## Program Information and Sites Instruction Guide

M2HL Update Portal



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- Editing program information
- Program Sites
  - Adding program sites
  - Adding new locations to the database
  - Adding program site information (new items identified with NEW! (pages 43-45)
  - Removing program sites
- Help/support information

### Important!

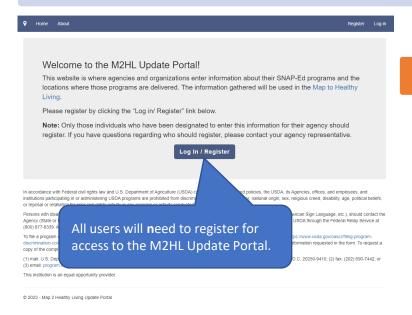
#### Before you begin:

- Use either the *Mozilla Firefox* or *Google Chrome* browser when working in the M2HL Update Portal.
- **Do not use Internet Explorer** as your browser as it does not support the functionality in the portal.

## Registration/Logging in

#### Registration

- ☐ All users will need to register for access to the M2HL Update Portal.
- Go to http://updateportal.map2healthyliving.org/.
- Click the "Log In/Register" button to register.



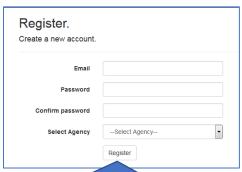
You'll want to make sure you are the person from your agency who should register. Check with your agency representative if you are unsure.

#### Registration

• Click the "Sign Up!" button to begin the registration process.



 The "Register" window will appear. Enter your email address and a password, then select your agency and click the "Register" button.



Enter your email address and a password, select your agency, then click "Register".

Note: Passwords must have:

- at least one non-letter or digit character (i.e. special character such as \$,\*,%, etc.)
- at least one digit ('0'-'9')
- at least one uppercase character ('A'-'Z')

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#### Registration

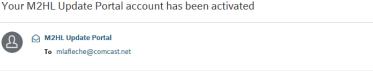
 After you've registered, you will see a message stating your account is being reviewed.



 You will also receive an e-mail message letting you know your account is awaiting activation.



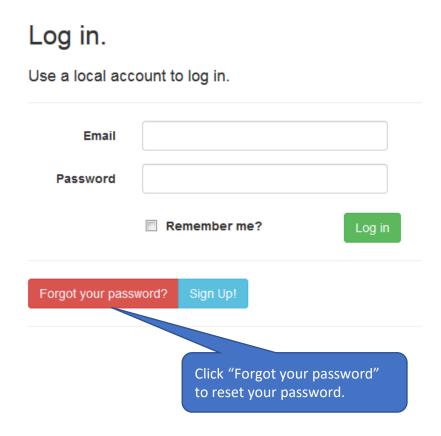
 When your registration is approved, you'll receive a confirmation e-mail message letting you know you have access to the site.



Your M2HL Update Portal account, <a href="mailto:mlafleche@comcast.net">mlafleche@comcast.net</a>, was activated. You now have access to the site. To log in, go to: <a href="http://updateportal.map/haelthyliving.org">http://updateportal.map/haelthyliving.org</a> if you have any further questions, please feel free to contact us on the 'Contact' tab on the site. M2HL Update Portal Team

#### Logging In

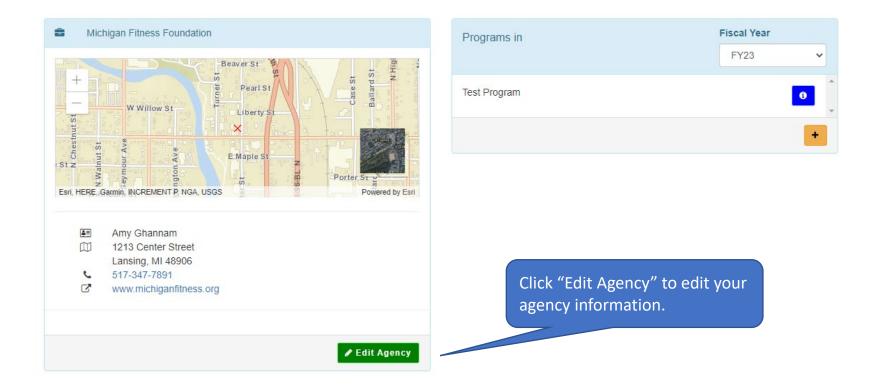
- Once your registration is approved, you'll be able to log in to the M2HL Update Portal. Log in to the site using the user name and password you specified when registering.
- If you've forgotten your password, click the "Forgot your password?" link and follow the provided directions.



# Editing Agency Information

#### **Editing Agency Information**

- After logging in, you'll see the home page or "Partner Dashboard."
- Click the "Edit Agency" button to edit your agency information.

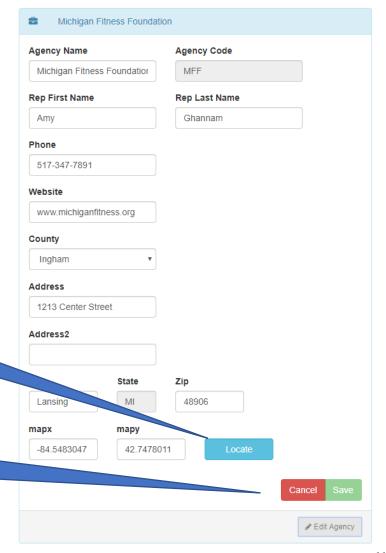


#### **Editing Agency Information**

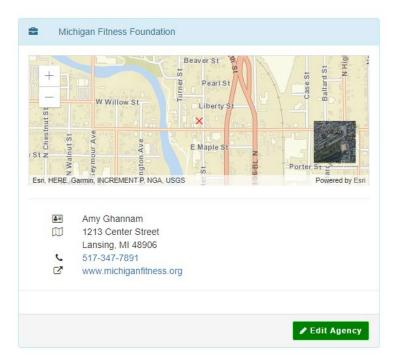
- Verify the information for your agency is correct and complete any missing information.
- After making changes to your agency information, click the "Save" button to save the changes.

