Building Healthy Communities System Guides

# Administrator Manual

March 30, 2017

## Contents

# 1 Overview

The Building Healthy Communities programme is a partnership that delivers a range of initiatives, activites, interventions and skills classes to improve the well-being of the community as a whole, and the members of that community. As an administrator, you have access to the inner workings of the system, to view and collate metrics on how well the programme is running, and the ability to create and manage initiatives across the Area Partnerships. But if you've come this far, you already know that. What you want to know is, what's this website got to do with anything, and how do I use it? That's where this manual comes in.

The Building Healthy Communities web system is a way to give you, the administrator, the power to easily and simply manage all the data driven aspects of the BHC programme from one consistent location. The service users and volunteers each use other sections of the system, with all their data feeding through to you, where you can view it in the manner you wish. Data can be viewed from the initiative level, through funding, all the way down to the details of individual service users and volunteers, and can be viewed in tables, searched, and downloaded for use elsewhere. Feedback is also integrated into the system, allowing you to track the efficacy of initiatives and the welfare of service users. This manual will walk you through the use of the system, and introduce you to the various features and intricacies of the system, giving examples as we go.

# 2 System Access and Login

The system is currently hosted can be accessed through most major web browsers (Chrome, Firefox, Safari, IE8 or higher). Before accessing the system, you should have your email address and password on hand. If you are a new administrator, who has not previously accessed the system, you should ask another administrator to create an account for you. Upon entering the system, you will be taken to the login page, as seen in Figure 2.

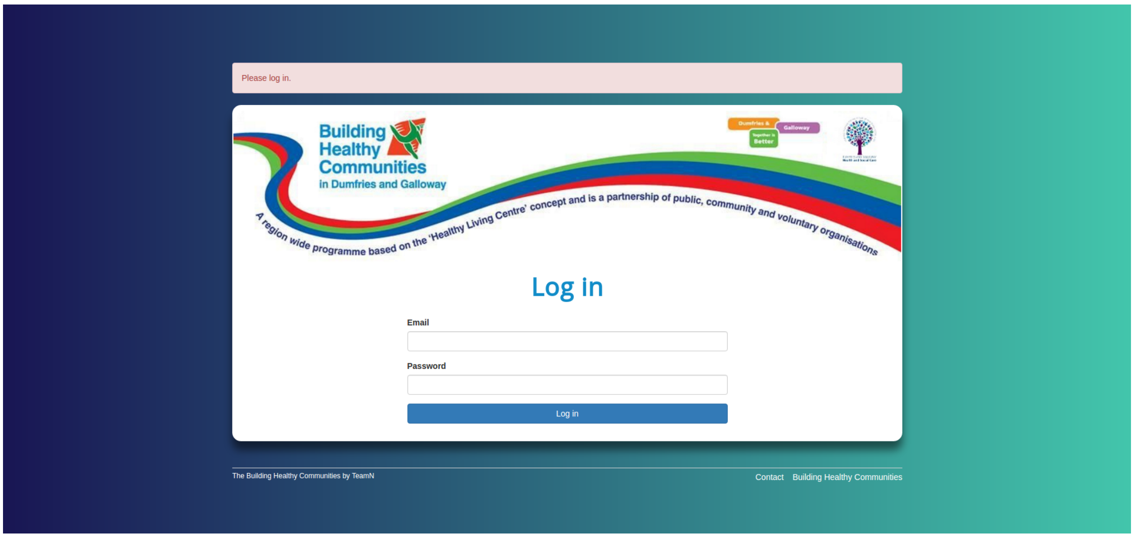


Figure 1: Login page

To login to the system, enter your email address and password. Until you do so, there is no way to gain access beyond this page. In the case that you have forgotten your email address and/or password, see section 14: Contacts and Forgotten Passwords.

# 3 Menu Bar

The menu bar is a persistent feature, appearing at the top of every page on the system. It is designed to allow quick access to every major area of the site, combining a collection of quick links to commonly used sections with a menu bar containing links to the other sections. There is also a Log out button that will log you out and return you to the login screen.

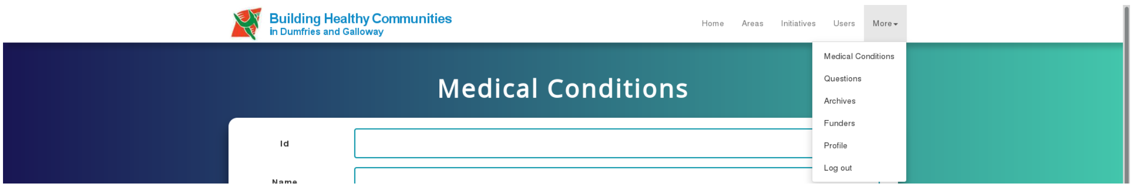


Figure 2: Menu bar with drop down

# 4 Home Page

Upon logging in to the system, the first page that will be loaded is the home page. This page is a quick overview of the system, presenting groups of useful information and allowing you to quickly navigate and execute a few simple actions. The home page is split into three sections: the Area Overview, Statistics, and Service Requests.

## 4.1 Area Overview

The Area Overview is the first major feature on the website home page. From here you can quickly see the names of every initiative run by each area partnership. Clicking the name of an area will take you the relevant area page, and clicking an initiative name will do so for relevant initiative. For more information on areas and initiatives see section 6: Areas and section 7: Initiatives.

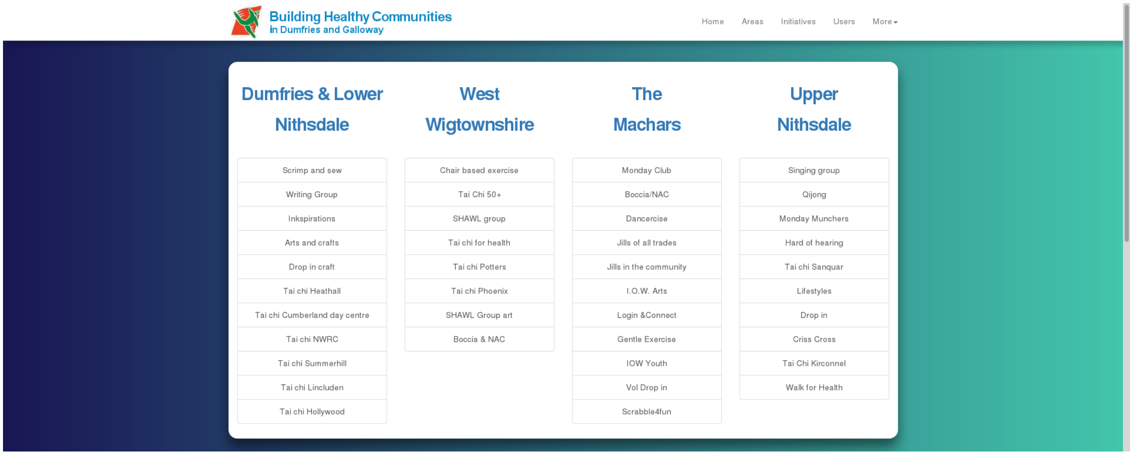


Figure 3: Area Overview

## 4.2 Statistics

The Statistics section is a quick rundown of the status of the system as a whole. It features a small collection of information, including:

- The total number of service users, volunteers, and funders
- The most and least popular initiatives (those with the highest and lowest number of members)
- The most and least assigned medical conditions
- A graph of the total monthly attendance across all initiatives over the last 2 years
- A graph of the average monthly attendance as a percentage, over the same period as above.

Clicking the name of an initiative or condition will take you to the relevant details page.

