

# Meals on Wheels Portal



## User Manual

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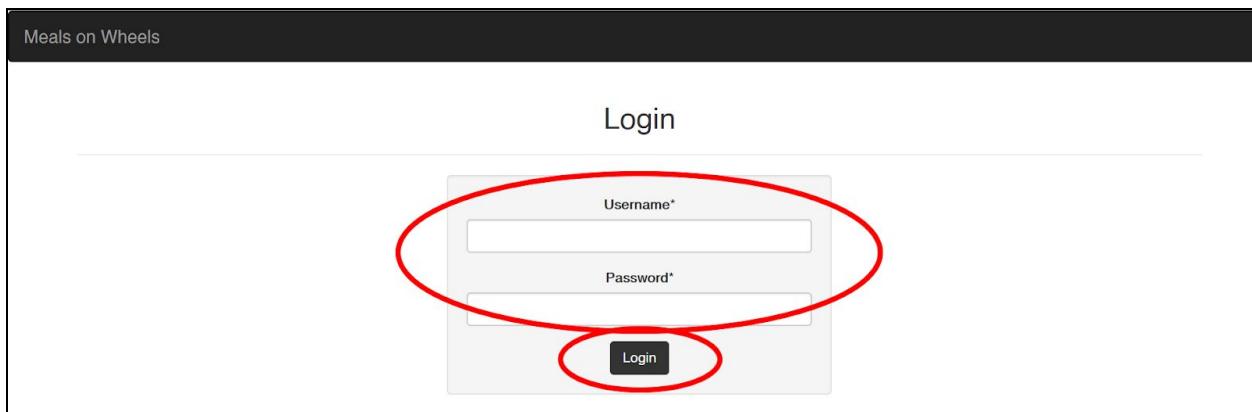
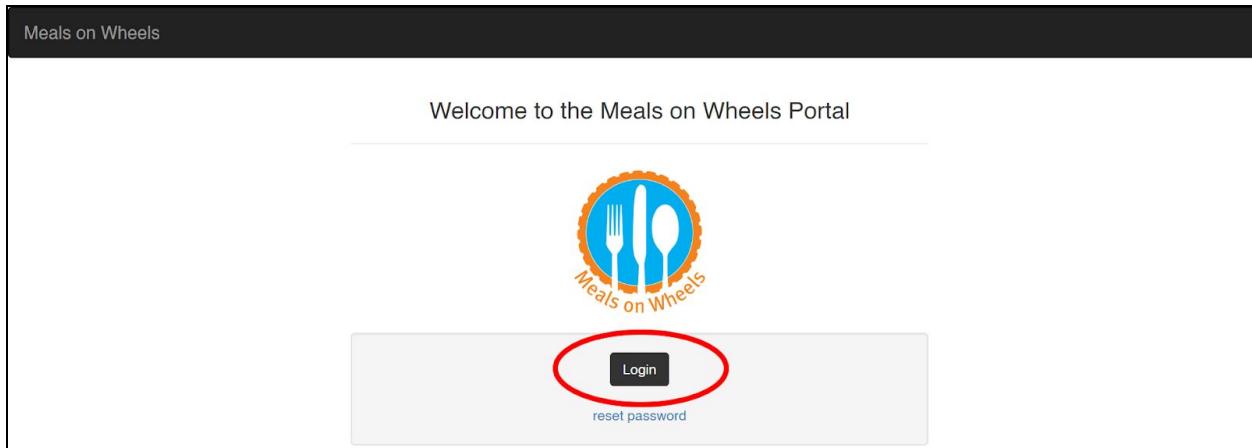
# Introduction

This user manual is designed for Meals on Wheels staff and volunteers that will use the new online web portal at <https://portal.cvillemeals.org/>. This system is designed to assist the internal organization of Meals on Wheels, and was designed specifically for Meals on Wheels of Charlottesville. The system was designed for customer data management, route ordering and management, report generation, and volunteer information and route coverage. The system also incorporates a volunteer portal in which volunteers can manage their jobs and substitutions. This portal was deployed in March, 2020. Note that the portal is designed to be used on the Google Chrome browser. Other browsers (including Safari, Internet Explorer) do not support all of the features (such as date pickers).

# Authentication and Access

## *Logging In*

Both staff members and volunteers can log into the portal using the account created by a staff member (see [Create Volunteer](#)). Click the “Login” button and enter in your username and password. The portal will redirect you to the appropriate version of the site (Staff/Volunteer) upon authentication.



## *Resetting Your Password*

If a user has forgotten their password, they can reset it by following the “reset password” link at the bottom of the login page. After entering their email address into the following screen, an email will be sent providing a unique link to a page that will allow them to enter a new password (see sample email below).

## Section 1: Authentication and Access

*Note: Volunteers created by staff on the portal will automatically receive an email to reset their password upon creation of their account. They will receive a slightly different “welcome email” with a link to take them to the same next step of the reset process.*

Meals on Wheels

Welcome to the Meals on Wheels Portal



Login

reset password

Meals on Wheels

### Forgot your password?

Enter your email address below, and we'll email instructions for setting a new one.

Email\*

Send me instructions!

Meals on Wheels

### Check your inbox.

We've emailed you instructions for setting your password. You should receive the email shortly!

Return to login

The screenshot shows an email from testmowcville@gmail.com to me. The subject is "Password reset on 127.0.0.1:8000". The body of the email includes a message about password reset, a link (<http://127.0.0.1:8000/accounts/reset/Mg/5f1-1b8646c019e63aedacbc/>) circled in red, and a note about the username.

You're receiving this email because you requested a password reset for your user account at [127.0.0.1:8000](http://127.0.0.1:8000).  
Please go to the following page and choose a new password:  
<http://127.0.0.1:8000/accounts/reset/Mg/5f1-1b8646c019e63aedacbc/>  
Your username, in case you've forgotten: my\_username  
Thanks for using our site!  
The [127.0.0.1:8000](http://127.0.0.1:8000) team

*"Reset password" email*

The screenshot shows an email from testmowcville@gmail.com to me. The subject is "[ACTION REQUIRED] Welcome to the Meals on Wheels of Charlottesville". The body of the email includes a greeting, a note about references, a portal URL, a password reset link circled in red, and a thank you message.

[ACTION REQUIRED] Welcome to the Meals on Wheels of Charlottesville.  
testmowcville@gmail.com  
to me  
Hello New Volunteer!  
Welcome to Meals on Wheels of Charlottesville/Albemarle! Your references have been checked and you are ready to start v  
allow you to pick up a substitute route, and will also allow you to see where routes are located.  
[portal.cvillemeals.org](http://portal.cvillemeals.org)  
Please follow the link below to reset your password in order to log in to the portal. If you have any questions, please e  
<http://127.0.0.1:8000/accounts/reset/Mg/5f1-b55f27bb538a836fd0d7/>  
Thank you and we look forward to working with you!  
Meals on Wheels of Charlottesville/Albemarle Team  
Thank you all for your hard work, we very much appreciate it!  
  
Reply Forward

*"Welcome" Email with password reset link*

After the user follows the link in either email, they will be presented with the following page, where they have the option to set a new unique password. After confirming their new password and pressing “Change my password,” they will be presented with a confirmation screen that their password has been reset. Pressing “Go to Login Page” will redirect the user back to the login screen where they can log in to the portal with their new password.

Meals on Wheels

### Set a new password

New password\*

Your password can't be too similar to your other personal information.  
Your password must contain at least 8 characters.  
Your password can't be a commonly used password.  
Your password can't be entirely numeric.

New password confirmation\*

**Change my password**



Meals on Wheels

### Password reset complete!

Your new password has been set.

**Go to Login Page**



# Staff

## Announcements

Announcements are the first thing staff and volunteer users see when they first log into the portal. These serve as bulletin messages for all users.

### *View Announcements*

In order to view current announcements, a staff user must navigate to the home page by either logging in or by clicking “Meals on Wheels” in the far left of the navigation bar. Current announcements will appear under the “Announcement” header.

The screenshot shows the top navigation bar with links: Meals on Wheels, Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and Logout. Below the navigation bar, there is a large white box titled "Announcements". Inside the box, there are two announcement posts. The first post reads: "Meals on Wheels is in need of applesauce donations." It was posted on April 11, 2020, and has a "Delete" link. The second post reads: "Volunteers: Please do not eat the food you should be delivering." It was also posted on April 11, 2020, and has a "Delete" link. In the top right corner of the "Announcements" box, there is a small button labeled "Create an Announcement".

### *Create an Announcement*

In order to create a new announcement viewable to both volunteer and staff users, a staff user should navigate to the home page by clicking “Meals on Wheels” in the top left of the navigation bar. Next, the user should click the “Create an Announcement” button, located in the top right of the screen underneath the navigation bar.

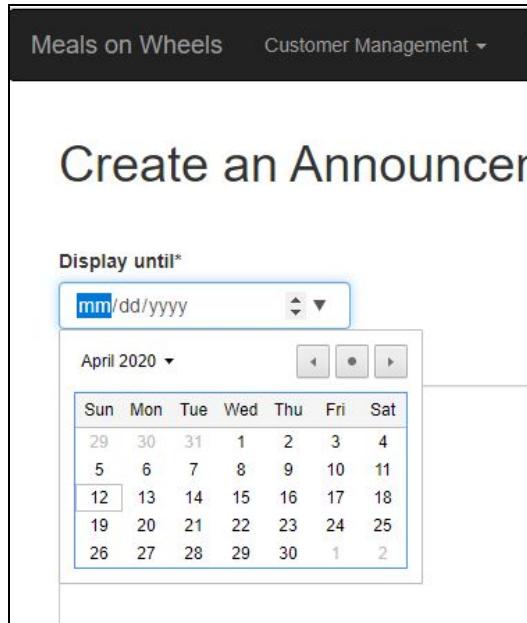
The screenshot shows the same layout as the previous one, but with a red oval circle highlighting the "Create an Announcement" button in the top right corner of the "Announcements" box. The rest of the page content is identical to the previous screenshot.

This will navigate the user to the “Create an Announcement” page, where the user will enter a date that the announcement is to be displayed until and the message body of the announcement.

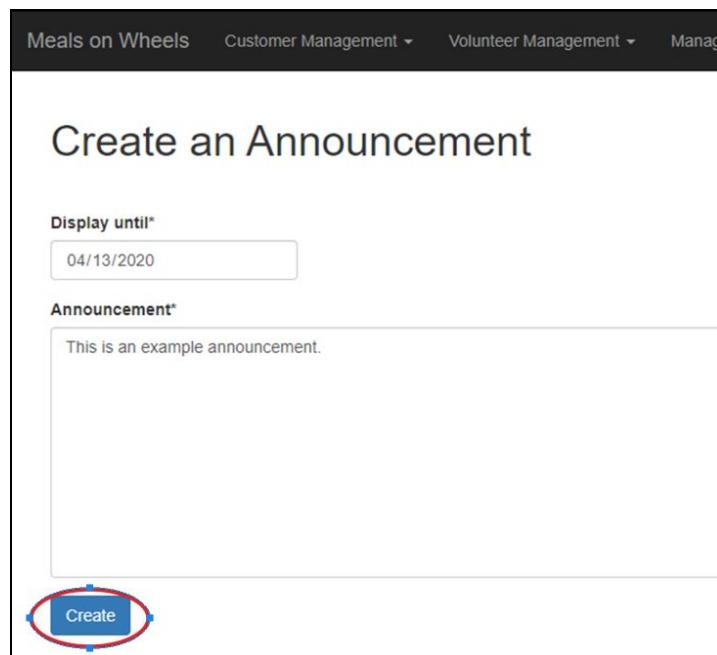
The screenshot shows a web page titled "Create an Announcement". At the top, there is a navigation bar with links: Meals on Wheels, Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and Logout. Below the title, there are two input fields: "Display until\*" and "Announcement\*". The "Display until\*" field is a date input field with placeholder text "mm/dd/yyyy". The "Announcement\*" field is a large text area for entering the message body. At the bottom left, there is a blue "Create" button.

In the “Display until” field, the user can either enter a date in the format “mm/dd/yyyy” or by manually selecting a date using the date picker dropdown menu. In order to use the date picker dropdown menu, the user must click the downward-facing triangle, and then select a date from the calendar.

*Note: This web portal is designed for the Chrome Browser. Safari does not support these date pickers.*



After selecting a display until date and typing in the announcement body, the staff user must click the blue “Create” button to make the announcement live. If the “Display until” date is in the past, then the announcement will not appear for any users.



### Delete an Announcement

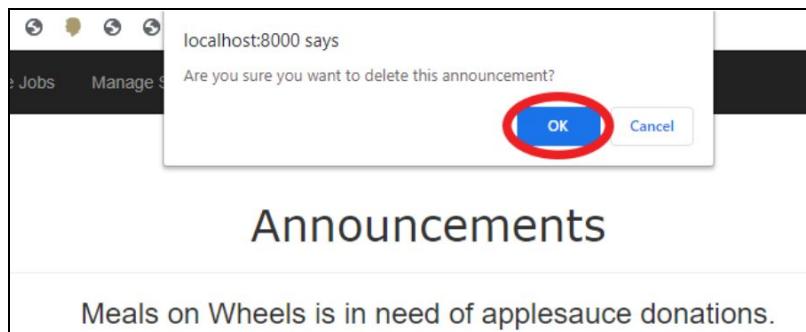
In order to delete an announcement, which removes an announcement from the announcements list, a staff user must click the blue “Delete” button underneath the announcement that is to be deleted.

