NYC Volunteer Management System User Manual

1. System Overview

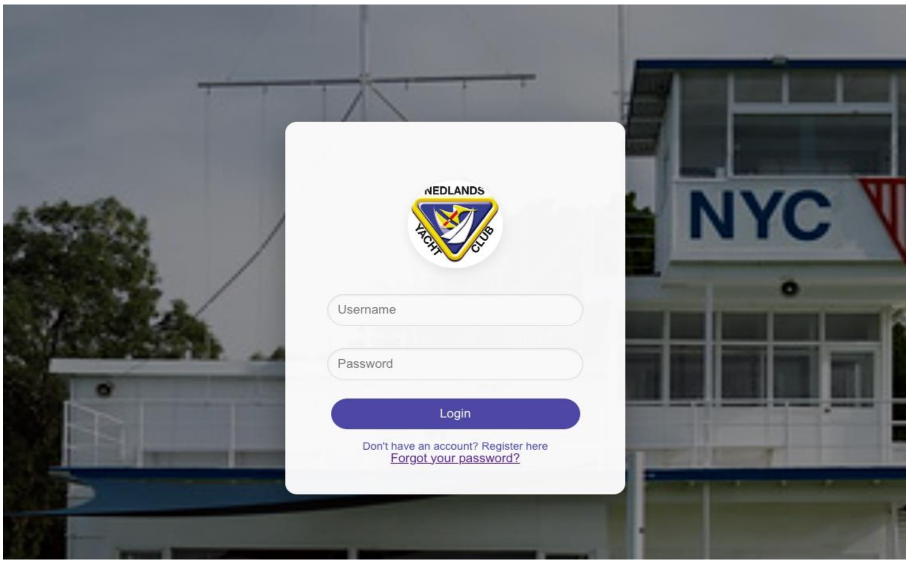
The NYC Volunteer Management System is designed for NYC club volunteer management and includes six function modules: Member Management, Team Member Management, Admin Management, Volunteer Points, Events, and Reports. This manual will provide detailed guidance on how to use each section.

2. Logging into the System

2.1 Open your web browser and go to the system's URL: http://localhost:3000/.

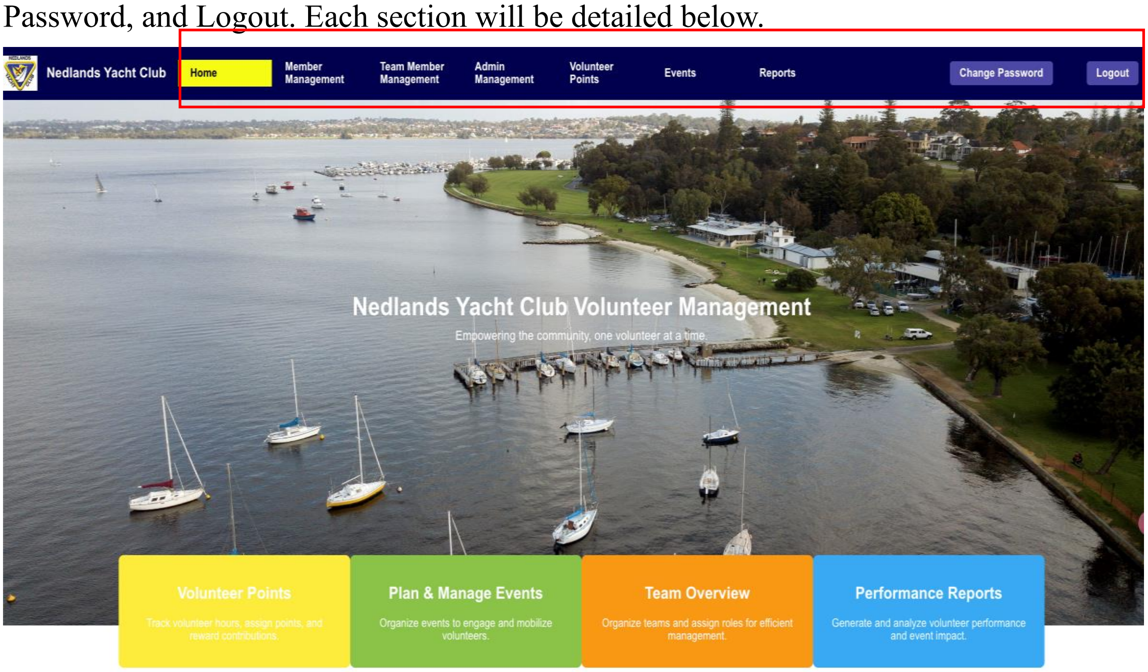
2.2 On the login page, enter your username and password.

2.3 Click the "**Login**" button to enter the main interface of the system.



3. Main Interface

The main interface of the system includes 9 sections: Home, Member Management, Team Member Management, Admin Management, Volunteer Points, Events, Reports, Change Password, and Logout. Each section will be detailed below.

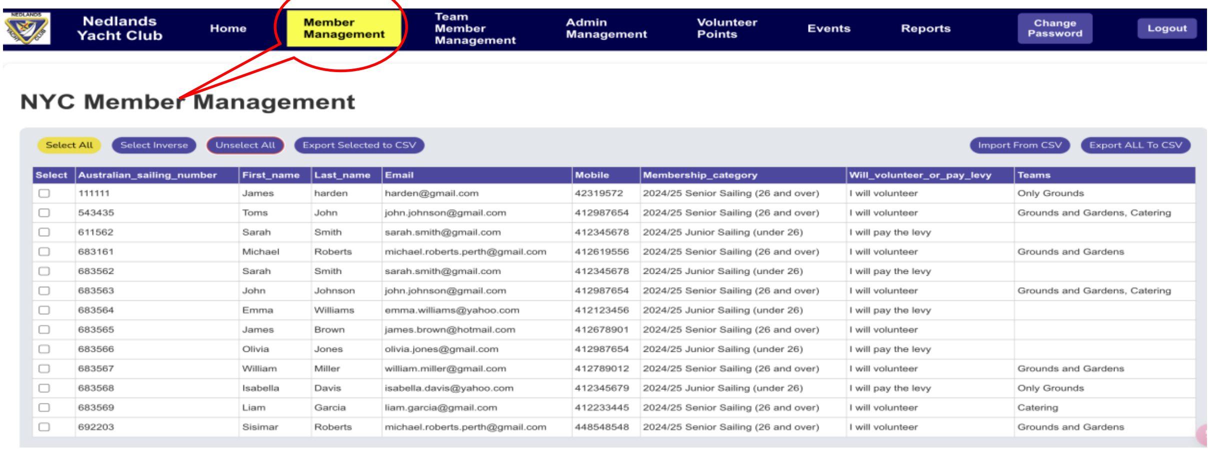


3.1. Member Management

The Member Management page primarily facilitates the import and export of member information via specific CSV files and allows for viewing member details.

3.1.1 Viewing the Member List:

- Click on “**Member Management”** to view a detailed list of all members, including their ID, name, email, phone number, member category, volunteer status, and team affiliation.



Select	Australian_sailing_number	First_name	Last_name	Email	Mobile	Membership_category	Will_volunteer_or_pay_levy	Teams
☐	111111	James	harden	harden@gmail.com	42319572	2024/25 Senior Sailing (26 and over)	I will volunteer	Only Grounds
☐	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens, Catering
☐	611562	Sarah	Smith	sarah.smith@gmail.com	412345678	2024/25 Junior Sailing (under 26)	I will pay the levy	
☐	683161	Michael	Roberts	michael.roberts.perth@gmail.com	412619556	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens
☐	683562	Sarah	Smith	sarah.smith@gmail.com	412345678	2024/25 Junior Sailing (under 26)	I will pay the levy	
☐	683563	John	Johnson	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens, Catering
☐	683564	Emma	Williams	emma.williams@yahoo.com	412123456	2024/25 Junior Sailing (under 26)	I will pay the levy	
☐	683565	James	Brown	james.brown@hotmail.com	412678901	2024/25 Senior Sailing (26 and over)	I will volunteer	
☐	683566	Olivia	Jones	olivia.jones@gmail.com	412987654	2024/25 Junior Sailing (under 26)	I will pay the levy	
☐	683567	William	Miller	william.miller@gmail.com	412789012	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens
☐	683568	Isabella	Davis	isabella.davis@yahoo.com	412345679	2024/25 Junior Sailing (under 26)	I will pay the levy	Only Grounds
☐	683569	Liam	Garcia	liam.garcia@gmail.com	412233445	2024/25 Senior Sailing (26 and over)	I will volunteer	Catering
☐	692203	Sisimar	Roberts	michael.roberts.perth@gmail.com	448548548	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens

3.1.2 Selection and Operations:

3.1.2.1 Select All: Click “Select All” to select all members on the current page.

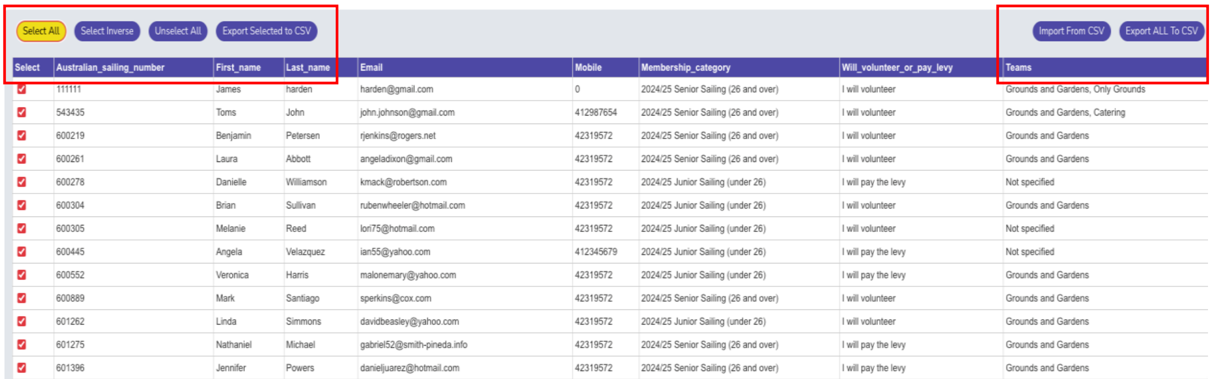
3.1.2.2 Select Inverse: Click “Select Inverse” to reverse the current selection.