If you change the information for your agency, click "Locate" to geocode the location.

Click "Save" to save changes to your agency information, or "Cancel" to cancel the operation.

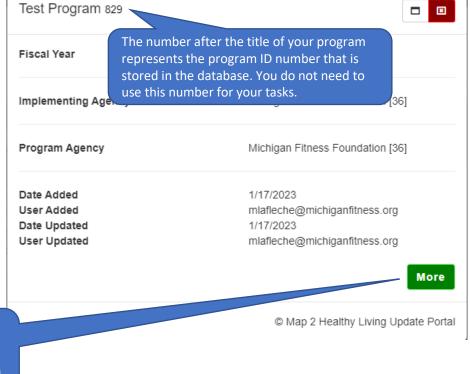


- To edit your program information, go to the M2HL Update Portal home page (Partner Dashboard).
- Click the "i" icon to the right of the program title.



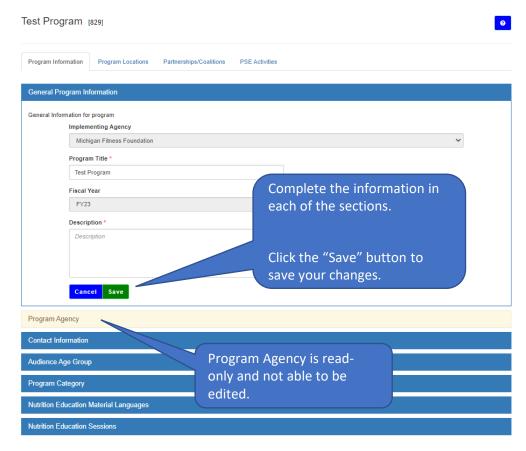


- A popup window displaying some of your program information will appear.
- To complete your program information, click the "More" button in the bottom righthand corner of the popup window.



Click the "More" button at the lower right-hand corner of the popup window to complete or edit the program information.

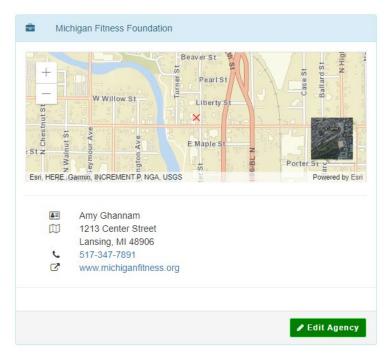
- A window displaying a menu of section headings will appear. In the "General Program Information" section, make sure the Program Title is correct and enter a description of the program into the "Description" text. The greyed out fields are read-only and can't be edited. Click "Save" when you are done.
- To open another section, click on it. Follow the directions provided to complete the information, then click "Save" to save your changes.
- Repeat for each of the remaining sections. Note that the "Program Agency" section is read-only and not able to be edited.

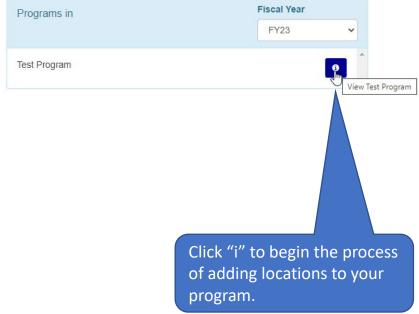


## **Program Sites**

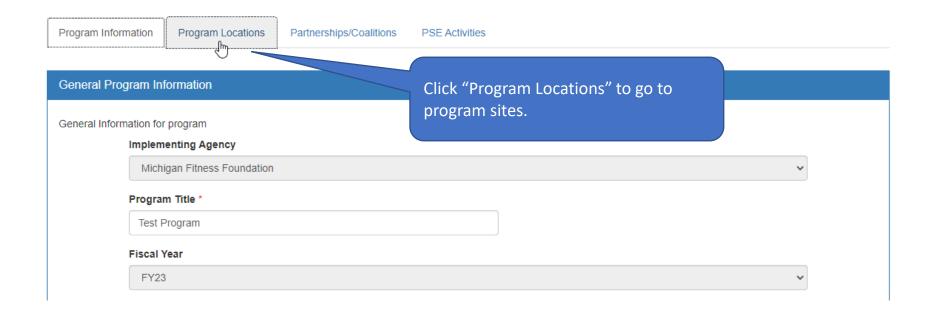
#### **Adding Program Sites**

• To begin the process of adding locations, from the home page/Partner Dashboard, click the "i" icon to the right of your program title.

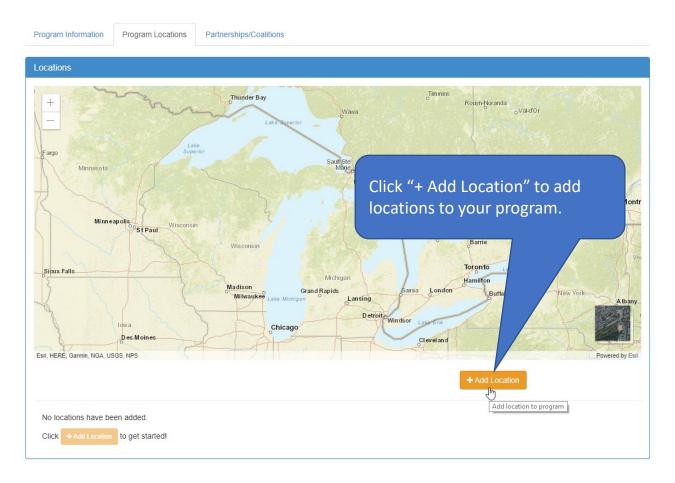




• Then click the "Program Locations" tab.

