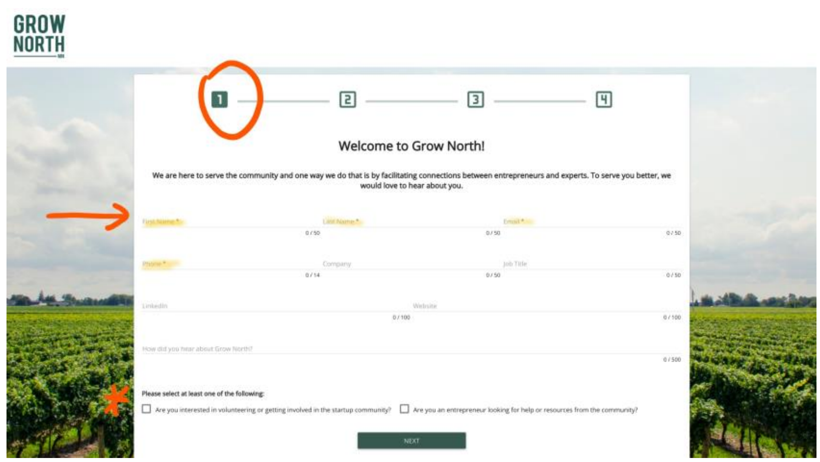
Grow North How-To Guide: Admin

Guest

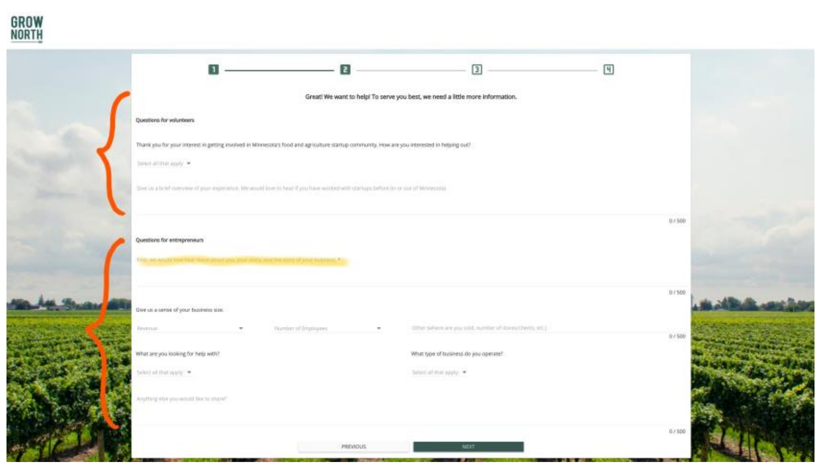
Overview
Guests that visit the website have access to a single page known as the Grow North Survey. The page acts as an intake form that Grow North uses to collect data from prospective volunteers and entrepreneurs. Upon submission, Grow North admins can review and make edits to the submissions before accepting them. However, one should ensure all selections and answers are accurate to prevent delays in receiving opportunities and resources from Grow North.

Accessing the site
- Follow link from Grow North Website (http://www.grownorthmn.com/)

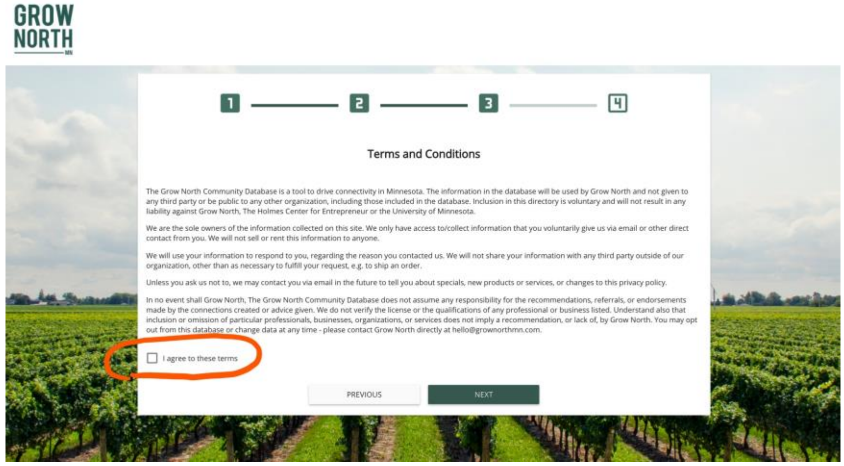
Using the form
- The form contains 4 main pages and a confirmation screen
- You can navigate between pages using the previous or next buttons or the progress bar
  - Invalid form entries will inhibit navigation until corrected
- Many input fields are optional, but any marked with an * (asterisk) must be completed
- Certain input fields have restrictions on what can be entered (email, phone, etc)
- If a required input field is left blank or invalid, you will be unable to proceed to the next page