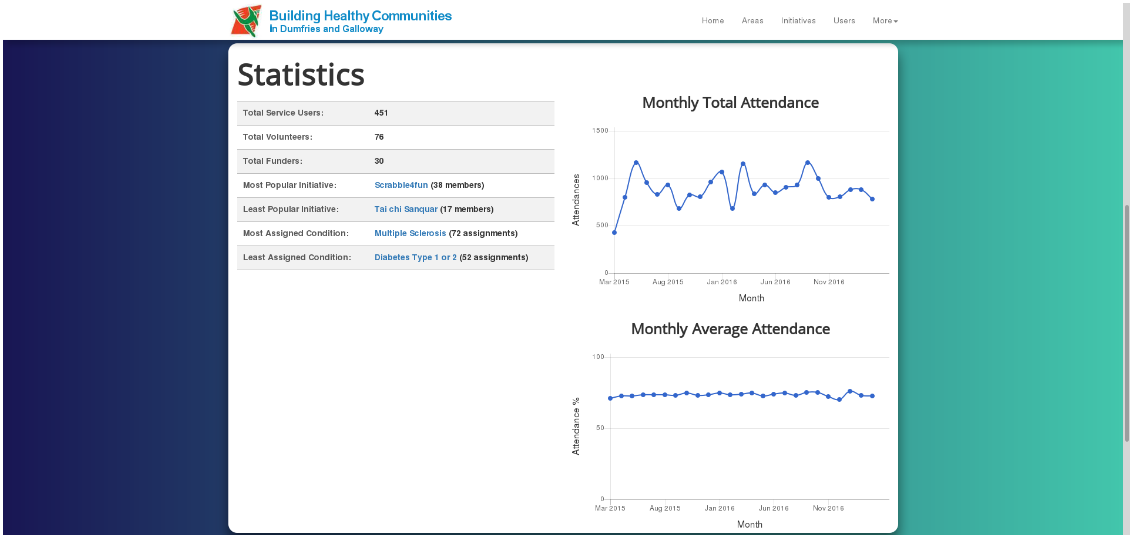


Figure 4: Statistics

### 4.3 Service Requests

The service requests section allows you to see all the messages sent to you by service users ad volunteers asking you to change their details. To change their details, open the user's profile, change the relevant details (described in more details in section 8: Users, and save them. You can then delete the service request.

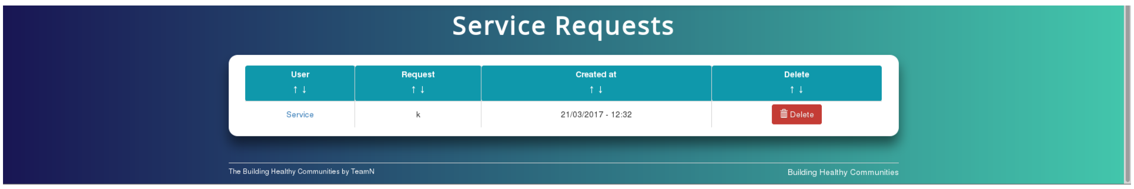


Figure 5: Service Requests

# 5 Data Tables

The data tables are the main focus of the system, the 'power tabs', so to speak. From these pages, you can browse all the entries in the system, or query the database to find specific data. The data tables can be accessed by clicking the relevant link in the menu bar; for example, to get to the Initiatives data table, click the 'Initiatives' link.

## 5.1 Browsing and Organising

To browse a table, simply scroll down the page to view more results. There are 30 results displayed per page, and more can be loaded by clicking the 'next' button or a number at the bottom of the page. The tables can also be organised by any of the columns; clicking the up or down arrow in a column will sort the table by that column in ascending or descending order respectively. Figure 6 shows the second page of the Initiatives table ranked in ascending order by name.

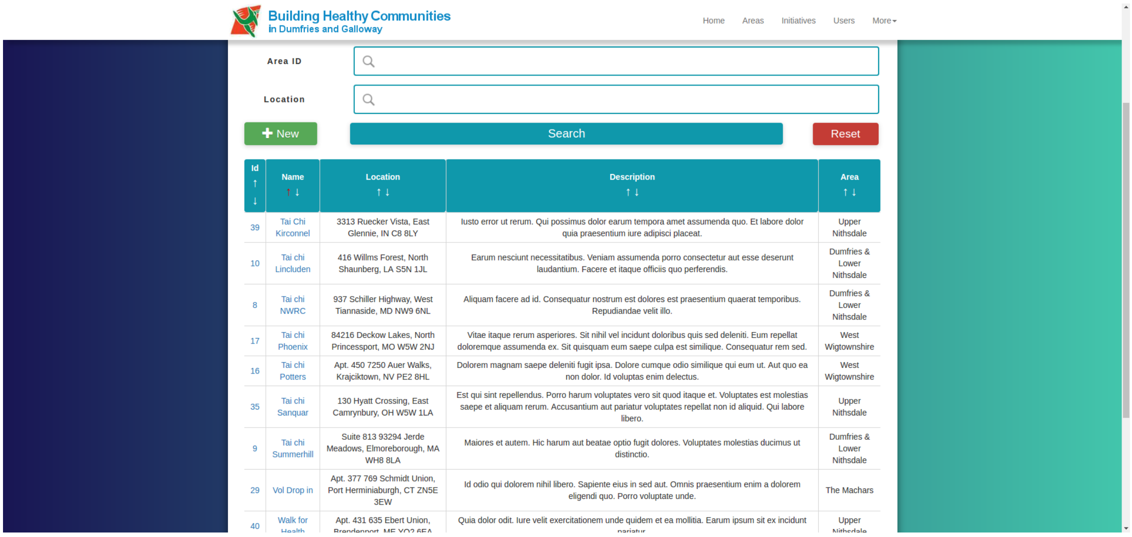


Figure 6: Second page of initiatives ranked in ascending name order

### 5.2 Querying

The data tables can also be queries by each column. To query a table, type your query into the relevant search box, and click search. The boxes are not case sensitive, so 'TAI' and 'tai', or even 'tAi' will return the same results. Queries can also be partial matches, so a search for the number '0141' in a telephone field for example would return every result with a phone number containing those numbers. Incorrect spellings however, are not corrected, so a search for 'Thai' when you intended to search for 'Tai' will not return any results relating to 'Tai'. It is also possible to query multiple columns at once. In Figure 7), there is an example of the result of searching for all 'Tai' events in a location containing the word 'North'. Queries can be reset by clicking the red 'Reset' button to the right of the search button.

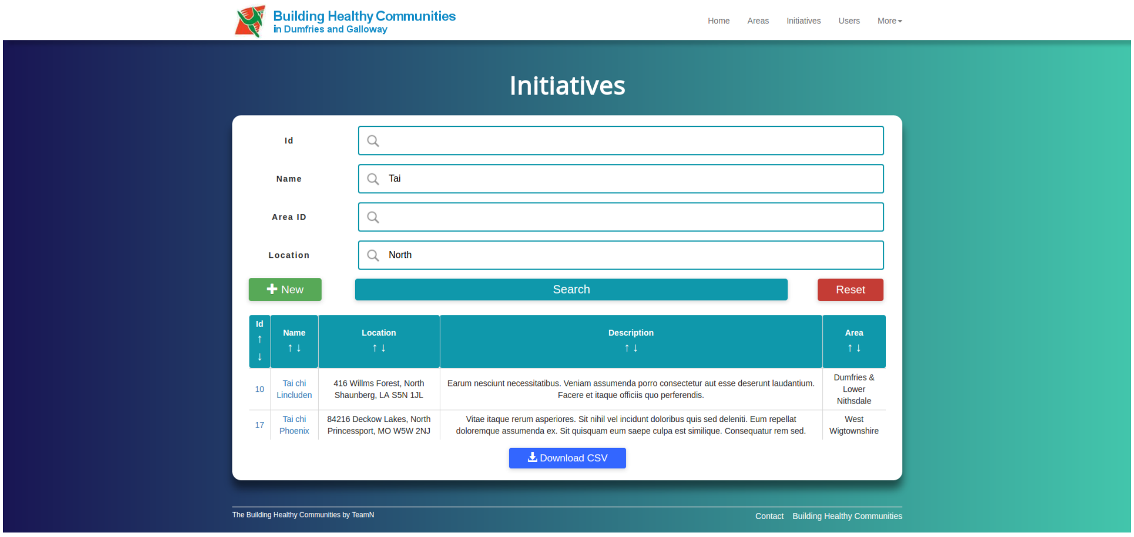


Figure 7: Initiative search for 'Tai' and 'North'

### 5.3 Downloading

It is possible to download the result of any query in the Areas, Initiatives, and Users tables. To do so, scroll to the bottom of the table and click the blue 'Download CSV' button, seen in Figure 8. This will download a CSV file, compatible with spreadsheet software such as Microsoft Excel. It is also possible to download the contents of an entire table without querying, by clicking download without entering a query.

