



# Building Healthy Communities System Guides

## Administrator Manual

March 29, 2017

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# 1 Overview

The Building Healthy Communities programme is a partnership that delivers a range of initiatives, activities, 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](#).

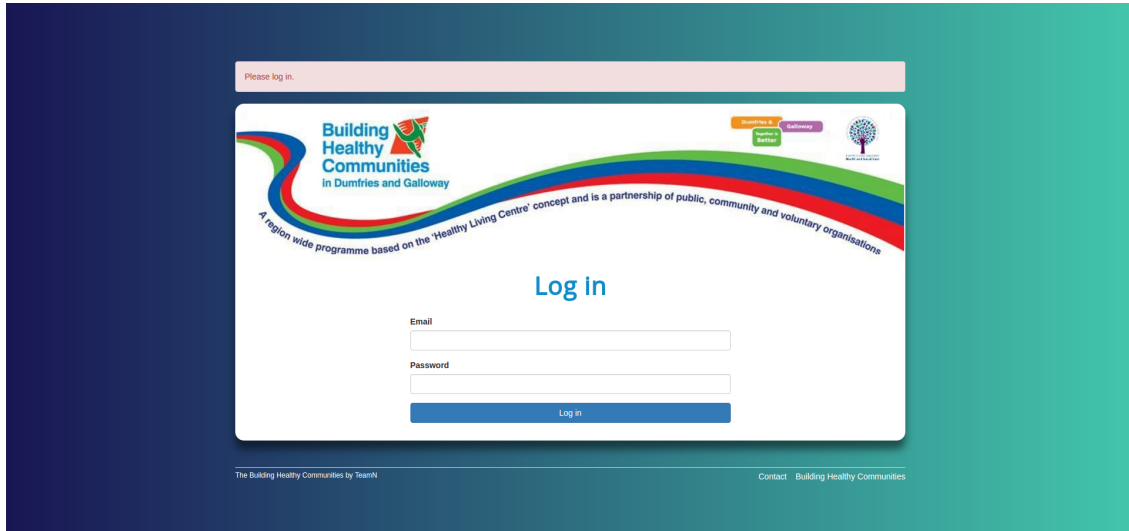


Figure 1: Login page

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.