The screenshot shows a web application interface for managing announcements. At the top, there is a navigation bar with links: Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and a 'Create an Announcement' button. Below the navigation bar, the title 'Announcements' is displayed. Three announcements are listed:

- Meals on Wheels is in need of applesauce donations. (Posted April 11, 2010) [Delete](#) (circled in red)
- Volunteers: Please do not eat the food you should be delivering. (Posted April 11, 2010) [Delete](#) (circled in red)
- This is an example announcement. (Posted April 12, 2010) [Delete](#) (circled in red)

At the bottom of the page, there is a link labeled 'Substitution Requests'.

After clicking “Delete” for the announcement to be deleted, a confirmation prompt will appear to ensure that the staff user intentionally meant to delete the announcement. In order to complete the deletion, the staff user must click the blue “OK” button.



## Manage Jobs

The “Manage Jobs” page contains links to every job’s edit-page (general and specific day for routes). It also allows users to view who is working on a particular day (like the [Job Overview Report](#)), quickly open substitution requests for Open Jobs, quickly fill open substitution requests, and email volunteers (by job, job type, or day).

### *View Jobs*

Click on “Manage Jobs” in the navigation bar to view this page.



The page will automatically open to the current date or the next available weekday (if the current day is Saturday or Sunday). Users may view jobs for another day using the datepicker located just below the page's title.

Various email buttons are located on the page; users may choose to email all volunteers for the day being viewed, email volunteers by job (button will not be visible if the volunteer doesn't have an email address in the database), or email volunteers by job type (see [Emailing Volunteers](#) for more information).

If a job has an open substitution request for a particular day, this information will be red. Users can click on the red text to edit that substitution request.

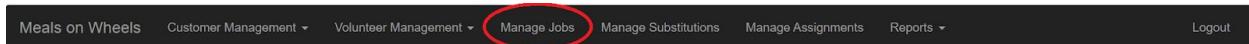
If a job is assigned to Open Job for a certain day, but no substitution request has been made, users may click on the Open Job text to quickly create a substitution request for such job.

A screenshot of the 'Manage Jobs' page. At the top, there are four buttons: 'Generate Routes', 'Generate Labels', 'Generate Pet Labels', and 'Create New Job'. Below that is the section title 'Manage Jobs' and the date 'Monday, April 13, 2020'. A datepicker shows '04/13/2020' with a 'Go' button. There is also a checkbox for 'Email all of this Day's Volunteers'. The main content area is titled 'Route' and lists four routes. Each route has a checkbox for 'Email this Day's Volunteer(s): Route'. The columns are 'Job', 'Volunteer(s)', and 'Options'. Route 1: 'Route 1' with a 'View this Day' button. Route 2: 'Route 2' with a 'View this Day' button. Route 3: 'Route 3' with a 'View this Day' button, followed by 'Open Substitution Request' in red text. Route 4: 'Route 4' with a 'View this Day' button, followed by 'OPEN JOB' in blue text. A small note at the bottom right says '\*\* denotes volunteering via substitution'.

### Create a Job

The following steps explain how to create a route, packer, or shuttle job.

1. Navigate to the “Manage Jobs” page by clicking on its link in the navigation bar



2. Click on “Create New Job” in the top right corner of this page

## Section 2: Staff

The screenshot shows a top navigation bar with links: Meals on Wheels, Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and Logout. Below this is a secondary navigation bar with buttons for Generate Routes, Generate Labels, Generate Pet Labels, and Create New Job. The 'Create New Job' button is circled in red. The main content area displays the title 'Manage Jobs' and the date 'Monday, April 13, 2020'.

- Fill out the form as desired. If you are creating a route, more boxes will appear once the job type is selected. Note: No two jobs may have the same name or route number. The route number field will be populated with the next available route number.

The screenshot shows the 'Create Job' form. It includes fields for Name (with placeholder 'Name\*'), Number of volunteers required (with value '1'), Job type (set to 'Route'), Number (with value '34'), and Description (a large text area). At the bottom is a 'Create' button.

*(Creating a Route)*

The screenshot shows the 'Create Job' form with the 'Name' field containing 'packer' and the 'Job type' field set to 'Packer'. The other fields and layout are identical to the previous screenshot.

*(Creating a Packer/Shuttle)*

- Click "Create" to create the job

## Edit/Delete a Job

The following steps explain how to edit and delete jobs. Users may also view all assignments for a particular job on the edit page and are given options to email assigned volunteers, email future substitutes, or email both (see [Emailing Volunteers](#) for more information).

1. Navigate to the “Manage Jobs” page by clicking on its link in the navigation bar



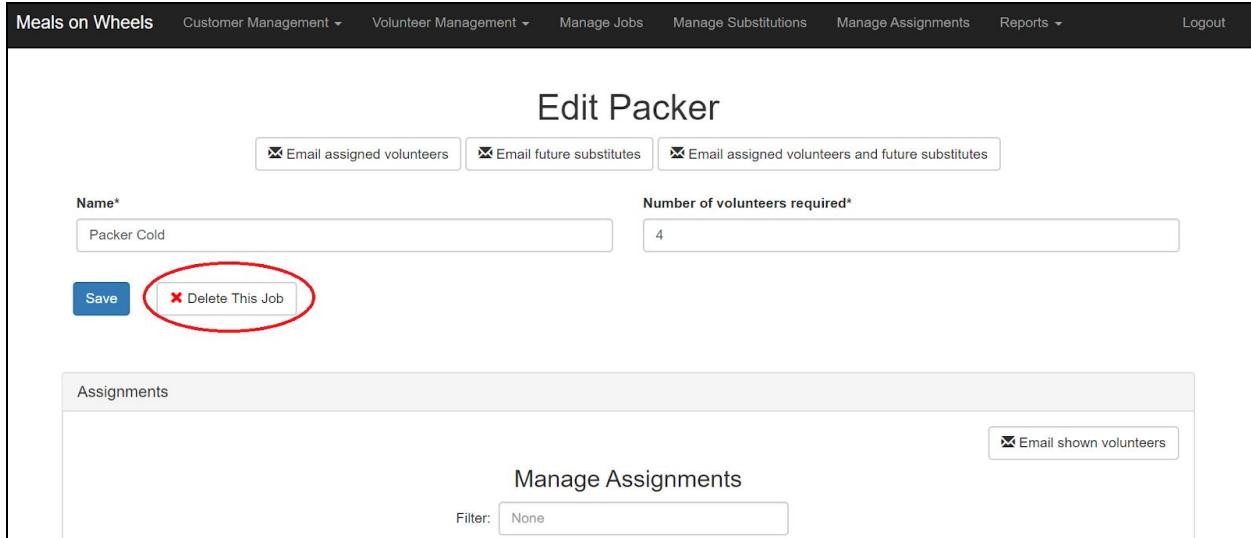
2. Click on the name of the job to be edited/deleted.

Manage Jobs		
Monday, April 13, 2020		
Date:	04/13/2020	<input type="button" value="Go"/>
<input checked="" type="checkbox"/> Email all of this Day's Volunteers		
<b>Route</b> <input checked="" type="checkbox"/> Email this Day's Volunteer(s): Route		
** denotes volunteering via substitution		
Job	Volunteer(s)	Options
Route 1 <a href="#">View this Day</a>	Volunteer 393	<input checked="" type="checkbox"/> Email Volunteer(s)
Route 2 <a href="#">View this Day</a>	No Recurring Assignment	
Route 3 <a href="#">View this Day</a>	<a href="#">Open Substitution Request</a> ↗	
Route 4 <a href="#">View this Day</a>	OPEN JOB ↗	

Packer		
<input checked="" type="checkbox"/> Email this Day's Volunteer(s): Packer		
** denotes volunteering via substitution		
Job	Volunteer(s)	Options
Packer Cold <a href="#">View this Day</a>	Volunteer 517, Volunteer 381	<input checked="" type="checkbox"/> Email Volunteer(s)
Packer Hot	Volunteer 84, Volunteer 286, Volunteer 201	<input checked="" type="checkbox"/> Email Volunteer(s)

3. If editing, skip this step. If deleting, this is the last step. Click the delete button to delete the job. This button is located at the top of the page for packers and shuttles and at the bottom for routes.

*Note: Deleting a job will delete associated assignments and substitutions. If the job is a route, all customers that were on the route will be removed in the process of deletion.*



**Edit Packer**

Email assigned volunteers    Email future substitutes    Email assigned volunteers and future substitutes

Name*	Number of volunteers required*
Packer Cold	4

**Save**   **Delete This Job** (circled in red)

**Assignments**

**Manage Assignments**

Email shown volunteers

Filter: None

(Delete Packer/Shuttle)



**Route Details**

Name*	Num vols required*
Route 33	1

Number\*

33

Description

**Save**   **Delete This Route** (circled in red)

(Delete Route)

4. Fill out the form as desired.

*Note: For packers and shuttles, this form is located at the top of the page. For routes, this form is located in a panel at the bottom of the page*

## Section 2: Staff

The screenshot shows the 'Edit Packer' page. At the top, there is a navigation bar with links: Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and Logout. Below the navigation bar, the title 'Edit Packer' is centered. There are three checkboxes at the top: 'Email assigned volunteers', 'Email future substitutes', and 'Email assigned volunteers and future substitutes'. Below these are two input fields: 'Name\*' containing 'Packer Cold' and 'Number of volunteers required\*' containing '4'. Underneath these fields are two buttons: 'Save' and 'Delete This Job'. A large section titled 'Assignments' follows, containing a sub-section titled 'Manage Assignments' with a 'Filter' dropdown set to 'None'. A checkbox labeled 'Email shown volunteers' is located in the top right corner of this section.

*(Packer/Shuttle)*

The screenshot shows the 'Edit Route' page. At the top, there is a section titled 'Route Details'. It contains three input fields: 'Name\*' with 'Route 33', 'Num vols required\*' with '1', and 'Number\*' with '33'. Below these is a 'Description' field, which is currently empty. At the bottom of the 'Route Details' section are two buttons: 'Save' and 'Delete This Route'. The entire 'Edit Route' page is enclosed in a large rectangular frame.

*(Edit Route)*

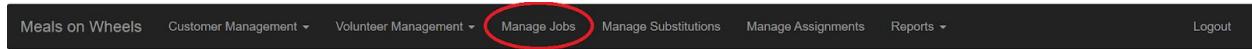
5. Click "Save" to submit changes.

# Routes

## *View General Route (No Specific Day)*

Viewing the general route allows staff to see all of the customers on a route, regardless of what day of the week it currently is. This is useful to change the delivery order, email volunteers on the route, and add new customers to routes. All routes start at Meals on Wheels at 704 Rose Hill Drive and end at the address of the last customer.

To view a general route, navigate to the manage jobs page.



Click on the route desired highlighted in blue.

Job	Volunteer(s)	Options
Earlysville <a href="#">View This Day</a>	Ben Ben	<input type="checkbox"/> Email Volunteer(s)
Scottsville <a href="#">View This Day</a>	No Assignment	
Walmart <a href="#">View This Day</a>	No Assignment	
Timbuktu <a href="#">View This Day</a>	Michael Scott	<input type="checkbox"/> Email Volunteer(s)
Cool. <a href="#">View This Day</a>	No Assignment	

## *Editing Routes (Route Details and Customers on Routes)*

For editing route details (name, number, description, ...) see [Edit/Delete a Job](#).

To add a customer on a route, click on the dropdown and search for the desired customer. Click “Add Customer” to add them to the route.

*Note: If a selected customer is already on another route, the user will be given the option of adding them to this route (and removing them from the previous one) or editing their original route.*

## Section 2: Staff

**Edit Route 2**

No one is assigned

Select a Customer to Add\*

John Smith Add Customer

Assignments

Manage Assignments

Email shown volunteers

To change the order of customers on a route, click the arrow buttons (see below) to move them up and down the list.

**Edit Route 2**

Order	Customer	Address	Change Order	Remove
1	John Smith	Elliewood Ave, Charlottesville, VA 22903, USA	<span>^</span> <span>▼</span>	<span>X</span>
2	Jane Doe	Charlottesville, VA, USA	<span>^</span> <span>▼</span>	<span>X</span>

Select a Customer to Add\*

Customers on this route are omitted from choices.

Add Customer

1 ft. About 1 min  
1. Head 1 ft

B 704 Rose Hill Dr, Charlottesville, VA 22903, USA

1 ft. About 1 min  
1. Head 1 ft

127.0.0.1:8000/routes/move-customer/2/1/up/

To remove a customer from a route, click the “X” button in their row of the table.

## Section 2: Staff

The screenshot shows the 'Edit Route 2' interface. On the left, a table lists two customers: 'John Smith' at 'Elliewood Ave, Charlottesville, VA 22903, USA' and 'Jane Doe' at 'Charlottesville, VA, USA'. The 'Remove' button next to Jane Doe is circled in red. Below the table is a dropdown menu 'Select a Customer to Add\*' and a 'Add Customer' button. To the right is a map showing the route path with a red dot at the end. At the bottom, there are two sections labeled A and B, each with a location pin, address ('704 Rose Hill Dr, Charlottesville, VA 22903, USA'), distance ('1 ft. About 1 min'), and heading ('1. Head 1 ft'). The URL '127.0.0.1:8000/routes/move-customer/2/1/up/' is visible at the bottom.