3.1.2.3 Unselect All: Click “Unselect All” to deselect all members on the current page.

3.1.2.4 Export Data: Click “Export Selected to CSV” to export the selected member information to a CSV file.

3.1.2.5 Import Member Data: Click “Import from CSV” to import member data from a CSV file into the system.

3.1.2.6 All Data: Click “Export All to CSV” to export all member to a CSV file.



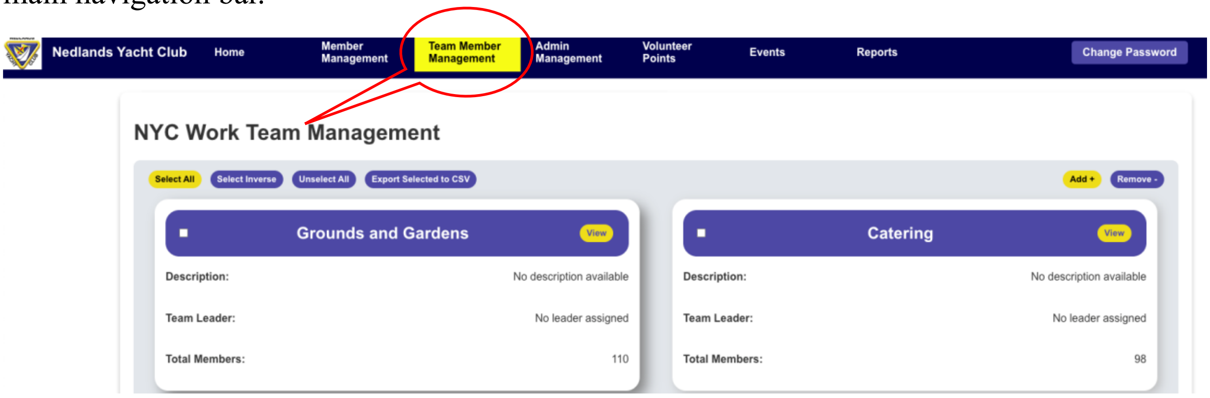
Select	Australian_sailing_number	First_name	Last_name	Email	Mobile	Membership_category	Will_volunteer_or_pay_levy	Teams
☑	111111	James	harden	harden@gmail.com	0	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens, Only Grounds
☑	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens, Catering
☑	600219	Benjamin	Petersen	rjenkins@rogers.net	42319572	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens
☑	600261	Laura	Abbott	angeladixon@gmail.com	42319572	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens
☑	600278	Danielle	Williamson	kmack@robertson.com	42319572	2024/25 Junior Sailing (under 26)	I will pay the levy	Not specified
☑	600304	Brian	Sullivan	rubenwheeler@hotmail.com	42319572	2024/25 Junior Sailing (under 26)	I will volunteer	Grounds and Gardens
☑	600305	Melanie	Reed	lori75@hotmail.com	42319572	2024/25 Junior Sailing (under 26)	I will volunteer	Not specified
☑	600445	Angela	Velazquez	ian55@yahoo.com	412345679	2024/25 Junior Sailing (under 26)	I will pay the levy	Not specified
☑	600552	Veronica	Harris	malonemary@yahoo.com	42319572	2024/25 Junior Sailing (under 26)	I will pay the levy	Grounds and Gardens
☑	600889	Mark	Santiago	sperkins@cox.com	42319572	2024/25 Senior Sailing (26 and over)	I will volunteer	Grounds and Gardens
☑	601262	Linda	Simmons	davidbeasley@yahoo.com	42319572	2024/25 Junior Sailing (under 26)	I will volunteer	Grounds and Gardens
☑	601275	Nathaniel	Michael	gabriel52@smith-pineda.info	42319572	2024/25 Senior Sailing (26 and over)	I will pay the levy	Grounds and Gardens
☑	601396	Jennifer	Powers	danieljuarez@hotmail.com	42319572	2024/25 Senior Sailing (26 and over)	I will pay the levy	Grounds and Gardens

3.2 Team Member Management

Team Member Management is a feature designed for managing teams. Through this interface, admin users and team leaders can view detailed information about each team, edit team information, and add or remove team members.

3.2.1 Entering the Team Member Management Page

To access the team management page, click on "Team Member Management" in the system's main navigation bar.

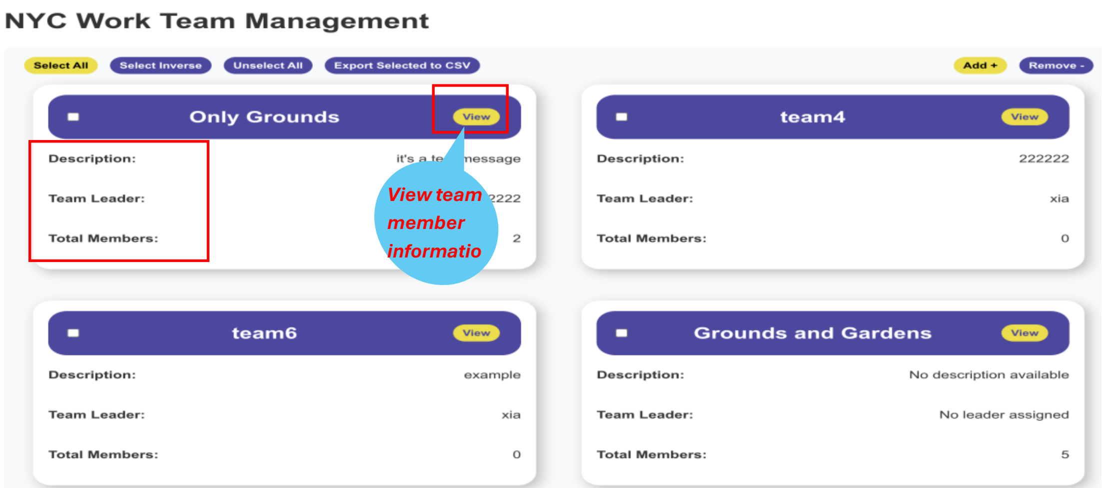


3.2.2 Viewing the Team List

Upon loading the page, you will see a list of all teams.

Each team card displays the team name, description, team leader, and the total number of team members.

To view more detailed information about a team, click the "View" button on the card.



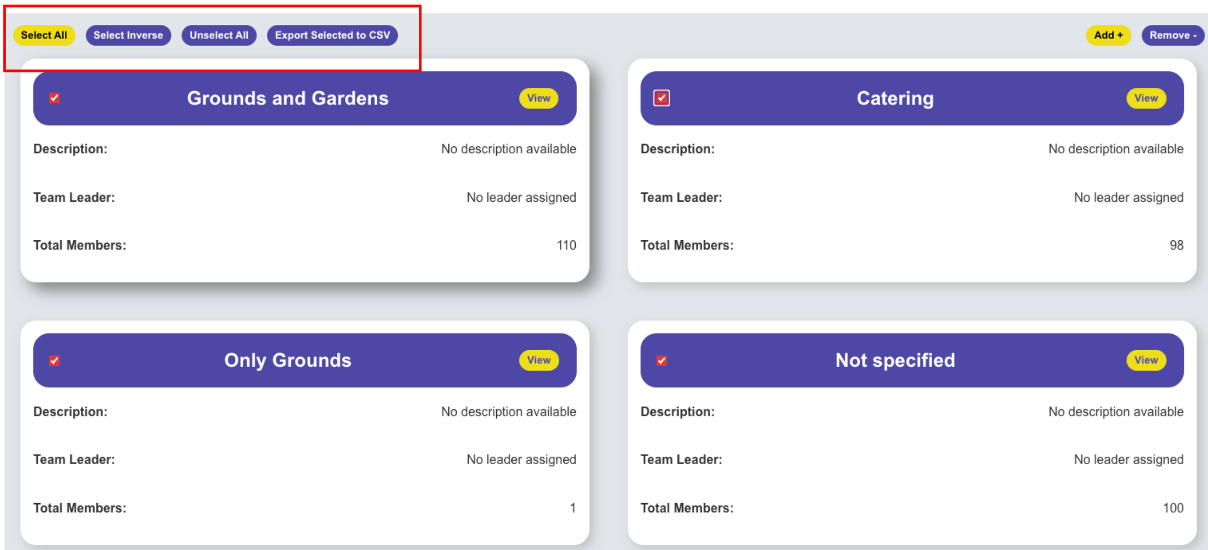
3.2.3 Selecting Options

3.2.3.1 Select All: Click "Select All" to select all teams displayed on the page.

3.2.3.2 Select Inverse: Click "Select Inverse" to reverse the current selection.

3.2.3.3Unselect All: Click "Unselect All" to cancel all current selections.

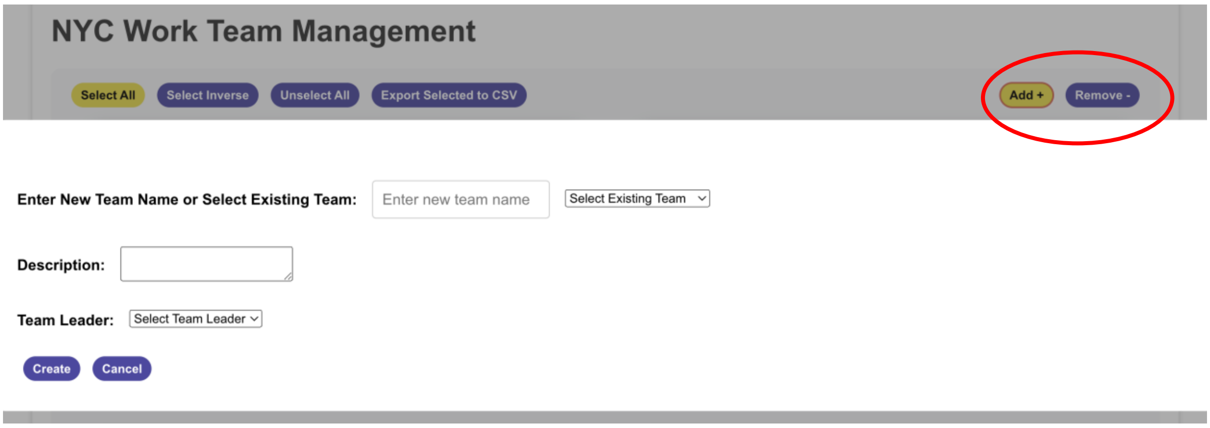
3.2.3.4 Export Data: To export information about the selected teams, click "Export Selected to CSV".