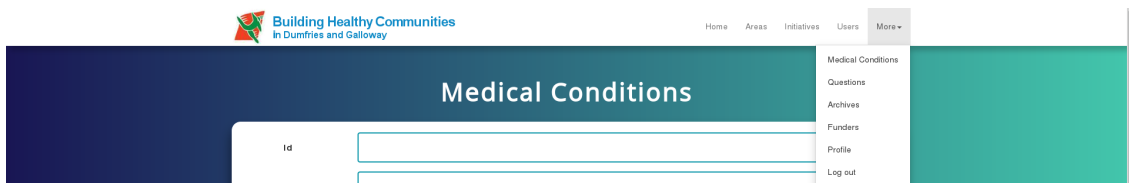


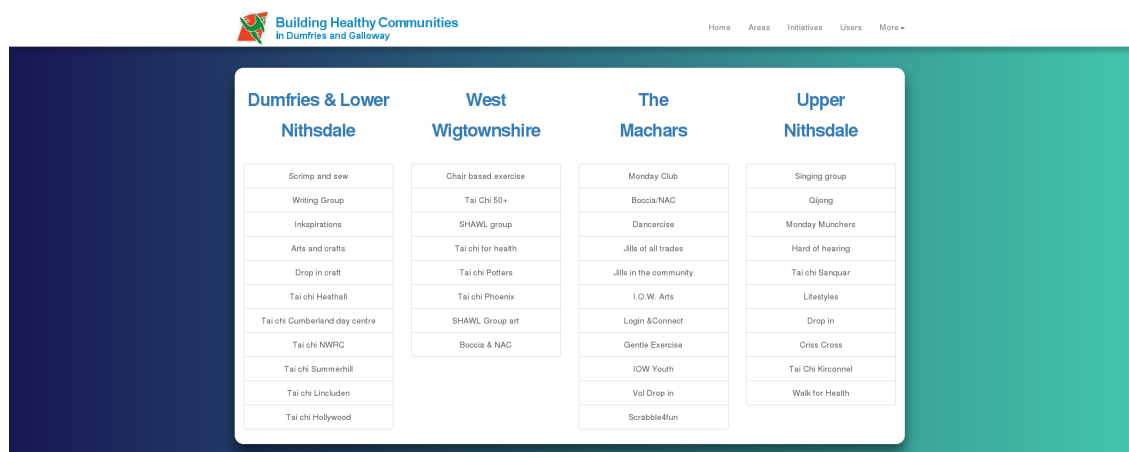
Figure 2: Menu bar with drop down

## 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](#).



Dumfries & Lower Nithsdale	West Wigtownshire	The Machars	Upper Nithsdale
Scrimp and sew	Chair based exercise	Monday Club	Singing group
Writing Group	Tai Chi 50+	Boccia/NAC	Qigong
Inspirations	SHAWL group	Dancercise	Monday Munchers
Arts and crafts	Tai chi for health	Jills of all trades	Hard of hearing
Drop in craft	Tai chi Potters	Jills in the community	Tai chi Sanquar
Tai chi Heathall	Tai chi Phoenix	I.O.W. Arts	Lifestyles
Tai chi Cumberland day centre	SHAWL Group art	Login & Connect	Drop in
Tai chi NWRC	Boccia & NAC	Gentle Exercise	Cries Cross
Tai chi Summerhill		IOW Youth	Tai Chi Kircornet
Tai chi Lincluden		Vol Drop in	Walk for Health
Tai chi Hollywood		Scrabble4fun	

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.

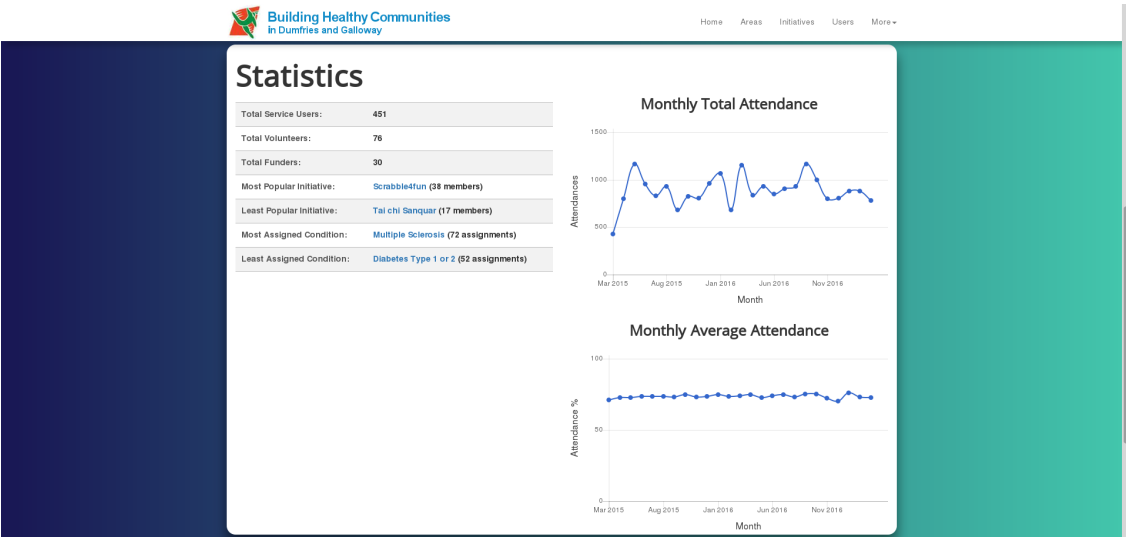


Figure 4: Statistics

### 4.3 Service Requests

The service requests section allows you to see all the messages sent to you by service users and 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.