### *View Route on Specific Day*

As staff, routes are accessed from the Manage Jobs page, through the View this Day button.

The screenshot shows the 'Manage Jobs' page for Monday, April 13, 2020. It includes buttons for 'Generate Routes', 'Generate Labels', 'Generate Pet Labels', and 'Create New Job'. A checkbox 'Email all of this Day's Volunteers' is present. The main area is titled 'Route' and contains a table with two rows. The first row for 'Route 1' has a 'View this Day' button circled in red. The second row for 'Route 2' also has a 'View this Day' button. A note '\*\* denotes volunteering via substitution' is shown to the right. The URL '127.0.0.1:8000/jobs/manage/' is visible at the bottom.

Or from the generic view route page, with the View Specific Day selector.

The screenshot shows the 'Edit Route 2' interface. At the top, there's a navigation bar with links like 'Meals on Wheels', 'Customer Management', 'Volunteer Management', 'Manage Jobs', 'Manage Substitutions', 'Manage Assignments', 'Reports', and 'Logout'. Below the navigation is a search bar labeled 'View Specific Day:' with the date '04/12/2020' and a 'Go' button, which is circled in red. The main area is titled 'Edit Route 2' and contains three checkboxes for 'Email assigned volunteers', 'Email future substitutes', and 'Email assigned volunteers and future substitutes'. Below these are two rows of route details:

Order	Customer	Address	Change Order	Remove
1	John Smith	Elliewood Ave, Charlottesville, VA 22903, USA		
2	Jane Doe	Charlottesville, VA, USA		

To the right of the route table is a map showing a single location marked with a red pin. There are tabs for 'Map' and 'Satellite'.

The route shows the map as well as the directions and who is on the route.

## Manage Volunteers

### *View Volunteers*

To view all volunteers, the user should select “Manage Volunteers” from the “Volunteer Management” dropdown in the navigation bar. A table of all volunteers will load, including names, phone numbers, and email addresses. To view more details about a specific volunteer, the user should click on his/her name. Here the user will see the above information plus username, staff-status, organization, address, home, cell, and work phone numbers, birthday, join date, notes, and his/her current recurring assignments.

The screenshot shows the 'Volunteer Management' page. The navigation bar includes 'Meals on Wheels', 'Customer Management', 'Volunteer Management' (which is currently selected and has a dropdown menu), 'Manage Jobs', 'Manage Substitutions', 'Manage Assignments', 'Reports', and 'Logout'. The 'Volunteer Management' dropdown menu is open, showing options: 'Manage Volunteers' (which is circled in red), 'Add a New Volunteer', and 'Export Volunteers'. Below the dropdown is a section titled 'Announcements' containing a message about apple sauce donations. Further down is a message for volunteers about not eating food they are delivering. The page also features a 'Substitution Requests' section for Monday, April 13, stating there are no open requests.

## Section 2: Staff

Manage Volunteers			
Volunteer ↑	Cell	Email	Delete
admin user		iamadmin@admin.admin.com	<input type="button" value="Delete"/>
Ben Ben	123-321-878	ben@ben.com	<input type="button" value="Delete"/>
Demo Vol 1	999.999.9999	email@gmail.com	<input type="button" value="Delete"/>
George Jones	222-333-4568	george@tonight.com	<input type="button" value="Delete"/>

### Edit Volunteer

First name: Ben      Last name: Ben

Username\*: benben      Email address: ben@ben.com

Organization: Ben's Org      Address\*: 107 Piedmont Ave S, Charlottesville, VA 22903, USA

Home phone:      Cell phone: 123-321-878      Work phone:

Birth date: 09/01/2019      Join date\*: 04/11/2020

Notes:

### Edit a Volunteer

Editing any volunteer information is done by simply altering any fields while viewing a specific volunteer and clicking “Save.”

## Section 2: Staff

The screenshot shows a staff profile edit form. At the top, there are fields for 'Username\*' (benben) and 'Email address' (ben@ben.com). A checkbox for 'Staff status' is checked, with a note explaining it designates whether the user can log into the admin site. Below these are fields for 'Organization' (Ben's Org) and 'Address\*' (107 Piedmont Ave S, Charlottesville, VA 22903, USA). There are also fields for 'Home phone', 'Cell phone' (123-321-878), and 'Work phone'. Under 'Birth date' (09/01/2019) and 'Join date\*' (04/11/2020), there is a 'Notes' section containing 'Some New Notes!' which is circled in red. At the bottom left is a 'Save' button, also circled in red. Below the form is a 'Manage Assignments' section.

### Delete a Volunteer

To delete a volunteer, the user can find him/her in the table of all volunteers [here](#). Click the “Delete” button on that row.

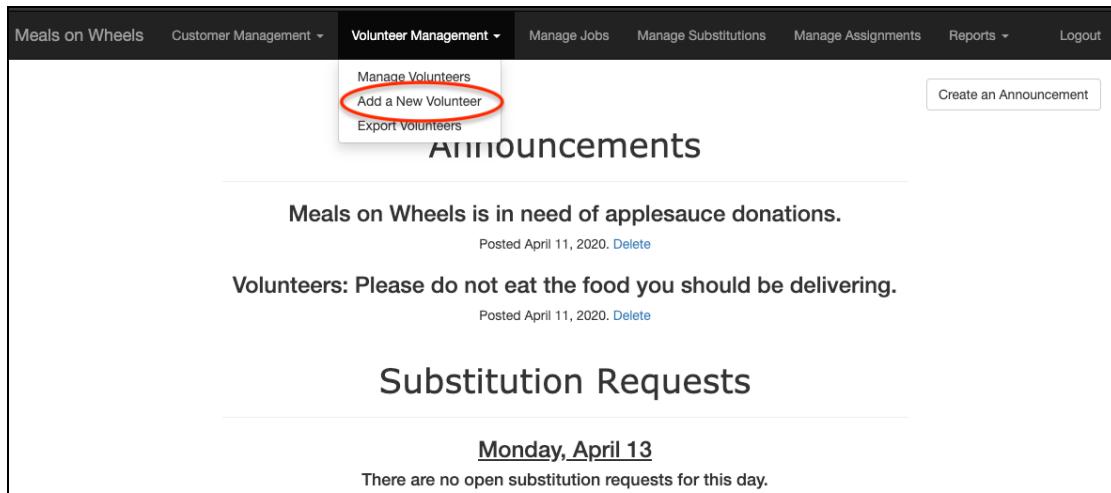
The screenshot shows a list of volunteers with columns for 'Volunteer' (with a sort arrow), 'Cell', 'Email', and 'Delete'. A modal dialog box titled 'localhost:8000 says' asks if the user is sure they want to delete the volunteer, noting that assignments and substitutions will be set to Open Job. The 'OK' button in the dialog is circled in red. On the main table, the 'Delete' button for the volunteer 'Ben Ben' is also circled in red.

Volunteer ↑	Cell	Email	Delete
admin user		iamadmin@admin.admin.com	<input type="button" value="✖ Delete"/>
Ben Ben	123-321-878	ben@ben.com	<input type="button" value="✖ Delete"/>
Demo Vol 1	999-999-9999	email@gmail.com	<input type="button" value="✖ Delete"/>
George Jones	222-333-4568	george@tonight.com	<input type="button" value="✖ Delete"/>

## Create a Volunteer

To create a new volunteer, the user should select “Add a New Volunteer” from the “Volunteer Management” dropdown in the navbar. The user can fill out the form and click “Sign Up.”

*Note: this will send an email to the new volunteer prompting them to create a password.*



Meals on Wheels Customer Management ▾ **Volunteer Management** ▾ Manage Jobs Manage Substitutions Manage Assignments Reports ▾ Logout

Manage Volunteers  
**Add a New Volunteer**  
Export volunteers

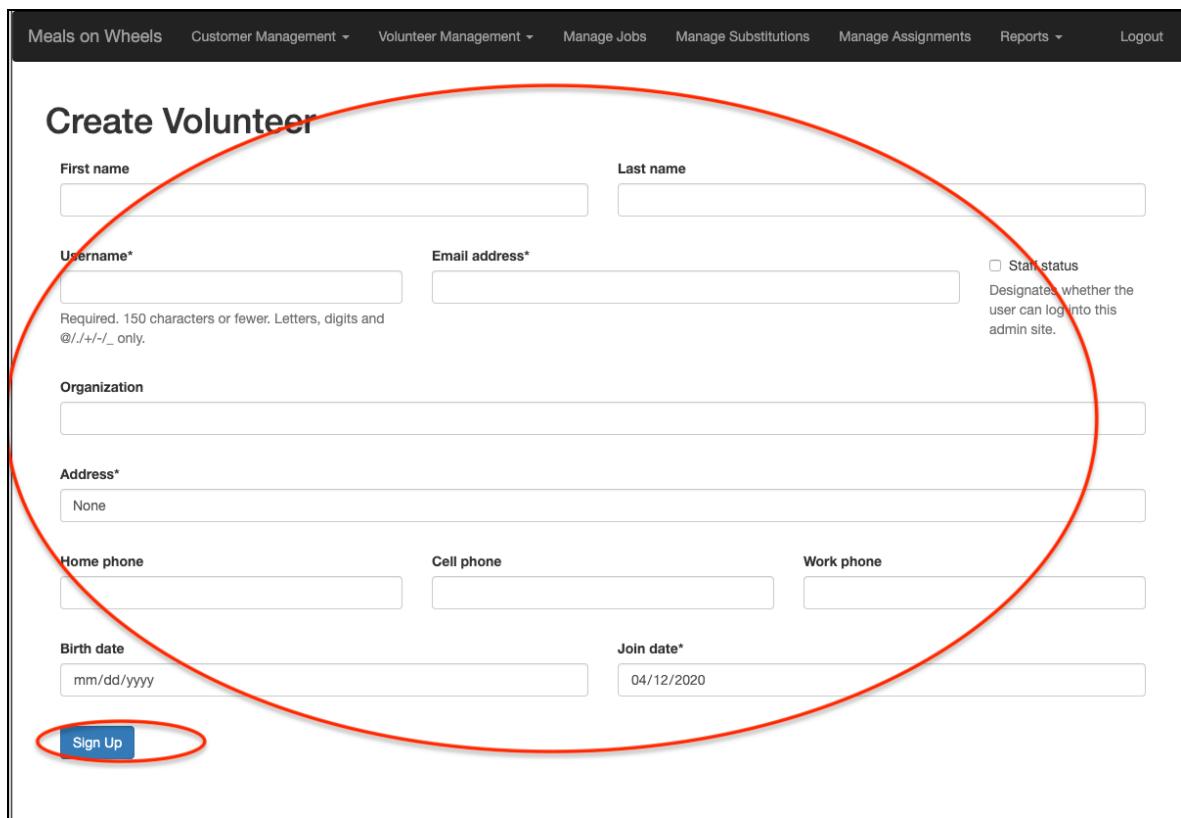
**ANNOUNCEMENTS**

Meals on Wheels is in need of applesauce donations.  
Posted April 11, 2020. [Delete](#)

Volunteers: Please do not eat the food you should be delivering.  
Posted April 11, 2020. [Delete](#)

**Substitution Requests**

**Monday, April 13**  
There are no open substitution requests for this day.



Meals on Wheels Customer Management ▾ **Volunteer Management** ▾ Manage Jobs Manage Substitutions Manage Assignments Reports ▾ Logout

### Create Volunteer

First name  Last name

Username\*  Email address\*

Required. 150 characters or fewer. Letters, digits and @/./+/-/\_ only.

Staff status  
Designates whether the user can log into this admin site.

Organization

Address\*   
None

Home phone  Cell phone  Work phone

Birth date  mm/dd/yyyy Join date\*  04/12/2020

**Sign Up**

### *Export Volunteers*

To export volunteers to a format that can be opened in Microsoft Excel, a user must first click on the “Volunteer Management” button in the navigation bar.



Next, the user must click on the “Export Volunteers” dropdown item.