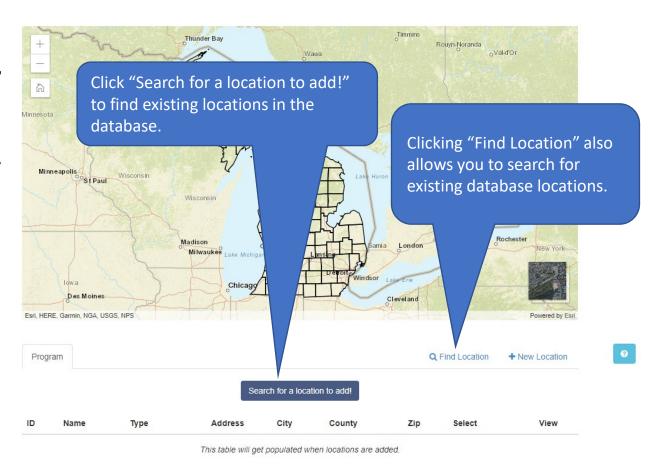


• To add a location, click the "+ Add Location" button.

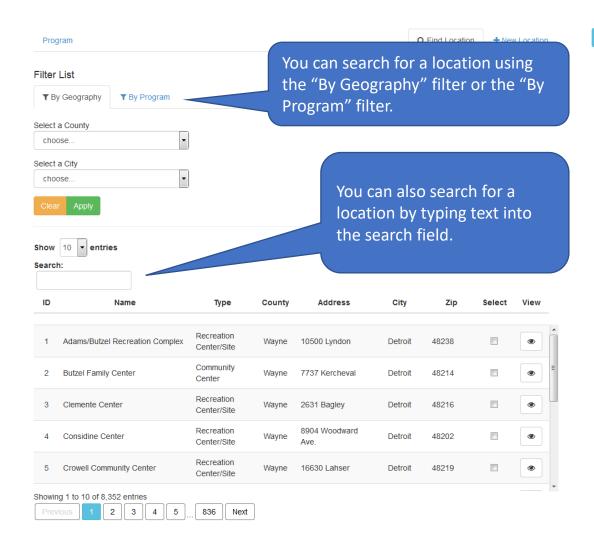


 Click either the "Search for a location to add!" button or the "Find Location" link to search for existing locations in the database.

(Note: The reason for first searching for an existing location is because many location addresses already exist in the database. There is a strong chance the location address you want to add to your program is in the database.)

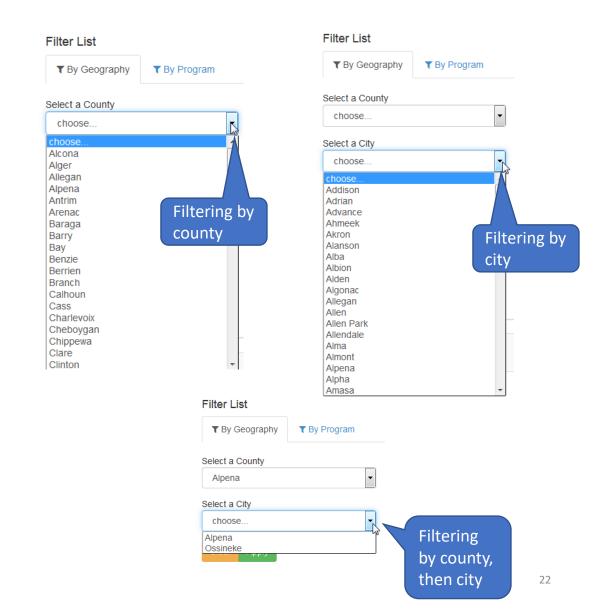


- When searching for an existing location in the database, you can use the filters "By Geography" or "By Program."
- Typing text into the Search field also allows you to search for specific locations.



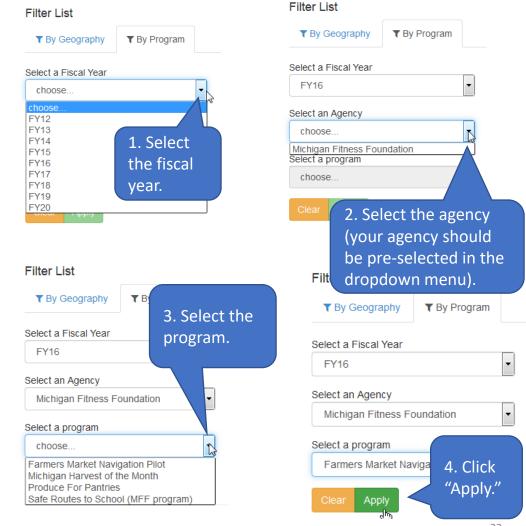
Filtering "By Geography" allows you to search for locations by county and/or city.

- If searching by county: only:
  - Select the County from the "Select a County" dropdown menu, then click "Apply" to apply the filter.
- If searching by county, then city:
  - First select the county, then select city from the "Select a City" dropdown menu. Click "Apply" to apply the filter.
- If searching by city only:
  - Select the city in the "Select a City" dropdown menu, then click "Apply" to apply the filter.



Filtering "By Program" allows you to search for locations by your agency's previous fiscal year program(s).

- Select the fiscal year.
- Select the agency (your agency should already be selected).
- Select the program.
- Click "Apply" to apply the filtered options.