3.2.4 Adding and Removing Teams

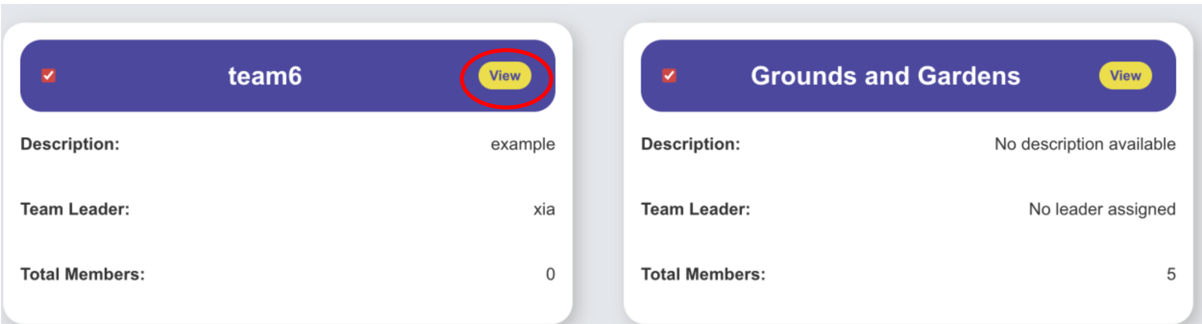
3.2.4.1 Create a New Team: Click "Add+" to create a new team.

3.2.4.2 Remove a Team: Select a team, then click "Remove-" to delete the selected team.



3.2.5 Team Details

Clicking the "View" button next to a team name will open a new window displaying detailed information about that team.

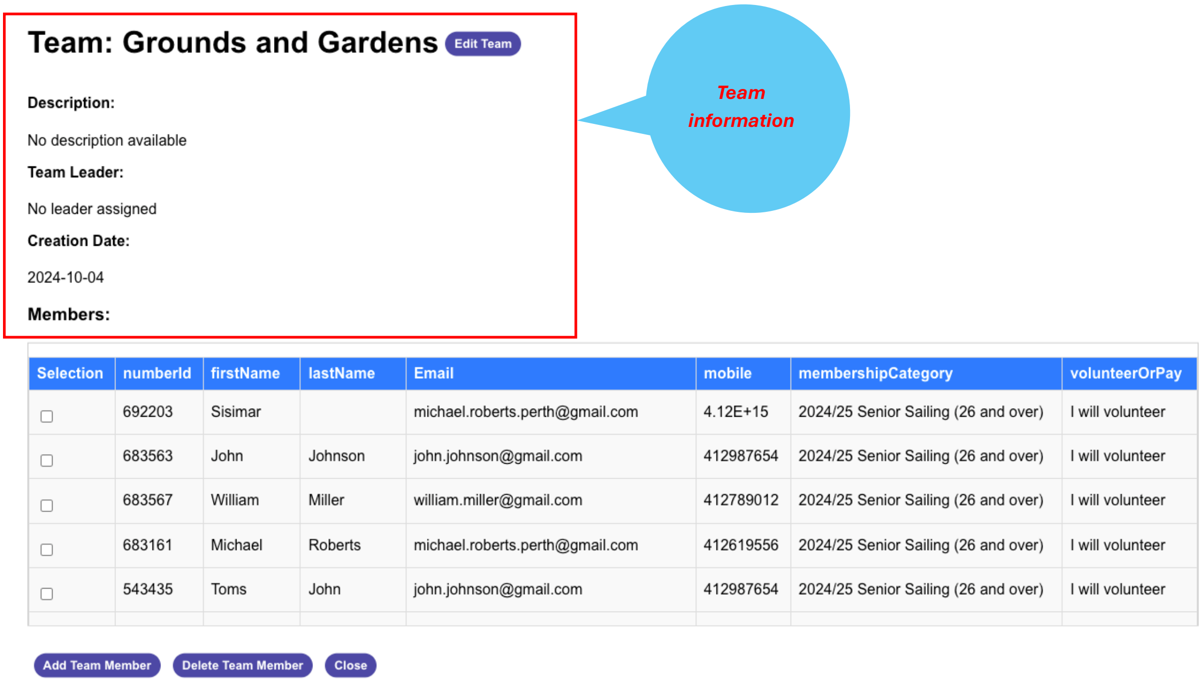


3.2.6 Window Layout

3.2.6 .1 Team Description: Displays a specific description of the team.

3.2.6 .2 Team Leader: Shows the currently assigned team leader.

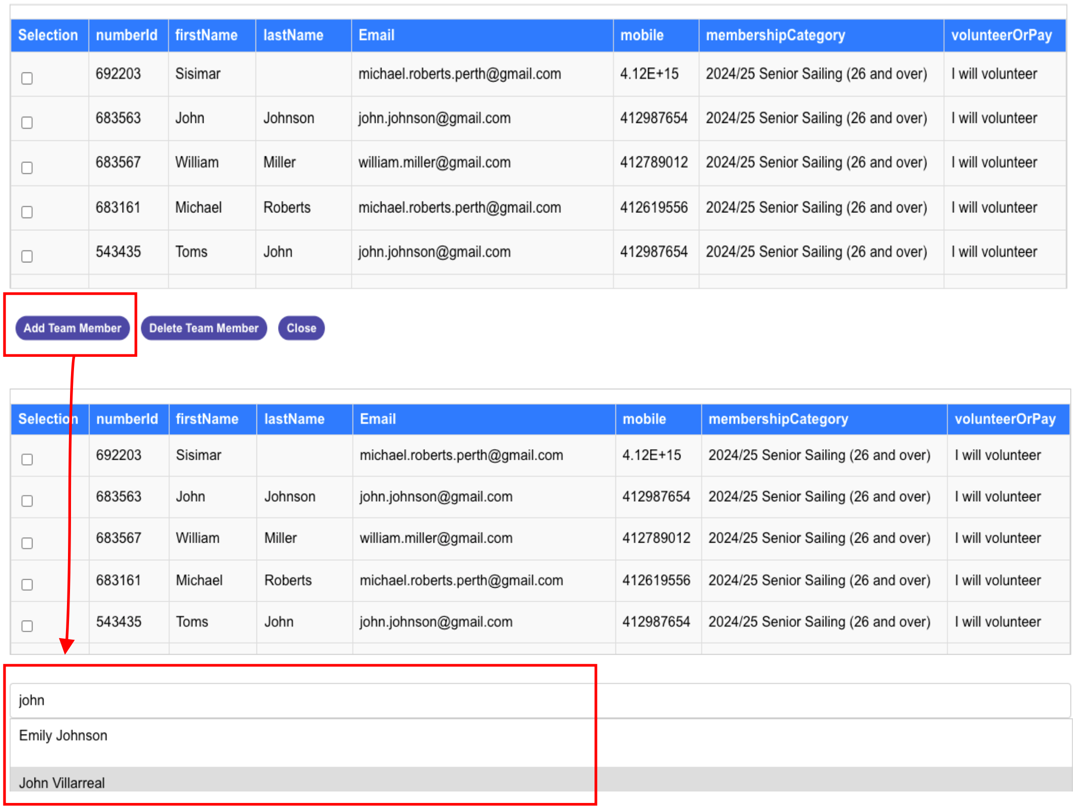
3.2.6 .3 Team Members: Lists detailed information about all team members, including Member ID, name, email, phone number, membership type etc.



Selection	numberId	firstName	lastName	Email	mobile	membershipCategory	volunteerOrPay
☐	692203	Sisimar		michael.roberts.perth@gmail.com	4.12E+15	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683563	John	Johnson	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683567	William	Miller	william.miller@gmail.com	412789012	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683161	Michael	Roberts	michael.roberts.perth@gmail.com	412619556	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer

3.2.7 Managing Team Members

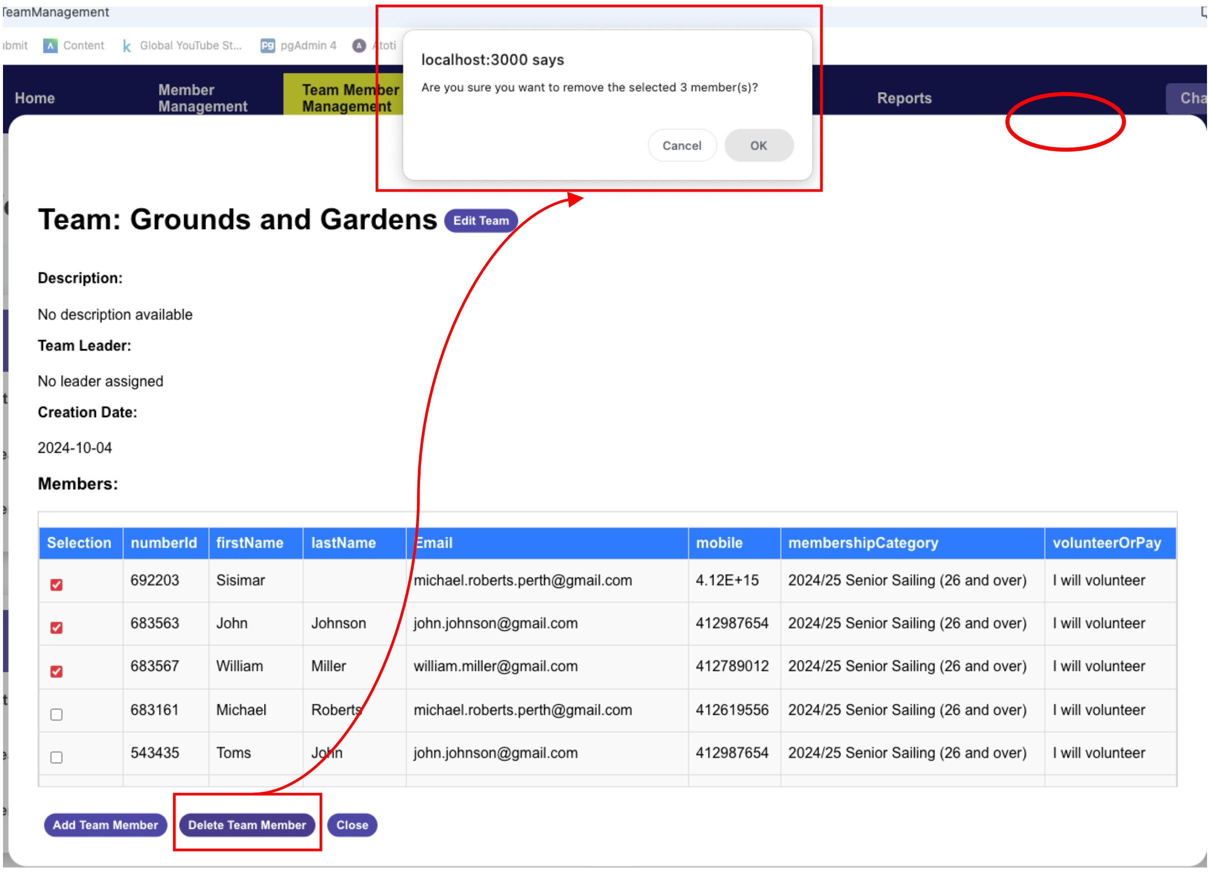
3.2.7.1 Add Member: Click the "Add Team Member" button to add members by entering their names; the input is case-insensitive.