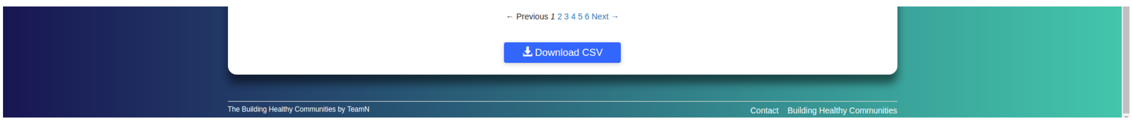


Figure 8: Download Button

## 5.4 Adding New Entries

The final feature available on the data table pages is the ability to add a new entry to the table. The content of a new entry varies by table, but the method is always the same. To add a new entry, click the green 'New Entry' button to the left of the search button. This will take you to the relevant new entry screen. The example in Figure 9 shows a new user being added to the Users table. For more information on the full content of an entry, see the relevant section of the guide.

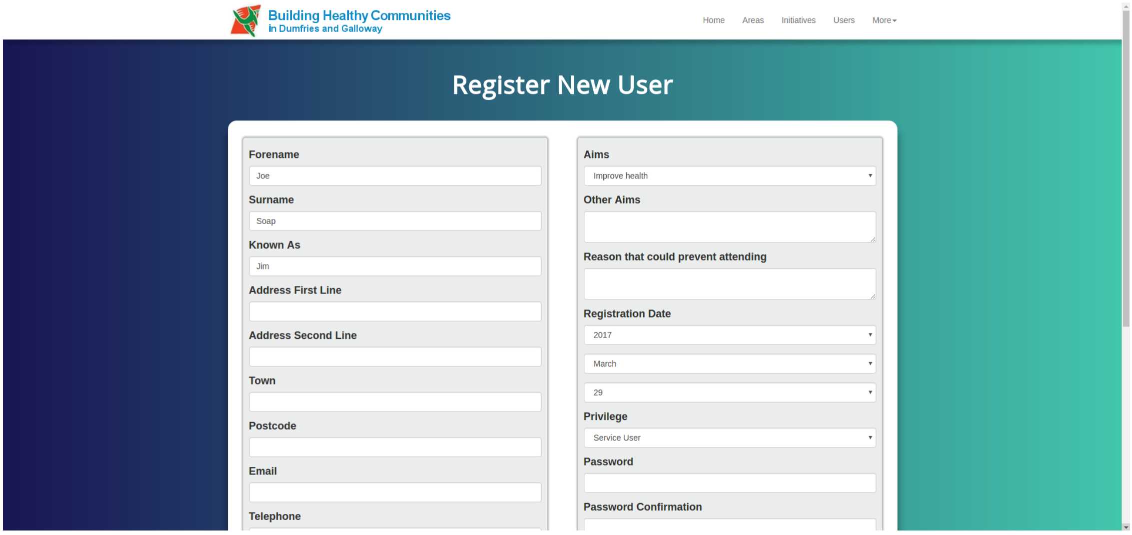


Figure 9: Adding a new user

# 6 Areas

Areas are the largest unit in the Building Healthy Communities programme, being the geographic regions in which initiatives take place. To access the main page of an area, click its name anywhere in the system where it is in blue text. The easiest places to find a link such as this are the Area table, and the links on the home page.

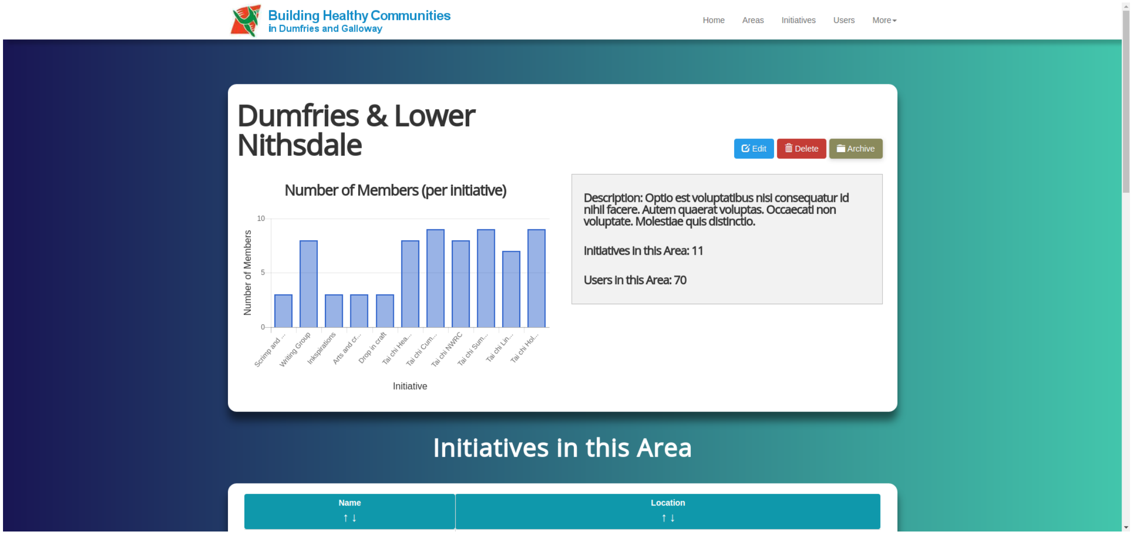


Figure 10: Area Main Page

## 6.1 Information and Statistics

The main page for an area consists of all the information pertaining to that area laid out in three sections:

- The first section contains the area's name, a brief description, the numbers of initiatives active in the area and the number of users enrolled in those initiatives. It also contains a graph of the number of users per initiative.
- The second section contains a table listing all the initiatives for the area. It can be organised by column the same way as the data tables, but not searched.
- The third section contains another table, this time listing all the users enrolled in initiatives within the area. Again, it can be organised but not searched.

## 6.2 Creating a New Area

To create a new area, you must click the 'New' button on the Area data table page, as described in section 5: Data Tables, and you will be taken to a short area creation screen, as seen in Figure 11. As with the edit option, adding a name and description is all that is necessary to create an area. The newly created area will have no initiatives, and therefore no users either. To see how to assign users and initiatives to an area, see section 7: Initiatives and section 8: Users.

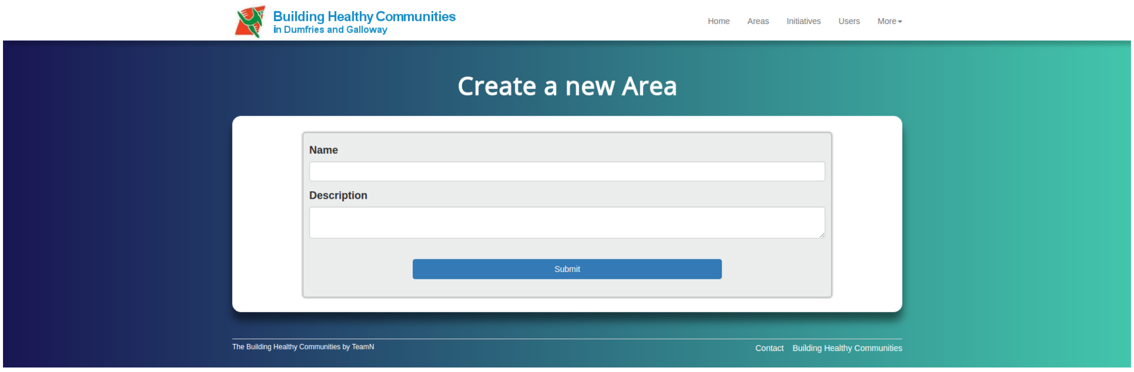


Figure 11: Creating an area

### 6.3 Editing, Deleting and Archiving

The only actions that can be taken with an existing area are editing its details, deleting it, or archiving it. The buttons for all three actions are placed next to each other, above the information box.

