## Santropol Roulant's Admin Prod Web App User Guide

A user guide for the Prod App currently live at Santropol Roulant to administer and facilitate volunteering shifts with the Roulant's Meals on Wheels Program. No use of ChatGPT or any Al-based tooling was used in the creation of this report.

Authored by: Jared Balakrishnan with assistance from Béatrice Daudelin and Moiz Shaikh

## Introduction

This guide is designed to help employees in the Meals on Wheels program (MoW) at Santropol Roulant (referred to as "the Roulant" hereafter) to painlessly facilitate and administer volunteering shifts falling under the purview of the program, using the newly designed Vol App (referred to as "App" or "the app" hereafter).

This guide can serve as an efficient onboarding companion to new employees at Santropol Roulant, as well as a living source of bugs and suggestions that can be used for the improvement of the App in the long run.

## Overview of Santropol Roulant and the MoW Program

Santropol Roulant describes itself as an "intergenerational community food hub" where food is grown, prepared, and delivered. In doing so, the Roulant strives to create a continuum of engaging services that help build a stronger social fabric, and increase food security and inclusion for Montrealers.

The Meals on Wheels Program (MoW) forms the core of the organization, and happens to be the beginning act of the Roulant in 1995. It strives to address the issues pertaining to food insecurity particularly among the elderly population,

whilst also making sure that nobody is left behind thereby building a strong, social fabric. Today, powered by volunteers, the Roulant prepares and delivers meals 5 days a week, all 52 weeks of the year to Montrealers in need!

## Volunteers and the Meals on Wheels Program

How does it work?

In order to receive meals from the Roulant, a customer must:

- Live in one of the eight designated Montréal neighborhoods serviced by the Roulant.
- Be recognized as an individual with a loss of autonomy, which includes but are not limited to situations such as reduced mobility, cognitive impairment, aging or convalescence.
- Have a referral from a healthcare professional. An employee at the Roulant will work with the client to have them on-boarded to the system.

For 5 days a week, 52 weeks a year, volunteers at the Roulant then:

- Cook Meals: Volunteers prepare nutritious meals in accordance with clients' special needs and preferences across two shifts (in the morning and afternoon) at the Roulant's kitchen.
- Deliver Meals: Volunteers deliver these meals to clients in shifts around dinner time to clients' doorsteps using a variety of transit methods ranging from foot to public transport and private cars.

## More about the MoW Volunteering Program

The two kinds of volunteering opportunities available with the Meals on Wheels program at the Roulant are the Kitchen and Delivery programs.

With the Kitchen program, volunteers are in charge of preparing meals according to the <u>meal calendar</u> in accordance with the clients' needs. There are two shifts 5 days a week; one runs from 9:30 AM to 12:30 PM and the other runs from 1:30 PM to 4:30 PM. Kitchen shifts are capped at 7 volunteers each.

On the other hand, in the Delivery program, volunteers are in charge of delivering meals to the clients' doorsteps. There is only one volunteering shift (5 days a week) that runs from 2:45 PM to 6:30 PM. Volunteers who will be using a car for deliveries are required to have a valid driver's license if they plan on driving. Delivery shifts are capped at 11 volunteers per shift.

In order to be considered eligible to volunteer with the Meals on Wheels program at the Roulant, an individual must fulfill the listed requirements:

- Fill out the volunteering application. The application can be found <a href="here">here</a> on the Roulant's website.
- Attend a Welcome Session offered online or at the Roulant.
- If a volunteer is interested in working the kitchen shifts in order to prepare meals, they need to attend another session with a Roulant employee before being able to work in the kitchen.
- If a volunteer is interested in delivering meals to clients, they need to

## The Vol App

#### The Old

Previously, employees at the Roulant would circulate a well-annotated, detailed Google Spreadsheet that eligible volunteers could sign themselves up on. This spreadsheet can be seen here: Volunteer schedule 2024.

#### The New

A new web application (the VolApp) has been developed to make the administration of volunteering shifts at the Roulant a seamless affair. There are two sides to this application:

- The volunteer-facing side of this application allows vetted, approved volunteers to sign up for shifts at the Roulant. A detailed user guide for this application can be found here.
- The administration-facing side of this application (called the Prod App hereafter) allows employees at the Roulant to efficiently administer, keep track and facilitate volunteering shifts at the Roulant. The scope of this user guide is restricted to the Prod App.