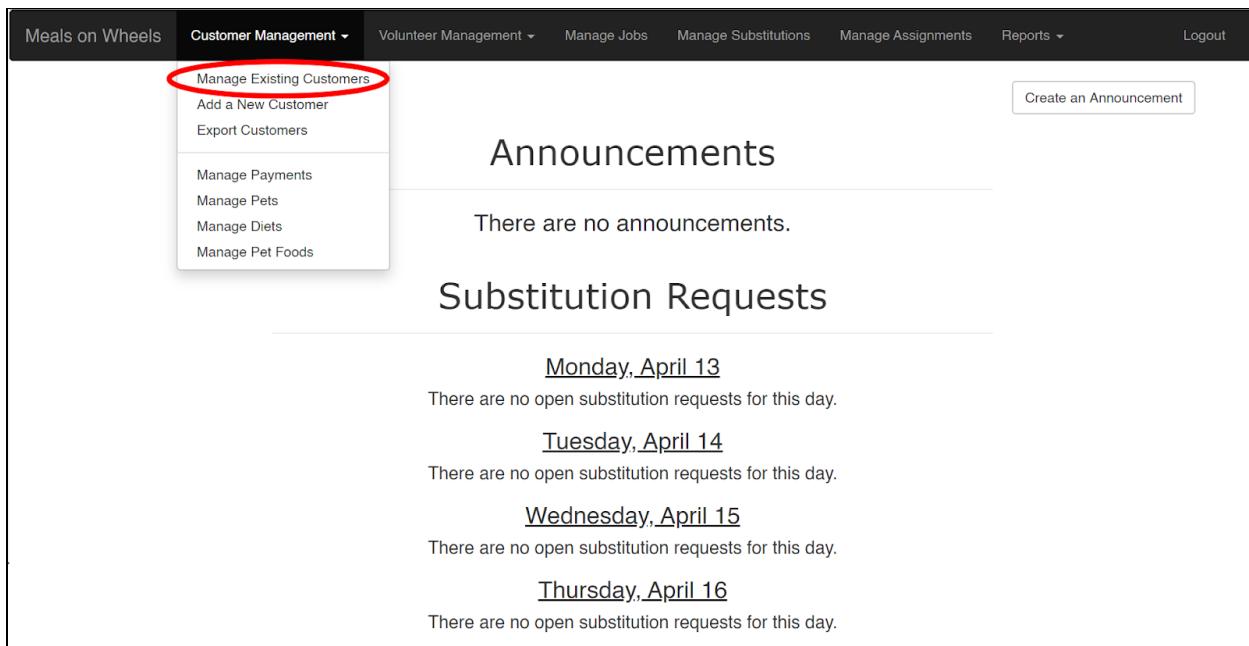


The user will then be prompted to save the file containing the exported volunteers. The user should select the destination where they would like the file to be saved and click “Save.” This will download a “.csv” file, which is openable using Microsoft Excel. All volunteers in the database will be exported, and all fields associated with any given volunteer are included.

# Manage Customers

## *View Customers*

To view all customers, the user should select “Manage Existing Customers” from the “Customer Management” dropdown in the navigation bar. A table of all customers will load, including their names, phone numbers, and the route volunteers will deliver to. To view more details about a specific customer, the user should click on his/her name. Here the user will see the above information plus their address, birthday, contact/payment information, meal recurrence, and more.



The screenshot shows the software's main navigation bar at the top with various links like "Meals on Wheels", "Customer Management", "Volunteer Management", etc. A dropdown menu for "Customer Management" is open, with "Manage Existing Customers" highlighted and circled in red. Below the navigation is a section titled "Announcements" which displays the message: "There are no announcements." There is also a "Create an Announcement" button.

**Announcements**

There are no announcements.

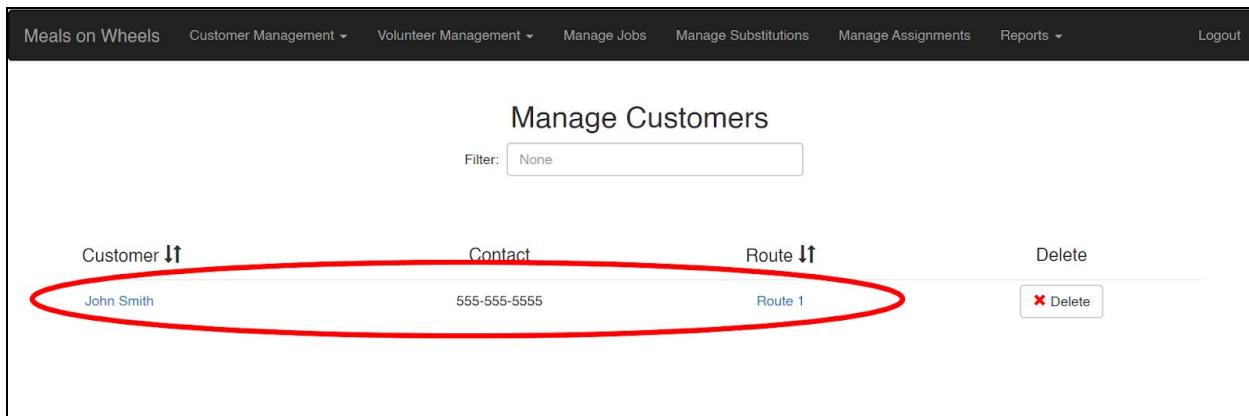
**Substitution Requests**

Monday, April 13  
There are no open substitution requests for this day.

Tuesday, April 14  
There are no open substitution requests for this day.

Wednesday, April 15  
There are no open substitution requests for this day.

Thursday, April 16  
There are no open substitution requests for this day.



The screenshot shows the "Manage Customers" page. At the top, there is a search bar labeled "Filter:" with "None" selected. The main area contains a table with columns: "Customer" (with a red double-headed arrow icon), "Contact" (with a red double-headed arrow icon), "Route" (with a red double-headed arrow icon), and "Delete". A single row is visible in the table, showing "John Smith" in the Customer column, "555-555-5555" in the Contact column, and "Route 1" in the Route column. A "Delete" button with a red "X" icon is located in the Delete column.

Customer ↑↑	Contact ↑↑	Route ↑↑	Delete
John Smith	555-555-5555	Route 1	

Meals on Wheels    Customer Management ▾    Volunteer Management ▾    Manage Jobs    Manage Substitutions    Manage Assignments    Reports ▾    Logout

## Edit Customer

First name\*    Last name\*    Birth date\*    Sex

John    Smith    04/05/1980

Phone    Address\*    Active    Historical route    Route Assigned

555-555-5555    Enter a location     Active     Historical route    Route 1

Meal Recurrence\*

Weekly, each Monday, Tuesday, Friday

+ Add rule | + Add date

Num weekend meals\*    Join date\*    Pays    Bill to

0    04/12/2020       

Printed notes    Notes

### Edit a Customer

Editing any customer information is done by simply altering any fields while viewing a specific customer and clicking “Save.”

**Historical Route:** When a customer is removed from a route, that route number will be automatically populated in the “Historical route” field. When they are added back to any route, this field will be reset.

**Active:** An inactive customer will not show up in reports or routes.

The screenshot shows a form for editing a customer. At the top left is a 'Contact' field containing 'Jill Smith', which is circled in red. To its right is a 'Contact phone' field containing '777-777-7777'. Below these are 'Referred' and 'Ref phone' fields, both empty. Underneath is a 'Diet' section with dropdown menus for 'Cold diet restrictions' (set to 'N/A') and 'Hot diet restrictions'. Further down are 'Pet' and 'Petfood' dropdowns, both set to '----'. At the bottom left is a 'Save' button, which is also circled in red.

### Delete a Customer

To delete a customer, find him/her on the table of all volunteers [here](#). Click the “Delete” button on that row.

The screenshot shows a table of customers. At the top, a modal dialog box is displayed with the message '127.0.0.1:8000 says Are you sure you want to delete this customer? This action cannot be undone.' Two buttons, 'OK' and 'Cancel', are visible, with 'OK' being circled in red. Below the table, the first customer listed is 'John Smith' with contact number '555-555-5555'. To the right of his name is a 'Route' column showing 'Route 1' and a 'Delete' button, which is also circled in red.

### Create a Customer

To create a new volunteer, a staff user should select “Add a New Customer” from the “Customer Management” dropdown in the navbar, fill out the form, and click “Create.”

The screenshot shows a web-based application for managing meals on wheels. At the top, there's a navigation bar with links for 'Meals on Wheels', 'Customer Management', 'Volunteer Management', 'Manage Jobs', 'Manage Substitutions', 'Manage Assignments', 'Reports', and 'Logout'. A dropdown menu under 'Customer Management' is open, showing options like 'Manage Existing Customers', 'Add a New Customer' (which is circled in red), and 'Export Customers'. To the right of the menu, there's a button labeled 'Create an Announcement'. Below the navigation, there's a section titled 'Announcements' with a message stating 'There are no announcements.' Further down, there's a section titled 'Substitution Requests' with a heading for each day of the week, followed by a message indicating 'There are no open substitution requests for this day.' for each.

Meals on Wheels

Customer Management ▾

Volunteer Management ▾

Manage Jobs

Manage Substitutions

Manage Assignments

Reports ▾

Logout

Manage Existing Customers

Add a New Customer

Export Customers

Create an Announcement

## Announcements

There are no announcements.

## Substitution Requests

Monday, April 13  
There are no open substitution requests for this day.

Tuesday, April 14  
There are no open substitution requests for this day.

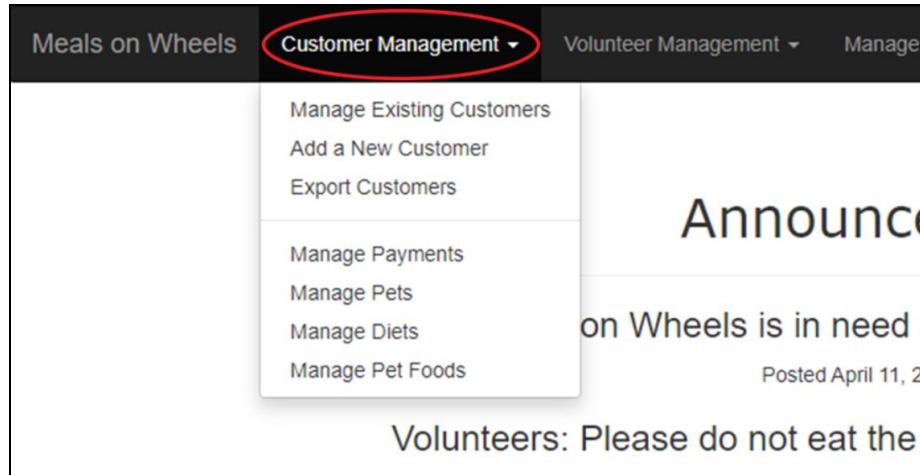
Wednesday, April 15  
There are no open substitution requests for this day.

Thursday, April 16  
There are no open substitution requests for this day.

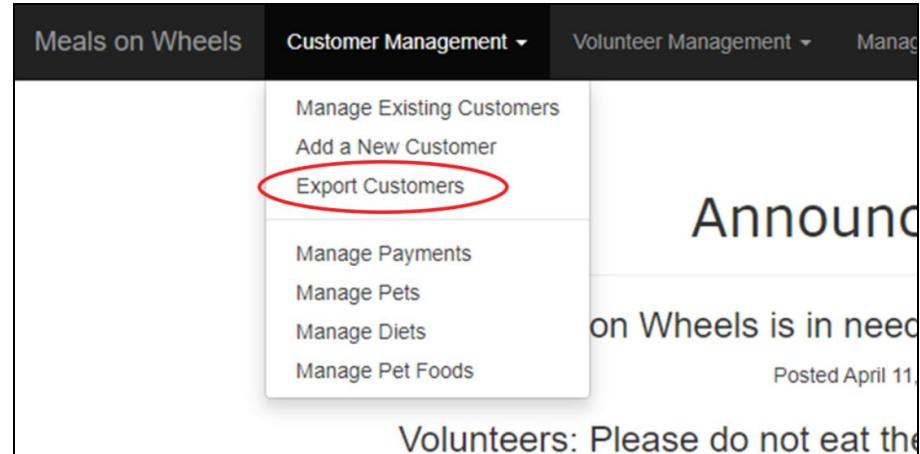
The screenshot shows the 'Create Customer' form in the Meals on Wheels software. The form includes fields for First name\*, Last name\*, Birth date\*, Sex, Phone, Address\*, Meal Recurrence\*, Num weekend meals\*, Join date\*, Pays, Bill to, Printed notes, Notes, Contact, Contact phone, Referred, Ref phone, Diet, Cold diet restrictions, Hot diet restrictions, Pet, Petfood, End date, and End reason. A 'Create' button is located at the bottom left, which is highlighted with a red oval.

### Export Customers

To export customers to a format that can be opened in Microsoft Excel, a staff user must first click on the “Customer Management” button in the navigation bar.



Next, the staff user must click on the “Export Customers” dropdown item.



The user will then be prompted to save the file containing the exported customers. The user should select the destination where they would like the file to be saved and click “Save.” This will download a “.csv” file, which is openable using Microsoft Excel. Only active customers will be exported, and all fields associated with any given customer are included.

## Manage Assignments

Assignments are always displayed in a table titled “Manage Assignments”.

### *View Assignments*

- To view all assignments on one page, a user should click on the “Manage Assignments” tab in the navigation bar.



- To view only assignments for a particular job, a user should click on a link to that job's edit page (See [Edit/Delete a Job](#)).
- To view only assignments filled by a particular volunteer, a user should click on a link to that particular volunteer's edit page (See [Edit a Volunteer](#)).

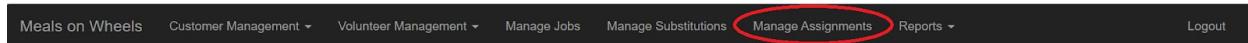
An assignment is a grouping of a day of month, volunteer, and a job. Each row in the manage assignments table may represent one or multiple assignments. The rows are groupings of assignments by volunteer and by job. Each row in the table contains a link to its associated volunteer's edit page (click on the volunteer's name), associated job's edit page (click on the job's name), and a link to edit/delete assignments it represents (click on the text in the third column).

All assignments tables can be searched and sorted as explained in [Filtering and Sorting Tables](#).