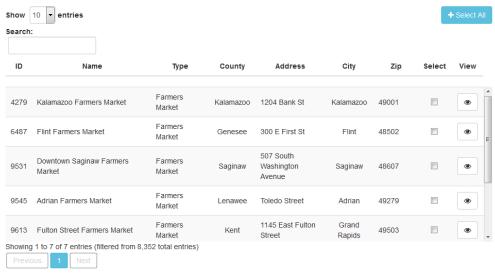


The filtered list of locations appears with a map at the top of the list.

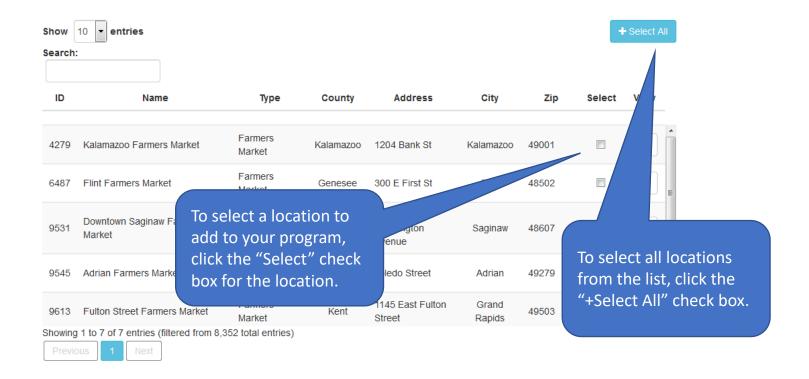
The map includes a red circle for each of the locations in the list.

After performing a search, a map appears and shows where each of the addresses in the list is located.

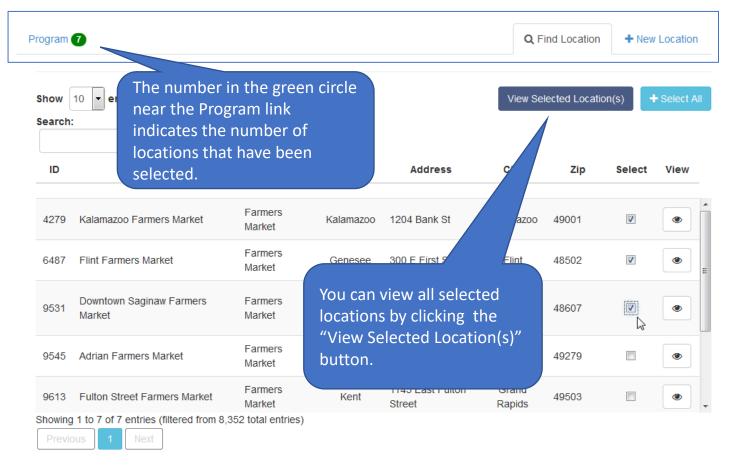




- To select a location for your program, click the check box in the Select column.
- To select all locations, click the "+ Select All" button.

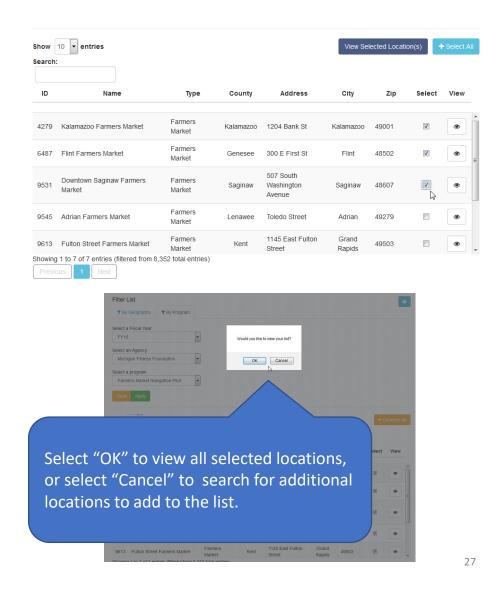


- When you select a location or locations for a program, the "View Selected Location(s)" button appears.
- You'll also notice a green circled number appear to the right of the "Program" link.
  This indicates the number of locations that have been selected.

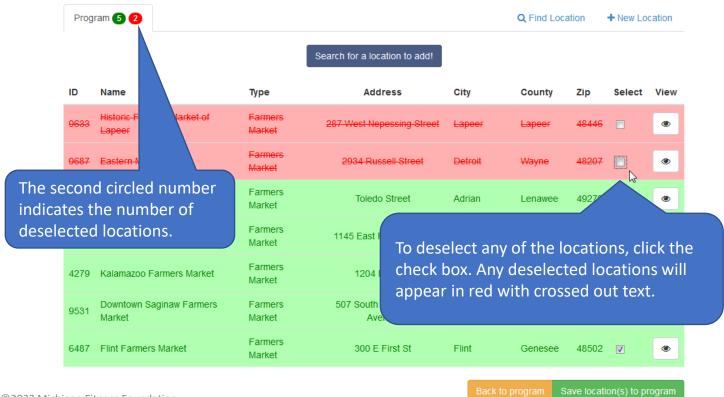


If you click the "+Select All" button to select all locations in the list, a popup window will appear with the question "Would you like to review your list?"