Selection	numberId	firstName	lastName	Email	mobile	membershipCategory	volunteerOrPay
☐	692203	Sisimar		michael.roberts.perth@gmail.com	4.12E+15	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683563	John	Johnson	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683567	William	Miller	william.miller@gmail.com	412789012	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683161	Michael	Roberts	michael.roberts.perth@gmail.com	412619556	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer

Selection	numberId	firstName	lastName	Email	mobile	membershipCategory	volunteerOrPay
☐	692203	Sisimar		michael.roberts.perth@gmail.com	4.12E+15	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683563	John	Johnson	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683567	William	Miller	william.miller@gmail.com	412789012	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683161	Michael	Roberts	michael.roberts.perth@gmail.com	412619556	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer

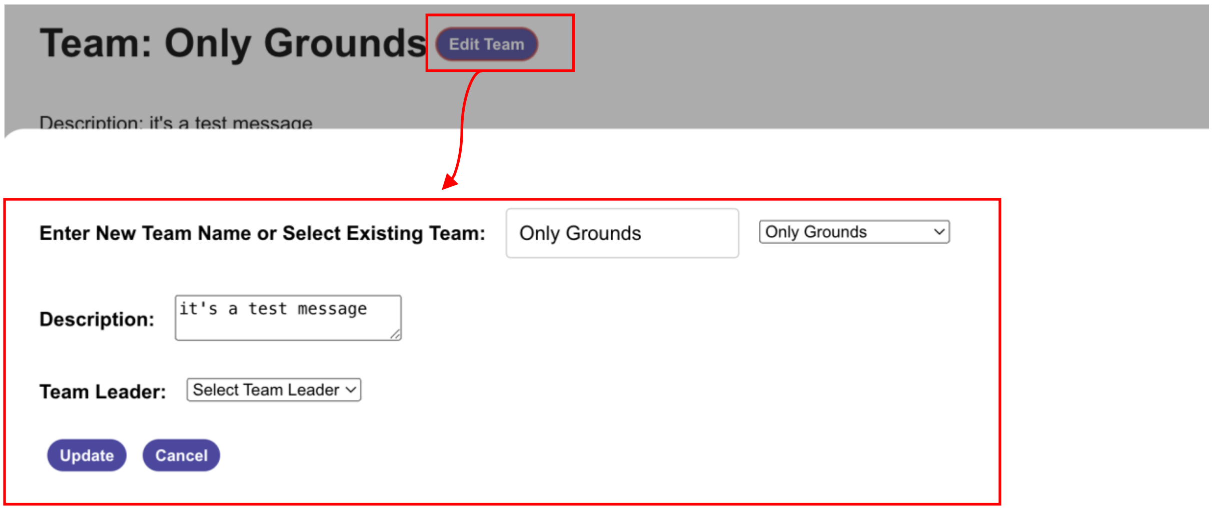
3.2.7.2 Delete Members: After selecting one or more team members, click "Delete Team Member" to remove them.



3.2.8 Editing Team Information

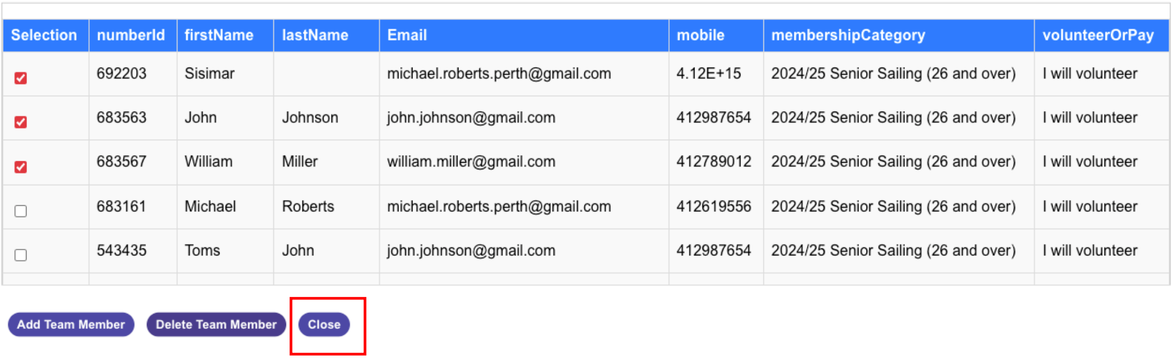
In the team details window, click the "Edit Team" button to edit the team.

After modifying the team's description or leader information, click save to update the data.



3.2.9 Closing the Team Details Window

After completing the review or modification of team information, click the "Close" button at the bottom of the window to return to the team list.



Selection	numberId	firstName	lastName	Email	mobile	membershipCategory	volunteerOrPay
☑	692203	Sisimar		michael.roberts.perth@gmail.com	4.12E+15	2024/25 Senior Sailing (26 and over)	I will volunteer
☑	683563	John	Johnson	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer
☑	683567	William	Miller	william.miller@gmail.com	412789012	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	683161	Michael	Roberts	michael.roberts.perth@gmail.com	412619556	2024/25 Senior Sailing (26 and over)	I will volunteer
☐	543435	Toms	John	john.johnson@gmail.com	412987654	2024/25 Senior Sailing (26 and over)	I will volunteer

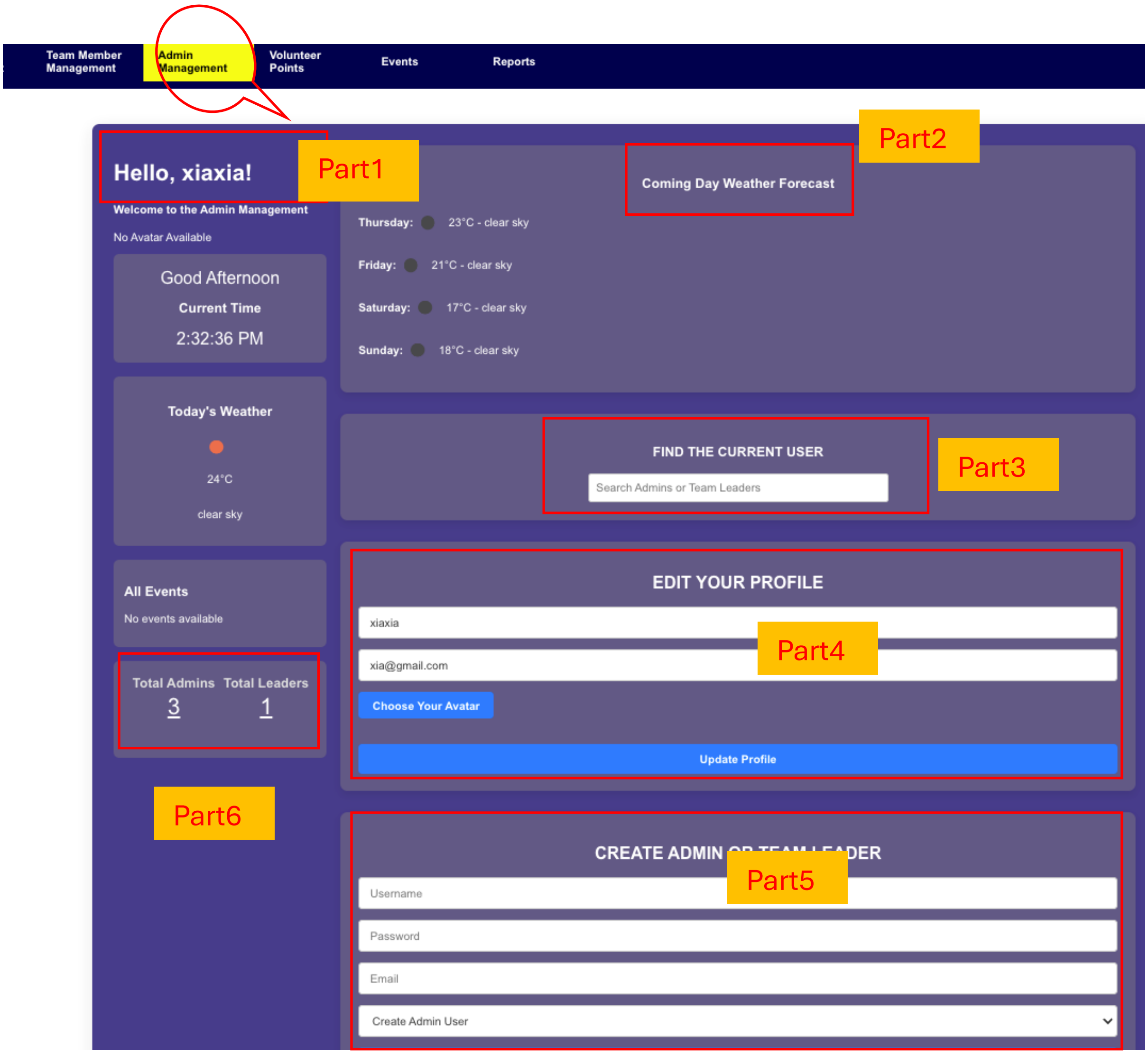
3.3 Admin Management

Admin Management is a feature specifically designed for administrative users, used to manage administrator and team leader accounts. This interface allows admin users to edit their profiles and create new admin or team leader accounts.