## The Prod App

Accessing the Prod Application

The Prod App has two versions:

- The QA version of the Prod App is used as a testing version of the actual Prod App. This can be used when a new employee is learning how to use the Prod Application, and can be accessed <a href="here">here</a>.
- The version in production is the version of the app used to actually
  administer the shifts that will be seen and used by the volunteers. It can be
  accessed <a href="here">here</a>.

What can the Prod Application do?

The Prod Application can be used to:

- View information about approved, vetted volunteers in the system.
- Create and Administer shifts that the aforementioned volunteers can sign up for through the Vol App.

 Send support requests in the event the user is experiencing bugs while using the application.

## **Viewing User Information**

This functionality lists detailed information about volunteers that are approved and vetted to work with the Roulant. The information listed here includes:

- Biographical Information
  - o Preferred Language
  - Preferred Pronouns
  - Name (First, Last)
  - Contact Information (Phone and Email)
  - Important Advisories
    - This includes flags such as a volunteer being a minor, a volunteer with mobility issues, or a volunteer who is being compensated for their work etc.

# Administering Shifts

This is the main functionality of the Prod App. A user is allowed to:

- Create Shifts (Kitchen or Delivery Shifts)
- Delete Shifts
- View all shifts created (old, new , pending)
- Manually add volunteers to shifts
- Get a summary of volunteers signed up for a shift

# The Visual, Annotated How-To

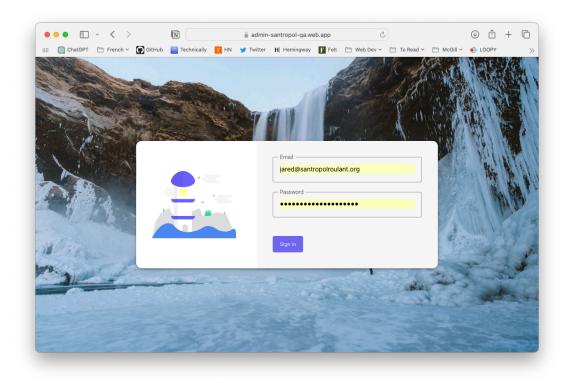
Navigating along the Prod App

## **Step 1: Login to the Prod App.**

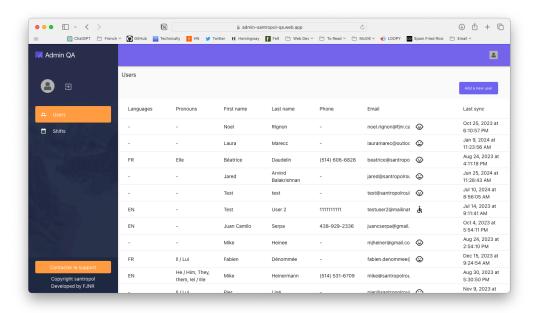
QA Version - <a href="https://admin-santropol-qa.web.app/">https://admin-santropol-qa.web.app/</a>

Volunteer-Facing Version: <a href="https://admin-santropol-prod.web.app/">https://admin-santropol-prod.web.app/</a>

Fill out your login credentials into the highlighted boxes on the form that appears. Hit the Sign in button when done:

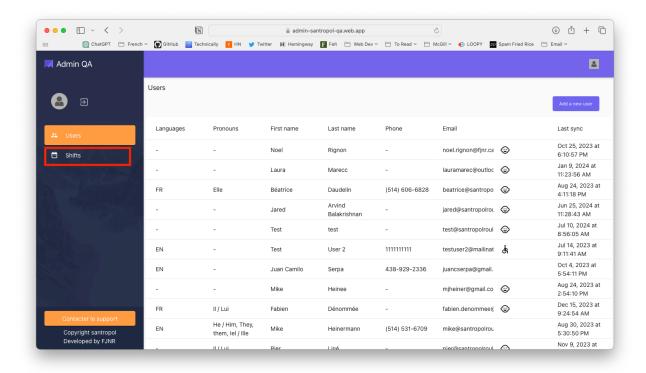


Upon logging in successfully, the landing page you will be directed to is the View Users page, as can be seen here:

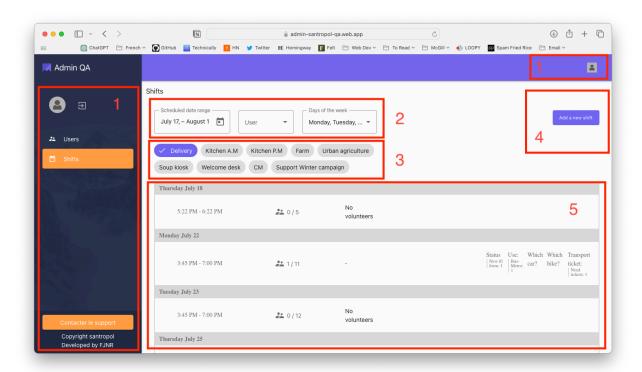


Step 2: Navigate to the Shifts page by clicking on the Shifts button.

If logging into the app for the first time on a specific day, there will be a lag of about 10 seconds before the page loads; this is normal and is not an error.



You will now be brought to the Shifts page, which looks like this:



Annotations of this page are:

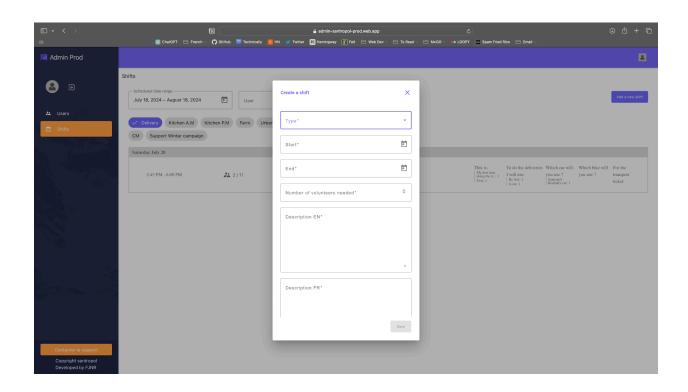
- 1: The user navigation panel. A user can:
  - Navigate to the Users page using the Users button.
  - Navigate to the Shifts page using the Shifts button.
  - Send an email to the support team by clicking the "Contacter le support" button.
  - Log Out of their account by clicking on the human profile button.
- 2: Date and User Controls. A user can:
  - Filter ALREADY CREATED shifts BY DATE using the Scheduled Date Range filter.
  - Filter ALREADY CREATED shifts BY VOLUNTEER NAME using the USER filter.
  - Filter ALREADY CREATED shifts BY DAY OF THE WEEK using the Days of the Week filter.
- **3: Program Filters.** A user can:
  - Filter ALREADY CREATED shifts BY ROULANT PROGRAM. For the
     Meals on Wheels program, the applicable options are restricted to:
    - Delivery
    - Kitchen A.M.
    - **■** Kitchen P.M.
- 4: Adding New Shifts. A user can:
  - Create and administer shifts by clicking on the button that states so.
  - Clicking the button leads to a flow that is discussed later on in this document.
- 5: Shift Overview. Here, a user can:
  - View a list of all shifts that have been created. More specifics about the shift can be found here. These specifics will be discussed in a later section of this document.

## Creating and Administering Shifts

Step 1: Navigate to the Shifts page as per the instructions in the above section.

Step 2: Click the *Add a new shift* button on the top right section of the Shifts page.

You will now be faced with a page that looks like this:



Step 3: Fill out the necessary information for all of the form fields.

#### **IMPORTANT NOTE:**

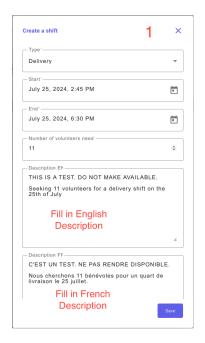
### • For Delivery Shifts:

- o Fill in the number 11 for the field *Number of volunteers needed*.
- The start time and end time in the Start and End fields should always
   be 2:45 PM (14:45) and 6:30 PM (18:30) respectively.

