

# *Charitable Goods Distribution*



**City of Birmingham  
Traffic Engineering  
Charitable Goods Distribution Management**

## *User's and Administrator's Guide*



# *Charitable Goods Distribution*

## WHAT DO I DO WHEN....

1. **I WANT TO DISTRIBUTE FOOD TO THE HOMELESS?**
  - a. You must submit an application to the City of Birmingham. (pg. 3)
2. **I NEED TO REAPPLY FOR MY ORGANIZATION’S ACCESS CODE TO THE WEBSITE?**
  - a. Go to website and click on the link “**Apply for an Access Code**”. (pg. 4)
3. **I WANT TO SCHEDULE A DATE AND TIME TO DISTRIBUTE FOOD?**
  - a. Select “**View or Make Reservation**” on website. (pg. 5)
4. **I NEED TO CANCEL A RESERVATION?**
  - a. Select “**Cancel a Reservation**” on website. (pg. 6)
5. **I HAVE A QUESTION OR PROBLEM WITH THE WEBSITE?**
  - a. See “Requesting Help or Information”. (pg. 6)

## AS ADMINISTRATOR, WHAT DO I DO WHEN....

1. **A NEW ORGANIZATION SUBMITS A REQUEST TO DISTRIBUTE CHARITABLE GOODS?**
  - a. You must approve or deny the organization’s request. (pg. 7)
2. **AN ORGANIZATION SUBMITS A REQUEST RE-APPLYING TO DISTRIBUTE CHARITABLE GOODS?**
  - a. You must approve or deny the organization’s request. (pg. 7)
3. **AN ORGANIZATION DOES NOT SHOW OR CLEAN UP THE RESERVED AREA?**
  - a. You will want to create a note on the “Update Request Form” page.. (pg. 7)
4. **I AM ASKED FOR A REPORT ABOUT A SPECIFIC ORGANIZATION OR LOCATION?**
  - a. Select “**Run Ad-hoc Reports**” on website. (pg. 8)
5. **I NEED TO GIVE SOMEONE ACCESS TO MANAGE THE CHARITABLE GOODS SITE?**
  - a. Select “**Add New Users Security**” on website. (pg. 9)
6. **I NEED TO CHANGE SOMEONE’S ACCESS TO MANAGE THE CHARITABLE GOODS SITE?**
  - a. Select “**Update an Existing Users Security**” on website. (pg. 9)
7. **I NEED TO REMOVE SOMEONE’S ACCESS TO MANAGE THE CHARITABLE GOODS SITE?**
  - a. Select “**Update an Existing Users Security**” on website. (pg. 10)



# Charitable Goods Distribution

## APPLYING FOR AN ACCESS CODE

### 1. FROM THE MAIN MENU:

- Select *Apply for an Access Code* on the left side of the screen.
- Read the instructions on the next page and then click the **Next** button.
- Place a check mark in the appropriate box to indicate that you are a new participant of Charitable Foods Distribution and click the *Next* button.

A screenshot of a web form. At the top, there are two radio button options: the first is checked and says 'I am a new customer. I have no Access Code.'; the second is unchecked and says 'I am reapplying and already have an Access Code. My Access Code is:' followed by a text input field. At the bottom right of the form, there is a blue button labeled 'Next' with a mouse cursor hovering over it.

- Fill out the form with your Organization's information as well as the Primary and Secondary applicant's information. The Primary Applicant must put a checkmark in the box below, enter his /her name as a signature, and click *Submit Application*.

A screenshot of the full application form. At the top, there is a red instruction: 'Please make certain all items marked with asterisks are filled in and then select SUBMIT APPLICATION.' Below this is a paragraph of instructions. The form contains several sections: 1) Radio button options for new vs. returning customer. 2) A 'Next' button. 3) Organization information fields: 'Name of Your Organization \*' (Sesame Street), 'Street Address of Your Organization (please include zip) \*' (1234 Way), 'Date of Application' (11/21/2014), and 'Status of Application' (Pending). 4) Two applicant sections: 'Primary Applicant' and 'Alternate Applicant'. Each has fields for 'First Name \*', 'Last Name \*', 'Phone \* (include area code)', and 'Email Address \*'. 5) A checkbox for agreement to terms and conditions. 6) A 'Primary Applicant' signature field with 'Oscar Grouch' entered. 7) A blue 'Submit Application' button.

- Once you submit your application, you will see a notification on the screen.