3.3.1 Accessing the Admin Management Page

Only users with administrative privileges can access this page. After logging into the system, click on "Admin Management" in the main navigation bar to enter the admin management interface. The Admin Management interface is divided into several key sections:

1) **Current User Information:** Displays the admin's username, current time information.
2) **Weather and Events Information:** Shows the current weather and a section for upcoming events.
3) **Search Functionality**: Provides a search bar to find current users by name, and to delete the user.
4) **Profile Editing:** Allows the admin to edit their profile details such as username, email.
5) **Account Creation:** Enables the creation of new admin or team leader accounts.
6) **Admin and Team Leader List:** This section provides a quick overview of all administrators and team leaders. It allows admin users to quickly see who else has administrative privileges.



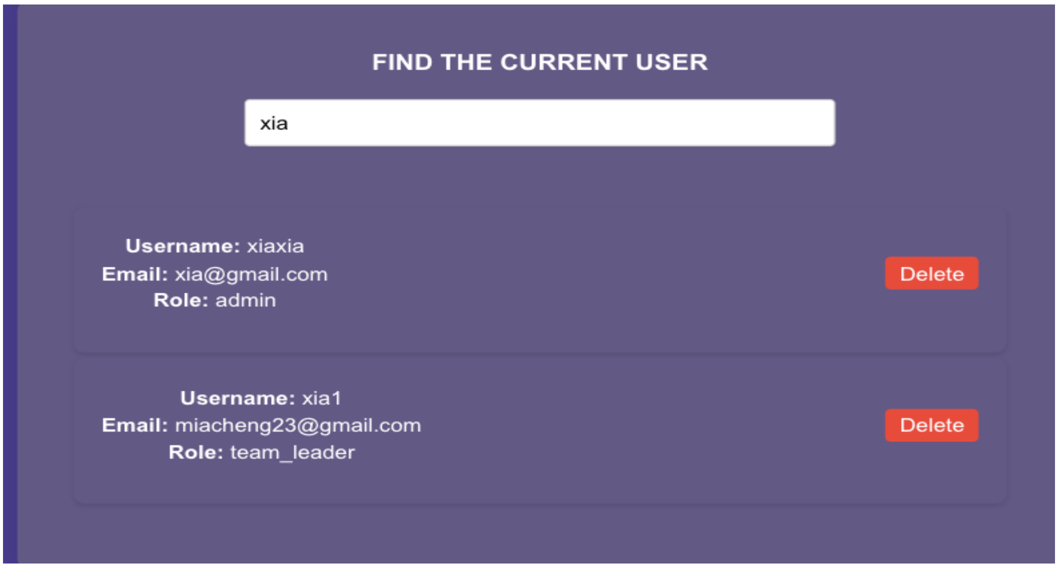
3.3.2 Managing Existing Users

This area of the Admin Management interface allows for searching, viewing, and deleting existing admin and team leader accounts.

a) Search for a user: Enter the username or part of the username in the "Find the Current User" search bar and submit the query. This will retrieve and display the user's details.

b) Review user details: Once a user is found, their details such as username, email, and role will be displayed under the search bar.

c) Delete a user: If you need to remove an admin or team leader from the system, you can do so by clicking the "Delete" button next to their details. Confirm the deletion in the prompted confirmation dialog to permanently remove the user's account.



3.3.3 Editing Personal Profile

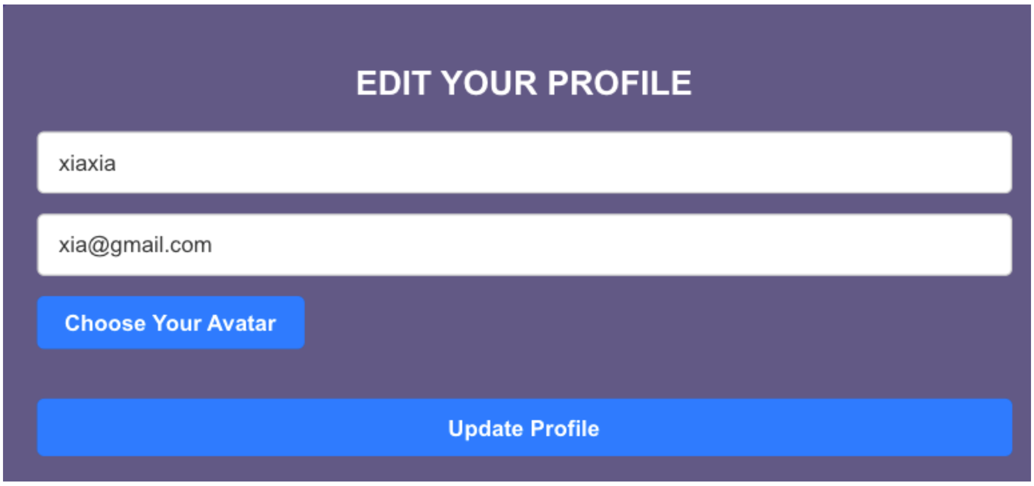
In the "Edit Your Personal Profile" area, you can update your username, email address, and upload a new avatar.

d) Enter your new username in the "Username" field (if you wish to change it).

e) Update your email address in the "Email" field.

f) Click "Choose file" to upload a new avatar image(optional).

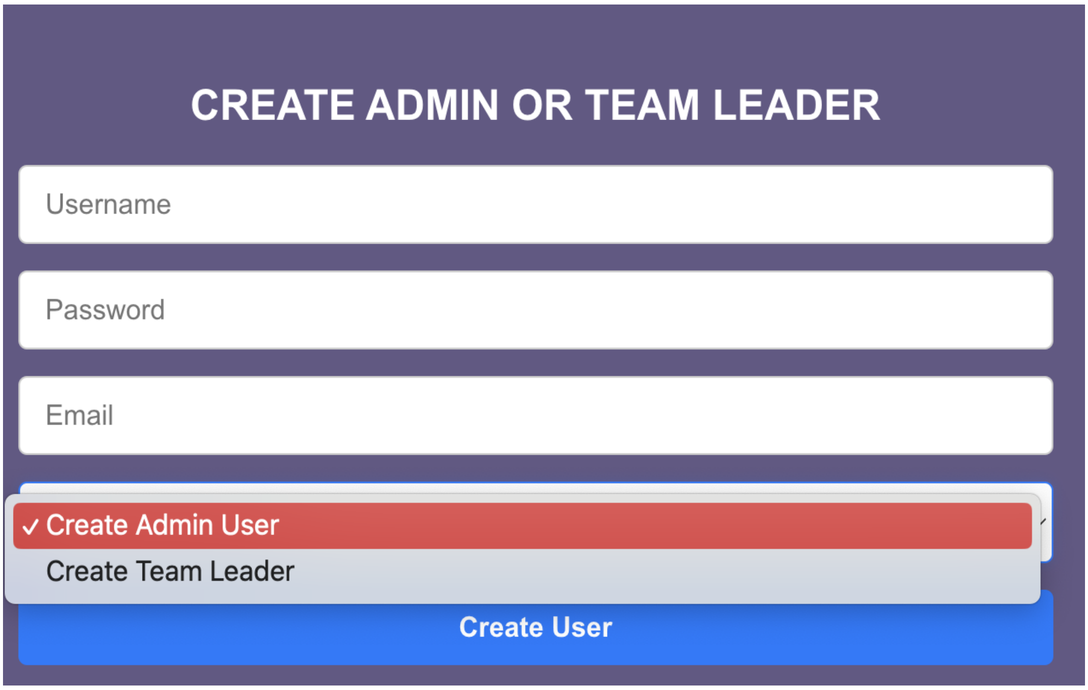
g) After completing the updates, click "Update Profile" to save the changes.



3.3.4 Creating an Admin or Team Leader

This area allows you to create new admin accounts or team leader accounts.

a) Enter the new admin's username in the "Username" field.
b) Set the new admin's password in the "Password" field.
c) Enter the new admin's email address in the "Email" field.
d) Click "Create Admin User / Create Team Leader" to create the new account.



3.3.5 Viewing the Admin and Team Leader List

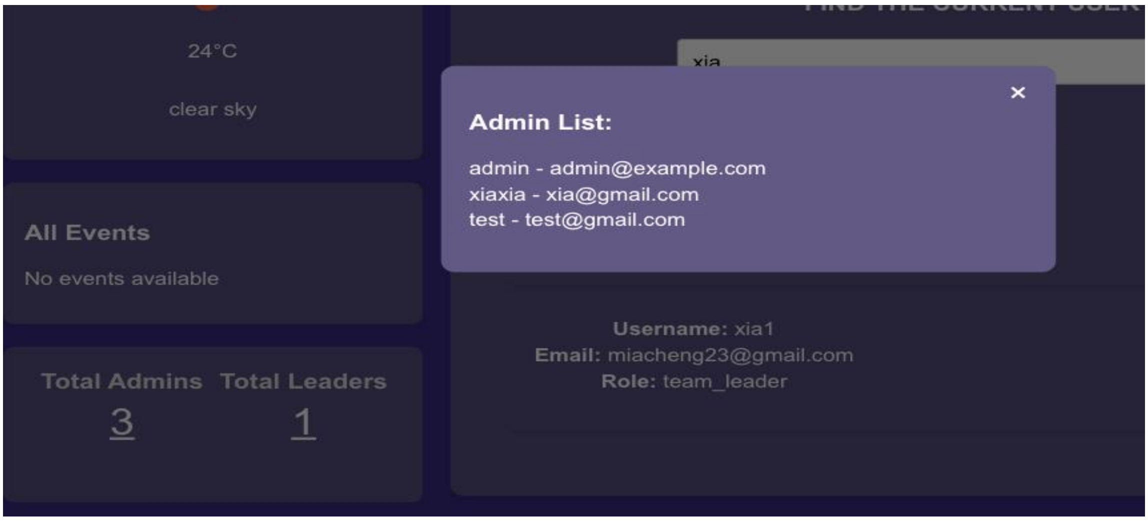
This section provides a quick overview of all administrators and team leaders. It allows admin users to quickly see who else has administrative privileges.

