Circles Applications Manual

CIRCLES USA
Building Community to End Poverty

Contents

Introduction

The Circles® Campaign is a national, transformational approach to reduce poverty that partners volunteers and community leaders with individuals and families wanting to make the journey out of poverty. There are many roles within the organization, e.g., circle leaders, allies, volunteers. They all play a part in helping those struggling financially and therefore require unique training and record tracking.

The Circles Web Application is meant to provide a friendly interface for Circles sites to store member, meeting, programming, and training data. This manual will detail how to get started using the application for site management. It is young and may undergo changes, but your data will remain safe in the cloud and persist through added features and bug fixes. Any requested fixes or added features are welcome and can be sent to nwitt12@gmail.com.

If you have not already registered an account, you may do so at www.circlesdb.com/register. Before your account can be activated, you need to indicate which site(s) you would like access to.

*This manual was created for version 1.0 and may be out of date if a newer version is deployed.

Getting Oriented

Figure 1. The members, meetings, and learning tab as seen at the top of the application.

After logging in, you will be redirected to the members tab. There are three main tabs that outline the functions of the application.

- Members - All member data exists in this tab. This is where you will create, update, and delete profiles. You can also search, filter, sort, and export profile data here.
- Meetings – All meeting data exists in this tab. You may schedule meetings, attach training or programs, and take attendance here.
- Learning – All programming and training data exist in this tab. You can create trainings and programs as well as manage which profiles have completed or will need to complete training.

Members

All member records will be created and edited within this tab. You can search for profiles by their fields, export data, and create lists of profiles.
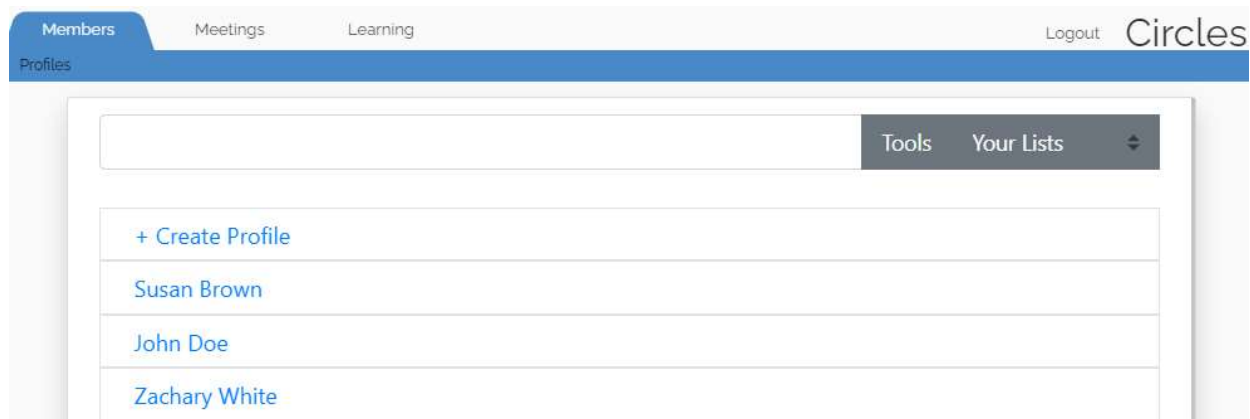

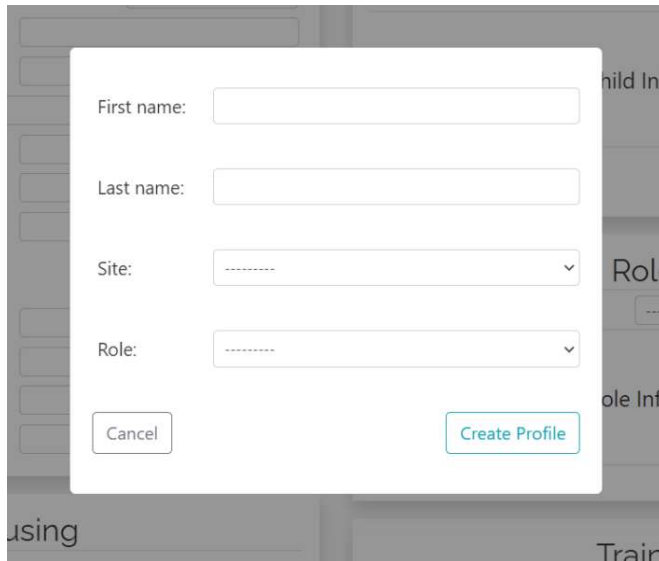Figure 2. Member tab main view.

Creating Profiles

Figure 3. Required fields for creating a profile

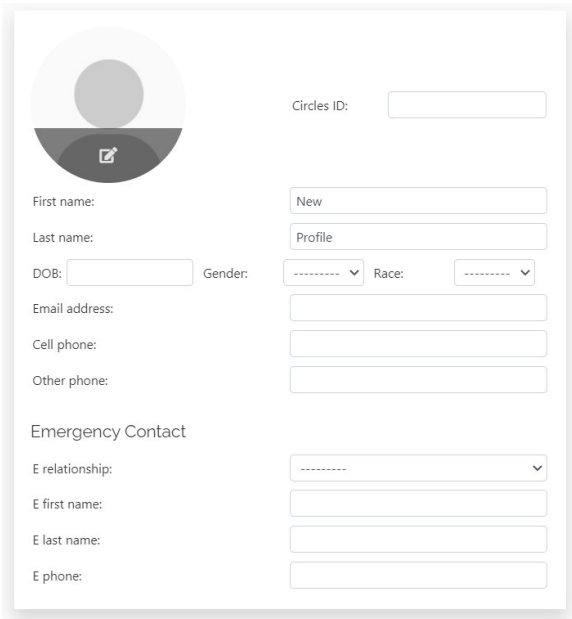To create a member, click on the

+ Create Profile

button. You will then be asked to enter critical information for the profile. Every profile must be assigned to at least one site through their role at that site. If you have access to more than one site, you will need to pick which site you are creating this profile in.