Editing the area allows you to change its name and description. As an area is effectively just a geographic region in which other things happen, there is no other information to change. The editing screen can be seen in Figure 12.

Deleting an area will permanently delete it from the database. Any associated initiatives will also be permanently deleted, and those initiatives will disappear from the enrolment lists of each user that was enrolled in them. This is a permanent action, deleting the data itself, and cannot be undone!

Archiving an area is similar to deleting, except that it will not permanently delete data. Instead, the area and its initiatives will be placed in the archives. For more on archiving, see section 13

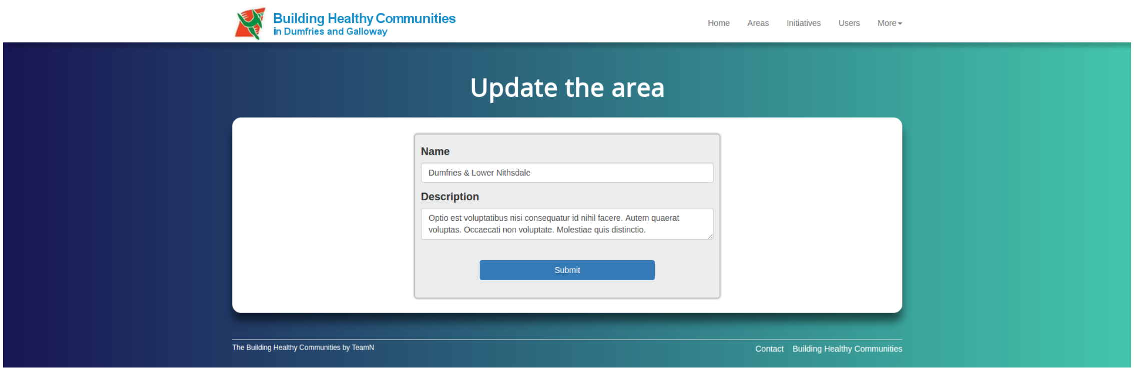


Figure 12: Editing an area

# 7 Initiatives

Initiatives are the main thrust of the BHC programme, being the events that are run for the benefit of the community. To access the main page of an area, click its name anywhere that it can be found, as with areas. Again, the easiest place to find an initiative name is on the home page or in the Initiatives table.

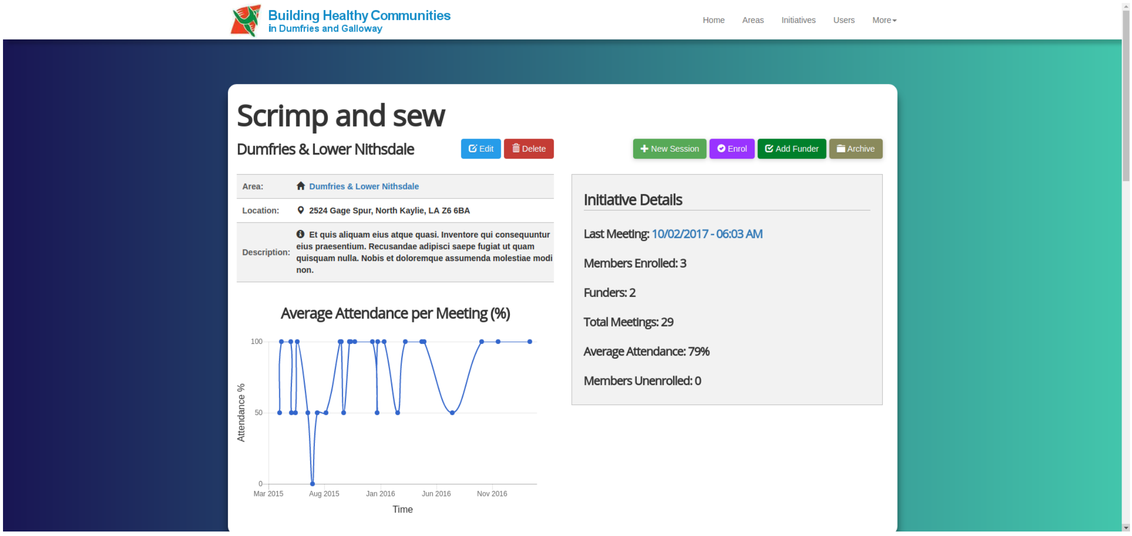


Figure 13: Initiative main page

## 7.1 Information and Statistics

The main page for an initiative displays all the relevant information about that initiative, laid out in four sections:

- The first section contains the initiative's name, a brief description, the date of the last meeting, and the number of enrolled users, and a few other statistics. It also contains a graph of the attendance over time.
- The second section contains a table listing all the users enrolled in the initiative. It can be organised by column the same way as the data tables, but not searched.
- The third section contains another table, this time listing all meetings of the initiative, both past and scheduled. Again, it can be organised but not searched.
- The final section conatins a third table, listing the funding the initiative receives.

## 7.2 Creating a New Initiative

To create a new initiative, you must click the 'New' button on the Initiatives data table page, as described in section 5: Data Tables, and you will be taken to a short initiative creation screen, as seen in Figure 14. As with the edit option, adding a name, description, location and area is all that is necessary to create an initiative. The newly created initiative will have no users. To see how to assign users to an area, see the Enrolment and Funding section below.

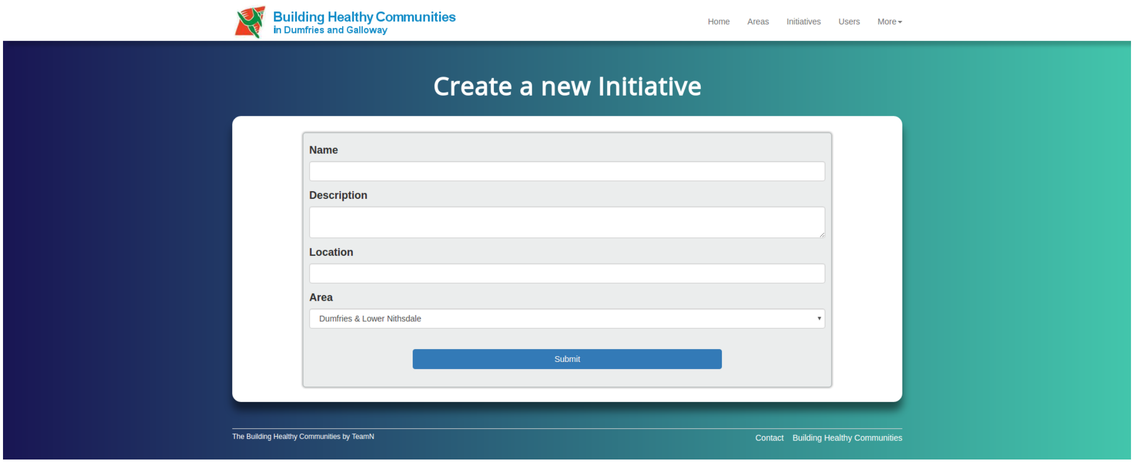


Figure 14: Creating an initiative

### 7.3 Editing, Deleting and Archiving

The edit, delete and archive buttons are in the same section as the main statistics, as with areas, but are slightly differently placed.

Editing an initiative allows you to change the name, description and location of an initiative, and also allows you to change the area that initiative belongs to. The editing screen can be seen in Figure 15.

Deleting permanently deletes all trace of the initiative from the database, and all users enrolled in it will no longer have it on their enrolment lists. This is a permanent action, deleting actual data, and cannot be undone!