#### • For Kitchen AM/PM Shifts:

- Fill in the number \_\_ for the field Number of volunteers needed.
- The start time and end time in the *Start* and *End* fields should be:
  - 9:30 AM and 12:30 PM for the **Kitchen AM Shift**
  - 1:30 PM and 4:30 PM for the Kitchen PM Shift

In the event a given shift has been greenlit to have more volunteers than is necessary, that change should be made manually afterwards. The additional volunteers will not be listed in the summary pane of the Shifts page.







Step 4: Decide on the Repetition Frequency of the Shift.

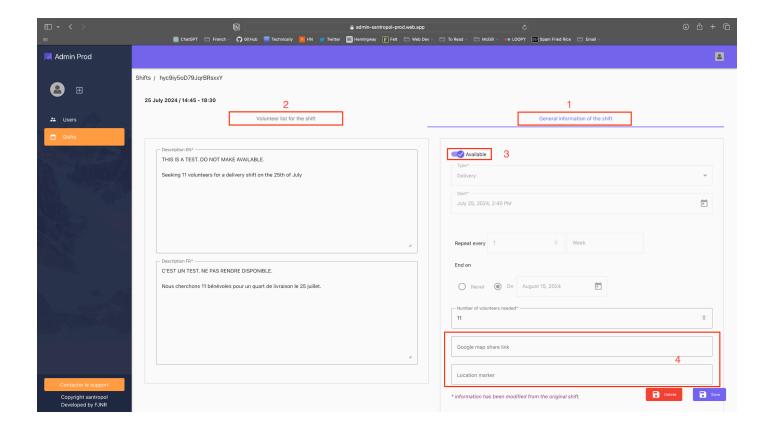
Fill in the repeat frequency of a given shift. In order to have a better understanding of these dates, please contact a manager with the Meals on Wheels program.



In the above image, as an example, the shift is slated to repeat every week until August 15, 2024.

Step 5: Confirm Shift-related Information.

Upon filling out the necessary form fields from the previous page, the user will be presented with the following page:

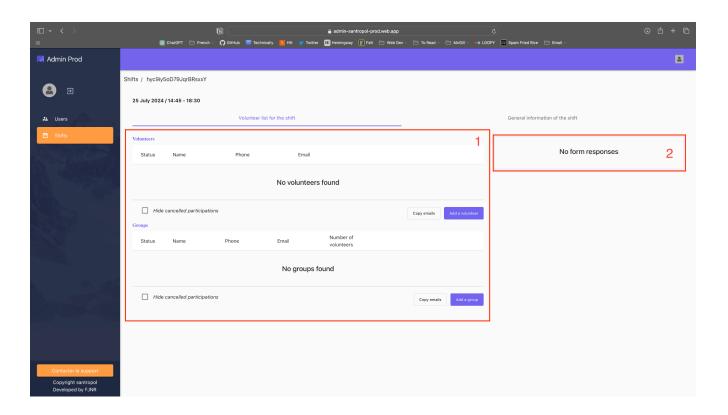


In the above image, the annotations are explained as follows:

- 1 General Information of the Shift: This is a clickable field, and this is the landing page when the user clicks the save button in the previous page.

  Here:
  - The user can make the shift available to all volunteers or make it unavailable by toggling the Available Button (marked 3).
  - The user can also add a Google Maps link and a location marker for the volunteers to assemble (marked 4). However, in the case of all delivery shifts or kitchen shifts, the origin is the Roulant.
- 2 Volunteer List for the Shift: This is also a clickable field, leading to a different page which will be discussed in Step 6.