Total Admins and Team Leaders: The interface prominently displays the count of total admins and team leaders at the bottom of the sidebar, giving a quick numeric overview of the leadership structure.

Admin List Popup: Clicking on the count of total admins or team leaders will trigger a popup that lists the usernames and associated email addresses of all admins and team leaders.

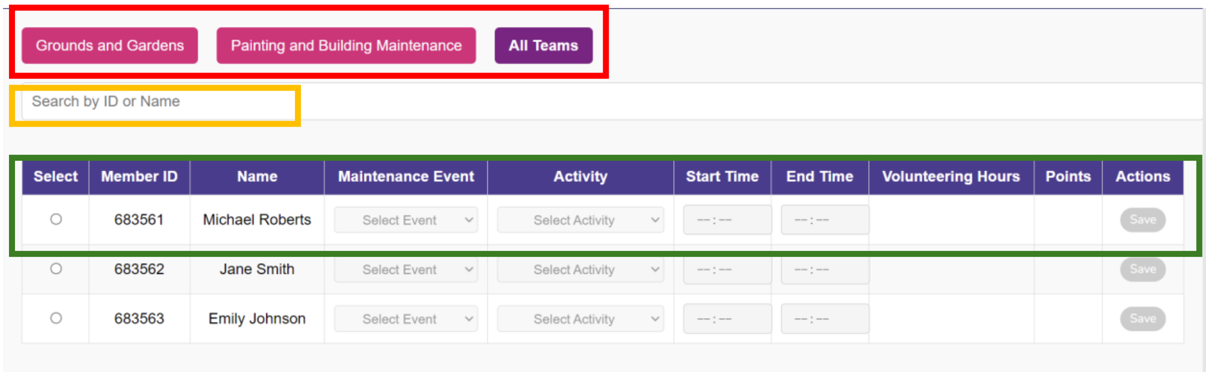
a) Access the List: Navigate to the lower section of the sidebar where the totals of admins and team leaders are displayed.

b) View Detailed List: Click on either "Total Admins" or "Total Leaders" to open a popup window that lists all the users in the selected category along with their email addresses.



3.4 Volunteer Points

This page allows team leaders or administrators to manage and track volunteer activities across different teams and events. The interface is divided into sections for maintenance events and activities, with the option to record volunteer start and end times, as well as points and volunteering hours.



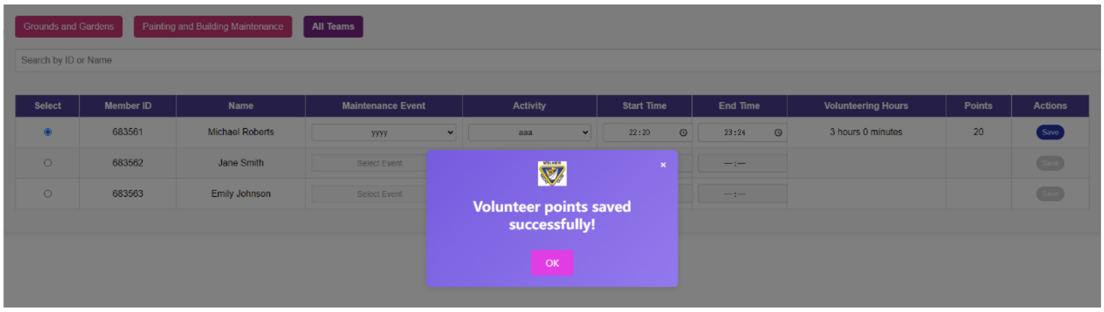
3.4.1 Adding Volunteer Points

Tabs for Teams: Grounds and Gardens: Select this tab to manage volunteers for garden-related activities. **Painting and Building Maintenance**: Use this tab to track volunteers involved in building-related work. **All Teams**: This tab consolidates all available volunteer groups across teams.

Search Bar: You can search for a volunteer by entering their **ID or Name**. This helps quickly locate specific members when the list is long.

Add Volunteer Table:

- **Selecting a Volunteer:** Click the **radio button** next to the volunteer's name to select them.
- **Assigning an Event and Activity:** Use the dropdown menus under **Maintenance Event** and **Activity** to select the relevant options. Only events from the **last three months** will be available.
- **Recording Volunteer Time:** Enter the **Start Time** and **End Time** using the appropriate fields. Once both times are entered, the **Volunteering Hours** will be automatically calculated.
- **Assigning Points (Optional):** You can input any **points** awarded to the volunteer in the respective column.
- **Saving the Data:** After filling in the required fields, click the **Save** button in the Actions column to record the entry. If the record is successfully added, the following windows will prompt.



Rules for Editing Points:

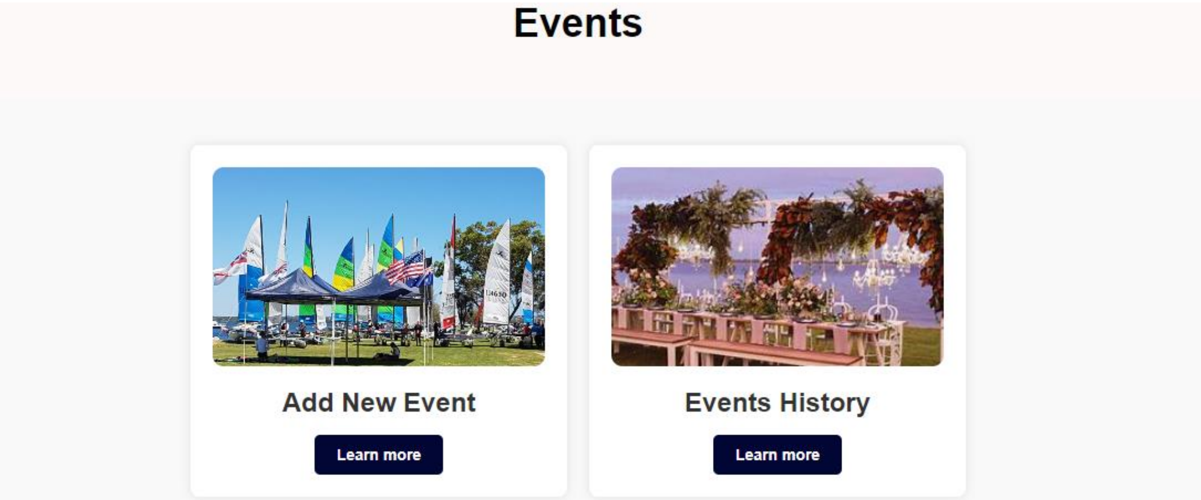
- Points Calculation Rule: 3 Hours = 20 Points
- Points must match the calculation rule, or the system will automatically recalculate the points based on the number of hours entered.

When Editing Points or Hours: If a user edits hours or points, the system checks:

- If points align with the hours.
- If points don't align, the system will automatically recalculate the points using the rule.

3.5 Events

This page allows team leaders or administrators to create and manage Event. The interface is divided into two sections: Add A New Event and Events History.

