Safe Future Foundation Information System

User Manual

Introduction

Login

Logging in is reasonably standard for this application. Input your username and password and you will be given access to the appropriate portal(s). **If you do not have an account**, see an admin user and they can create one for you.
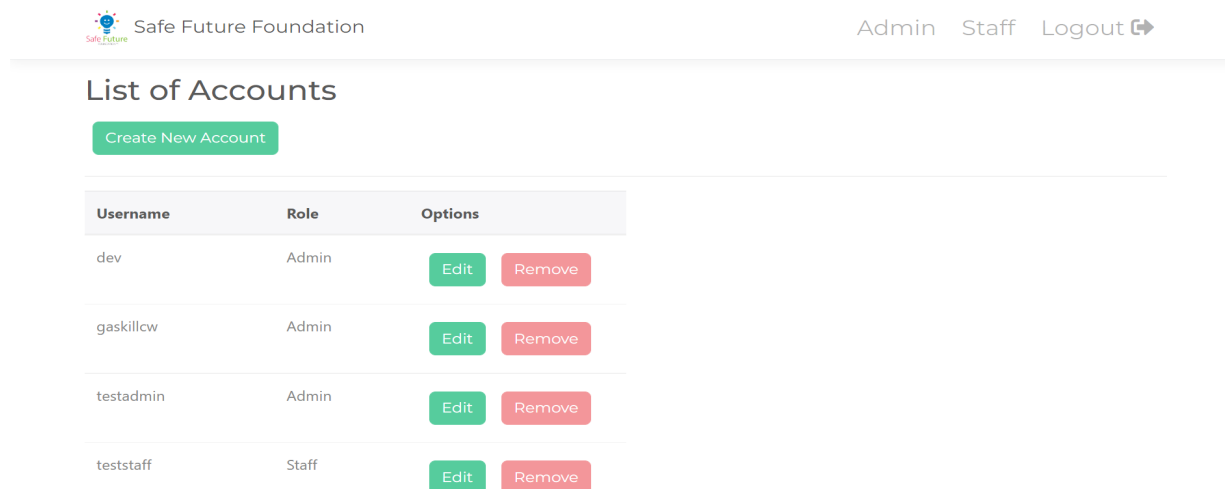
Administrator Portal
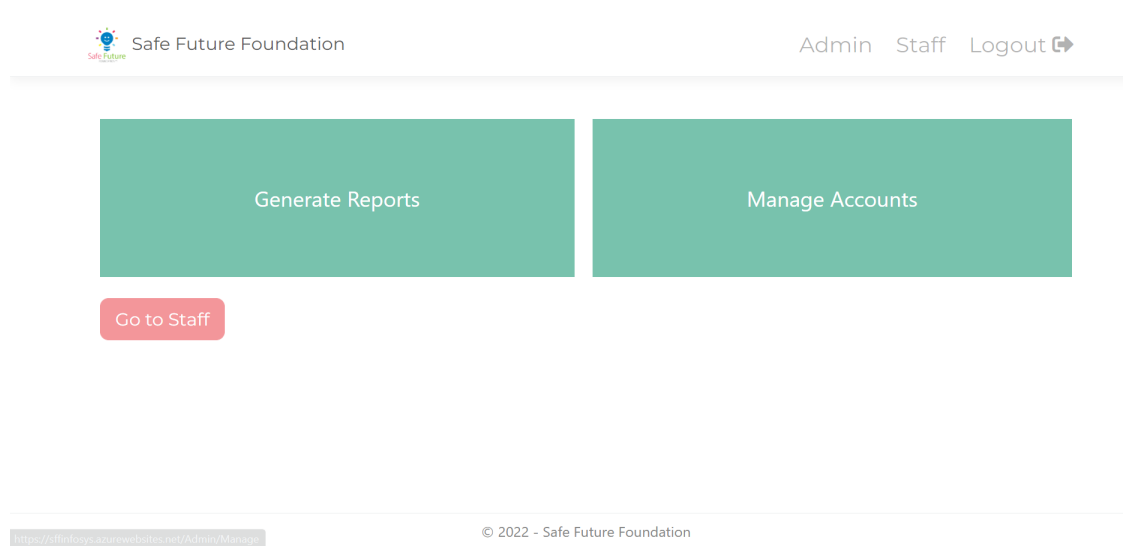
View of the Admin Portal

Manage Accounts

Select the "Manage Accounts" button on the Admin Portal page to create a new account, delete an account, or make changes to an existing account.

This will bring you to the List of Accounts as shown below.

