

Pasadena Jaycees Website Administration Guide 2005

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Section 1 - Definition of Terms

Here is a list of specific terms used in this document and their meanings.

Index	The links shown on every page on the left side of the page.
Member Index	The links shown below the index when a member is logged in.
Home Page	The page that is displayed at www.pasadenajaycees.org . The main page.
Admin Page	The page located at www.pasadenajaycees.org/admin.php . Used for website administration.
Link	Any text or image that causes the browser to load a different page when clicked. Often but not necessarily colored blue .
Event	An occasion or activity that is associated with a specific Time and/or Place.
Project	An occasion or activity that is not associated with a specific Time or Place. Possibly an annual or repeating activity.
Content	The term for certain sections of text on the website that may be edited by an administrator without knowledge of html or web design.

The distinction between Events and Projects: Projects may have Events associated with them. For example, the Halloween Party Project does not have a date or time and is an annual activity, however the 2004 Halloween Party Event does have a date and time and is associated with the Halloween Party Project. Events can be linked to Projects in this way (see Section 5).

Section 2 – Quick Summary

Administration of the website is all handled via the Administration page which is accessible by any board member. You must log in to be able to go to the Admin page. All elements of the website can be found here and are designed to be as simple and straightforward to understand as possible. You can get started right away by looking through the page but be careful not to change or delete anything by accident. A detailed explanation of many features is contained below.

Certain members will also have access to special links in the Member Index called "My Portfolio" and "My Committees" which provide a short cut to many features that they may use often. Please read Section 12, "Special Features", for more explanation.

Section 3 – Administrating News

3.1 News is the term for announcements that show up on the home page. 'News' and 'announcements' may be used interchangeably. **Any** Jaycee member with login privileges may submit news items. Submitted news items are **not** checked for foul language or content and it is therefore the responsibility of every member to use this option appropriately. Members may edit or delete news items that they have submitted. Members with special administrative privileges may edit or delete all news items in the database.

3.2 To submit a new news item:

1. Log in.
2. Click on the link 'Submit News' in the member index.
3. Click 'Submit News Item'
4. Enter the text of the news/announcement in the box provided.

5. Optionally upload an image to be used with the news item. Icons or symbols generally look better than photos. Use Google to search for good images.
6. Click 'Submit' to finish or 'Cancel' to cancel.

3.3 To edit news items:

1. Log in.
2. Click on the link 'Submit News' in the member index.
3. Click 'Edit My News Items'.
4. A listing of available announcements will be displayed. If there are no announcements listed, you are not allowed to edit any of the current announcements.
5. Click 'Edit' to edit the announcement or 'Delete' to delete the announcement.
6. To change the text of the news item, simply make the changes and click 'Update'.
7. To change the image being used, do **not** delete the old image. Just upload a new image and click 'Update'. The old one will be removed.
8. To remove the image completely, check the box marked 'Delete' next to the name of the current image and click 'Update'.

If you do not want to make any changes, click 'Cancel'.

Section 4 – Administrating Events

4.1 Events are managed via the Administration page. To access the Administration page, you must have administration privileges. If the 'Administration' link does not appear in your Member Index, you do not have administration privileges. If the 'Manage Events' link does not appear on the Administration page, you do not have privileges to manage Events. Check with the President to change your privileges.

To manage Events:

1. Log in.
2. Click on the link 'Administration' in the Member Index.
3. Click on the link 'Manage Events'.
4. The 'Manage Events' page will display a search form and links for creating new events.
5. From the 'Manage Events' page you may submit new events and edit or delete old events.

4.2 To submit a new Event, first decide if you will re-submit an old event or create an entirely new event. An old event can be re-submitted with some changes if this will be less work. Before submitting any events, check if the location for the Event has already been entered (Section 4).

There are two location settings available to make things easier, 'To Be Determined' and 'Read Article For Location'. These location choices are available if the event location is unknown or is not a street address. Please do not abuse these choices by using them when not necessary.

Also remember that Events are not verified or approved. Any events you submit will immediately become visible on the website. After you submit an Event you will have the option of sending out an email blast to the Pasadena Jaycees mailing list. If you don't want to send the email blast at this time you can do so also after Editing an event.