Archiving does not delete the data, but instead places the initiative into the archives. For more on archiving, see section 13

### 7.4 Enrolment and Funding

To enrol a new user, simply click the purple 'Enrol' button near the top of the first section of the page, and type in a user's name in the box that appears. Clicking submit will enrol them in the initiative. Unenrolling must be done from the user's page, described in section 8.

To add new funding, follow a similar procedure to the above, this time selecting the dark green 'Add Funding' button, and selecting a funder from the drop down menu that appears on the next screen. Clicking submit will add them as a funder to the initiative, where they can be viewed at the bottom of the main page, and removed by clikcing the blue 'Remove funding' button.

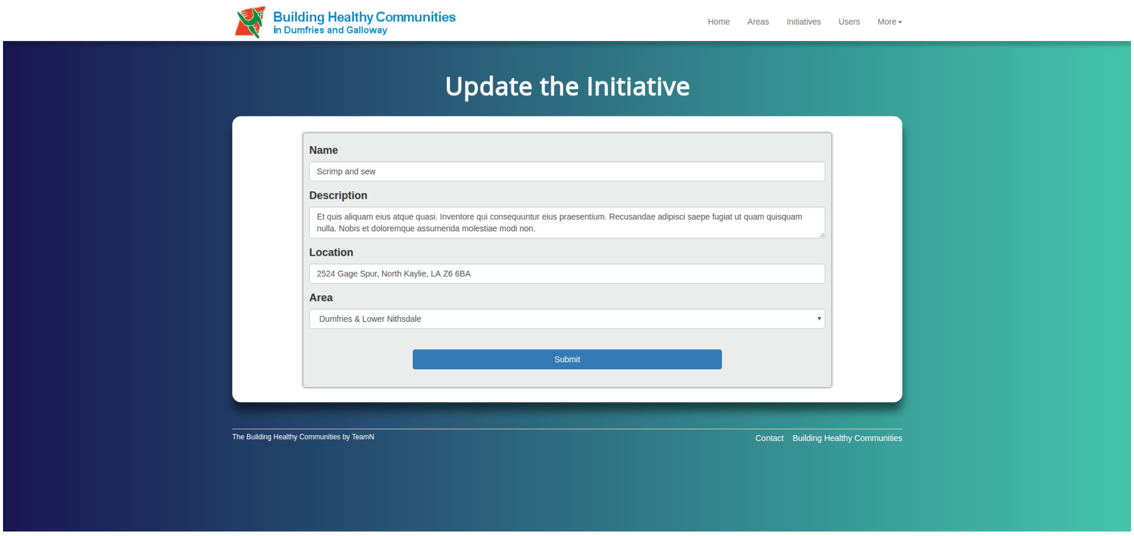


Figure 15: Editing an initiative

### 7.5 Meetings and Sessions

To add a new session, click the green 'New Session' button near the top right of the initiative main page. This will take you to a page titled 'New Meeting', seen in Figure 16. A session is a series of meetings, spaced one week apart but at the same time of day. Use the drop down menus to select the time you want the first meeting to be scheduled for, and the number of weeks you want it to run for. To schedule a single meeting, select 1 week in the 'Weeks to run for' drop down.

For more information on meetings, see section 12: Meetings.

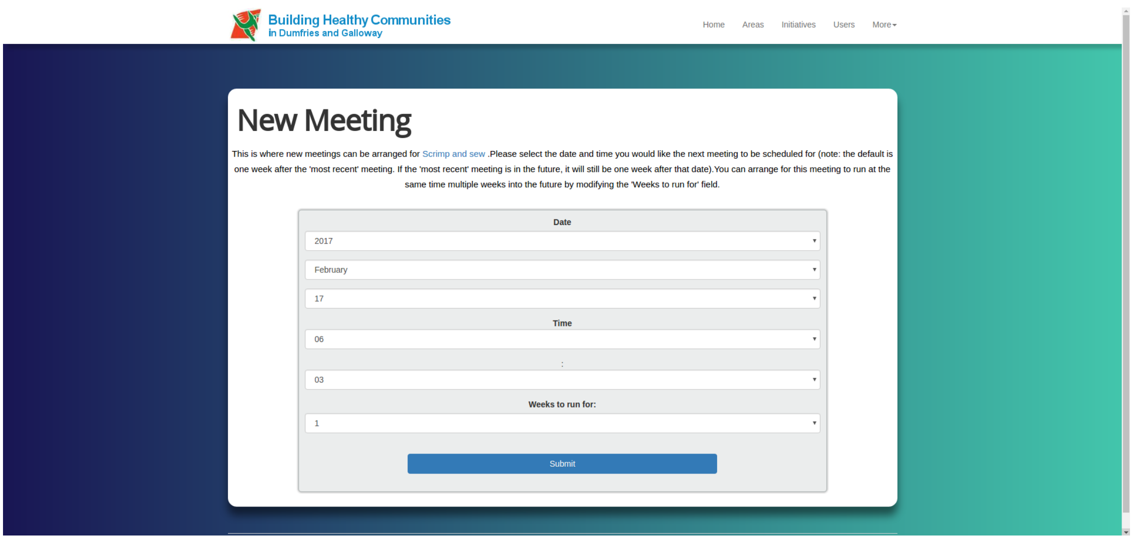


Figure 16: Creating a new session

# 8 Users

Users are anyone who uses the BHC system, from service users, to volunteers, to administrators such as yourself. The user pages contain all the information about a particular user, and allow you to complete all of the actions associated with them. For this reason, the user page is one of the most detailed on the system. To access the page for a given user, click their name wherever it appears as with any other page. The easiest way to find a user is to search the User data table.

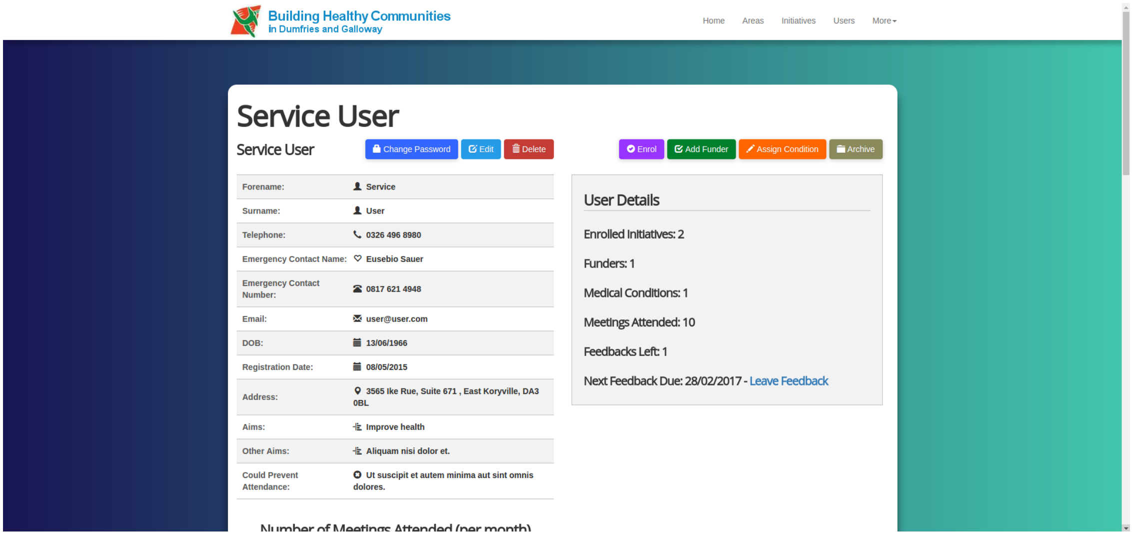


Figure 17: User main page

## 8.1 Information and Statistics

The main page of a user contains a wealth of information, organised into six sections:

- The first section contains all the user's personal details (name, address, contact details etc), along with their number of enrolled initiatives and assigned medical conditions, the amount of feedback they have left and when the next feedback is due, along with a few other useful bits of information. There is also a graph of their number of meetings attended per month.
- The second section contains a list of all the feedback a user has left.
- The third section contains a table listing all the initiatives a user is enrolled in. This table can be organised by column like the data tables, but not searched.
- The fourth section contains another table, listing the medical conditions a user currently has. If a medical condition has been unassigned, a new table will appear containing the user's medical history.
- The fifth section contains a table listing the direct funding a user receives for attending initiatives. This can be organised by column as previousy mentioned.