View of the Manage Accounts Page

Creating a New Account

To **add** or **create** a **new account** you will click on the **green** button labeled, "**Create New Account**" button. Clicking this button will take you to a new page with a form to fill out. The form will contain the **required** fields: **Username**, **Password**, **Role**, **Security Question**, and **Answer**. It is important to note that the **Password** length must be 8 characters or more.

Once you have entered and selected the appropriate fields, you click on the **green** button located below the last field. The button is labeled, "**Create User**". A new account has now been created and can be used.

 If you would like to cancel the creation of this account, you can select the **red** button that is labeled, "**Back to Accounts**". The account has not been created.

View of the Create New User Account Form

Editing an Existing Account

To **edit** or **change** an existing account, click the **green** button located to the right of the desired account. The button is labeled, "**Edit**". It is important to select the "Edit" button located on the same **row** as the account that you want to edit.

Once clicked, you will be taken to the Edit Account form. From here you can change any or all of the fields: **Username**, **Role**, **Security Question**, and **Answer**.

To **save** the account with the changes you have made, you click the **green**, "**Save Changes**", button located at the bottom of the form. This has updated the account with the new changes.

To **cancel** the changes you have made to the account, click the **red**, "**Cancel Changes**", button located at the bottom of the form. This has not made any changes to the account.

View of the Edit Account Form

Deleting an Existing Account

To **remove** or **delete** an existing account from the list of accounts and the application, you click the **red** button on the row of the account you wish to remove. The button will be directly to the right of the "Edit" button and read, "**Remove**". Once clicked, the account will now be deleted and will no longer show on the list of accounts.

Generate Reports

First, select the **Generate Reports** button on the Admin portal (note: must be logged in as an admin user to access this feature).
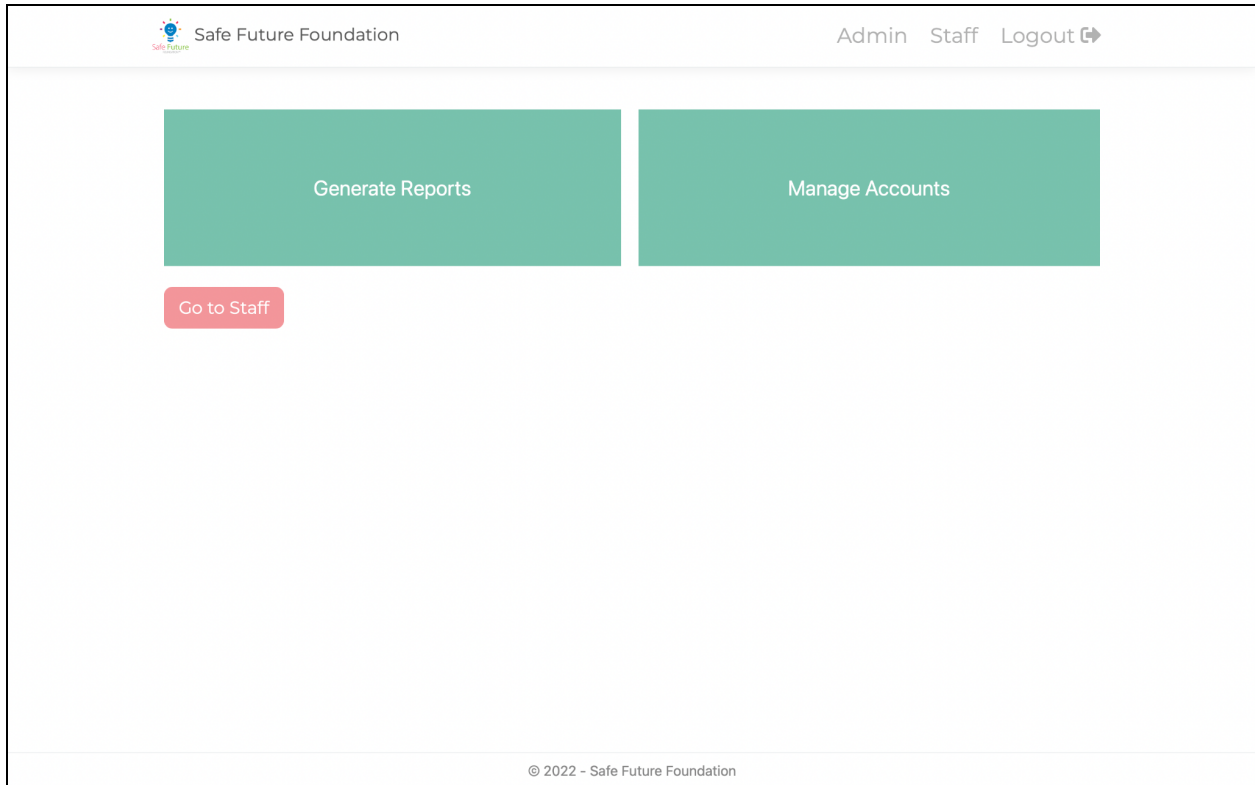
Once here, you may proceed in one of two ways to get your desired report:
1. Use a **Default Report** option, including weekly, monthly, and quarterly. These reports have their date ranges specified automatically so the user does not need to provide one. Weekly does the past 7 days, months does the past 30, and quarterly does the past 90.
2. Generate a **Custom Report**. For this option you must simply specify a date range by selecting a **from date** and a **to date**. After you have selected your range, select the **Generate Report** button and your newly created CSV file will be downloaded.