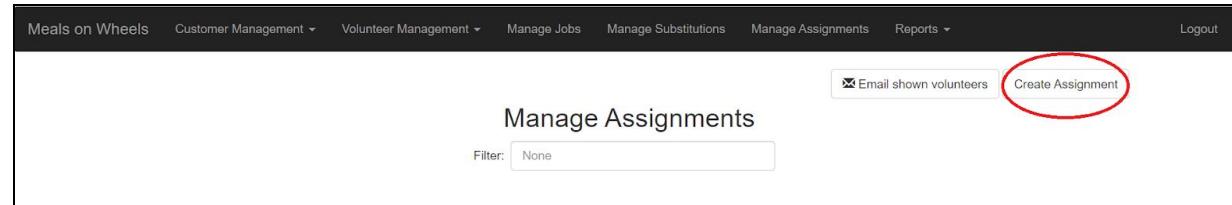
### *Create Assignments*

The following steps explain how to create an assignment.

1. Click on the “Manage Assignments” tab in the navigation bar.



2. Click on the “Create Assignment” button in the top right corner of the body of the page.



3. Enter data into the form. Use the “Job” dropdown to select a job. Check the boxes for the days this assignment should be created. Use the searchable dropdown to select a volunteer or leave it blank to make the volunteer “Open Job” (directions for using this dropdown are explained in [Using Searchable Dropdowns](#)).

Job\*

Please select a job.

Select day(s)

<input type="checkbox"/> First Monday	<input type="checkbox"/> Second Monday	<input type="checkbox"/> Third Monday	<input type="checkbox"/> Fourth Monday	<input type="checkbox"/> Fifth Monday
<input type="checkbox"/> First Tuesday	<input type="checkbox"/> Second Tuesday	<input type="checkbox"/> Third Tuesday	<input type="checkbox"/> Fourth Tuesday	<input type="checkbox"/> Fifth Tuesday
<input type="checkbox"/> First Wednesday	<input type="checkbox"/> Second Wednesday	<input type="checkbox"/> Third Wednesday	<input type="checkbox"/> Fourth Wednesday	<input type="checkbox"/> Fifth Wednesday
<input type="checkbox"/> First Thursday	<input type="checkbox"/> Second Thursday	<input type="checkbox"/> Third Thursday	<input type="checkbox"/> Fourth Thursday	<input type="checkbox"/> Fifth Thursday
<input type="checkbox"/> First Friday	<input type="checkbox"/> Second Friday	<input type="checkbox"/> Third Friday	<input type="checkbox"/> Fourth Friday	<input type="checkbox"/> Fifth Friday

Volunteer

Leave this field blank for Open Job.

Submit

- Click submit to create the assignment(s); you will be redirected to the “Manage Assignments” page.

### Edit or Delete Assignments

The following steps explain how to edit and delete assignments.

*Note: Assignments’ jobs cannot be changed. Edits to an assignment will propagate to any associated substitutions. Deleting an assignment will delete associated substitutions.*

- Navigate to a page containing a Manage Assignments Table that contains a row representing the assignment(s) to be edited/deleted
  - For help navigating to one of such pages or for an explanation of the Manage Assignments Table and its rows, go to *View Assignments*
- Click on the link in the third column of the row that represents the assignment(s) to be edited/deleted

Email shown volunteers Create Assignment

Manage Assignments

Filter: None

Volunteer ↑	Job ↑	Assignment(s)
Volunteer 166	Route 1	3rd Mon
Volunteer 422	Route 1	Wednesdays
Volunteer 246	Route 1	Fridays

- The form’s job and volunteer fields will be populated with the clicked row’s data. Click on the days of the month on which the changes are to be made. If editing, use the searchable dropdown to select a new volunteer for the assignment(s) on the days of

month selected in step 3. For setting the assignment's volunteer to Open Job, leave the dropdown blank; click on the “x” on the right side of the dropdown to clear it (see [Using Searchable Dropdowns](#) for more information.

The screenshot shows the 'Edit Assignments' page. At the top, there are navigation links: Meals on Wheels, Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports, and Logout. The main title is 'Edit Assignments'. Below it, there is a 'Job' field containing 'Route 1'. A section titled 'Select day(s) to edit' contains five checkboxes: 'First Wednesday', 'Second Wednesday', 'Third Wednesday', 'Fourth Wednesday', and 'Fifth Wednesday'. Below this is a 'Volunteer' field with 'Volunteer 422' selected, accompanied by a note: 'Leave this field blank for Open Job.' At the bottom are two buttons: a blue 'Edit Assignment(s)' button and a red-bordered 'Delete Assignment(s)' button with a red 'X' icon.

- Click on “Edit Assignment(s)” to submit changes. Click on “Delete Assignment(s)” to delete the assignments selected.

## Manage Substitutions

### *View Substitutions*

To view upcoming substitutions, click on “Manage Substitutions” in the navigation bar. A table of upcoming substitutions will load. To view substitutions from the past, see [Substitutions Report](#).

*Note: that the blue-text links link to job and volunteer details, see below on how to edit the substitutions. Also, note that unfilled substitutions are highlighted red.*

Meals on Wheels Customer Management Volunteer Management Manage Jobs **Manage Substitutions** Manage Assignments Reports Logout

Create an Announcement

## Announcements

**Meals on Wheels is in need of applesauce donations.**  
Posted April 11, 2020. [Delete](#)

**Volunteers: Please do not eat the food you should be delivering.**  
Posted April 11, 2020. [Delete](#)

## Substitution Requests

Monday, April 13  
Timbuktu needs a sub.

Tuesday, April 14  
There are no open substitution requests for this day.

Wednesday, April 15  
Packer Cold needs a sub.  
Walmart needs a sub.

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

Create Substitution Spawn Open Job Substitutions

### Manage Substitutions

Filter: None

Displaying Upcoming Substitutions, view reports for historical information

Day	Job	Original Assignment	Substitute	Options
Monday, 04/13/2020	Route 5	Volunteer 338	Volunteer 28	<a href="#">Open</a> <a href="#">Delete</a>
Tuesday, 04/14/2020	Route 30	Volunteer 492	Volunteer 579	<a href="#">Open</a> <a href="#">Delete</a>
Wednesday, 04/15/2020	Route 17	Volunteer 232	OPEN	<a href="#">Delete</a>
Thursday, 04/16/2020	Route 9	Volunteer 226	Volunteer 60	<a href="#">Open</a> <a href="#">Delete</a>
Wednesday, 04/22/2020	Route 27	Volunteer 313	OPEN	<a href="#">Delete</a>

### Create a Substitution

To create an assignment, navigate to the Manage Substitutions page and click on Create Substitution.

1. Select the job and the date. Selecting the job and date will populate the “Assigned Volunteer” dropdown selector to the volunteers who are currently working that job.
2. Select the Assigned Volunteer that wants a substitute (i.e. wishes to not work that day on that job).
3. Select the volunteer that will fill the substitution (i.e. who will work that job on that day). To leave the substitution unfilled, simply do not select a volunteer in the Substitute field.
4. Click “Submit.”

## Section 2: Staff

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

### Manage Substitutions

Filter: None

Displaying Upcoming Substitutions, view reports for historical information

Day	Job	Original Assignment	Substitute	Options
Monday, 04/13/2020	Route 5	Volunteer 338	Volunteer 28	Open  Delete
Tuesday, 04/14/2020	Route 30	Volunteer 492	Volunteer 579	Open  Delete
Wednesday, 04/15/2020	Route 17	Volunteer 232	OPEN	Delete
Thursday, 04/16/2020	Route 9	Volunteer 226	Volunteer 60	Open  Delete
Wednesday, 04/22/2020	Route 27	Volunteer 313	OPEN	Delete

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

### Create Substitution

Assigned Volunteer needs to be specified for jobs with more than one assigned volunteer on the date selected. Otherwise, it will populate itself.

Job*	Date*
Scottsville	04/15/2020
Assigned Volunteer	Vol Unteeer
Substitute	

Leave this field blank to create an open request

A substitution for this job on this date already exists.

### Edit a Substitution

There are two ways to edit a substitution:

1. To make a filled substitution unfilled, simply click the eraser button that says “Open” on the row of the substitution on the Manage Substitutions table.

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

### Manage Substitutions

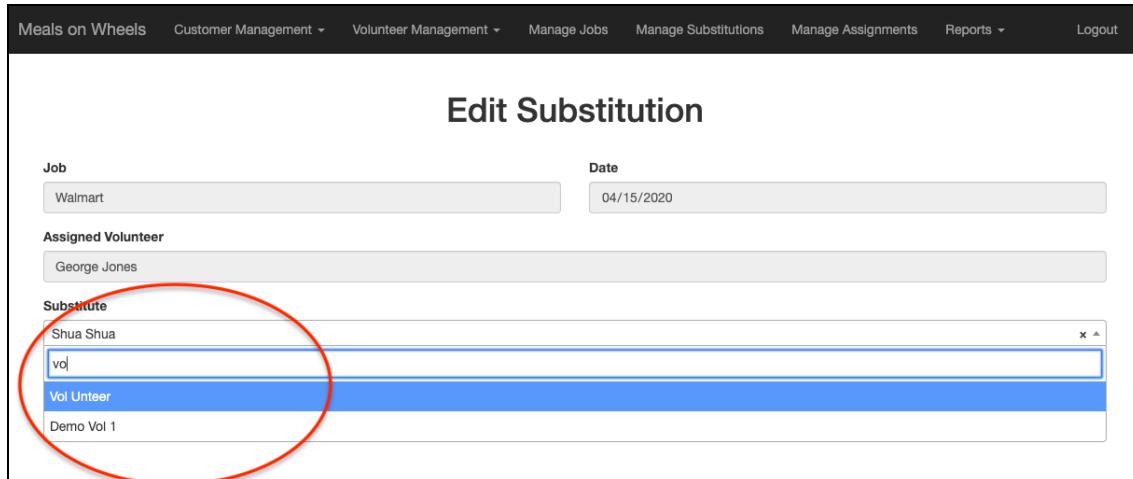
Filter: None

Displaying Upcoming Substitutions, view reports for historical information

Day	Job	Original Assignment	Substitute	Options
Monday, 04/13/2020	Route 5	Volunteer 338	Volunteer 28	Open  Delete
Tuesday, 04/14/2020	Route 30	Volunteer 492	Volunteer 579	Open  Delete
Wednesday, 04/15/2020	Route 17	Volunteer 232	OPEN	Delete
Thursday, 04/16/2020	Route 9	Volunteer 226	Volunteer 60	Open  Delete
Wednesday, 04/22/2020	Route 27	Volunteer 313	OPEN	Delete

- To change the substitute for a substitution, click on the pencil icon next to the substitute field in the row of the substitution that you wish to edit in the Manage Substitutions table. If a substitution is unfilled, this is how to fill it. Click “Submit” after changing the substitute field.

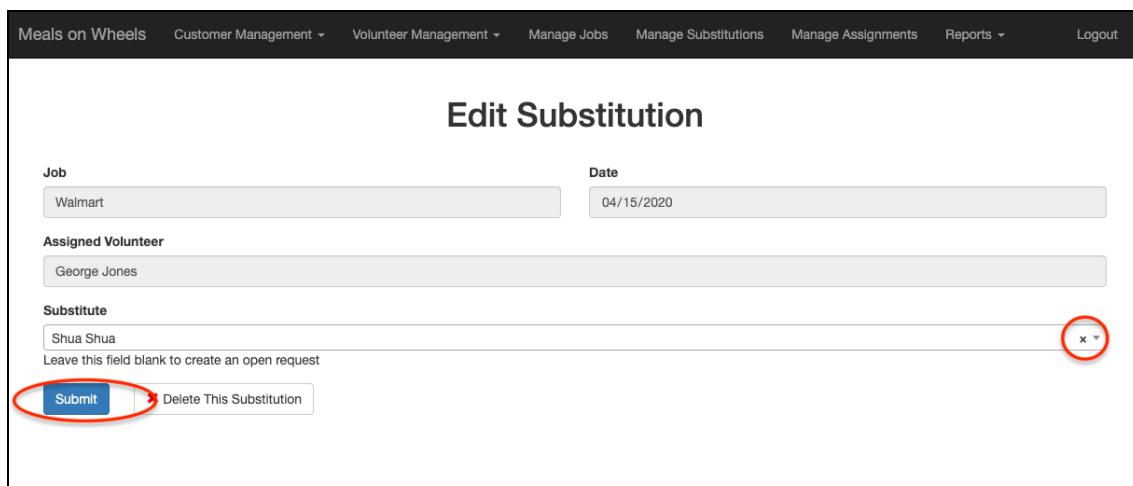
*Note: to make a substitution unfilled this way, click the small “x” next to the dropdown arrow on the substitute field. See [Searchable Dropdowns](#).*



Meals on Wheels Customer Management ▾ Volunteer Management ▾ Manage Jobs Manage Substitutions Manage Assignments Reports ▾ Logout

## Edit Substitution

Job	Date
Walmart	04/15/2020
<b>Assigned Volunteer</b>	
George Jones	
<b>Substitute</b>	
Shua Shua	
vol	
Vol Unteeer	
Demo Vol 1	



Meals on Wheels Customer Management ▾ Volunteer Management ▾ Manage Jobs Manage Substitutions Manage Assignments Reports ▾ Logout