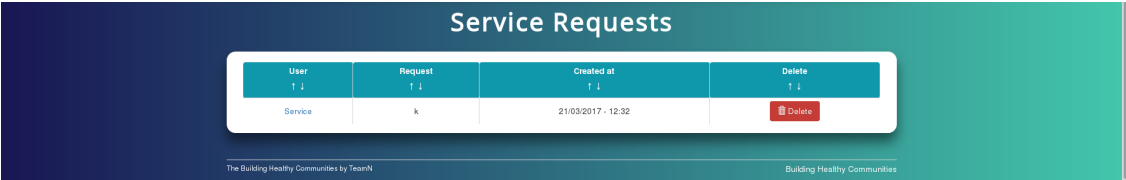


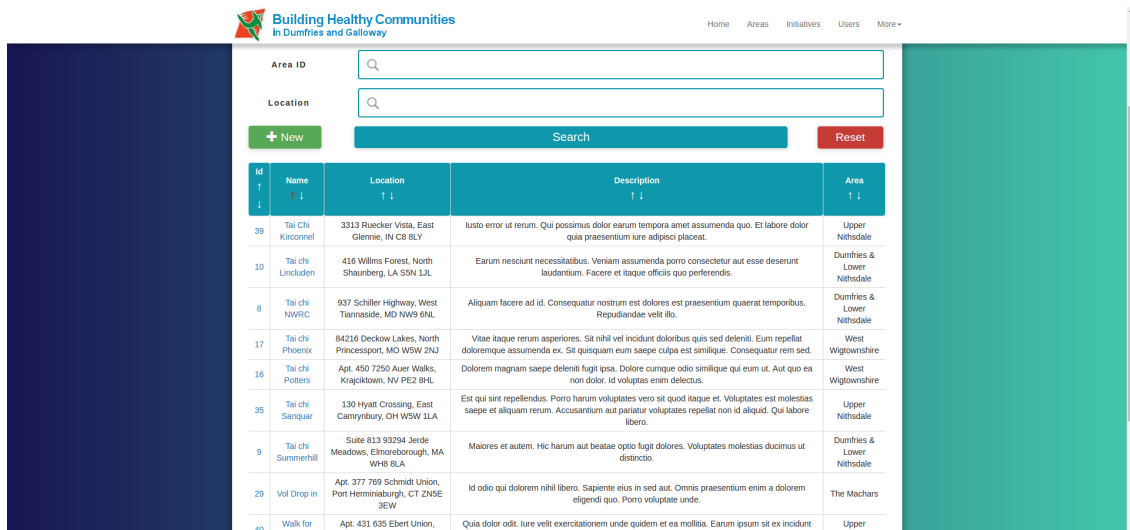
Figure 5: Service Requests

## 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.



Id	Name	Location	Description	Area
39	Tai Chi Kincornel	3313 Ruecker Vista, East Glenrie, IN C8 BLY	Iusto error ut rerum. Qui possimus dolor eorum tempora amet assumenda quo. Et labore dolor quia praesentium iure adipisci placeat.	Upper Nithsdale
10	Tai chi Lincluden	416 Wilms Forest, North Shaumburg, LA 53N 13L	Ea eum nesciunt necessitatibus. Veniam assumenda porro consectetur aut esse deserunt laudantium. Facere et itaque officis quo perferendis.	Dumfries & Lower Nithsdale
8	Tai chi NWRC	937 Schiller Highway, West Tiamasside, MD NW9 6NL	Aliquam facere ad id. Consequatur nostrum est dolores est praesentium quaerat temporibus. Repudiandae velit illo.	Dumfries & Lower Nithsdale
17	Tai chi Phoenix	84216 Deekow Lakes, North Princessport, MO W5W 2NJ	Vitae itaque rerum superiores. Sit nihil vel incidunt doloribus quis sed deleniti. Eum repellat doloremque assumenda ex. Sit quisquam eum saepe culpa est similique. Consequatur rem sed.	West Wigtownshire