Generate Reports

Default Reports

[Weekly] [Monthly] [Quarterly]

Custom Reports

From: 05/02/2022 To: 05/02/2022

[Generate Report]

[Go Back]

Once your CSV file is downloaded to your device, open it with your favorite spreadsheet program such as Microsoft Excel, Apple Numbers, or Google Sheets (below is dummy data, not real recipient information).

2022-05-02_Report
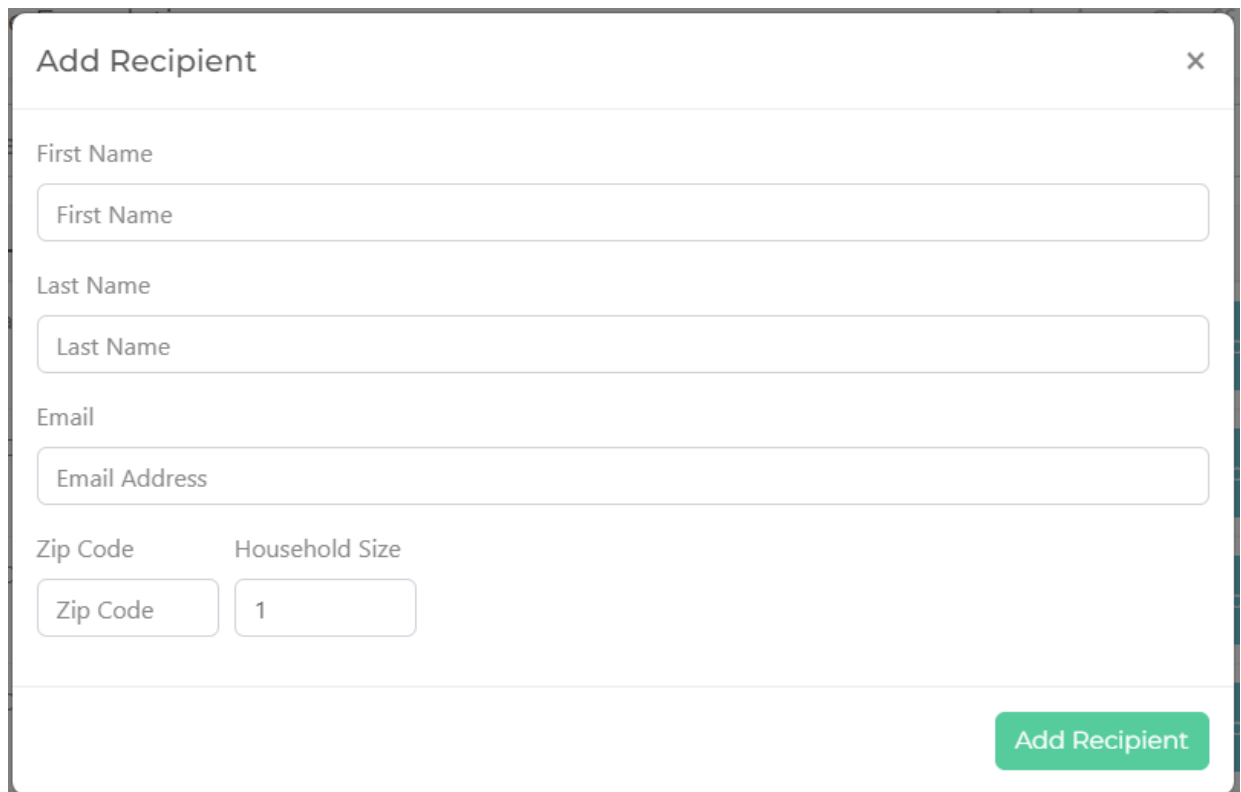
AttendanceId	EventDate	FirstName	LastName	Email	ZipCode	HouseholdSize	Notes
0858d0e0-126f-47a9-b138-016687b40f84	03/31/2022 15:25:44	Tetststw	afafafa		32245	4	x
af15fbd4-ca2c-4b55-9131-057ec4e8fb58	02/18/2022 23:16:58	Alex	Derby		32256	2	test
72c04e61-65c3-4f80-93ef-07251e3fa7ba	03/31/2022 15:16:25	Tetststw	afafafa		32245	4	p
c6c95511-6fe5-481e-b22a-158b27a49a29	03/31/2022 15:33:43	Tetststw	afafafa		32245	4	yyyy
356c8a03-6aca-4160-aed7-17e88fcac1c7	04/25/2022 20:48:19	Alex	Derby		32256	2	this is a test
dfd4fd5b-3a56-4387-9952-2a232d493b09	03/31/2022 14:55:42	Tetststw	afafafa		32245	4	t
03935994-1fde-4a43-b9fd-2c1cf6e08905	04/22/2022 17:49:13	Alex	Smith	fakeemail@fake.com	32224	2	D F
776a5d06-fa0c-4863-a834-31f34d4b14f3	03/31/2022 15:26:49	Tetststw	afafafa		32245	4	g
e42aa6a9-1c11-415c-a148-35cbc61fe52c	01/31/2022 22:27:40	Gordon	Freeman		87825	1	Had a aunt pick up supplies in stead
4b54d822-4622-4b16-a0fc-484d746a4f47	01/31/2022 18:35:44	Tetststw	afafafa		32245	4	Test note
b9c18faf-b3df-4d4c-bb28-4af4137669ef	03/31/2022 15:30:53	Tetststw	afafafa		32245	4	a
8c443e3f-610e-4287-9e6a-4ba4f516429a	03/31/2022 15:23:45	Tetststw	afafafa		32245	4	x
ee128738-2c98-4179-bb41-4ed7682747a6	03/30/2022 20:35:06	Tetststw	afafafa		32245	4	got stuff
c36807ea-34af-4bad-b2b7-58b9cfacb549	03/31/2022 15:33:34	Tetststw	afafafa		32245	4	q
