

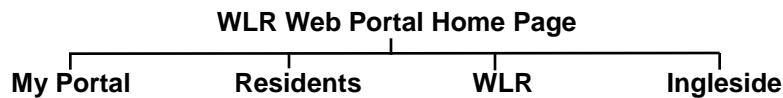
WLR Web Portal Users Manual

Objective: To provide a summary reference for use of the WLR Web Portal (Portal).

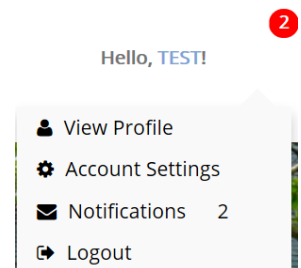
Portal Operation: Although the Director of WLR Resident Services is overall responsible for the Portal, it is intended that as much as possible, residents (led by the IT Committee) will be responsible for its day to day operation and maintenance. It is not expected that all residents will be comfortable in using the Portal. Resident Services and the IT Committee will provide assistance in executing those actions/requests that are available only through the Portal. This assistance will be available in the Computer Learning Information Center (CLIC) in accordance with the announced schedule.

A. Getting to the Portal: You can access the Portal by typing “inglesideliving.org/wlr” in the address bar of your browser and pressing the Enter key. It will take you to the web page that you want (you might have to select Westminster at Lake Ridge as your location). You can then log on to the site using your Username (firstname.lastname) and your Password (the year of your birth). If you have any questions, come by the CLIC. If you don’t have an account, fill out and submit the form in Attachment A – Resident Account Activation Request.

B. How it is Organized: The Portal is organized with a Home Page and category modules as shown:



C. Using the Portal: At the top right of the page you will see “Hello” with your first name and a red circle with a number indicating the number of notifications you have not read. If you scroll your cursor over your name a popup box will appear below your name with four choices:



- View Profile: Your Profile is where you manage the information that you want others to know about you (name, address, phone number, photo, biographical info, etc.). For detailed instructions, see Section D – Resident Account Management.
- Account Settings: Your Account Settings contain your password, Profile, privacy settings and email address.
- Notifications: Actions you have taken.
- Logout

The Home page has three other features:

- Scrolling Banner: The scrolling banner is used for important WLR announcements.
- Announcements Box: The announcements box is used for Portal announcements.
- Mail Status Box: The mail status box indicates if the US Mail has been delivered to the WLR Apartment Building.

You can select a module using the module tabs (e.g. “My Portal”) at the top of the page or the icons (near the bottom). Each of the modules has a responsible Resident and/or Staff Administrator. The modules operate as follows.



1. My Portal: Admin: Resident IT Committee (Paul Kinnecom)

In the My Portal module, you will be able to sign up for events, make reservations, submit Housekeeping and Maintenance Work Orders, etc. You can also see all of your previous submissions/requests and, if desired, cancel any outstanding ones.

The following functions are available in the My Portal module:

- a. My Actions (Resident Admin: Paul Kinnecom) – Records all Resident requests and submissions except Events, Dining and Maintenance/Housekeeping actions.
- b. Events (Staff Admin: TBD, Resident Admin: Mike Swain) - There are two basic types of events – those established and administered by WLR Resident Services and those established and administered by residents. Residents that want to establish an event will be designated as “Event Organizers” and should follow the instructions at Attachment B – Resident Event Organizer’s Instructions. Resident Services will establish its own events.

In the Events function, you will be able to sign up for events and classes. You can go to the “Digital Calendar”, choose the event and then submit the signup request using “Register Now”. Your request will be emailed to the Event Organizer and a copy posted in your “My Events” section. “Register Now” events show number of signups, space available, and who is attending. Users can see what events they are scheduled to attend and cancel attendance at future events at “My Events”.

The following actions are available in the Events function:

- 1) My Events - Records user Events actions.
 - 2) Register Now – Signup for listed events (user will get confirming email).
 - 3) Create Event Form – Request that a planned event be listed for signup. Residents must first reserve the room/equipment (see Attachment B – Resident Event Organizer’s Instructions).
 - 4) Digital Calendar – Shows signup events by month.
- c. Dining (Staff Admin: Kiersten Llewellyn) – You can go to the Dining function to make a dining reservation, place a meal order, submit a dining comment and/or check the status of your Dining Account. Each request/submission is posted in “My Dining”.