16	Tai chi Potters	Apt. 450 7250 Auer Walks, Knapkown, NY PE2 8HL	Dolorem magnam saepe deleniti fugit ipsa. Dolor eumque odio similique qui eum ut. Aut quo ea non dolor. Id voluptas enim delectus.	West Wigtownshire
35	Tai chi Sarguar	130 Hyatt Crossing, East Camrybury, OH W5W 1LA	Est qui sint repellendus. Porro harum voluptates vero sit quod itaque et. Voluptates est molestias saepe et aliquam rerum. Accusantium aut pariatur voluptates repellat non id aliquat. Qui labore libero.	Upper Nithsdale
9	Tai chi Summerhill	Suite 813 93294 Jerde Meadows, Elmoresborough, MA W5W 8LA	Maiores et autem. Hic harum aut beatae optio fugit dolores. Voluptates molestias ducimus ut distinctio.	Dumfries & Lower Nithsdale
29	Vol Drop in	Apt. 377 769 Schmidt Union, Port Herminaburgh, CT ZN5E 3EW	Id odio qui dolorem nihil libero. Sapiente etus in sed aut. Omnis praesentium enim a dolorem eligendi quo. Porro voluptate unde.	The Machars
40	Walk for Lough	Apt. 431 635 Ebert Union, Brandoonnet ME VVY 6EA	Quia dolor odit. Iure velit exercitationem unde quidem et ea mollitia. Eorum ipsum sit ex incidunt	Upper Nithsdale

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.

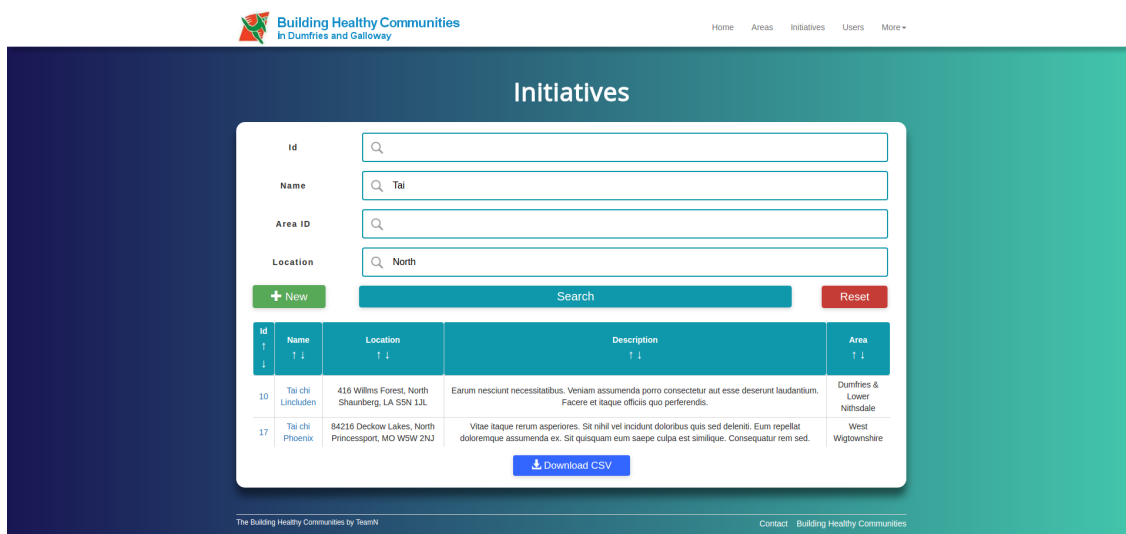


Figure 7: Initiative search for 'Tai' and 'North'