After confirming all information in this page looks correct, the volunteer can then click on #2 (Volunteer list for the shift). The user will be led to the page shown below:



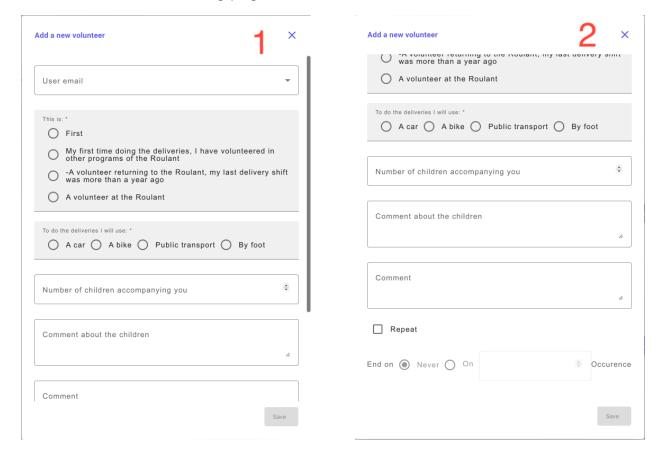
#### In the above page:

- #1 is the section of the page where volunteers (individual as well as groups) who sign up for a given shift will appear. It is also possible to manually add volunteers using the *Add a Volunteer* (in the case of individuals) or *Add a Group* button (in the case of groups) respectively.
- #2 is a section of the page with a summary of the responses submitted by volunteers. This information feeds the summary pane in the main Shifts page as previously mentioned.

Step 6: Check and Confirm Volunteer List for the Shift.

If the shift is made available to all eligible volunteers, they will be able to sign up for these shifts through the Vol App themselves. They will need to answer a series of questions, the responses to which will show up here once filled as shown subsequently.

In the event a Roulant MoW employee needs to add volunteers manually, they will first need to click the *Add a Volunteer* button. Upon doing so, The user will be faced with the following page:



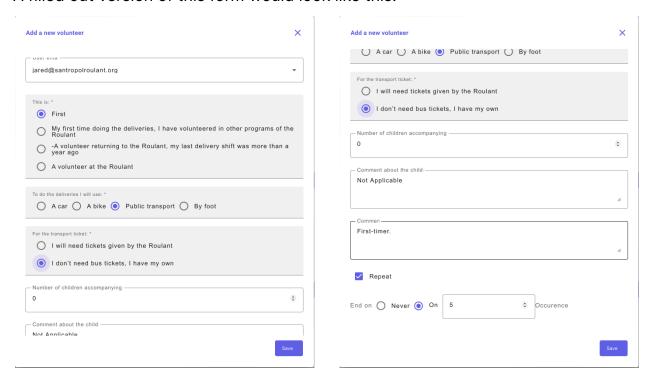
#### **Delivery Shifts**

Please note that in the case of delivery shifts, each option in the *To the deliveries I will use* will bring a series of options:

- If user chooses A Car, they will be asked to select one of:
  - "Santropol Roulant's car"

- If the user selects this option, they will be asked to check two boxes in order to ensure compliance with the Roulant's policies and Québec's provincial driving laws:
  - I am more than 25 years old
  - I have a driving license
- o "My own car"
  - If the user selects this option, they can proceed with the rest of the form.
- If user chooses A bike, they will be asked to select one of:
  - "My own bike"
  - "Santropol Roulant's bike"
- If user chooses Public transport, they will be asked to select one of:
  - "I will need tickets given by the Roulant"
  - "I don't need bus tickets, I have my own"
- If user chooses By foot, the user can proceed with the rest of the form.

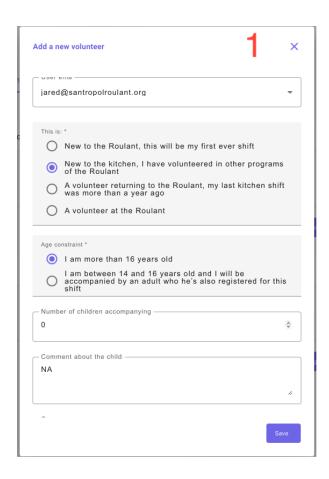
A filled out version of this form would look like this:

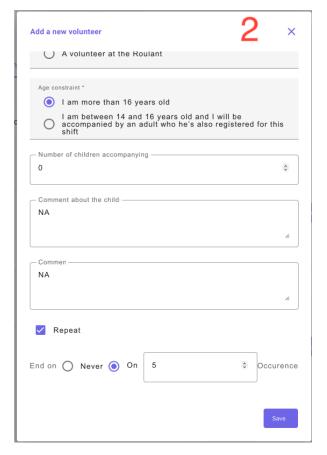


#### Kitchen Shifts

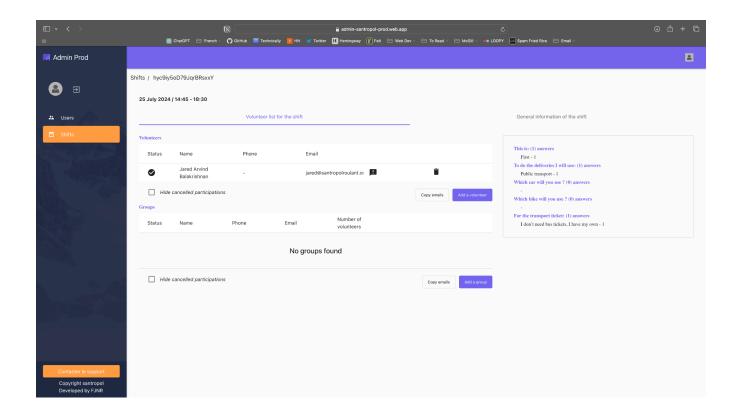
In the case of a kitchen shift, the user will have a different set of questions which asks them if this is their first kitchen shift, and if they are over the age of 16. To volunteer in the kitchen at the Roulant, a volunteer must be at least 16 years of age, or be accompanied by an adult who is also registered for the same kitchen shift.

A filled out version of this form would look like this:





Upon hitting the save button, the user will be able to see the volunteer manually added, in addition to their responses generating the shift summary:



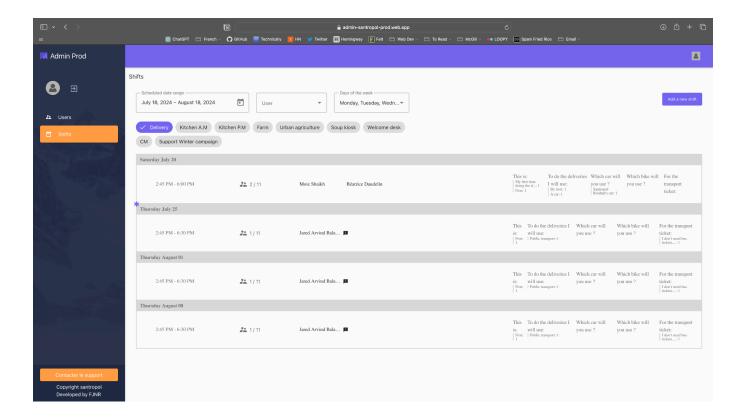
Step 7: Save the Shift.

Navigate back to the General Information of the Shift page, and hit the Save button at the bottom right to save the shift! (or use the red delete button to delete the shift if necessary!)

Step 8: View Shift Confirmation on the Shifts Summary Page

Navigate to the main Shifts page. You should now be able to see the shift you just added on this page, including any recurring occurrences. In addition, you will also be able to see specifics regarding the transportation related questions (in the case of delivery shifts) here.

Please use the summary generated to check off your pre-shift checklists!



# Troubleshooting

In the event any functionality in the application does not work in the desired way:

- First, please try repeating the action a couple of times. It is possible that things might be a bit slow due to systemic issues such as server latency.
- See if you are able to reproduce the error. If you are still unable to perform your desired action, please register the bug in the below linked Bugs section.

 Additionally, please also hit the "Contacter le support" button on the bottom left corner to send an email to the developers letting them know of the bug with as much detail as possible.

## Bugs

Below listed are the active bugs observed while using the application in its current state:

View Users to Add new User action leads to a recursive redirect loop.

Issue: Upon navigating to the "Users" page after logging in, clicking on the "Add a new user" button in the top right corner of the webpage opens a modal which instructs the user to click a link.

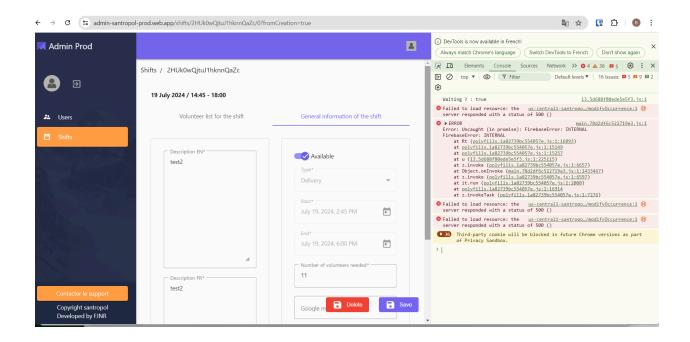
Clicking on the aforementioned link does nothing, and brings the user back to the same Users page in a new window.