**Your request has been submitted. You will be contacted by email within five work days.**

**\*\*Please Note: Once you have submitted your request for an Access Code, please provide us with the two specified documents. The documents may be attached and sent by email or may be brought into our office in person. If emailed, please make certain you include your organization's name (not your Access Code) so that we know to whom it belongs. Since the driver's licenses must be in color, we cannot accept a fax.**



# Charitable Goods Distribution

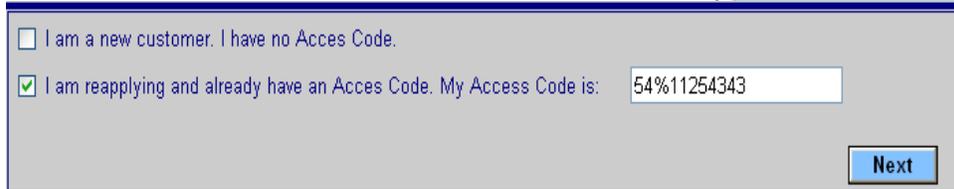
## REAPPLYING FOR AN ACCESS CODE

### 1. FROM THE MAIN MENU:

- Select *Apply for an Access Code* on the left side of the screen.
- Read the instructions on the next page and then click the **Next** button.
- Place a check mark in the appropriate box to indicate that you are an existing participant of Charitable Foods Distribution, enter your Access Code, and click the *Next* button.



[Apply for an Access Code](#)  
[View or Update an Applicants Request](#)  
[View or Make a Reservation](#)  
[Cancel a Reservation](#)  
[Add New Users Security](#)  
[Update An Existing Users Security](#)  
[Run Ad Hoc Reports](#)



I am a new customer. I have no Acces Code.  
 I am reapplying and already have an Acces Code. My Access Code is:   
**Next**

- Update the form with any changes to your Organization's information or the Primary and Secondary applicant's information. The Primary Applicant must put a checkmark in the box below, enter his/her name as a signature, and click *Submit Application*.  
**\*\* (If there are no changes to any of the information, you only need to click *Submit Application*.)**

Please make certain all items marked with asterisks are filled in and then select **SUBMIT APPLICATION**.

In order to reserve sessions, you must have a valid access code. This is used like a PIN for your organization to reserve locations and time slots. Please complete this quick application and, when approved, your access code will be emailed to the addresses you list below.

I am a new customer. I have no Acces Code.  
 I am reapplying and already have an Acces Code. My Access Code is:

**Next**

Name of Your Organization *	Street Address of Your Organization (please include zip) *	Date of Application	Status of Application
Sesame Street	1234 Way	11/21/2014	Pending

Primary Applicant			Alternate Applicant		
First Name *	Last Name *	Phone * (include area code)	First Name *	Last Name *	Phone * (include area code)
Oscar	Grouch	2055551212	Abby	Cadabby	2055552121
E-Mail Address * oscar.grouch@sesamestreet.org (The EMail address you wish us to contact you at)			E-Mail Address * abby.cadabby@sesamestreet.org (The EMail address you wish us to contact you at)		

Upon approval of this application, I agree that I and my officers shall hold harmless the City and its officers and employees, and shall indemnify the City, its officers, employees and agents for any claims for damage to property or injury to persons which may be occasioned by any activity carried on under the terms of this permit.

Primary Applicant

**Submit Application**

- Once you submit your application, you will see a notification on the screen.

**Your request has been submitted. You will be contacted by email within five work days.**

**\*\*Please Note: Once you have submitted your request for an Access Code, please provide us with the two specified documents. The documents may be attached and sent by email or may be brought into our office in person. If emailed, please make certain you include your organization's name (not your Access Code) so that we know to whom it belongs. Since the driver's licenses must be in color, we cannot accept a fax.**



# Charitable Goods Distribution

## MAKING A RESERVATION

### 1. CLICK ON “VIEW OR MAKE A RESERVATION”.

- a. Select the location where you want to distribute food from the drop-down list.

(1) Select a location \* - Select -  
- Select -  
(2) Select a calendar date \* City Hall Pk Lot: SW Corner of 19th St N and Rev Abraham Woods, Jr Blvd N (718 19th St North)  
Municipal Court Pk Lot: NE Corner of 17th St N and Rev Abraham Woods, Jr Blvd N (801 17 St North)  
North Side of Park Place, First Parking Space East of 20th St N (Parking Meter #38)  
North Side of Park Place, First Parking Space West of 20th St N (Parking Meter #37)  
Open Lot on NW Corner of 16th St North and 7th Ave N (700 16th St North)

- b. On the calendar, select the date on which you want to distribute the food.