9c64ad7d-9621-4e70-a037-5f069e291f7f	04/09/2022 14:30:49	Alex	Derby		32256	2	F d
fff0f52c-4a72-4eee-95c2-605b80f10d7f	03/31/2022 15:07:00	Tetststw	afafafa		32245	4	test
cee34656-3fec-476d-b485-618fb0f22bdf	03/31/2022 14:57:49	Tetststw	afafafa		32245	4	a
2563024a-2e44-491c-8da6-63c780cc9db8	04/24/2022 17:20:26	Alex	Derby		32256	2	D
ca3a597e-7934-4995-89e2-6d76367e9e04	04/29/2022 17:10:44	Billy	Joel		90210	1	test colt
7595a9d4-6719-47b2-9cbc-759744890d0a	03/31/2022 15:02:33	Bob	Ross		32097	1	y
6219d0d2-f777-46e5-8b63-772d3857c87b	04/29/2022 11:33:23	John	Smith		32246	3	diapers, produce, feminine products
2db9075f-3798-4a46-8768-862c5d3fc93b	03/30/2022 17:47:39	Tetststw	afafafa		32245	4	D
8bc5a946-93cc-4d17-8296-8640b142ab65	03/31/2022 15:35:20	Alexander	Evans		32224	4	got cool stuff
441066dc-406f-4885-babc-8a3389b01e93	03/31/2022 15:24:09	Tetststw	afafafa		32245	4	x
3fa39f8f-5f17-44f1-b8a7-8e6d3dfab7de	03/31/2022 15:12:54	Tetststw	afafafa		32245	4	r
9c753540-01be-4163-9333-96b7165f9455	03/31/2022 14:52:49	Tetststw	afafafa		32245	4	tss
9c6c12c3-3b6c-49f6-bf91-9d557b471381	03/01/2022 14:52:54	Alexander	Evans		32224	4	Test from modal
1d40c123-51ff-427c-8b90-b1a8e097e9c6	03/31/2022 14:53:59	Tetststw	afafafa		32245	4	test
a6a82eb4-76b1-4877-ba85-bad9d6c4c4a3	01/28/2022 23:07:28	Alex	Derby		32256	2	dfgdg

Staff Portal

Add Recipient

To **add** or **create** a **new recipient**, you click on the **green** button on the **bottom left** of the screen that says **"Add Recipient"**. When you click on that button, a **form** will pop up. The form will contain the fields: **First Name**, **Last Name**, **Email(Optional)**, **Zip Code**, and **Household Size**. After you complete all the **required** fields, you click on the **"Add Recipient"** button. A new recipient is now created and added to the database.