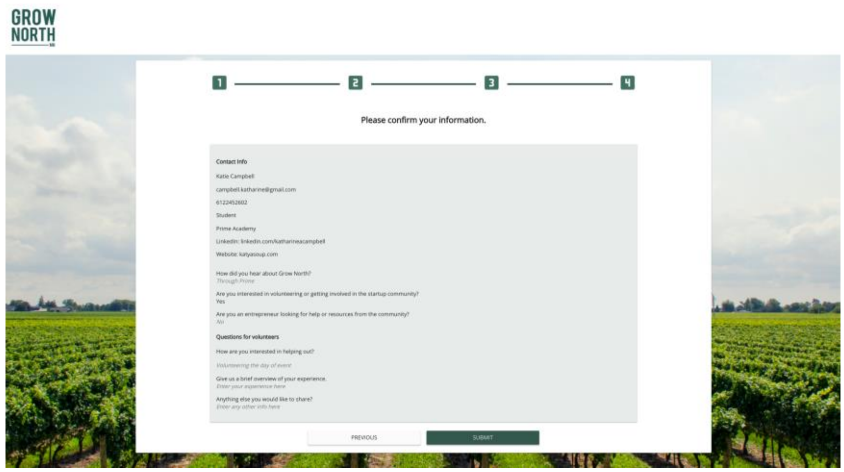
- The questions on page 2 are determined by your checkbox selections on page 1
- Some fields have special means of input
  - Dropdowns
  - Checkboxes
  - Dropdowns containing checkboxes



- The third page requires that terms and conditions are read, understood, then accepted



- The final page allows you to confirm your information
  - It is imperative that entries are accurate so that Grow North can effectively use the data



Admin

Overview

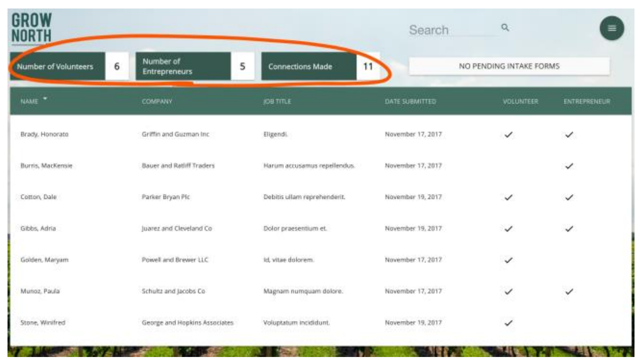
Admin can use the app to complete a variety of tasks via an administrative dashboard. They are able to review form submissions for accurate and legitimate information before approving them. After approval the listings appear in a directory, where the admin can search and sort entries. When an entry is clicked, a dialog box appears which organizes information in relevant tabs. The first tab contains contact information. The second has both contact info and survey responses with the option to edit both. The third tab contains a place for the admin to view, edit and add notes along with searchable tags. The fourth tab allows the admin to edit, add and track connections between clients. The dashboard also contains metrics including number of volunteers, entrepreneurs and connections. There is also a menu button which allows the user to navigate to the survey, edit admin account information and logout.