(2) Select a calendar date \* ≤ November 2014 ≥  
Sun Mon Tue Wed Thu Fri Sat  
26 27 28 29 30 31 1  
2 3 4 5 6 7 8  
9 10 11 12 13 14 15  
16 17 18 19 20 21 22  
23 24 25 26 27 28 29  
30 1 2 3 4 5  
November 28

- c. From the open slots, please enter your Access Code in the slot for the time of day during which you want to distribute the food. (Please note that there is the potential of having two organizations distributing food from the same location at the same time.)

(3) Select a time period \* For fairness, please observe these rules:  
- Your organization must have a reservation-- no "crashing," please.  
- Please reserve only one time slot per time period.  
- Only two organizations may be allowed to reserve any location at once.  
- You may apply only for time periods not already taken.  
- You may not apply for a time period greater than 14 days in the future.  
- To apply, simply enter your ACCESS CODE (not organization name) in the desired time period you wish to reserve and select the SUBMIT button.

	Organization A:	Organization B:
From 7:00 am to 10:00 am	54%11254343 [ ]	
From 10:00 am to 1:00 pm	Chick-Fil-A	
From 1:00 pm to 4:00 pm	Chick-Fil-A	

(To reserve, enter only your ACCESS CODE above-- not your organization's name) (To reserve, enter only your ACCESS CODE above-- not your organization's name)

- d. Click “Submit Request.”

(4) Submit your request \*

## VIEWING RESERVATIONS

### 1. CLICK ON “VIEW OR MAKE A RESERVATION”.

- a. Select the location where you want to distribute food from the drop-down list.

(1) Select a location \* - Select -  
- Select -  
(2) Select a calendar date \* City Hall Pk Lot: SW Corner of 19th St N and Rev Abraham Woods, Jr Blvd N (718 19th St North)  
Municipal Court Pk Lot: NE Corner of 17th St N and Rev Abraham Woods, Jr Blvd N (801 17 St North)  
North Side of Park Place, First Parking Space East of 20th St N (Parking Meter #38)  
North Side of Park Place, First Parking Space West of 20th St N (Parking Meter #37)  
Open Lot on NW Corner of 16th St North and 7th Ave N (700 16th St North)

- b. On the calendar, select the date on which you want to distribute the food.

(2) Select a calendar date \* ≤ November 2014 ≥  
Sun Mon Tue Wed Thu Fri Sat  
26 27 28 29 30 31 1  
2 3 4 5 6 7 8  
9 10 11 12 13 14 15  
16 17 18 19 20 21 22  
23 24 25 26 27 28 29  
30 1 2 3 4 5  
November 28

- c. Reserved slots will show the name of the organization that is planning on distributing food at that time and location.

(3) Select a time period \* For fairness, please observe these rules:  
- Your organization must have a reservation-- no "crashing," please.  
- Please reserve only one time slot per time period.  
- Only two organizations may be allowed to reserve any location at once.  
- You may apply only for time periods not already taken.  
- You may not apply for a time period greater than 14 days in the future.  
- To apply, simply enter your ACCESS CODE (not organization name) in the desired time period you wish to reserve and select the SUBMIT button.

	Organization A:	Organization B:
From 7:00 am to 10:00 am		
From 10:00 am to 1:00 pm	Chick-Fil-A	
From 1:00 pm to 4:00 pm	Chick-Fil-A	

(To reserve, enter only your ACCESS CODE above-- not your organization's name) (To reserve, enter only your ACCESS CODE above-- not your organization's name)



# Charitable Goods Distribution

## CANCELLING A RESERVATION

### 1. CLICK ON “CANCEL A RESERVATION.”

- Enter your organization’s access code and select the location you want to cancel from the drop-down menu.

This screen allows you to cancel reservations your organization cannot keep. We appreciate you cancelling any unwanted reservations as far in advance as possible to make that time slot available to other organizations.

(1) Enter Your Access Code \* 54%11254343

(2) Select the location \* - Select -

(3) Select the calendar date \* 04/14/14

Municipal Court PA Lot, NE Corner of 17th St N and Rev Abraham Woods, Jr Blvd N (801 17 St North)  
North Side of Park Place, First Parking Space East of 20th St N (Parking Meter #6)  
North Side of Park Place, First Parking Space West of 20th St N (Parking Meter #67)  
Open Lot on NW Corner of 16th St North and 7th Ave N (700 16th St North)

Select the location (entry) of the reservation you wish to cancel.

- Select the date you want to cancel on the calendar.
- Click the box beside the timeslot your organization wants to cancel.
- Click the **Submit Request** button.