### 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.

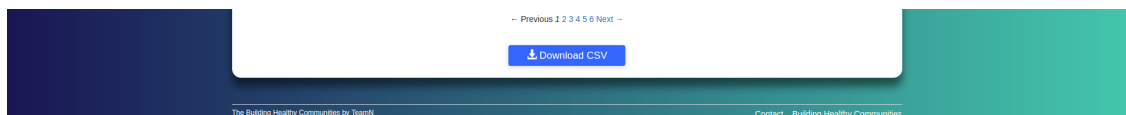


Figure 8: Download Button

### 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.

### 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 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.

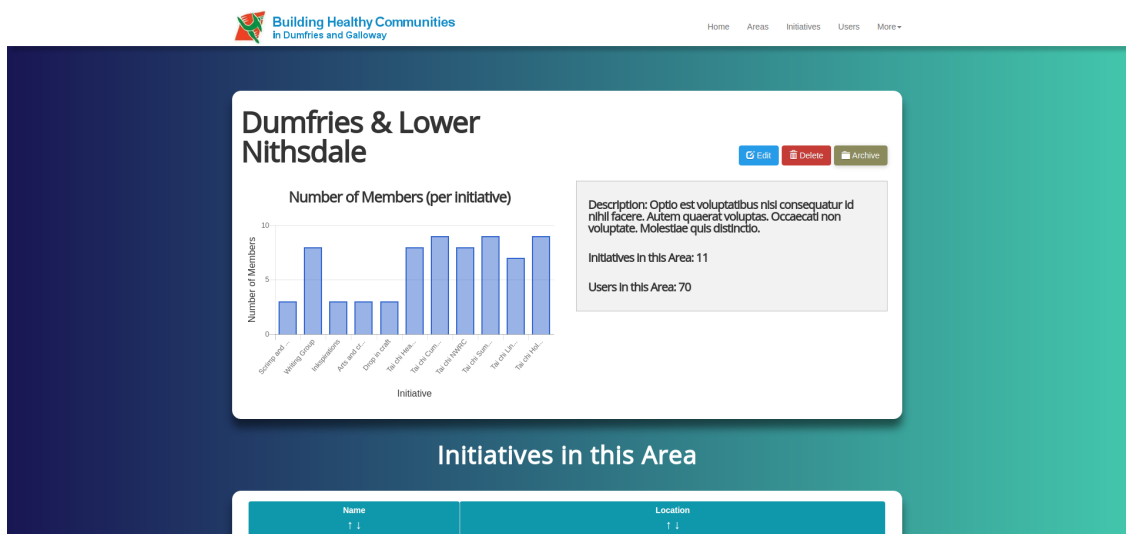


Figure 10: Area Main Page

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 11](#).

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](#)

**Update the area**

**Name**  
Dumfries & Lower Nithsdale

**Description**  
Optio est voluptatibus nisi consequatur id nihil facere. Autem quaerat voluptas. Occaecati non voluptate. Molestiae quis distinctio.

**Submit**

The Building Healthy Communities by TeamNH | Contact | Building Healthy Communities

Figure 11: Editing an area

### 6.3 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 12](#). 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](#).