Editing Profiles

After creating a profile, you will be redirected to the edit screen, where you may fill in the rest of the information for the profile. If you are in the profile detail view, you may click the

Edit Profile button located at the bottom of the profile to edit profile fields.
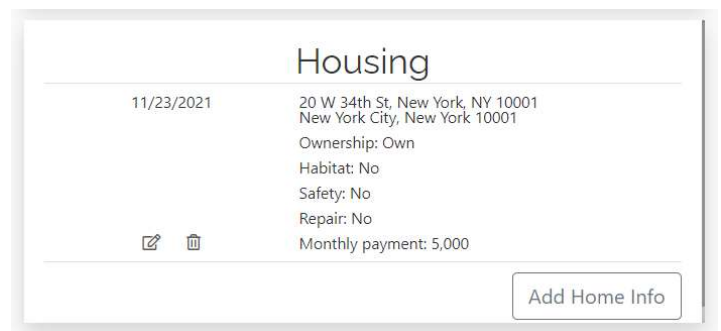

Figure 4. Core information tile

While viewing a profile, the first tile contains the core information for a profile. Here you can also add a picture of the member.

The next tile contains housing information for the member. You may add multiple homes and keep past homes here. The pencil button allows you to edit the data, the trash button allows you to delete the data, and the Add Home Info button allows you to create a new home instance.

Figure 5. Housing information tile

If you would like to add children information to the profile, click the Edit Children button to navigate to the children page.
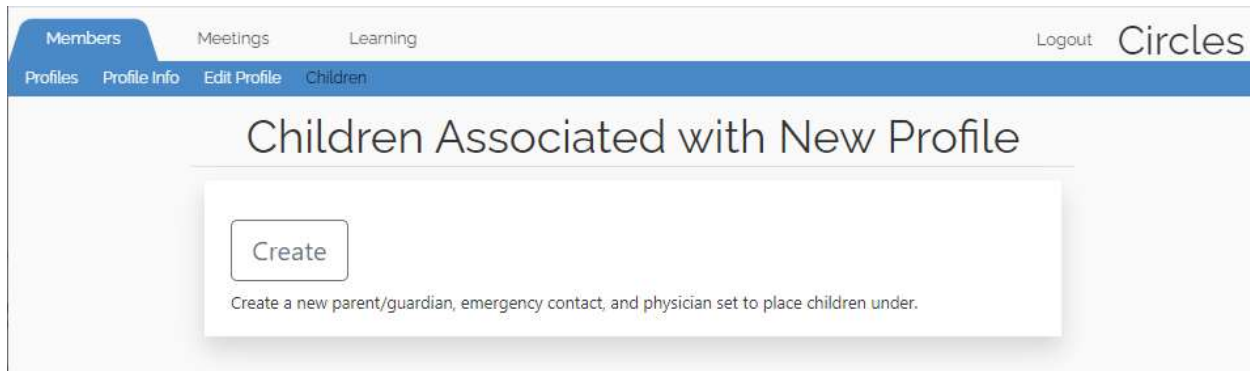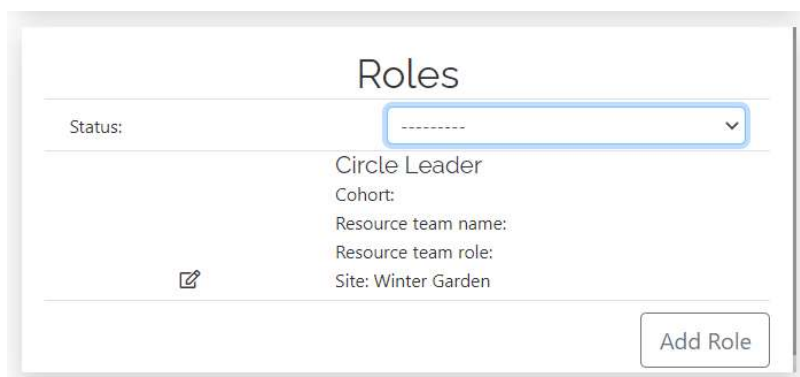
Figure 6. Edit children page.

Here you will need to create an emergency contact to place the children under. Each child associated with this profile can be placed under one of the emergency contacts created for this profile.

Figure 7. Role information tile.

This is the roles tile. You can change the status of the member and add, edit, and delete roles in whatever sites you have access to. A member must always have at least one role, but it does not have to be a current role.

The training tile contains all training themes and modules that are required for this profile. If they are completed by the member, the date completed field will display the date that the member finished this training. The training button will take you to the training tab where you may manage your training modules. You may not edit anything in this tile.

Figure 8. Training information tile

Searching Profiles

Now we will switch to the profile search view. The input field at the top of the page is used to search by name in all sites that you have access to. The tools button reveals extra fields that will give you more functionality in your search. The lists select field will apply previously saved search configurations for quick recall. These lists will also be available to take attendance with.
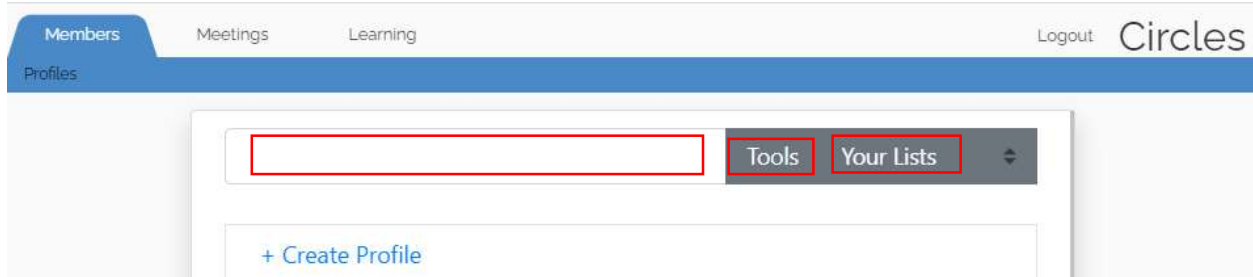

Figure 9. The search input, tools button, and list select as seen from the members tab.