## Edit Substitution

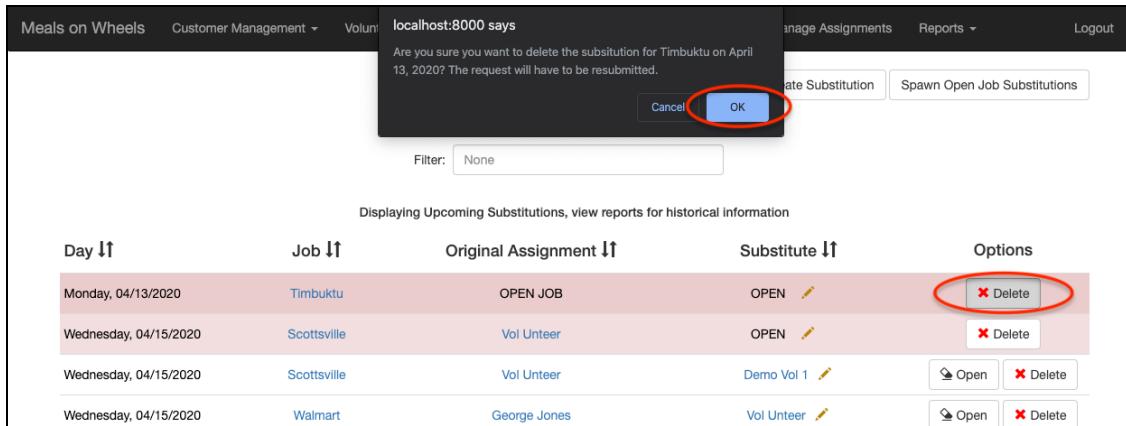
Job	Date
Walmart	04/15/2020
<b>Assigned Volunteer</b>	
George Jones	
<b>Substitute</b>	
Shua Shua	
Leave this field blank to create an open request	
<input type="button" value="Submit"/> <input type="button" value="Delete This Substitution"/>	

*Note: there is no way to edit the job, originally assigned volunteer, and date of a substitution once it is created. To do this, delete the substitution and make a new one.*

### Delete a Substitution

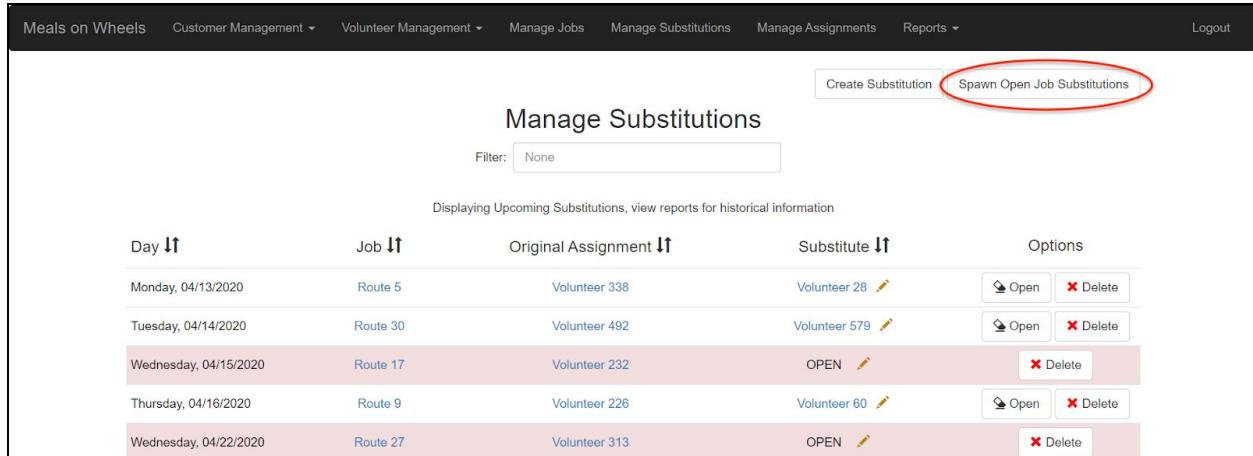
To delete a substitution, navigate to the Manage Substitution table and click the “delete” button on the row of the substitution you wish to delete. You can also click “Delete” when editing the substitution.

*Note: Deleting a substitution is not the same as removing its volunteer. Deleting a substitution will make the originally assigned volunteer work this job again. If that volunteer is expecting a substitute, you should notify them that their substitution has been revoked.*



### *Spawn Open Route Substitutions*

To create substitutions for upcoming jobs with Open Route assigned, navigate to the Manage Substitutions Page and click the “Spawn Open Job Substitutions” button in the top right of the page. Select the start and end dates of the time period for which you would like to create substitutions, and click “Create Requests.”



Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

## Create Substitution Requests For Open Jobs

Begin Date:  
04/12/2020

End Date:  
04/18/2020

**Create Requests**

Note: Dates are inclusive, and requests won't be duplicated

## Manage Payments, Pets, Diets, Pet Foods

Since Payments, Pets, Diets, and Pet Foods all relate to Customers, managing them can be done by selecting the associated selection from the “Customer Management” dropdown in the navigation bar. After selecting the appropriate management selection, a table will load with all of the selected entities. To view the entity, click on its name on the left of the table. You can edit the entity you are viewing by changing a field and pressing “Save.” To create a new entity, press the “Create \_\_\_\_\_” button in the top right of the management window; fill out the form; and press “Save.” Finally, to delete an entity, press the “Delete” button on the row of the entity that you would like to delete in the table.

Below are screenshots of the view, edit, create, delete functionality for diets. The process is identical for payments, pets, and pet foods.

1. Go to the Manage Diets page

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

Manage Existing Customers  
Add a New Customer  
Export Customers

Manage Payments  
Manage Pets  
**Manage Diets**  
Manage Pet Foods

**Announcements**

Meals on Wheels is in need of applesauce donations.  
Posted April 11, 2020. [Delete](#)

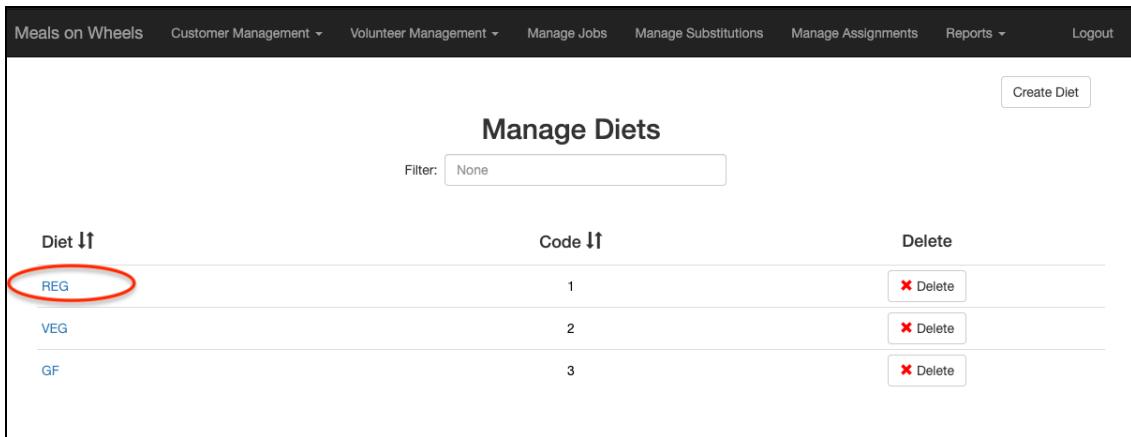
**Substitution Requests**

Monday, April 13  
There are no open substitution requests for this day.

Tuesday, April 14  
There are no open substitution requests for this day.

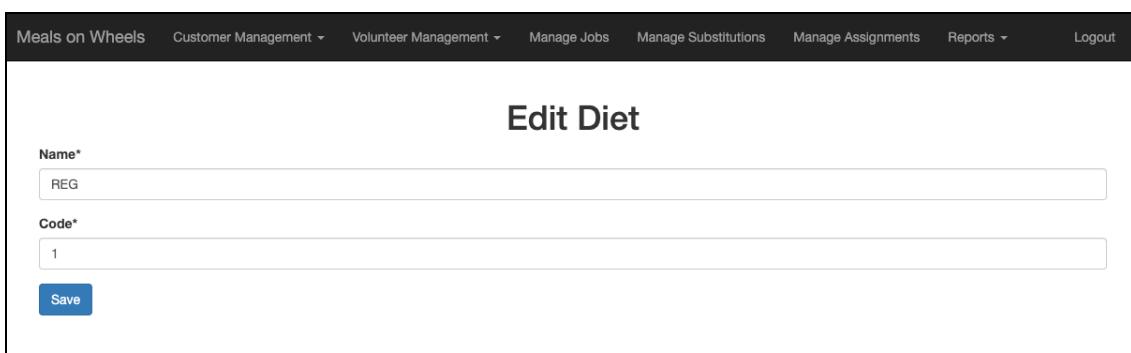
Wednesday, April 15

## 2. View a diet



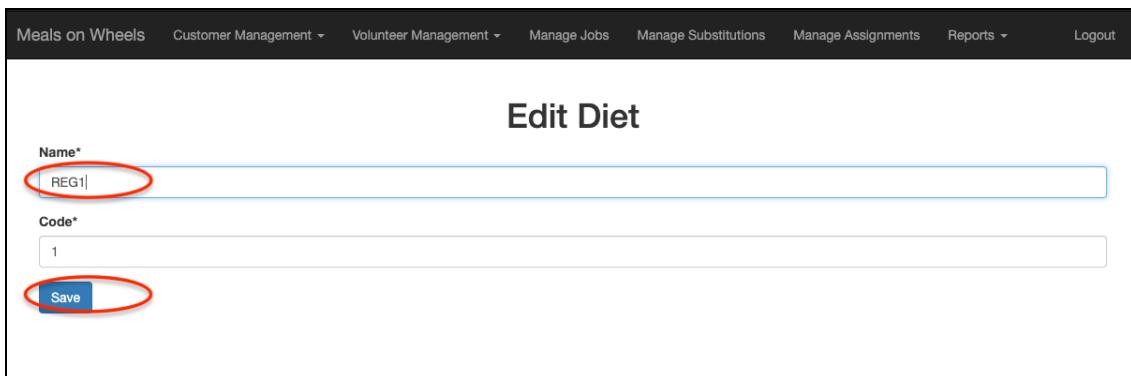
The screenshot shows a table titled "Manage Diets" with three columns: "Diet", "Code", and "Delete". The "Diet" column contains entries: REG (circled in red), VEG, and GF. The "Code" column contains entries: 1, 2, and 3. The "Delete" column contains three "Delete" buttons, each with a red "X". A "Create Diet" button is located in the top right corner.

Diet	Code	Delete
REG	1	<input type="button" value="Delete"/>
VEG	2	<input type="button" value="Delete"/>
GF	3	<input type="button" value="Delete"/>



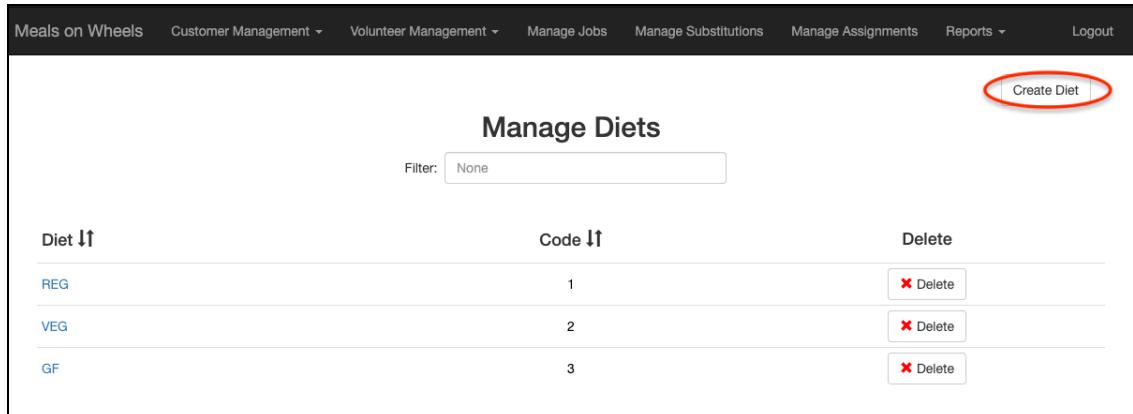
The screenshot shows the "Edit Diet" form for the diet named "REG". It has two fields: "Name\*" containing "REG" and "Code\*" containing "1". A blue "Save" button is at the bottom.

## 3. Edit a diet



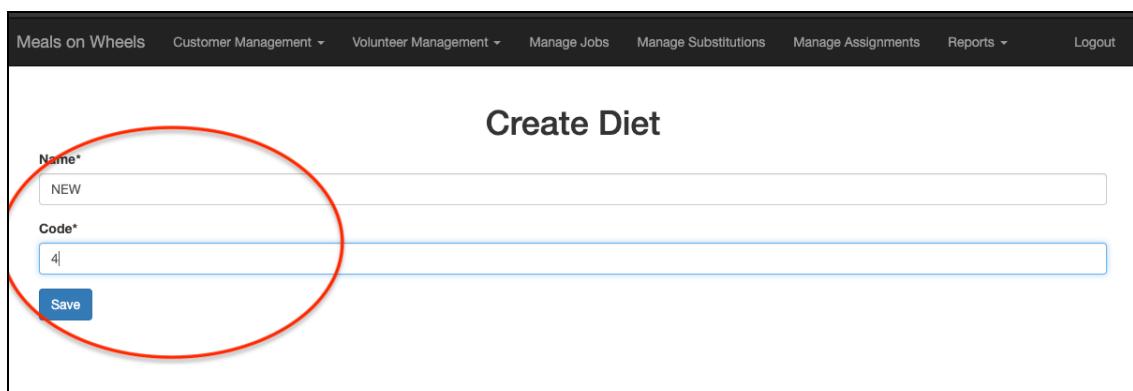
The screenshot shows the "Edit Diet" form again, but now the "Name\*" field contains "REG1" (circled in red). The "Code\*" field still contains "1". The blue "Save" button is highlighted with a red circle.

