

Pasadena Jaycees Website Administration Cheat Sheet

Some important terms to know:

Index The links on the left-hand side of the website.

Member Index The links below the Index visible ONLY when logged in.

Administration page The web page used for most administration tasks. Found in the member index (if you have permission) with the link 'Administration'. You'll need to login FIRST.

Project vs Event An EVENT is an activity happening at a specific place and time. A PROJECT is either (1) A Pasadena Jaycees activity that occurs over multiple events (like Operation Santa) or (2) A Pasadena Jaycees activity that repeatedly occurs (usually every year). Examples are: An annual ski trip, the A&I, or the Halloween party. Some projects may fit both definitions, like Operation Santa.

Signature Project Any project of high visibility or tradition that is prominently displayed on the home page.

Common Important Tasks

For more information on these or other tasks, consult the Administration Guide online (available in the Resource Center)

Posting an Event

Start from the Administration Page. Click on 'Manage Events' and then 'Create New Event'. Fill in as many fields as you can. Required fields are: Title, Start Date, Start Time, Parent Project (NOTE: there is an option for 'No Project'), Portfolio, EITHER a Chairperson OR a Contact Person (NOTE: Chairperson IF this event needs a committee, otherwise a Contact Person) OR both, a Summary and a Description. Click 'Submit' and the event will be created.

Creating a Project

Start from the Administration Page. Click on 'Manage Projects' and then 'Create New Project'. Fill in as many of the fields as you can. Required fields are: Name, Portfolio, Short Description and Full Description. If this is an annual project, choose an approximate month that it happens in. Try to make the Short Description different from the Full Description. Click 'Submit' and the project will be created.

Editing Web Pages

Many of the website pages can be edited online if you have permission. Start from the Administration Page. Click on 'Manage Web Content'. Select a page from the pull-down menu to edit. Required fields are Title and Page Content. Make your changes here. An image can also be uploaded. Click 'Update' and the page content will be changed.

Changing Member Information

Start from the Administration Page. Click on 'Manage Members'. From the next page you can either search for members to edit, or add a new member to the database. When adding or editing, fill out as many fields as you can. Required fields are marked. When finished click either 'Add Member' or 'Update'.

Handling Membership Applications

Membership Applications submitted online can be managed from the website if you have permission. Start from the Administration Page. Click on 'Manage Membership Applications'. You will see a list of current applicants and their status. Click on the applicant's name to see their application. Update all applicants' status from the pull-down menu and click on 'Update' to make the changes. NOTE: this list displays all applications so if payment is not received within a reasonable time, please delete the application by changing the status to 'Rejected'.

Shortcuts:

My Portfolio VPs will have this link in the Member Index when they log in. This page will show all events and projects related to their portfolio. From here click on 'Status' to see a quick summary of the event or project, 'Edit' to edit the details, and (for events that have passed, at the bottom of the page) 'Revive' will re-create a new event from the details of the old.

My Committee The Chairperson of an Event or Project will see this link in the Member Index when they log in. This page will show a summary of the status for all committees they are responsible for and allow the member to manage the committee and volunteers.

My Events /Event Status The Chairperson and Contact Person for an Event will see this link in the Member Index when they log in. This page will show the status of all Events for this member which are taking RSVPs.

Do's and Don'ts:

To RSVP or not to RSVP Use the RSVP function if you want to create an attendance list for events where this is important. Some events may require a payment to attend and RSVPs work very well for these. Remember that you will have to manage the attendance list if payments are required. DON'T require RSVPs if it's not necessary.

PayPal can be very helpful in collecting payments for events. Most events will use the Treasurer's PayPal account (contact the treasurer for more info) but you can use your own if you prefer. The Event Form will have links to get more information about using PayPal. (PayPal can also process credit cards).

Location, Location, Location Check the location pull-down list for your event location *before* entering anything. If your location does not exist, you will need to enter it in first separately. Also, check through the list thoroughly because it may be there under a different name than you think.

Using images with Events or Projects can help to brighten up and call attention to your event. The Event Form will allow you to upload an image. DO NOT attempt to paste an image into the event description box. It won't work. Images need to be less than 10K in size. Large images can be shrunk with programs like Photoshop.

The importance of a good Summary or Blurb The summary is what will be sent out in the weekly Upcoming Events email blast. A catchy summary will help increase interest in your event. DON'T just copy the description into the Summary box. By taking a extra minute to come up with a few new sentences you will make the event look much more interesting.

Formatting Please take a few minutes to read the Formatting Guide (available in the Resource Center and via the 'Read This First' link on the Event Form). This short document will show you how to make your events look a little better, including: creating Bold text, creating Italic text, creating embedded web links and email links.

DON'Ts

DON'T put contact information in the event description unless you have thought it through. Phone numbers and email addresses can be harvested and used by spammers. Any contact information can be submitted in the assigned fields of the Event Form and will be displayed more securely.

DON'T copy and paste stuff from Microsoft Word or any other word processing program without checking the results. This will often create text that looks quite different on the website. You may have to do a bit of editing to get things looking right.