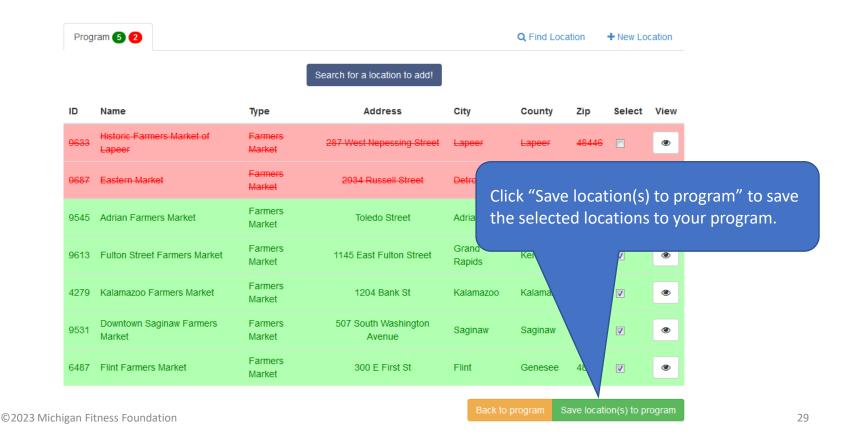
- Selecting "OK" will take you to the list of locations you have selected
- If you select "Cancel," you can search for other locations to add to your list of selected locations.



- When viewing the list of selected locations, you can deselect any that you do not wish to add. To deselect a location, click the check box in the "Select" column which will remove the check mark from the box.
- Deselected location(s) will appear in crossed-out text. The number of deselected locations will appear near the Program header in the upper-left corner of the list.

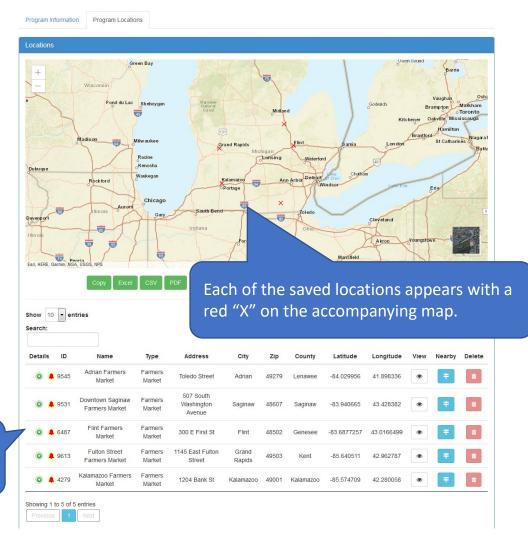


- The final step is to save the selected locations to your program.
- To save the locations to your program, click the "Save location(s) to program" button.

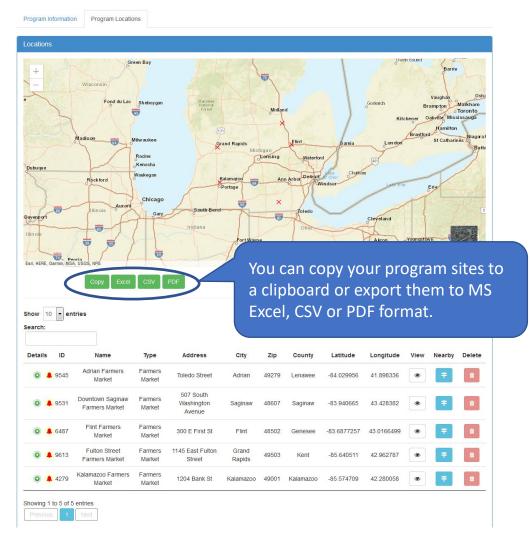


- Your list of saved program sites will appear.
- The locations are also shown on the map above the list with a red "X" at each location.

The list of your saved program sites appears.



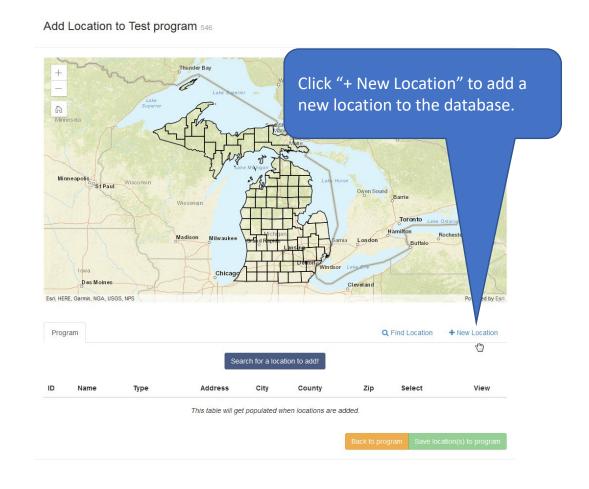
- You can copy your list of saved locations to a clipboard or export the list to MS Excel, CSV (comma separated value), or PDF file format.
- To do this, click the button for your desired export option.



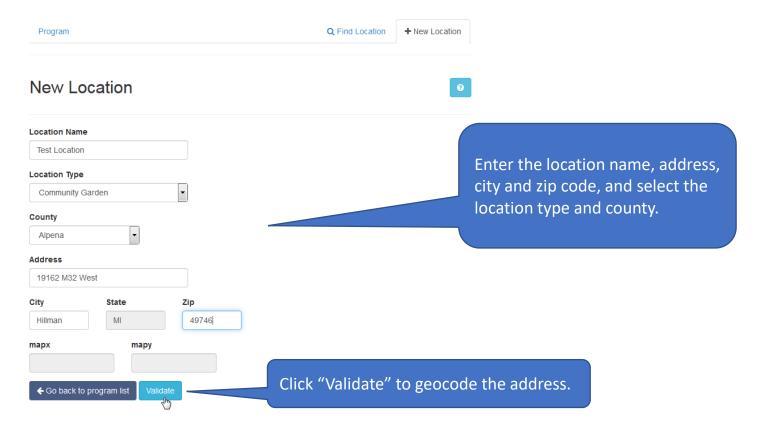
### **Program Sites**

**Adding New Locations to the Database** 

- If you search for and do not find an existing location that matches your program site, you can add a new location to the database.
- Click the "+ New Location" link to begin the process of adding a new location.