Search Recipients

When you first get to the **Staff** portal, a table with all the **past service recipients** is shown. In the table, there's information about **recipients**' **first name**, **last name**, **zip code**, and **household size**. On top of the table, there is the **Search Bar**, which you can use to search for past recipients. The search bar allows you to input text such as the recipient's **name**, or **last name**(it is not case sensitive), and after you click **Enter** or the **Magnifying Glass** on the **right**, recipients whose name matches the name entered will show up. In case the recipient **does not exist**, **no** names will appear when searching.
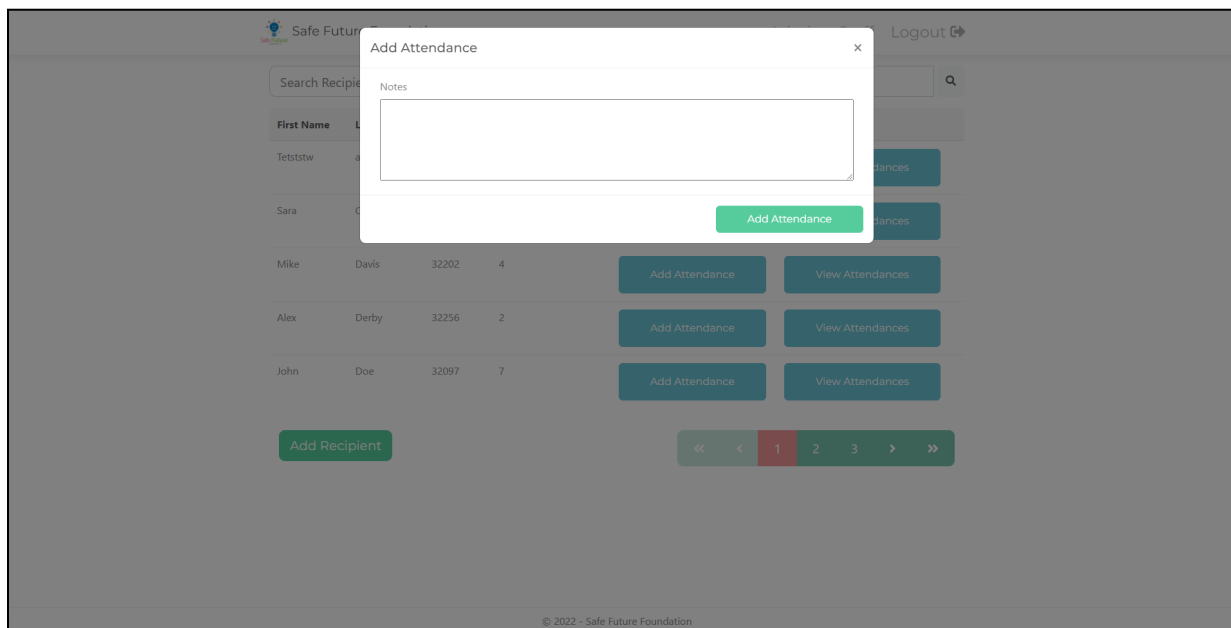
Add Attendance

Within the volunteer homepage is the list of recipients currently in the SFFIS database in an HTML table. Each row in the table consists of the basic information regarding a single recipient as well as buttons to view their attendances ("View Attendances") and log their attendance to an event ("Add Attendance").

To **log a new attendance** to an event for a recipient, search for the recipient in the search bar above the recipients table and locate them within the list.

