ASNE-TW Wild Apricot Web Site Manager’s Manual

This is a rough draft. Its purpose is to capture lessons we’ve learned through hours of experimenting, tech support calls and emails, and training each other. The finished version will be formatted and organized to be useful to those managing the web site.

**Documents**

* Responsible: Secretary
* Uploading
	1. Log in as a manager
	2. Ensure that you’re in ‘Admin view’ (upper right corner)
	3. Click on the ‘Web site’ menu button (third from the left) and select ‘files’
	4. That will show a long list of files. Ensure that they’re sorted on ‘Date Modified’
	5. Ensure that the file on your system has a meaningful name so that you and other managers will be able to find it in the list
	6. In the file list, scroll to the bottom of the page and click on the Browse button
	7. That will take you to your system, find your file and double-click on it
	8. That will put your file at the top of the list
* Linking to the document in a page
	1. Complete steps 1. And 2., above
	2. Click on the ‘Web site’ button and select ‘Site pages’
	3. Find the page where you want to list the document and click on it to highlight it
	4. Click on the ‘Edit’ button
	5. Click in the list where you want the file link to be until you can type its name there
	6. Type in the document’s title and highlight it
	7. In the upper right, click on the ‘files’ menu choice. That will bring up the list with your document at the top
	8. Double click on your file.
	9. Save the page.
* Restricting access to a document
	1. Find the document you want to restrict and right click on it
	2. Choose ‘Access level’ and select ‘Restricted’
	3. Click in whatever group should see the document from the list to the right (do NOT check the ‘Mass mail’ group
	4. Click ‘Save’

**Membership**

* Responsible: Membership chair
* The membership database is populated by uploading the file from National.
* Caveats:
	+ Several members do not have email addresses. They must be deleted from the file:
		- Records with no email address are added to the list EVERY upload
		- To avoid all those duplicate records, the Excel file from national must be sorted on email address and all those without email addresses deleted.
		- Procedures:
			* Log in and select ‘admin view’ (upper right)
			* Move the cursor over Contacts, select Import
			* That will take you to a page where you can select the Excel file and import those members. It overwrites all those files with matching email addresses.
			* Choose the file and click on Upload

Templates:

* Responsible: web site manager
* There must be a template before a corresponding page can be created. How to create one:

**Event Management**

* View registrants:
	1. Those with **event management** privileges can download the list of registrants
		+ Log in (see the tiny link right below the banner on the home page)
		+ Click on Events, choose Event list
		+ Scroll down and click on the dinner meeting you’re interested in
		+ Click on Registrants and invitees
		+ Click on the Export registrants button
		+ This is the spot where you can customize what you want to get.
			- The first time, you should see that all boxes are checked.
			- Uncheck the Export all fields box AND all that you do NOT want to see
			- In my experience just now, it appears that WA remembers your choices.   I logged out and back in again and they were the same.
			- I leave the Export to set as CSV, manipulate the file to look like I want it and then save that as an Excel file.
			- Click export and follow the directions your operating system version displays.
	2. Those who do not have event management privileges, but are EB members:
		+ Log in
		+ Click on Events, choose Event list
		+ Scroll down and click on the dinner meeting you’re interested in
		+ Right above the Register button, it shows the total registered
		+ Click on that hyperlink to see the list of registrants
* Dinner Meeting creation and management:
	1. Log in and ensure that the Admin view is selected (upper right)
	2. Under Events, select Event List
	3. Click on the last dinner meeting
	4. If it's not in the list, under Range, select This year
	5. Under the Edit button (upper left), select Duplicate event. That shows a copy of the dinner you chose.
	6. Click the Edit button
	7. Change the data to correspond to the dinner meeting you're creating
	8. Visible to (change it to public)
	9. Event title - remove the '(copy) '
	10. Date
	11. Description
* 7. Click on Save
* 8. When it's time to open reservations, do steps 1. And 2., select and edit the next dinner event and click on the Enable registration box 9. Save.
* Log out
* Steps 1 - 7 can be done as soon as the Programs manager knows the details. I recommend that this be done so that visitors can see upcoming events for as far out as the information is available. TBDs for event descriptions are allowed.
* Cancellation of an event:
	1. Do NOT cancel the event and—especially—do not issue refunds, as it costs ASNE-TW money.
	2. Instead, edit the event, change the date to that of the next month’s event. If the speaker and topic information is different, change those, as necessary.
	3. Use the “email registrants” button to send an email to those who have registered for the event being cancelled. Tell them that, if they plan to attend the next month’s meeting, no action is required on their part and, if they cannot attend, to respond, asking that the reservation for the next month’s event be cancelled
	4. For those who ask to have the reservation cancelled, do it: cancel their reservation, delete the invoice and issue a refund. Be sure to log in to PayPal and refund the payments there, too.
* Sending email reminders:
	1. Select Admin View (upper right).
	2. In the Events list, select the desired event.
	3. Select Email Registrants to send an email to all ASNE-TW contacts.
	4. From the templates shown, select the one associated with the desired event. If there is none, select the General Blast Email and edit it to your requirements.
	5. Save your new template.
	6. To send the email to all ASNE-TW contacts, click on the Contacts button and select All Contacts. To send the email to only those who have not already registered, see the procedures, below.
	7. Change the Reply To line, if necessary.
	8. On the Review and Send page, you can send the email immediately or choose a future date. When everything is as desired, click on Send.
	9. \* If you want to send the email to only those who have not already made reservations, you must complete these steps first:
		+ Open the Contacts list
		+ Set up an Advanced Search:
			- Match: All
			- Registered for specific event(s)
			- None of selected
			- Select the event in question
			- Do the Search
			- Save the search with the event name, e. g.,
				* Norfolk Tides event – not registered
		+ Return to step 6, above, Clear all recipients
		+ Click on Contact List and select the name of the search you saved, above.
		+ Review and send.
* **Management privileges**
	1. Log in as manager
	2. Choose Admin view (upper right corner)
	3. Under Contacts, user the Search box to find the member to be granted privileges
	4. Click on the name
	5. Click on the Edit button to the far right, next to Email New Password
	6. Click on Limited administrator and select the role(s) to grant
	7. Save (upper left).