Tools

- Filters – first select which profile field you want to filter by, then fill in the filter input. The ⊕ button will add the filter below so that you may add more filters. You can remove the filter with the x button.
- Sort By – this allows you to group the search results by a field. If you want your results grouped together by current role, select Current Role in the Sort By field.
- Data – if this value is given, each result will display the profile name, along with the values for the fields specified by the data tool. The ⊕ ⊖ buttons allow you to add and remove data fields.
- Create List – this will save the applied filters so that you can quickly access this group of profiles later, e.g., a list of all current circle leaders. If you have access to more than one site, you may want to create a list for each site. These lists will be used to take attendance for your meetings as well.
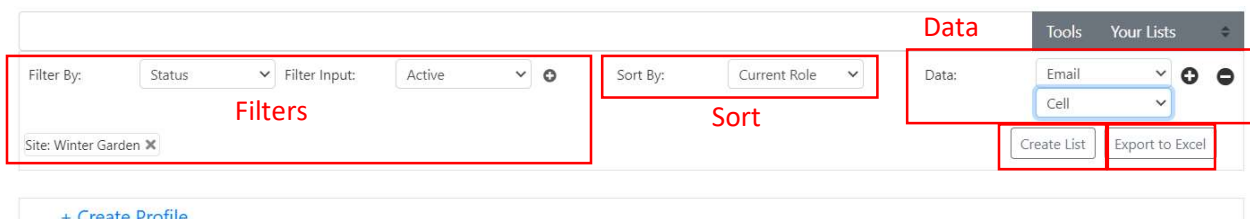- Export to Excel – quickly export the current search of profiles and data to an excel file.

Figure 10. Annotated toolbox in the members tab.
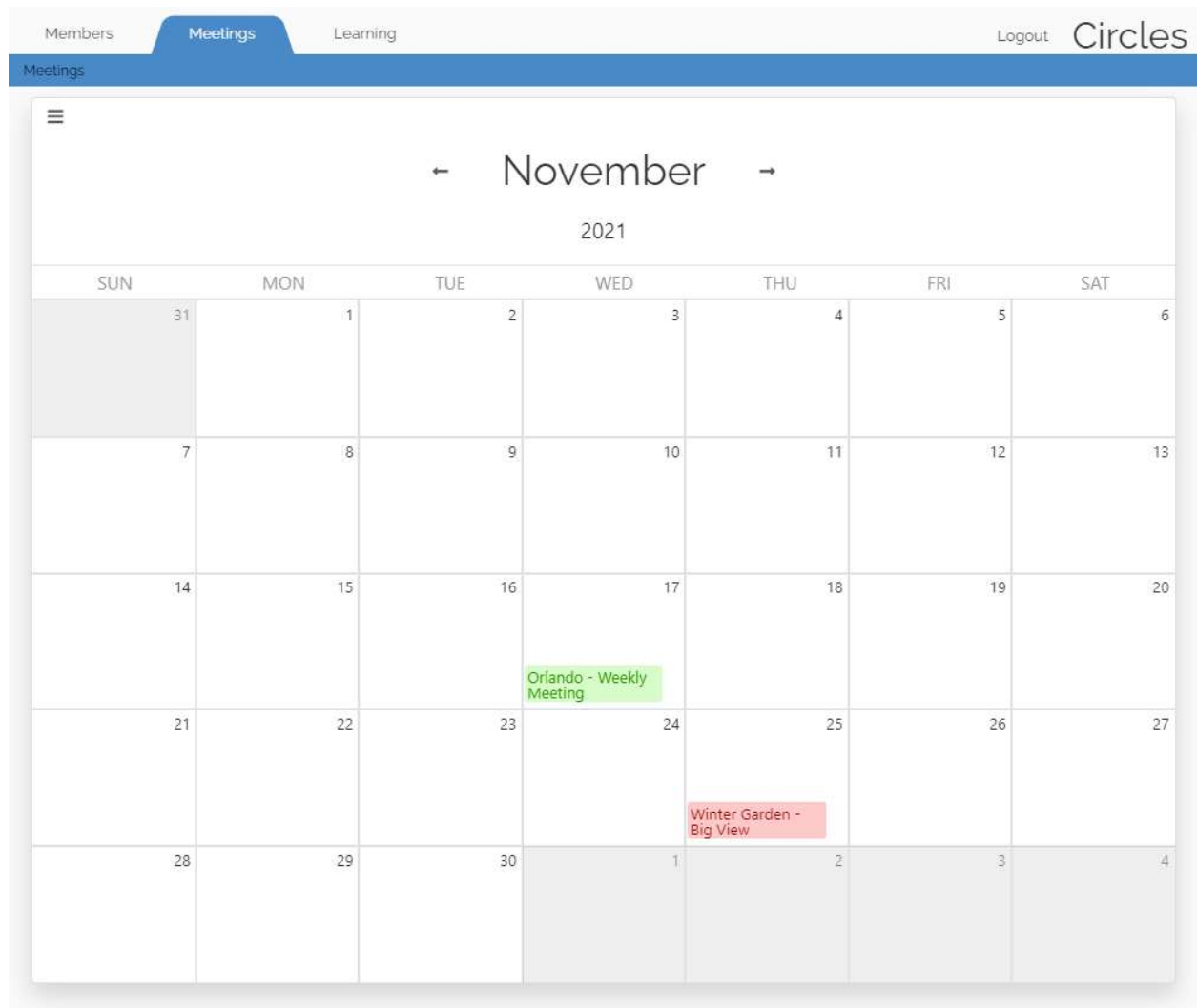
Meetings

Figure 11. Meeting tab main view.