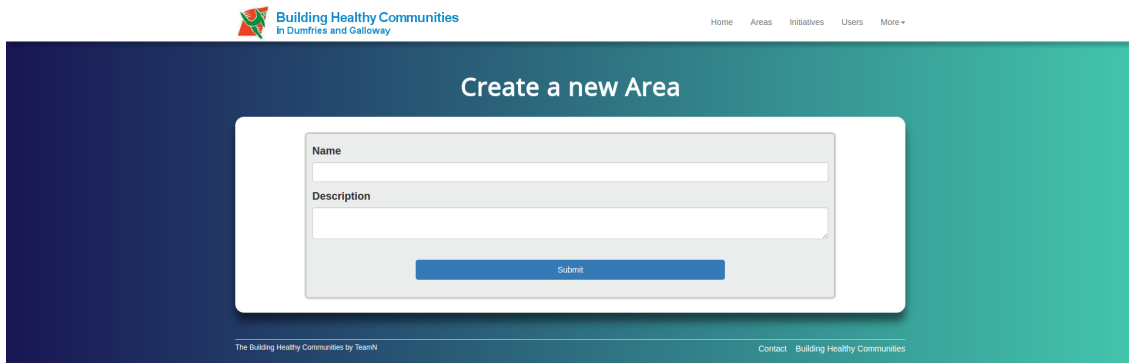
The screenshot shows a web interface for 'Building Healthy Communities in Dumfries and Galloway'. At the top, there is a navigation bar with links for Home, Areas, Initiatives, Users, and a More menu. The main heading is 'Create a new Area'. Below this is a form with two input fields: 'Name' and 'Description'. A blue 'Submit' button is positioned at the bottom of the form. The footer contains the text 'The Building Healthy Communities by TeamN' and a 'Contact' link.

Figure 12: Creating 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.

### 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 contains a third table, listing the funding the initiative receives.

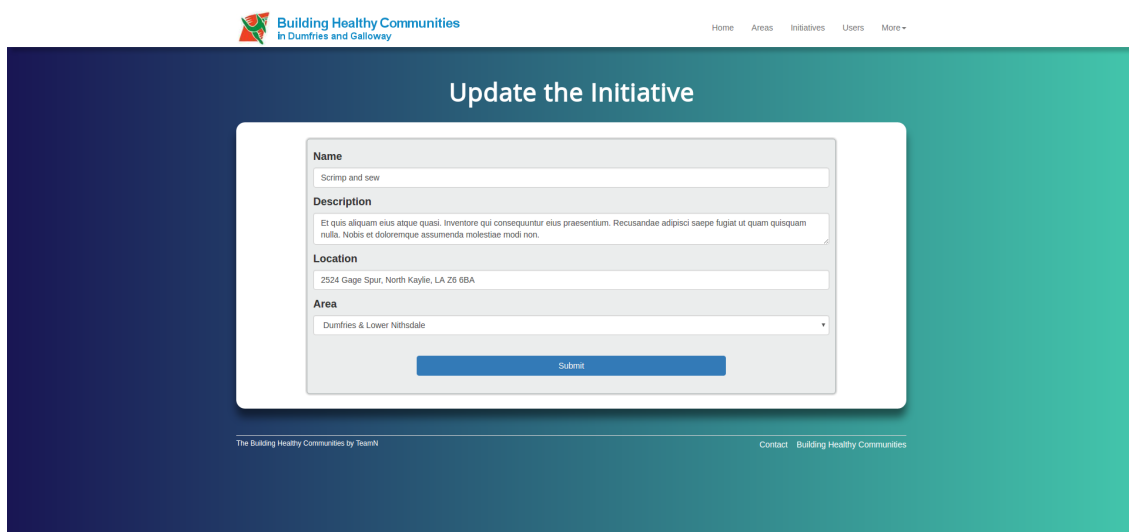
## 7.2 Editing, Deleting and Archiving

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 13](#).

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](#)



The screenshot shows a web application interface for 'Building Healthy Communities in Dumfries and Galloway'. The main heading is 'Update the Initiative'. Below this is a form with the following fields: 'Name' (containing 'Scrimp and sew'), 'Description' (containing placeholder text), 'Location' (containing '2524 Gage Spur, North Kaylie, LA 26 6BA'), and 'Area' (a dropdown menu with 'Dumfries & Lower Nithsdale' selected). A blue 'Submit' button is at the bottom of the form. The footer includes 'The Building Healthy Communities by TeamN' and 'Contact Building Healthy Communities'.

