

## TECHNICAL INSTRUCTIONS

### YWCA USA 2017 METRICS AND IMPACT REPORT

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As a companion to these technical instructions, you will find a link to the *General Instructions* in the email with the cover memo.

#### STEP 1: LOGGING IN

- Go to this web address, <https://ams.ywca.org/eWeb/>
- Recommendation: bookmark this link so you can easily go back to it in the future.
- Click on the link in the login box that says "Forgot your password?"

Login

Email: someone@example.com

Password:

Remember me  
Uncheck if on a public computer

**Login**

[Forgot your password?](#)  
[Create an account](#)

- You will be prompted for your email address. Be sure to enter the same email address from which you received the memo announcing the National Impact and Metrics Report.
- After a couple of minutes, you should receive an email (pictured below) with your password reset request. Click on the link included in the email.



Dear matt test,

We have received your password request. Please follow the link below to reset your password:  
[click here](#)

If you did not make this request, please [contact us](#) immediately.

Thank you

- Your click will take you to a new page where you can create your new password. Please make note of the password you create, you will need it going forward. Once your password is created, you will be taken back to the login page. Enter your email address and the password you just created and then click the Login button.

Login

Email:

Password:

Remember me  
Uncheck if on a public computer

→

[Forgot your password?](#)  
[Create an account](#)

## STEP 2: SETTING UP ACCESS

- As the ED/CEO of your organization, you should now see this screen. At the start, only the executive director/CEO will have access to the online report form.

The screenshot shows a user profile page. On the left, there's a placeholder for a photo labeled "NO PHOTO". Below it, the address "Takoma Park, AL 20912" and email "zzmpreiss@ywca.org" are listed. There are "Edit Contact Info" and "Edit Primary Info" buttons. The main profile area shows Name: Matt Preiss, Title: IT, Company: YWCA USA. Address: 7140 Carroll, Takoma Park, AL, 20912, UNITED STATES. Buttons for "Add/Edit Bio" and "Edit Demographics" are present. To the right, a sidebar titled "My Account Links" includes "My Full Contact Info" and "Change My Password". Below the profile, a dropdown menu shows "Organizations You Manage".

- Click on the text that says, "Organizations You Manage." This will expand the area and show you your association name. Click on the name.

The screenshot shows the "Organizations You Manage" section. It displays the association name "YWCA USA" in red text, with an orange arrow pointing to it. To the right, the location "Washington, DC 20036-3309" is shown.

- You will now see a dashboard page of your association including sections towards the bottom called "Organization Roster", "Board Roster", "YWCA Service Locations", and "YWCA National Metrics and Impact Report."
- To add members of your staff who will be able to access and enter data on the report, go to the section called Organization Roster and click the black button that says "Add New"

The screenshot shows the "Organization Roster" section. At the top right, there is a black button with a white plus sign and the text "+ Add New".

- Enter the information required for the staff you are adding (see below). The key field used to grant access is "relationship type," the last field in the Personal Information section. Please set to the option called "Report Access"
- You must fill out this form for each staff member who will be accessing and working on the report.

## PERSONAL INFORMATION

Prefix:	Please select
First name:	Jane
	Required
Middle name:	
Last name:	Doe
	Required
Organization:	YWCA USA
Title:	Senior Administrative Assistant
relationship type:	Report Access
	Required

This will trigger an email to the staff member you have added which will provide a link for them to create their password to allow them to login view and/or work on the report as well.

### STEP 3: SETTING UP AND WORKING ON THE REPORT

- Once the appropriate staff members have been added, go back to your organization dashboard page. Scroll down to the last section, called "YWCA National Metrics and Impact Report." Click the "Add New" button to add a new report.

Organization Roster				+ Add New	
Last Name	First Name	Title	Member?		
Mohr	Lucinda	Executive Director/CEO	X	<input checked="" type="button"/> Edit Individual	<input type="button"/> Edit Relation

  

Board Roster						+ Add New	
Name	Member?	Type	Title	Start Date	End Date		

  

Non Board Volunteer Roster						+ Add New	
Name	Member?	Type	Title	Start Date	End Date		
Mohr, Lucinda	X	Executive Director/CEO	Executive Director			<input checked="" type="button"/> Edit Individual <input type="button"/> Edit Relation	

  

YWCA Service Locations					
County	Zip Code	Congressional District			

  

YWCA NATIONAL METRICS AND IMPACT REPORT					
			+ Add New		

- Select the year 2017 from the drop down menu. Then select which staff member will act as the **point person** from your local association to answer any questions regarding the data entered on the report. Click the “**Continue**” button when this is completed.



### YWCA ADD SURVEY

Year:

Please designate a contact in case there are questions regarding your YWCAs Metrics and Impact Report:

- You should now be taken to the YWCA National Metrics and Impact Report homepage.
- You will notice each section has a black background. Clicking a section will take you to the questions in that section.