Creating Meetings

You may view multiple sites' calendars at one time, so make sure you have the desired site(s) selected. This can be done by clicking the ☰ button in the top left.
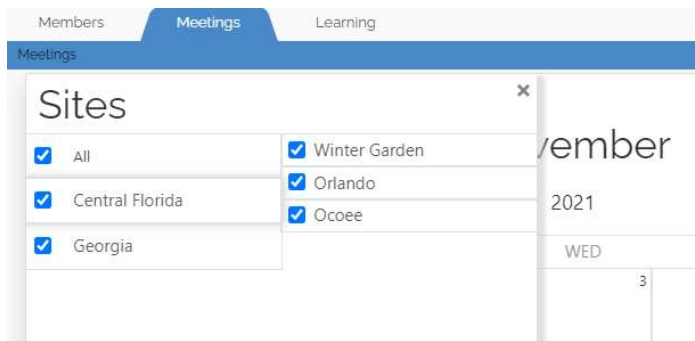

Figure 12. Site select window.

The sites window will open, in which the left row lists the regions. Click on the region text to display the sites within that region. Checking the box next to the region will select and deselect all the sites within that region. Checking the box for the individual site will select or deselect that site. This same window is also used for the Learning tab.
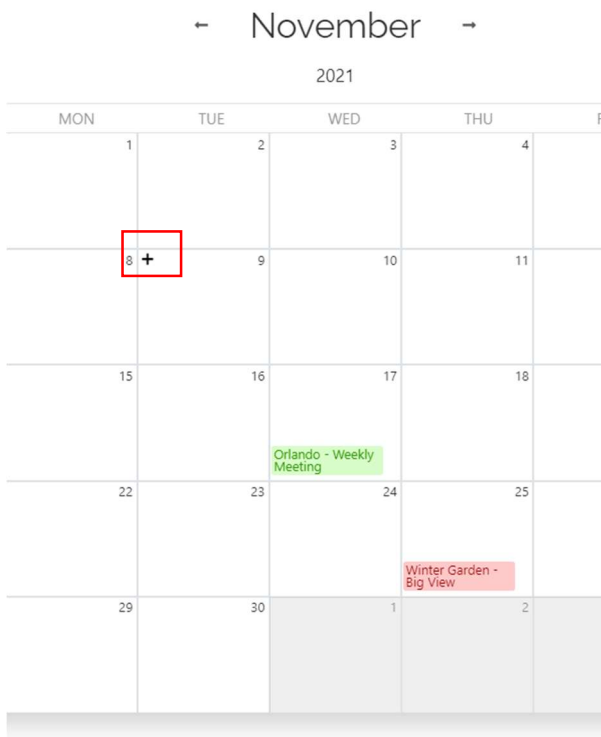

Figure 13. Add meeting button.

Hover over the date you would like to have a meeting. Press the + button in the top left corner.

Figure 14. Meeting slide.

The meeting information slide will pop up.

- Make sure to choose the site and meeting type.
- If you would like to make duplicate meetings on multiple dates, select more than one date with the date picker.
- Attach programs that you make in the Learning tab.
- Attach training that you create in the learning tab. In the attendance portion of the meeting, you may choose if you would like your attendees to complete the attached trainings.
- Write notes in the main section.
- Link to outside sites.
- Attach files to the meeting.
- You must save after every change.

Meeting Attendance

Click on the [Attendance] button to open the attendance slide.

In order to take attendance, you must select the lists that you would like to take attendance with (lists were created earlier in the members tab). The create lists button will take you to the members tab so that you can create a list. More than one list may be selected.

If you have a training attached to the meeting, you may give the attending profiles a completion for that training. To pick who receives the completion click on the highlighted Selected (Figure 16).
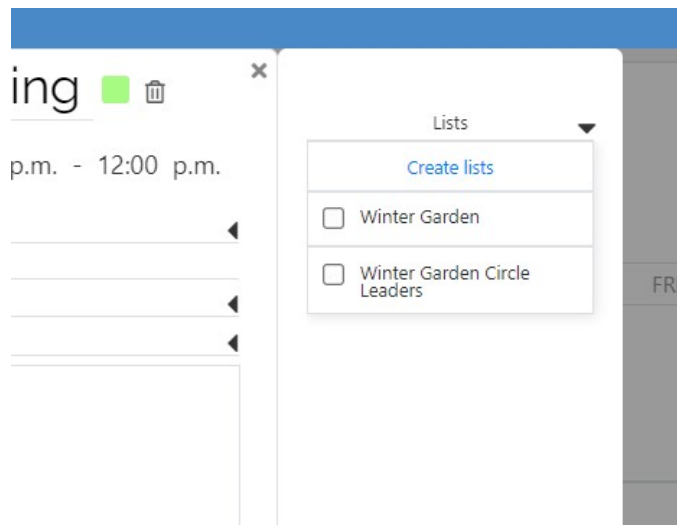

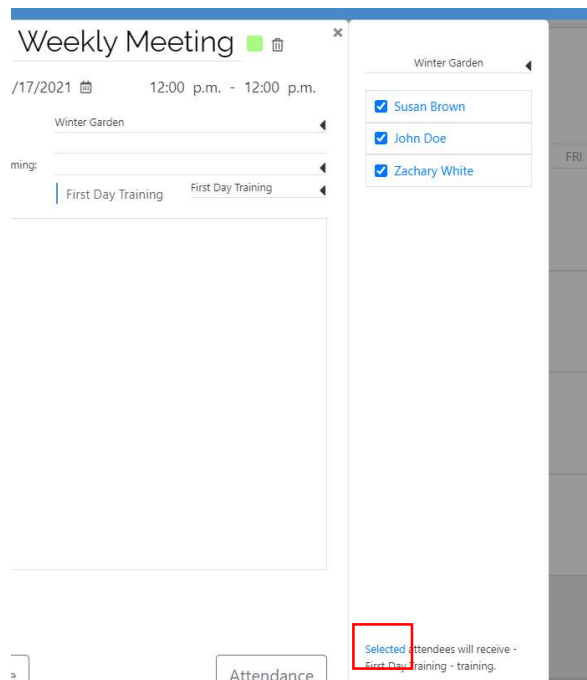Figure 15. Attendance slide with the list select open.