(3) Select the calendar date \*

< December 2014 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

(4) Now, check the boxes next to any time slots you wish to cancel. You may only c

Organization A:

From 7:00 am to 10:00 am  Chick-Fil-A

From 10:00 am to 1:00 pm

From 1:00 pm to 4:00 pm

(5) Submit your Cancellation \*

**Submit Request**

## REQUESTING HELP OR INFORMATION

### 1. IF YOU USE OUTLOOK FOR YOUR EMAIL:

- Click on the “**Contact Us**” link shown on the website.
- Enter your questions/issues in the body of the email and click send.

### 2. IF YOU USE ANY OTHER EMAIL SERVICE:

- Send an email to [Help.Desk@birninghamal.gov](mailto:Help.Desk@birninghamal.gov)
- In the subject line, please state if you have an issue or question and enter “Charitable Goods Distribution”.
- State your issues/questions in the body of the email and click send.

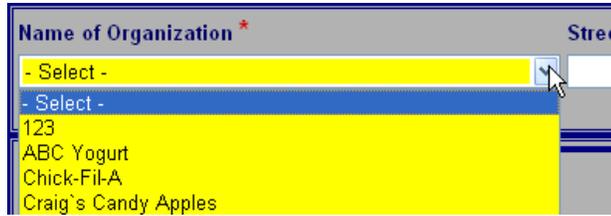


# Charitable Goods Distribution

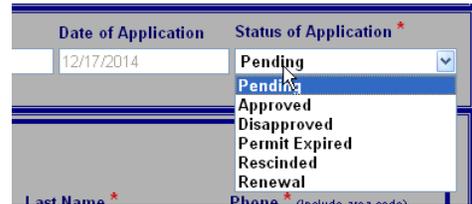
## APPROVING/DENYING APPLICANT REQUESTS

### 1. CLICK ON “VIEW OR UPDATE AND APPLICANT’S REQUEST”.

- Select the organization submitting an application from the “Name or Organization” drop-down menu.



- Once the organization’s information fills in the form, select the appropriate status for the request from the “Status of Application” drop-down menu.



- Click the “Save Updates” button at the bottom of the page.



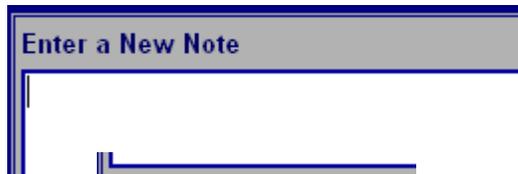
## CREATING “NOTES” ON AN ORGANIZATION

### 1. CLICK ON “VIEW OR UPDATE AND APPLICANT’S REQUEST”.

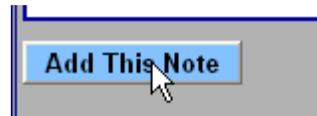
- Select the organization submitting an application from the “Name or Organization” drop-down menu.



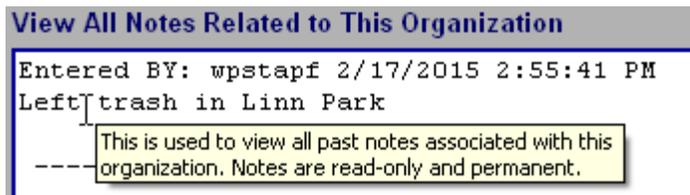
- Scroll down the “Update Request Form” page and click in the blank space under “Enter a New Note”.



- Enter any detailed notes that need to be made about the organization and click “Add this Note”.



- Note will be added to the “View All Notes Related to this Organization” box on the right-hand side of the screen.

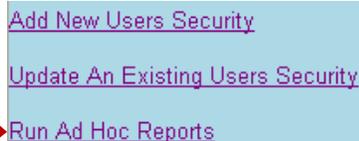


# Charitable Goods Distribution

## APPROVING/DENYING APPLICANT REQUESTS

### 1. FROM THE MAIN MENU:

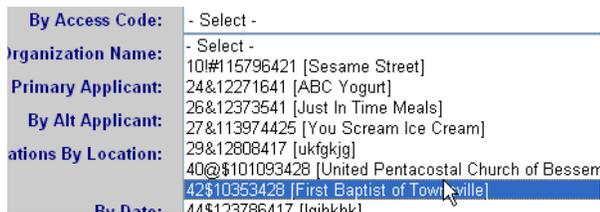
- a. Select *Run Ad-hoc Reports*



Add New Users Security  
Update An Existing Users Security  
**Run Ad Hoc Reports**

### 2. ON THE RUN AD-HOC REPORTS PAGE:

- a. Click the drop-down menu for the type of report you want to run and select the appropriate value.