- Enter the location name, address, city and zip code, and specify the location type and county in which it is located.
- Then, click the "Validate" button to geocode the address.



- Any existing locations with a similar address will appear in a "Nearby Locations" popup window.
- If there is already an existing location with the same address, you will see the message "Duplicate(s) Found!"
  - If the location has a duplicate address and location type, it will be highlighted in red.
  - If the location has a duplicate address but a different location type, it will be highlighted in yellow.

(Note: Duplicate locations can have different IDs.)

- To select one of the existing locations, click the check box for the location. The location will be added to your list of selected locations.
- If the location requires a new entry in the database (i.e., it is truly different than the duplicate(s) listed), you can click the "Close" button to continue the process of adding the new location to the database.

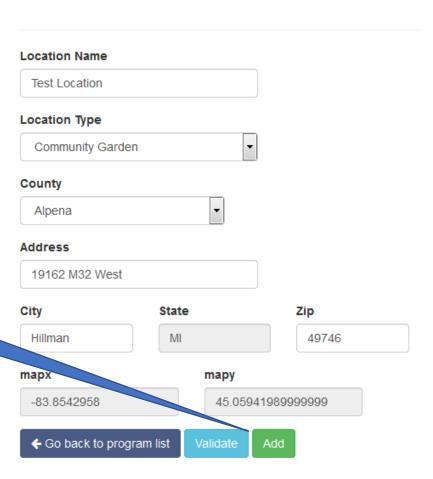
Locations in the database having the same address and location type will appear in red. Nearby Locations O Duplicate(s) Found! Duplicates of a different location type are highlighted in yellov • C Locations having the same address but different location

type will appear in yellow.

**New Location** 

 To complete the process of adding the new location to the database, click the "Add" button.

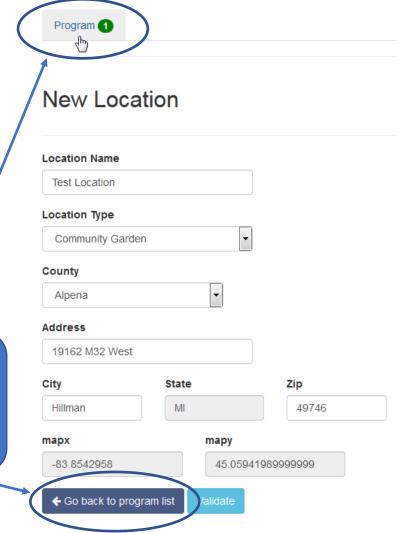
Click the "Add" to add the new location to the database.



## Adding New Locations to the Database

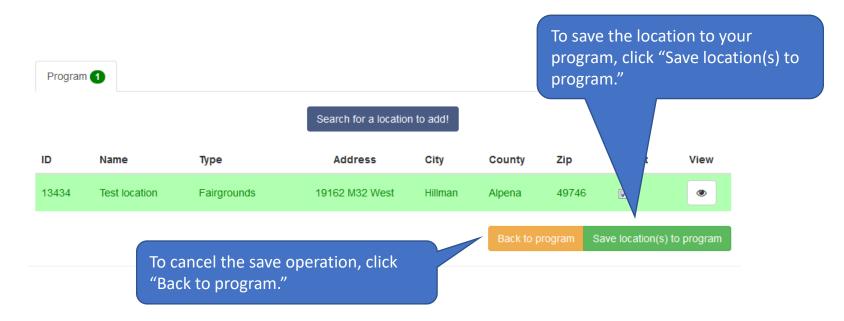
 When you add the location to the database, the location is also added to the list of selected locations for your program. To view the list of selected locations, click either the "Program" link in the upper-left corner or the "Go back to program list" button.

Click the "Program" link or the "Go back to program list" to view the list of selected locations.



## Adding New Locations to the Database

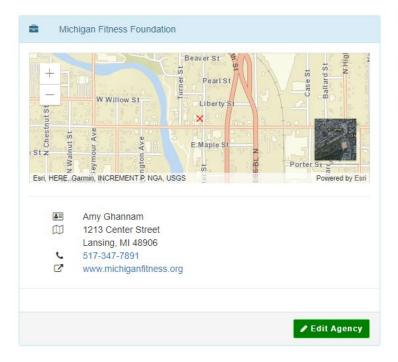
- Your newly-added location appears in the selected locations list.
- To save the new location to your program, click the "Save location(s) to program" button.
- To cancel the save operation, click the "Back to program" button.

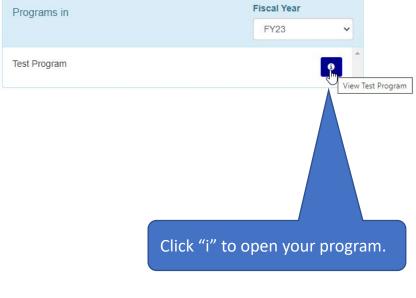


# **Program Sites**

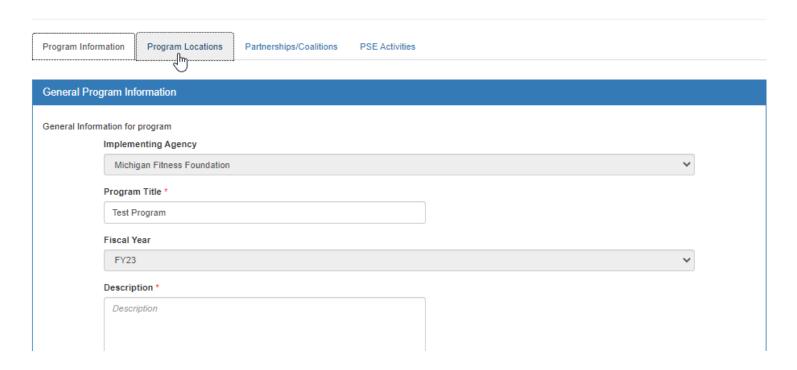
#### **Adding Program Site Information**

- Once you have saved program sites to your program, you will need to add additional program information to each location.
- To begin this process, go to the home page and click the "i" icon for your program.