- The final section contains two lists of indirect funding the user receives; one for the funding given to initiatives they are enrolled in, and one for the funding the BHC programme receives for medical conditions they have been assigned.

## 8.2 Creating a New User

To create a new user, you must click the 'New' button on the User data table, as described in section 5: Data Tables. This will take you to a user creation screen, as seen in Figure 18, which will ask you to fill in all of the details of the new user. Please have this data on hand, as there is a lot of data to input. After clicking submit, the new user will appear in the User tables. However, they will not be enrolled in any initiatives, or have been assigned any medical conditions. To see how to enrol and assign, see later parts of this section.

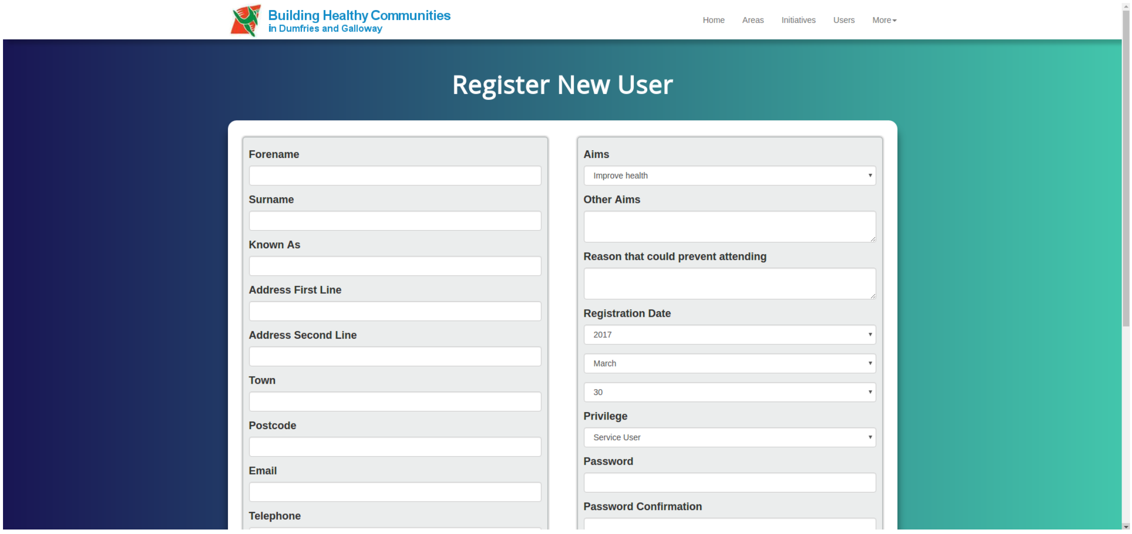


Figure 18: Creating a user

## 8.3 Editing, Deleting and Archiving

There are several reasons you may want to edit or remove a user; they may have moved house, they may have been removed from all initiatives, they may have passed away, or any number of other things. The edit, delete, and archive buttons are placed at the top of the screen, along with several other options. There is also a change password option.

To edit a user's details, simply click the blue 'Edit' button and you will be taken to a page where you can edit any of their personal details. Clicking submit will immediately send the changes to the database. To change a password, however, you must use the darker blue 'Change Password' option. This will prompt you to type in the new password, then again for confirmation.

Deleting a user permanently deletes all trace of the condition from the database, removing the user's entry and any links they had to medical conditions or initiatives. This is a permanent action, deleting actual data, and cannot be undone!

Archiving does not delete the user, but instead places them into the archives. Upon archiving you will be prompted to give a reason. For more on archiving, see section 13

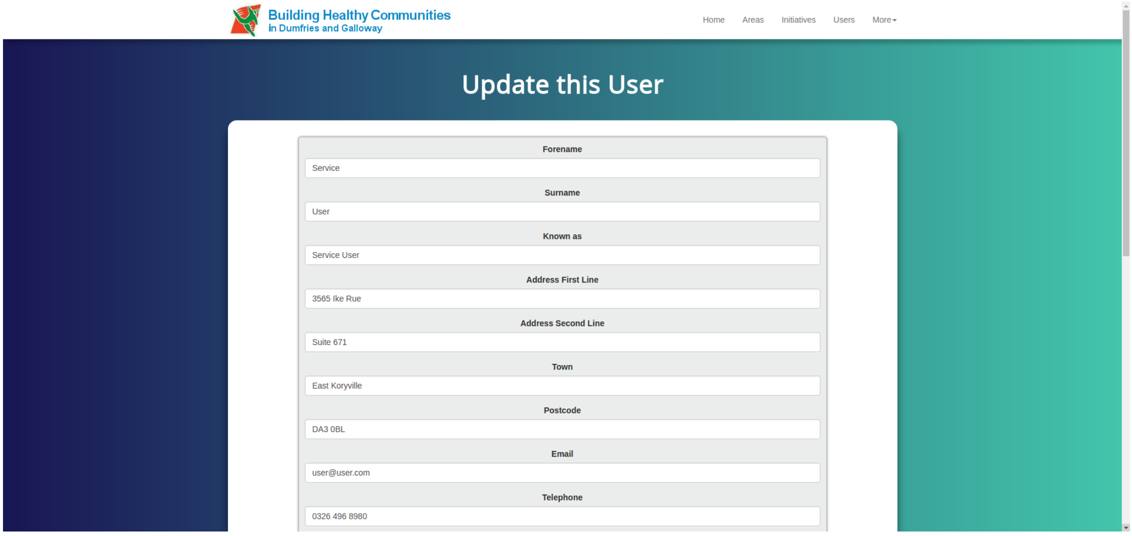


Figure 19: Editing a user

### 8.4 Enrolment, Funding and Medical Conditions

To enrol a user into an initiative, click the purple 'Enrol' button near the top right of the user's main page. This will prompt you to type in the name of an initiative and select it from the auto complete suggestions, similar to enrolling a user from the page of an initiative.

Assigning funding works similarly, click the green 'Add Funder' button next to 'Enrol' and select a funder from the drop down menu that is on the next page.

Finally, assigning a medical condition works exactly the same way as enrolling; click the orange 'Assign Condition' button and type in the name of a condition.

### 8.5 Profile

The 'Profile' link found in the drop down menu area of the website's top bar takes you to your own user page. From here, you can edit any of your own information using the same methods as those outlined above. You can even archive or delete yourself, but it is inadvisable to do so as you wil be locked out of the system if you do, and another administrator would have to unarchive or recreate your account.

# 9 Medical Conditions

Medical conditions can seriously affect the wellbeing of members of the community, and because of this, many initiatives have funding targeted at particular conditions to try and improve the wellbeing of those people. The medical conditions pages allow you to see who has been assigned which conditions, and which medical conditions get funding from where. Medical condition main pages, like all other pages, can be accessed by clicking their names wherever they are found. They can most easily be found in the Medical Conditions data table.