Figure 16. Taking attendance with a training attached.

You may choose for all attendees to receive the completion, or you can select individual attendees (Figure 17).
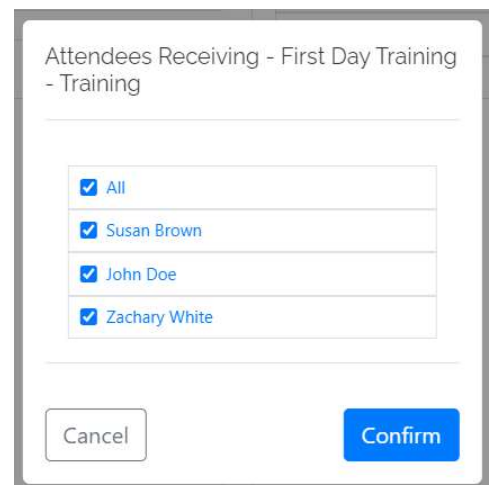

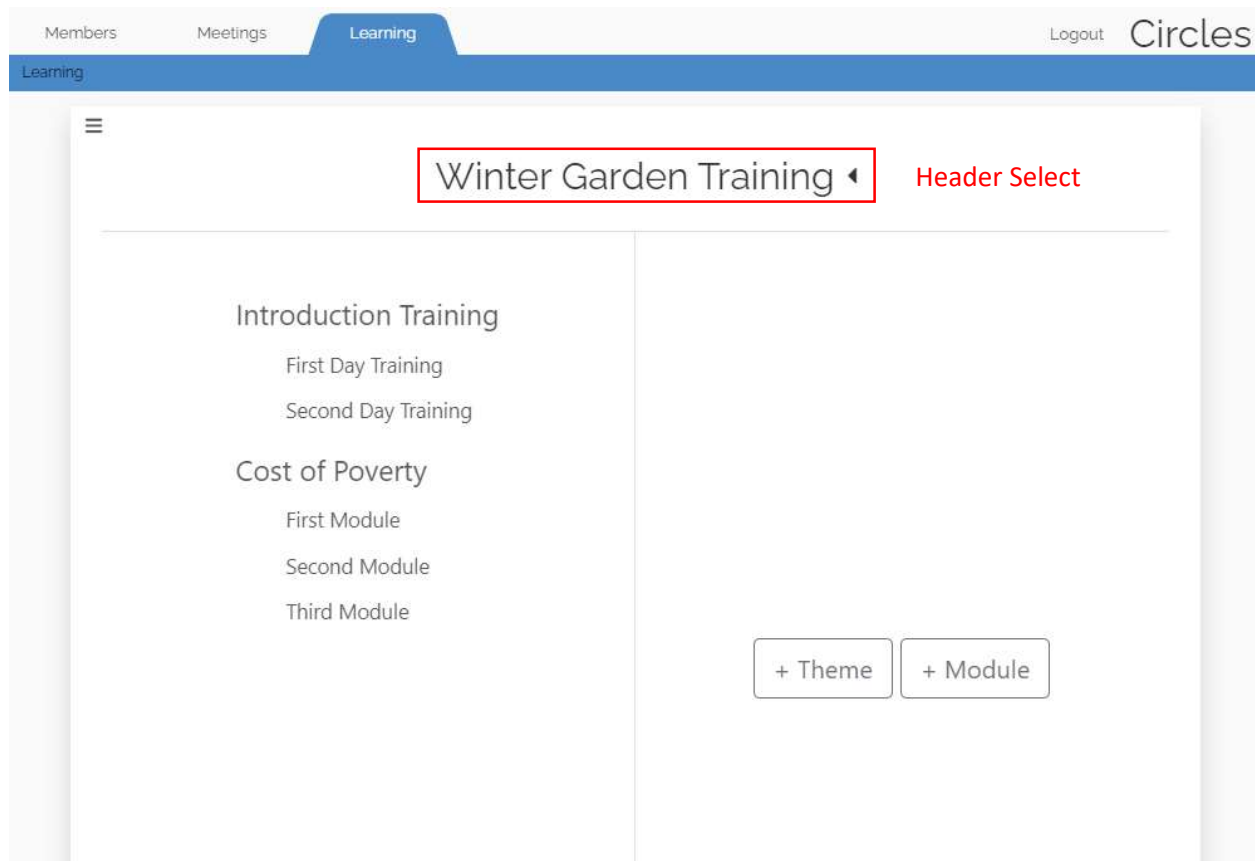Figure 17. Selecting attendees to receive training.

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Learning

Figure 18. Learning tab displaying the training view with an annotation for the header select.