**YWCA NATIONAL METRICS AND IMPACT REPORT**

The period to be covered by the report is the fiscal year for your YWCA that ended in 2016, or, the most recent 12-month period for which requested data is available.

The report has four sections. All YWCAs need to complete Section 1 and 2, then 4 if need be.

Once the information requested in Sections 1 and 2 is provided, YWCAs move to each part of Section 3 to provide information pertaining to the major programs marked in Section 2.

Year: 2019  
Status: Pending

Contact Person:

**SECTION 1. YWCA OPERATIONS**

Click Here To Enter Location and Property Information	Completed 0%
Click Here To Enter Program Facilities	Completed 0%
Click Here To Enter Promotional Information	Completed 0%
Click Here To Enter Staff and Volunteer Information	Completed 0%
Click Here To Enter Staff and Volunteer Demographics	Completed 0%
Click Here To Enter Financial/Structure Information	Completed 0%

**SECTION 2. SERVICE VOLUME, SERVICE DEMOGRAPHICS, AND MAJOR PROGRAMS OF YOUR YWCA**

Click Here To Enter Service Volume	Completed 0%
Click Here To Enter Service Population Age Demographics	Completed 0%
Click Here To Enter Race/Ethnicity Demographics	Completed 0%
Click Here To Enter Race/Ethnicity Demographics of Service Area	Completed 0%
Click Here To Enter Percentage of Low Income Participants	Completed 0%
Click Here To Enter Major Programs	Completed 0%

- You can now begin filling out the sections of the report and you can assign various sections or report questions to the members that have been assigned permission rights. **NOTE:** You and other staff can access and fill out the report at the same time.
- Completion of Sections 1, 2 and 3 are required of all YWCAs.
- Once a section is complete, the 0% mark will change to 100% and the background will change to green.

[Click Here To Enter Location and Property Information](#)

Completed 100%

- Here is a description of the buttons you will see on each report page.

**Print Page**

– This button, upper right, will allow you to print the current page

**Cancel**

– The Cancel button will take you from the page you are on back to the report homepage. Any information currently entered on *that* page will not be saved when you press cancel.

**Save**

– Pressing Save will save the information you entered on that page and take you back to the report homepage. This is helpful when you are finished answering that page's questions, but have come to a good stopping point or are not ready to answer more questions. **Note:** If a page's questions have a requirement such the total % must equal 100, you will not be able to press the Save button until this requirement is met.

**Save & Continue**

– Similar to Save, this button will save the data entered on the page, but it will take you to the next page in the report instead of the report homepage. Like the Save button, if you have not met a requirement on the current page, you will not be able to save and continue.

- Please read the instructions carefully at the top of each page and for each question. They will remind you of the section you are completing, describe the information needed, and list any special instructions.
- If you are finding the text too small to read, you can enlarge it through your browser: press the "CTRL" button on your keyboard while tapping the "+" button.

- There will be some pages with fields for numbers or percentages. You can move through these fields by pressing the **TAB** button on your keyboard to progress to the next field. Please **do not use the ENTER button** as some browser's functionality will cause you to leave the page and go back to the report homepage.
- An important note about Section 3: Program Details for Each of Your YWCA's Major Programs. You will notice when you first get to the report homepage that this section is blank. Once you complete the area in Section 2 called "Major Programs" which contains checkboxes for the major programs being provided by your YWCA, you will see these areas populated under Section 3. Here is an example:

**SECTION 3. PROGRAM DETAILS FOR EACH OF YOUR YWCA'S MAJOR PROGRAMS**

Click Here To Enter Ongoing and multi-week programs designed to eliminate sexism and increase individual empowerment

Click Here To Enter Ongoing and multi-week programs for women's and/or girls' economic advancement

Click Here To Enter Ongoing and multi-week women's and/or girls' leadership development programs

- Once you complete sections 1, 2, and 3 (Section 4 is optional), you may click the "**Submit**" button on the report homepage. **Please answer all pertinent questions fully and accurately. In all cases, the executive director/CEO should fully review the report before it is submitted.**

**YWCA NATIONAL METRICS AND IMPACT REPORT**

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The report has four sections. All YWCAs need to complete Section 1 and 2, then 4 if need be.

Once the information requested in Sections 1 and 2 is provided, YWCAs move to each part of Section 3 to provide information pertaining to the major programs marked in Section 2.

Year: 2019  
Status: Pending

Contact Person: [Edit](#)

Submit

- At this point, your report will be considered complete and submitted. You will see this now reflected at your organization dashboard.

**YWCA NATIONAL METRICS AND IMPACT REPORT**

Report Year	Report Status	Report Initial Date
2017	Completed	02/07/2017



- Between now and March 24, 2017 you may return to the report and change any of your answers, even if it has been submitted. After March 24, 2017, the report close and you will not have the ability to change your answers. You will, however, be able to view your report past the March 24 date by clicking the “View” button found next to the report on your organization dashboard.