

United Way Dashboard User Documents



United Way Program and Agency Database

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Uploading Data

1. From the home page, navigate to the upload by clicking the Upload button
2. Click Choose File and find the CSV file you wish to upload
3. Make sure Inventory and Outputs is selected as the file type (It should be selected by default)
4. Make sure the appropriate Funding year is selected
5. If you wish to clear all current data for the year you are uploading for, check the box that says "Check to overwrite data"
6. Click upload



United Way Program and Agency Database

Home Page

Upload file

Choose a file

Click here to
find CSV file

Specify the file type:

Inventory and Outputs

Make sure this is
selected

Funding year:

2015/2016

Choose the correct year

Check to overwrite data


Only check if you want
to erase existing data for this
funding year

Upload

Last user to upload was admin at March 29 2017 02:39:40 for Program
Locations without overwrite

Uploading Program Locations

1. Follow the exact same procedure except select Program Locations as the File Type



**United Way Program
and Agency Database**

[Home Page](#)

Upload file

[Choose a file](#)

Specify the file type:

The only difference is to
select Program Locations here

Check to overwrite data: ☐


[Upload](#)

Last user to upload was admin at March 29 2017 02:39:40 for Program
Locations without overwrite

Add User (Admin Only)

1. From the home page, navigate to the Add User page by clicking the Add User button in the top left corner
2. Enter the new user's username
3. Enter their password and confirm it

Add New User



Username

Password

Confirm Password


[Add User](#)

[Back to Homepage](#)

Delete User (Admin Only)

1. From the home page, navigate to the Delete User page by clicking the Delete User button in the top left corner
2. Select the user's username that you wish to delete
3. Click the Delete button
4. NOTE: You cannot delete admin users

Delete User



Username

Delete

[Back to Homepage](#)

Reset Password (Admin Only)

1. From the home page, navigate to the Reset Password page by clicking the Reset Password button in the top left corner
2. Select the user's username whose password you would like to reset.
3. Enter and re-enter a new password
4. Click Submit

Reset Password



Username

Password

Confirm Password

Submit

[Back to Homepage](#)

View Recent User Searches (Admin Only)

This feature allows admins to view the filters that were applied in the last 100 searches made by any user on the application.

1. From the home page, navigate to the page by clicking the View Recent Searches button in the top left corner

Search for Programs

1. From the home page navigate to the Search page by click Search in the center of the home page
2. Click on the filters you would like to select
3. ***SELECTING MULTIPLE OPTIONS ON THE SAME FILTER for MACS*** To select non-consecutive filters hold the COMMAND key while selecting. In order to select consecutive filters, click the first one, hold down shift and then click on the last one.
4. ***SELECTING MULTIPLE OPTIONS ON THE SAME FILTER for WINDOWS*** To select non-consecutive filters hold the CTRL key while selecting. In order to select consecutive filters, click the first one, hold down shift and then click on the last one.
5. ***DESELECTING OPTIONS*** On Mac hold the COMMAND key and then click on the selected option. On windows hold the CTRL key and then click on the selected option.
6. When all the appropriate filters have been selected click Submit