The learning portion of the Circles application is organized by programming and training. Programming is used for planning meetings and consolidating the corresponding resources. Training is used for planning circles curriculum as well as managing curriculum completion. You may switch between the two views through the header select (Figure 18).
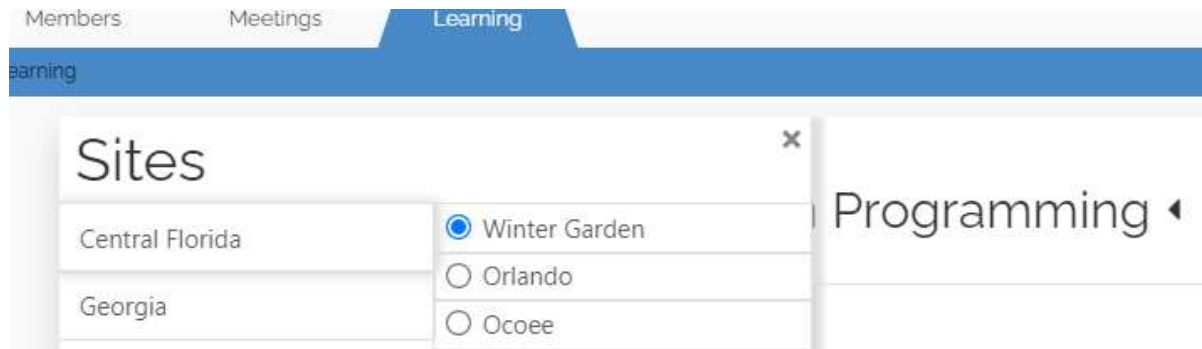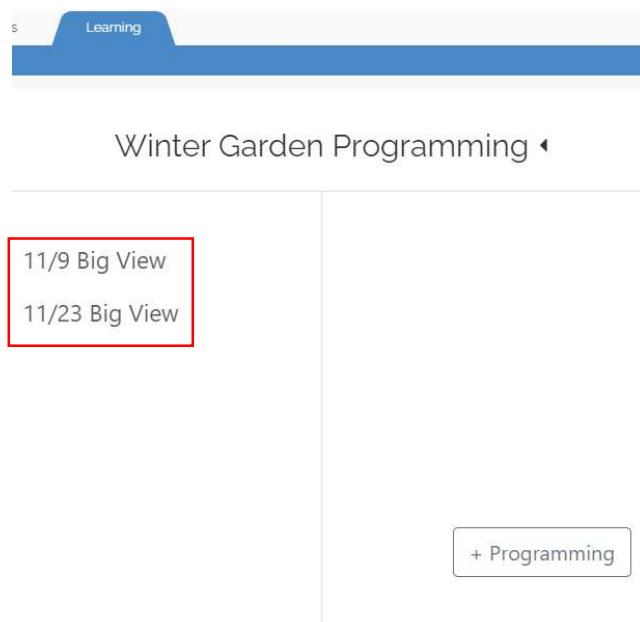
Programming

Figure 19. Site select displayed within the Learning tab.

Just like in the meetings tab, you may select from multiple sites to work in. Make sure that the desired site is being viewed. The only difference from before is that a user may only view programming or training for one site at a time.

In the programming view, you will see a list of all the programs for the site on the left. To create a new program click the + Programming button.

Figure 20. Programming view showing the existing programming for this site.

When creating a new programming, you must give it a title and a site. Titles will be suggested based on titles from all sites in an effort to keep naming conventions consistent. The currently viewed site will be automatically selected, but there is the option of adding this new programming to multiple sites at once. Site-specific fields (like facilitators) should be left blank for now so it can be edited later. Outside resources, e.g., presentations, may be added through files and links.

Figure 21. Programming creation view with site select open.

Profiles created in the members tab can be linked to programming and training as facilitators. As a name is typed in, the current site will be searched for matching profiles. If the suggestion is selected, the profile will be linked, but clicking the + button allows you to add a name without linking in case this facilitator is not in the database.

Figure 22. Facilitator autocomplete field showing suggestions to link.
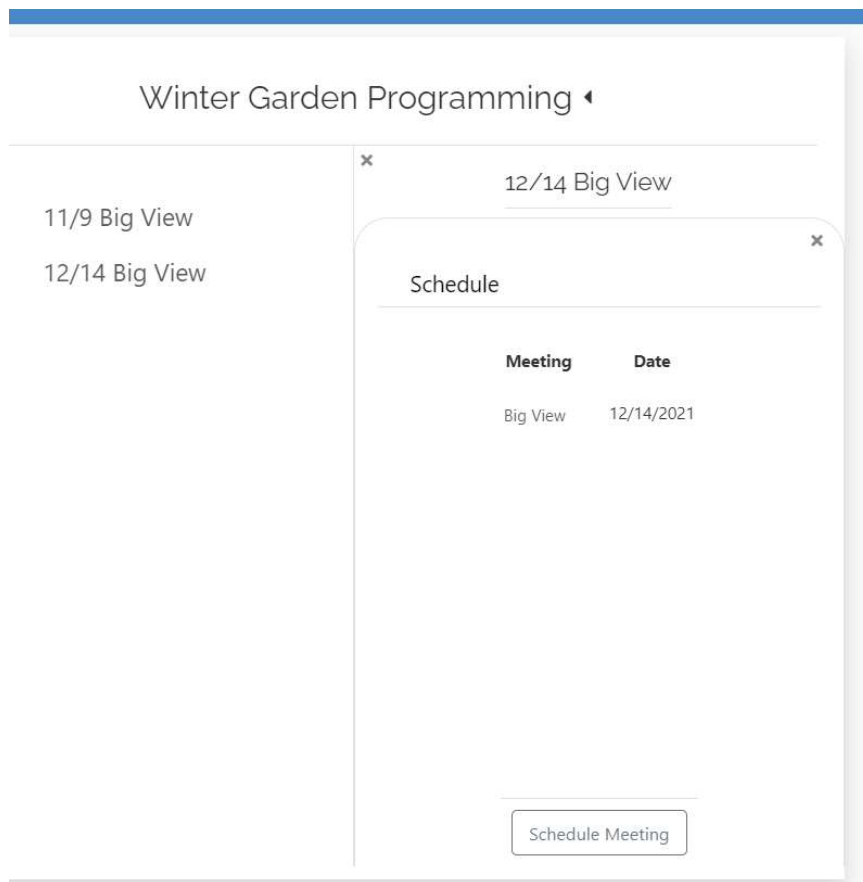
By clicking the [More Info] button, upcoming meetings with this programming attached will be displayed. Clicking the [Schedule Meeting] button will navigate you to the meeting tab in the create meeting view with this programming attached.