## 4. Create a new diet



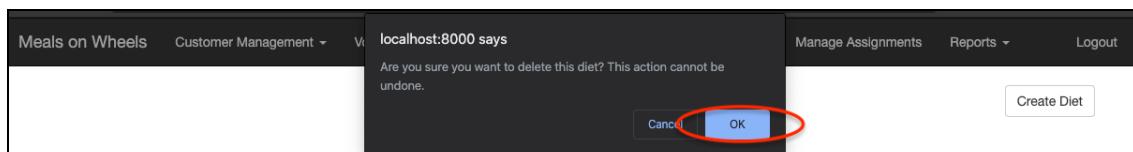
The screenshot shows the 'Manage Diets' page. At the top right, there is a red circle around the 'Create Diet' button. Below it, the page title 'Manage Diets' is centered. A filter input field with 'None' selected is present. The main content area displays a table with three columns: 'Diet' (sorted by name), 'Code' (sorted by code), and 'Delete'. The data rows are:

Diet	Code	Delete
REG	1	<input type="button" value="Delete"/>
VEG	2	<input type="button" value="Delete"/>
GF	3	<input type="button" value="Delete"/>

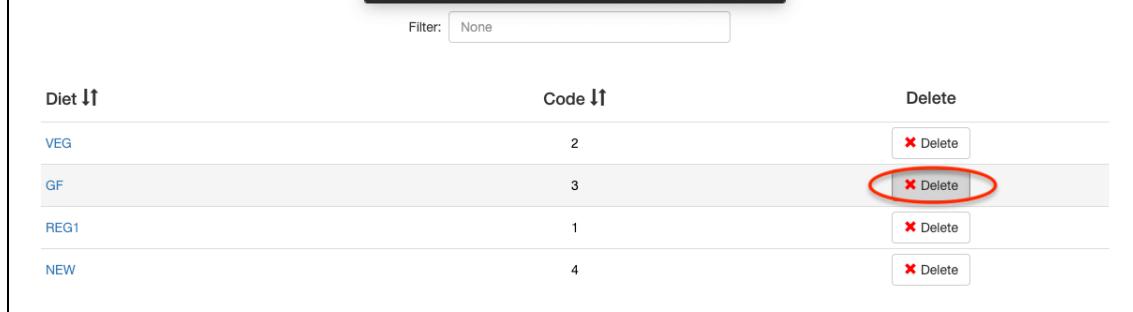
  


The screenshot shows the 'Create Diet' form. It has two input fields: 'Name\*' containing 'NEW' and 'Code\*' containing '4'. A red circle encloses these two fields. Below them is a blue 'Save' button.

## 5. Delete a diet



A confirmation dialog box from 'localhost:8000 says' is displayed, asking if the user is sure they want to delete the diet. The 'OK' button is highlighted with a red circle. The background shows the 'Manage Diets' table with the 'NEW' diet row selected.

The screenshot shows the 'Manage Diets' page again. The 'NEW' diet row is highlighted with a red circle around its 'Delete' button. The other diets listed are VEG, GF, and REG1.

# Reports

## Daily Count Sheet

The daily count sheet generates a count of the meals for each diet type on a particular date. If the report generated is for a Friday, this report will also add weekend meals.

A screenshot of the Meals on Wheels software interface. At the top, there is a navigation bar with links: Meals on Wheels, Customer Management, Volunteer Management, Manage Jobs, Manage Substitutions, Manage Assignments, Reports (with a dropdown arrow), and Logout. The Reports dropdown menu is open, showing several options: Daily Count Sheet (which is circled in red), Job Overview Report, Substitutions Report, Monthly Billing Report, Client Birthday Report, Volunteer Birthday Report, and Volunteer Join Date Report.

The user should choose the desired date to generate the report for.

A screenshot of the "Generate Daily Count Report" page. The page has a header "Generate Daily Count Report". Below the header, there is a section labeled "Select Date:" with a text input field containing the value "04/12/2020". A blue "Generate" button is located below the input field. Both the "Select Date:" section and the "Generate" button are circled in red.

The report is generated.

<b>MOW Daily Count Report</b>	
Generated: Sunday, Apr. 12, 2020 at 08:09 p.m.	
Diet	Count
Regular (R)	122
Mechanical Soft/Diabetic (MS/D)	4
Consistent Carbohydrate/Diabetic (CCD)	25
Sodium Restricted (SR)	8
Consistant Carbohydrate/Sodium Restricted (CC/SR)	7
Low Fat/Low Sodium--Heart Healthy (HH)	12
Mechanical Soft (MS)	9
Renal/Diabetic (N/D)	1
Vegetarian (V)	11
Renal/Sodium Restricted (N/SR)	1

### *Job Overview Report*

The job overview report shows the volunteers assigned to a job for all jobs over a desired date range.

The screenshot shows a software application window for 'Meals on Wheels'. The top navigation bar includes links for 'Customer Management', 'Volunteer Management', 'Manage Jobs', 'Manage Substitutions', 'Manage Assignments', 'Reports' (with a dropdown menu), and 'Logout'. Below the navigation, there are sections for 'Announcements' (which says 'There are no announcements.') and 'Substitution Requests'. A dropdown menu under 'Reports' lists several options: 'Daily Count Sheet', 'Job Overview Report' (which is circled in red), 'Substitutions Report', 'Monthly Billing Report', 'Client Birthday Report', 'Volunteer Birthday Report', and 'Volunteer Join Date Report'.

The user should choose the desired date range to generate the report for.

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

## Generate Job Overview Report

Begin Date: 04/12/2020

End Date: 04/12/2020

**Generate**

The report is generated.

**MOW Job Overview Report**

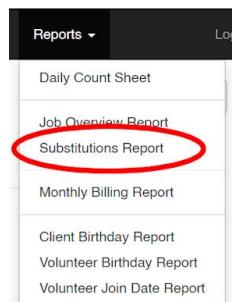
Generated: at  
\*\* denotes volunteering via substitution

**Route (Monday, Apr. 13, 2020)**

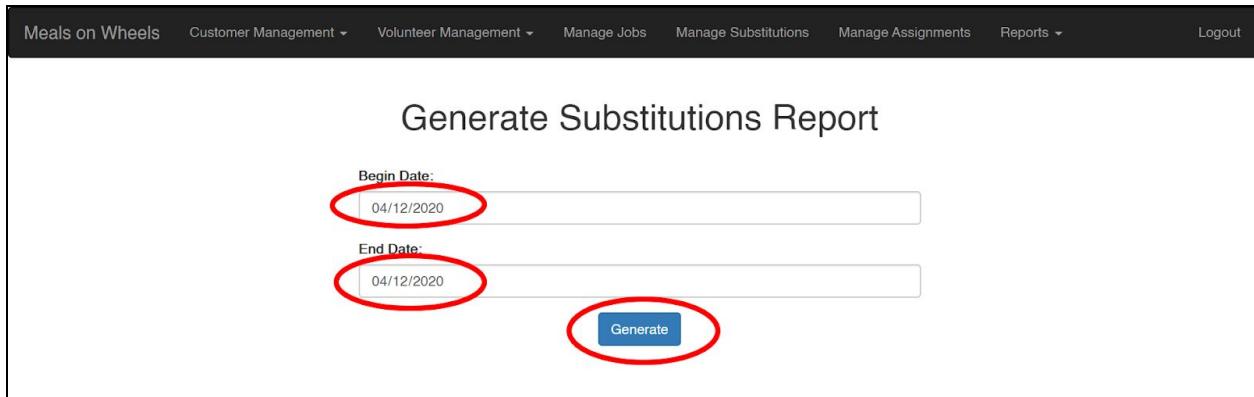
Job Name	Volunteers
Route 1	Volunteer 393
Route 2	No Recurring Assignment
Route 3	Open Substitution Request for Volunteer 92
Route 4	OPEN JOB
Route 5	Volunteer 28** for Volunteer 338
Route 6	Volunteer 233
Route 7	Volunteer 335

### *Substitutions Report*

The substitutions report generates the substitutions created for a job for all jobs over a desired date range. The report lists the job, the original assignment, and the substitute.



The user should choose the desired date range to generate the report for.



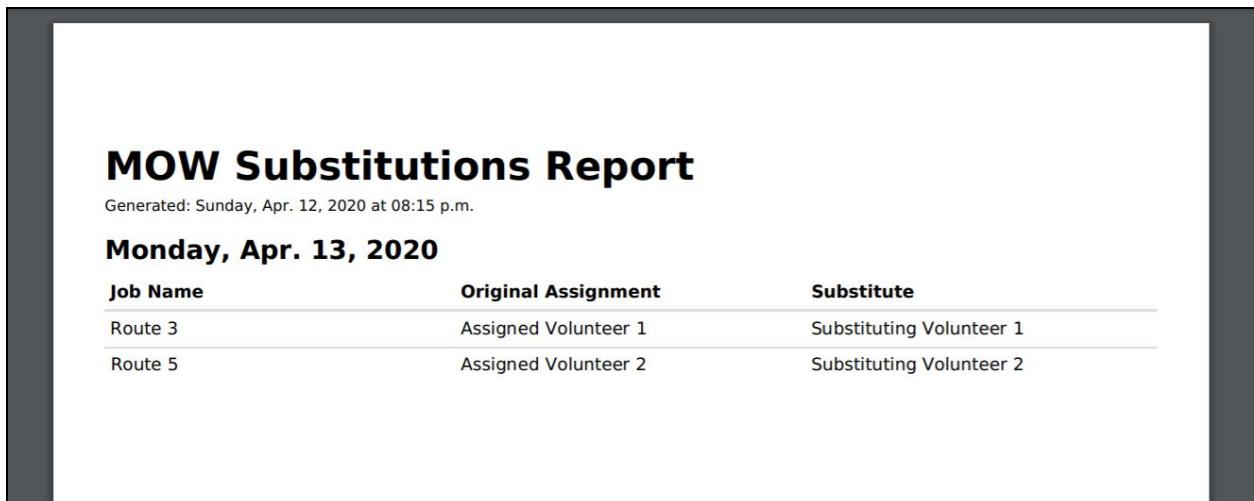
Meals on Wheels Customer Management ▾ Volunteer Management ▾ Manage Jobs Manage Substitutions Manage Assignments Reports ▾ Logout

## Generate Substitutions Report

Begin Date:

End Date:

The report is generated.

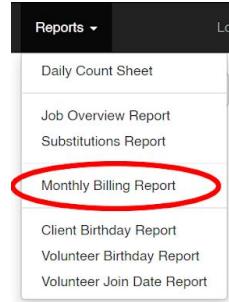


Job Name	Original Assignment	Substitute
Route 3	Assigned Volunteer 1	Substituting Volunteer 1
Route 5	Assigned Volunteer 2	Substituting Volunteer 2

### *Monthly Billing Report*

The monthly billing report generates information pertaining to billing over a desired date range. The information includes the total number of meals, the number of meals per customer, the number of meals per payment type, and the number of meals per day.

## Section 2: Staff



The user should choose the desired date range over which to generate the report.

A screenshot of a web-based reporting interface titled 'Generate Monthly Billing Report'. It features two input fields for dates: 'Begin Date' containing '04/12/2020' and 'End Date' also containing '04/12/2020'. Below these fields is a blue 'Generate' button. Both the 'Begin Date' and 'End Date' fields are circled with a red marker.

The report is generated.

A screenshot of a generated 'Billing Report' document. At the top, it says 'Billing Report' and 'Generated: Sunday, Apr. 12, 2020 at 04:42 p.m.'. Below that, it shows the 'Range: April 1, 2020 to April 1, 2020' and 'Total Meals: 191'. A table follows, with columns 'Date' and 'Number of Meals'. The single entry is 'April 1, 2020' and '191'. Below the table, it says 'Self Pay: 9 meals for 9 clients' and lists six customers with their meal counts, payment method (Self Pay), and route. To the right of the table are three circular buttons with icons: a left arrow, a plus sign, and a minus sign. The entire report is framed by a dark border.

### *Client Birthday Report*

The client birthday report generates a list of all the clients' birthdays for a desired month.

The screenshot shows the software's main navigation bar at the top with various management links. Below the navigation is a section titled "Announcements". Under "Announcements", there is a message about food availability and another message about volunteers not eating food. At the bottom of this section, it says "This is an example announcement." To the right of the announcements is a "Reports" dropdown menu. The "Client Birthday Report" option is circled in red.

The user should choose the desired month to generate the report for.

This screenshot shows a specific report generation page. It has a title "Generate Client Birthday Report". Below the title is a dropdown menu labeled "Month\*" with "January" selected. A blue "Generate" button is located below the dropdown. The entire input area is circled in red.

The report is generated.