Next, click the **Add Attendance** button in the row. A pop-up box should appear on screen with a text area to type any notes about that recipient's attendance (writing a note is not required).
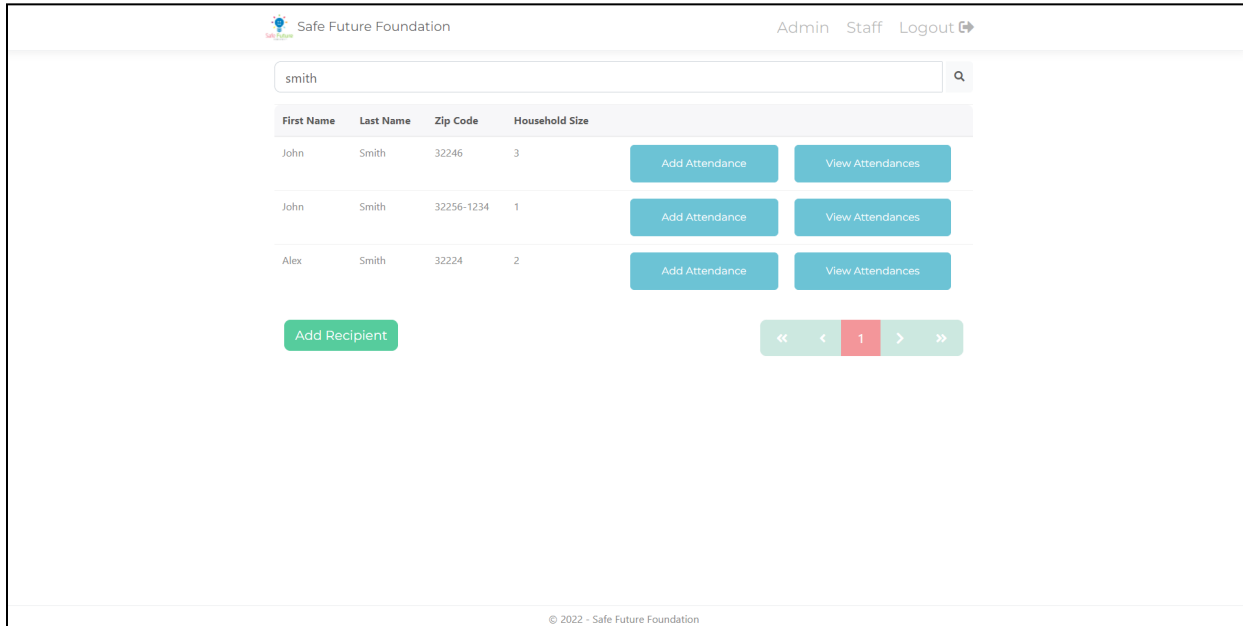

View of the Add Attendance popup

Finally, once any notes have been written, click the green **Add Attendance** button at the bottom right of the pop-up box. The pop-up box should disappear and the attendance added to the database. Any errors that may arise will display in a red alert above the Notes text area.

View Attendances

Within the volunteer homepage is the list of recipients currently in the SFFIS database in an HTML table. Each row in the table consists of the basic information regarding a single recipient as well as buttons to view their attendances ("View Attendances") and log their attendance to an event ("Add Attendance").

To view the attendances for a recipient, search for the recipient in the search bar above the recipients table and locate them within the list.
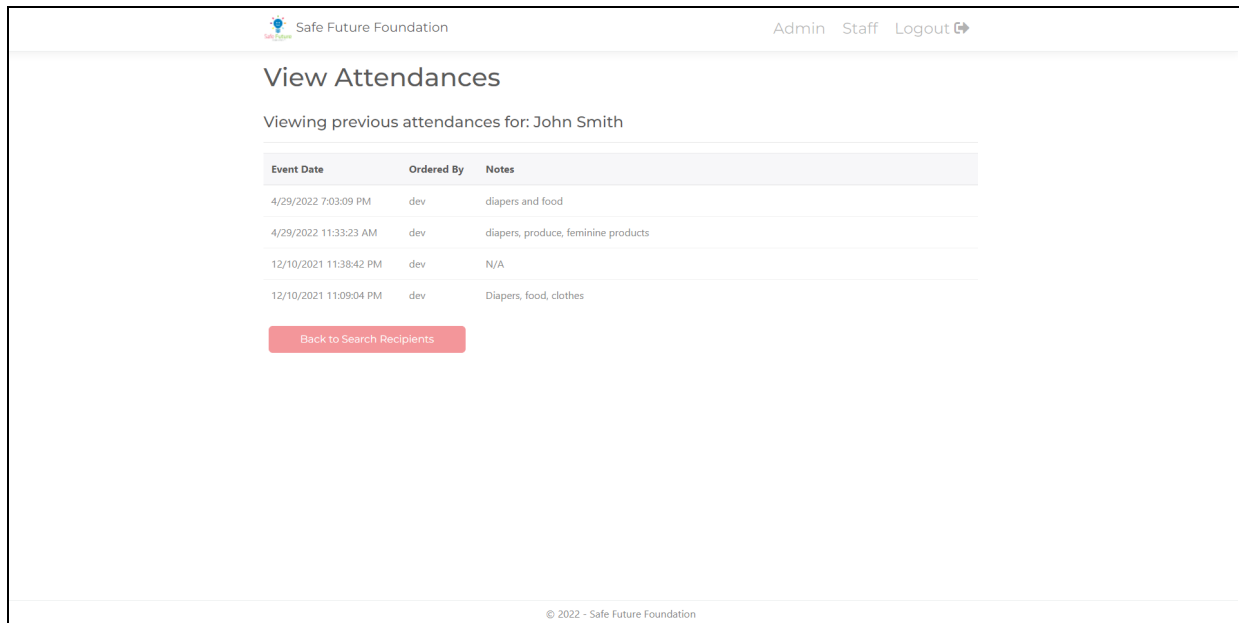

* Recipients in table

Next, click the **View Attendances** button in the row. You will be redirected to a new web page that displays a list of all attendances for that recipient within a table. To return to the homepage, either click the red **Back to Home** button at the bottom of the web page or the Staff link in the navigation bar at the top of the web page.