To submit an entirely new Event:

1. From the 'Manage Events' page, click 'Submit New Event'.

2. Enter the title of the Event.
3. Select the Event location from the pull-down list of locations.
4. Select the Contact Person for this Event. The contact person does not have to be the project Chairperson. A contact person is not required.
5. Select the starting date and time for the event. Optionally, select the ending date and time.
6. If this Event is associated with a Project, select the associated Project from the pull-down list of Projects. A Project is not required for all events.
7. Select the Portfolio to which this Event belongs. A Portfolio is not required.
8. Optionally upload an image to be used on the website with this event. Icons or symbols generally look better than photos. Use Google to search for good images.
9. Enter a summary of the event for the weekly email blast. A sentence or two is sufficient.
10. Enter the Details of the event. Take the time to read the 'Read Me First' document for some good formatting tips. These formatting tips can be used to enhance the look of the event as well as add web links and mail links. Remember also that you should **not** put the event location or contact information into the Details section if you have entered them already. The location and contact information will be automatically displayed with the event.
11. If this event requires a deposit (such as for a party), enter the amount in the 'Deposit' field. If there is a PayPal account that can accept these deposits, enter the account address. Check with the Treasurer or President if there are any such accounts set up.
12. There are three options you can add to any event by selecting the appropriate check box. 'Needs Committee' should be selected for those events for which you will be accepting volunteers. This is different from 'Ask for RSVP' which is set up for events such as parties where individuals can sign up on a guest list. RSVPs may need to pay a deposit if that has been selected. Finally, 'Members Only' is an option if the event is closed to non-Jaycees. Only Jaycees who are able to log in to the website will be able to RSVP.
13. Click 'Add Event' to finish the submission or 'Cancel' to go back.
14. Finally you are asked if you want to send out an email blast about this event. Click 'Yes' to send or 'No' to skip.

4.3 To re-submit an old Event:

1. From the 'Manage Events' page, click 'Re-submit Old Event'.
2. Select the old Event from the pull-down menu.
3. Click 'Re-submit'.
4. The old event information will be displayed. Edit this information as described above for adding a new event.
5. When finished, click 'Submit' to enter the event or 'Cancel' to go back.
6. Next is the Email Blast option. Click 'Yes' to send or 'No' to skip.

4.4 To edit a previously entered Event you may search by Keyword, Month, Project or Portfolio. Only Events whose date is in the future will be available to edit.

To edit an Event:

1. Search for the Event to Edit.
2. All Events matching your selection will be listed.
3. From the list choose one Event to edit. Select 'Edit' to edit information or 'Delete' to delete event.

4. If editing, the Event information will be displayed. Edit this information as described above for adding a new event. When finished, click 'Update' to enter or 'Cancel' to go back.
5. If deleting, you will be asked to confirm the deletion. Click 'Delete' to delete or 'Cancel' to go back.

Section 5 – Administrating Locations

5.1 Locations are entered separately so they can be stored and re-used if needed. Locations are managed via the Administration page. To access the Administration page, you must have administration privileges. If the 'Administration' link does not appear in your Member Index, you do not have administration privileges. If the 'Manage Projects' link does not appear on the Administration page, you do not have privileges to manage Locations. Check with the President to change your privileges.

To manage Locations:

1. From the Administration page, click 'Manage Locations'

From here you can enter new locations into the database or edit existing locations.

5.2 To add a new Location:

1. Click 'Create New Location'
2. Enter location information. The more information the better.
3. When finished, click 'Add Location' or 'Cancel' to go back.

5.3 To edit an existing Location:

1. Select Location from the pull-down menu. The locations are sorted in alphabetical order.
2. Click 'Edit' to edit Location or 'Delete' to delete Location.
3. If editing, make changes to location information as described in 5.3. When finished, click 'Update' or click 'Cancel' to go back.
4. If deleting you will be asked to confirm the deletion. Click 'Delete' to delete or 'Cancel' to go back.

Section 6 – Administrating Projects

6.1 Projects will be smaller in number than Events and are intended to be used for 'Special' or 'Signature' activities that deserve special attention. Projects will not expire and will always appear on the website until deleted. Projects are assumed to be ongoing or annual activities that will re-occur with regularity.

Projects are managed via the Administration page. To access the Administration page, you must have administration privileges. If the 'Administration' link does not appear in your Member Index, you do not have administration privileges. If the 'Manage Projects' link does not appear on the Administration page, you do not have privileges to manage Projects. Check with the President to change your privileges.

To manage Projects:

1. Log in.
2. Click on the link 'Administration' in the Member Index.
3. Click on the link 'Manage Projects'
4. From the 'Manage Projects' page you may submit new projects and edit or delete old projects.

6.2 To create a new Project:

1. Click 'Submit New Project'
2. On the 'New Project' page that appears, enter the required information.
3. Projects require a Name, a Portfolio, an approximate month, a Short Description and a Full Description.
4. A Chairperson is not required but can be entered if known. Select the Chairperson from the pull-down list of members.
5. Read the 'Read Me First' document at the bottom of the page for ideas on how to enhance your text descriptions, add web links and mail links.
6. The approximate Month is the time of year when this project usually happens.
7. The Short Description is a few sentences that summarize the Project. This is what will be seen when the Project is shown listed with the other Jaycee Projects.
8. The Full Description is meant to be a more extensive and detailed explanation of the Project. Remember that both of these descriptions should be directed at non-Jaycee members that will be browsing the web site.
9. You may optionally upload an image that will be displayed with the Short Description and Full Description text. Icons or symbols generally look better than photos. Use Google to search for good images.
10. When finished click 'Submit' to create the Project or click 'Cancel' to go back.