United Way Program and Agency Database

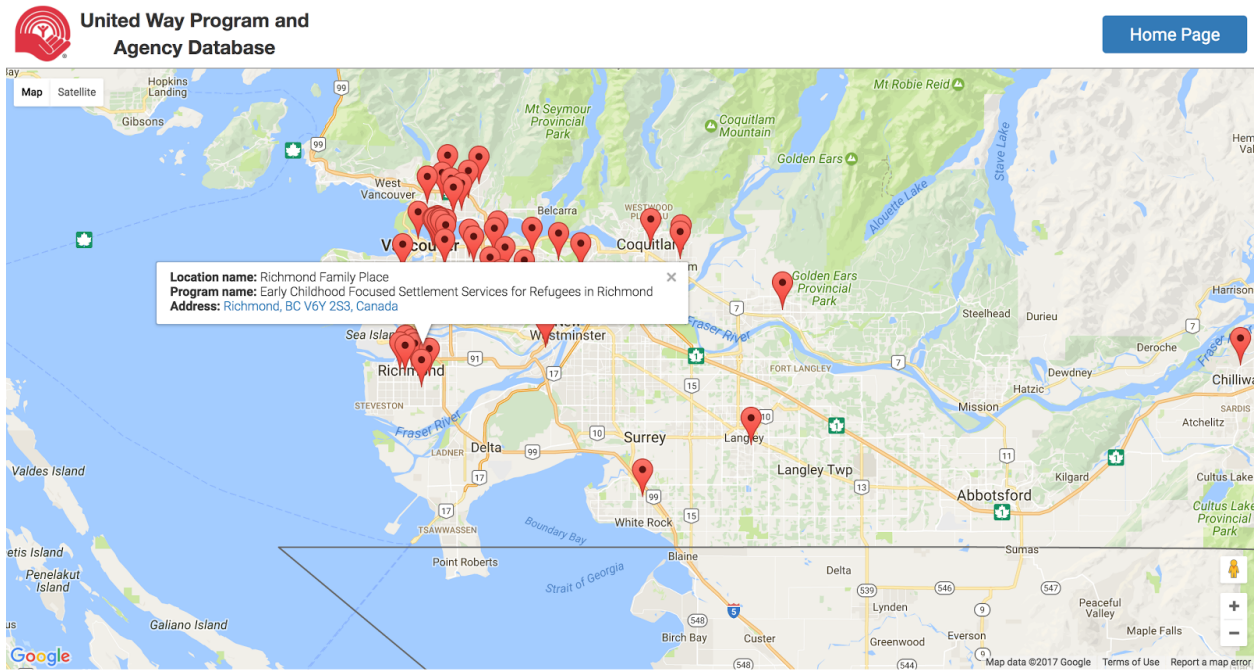
Home Page

Select filters to search

Funding Year	<div>2015/2016</div> <div>2016/2017</div> <div>2017/2018</div>	<p>Selecting consecutive options</p> <p>1. Click</p> <p>2. *HOLD SHIFT*</p> <p>3. Click</p>
Focus Area	<div>All that Kids Can Be</div> <div> -- Giving Young Children a Healthy Start -- Helping School-aged Children Succeed </div> <div>Poverty to Possibility</div> <div> -- Giving Skills to Feed Families </div>	<p>Selecting non-consecutive options (MAC)</p> <p>1. *HOLD COMMAND*</p> <p>2. Click</p> <p>3. *HOLD COMMAND*</p> <p>4. Click</p>
Target Population	<div>Early Childhood</div> <div>Middle Years</div> <div>Families</div> <div>Seniors</div> <div>Parents/Caregivers</div>	<p>Selecting non-consecutive options (Windows)</p> <p>1. *HOLD CTRL*</p> <p>2. Click</p> <p>3. *HOLD CTRL*</p> <p>4. Click</p>
Program Elements	<div>Learning Support</div> <div> -- Science/Technology/Engineering/Math/Numeracy -- Language/Literacy/Reading </div>	

View Program Locations on a Map

1. From the home page, navigate to the Map page by clicking the Map button in the center of the page
2. Click on icons to learn more about the program
3. Click on the address to open Google Maps in a new tab



View Single Program Location on a Map

1. Ensure that the location of the program has been uploaded
2. Follow the steps outlined above to perform a search and ensure that it will return the program you would like to know the location of
3. Scroll through the returned results until finding the program
4. Click on the marker in the map on the right hand side of the screen
5. In the resulting pop up box, click on the address as seen in the photo below
6. You will now be taken out of the application to Google Maps