The following actions are available in the Dining function (user will get confirming email when making a reservation, ordering a meal and/or submitting a comment):

- 1) My Dining – Records your Dining actions.
 - 2) Dining Reservations – Make a Dining reservation.
 - 3) Order Meals – Order a Take Out or Delivery meal.
 - 4) Dining Comment – Submit a Dining comment.
 - 5) Resident Dining Account – Link to your Dining Account
- d. Submit Away Notice (Staff Admin: Krisna Flores-Romero) – Notify Front Desk of your planned absence.
 - e. Submit Volunteer Hours (Resident Admin: Mary Johnson) – Submit your monthly Volunteer Hours report.

- f. Maintenance/Housekeeping Request (Staff Admin: Ben Rickard): This function allows you to submit a maintenance or housekeeping request
 - 1) My Work Order Requests – Records your Maintenance/Housekeeping Requests and their status (Pending, In Process and Completed).
 - 2) Maintenance/Housekeeping Request – User fills out form and submits a maintenance or housekeeping request. You will get a confirming email. You can check the status of your request in “My Work Order Requests” above.
- g. Comment/Concern (Staff Admin: Michelle Thurston) – Tell WLR about something that pleases or concerns you.
- h. Transport Request (Staff Admin: Krisna Flores-Romero) – Use this form to request car or wheelchair van transportation:
- i. Signup for WLR eNewsletter (Resident Admin: Paul Kinnecom) – Subscribe to the weekly WLR email news.
- k. Help (Resident Admin: Mike Swain) – This function is where to go to get help. The following functions are available in the Help module:
 - 1) User Manual – View/download a PDF copy of the latest WLR Web Portal Users Manual. Watch video on how to edit your profile (Yearbook entry).
 - 2) Contact Webmaster
 - 3) Portal Directories – The Resident and Staff Portal Directories are generated from active Portal accounts. Not all residents and staff have active Portal accounts, See WLR pages for more information.

2. Residents: Admin: Resident IT Committee (Mike Swain)

In the Residents module, you will be able to view resident centric information such as the Yearbook, Resident Association and Resident Committee data in the form of PDF documents that can be searched and downloaded.

You navigate to the page link, then view and/or download the preloaded document(s). The following pages (containing pdfs) are available in the Residents module (some pages may remain empty until the content provider releases applicable documents):

- a. Yearbook – The Yearbook is a PDF document generated from the Resident user account information (except those that opt out using the “Privacy” option).
- b. Resident Assn/Council:
 - 1) Constitution and Bylaws (pdf)
 - 2) Minutes (pdfs)
- c. Committees
 - 1) Committees List (pdf)
 - 2) Development (pdfs)
 - 3) Dining (pdfs)
 - 4) Finance (pdfs)
 - 5) IT/CLIC (pdfs)
 - 6) Health (pdfs)
 - 7) Landscape (pdfs)

- 8) Spiritual Life (pdfs)
- 9) Encore (pdfs)
- 10) Giftshop (pdfs)
- 11) Library (pdfs)
- 12) Quality of Life and Care (pdfs)
- 13) VaCCRA (pdfs)
- 14) Other (pdfs)

3. WLR: Admin: Resident Services Director (Dee Pekruhn)

In the WLR module, you will be able to view information that the WLR Staff deems important to communicate to WLR Residents arranged into pages as shown below. The documents in each page are broken down into the following categories:

- Hours & Services
- Org Chart/Staff List
- Publications
- Memos
- Request Forms
- Presentations
- Other

The following major staff organization pages are available in the WLR module (the responsible page Admin is noted):

- a. Administration* (Admin: Michelle Thurston)
- b. Resident Services (Admin: Krisna Flores-Romero)
- c. Dining Services (Admin: Kiersten Llewellyn)
- d. Plant Operations (Admin: Ben Rickard)
- e. Health Services (Admin: Alex Valladares)
- f. Chaplaincy (Admin: Belva Dickey)

* The Administration Page includes selected documents from the IT, HR, Finance and Sales organizations.

4. Ingleside: Admin: Ingleside CIO (Dusanka Delovska-Trajkova)

In the Ingleside module, you will be able to view information that the Ingleside (and other Corporate entities) Staff deems important to communicate to WLR Residents arranged into pages as shown below. The documents in each page are broken down into the following categories:

- Hours & Services
- Org Chart/Staff List
- Publications
- Memos
- Request Forms
- Presentations
- Other

The following major Ingleside organization pages are available in the Ingleside module (the responsible page Admin is noted):

- a. Corporate (Admin: TBD)
- b. Ingleside Foundation (Admin: TBD)
- c. Ingleside at Home (Admin: TBD)
- d. WING (Admin: TBD)

D. Resident Account Management: There are two types of Web Portal Resident Users accounts, normal and Yearbook. The Yearbook account is for those residents who are listed in the WLR Yearbook but choose not to use the Portal. Yearbook accounts have a dummy email address (firstname.lastname@wlyb.org). This disables proper operation of notification emails. If you have a Yearbook account, you can change it to normal by changing the account email address to your personal email address (see account settings below).