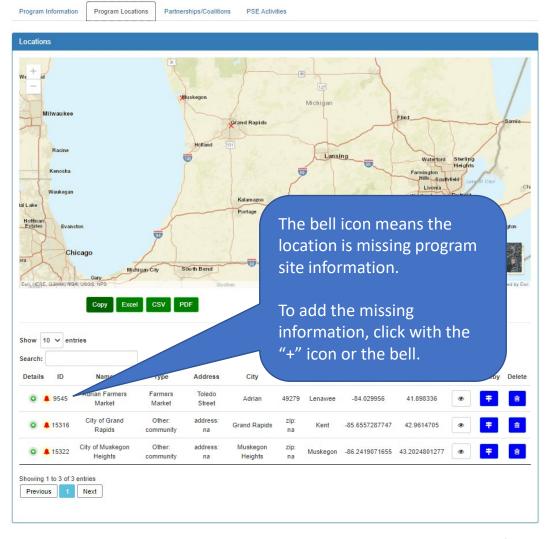




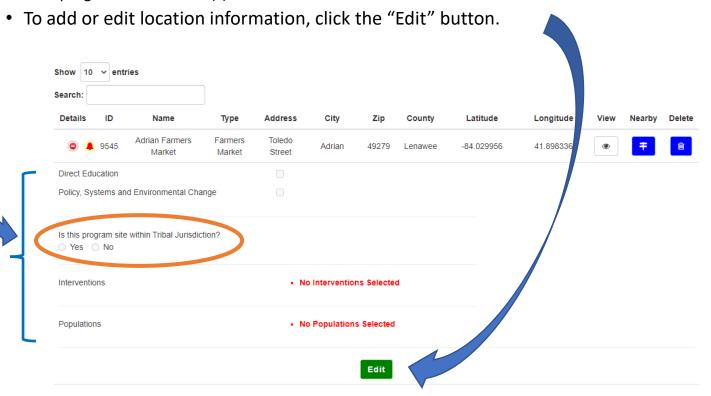
• Then click the "Program Locations" tab.



- The list of locations that have been saved to your program appears.
- The bell icon signifies locations having incomplete program information.
- To expand (open) the program information, either click the "+" icon or the bell.

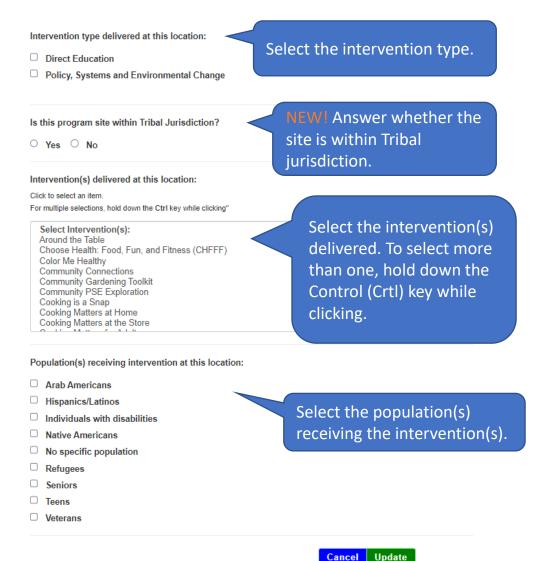


- The program information options appear and include:
  - Type of intervention(s) delivered (Direct Education and/or Policy, Systems and Environmental change)
  - NEW! Tribal Jurisdiction Identify whether or not a program site is within Tribal jurisdiction
  - Interventions the intervention(s) delivered at the location by your program
  - Populations the population(s) receiving your program intervention(s)
  - If the location is a school, a "Grades" option will also appear the grade levels receiving your program intervention(s)



When editing the program site information:

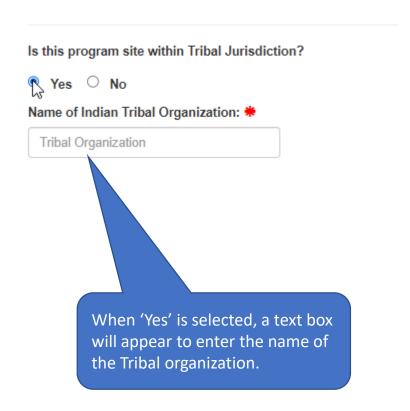
- Select the type of delivery for the intervention, the intervention(s) delivered, and the population(s) receiving the intervention(s).
- NEW! Answer whether the program site is within Tribal jurisdiction.
- If the location is a school, select the grades that receive the intervention(s).