Program Name	Agency Name	Dollars Invested	Funding Stream	Fund Start	Fund End	Program Element	Description	Program Locations	Links
Better at Home Langley	Langley Senior Resources Society	180000.0	Better at Home	2015-04-01	2016-03-31	Social and Emotional Health , Connections/Healthy Relationships, Address Program Barriers/Access	Better at Home funding mobilizes local resources, networks and volunteers to support seniors living in their homes and enabling them to remain at home longer.	1	
Better at Home Surrey South White Rock	Seniors Come Share Society	246668.0	Better at Home	2015-04-01	2016-03-31	Social and Emotional Health , Connections/Healthy Relationships	Better at Home funding mobilizes local resources, networks and volunteers to support seniors living in their homes and enabling them to remain at home longer.	1	

Map Satellite

Location name: Langley Senior Resources Society

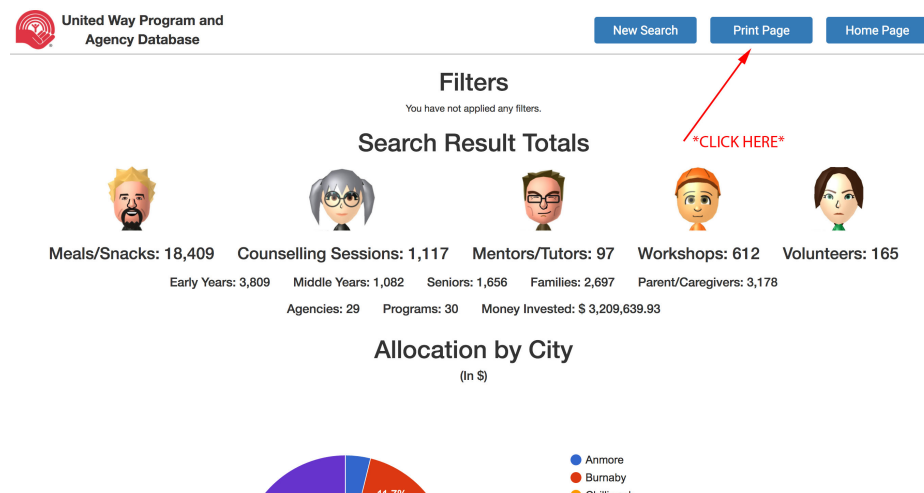
Program name: Better at Home Langley

Address: [Langley, BC V3A 9H1, Canada](#)

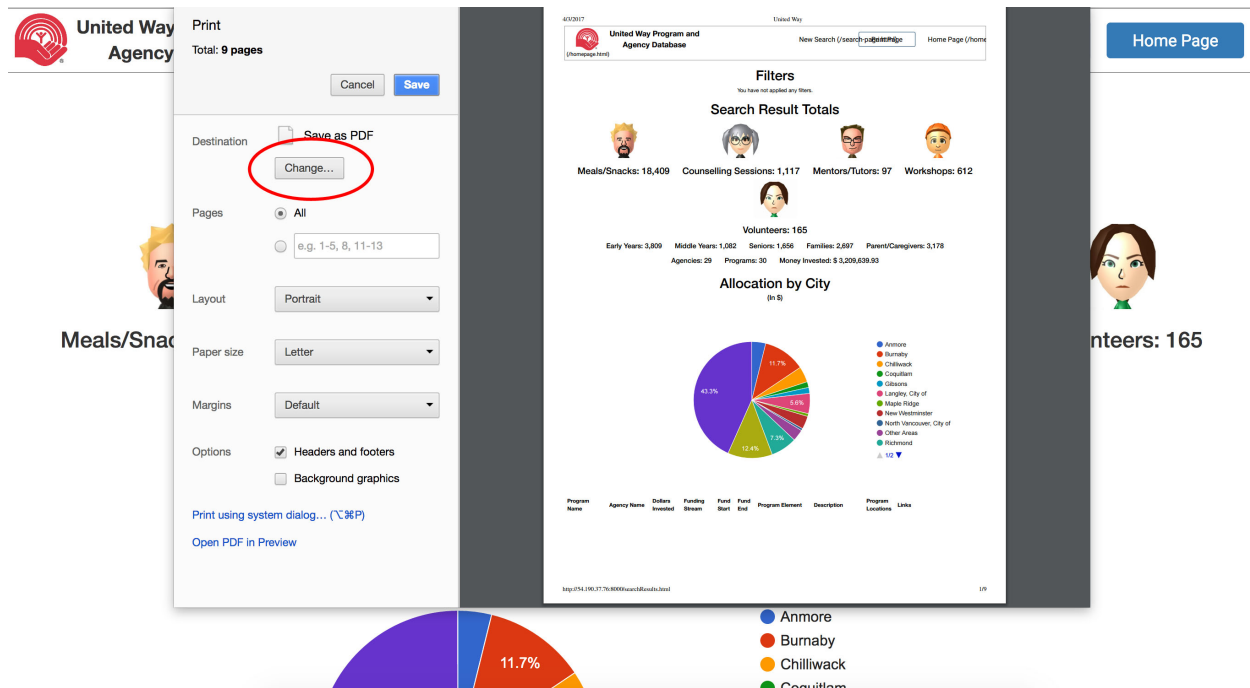
[https://maps.google.com/maps?q=\(49.0968934, -122.6497784\)](https://maps.google.com/maps?q=(49.0968934, -122.6497784))