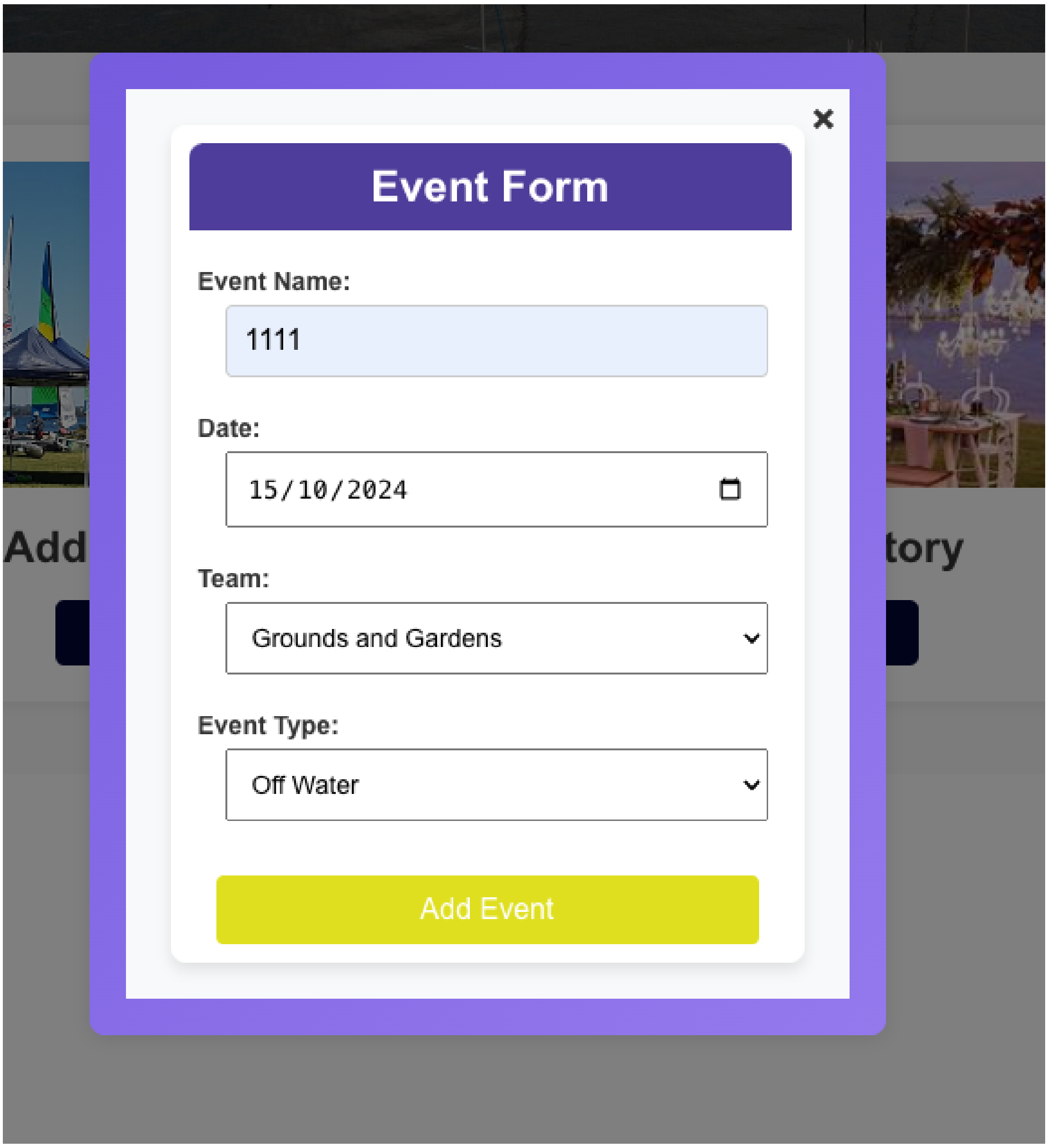


3.5.1. Adding a New Event

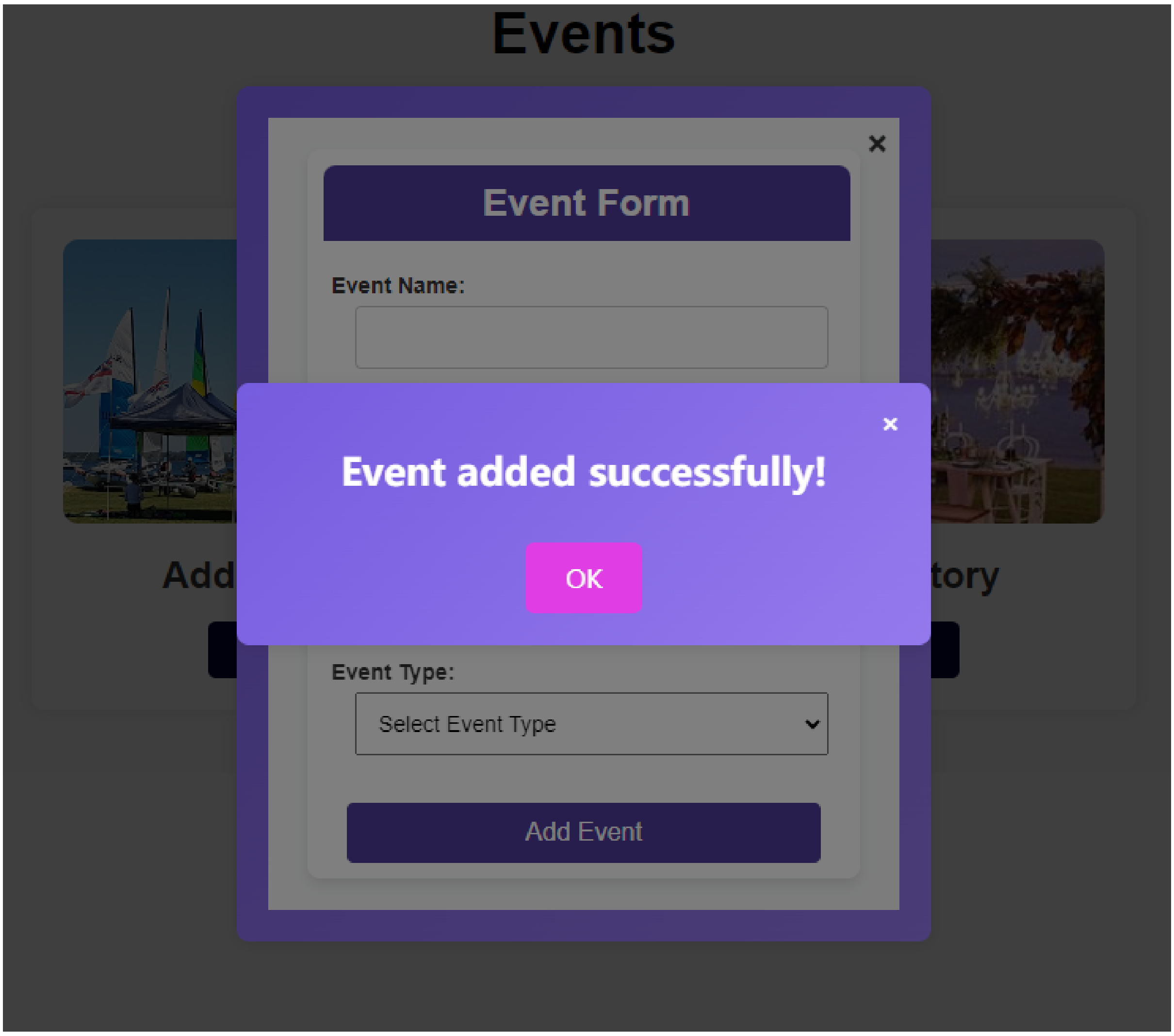
1. **Accessing the Event Form:**
   - Click on the **"Add New Event"** button under the "Events" section
   - A form (modal) will pop up, allowing you to enter event details.

2. **Filling Out the Event Form:**
   - **Event Name:** Enter a meaningful name for the event.
   - **Date:** Use the calendar picker to select the event date.
   - **Team:** Choose a team from the dropdown (e.g., Grounds and Gardens, Painting and Building Maintenance).
   - **Event Type:**
     - Select **"On Water"** or **"Off Water"**.

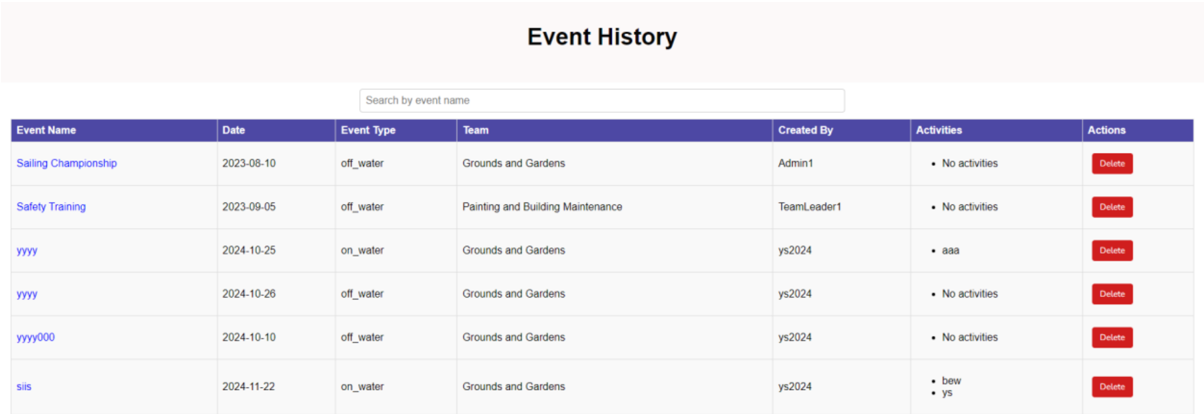
        - If **"On Water"** is selected, the form will allow you to add multiple activities.
            - Click **"Add Another Activity"** to list more activities.
            - Click the **"x"** button to delete an activity if needed.
    - **Adding the Event:** Once all fields are filled, click **"Add Event"**.



3. **Successful Event Creation:**
    - If the event is added successfully, a confirmation prompt will notify you of the successful action.



3.5.2. Viewing and Managing Event History



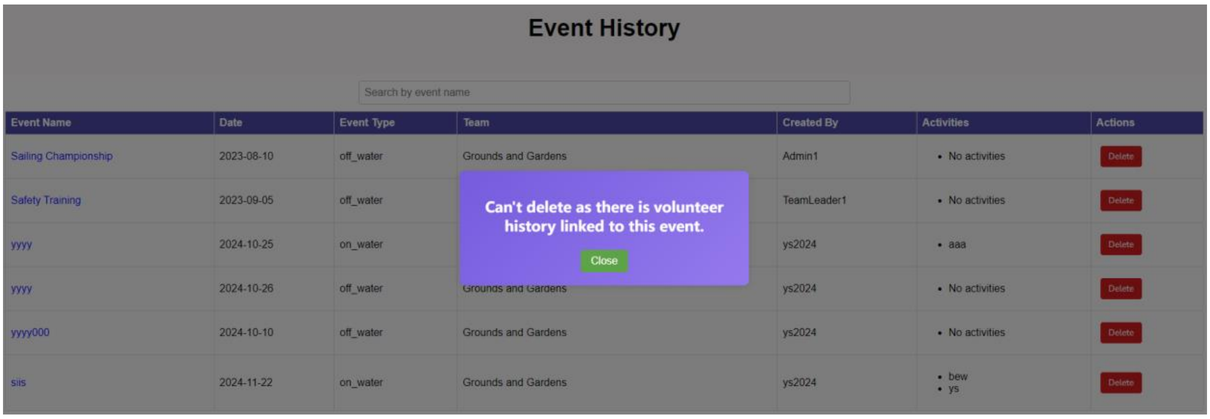
Event History

Search by event name

Event Name	Date	Event Type	Team	Created By	Activities	Actions
Sailing Championship	2023-08-10	off_water	Grounds and Gardens	Admin1	• No activities	Delete
Safety Training	2023-09-05	off_water	Painting and Building Maintenance	TeamLeader1	• No activities	Delete
yyyy	2024-10-25	on_water	Grounds and Gardens	ys2024	• aaa	Delete
yyyy	2024-10-26	off_water	Grounds and Gardens	ys2024	• No activities	Delete
yyyy000	2024-10-10	off_water	Grounds and Gardens	ys2024	• No activities	Delete
siis	2024-11-22	on_water	Grounds and Gardens	ys2024	• bew • ys	Delete

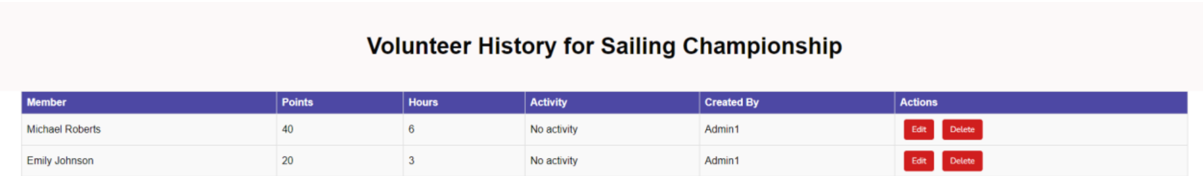
1. **Navigating to Event History:**
   - Click the **"Events History"** button from the main "Events" section (Screenshot 1).
   - The **Event History** page will display a list of all events, including:
     - **Event Name**, **Date**, **Event Type**, **Team**, **Created By**, and **Activities**.
     - **Actions**: You can delete events using the **Delete** button.