A video has been captured where this bug can be re-created:

Creating a Shift fails randomly.

Issue: Upon following the necessary steps to create a shift, the shift does NOT get created. This seems to be happening at random, and a look at the developer console through the browser points to a POST request server error in Firebase.

Image of the Error being encountered by the user:



# Potential Improvements for the Future

This section lists potential improvements for the application in the long run. These suggestions were picked up from repeated usage of the application, as well as multiple user interviews in which the authors observed the Roulant's MoW employees use the application and notice the pain points in their user experience.

### 1. Standardize Language throughout the Application

#### What is it?

Currently, when a user is logged into the application, everything happens to be in English. However, the *Contacter le support* button to seek help, and the *Sé deconnecter* button to log out of the application are available only in French. This is a visible pain point for Anglophone users of the application.

Who does it affect?

Mainly anglophone users of the application.

What type of issue is it?

Frontend Development issue.

Has this been fixed?

NO.

#### 2. Introduce presets while creating a shift.

What is it?

Currently, the Roulant operates on fixed shifts. By fixed shifts, the Meals on Wheels program has strictly pre-defined shift times as well as the number of volunteers the shifts are supposed to be capped at.

For instance, the delivery shifts only happen from 14:45 to 18:30 on Mondays, Tuesdays, Wednesdays, Fridays and Saturdays. This will not change unless the Roulant's MoW Operations team decides to make this change at the organization-level.

When a user creates a shift in the current user experience, they are still required to manually select the time and fill in the number of volunteers every single time. In addition, they are also made to fill out both description fields (English and French) when all of this information is uniform throughout.

User interviews have revealed that making these fields pre-filled or pre-set within the application would help them save time while creating and administering shifts. Who does it affect?

Any user attempting to create a shift.

What type of issue is it?

A combination of frontend and backend issues.

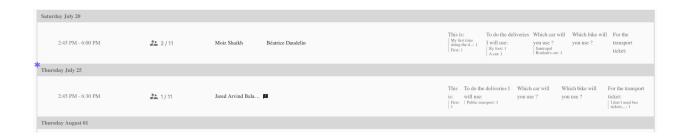
Has this been fixed?

No.

# 3. Present the Shift Summary Information in a more understandable, useful way.

What is it?

Currently, when a Roulant employee creates a shift, a summary is created in the landing page as was discussed before. However, this summary is presented in a "Q and A" manner. For instance:



Roulant employees find this inconvenient. Before a shift begins, they usually check things off their list by seeing who is going to be carrying out deliveries in the car (whether personal or the Roulant car), who is going to be carrying out deliveries by foot etc. Currently, they are efficiently able to do this in their Google spreadsheet tracking system as can be seen below:

AE 6.20							DELIVERIE	(mlas	200 111	į
2:45-6:30							DELIVERIES	(pie	ise wr	ite
RIVER (SR ca		•	-		-	-		-	•	П
RIVER (SR ca		•	-		-	-		-	-	П
RIVER (own ca		-	-	Bill Freeland	ow 🕶	reç 🕶		-	-	П
RIVER (own ca	Claude Thibault	oikı 🕶	reg 🕶		-	-	Claude Thibault	bik 🕶	reg 🕶	П
BIKE/METRO	David Shewan	oikı 🕶	reç 🕶	Chris Perrin	reg 🕶	bik 🕶	David Shewan	bik 🕶	reç 🕶	П
<b>BIKE/METRO</b>	Jean-Mykhael Godin-Ma b	oike 🕶	reg 🕶		-	-		-	-	П
BIKE/METRO		-	-		-	-		-	-	Г
BIKE/METRO		-	-	Bradley Morrice	reg 🕶	bik 🕶		-	-	П
WALK		*	•	Chris Kennedy	reg 💌	in p	Susan Gannon	wa 🕶	reg 🕶	
WALK		-	-	Dan Boothby	wa 🕶	-	Lawrence Halford	reç ▼	in r 🕶	П
WALK		-	-		~	-		~	-	
WALK		-	-		-	-		-	-	L
WALK		•	-		-	-		-	-	
ASK MOW										

In the above screenshot, it is possible to easily deduce that this shift does not have enough drivers, no volunteers using the car owned by the Roulant or enough people delivering food by foot. Whereas in the current summary, it is not.