This screenshot displays the generated "MOW Client Birthday Report" for January. The title is "MOW Client Birthday Report" and it states "Generated: Sunday, Apr. 12, 2020 at 08:16 p.m.". The section "January Birthdays:" lists six entries, each with a day (all are 1), a birthdate (all are Jan. 1), a name, and a route (all are None or Route 14). The entire report is framed by a thick black border.

Day	Birthdate	Name	Route
1	Jan. 1, 1900	Customer 175	None
1	Jan. 1, 1901	Customer 340	None
1	Jan. 1, 1902	Customer 443	None
1	Jan. 1, 1902	Customer 467	None
1	Jan. 1, 1903	Customer 414	Route 14
1	Jan. 1, 1928	Customer 279	None

### *Volunteer Birthday Report*

The volunteer birthday report generates a list of all the volunteers' birthdays for a desired month.

## Section 2: Staff

The screenshot shows the software's navigation bar with various management options like Customer Management, Volunteer Management, and Reports. The Reports dropdown is open, displaying several report types: Daily Count Sheet, Job Overview Report, Substitutions Report, Monthly Billing Report, Client Birthday Report, **Volunteer Birthday Report**, and Volunteer Join Date Report. The "Volunteer Birthday Report" option is circled in red.

The user should choose the desired month to generate the report for.

This screenshot shows the "Generate Volunteer Birthday Report" page. It features a dropdown menu labeled "Month\*" with "January" selected. A red oval highlights this dropdown. Below it is a "Generate" button.

The report is generated.

This screenshot displays the generated "MOW Volunteer Birthday Report" for January. At the top, it says "Generated: Sunday, Apr. 12, 2020 at 08:17 p.m.". The section titled "January Birthdays:" lists five volunteers with their birthdates:

Day	Birthdate	Name
1	Jan. 1, 1900	Volunteer 12
1	Jan. 1, 1900	Volunteer 21
1	Jan. 1, 1900	Volunteer 22
1	Jan. 1, 1900	Volunteer 26
1	Jan. 1, 1900	Volunteer 60

### *Volunteer Join Date Report*

The volunteer join date report generates a list of all the volunteers and their join date.

Meals on Wheels Customer Management Volunteer Management Manage Jobs Manage Substitutions Manage Assignments Reports Logout

**Announcements**

Meals on Wheels is in need of apple  
Posted April 11, 2020. [Delete](#)

Volunteers: Please do not eat the food you bring.  
Posted April 11, 2020. [Delete](#)

This is an example announcement.  
Posted April 12, 2020. [Delete](#)

Create an Announcement

The report is generated.

**MOW Volunteer Join Date Report**  
Generated: Sunday, Apr. 12, 2020 at 07:45 p.m.

Join Date	Name
Jan. 1, 1977	Volunteer 163
Jan. 1, 1977	Volunteer 238
Oct. 21, 1988	Volunteer 198
Jan. 1, 1992	Volunteer 180
Jan. 1, 1993	Volunteer 148
Jan. 1, 1994	Volunteer 73
March 27, 1995	Volunteer 206
Jan. 1, 1997	Volunteer 113
Jan. 1, 1997	Volunteer 165
Jan. 1, 1999	Volunteer 47
Jan. 1, 1999	Volunteer 122

## Filtering and Sorting Tables

Filtering and sorting is enabled on the following tables: Manage Assignments, Manage Substitutions, Manage Volunteers, and Manage Customers. Each table uses the same interface for filtering and sorting; Manage Assignments and Manage Volunteers also allow users to email volunteers shown on the screen.

### *Filtering*

The Manage Assignments, Manage Volunteers, Manage Customers, and Manage Substitutions tables can all be filtered. To filter rows in a table, begin typing in the “filter” field located just below the table’s heading. Users do not need to click any buttons to apply filters after typing; filters are applied automatically. Separate terms with “**&&**” to apply multiple filters at once. When filters are applied, matching rows will **contain at least one of the terms**. When applying filters for terms that may be contained within others (i.e. “Route 1” and “Route 11”), add a space to the end of such terms so the longer terms do not match. For example, “Route 1 ” will not match “Route 11”.

### Special Filtering Cases:

- *Manage Assignments Table*
  - The manage assignments table's filtering has been adjusted so that items like “3rd Wed” will match rows that contain “Wednesdays”. This functionality is applied for every day of week.
- *Manage Customers*
  - Though addresses are not visible, they can be used in filters.

### *Sorting*

Users can sort rows in tables by data in particular columns. To sort, click on the column’s name (arrows will appear next to the name if the column’s data is sortable). Sorting order toggles increasing and decreasing.

Volunteer ↑	Cell	Email	Delete
admin user		iamadmin@admin.admin.com	<input type="button" value="Delete"/>

## Using Searchable Dropdowns

Across the portal, many dropdown selection menus are searchable, allowing the user to enter in information without having to scroll through a long list of data. These fields will display a short list when clicked, and place a cursor indicating that the user can type. By typing in characters to search for, the dropdown will search for any relevant data that contains the text you have entered and display the results below the text field. The user can then click on a result to select it. If no data matches the search, no options will be generated. To clear a current search, the user can press the “X” on the right hand side of the text field.

## Emailing Volunteers

Users are given options to email volunteers in many spots on the portal. In all cases, clicking on the email button will open the user's default mail client with the bcc box populated with volunteer emails. From here, the user can compose and send an email just as he or she normally would.

*Note: At the time of deployment, not all volunteers had emails in the database. Also, users will need to set up their mail clients to use the email feature.*

The Manage Volunteers and Manage Assignments tables both have an “Email Shown Volunteers” button. When this button is pressed, the mail client is opened as explained above with all volunteers visible in the table. Users may filter the table to create different combinations of volunteers to email as described in [Filtering](#).

*Note: Users' mail providers may limit the amount of emails they may send in a particular amount of time. For example, GMail has a 500 email daily limit.*

# Volunteers

## Profile

By clicking on the “Profile” link in the header, volunteers can view their information as it was filled out when they signed up for their account. This page is read-only, and it does not include all volunteer information. Notes are not shown.

The screenshot shows a web application interface for a volunteer profile. At the top, there is a dark navigation bar with links for "Meals on Wheels", "My Jobs", "Substitutions", "Profile", and "Logout". The main content area has a white background. It starts with a greeting "Hi, Michael Scott". Below this, there is a table-like structure with 8 rows, each containing a label and a corresponding input field. The labels are: "Username", "Organization", "Address", "Home Phone", "Cell", "Work Phone", "Birthdate", and "Join Date". The input fields contain the values: "dundermifflin", "Dunder Mif", "Scranton, PA, USA", "987-895-8965", "444-444-4444", "456-987-1245", "April 10, 2020", and "April 11, 2020". At the bottom of the form, there is a small note: "If any of this information is incorrect, please contact Meals on Wheels of Charlottesville directly at (434) 293-4364."

Username	dundermifflin
Organization	Dunder Mif
Address	Scranton, PA, USA
Home Phone	987-895-8965
Cell	444-444-4444
Work Phone	456-987-1245
Birthdate	April 10, 2020
Join Date	April 11, 2020

If any of this information is incorrect, please contact Meals on Wheels of Charlottesville directly at (434) 293-4364.

## My Jobs

This page displays jobs that the current volunteer is signed up to work for the current month. The job type is either “Recurring” or “Substitution.”

## Section 3: Volunteers

Meals on Wheels   My Jobs   Substitutions   Profile   Logout

Next month

### My Jobs for April, 2020

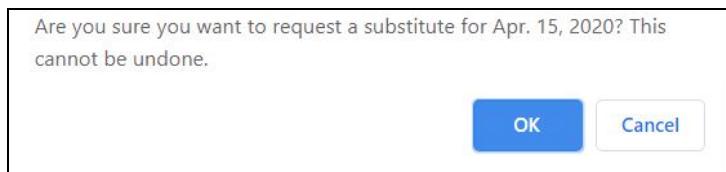
Job	Type	Date	
Packer Cold	Recurring	Apr. 15, 2020	<button>Request Substitute</button>
East	Substitution	Apr. 16, 2020	<button>Request Substitute</button>
Walmart	Recurring	Apr. 16, 2020	<button>Request Substitute</button>
Packer Cold	Recurring	Apr. 22, 2020	<button>Request Substitute</button>
Packer Cold	Recurring	Apr. 29, 2020	<button>Request Substitute</button>

To view jobs for future months, toggle the month using “Next Month” in the top right and “Previous Month.” Note that “Previous Month” does not display for the current month, since the volunteer side does not allow for any historical data to be viewed.

To request a substitute for a currently assigned job, click the “Request Substitute” button for the corresponding job.

Packer Cold   Recurring   Apr. 15, 2020   **Request Substitute**

A pop-up will confirm this action.



The job will then disappear from the “My Jobs” section and will appear as an open job for all volunteers to see.

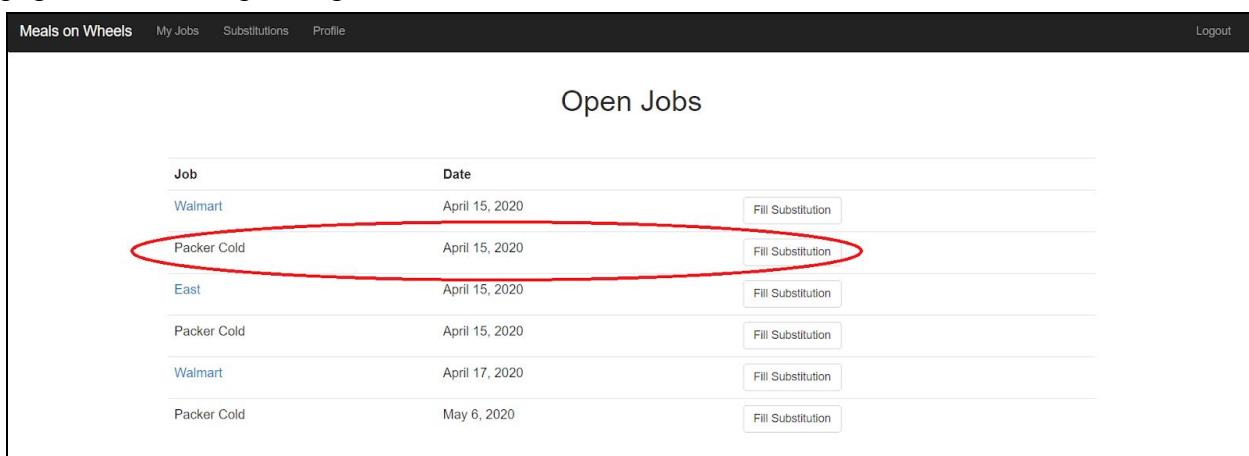
The portal will not allow you to request a substitute less than 48 hours before that job occurs. The following message will pop up.

This job is occurring too soon to request a substitute online. You must request a substitute by calling Meals on Wheels at (434) 293-4364.

OK

## Open Jobs

By clicking “Substitutions” in the header, volunteers can view all jobs that are unassigned. To sign up for one of these jobs, click the “Fill Substitution” button corresponding to that job. This job will be removed from the Open Jobs section and appear under the volunteer’s “My Jobs” page for the corresponding month.



The screenshot shows a web-based application interface for managing volunteer jobs. At the top, there is a navigation bar with links: 'Meals on Wheels', 'My Jobs', 'Substitutions', 'Profile', and 'Logout'. Below the navigation bar, the title 'Open Jobs' is centered. A table lists six unassigned jobs, each with a 'Fill Substitution' button. The first two rows, which correspond to 'Walmart' and 'Packer Cold' on April 15, 2020, are highlighted with a large red oval. The table columns are 'Job' and 'Date'.

Job	Date	
Walmart	April 15, 2020	<input type="button" value="Fill Substitution"/>
Packer Cold	April 15, 2020	<input type="button" value="Fill Substitution"/>
East	April 15, 2020	<input type="button" value="Fill Substitution"/>
Packer Cold	April 15, 2020	<input type="button" value="Fill Substitution"/>
Walmart	April 17, 2020	<input type="button" value="Fill Substitution"/>
Packer Cold	May 6, 2020	<input type="button" value="Fill Substitution"/>

## View Routes

All of the jobs that display as links will redirect to their route page when clicked. This page displays the customers on the route, shows a map of the route, and displays directions at the bottom of the page. Additionally, the route can be opened in Google Maps directly through the “Open in Google Maps” button.

*Note: The button to open in Google Maps will not display if there are more than 10 people on a route (or 3 people when viewed from a mobile device) due to API limitations.*

## Section 3: Volunteers

Meals on Wheels   My Jobs   Substitutions   Profile   Logout

View Specific Day:

### Walmart

Order	Customer	Address
1	Ozamataz Buckshank	975 Emmet St N, Charlottesville, VA 22905
2	Ibrahim Mouzoos	1576 Rio Rd E, Charlottesville, VA 22901
3	Swirvithan L'Goodling-Splatt	350 Woodbrook Dr, Charlottesville, VA 22901

A Google Map showing a delivery route. The route starts at a Walmart location (marked with a red pin) and branches out to three customer addresses (also marked with red pins). The map includes labels for the University of Virginia, Barracks, Commonwealth, and various roads like Emmett St N, Barracks Rd, and University Park. A legend at the top left shows 'Map' and 'Satellite' options. At the bottom right, there are zoom controls (+, -, Open in Google Maps), a copyright notice (Map data ©2020), and links for Terms of Use and Report a map error.