User Manual for Voluntunity

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Preface

Voluntunity is a website designed to help Southwestern students and community members find nonprofit organizations in the Central Texas area to volunteer for. With this website, users are able to more easily find organizations based on their interests and location preferences than with the document previously published by Southwestern University's Office of Community Engaged Learning. Additionally, administrators are provided with an intuitive user interface for adding, updating, and deleting organization's information from the database.

This document serves as a guide for users who are unfamiliar with the Voluntunity website. Users will be able to find information on how to navigate the website, search using the website, and update the database using the administrator site.

This document is meant to serve as an accurate representation of how to use the Volunitunity website and will be updated as the site itself is updated.

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Perspective Volunteer Functions

This section will describe how to use the Voluntunity website from the end user's perspective.

Navigation

At the top of each page there is a yellow banner to help the user with navigation. On the left, the user will see website's name. If the user would like to return to the landing page, they can do so by clicking on the text. On the right, there is a series of buttons: BROWSE, HOW TO, CONTACT US, and ADMIN LOGIN. The "BROWSE" button allows the user to search all organizations within the database. When the user clicks on "HOW TO", a pop up will appear describing how to use the site along with an embedded video showing them how to use the site. If "CONTACT US" is clicked, the user will be redirected to the website for Southwestern's Office of Community Engaged Learning. If an administrator would like to update the database, they can login by clicking "ADMIN LOGIN".

How To Pop Up

When the user clicks on the "HOW TO" button, a pop up will appear with instructions on how to search for organizations using the site as well as an embedded video demonstrating the steps.

Search from the Landing Page

When the user first reaches the Voluntuinty website, they will see the landing page. Here the user can search for nonprofit organizations by category and/or location. For both options, the user can select their preference by selecting one option from the drop down menu that appears when they click on the box under the corresponding search criteria. The user has the option to specify as little or as much as they would like. The user can select "any category" or "any location" if they wish to search across all of those options. When they are satisfied with their search criteria, they can find organizations that meet these specifications by clicking the "SEARCH" button. They will then be redirected to the results page.

Search from the Results Page

If the user is currently on the results page, they can search the database again with new criteria without having to return to the landing page. This can be done by filling in the information at the top of the results page. Similar to the landing page, there are drop down options for the user to select an organization category and/or location to filter organizations by. The user is free to use any or none of the filter options before clicking "SEARCH". They will be redirected to an updated results page that meets their new search requirements.

Results Page

Whether the user searches from the landing page or the results page, cards with information about the organizations that meet the search criteria will appear on the left side of the page below the refine search form mentioned in the previous section. If there are no organizations that meet the user's search criteria, a message will appear in this location notifying that this is the case and no map will render. A map will be generated on the right side of the results page below the refine search form. Each organization that meets the search criteria and has a physical address on file can be viewed on the map by clicking the "Show on Map" button on the respective organization's result card. The map will automatically center around this location. When the user hovers over the pin, the address for the corresponding organization will appear as a tooltip (small popup by the cursor).

Administrator Functions

This section will describe how administrators can update the database using the administration section of the website.

Login

The database is accessible via the "ADMIN LOGIN" button at the top right of the website. If you are not already signed in, you will be redirected to a page where you will be prompted to enter the administrator username and password. Upon entering the valid login information, you will be able to view the admin site provided by Django. If you are already logged in from a previous time, the page will notify you and you can access the admin site via the "GO" button on the page.

Navigation

Once successfully logged in, you will see Site administration page. Information about groups and users can be found in the "Authentication and Authorization" section. If there is a desire for users to have varying levels of access to the database, the permissions can be set up within the Groups and/or User model. However, the site does not currently utilize this functionality. To view a list of all the users and their accounts, click on "Users". Below this section is a section titled "VolDB". This is where the database models can be viewed, updated, and added to. There is a "Recent actions" section, to the right of the previously mentioned sections, where the administrator can view recent changes they have made to the database.

To return to the main Voluntunity website, click on the "View Site" link at the top right of the page. The administrator will remain logged in, so when "Admin Login" is clicked, they will be able to access the Site administration page without needing to login again. To change the current user's password, click the "Change Password" link to the right of the "View Site" link and follow the prompts on the next page. To logout of the administrator site, click the "Logout" link to the right of the “Change Password” link. If successful, you will be redirected to a page that lets you know that you have been successfully logged out.

View Models

This can be done in one of two ways. The first option is to click on the title of the model under the “VolDB” section (Categories, Locations, Organizations). Alternatively, click on the “Change” link to the right of the desired model. By clicking in either location, a list of all entries of the chosen model will be displayed. At the bottom of the page, there will be links to different pages of entries if there are more in the database than can fit on one page. To see more information regarding a particular entry, click on the blue text of the desired entry.

Finding Organizations

Navigate to the Organizations page. The organizations are listed in alphabetical order. However, because there are currently over 350 organizations in the database, a filter panel was added to facilitate finding organizations faster. To find organizations that are within a specific category, click on the desired category in the panel to the right of the entries. To find organizations that are located in a specific city, select the desired city from the panel. They can be found under the categories. You have the ability to filter by a category and a location but not multiple categories or multiple locations at once. Another method of searching the organizations is by typing their name or word(s) that the desired organization contains into the search bar located above the list of organization names.