2. **Deleting Events:**
    - Click the **"Delete"** button next to an event to initiate deletion.
    - There are **two possible prompts**:
        1. **If the event has volunteer history:** A message will notify you that the event **cannot be deleted** because of existing volunteer records.
        2. **If no volunteer history is linked:** A confirmation prompt will appear: **"Are you sure you want to delete this event?"**
3. **Viewing Event Details:**
    - Click on an **Event Name** to view detailed volunteer history for that event



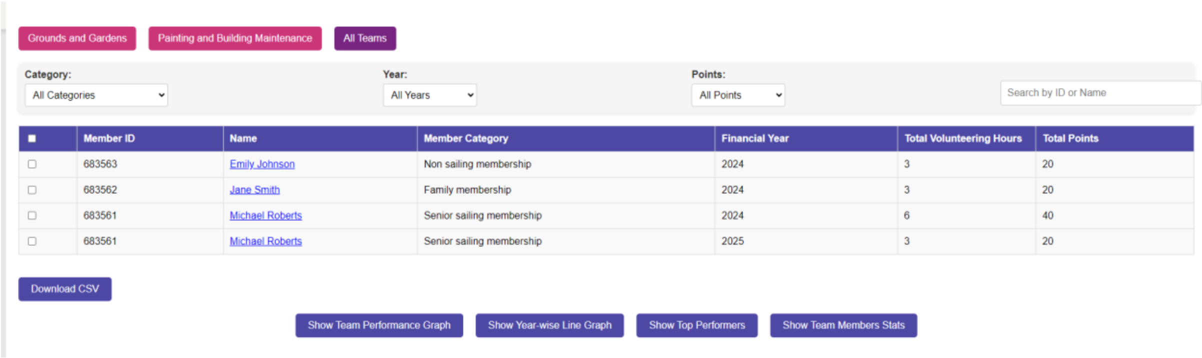
3.5.3. Viewing Volunteer History

1. **Navigating to Volunteer History:**
    - From the **Event History** page, click on the **name of an event** to view its associated volunteer history.
2. **Volunteer History Details:**
    - The volunteer history page shows:
        - **Member Name**, **Points Earned**, **Hours Worked**, **Activities**, and **Created By**.
        - **Actions**: You can **edit** or **delete** volunteer entries using the buttons provided.



3.6 Reports

3.6.1. Report and Performance Tracking Page



Categories: Allows filtering members by: Family Membership; Non-sailing Membership; Senior Sailing Membership

Year and Points Filter: Filter records by year or total points; Search members by ID or Name using the provided input field.

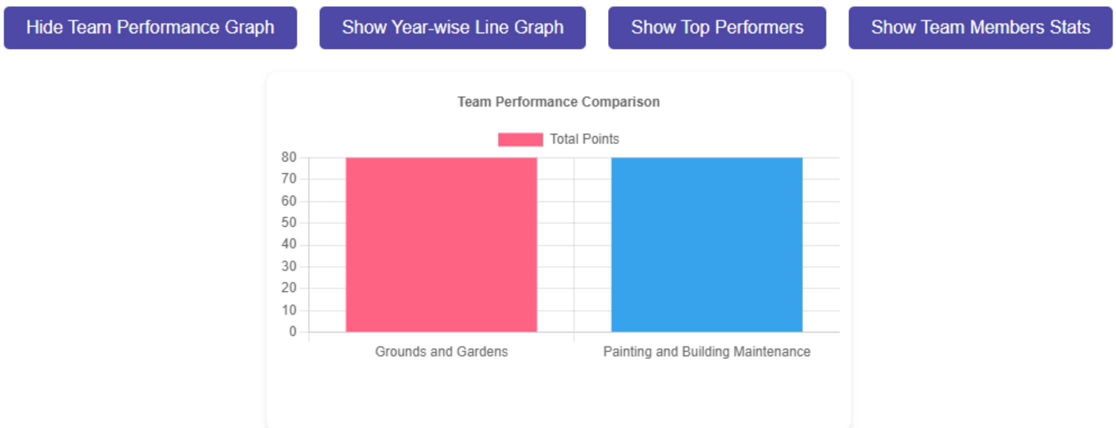
Actions on the Membership Page:

Select Members: Use the checkboxes to select one or multiple members from the list.

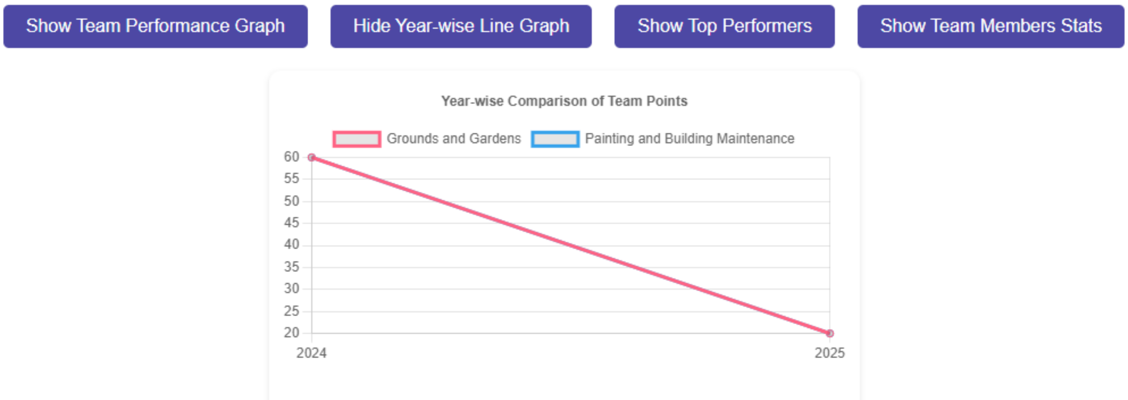
CSV Download: Click Download CSV to export the displayed data into a CSV file.

Visual Performance Insights:

Show Team Performance Graph: Displays a bar graph comparing total points between teams. A bar chart comparing total points between "Grounds and Gardens" and "Painting and Building Maintenance."



Show Year-wise Line Graph: Displays a trend of points earned over the years by each team. A line graph showing trends of points for teams over the years (e.g., from 2024 to 2025).



Show Top Performers: Highlights the members with the highest contributions using pie charts. Pie charts display individual member contributions for each team. Example: Grounds and Gardens: Michael Roberts and Jane Smith; Painting and Building Maintenance: Emily Johnson and Michael Roberts.

Top Volunteers by Team

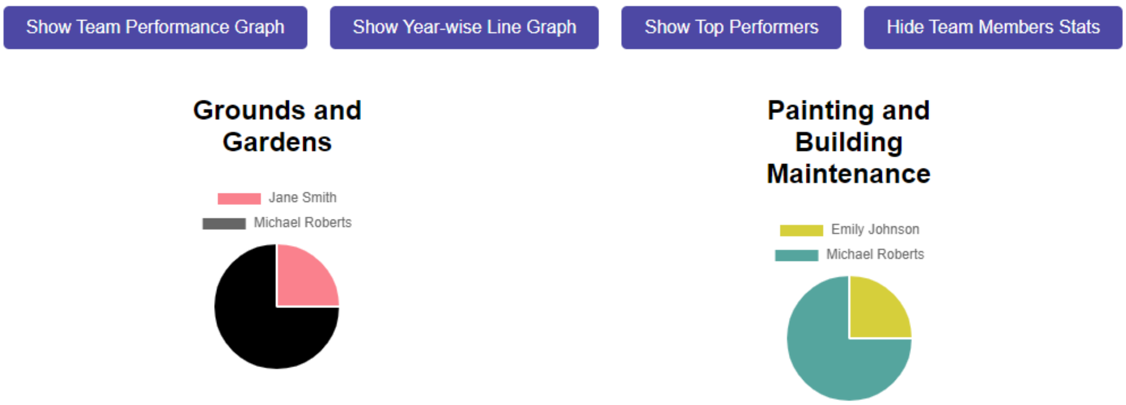
Grounds and Gardens

ID	Name	Total Hours	Total Points
683561	Michael Roberts	6	40
683562	Jane Smith	3	20
683561	Michael Roberts	3	20

Painting and Building Maintenance

ID	Name	Total Hours	Total Points
683561	Michael Roberts	6	40
683563	Emily Johnson	3	20
683561	Michael Roberts	3	20

Show Team Members Stats: Displays individual stats for members by team. A tabular display of members by team, showing ID, Name, Total Hours, and Total Points.



3.6.2. Report History

Report History

Search by event name

Event ID	Event Name	Date	Activity	Points	Hours	Created By	Actions
3	Sailing Championship	2023-08-10		20	3	Admin1	Edit Delete

1. **Accessing Report History:**
   - From the **Membership Page**, click on a member's name to navigate to their **report history page**.
2. **Report History Details:**
   - Displays records of events linked to the selected member, with columns for:
     - **Event Name**, **Date**, **Activity**, **Points**, **Hours**, and **Created By**.
3. **Actions in Report History:**
   - **Edit:** Modify an existing report entry.
   - **Delete:** Remove the event entry. A confirmation prompt will appear before deletion.

3.7 Change Password

The Change Password page allows users to securely update their account password. To protect your account, it is recommended to change your password regularly and ensure the use of a strong password.

3.7.1 Accessing the Change Password Page

You can access the Change Password page by clicking on "Change Password" in the main navigation bar.

Steps to Change Your Password

a) Enter Current Password: Enter your account's existing password in the "Current Password" field.
b) Set New Password: Enter the new password you wish to set in the "New Password" field.
c) Confirm New Password: Re-enter your new password in the "Confirm New Password" field. Ensure that the new password entered matches the one above to avoid issues due to typing errors.
d) Submit Password Change: Once confirmed, click the "Change Password" button at the bottom of the page to submit the changes. If there is an error with your input or if it does not meet the password policy, the system will display an error message, and you will need to make the necessary adjustments according to the prompts.

3.8 Logout

Click on "Logout" in the main navigation bar. You can log out to the current page.