6.3 To edit a Project

1. Select the Project from the pull-down menu of Projects.
2. Click 'Edit' to edit the Project or 'Delete' to delete the Project.
3. If editing, make changes to project information as described in 6.3. When finished, click 'Update' or click 'Cancel' to go back.
4. If deleting you will be asked to confirm the deletion. Click 'Delete' to delete or 'Cancel' to go back.

Section 7 – Administrating Members

7.1 The website allows administrators full power to manage, add, edit and delete member information as well as perform searches of the member database and print out or download the results of those searches.

Members are managed via the Administration page. To access the Administration page, you must have administration privileges. If the 'Administration' link does not appear in your Member Index, you do not have administration privileges. If the 'Manage Members' link does not appear on the Administration page, you do not have privileges to manage Members. Check with the President to change your privileges.

To manage Members:

1. Log in.
2. Click on the link 'Administration' in the Member Index.
3. Click on the link 'Manage Members'.
4. From the 'Manage Members' page you may perform the actions listed above.

7.2 Adding a New Member

Adding a New Member saves their information into our database and sets them up with a web username and password giving them access to the Member section of the website.

To add a New Member:

1. Click 'Add New Member'
2. Enter as much member information as possible. This information can be edited later. However the member's First Name, Last Name and Username are required. An email address is required for the member to receive their password.
3. When all information has been entered, click 'Add Member' to finish or click 'Cancel' to go back.
4. Member will be emailed their username and password if an email address was provided. (Don't worry if there is no email address. There are other ways to give the member their username and password.)

7.3 Searching the Member database

All other actions require a search of the member database. Searching can be done by first name, last name, member status (current, delinquent, or former), member type (regular, associate, honorary life, etc), payment history, renewal month, or whether they receive a Communique. Any or all combinations of the above are also possible. Also name searches do not have to be complete. (It is possible to search for all members with a last name beginning with 'LE' for example)

Definition of special terms:

Current – means members in good standing with paid dues.

Delinquent – means members who are late with their dues.

Former – means members who are no longer in good standing or paying dues.

Guest – The Member type 'Guest' is used for non-Jaycees or potential Jaycees who are given access a username and password for access to the website for special reasons.

7.4 To search the Member database:

1. Enter the search parameters. (or enter nothing for a complete list of all current members)
2. Click 'Search'
3. The list of all Members fitting the search parameters will be displayed.
4. If you have 'Edit' privileges, you will have the option to either 'Edit' or 'Delete' the Member data. Otherwise you will only have the option to 'View' the Member data.
5. At the bottom of the list you may have options to 'Download' the Member list or see a 'Printer version' of the list which can be printed out.

7.5 Editing Member Data:

1. From the Member list, find the Member you wish to edit and click 'Edit'.

2. Modify the Member information as needed and click 'Update' to enter the changes or 'Cancel' to go back to the Member list. Click 'New Search' to start a new search.

7.6 Deleting a Member

1. From the Member list, find the Member you wish to delete and click 'Delete'.
2. You will be prompted to confirm the deletion. Click 'Delete' to delete or 'Cancel' to go back.

7.7 Downloading Member Data

Member data can be downloaded as a comma-separated file (or .csv file) that can be read by Microsoft Excel and uploaded back into the database. This can be useful for bulk modifications of Member data that would be tedious to be done one Member at a time.

Downloading Member Data:

1. From the Member list, click 'Download' at the bottom of the page.
2. You will be prompted to select from a list of member information to download.
3. After you have made your selections, click 'Download' to download the file or 'Cancel' to go back to the Member list.

7.8 Printing out Member Data:

1. From the Member list, click 'Printer version' at the bottom of the page.
2. A printer-friendly version of the Member list, with a basic minimum of data will be displayed. Select the 'Print' function in your browser to print this out.

Section 8 – Administrating Membership Applications

8.1 Membership applications submitted online are summarized here. This page is a list of all membership applications currently awaiting disposition. The Membership VP or director will be responsible for handling these.

Applications submitted by prospective members initially have the status of "Payment Pending" if the initial membership fee has not yet been received at the Jaycee office or if this fee has not been paid by PayPal. Application status can be set to "Payment Received" if the membership fee is received, "Accepted" if both the membership fee and application are accepted by the board, or "Rejected" if the application is rejected for any reason.