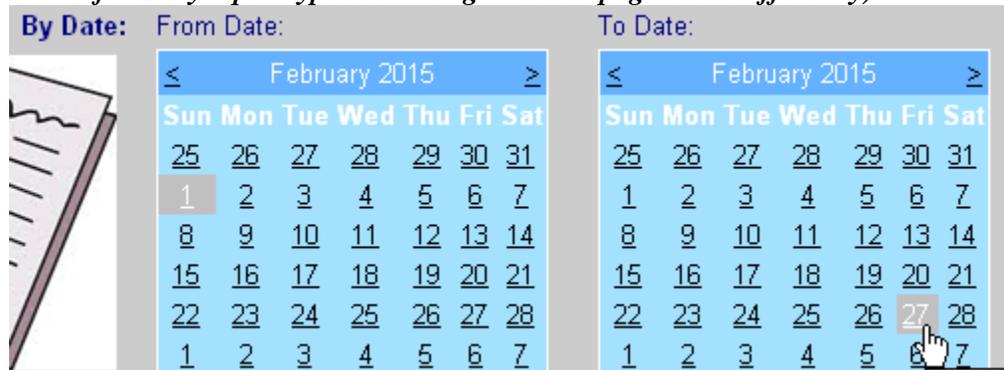
By Access Code: - Select -  
Organization Name: - Select -  
Primary Applicant: 10I#115796421 [Sesame Street]  
By Alt Applicant: 24&12271641 [ABC Yogurt]  
Locations By Location: 26&12373541 [Just In Time Meals]  
By Date: 27&113974425 [You Scream Ice Cream]  
29&12808417 [ukfgkjg]  
40@#101093428 [United Pentacostal Church of Besser  
42\$10353428 [First Baptist of Townsville]  
44&123786417 [leibhkk1]

- b. Click the box beside “Include Notes” if you want to see the notes entered about the organizations.



Include Notes

- c. Select the time period for which you want to run the report by selecting the start date on the “From Date” calendar and the end date on the “To Date” calendar. (*You must do this for every report type even though the web page states differently*)



By Date: From Date: To Date:

February 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

February 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

- d. Click the “Run Report” button to generate report.



Run Report



# Charitable Goods Distribution

## ADDING NEW SECURITY USER

**1. FROM THE MAIN MENU:**

- a. Select *Add New Users Security*



**2. ON THE ADD USER SECURITY PAGE:**

- a. Enter the user's name and user ID

(NOTE: User ID needs to be Windows login ID).

A screenshot of a form with two input fields. The first field is labeled 'Name\*' and contains the text 'William Stapf'. The second field is labeled 'User ID\*' and contains the text 'wpstapf'. A lock icon is visible to the right of the second field.

- b. Enter the user's City of Birmingham email address.

Email Addr:\* william.stapf@birmingh

- c. Select the options to which the user should have access.

A screenshot of a form with three checkboxes: 'Maintain User Security' (unchecked), 'Run Reports' (checked), and 'Administrative User' (checked). A mouse cursor is pointing at the 'Administrative User' checkbox.

- d. Enter any appropriate notes on the user.

A screenshot of a text input field labeled 'Notes:'.

- e. Click Save.

A screenshot of a blue button with the text 'Save' and a mouse cursor pointing at it.

## ADDING NEW SECURITY USER

**1. FROM THE MAIN MENU:**

- a. Select *Update An Existing Users Security*



**2. ON THE MAINTAIN USER SECURITY PAGE:**

- a. Select the user's name from the drop-down menu.

A screenshot of a dropdown menu labeled 'Name: \*'. The menu is open, showing a list of names: 'Alan Foster', 'Barry Lollar', 'Billy Stapf', 'Bud Porter', 'Craig Worth', 'Doug Amison', 'Gary Walker', and 'Huckleberry Hound'. The first option is '- Select -'.

- b. Select/De-Select the options to which the user should have access.

A screenshot of a form with three checkboxes: 'Maintain User Security' (unchecked), 'Run Reports' (checked), and 'Administrative User' (checked).

- c. Enter any appropriate notes on the user.

A screenshot of a text input field labeled 'Notes:'.

- d. Click Save.

A screenshot of a blue button with the text 'Save' and a mouse cursor pointing at it.

# Charitable Goods Distribution

## REMOVING USER SECURITY

1. FROM THE MAIN MENU:
  - a. Select *Update An Existing Users Security*
  
2. ON THE MAINTAIN USER SECURITY PAGE:
  - a. Select the user's name from the drop-down menu.
  
  - b. Click Delete.

