDULE

- **Visual**: Show vercel.json
- **Narration**: "You can customize when alerts run by editing the cron schedule in vercel.json. For example:
  - '0 9 * * *' runs daily at 9 AM UTC
  - '0 14 * * *' runs daily at 2 PM UTC
  - '0 */6 * * *' runs every 6 hours"
- **Action**: Show configuration

[2:30-3:30] TEST ALERTS

- **Visual**: Click "Trigger Manual Alert Check"
- **Narration**: "To test that alerts are working, go to Settings and click 'Trigger Manual Alert Check'. This immediately checks for overdue tasks and sends test emails. Check your inbox and spam folder to verify."
- **Action**: Click button, show email

[3:30-4:00] OUTRO

- **Visual**: Show email alert
- **Narration**: "Email alerts keep your team informed about overdue work. Finally, let's cover database backup and recovery."

Video 10: Database Backup & Recovery (Admin)

Duration: 5 minutes
Audience: Administrators
Goal: Show how to backup and restore database

Script

[0:00-0:20] INTRO

- **Visual**: Terminal window
- **Narration**: "Database backups are critical for protecting your data. Let's learn how to backup and restore your EMFoS database."

[0:20-1:15] WHY BACKUPS MATTER

- **Visual**: Show backup importance
- **Narration**: "Regular backups protect against:
  - Accidental data deletion
  - Hardware failures
  - Security breaches
  - Corruption

We recommend daily automated backups and weekly full backups."

- **Action**: List items on screen

[1:15-2:15] MANUAL BACKUP

- **Visual**: Show terminal commands
- **Narration**: "To create a manual backup, run this command: pg_dump -h localhost -U $PGUSER env_monitor > backup.sql

This creates a SQL file containing all your data. Store this file in a safe location."

- **Action**: Show command execution

[2:15-3:15] AUTOMATED BACKUPS

- **Visual**: Show cron configuration
- **Narration**: "For automated daily backups, add this to your cron jobs: 0 2 * * * pg_dump -h localhost -U $PGUSER env_monitor > /backups/env_monitor_$(date +%Y%m%d).sql

This runs every day at 2 AM and creates a timestamped backup file."

- **Action**: Show cron setup

[3:15-4:15] RESTORE FROM BACKUP

- **Visual**: Show restore command
- **Narration**: "If you need to restore from a backup, run: psql -h localhost -U $PGUSER env_monitor < backup.sql

This restores all data from the backup file. Always test restores in a test environment first."

- **Action**: Show command

[4:15-5:00] OUTRO

- **Visual**: Show backup files
- **Narration**: "Regular backups ensure your data is always protected. That completes our video series! You now have all the knowledge to use and administer EMFoS effectively."

Production Notes

Recording Tips

- Use screen recording software (OBS, Loom, ScreenFlow)
- Record at 1080p or higher
- Use clear, professional narration
- Add captions for accessibility
- Include keyboard shortcuts in text overlays
- Pause briefly when clicking to show action clearly

Video Editing

- Add intro/outro with EMFoS branding
- Include text overlays for key points
- Use cursor highlighting for important elements
- Add background music (royalty-free)
- Include timestamps in description

Publishing

- Upload to YouTube
- Create playlist: "EMFoS Tutorial Series"
- Add links to documentation in video descriptions
- Pin comment with links to other videos
- Share on social media

Accessibility

- Add captions/subtitles
- Provide transcript in description
- Use clear, simple language
- Avoid rapid movements
- Provide audio descriptions for visual elements

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