Figure 13: Editing an initiative

## 7.3 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.

## 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](#).

The screenshot shows a web application interface for 'Building Healthy Communities in Dumfries and Galloway'. The header includes a logo and navigation links: Home, Areas, Initiatives, Users, and More. The main content area is titled 'Create a new Initiative' and contains a form with the following fields: Name (text input), Description (text input), Location (text input), Area (dropdown menu with 'Dumfries & Lower Nithsdale' selected), and a blue 'Submit' button. The footer contains the text 'The Building Healthy Communities by TeamN' and 'Contact Building Healthy Communities'.

Figure 14: Creating an initiative

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 clicking the blue 'Remove funding' button.

## 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 15](#). 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.

The screenshot shows a web application interface for 'Building Healthy Communities in Dumfries and Galloway'. At the top, there is a navigation bar with links for 'Home', 'Areas', 'Initiatives', 'Users', and 'More+'. The main content area features a 'New Meeting' form. The form has a title 'New Meeting' and a descriptive paragraph: 'This is where new meetings can be arranged for *Scrimp and sew*. Please select the date and time you would like the next meeting to be scheduled for (note: the default is one week after the 'most recent' meeting. If the 'most recent' meeting is in the future, it will still be one week after that date). You can arrange for this meeting to run at the same time multiple weeks into the future by modifying the 'Weeks to run for' field.'

The form contains the following fields:

- Date:** A dropdown menu for the year (currently showing '2017'), a dropdown menu for the month (currently showing 'February'), and a dropdown menu for the day (currently showing '17').
- Time:** Two dropdown menus for the hour (currently showing '06') and minute (currently showing '03').
- Weeks to run for:** A dropdown menu (currently showing '1').
- Submit:** A blue button at the bottom of the form.

Figure 15: Creating a new session

## 8 Users

### 8.1 Profile

## 9 Medical Conditions

## 10 Questions

## 11 Funders

## 12 Meetings

## 13 Archives

## 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 16](#). 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.

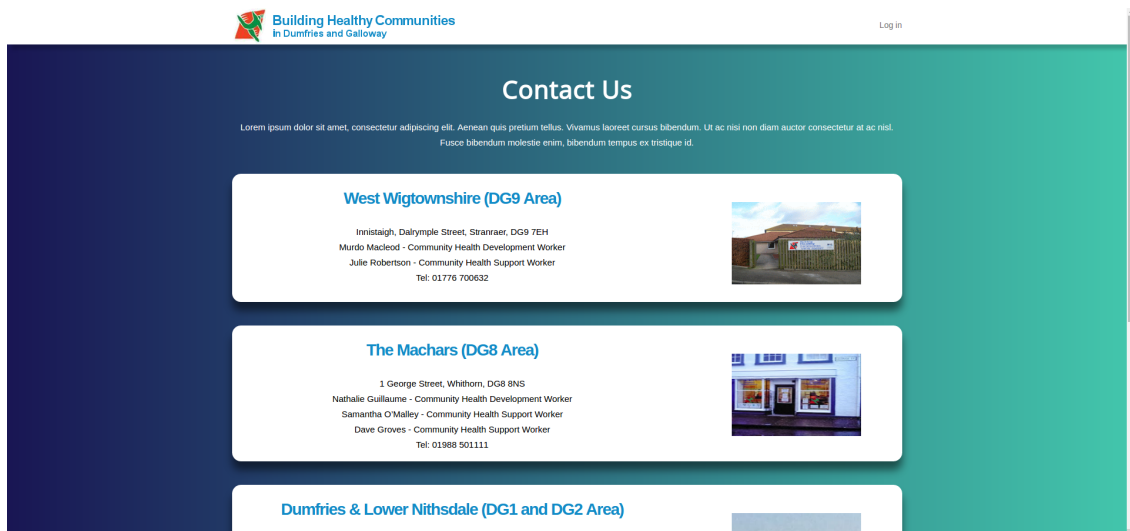


Figure 16: Contact page