Figure 23. Programming schedule popup with upcoming meeting displayed.

To edit a program, click the [Edit] button. It is possible to edit a program in multiple sites at once through the site field. Each site that doesn't contain the edited program will receive it after saving. (Tip - this function can be used to copy programs to other sites). Since some fields may be site-specific, you have the option to edit only standardized fields. After choosing multiple sites, all the fields will be removed from editing (Figure 24), and you must manually pick which fields you would like to overwrite (Figure 25)
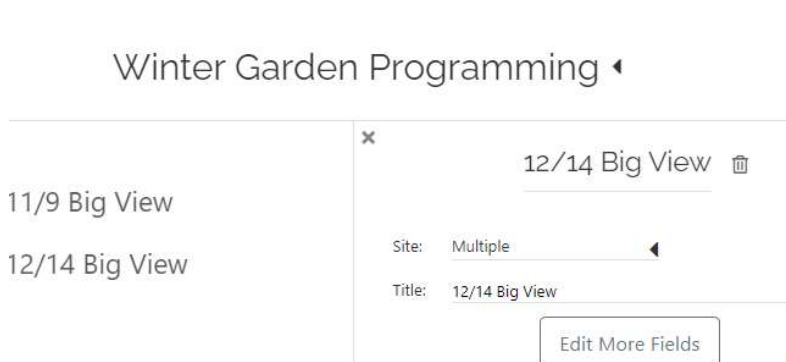

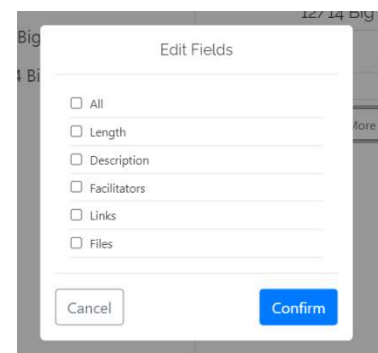Figure 24. Programming edit view after selecting multiple sites.
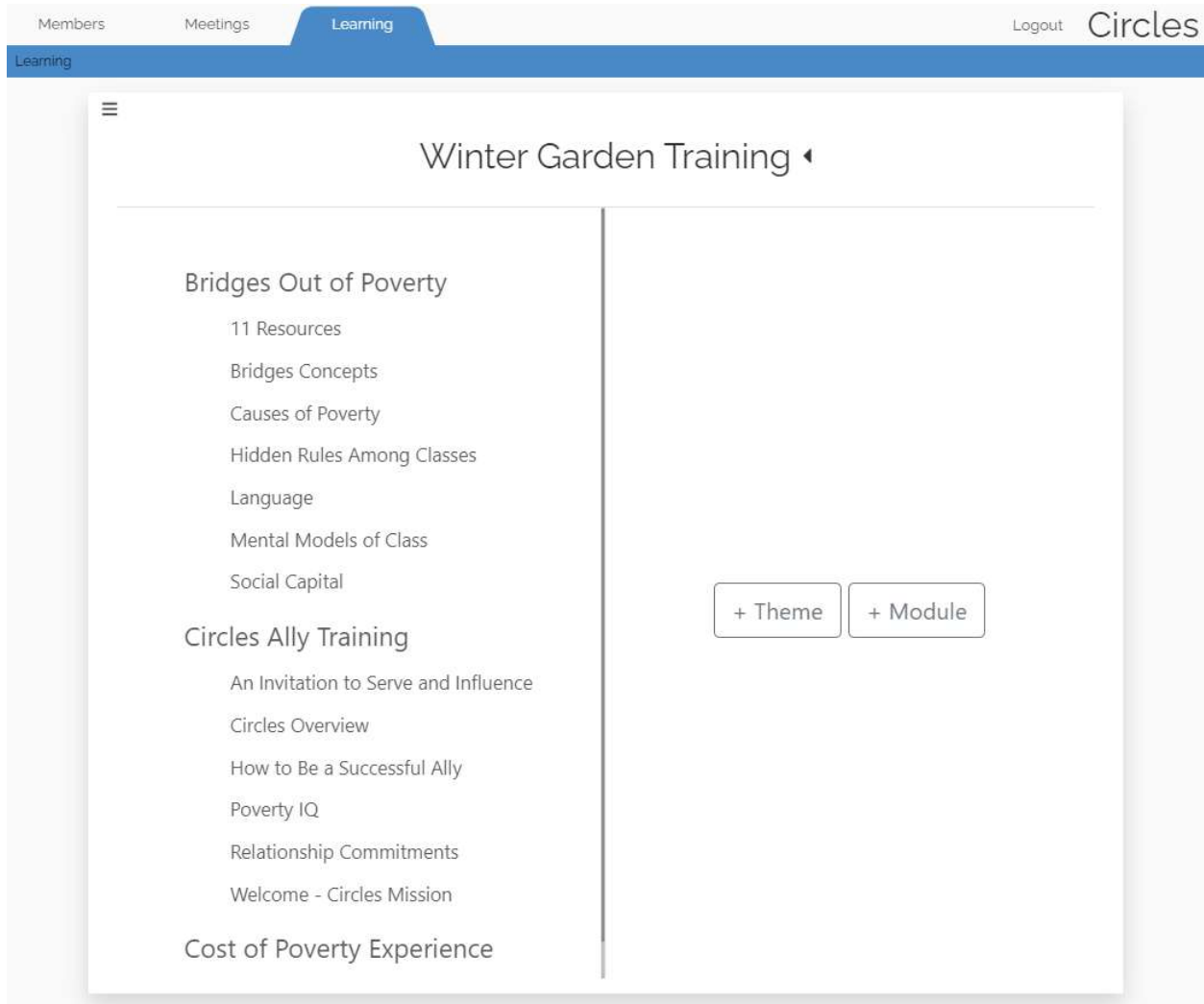

Figure 25. Edit field select.

