Charity Portal User Guide

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# Installation

The instructions for installation and configuration of the Charity Portal can also be found in the Elaboration Report in the “Deployment Plan” section.

## Deploying the Website

This will depend on the hosting provider chosen, as each company will have specific tools and procedures for their product. Please consult any guides and tutorials provided by the hosting provider. All source code has been provided in a zip file and this can be directly uploaded to a hosting provider, or to an online git service depending on the client’s choice. For details on the files included in the source code see the “Program Design/Folder Structure” and Appendix A in this document.

Depending on the provider, you may need to build and start the portal – to do so;

1. Navigate to the “backend/” folder, and type **npm install** to install or update any required dependencies;
2. Type **node server.js** to start the backend service;
3. Navigate to the “frontend/” folder and type **npm install** to install or update any required dependencies; and
4. Type **npm start** to launch the front end / UI.

## Creating the Database

The database for the portal is MongoDB. There are two options for hosting the database, “self-hosting” using the same web-hosting service, or by using the MongoDB Atlas service. Official documentation for both options can be found at:

1. Self-Hosted MongoDB: <https://www.mongodb.com/products/self-managed/community-edition>
2. MongoDB Atlas: <https://www.mongodb.com/atlas>

For development and testing, a free-tier Atlas cluster was used.

Regardless of which hosting option is chosen, the following configuration steps should be the same:

1. Create a database
2. Find the MongoDB Connection String for your database (refer to MongoDB documentation for help: <https://www.mongodb.com/docs/manual/reference/connection-string/>)
3. Open the .env file located at **backend/.env** and enter the Connection String in the “MONGODB\_URI=” field  
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Figure 1: Environment file showing location of MongoDB Connection String

1. Save the changes to the .env file.
2. When **server.js** is started (see “Deploying the Website” step 4) an empty database will be created at the cluster specified by the connection string.
3. When the database is created it will generate new, unique IDs for the roles. Navigate to the “roles” collection in the database and copy the unique IDs and paste them into **frontend/.env** by the corresponding variable.A screenshot of a computer code

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Figure 2: MongoDB showing unique IDs for user roles

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Figure 3: Environment file showing location of user role variables.

# Configuration of External Services

These configuration instructions can also be found in the Elaboration Report in the section “Deployment Plan.”

## EventBrite API Credentials

1. Navigate to **backend/.env**
2. Paste your existing EventBrite API key to the “EVENTBRITE\_API\_KEY=” variable.
3. Configure userController.js to use live API results instead of mocked data used in development and testing.
   1. Navigate to **backend/controllers/userController.js**
   2. Uncomment the function “*getUserDataFromEventBrite*” (lines 7 thought 24)

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Figure 4: Function 'getUserDataFromEventBrite' to be uncommented in a live environment.

* 1. Comment out lines 49 though 51 in the “*saveAllUsersToDBFromMockFile”* function and uncomment lines 52 though 53 to use the “*getUserDataFromEventBrite*” function.  
     **Info:** The lines 49 though 51 are for mocking data from the EventBrite API and is only used for development and testing purposes. It is not required in a live environment and will conflict with the “*getUserDataFromEventBrite”* functionA screen shot of a computer code

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Figure 5: Function 'saveAllUsersToDBFromMockFile' to be modified in a live environment.

* 1. Save the file.

## Configuring Gmail API

In order to connect to Google’s APIs an account must be authenticated via OAuth 2. Most of the difficult work in connecting to Gmail is configuring these details on the Google account side. These instructions will cover how to configure an account to allow an application to send Gmail messages on its behalf via an API.

1. **Sending Account** – This will be the account from which you want the Gmail message to be sent from. This will be the existing Ottawa Tamil Sangam account.
2. **Access Account(s)** – These are accounts which have been permitted access to the APIs for the Sending Account.

### Configuring Google OAuth for the Sending Account

1. Go to <https://console.cloud.google.com/> and log in as the Sending Account
2. Create a project. A “Project” is a way of grouping access permissions to the account (If you already have a project you wish you use, select that from the list, otherwise click “New Project”  
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Figure 6: Creating a new project in Google's cloud console.