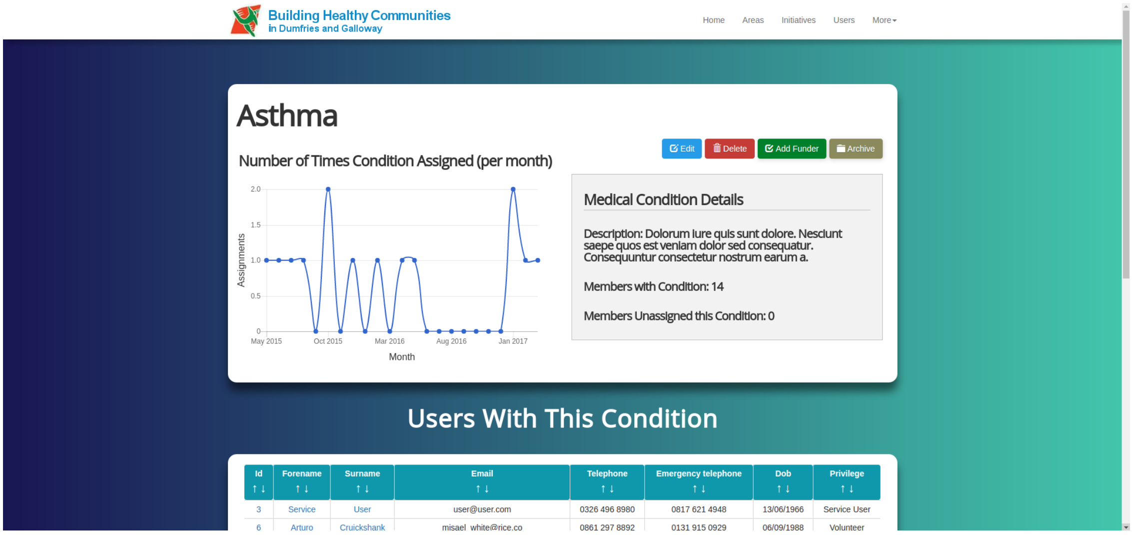


Figure 20: Medical condition main page

## 9.1 Information and Statistics

The main page for a medical condition displays all the relevant information about that condition, laid out in three sections:

- The first section contains the conditon's name, a brief description and the number of members who have the condition or have had it unassigned from them. It also contains a graph of assigenemnts over time.
- The second section contains a table listing all the users assigned the condition. It can be organised by column the same way as the data tables, but not searched.
- The final section contains a second table, listing the funding the programme receives for those conditions.

### 9.2 Creating a New Medical Condition

To create a new medical condition, you must click the 'New' button on the Medical Condition data table page, as described in section 5: Data Tables, and you will be taken to a short area creation screen. As with the edit option, adding a name and description is all that is necessary to create a new condition. The newly created area will not be assigned to any users. To see how to assign conditions to users, see section 8: Users.

### 9.3 Editing, Deleting and Archiving

The edit, delete and archive buttons are in the same section as the main statistics, as with areas, but are slightly differently placed.

Editing a medical condition allows you to change its name and description.

Deleting a condition permanently deletes all trace of the condition from the database, and all users it has been assigned to will no longer have it. This is a permanent action, deleting actual data, and cannot be undone!

Archiving does not delete the data, but instead places the medical condition into the archives. For more on archiving, see section 13

### 9.4 Funding

To add new funding to a user, select the dark green 'Add Funding' button, and select a funder from the drop down menu that appears on the next screen. Clicking submit will add them as a funder to the medical condition, where they can be viewed at the bottom of the main page, and removed by clicking the blue 'Remove funding' button. For more on funding, see section 10: Funders.

# 10 Funders

Funders are the partners who give the funding to allow initiatives to take place. A funder can give funding for a particular initiative, a particular medical condition, or even to a particular user. To access the main page of a funder, click their name wherever it can be found (as with each other entry, they can most easily be found in the Funders data table).

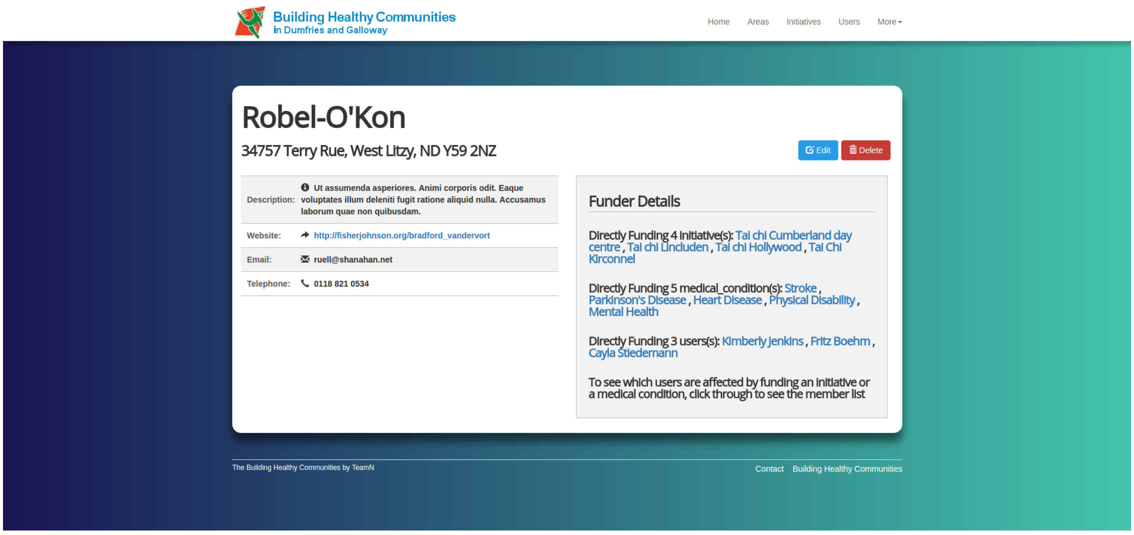


Figure 21: Funder main page

The main page for a funder is only a single section, which gives all the information about that funder, including which initiatives, conditions, and users they directly fund.

Funders may also be edited and deleted, but not archived. To edit a funder, click the blue 'Edit' button near the top right of their main page. This will load a page allowing you to change the name, description, and contact details of the funder.

Deleting a funder can be done by clicking the red 'Delete' button, also in the top right of their main page. Deleting a funder will remove them from the database entirely, and remove them as funders from each of the relevant initiatives, users and medical conditions. This is a permanent action, deleting actual data, and cannot be undone!

# 11 Questions and Feedback

Questions are asked to users when they submit feedback. From the Questions data table, you can see all of the questions currently asked to users upon clicking the 'Leave feedback' links on their home pages.

The feedback from user themselves can be found by going to a particular user's page and navigating to the feedback section (described in more detail in section 8: Users. All of their feedback can be viewed, to get a sense of how their wellbeing has changed over time.

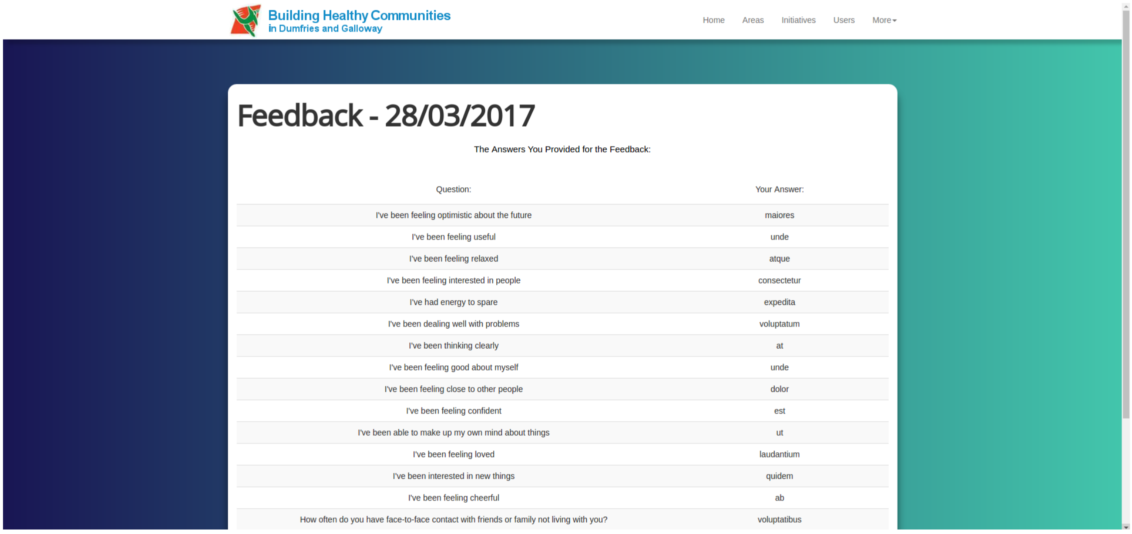


Figure 22: Feedback page

# 12 Meetings

Meetings are the actual gatherings associated with initiatives. To view the page for a meeting, go to the main page for the relevant initiative, and select it from the meetings list, as seen in section 7