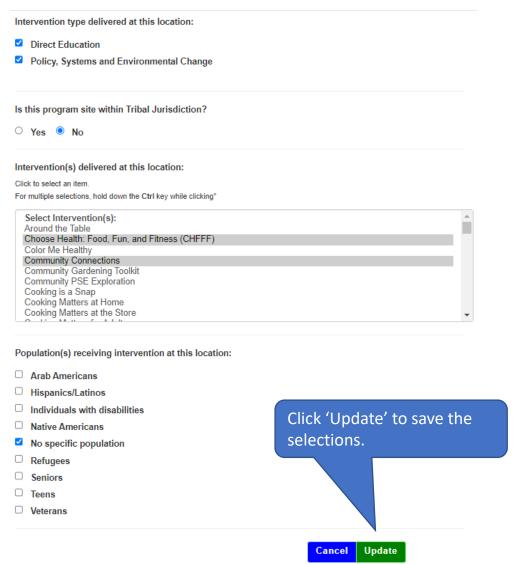
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**NEW!** For the 'Is this program site within Tribal jurisdiction?' item:

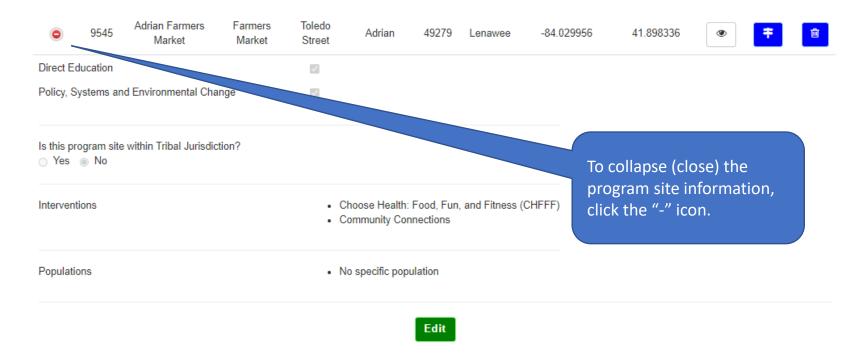
- if 'Yes' is selected, you will be prompted to enter the name of the Tribal organization.
- If 'No' is selected, you will not be asked to enter the name of the Tribal organization.



Click 'Update' to save your selections.



- Your saved selections appear.
- To close the program site information, click on the "-" icon.



- If you completed the missing program site information, the bell icon will not appear for the location.
- Complete the program information for each of the remaining locations in your saved locations list.



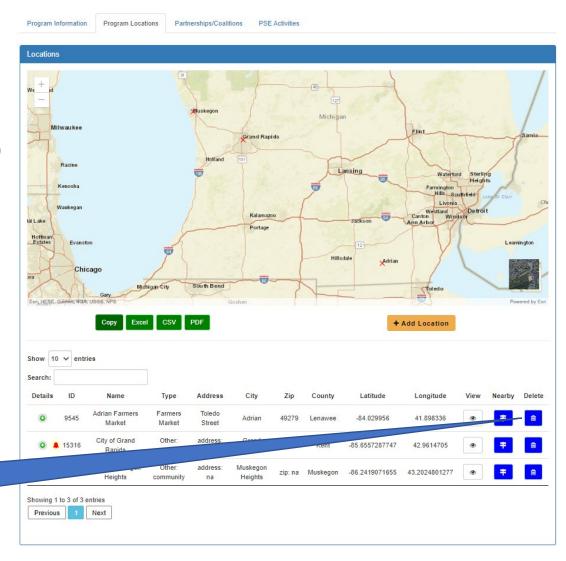
# **Program Sites**

#### **Removing Program Sites**

#### Removing Program Sites

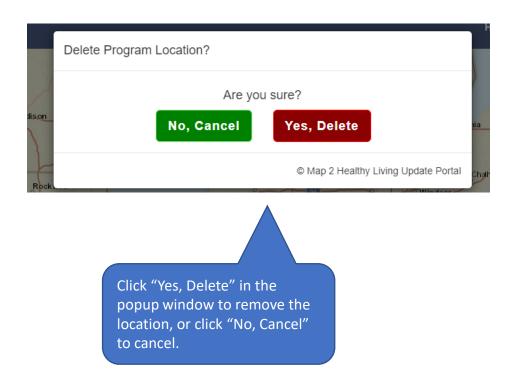
- To remove a location from your program, click the trash (Delete) icon for the location.
- Note: If you have entered PSE Activity data for the program site, you might not be able to remove the site until first deleting the PSE data.

Click the trash can icon for the location to remove it from your program.



#### Removing Program Sites

 When the trash icon is clicked, a popup window will appear asking for confirmation of the deletion. Click "Yes, Delete" to delete, or click "No, Cancel" to cancel.

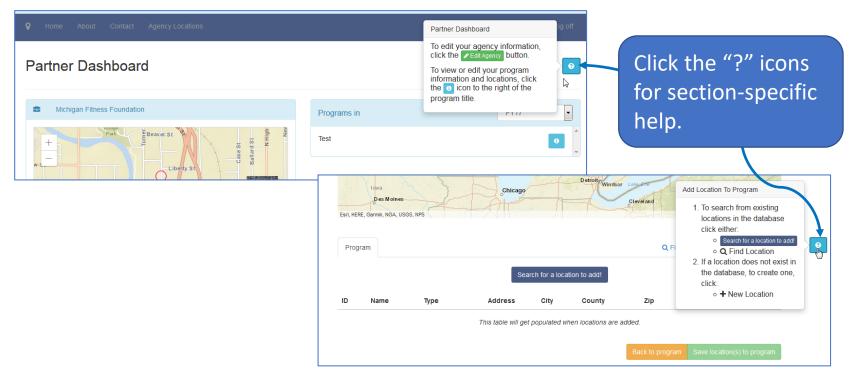


# Help/Support Information

#### Help Information

Help icons are available throughout the site and contain information and instructions specific to the section in which the icon is located. Click the icon to display the information.

To hide the information, click anywhere else on the page.



### Reporting Bugs/Making Support Requests

To report a bug or make a support request:

- Click the "Contact" menu item
- Select the type of message you are sending (general request, reporting a bug, or other)
- Enter your message into the Message text box.
- Click "Send Message."



#### **Technical Questions?**

Contact Michelle LaFleche:

mlafleche@michiganfitness.org

517-908-3864



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