1. Enter a Project Name and click Create
2. Navigate to the OAuth consent screen (menu/APIs & Services/OAuth consent screen)  
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Figure 7: Navigating to OAuth consent screen

1. Select “External” and click Create  
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Figure 8: OAuth consent screen user type selection

1. Fill in “App name” (an identifiable name for the app / project connecting to this account), a “User support email”, and “Developer contact information”. Other fields are optional. Click “Save and Continue”  
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Figure 9: OAuth consent screen configuration

1. Default scopes are Ok for our purposes. Click “Save and Continue”
2. **For Testing Purposes** Add test users (When using the testing status credentials will be revoked after 7 days.) Add the Sending Account’s email address. Click “+Add Users”, and add this account. Click “Save and Continue”   
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Figure 10: OAuth consent screen adding test users

1. **Publish App**. To make the tokens permanent, you may click “Publish App” now, or return to the “OAuth consent screen” and push it at any time. This will prevent the tokens generated in later steps from expiring.   
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Figure 11: OAuth consent screen publishing app

Based on this configuration the app will not need to be verified, and should be available immediately (or within a few minutes if you return to this page to publish.)

1. Review the summary and click “Back to Dashboard”
2. Navigate to menu/Credentials/+Create Credentials/OAuth client ID  
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Figure 12: Navigating to OAuth client ID

1. Select “Web Application” from the dropdown menu and enter a descriptive Name for the OAuth client. Under “Authorized redirect URIs” click “+ Add URI” and enter: <https://developers.google.com/oauthplayground> . Click “Create”  
     
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Figure 13: Creating an OAuth client

1. This has created an OAuth client, with “Client ID” and “Client secret” displayed. Copy both of these values for later (This information can be found later by clicking on the OAuth client from the list of credentials in the dashboard.)

### Configure Redirect URI

1. Navigate to <https://developers.google.com/oauthplayground>
2. Click the Gear-Icon and check the box for “Use your own OAuth credentials”. Enter the OAuth Client ID and OAuth Client Secret from Step 13 above. Click “Close”  
   A screenshot of a computer

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Figure 14: Configuring OAuth credentials

1. Under “Step 1” select the scope for the API. For our use we will use the default Gmail API. In the field at the bottom enter <https://mail.google.com/> or navigate through the list to “Gmail API v1/https://mail.google.com/”. Click “Authorize APIs”  
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Figure 15: Selecting Google APIs

1. Select the Sending Account from the confirmation screen and click though.
2. In Step 2 click “Exchange authorization code for tokens” to generate Refresh and Access tokens.   
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Figure 16: Creating refresh tokens

The access and refresh tokens can also be found in the “Refresh/Response” body.  
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1. Navigate to **backend/.env** and add the details for:
   1. CLIENT\_ID
   2. CLIENT\_SECRET
   3. REDIRECT\_URL
   4. REFRESH\_TOKEN
   5. SENDING\_ADDRESS

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Figure 17: Entering Gmail API details in the .env file

# Administrator Actions

These actions can only be performed by a user who is logged in to an account which has been given the Administrator role.

## Managing Members

### Filtering Member Table

1. Navigate to “Management/Members” in the top navigation bar.   
   A close up of a sign

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Figure 18: Navigating to Member Management Table

1. The user table can be searched and sorted using the option button (3 vertical dots) in the header of each column. Select the option button next to any column heading and select “Filter by…” to display the search field.   
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Figure 19: An example of using "Filter by First Name"

1. Enter a search string in the field and the table will return only records which match. The “Filter by…” option can be used in multiple columns at once to narrow down a record. To cancel this filtering select the “x” to the right of the search field.   
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Figure 20: An example of filtering by Email and First Name fields.

### Editing a User Role

1. Select the options button in the “Action” column of the record you wish to edit and select “Edit”  
   **Note:** Accounts which are inactive (i.e. do not have a current paid membership) will not have this option at this time.  
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Figure 21: Editing a user

1. Select the “Roles” field and click on the names of roles to be added or removed from the user. Roles which the user has are highlighted.   
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Figure 22: Selecting member's roles

1. Click the “Update” button to confirm the changes.

### Deleting a User

1. Select the options button in the “Action” column of the record you wish to delete and select “Delete”  
   **Note:** Accounts which are inactive (i.e. do not have a current paid membership) will not have this option at this time.  
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Figure 23: Selecting a user to delete

1. Follow the instructions and type “DELETE” (case sensitive) to confirm the deletion. The “Delete” button will now be available, click on it to finalize the deletion.   
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Figure 24: Confirming deletion of a user

## Managing Volunteers

### Filtering Volunteers Table

Volunteers can be sorted based on the event they are volunteering for and the role they will be performing.