Making the summary in the Shifts page show things this way would enable Roulant employees to check off their pre-shift checklist much quicker rather than click a button to see which volunteer responded to using what method of transport. Additionally, it only improves their user experience by introducing something familiar to them in the new web app.

Who does it affect?

Roulant employees creating and administering shifts, mainly delivery shifts for the Meals on Wheels Program.

What type of issue is it?

Mostly frontend, a matter of how information is presented to users.

Has it been fixed?

No.

#### 4. Shift Creation could be one, single step instead of two.

What is it?

Currently, creating and confirming a shift (as evidenced by Step 4 and Step 5 in the above annotated, how-to guide) is a two-step process. This could be broken down into a single step.

Who does it affect?

Roulant employees administering shifts.

What type of issue is it?

Frontend + Backend.

Has it been fixed?

No.

#### 5. There is a lot of lag whenever the application is being used.

What is it?

Currently, every time a Roulant employee logs into the web application, there is a lag associated with every step that takes around 5-10 seconds on average to go away each time it is encountered. This latency makes things slow, and creates unnecessary friction for the end user.

This latency is only bound to get worse in the long run considering the application is not even being used to administer Meals on Wheels shifts at the Roulant yet, meaning the creation of more and more records only has the potential to make things slower.

Who does it affect?

Employees using the Prod Admin App.

What type of issue is it?

Backend - this issue is most likely caused by the fact that information best suited to be stored relationally is being stored in a document (NoSQL) model in Firebase. Searching and joining across records in a document database is highly inefficient and constitutes a poor design choice.

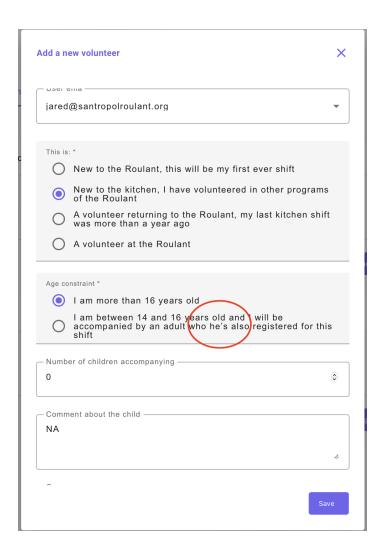
Has it been fixed?

No - It is not advisable to phase out of Firebase considering the application has already been developed. However, the latency is to be fixed immediately before more records get created in Firebase.

# 6. Ensure that all language in the application is gender-neutral. Eliminate all grammatical errors.

What is it?

Upon creating Kitchen shifts in the Prod App, the language centering minors is gendered to only Male guardians. This is unacceptable and does not reflect the gender diversity of the volunteers that serve at the Roulant. There are also a lot of grammatical errors littered throughout the user interface.



Who does it affect?

Employees administering shifts at the Roulant.

What type of issue is it?

Frontend.

Has it been fixed?

No.

7. Include better, proper and usable options for seeking support in the event

an error is encountered.

What is it?

Currently, the only available support option is sending an email to an fjnr.ca

domain-registered address. This is out-of-date, considering the codebase is no

longer owned by FJNR.

In addition, email is the only option; there is no way to offer enough context

except for typing in a wall of text.

There should be a better option to submit bug reports that involve a form which

importantly asks for screenshots or steps taken to recreate the error. This could

be a Google Form (considering the Roulant uses Google Workspace), or the form

of bug-tracking used by the owner of the codebase (ServiceNow or JIRA etc.)

Who does it affect?

All users of the Prod Admin App.

What type of issue is it?

Frontend + Backend.

Has it been fixed?

No.