Event Date	Ordered By	Notes
4/29/2022 7:03:09 PM	dev	diapers and food
4/29/2022 11:33:23 AM	dev	diapers, produce, feminine products
12/10/2021 11:38:42 PM	dev	N/A
12/10/2021 11:09:04 PM	dev	Diapers, food, clothes

View of the View Attendances page

Logout

To log out of the application, click the **Logout** link in the navigation bar at the top of the webpage. This will sign you out of the application and redirect you to the **Login** page.
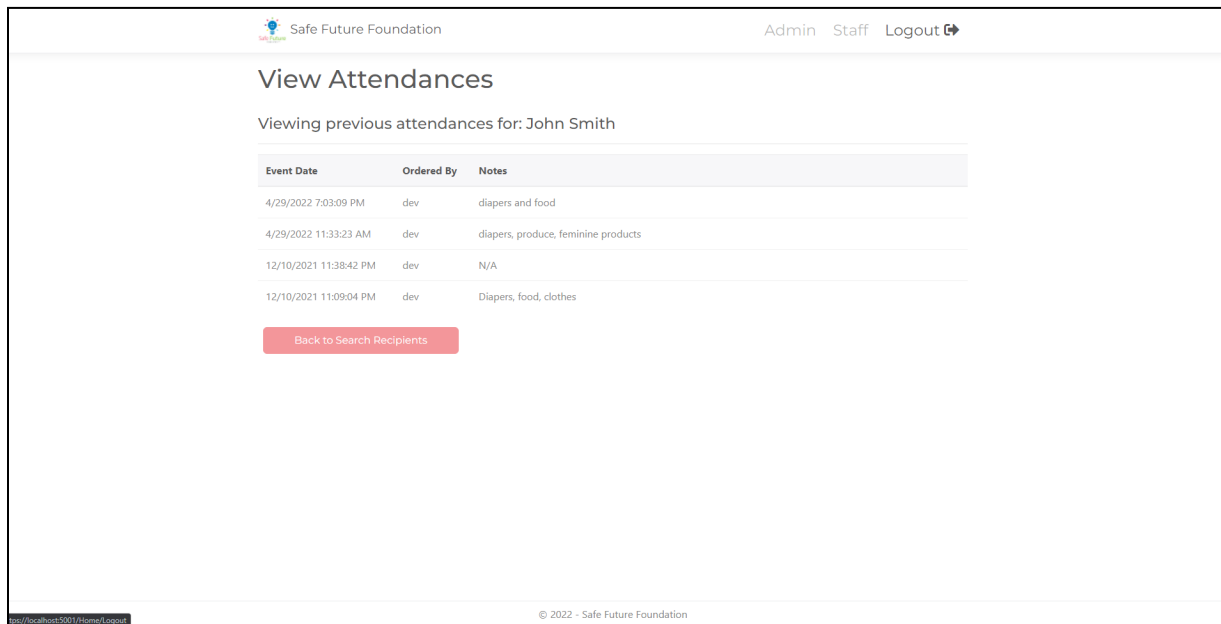
Logout link in the navigation bar, located at the top of the page