1. **Profile:** Your Profile contains the information you want others to know about you. You can restrict others from seeing this information by using the Privacy setting to “hide” your profile from the Portal Resident Directory and Yearbook (see Account Settings below). Profile information includes:
 - a. Your Photo – Click on the camera image to insert, change or remove your photo. To insert a new (or change) photo, follow the following steps:
 - 1) Locate the photo you want to use on your computer. The photo cannot be larger than 1MB.
 - 2) Go to your account Profile (click on “View Profile” – see **C. Using the Portal** above).
 - 3) Click on the camera image in the photo circle and select “Change Photo”. A “Upload your photo here” popup box will appear.
 - 4) Click on the “Upload” button and a “File Explorer” popup box will appear.
 - 5) Locate your photo on your computer, click on it and then click on the “Open” button. Your photo will appear in the “Change your profile photo” box along with a “crop” box.
 - 6) Move the “crop” box to center your face in the box and the click on the “Apply” button. The box will disappear after the upload/change is completed.
 - 7) Go to the bottom of the page and select “Update Profile”.
 - b. “Tell us a little about yourself...” – A 1500-character text box where you can write your story. Just type in or change your information and click on “Update Profile”.
 - c. Name
 - d. Address
 - e. Phone Number
2. **Account Settings:** Your Account Settings contains your account essential information and your account privacy settings. Select one of the three options below to manage these settings:
 - a. Account – Username (not changeable), First Name, Last Name, E-mail Address.
 - b. Change Password – follow instructions.
 - c. Privacy – select desired settings.

E. Updates:

1. **Portal**: The Portal will be updated on an as needed basis. Future updates being considered include:
 - Integration of the new Wellness Station (Higi)
 - Addition of the new Amazon Echo enhancements
2. **Users Manual**: The Users Manual will also be updated on a more frequent basis, but at least in concert with a Portal update.

Attachments:

- Attachment A – Resident Account Activation Request
- Attachment B – Resident Event Organizer’s Instructions

2/15/18

Attachment A – Resident Account Activation Request

To: Independent Living Residents
From: Dee Pekruhn, Director of Resident Services
RE: The WLR Web Portal

Dear Residents,

To request activation of your WLR Web Portal account(s), fill out and return the form below to the Reception Desk or Resident Services. Because some of your Portal actions will send you an email acknowledging your request/submission, all portal users must provide an individual email address in order to create an account.

If you do not complete and return the filled out form, we will be unable to establish your account.

Enjoy the Portal & See you around the house! ~ Dee Pekruhn, Dir. of Resident Services

WLR WEB PORTAL SIGNUP REQUEST:

Return To: Reception Desk or Resident Services

Resident #1

First Name: _____

Last Name: _____

Email: _____

Resident #2

First Name: _____

Last Name: _____

Email: _____

Attachment B – Resident Event Organizer’s Instructions

These instructions will guide you in organizing and managing a resident event that uses the Web Portal Events sign up process.

1. Establish Your Event:

- a. Reserve the location for your event - Normally this is done at the Front Desk. If you need a special setup, contact the Resident Services Events Coordinator.
- b. Establish the event in the Portal – At least 30 days in advance of your event, sign on to the Portal, go to the Events module and submit a “Create Event Form”. The Portal Resident Event Admin will establish your event and notify you. Individual requests are required for each event in a series.
- c. Advertise your upcoming event – Coordinate with the Resident Services Events Coordinator to publicize your event in the appropriate forums.

2. Manage the Sign up for Your Event:

- a. Attendees sign up for your event – As residents sign up, a copy of the confirming “Register Now” email is sent to you. These emails include the email address of the attendee.
- b. Attendees cancel from your event – If a resident subsequently cancels a registration, you will be sent a notification email.
- c. List of attendees - At the time of any attendance change, you will receive a new list of current event attendees including their email addresses.
- d. Monitor the event signup in the Portal – At any time you can sign on to the Portal, go to the Events module, click on “Register Now” and click on the name of your event to see the number of available spaces and who is attending.

3. Change Your Event:

- a. Change/Delete your event - You can change your event by notifying the Portal Resident Event Admin (reply to the confirmation email you got in Step 1b above). When the event is modified/deleted, an email copy of the event details will be sent to you.
- b. Your event has too many signups - If your event is oversubscribed, you can create an additional occurrence by following this process.

4. Completion of Your Event:

After the scheduled date for your event, the event will be removed from the portal. At any time, you can request a new event by following this process.