Update Organization Entries in the Database

After navigating to the correct page of model entries, click on the blue text of the the category, location, or organization you wish to edit. This will redirect you to a page with the entry’s information. Here, edit any field by typing in the text boxes, selecting from a menu, or checking checkboxes. Once finished updating, scroll to the bottom of the page and click either “Save and add another” to save the changes and add a new entry into the database, “Save and continue editing” to save the changes made so far but stay on the editing page, or “Save” to save changes and return to the list of all entries.

Add New Organization Entries

Adding an entry to a model can either be done from the main Site administration page or the page of model entries. From the main Site administration page, locate the model the new entry should be added to. Then, click on the “Add” link or the green plus icon to the right of the desired model. In both cases, the administrator will be directed to a page to fill in information regarding the new entry. Note that fields with bolded titles are required and fields with titles that are not bolded are optional. If the information is unknown for a required field, place a period in the field. There is an “IsVisible” checkbox in the Organizations model. If it is checked, the organization will be displayed on the website. If it is unchecked, the organization will remain in the database but will not appear in searches. The “IsVisible” option can be useful for organizations that have seasonal opportunities. Once finished entering information, scroll to the bottom of the page and click either “Save and add another” to save the changes and add a new entry into the database, “Save and continue editing” to save the changes made so far but stay on the editing page, or “Save” to save changes and return to the list of all entries.

Delete Existing Organization Entries

Navigate to the correct page of model entries. One or multiple entries can be removed at once by checking the box to the left of the desired entry or entries. Then, select “Delete selected *modelName*” from the “Action” drop down to the left of the page and press “Go”. Alternatively, click on the entry’s blue text. This will direct you to the view and edit page. Scroll to the bottom of the page and click the red “Delete” button. In both cases, the administrator will be prompted to confirm or change their mind about deleting the data before moving forward.

Add Categories and Locations

To add a new city or a new type of volunteer opportunity category, navigate to either the Categories or Locations page and click the gray “Add Category / Location” button at the top right of the page. Type in the name of the new category and click save.

Edit and Delete Categories and Locations

To delete a category or location, from the home page, click either “Categories” or “Locations” then click on the specific city or category you wish to edit or delete. To delete, hit the delete button, and to edit, simply type in the new title and then hit save.

Adding New Users

Adding a new user can either be done from the main Site administration page or the page of users. From the Site administration page locate the AUTHENTICATION AND AUTHORIZATION section and click on the “Add” link or the green plus icon to the right of the Users. On the following page, enter a username and a password, and reenter the password. The site will not allow simple or common passwords, if you enter something like “whatever” you will get an error message that the password is too common and will be prompted to enter a stronger password with the following guidelines:

- 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.

After selecting a password on the bottom right of the screen you can click either Save and add another, Save and continue editing which is where you will add more information and give permissions, or simply Save. When you are editing a user, in the Personal info section enter the First name, Last name and Email address, in the Permissions section select the three checkboxes for Active, Staff and Superuser status, the Important dates section is filled in automatically based on the user's activity. The other way to add a user is from the Site administration page click on the blue Users text which brings up a list of users, from there you click on the gray "ADD USER" button and follow the same steps outlined above.

Editing and Deleting Existing Users

Editing existing users can either be done from the main Site administration page or the page of users. From the Site administration page click on the yellow pencil icon and on the next page, just change the information you want to change and click save. From the Site administration page click on the blue Users text which brings up a list of users, from there you click on the blue text of the username you want to edit and follow the same steps outlined above.

Deleting existing users can either be done from the main Site administration page or the page of users. From the Site administration page click on the yellow pencil icon and on the next page, click on the red Delete button on the bottom left side of the screen, you will be redirected to another page that gives you the opportunity to change your mind by asking if you are sure and giving you a summary of everything that will be deleted, click the red Yes I'm sure button to confirm deletion of the user, or the gray No, take me back button to cancel deletion. From the Site administration page click on the blue Users text which brings up a list of users, from there you click on the blue text of the username you want to edit and follow the same steps outlined above. You can delete multiple users at the same time by clicking on the checkbox next to the usernames and Then, select "Delete selected *users*" from the "Action" drop down at the to left of the page and press "Go".

FAQ

- The map is not rendering on the results page.
    - This is likely because there are no organizations that meet the search criteria you entered with a physical address. If this is not the case, try clearing the cache of your web browser.
- How do I return to the Voluntunity website after clicking on an organization link of the CONTACT US button?
    - All links open in a new tab. To return to Voluntunity simply close the current tab or click on the Voluntunity tab if you wish to keep the current tab open.

Further Help

For further questions or comments on the operation or further development of the Voluntunity website, please contact Dr. Anthony at anthonyb@southwestern.edu. Further contact information for Dr. Anthony can be found here.

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