Accessing the app

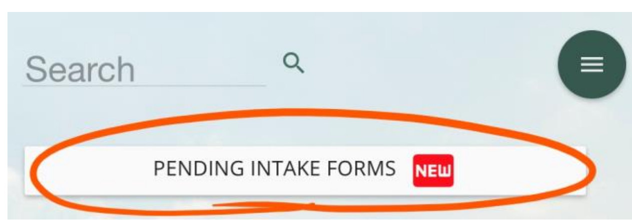
- App can be viewed in browser by going to: http://grownorth.herokuapp.com

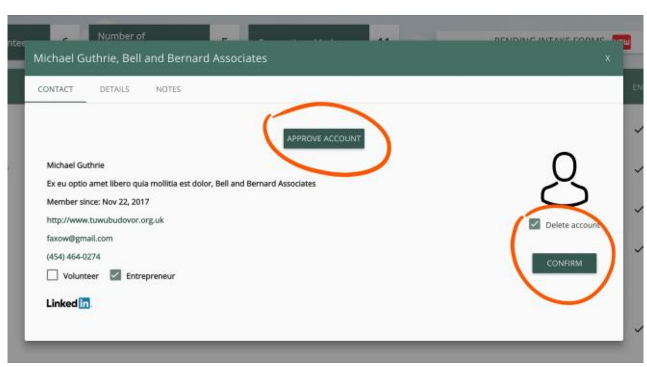
Using the app

- Metrics can be viewed in the top-left corner of the dashboard
- Metrics tracked include number of volunteers, number of entrepreneurs and number of connections.

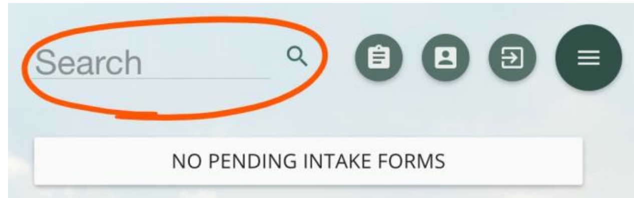


- Review and approve via the "pending intake forms" button located in the top right corner of the dashboard
- When pending forms are present, a red notification badge will appear
- Click on the button to display a list of pending forms
- Click on a listing to view the pending profile view where you can review and edit the listing
- The listing can be either deleted or approved and sent to the directory

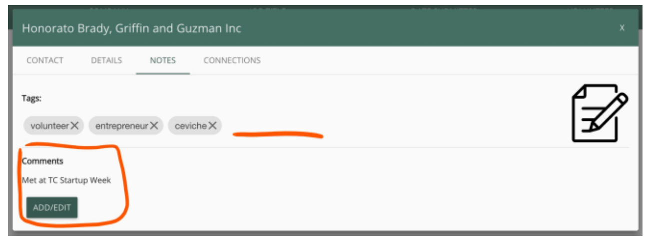


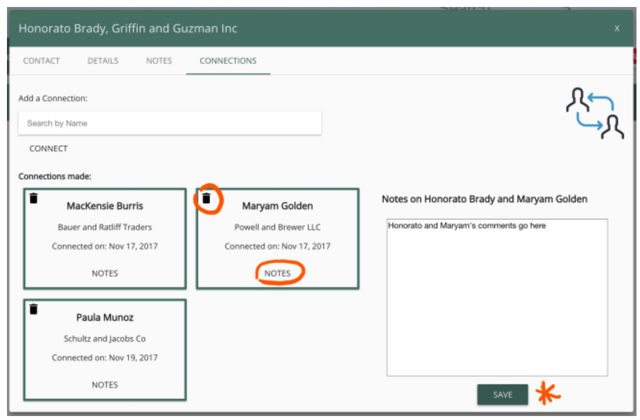


- Within the dashboard, a search bar is present in the top-right corner of the screen that instantly searches directory items.
- The search bar can be used to find entries based on their contact info and tags



- Clicking on a listing in the directory portion of the dashboard allows the admin to view and edit profile information in the following tabs:
  - Contact: contains contact card
  - Details: View and edit contact and survey info
  - Notes: View, add, edit and delete notes and tags
  - Connections: View, add, and delete tracked connections made between clients; View, add and edit notes for each connection





- Menu button located in top-right corner allows admin to perform the following actions:
  - Visit survey
  - Edit admin account
  - Logout