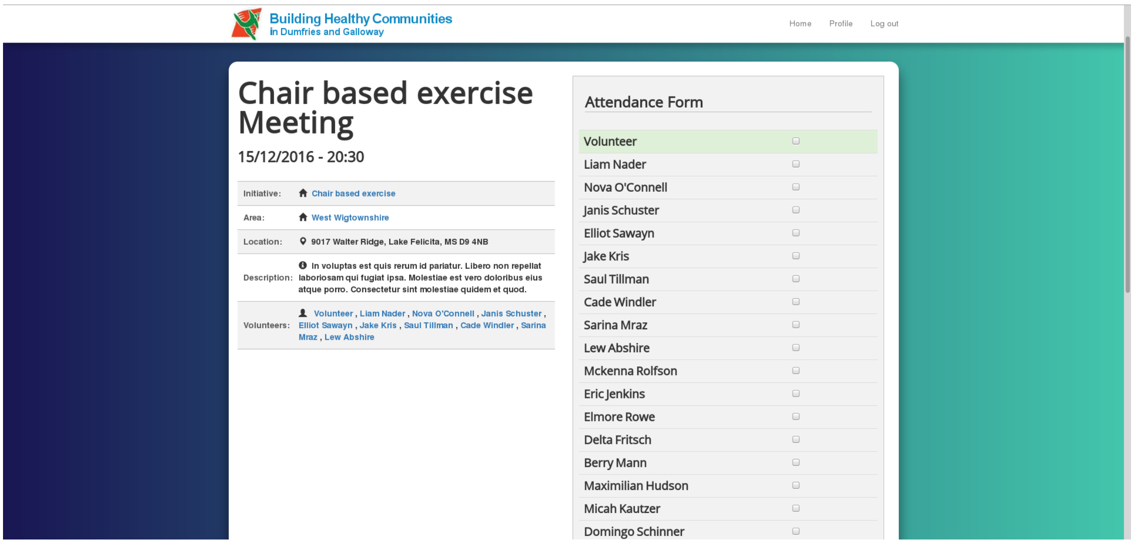


Figure 23: Meeting page

The page for a meeting contains only a single section, with an attendance form showing all the users who turned up at that meeting, the details of the meeting including time and place, and a pie chart showing the attendance percentage. The attendance can also be retaken, if you believe a mistake was made at the time.

# 13 Archives

As mentioned in previous sections, archived informtation is not deleted from the database. Instead, it is stored here in the archives. All archived information is stored on the same page, split into several tables, each of which can be organised by column. Entries that can be archived include:

- Users
- Initiatives
- Areas
- Medical conditions

Information can be archived and unarchived at any time. In general, when archiving an entry such as a user, you will be asked for the reason the entry is being archived. For example, a service user may have passed away, but their records will need to be kept for a while after death, and so you can record the reason for archiving as the user passing away rather than just deleting their entry entirely.

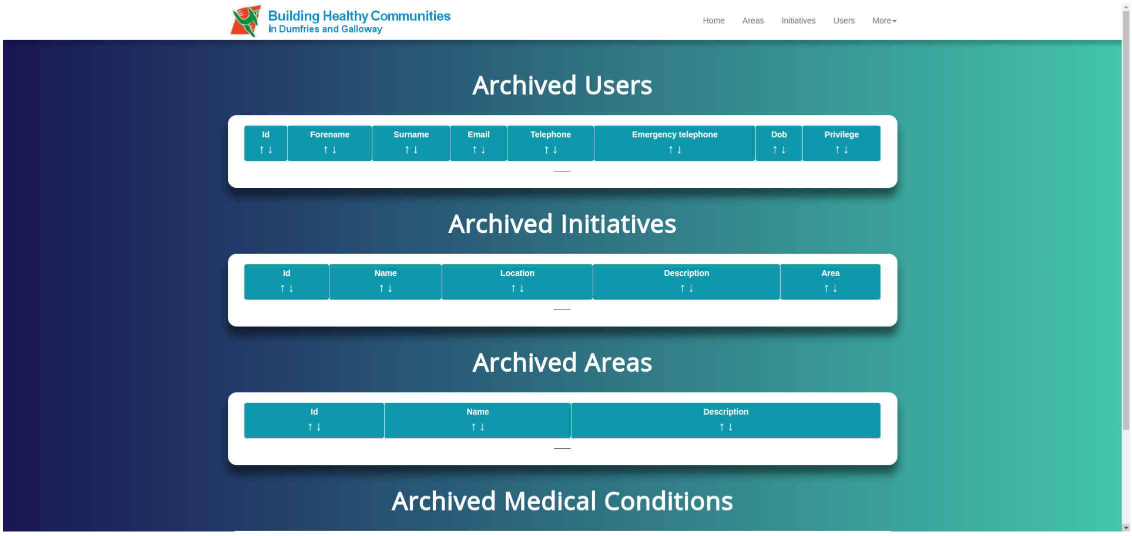


Figure 24: Empty archive page

## 14 Contacts and Forgotten Passwords

If you want to find contact details for a given area, there is an easy way to do so. On the login page (you will have to log out if you are currently logged in), in the bottom right is the word 'Contact'. Clicking on this will bring up the contacts page, from which the addresses of the various area partnerships can be found, as seen in Figure 25. This page also includes the names and roles of people working there, and a telephone number. If you have forgotten your email address and/or password, then you should contact another administrator directly, as the situation could pose a security risk. Other administrators can reset your account details, but should only do so with your explicit authorisation.

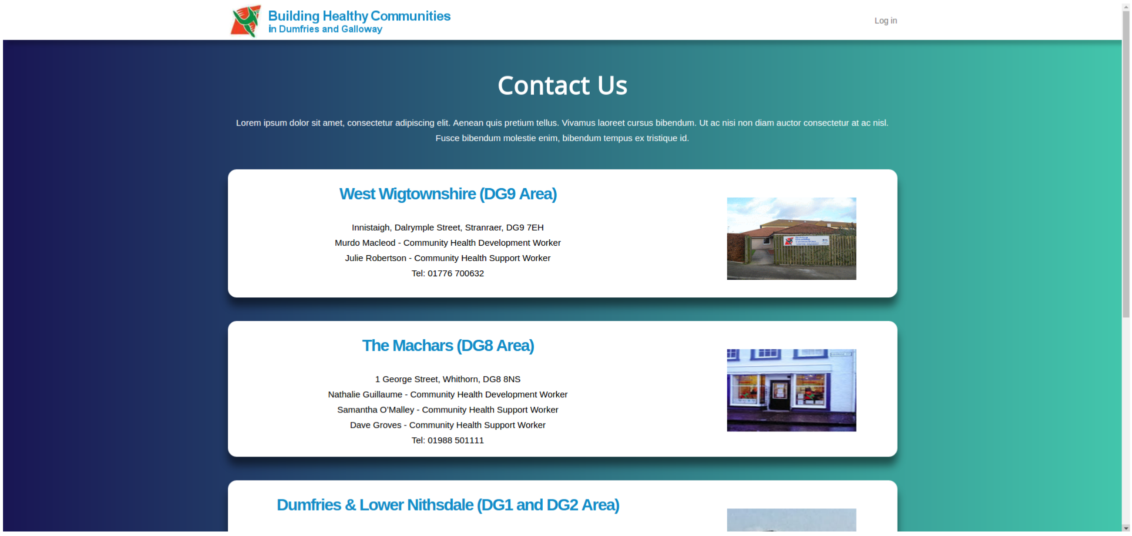


Figure 25: Contact page