Download Search Results PDF

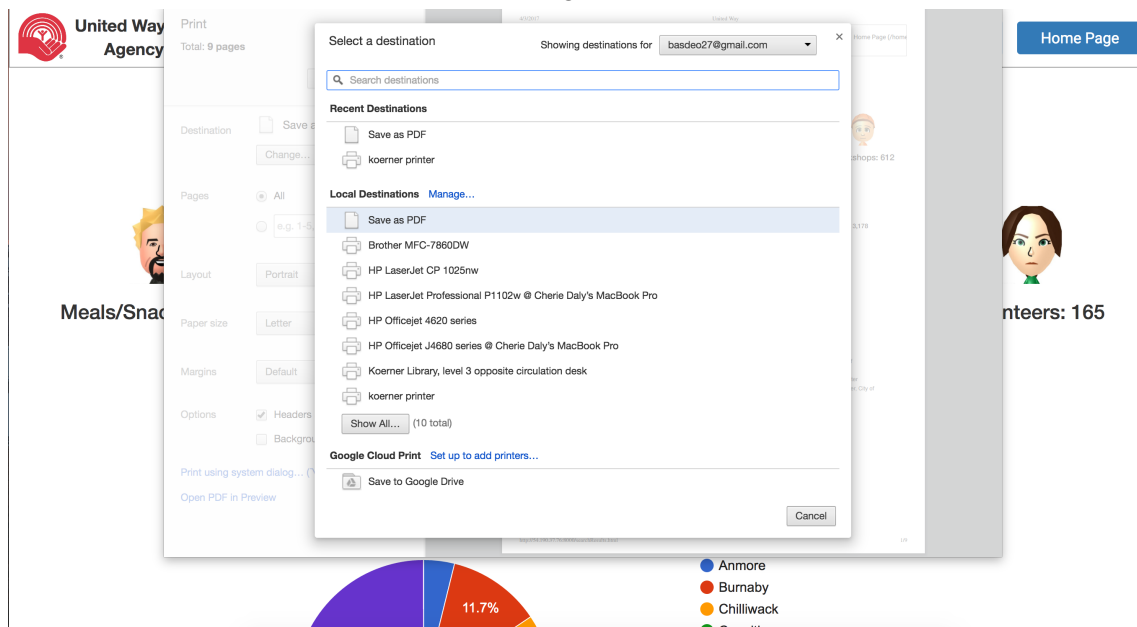
1. Follow the steps outlined above to perform a search
2. Click on Print Page at the top of the screen



3. In the resulting pop-up, below destination, click on “Change”



4. Select “Save as PDF” from the resulting pop up menu under local destinations



5. Finally click the blue “Save” button