Password Recovery

In the event of a lost or forgotten password, the application gives users the ability to change their passwords by answering challenge question(s).
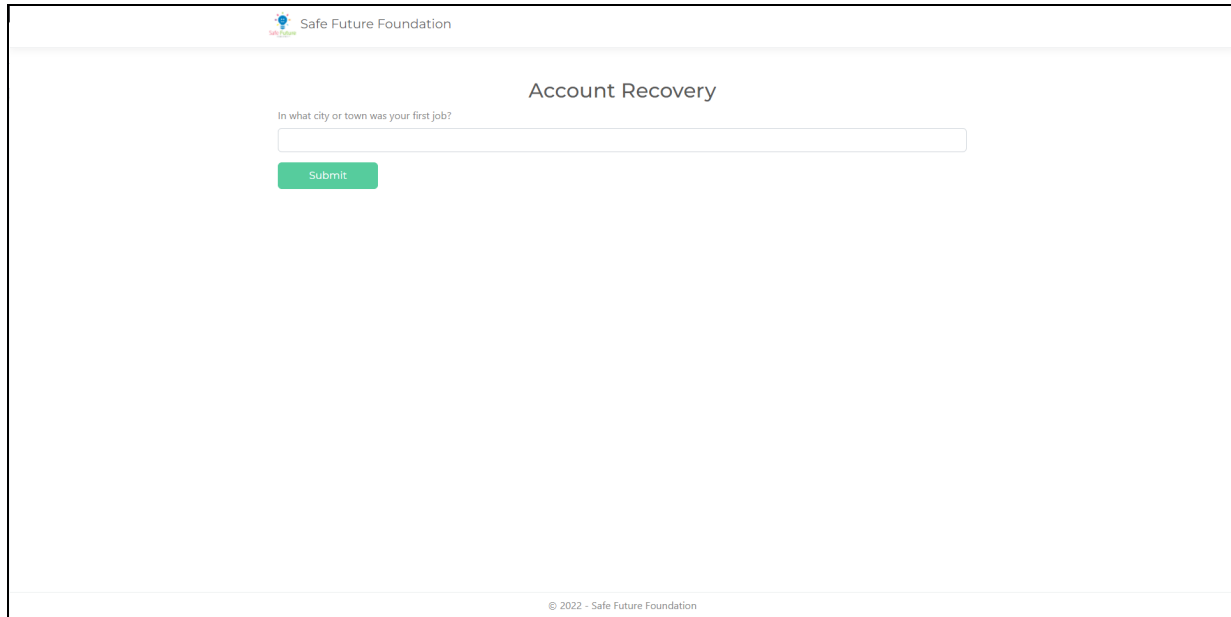
To change your password, click the Forgot Password? link located in the Login page, under the Password input field.

* Login page, highlighting the Forgot Password link under the Password field

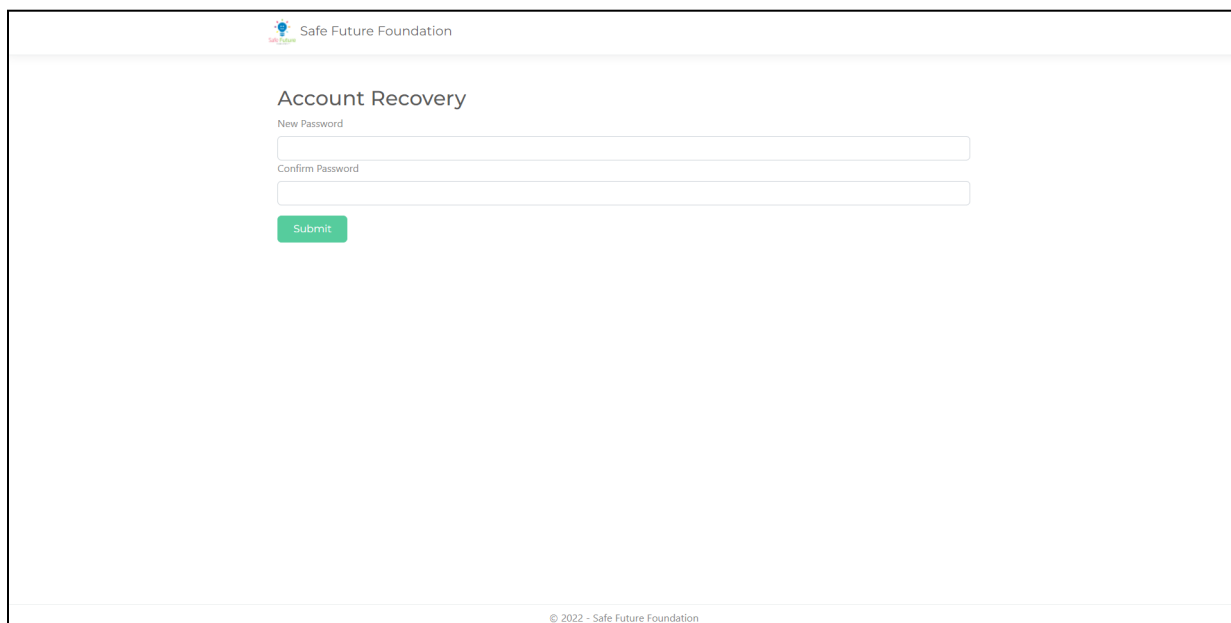Next, enter your username in the provided field

Upon entering your username, you will be asked the security question that you chose during the account creation process.

* View of the Account Recovery page where the user's security question is displayed

If you successfully answered your security question, you will be redirected to a page to enter in a new password.

* View of the New Password page where the user submits their new password

Once you enter your new password and submit the form, your password will be updated and you will be redirected to the home page.