If the application is Accepted, member data is automatically created for the new member and a username and password is generated. The new member also has a welcome email automatically sent to their email address along with instructions on how to log in.

If the application is Rejected, there is no email sent. It is up to the board member to contact Rejected applicants if desired.

Section 9 – Administrating Web Content

9.1 The website allows for most text areas to be edited directly without knowledge of HTML or web design. This provides a flexibility if changes need to be made by the board. The specific areas that currently have this ability are:

1. The 'Welcome' section of the Home page.
2. The 'Who We Are' page.
3. The text part of the 'Membership' page.
4. The text part of the 'Mailing List' page. (Accessed from the Home page)
5. The introductory sections of the 'Community Service' page, the 'Individual Development' page, the 'Social Events' page and the 'Projects' page.

Web Content is managed via the Administration page. To access the Administration page, you must have administration privileges. If the 'Administration' link does not appear in your Member Index, you do not have administration privileges. If the 'Manage Web Content' link does not appear on the Administration page, you do not have privileges to manage Web Content.

See the 'Web Formatting Tips' document (in the [Resource Center](#)) for ideas on how to enhance your Web Content or add web or mail links.

9.2 To manage Web Content:

1. Log in.
2. Click on the link 'Administration' in the Member Index.
3. Click on the link 'Manage Web Content'.
4. From the 'Manage Web Content' page you may edit the content of areas listed above.

9.3 To edit Web Content:

1. Select the name of the page to edit. (Currently pages are listed with a short name. This may change in the future.)
2. Click 'Edit'
3. On the page that appears, you can edit the title of the page that will be displayed and the text that is displayed. There is enough space allocated to write several paragraphs for each page if desired.
4. There may be the option to upload an image in the future. If this is available, it is not required to be set. Images will be displayed alongside the text and you will have the option of putting the image on the left side or the right side of the page.
5. When finished click 'Update' otherwise click 'Cancel' to go back.

Section 12 – Description of Special Features

This section will describe some of the special features and how they may be used.

Automatic mapping of event locations

If the location for an event has been entered into the database, a link to a MapQuest map will automatically be generated in the Event Detail page for easier navigation.

Automatic password reset

If a member forgets their password, they can click on the 'Forgot your password?' link on the Home page and get a new password emailed to them providing they know their username.

Volunteering via Web

1. Any Member may volunteer to chair one of the projects listed on the website. An email will be sent to the VP or board member in charge of that project's portfolio. If the Member is approved, an administrator or board member must use the 'Manage Projects' link to assign the Member volunteer as Chairperson for the Project.

Once that is done, the Chairperson is given privileges to Create New Events and can use the website to contact any Members that volunteer for the Project committee. All further Project volunteer email goes directly to the Chairperson (if they have an email address on file).

2. Any Member may volunteer to be on the committee of an Event that has a Chairperson. The Event Detail page will have a link automatically generated that will notify the Chairperson that they wish to volunteer. When the Chairperson logs in, they can either confirm or deny the Members request. All Members in the committee are listed in one place with emails and phone numbers.

Member Event History Tracking

Members may RSVP to attend events through a link on the Event Detail page. A list of all members that have RSVP'd is also available on that page. This may help Committees or the Board get a better idea of event interest and/or attendance.

Events that a Member has attended are saved and are visible on that Member's profile.

Automatic Email Blasts

Every week the system sends out a summary Email blast to the Pasadena Jaycees mailing list describing the upcoming events of the next three weeks.

Automatic Account Expiration

On the first of the month the system automatically checks for those members who have not paid their dues for the current month and adjusts their status to 'Delinquent'. Delinquent members still have the option of renewing their membership. The system also checks for delinquent members who are more than three months past due and adjusts their status to 'Former'. Former

members can not log in to the website. These adjustments only apply to Regular and Associate members. Honorary Life Members and Past Presidents are not affected.

My Portfolio and My Committees

These are two special links that appear only if a logged in member is either a board member or the chair of a committee. These pages are a short-cut summary of all the events and/or projects that that member is responsible for. From these pages the member can monitor the status of the event or project, edit the event or project, and (when applicable) monitor and communicate with the committee members for the event or project.

Resource Center

This is a page devoted to documents and files that may be useful to general members, committees or board members. Documents can be added very simply if logged in and if the member has the required privileges. Members are encouraged to add documents to this page.

Help Wanted

This page contains advertisements for members who wish to volunteer to help the Jaycees in minor and administrative tasks. This page can be edited from the "Manage Content" Administration page.

Jaycee Store

This page contains items for sale from the Pasadena Jaycees. Administrators who are logged in and have the needed privileges can add or removed items from this list. Items for sale here can be set up to receive PayPal payments.