1. Select the options icon next to “Event” and select “Filter by Event” to bring up a search box.   
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Figure 25: Selecting column to filter by

1. Enter a search term (i.e. the name of the event you want to search by) to show only volunteers who have registered for that event.   
   **Note:** Individuals who have volunteered for multiple events are shown in this table as separate volunteer records  
    A screenshot of a video game

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Figure 26: Filtering to show only events containing the word "Final"

1. These results can further be filtered by entering search terms in other columns such as “Role”

### Changing a Volunteer’s Role

1. Select the options icon from the Action column of the record you wish to edit, and select “Edit”  
   A screenshot of a computer

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Figure 27: Selecting to edit a volunteer

1. Select the Role field and select a new role from the dropdown menu.   
   **Note:** A volunteer can only have one role at a time.   
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Figure 28: Selecting a new role for a volunteer

1. Click “Update” to confirm the change.

### Deleting a Volunteer

**Note:** An individual can volunteer for multiple events at once and is recorded as a separate record in this table for each event. Deleting a volunteer will remove them from **that event only** and they will still be registered as a volunteer for other events.

1. Select the options icon from the Action column of the record you wish to delete, and select “Delete”  
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Figure 29: Selecting to delete a volunteer

1. Follow the instructions and type “DELETE” (case sensitive) to confirm the deletion. The “Delete” button will now be active, and clicking it will finalize the deletion.   
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Figure 30: Confirming deletion of a volunteer

## Communication

### Emailing Volunteers of an Event

All volunteers can be contacted via the OTS Gmail account directly from the OTS Portal on a **per event** basis. Individuals can also be manually added or removed from any communications prior to sending.

1. Navigate to “Management/Volunteers”  
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Figure 31: Navigating to Volunteer Management

1. Click “Notify Volunteers”
2. From the “Event” menu select the event who’s volunteers you wish to contact. This will pre-fill the “To” field in the form. Addresses can be manually added or removed from this field.
3. Enter a “Subject” which will be the subject line of the email.
4. Write an email in the text box. It is capable of rich text formatting (including imbedded links) and you can attach images by clicking the picture icon in the bottom right of the menu icons.  
   A screenshot of a email

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Figure 32: Drafting an email and selecting options

1. Click “Send Email” to send the message to the email addresses specified in the “To” field. You should see a confirmation message if it was successfully sent.   
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Figure 33: Confirmation that message was sent successfully

### Creating a News Post and Email

Creating a news post allows administrators to post information to the website and simultaneously send it via email to members based on their roles. When creating a post and selecting roles, this will also set the visibility of the post (i.e. individuals who do not have that role will not be able to see it.) A post with no roles selected is visible to everyone and is also displayed on the front page (if it is one of the latest posts.)

1. Navigate to “News”
2. Select “Add News”
3. Select the roles you wish this post to be visible to. You may select multiple roles for a single post. Selecting these roles will pre-fill the “To” field with members who have these roles. You may also add or remove email addresses to this field.   
   **Note:** If a member has multiple roles they will only be sent the email once.   
   **Note:** You may delete all emails from the To field and enter a “dummy” email if you do not wish to email this post, but would like it posted to the Portal with visibility to the selected roles.
4. Write an email in the text box. It is capable of rich text formatting (including imbedded links) and you can attach images by clicking the picture icon in the bottom right of the menu icons.   
   **Note:** You may optionally include an image with the post, but if one is not used a default one will be used when posting to the portal.   
   A screenshot of a social media post

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Figure 34: A sample news post showing options.

1. Click “Send and Save” to send the post to all users in the “To” field, and post it to the News section.

### Editing a News Post

1. Navigate to the “News” section and find the post you would like to edit.
2. Select the options icon (3 vertical dots) in the top right corner of the card and click “Edit”  
   **Note:** Only administrators will see this option. If you do not see it make sure you are logged in to an account with the Administrator role.   
   A screenshot of a message

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Figure 35: Selecting a news post to edit

1. Make the desired changes to the post. You may change the visibility of the post by adding or removing roles, you may email (or re-email) it to the addresses in the “To” field, and you may change the content of the Subject and Body of the post.   
   **Note:** You may make the post public by removing all the selected roles.   
   A screenshot of a social media post

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Figure 36: Editing a news post

1. Click “Send Email” if you would like the updated post to be emailed to ALL address in the “To” field. If you do not wish to email these updates, ignore this step.
2. Click “Save” to save the changes to the post displayed on the portal.   
   **Note:** To send the updated post as an email AND update it on the website, you will need to click both “Send Email” and “Save”.

### Deleting a News Post

1. Navigate to the “News” section and find the post you would like to delete.
2. Select the options icon (3 vertical dots) in the top right corner of the card and click “Delete”  
   **Note:** Only administrators will see this option. If you do not see it make sure you are logged in to an account with the Administrator role.   
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Figure 37: Selecting a news post to delete

1. Type “DELETE” (Case sensitive) to confirm the deletion. This will activate the “Delete” button. Click this to finalize the deletion.   
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Figure 38: Confirming deletion of a news post