Training

Figure 26. Training view displaying all training themes and modules for the Winter Garden site.

Training is structured and functions very similar to programming, however, training modules are organized under themes. All the operations that can be done for programming also applies to training. Here we will introduce some functionality that is specific to training, such as required roles and member completion.

Figure 27. Theme creation view displaying the required for options

While creating a new theme, you can provide "required for" roles. If every module within this theme is required for certain roles, you may check the corresponding roles. If you need to complete this on a module-by-module basis, that can be done as well. If a module is added to a theme, its "required for" field will be automatically filled out, but you can add more roles if needed.

Once a member has completed every module within this theme, they will receive completion for the theme. Note, if you create a new module within a theme, a member who already has completion for that theme will retain their status. If you would like to remove their theme completion you must do so manually.

Figure 28. Module creation view.

Before you create a module, make sure to create a theme for it to reside. In the module creation view (Figure 28), pick the theme, site, and title to add a module. Editing modules and themes for multiple sites works just like the programming, as explained before. To copy an entire theme to another site, you unfortunately must go through each module manually and add it to the other site.

Trainings, like programs, have a "more info" pop-up which contains a section for scheduled meetings. In addition, trainings contain a Members Completed tab, to manage which members have completed the training (Figure 29). You can remove members from this by clicking the [Remove Member] button and selecting trash cans next to desired profiles. If a member is removed from this list, it will be marked as incomplete on their profile. They will also lose corresponding theme completion if they had it before. You may also add members by searching the site by name through the Add Member modal (Figure 30).
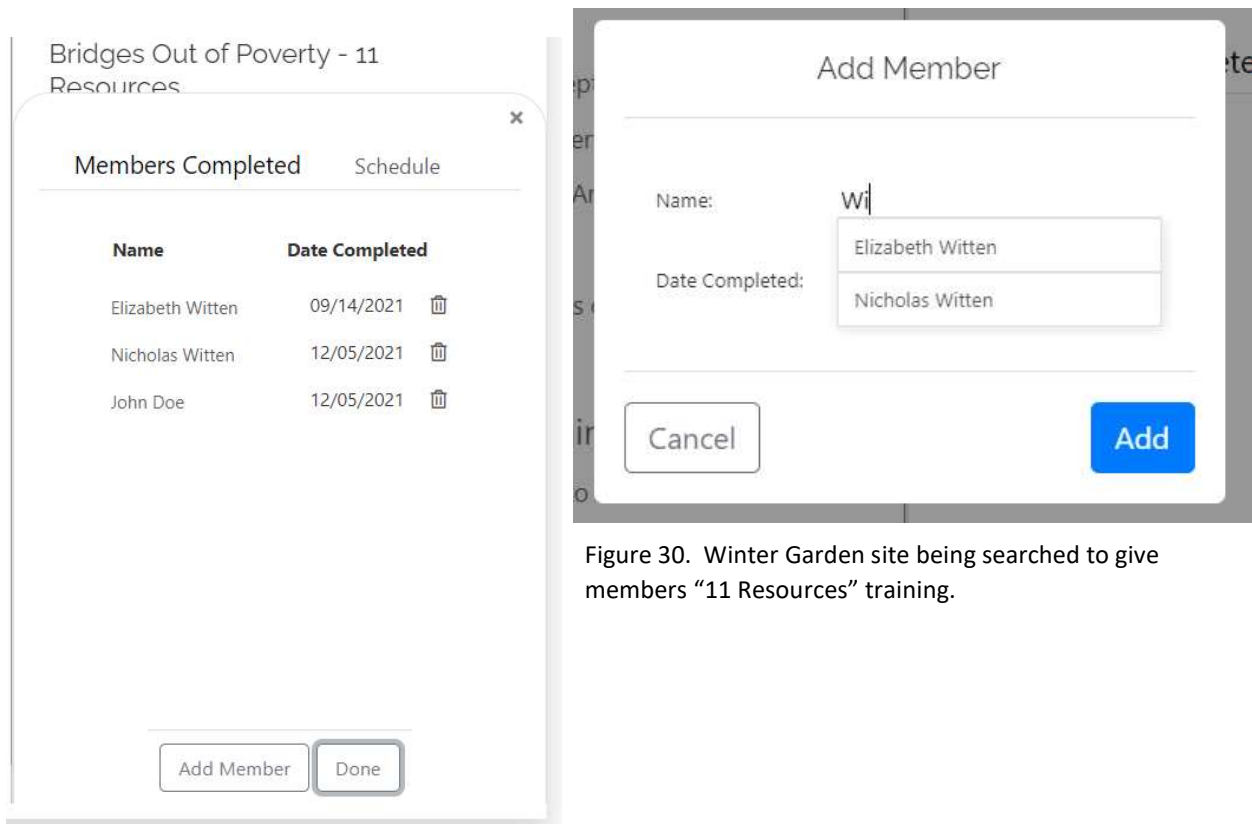

Figure 30. Winter Garden site being searched to give members "11 Resources" training.

Figure 29. Training pop up with delete member mode active.

Conclusion

        Now you know the basics to using the Circles Application. More features will likely be added in the future, e.g., data visualization, but these basics should remain relatively constant. Hopefully this application will fit your needs and make you workflow more efficient. Data export is always an option and if you have a specific request just contact nwitt12@gmail.com. Let's make an impact!