The My Wellesley Community Instruction Manual
A Step-by-Step Guide
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Getting Started

We are excited to introduce you to the new state-of-the-art, digital Wellesley Community! This new platform offers our users an unprecedented level of connectivity, an easy-to-use interface, flexibility, and independence.

The Wellesley Community is a whole new way of connecting and communicating with each other. It is an integrated solution through which you will be able to communicate with your constituents, manage events and membership, facilitate e-commerce, and foster Wellesley connections. In addition, for the very first time you will have the ability to set what information is public and what information is private.

There are four types of websites being created for the Wellesley Community, and while each is a bit different, the management, interaction and administration is the same:

- Class Website: class websites are geared toward the events classes care most about: Reunion and mini-reunions, and classes can collect class dues through the site (if they so choose).
- Club Website: through club websites, club officers can easily manage membership and plan events.
- Shared Interest Group (SIG) Website: through SIG websites, SIG officers can easily manage membership and plan events.
- The Wellesley Community (Coming soon!): this personalized page is customized for each individual user. It aggregates information from each class, club, or SIG the individual belongs to, all in one place.

You can update the site by yourself. We picked this system with our volunteers in mind. Changing photos, adding news items, sending targeted email blasts, handling memberships, and collecting revenue will all be in your control.
About This Guide

This guide is intended to introduce you to the basic format and function of your site. In addition to this guide, the Alumnae Association will be conducting webinars to help you get up and running on the Wellesley Community quickly and painlessly.

One of the benefits of the Wellesley Community is that it is dynamic—it is constantly changing and evolving to meet our alumnae’s needs. As you explore your new site, you’ll notice some features and tools that are not mentioned in this guide. That is because these features and tools are not yet available, but will be in the future. The instructions included in this guide are intended to show you all the features you have access to during our initial launch. Future revisions of your site will include expanded functionality.

The system is easy to use and the WCAA will be here to offer our training and support throughout the transition and after the launch.

Let’s get started!
A Note about Privacy

The privacy of your confidential Class, Club, or SIG information is a priority of the Wellesley Community. Privacy is defined as the ability to limit access to content based on some criteria. On your website, different areas and features can be restricted based on user groups (members, non-members, guests, etc.). By default, most of the items on your website are public. However, as an administrator, you can turn privacy settings on.

Privacy Settings

The two main privacy settings included in the Wellesley Community are:

1. Public: Anyone can see all the information.
2. Public/Private: Anyone can see the headline, but would need to log in and be of the appropriate group/membership level to see the detail.

- Alumnae Directory: Defaults to private. This cannot be changed.
- Generic Articles: Defaults to public. Can be changed to public/private at the article level.*
- Event Articles: Defaults to public. Can be changed to public/private at the article level.*
- News Articles: Defaults to public. Can be changed to public/private at the article level.*
- Forums: Defaults to private. This cannot be changed.
- Photo Albums: Defaults to private. This cannot be changed. However, on the homepage Photo Album pod and Photo Albums page, the photo album title and the last photo in the album will always be seen publicly.
- Store Items/Event Tickets: The privacy settings are set by the user when the store item/event ticket is set up. (See the section on "Setting Up a Paid Event Ticket" on page 16 for instructions on restricting purchase to certain groups.)

*See the section on "Restricting an Article" on page 13 for how to restrict your generic, event, or news article.
Home Page Overview


To the left is an example of a Class’s main homepage layout. Whether you are managing a Class, Club or SIG, the organization, format and administration of the website is very similar. The key elements have been called out in red.

Beginning from the top to the bottom, the page banner consists of your logo (left), the title of your website (center), the WCAA logo (right), the main navigation, and your banner image. If you want to change your banner image or add/delete a main navigation item, you can request it through Support Tracker. We will talk about how to put in a request in “Support Tracker” on page 37.

Below the page banner is the homepage content. As you can see, your content is laid out in a three-column format:

- **Column 1**: For classes with reunions scheduled within the next two years, a Reunion Countdown, followed by a list of upcoming events. For Clubs and SIGs, a list of your upcoming events. To view additional events, visit the Events page.
- **Column 2**: Lists brief descriptions of any new news items you’ve published recently, in order by event date and article ID. To view additional news, visit the Latest News page.
- **Column 3**: Shows your latest photo albums, listed in the order in which they were created (from newest to oldest). To view additional photo albums, visit the Photo Albums page. Also includes the directory search function (specific to your group), and links to your social media. You can edit which social media are linked in that area.
The website page footer contains helpful links to various Wellesley College pages, along with a space for any WCAA News items. Neither of these areas can be changed.

**Getting Started Managing Your Site**

**Logging In**

1. It is strongly recommended that you access your site using the Mozilla Firefox web browser. While you may access your site in Google Chrome, Internet Explorer, and other browsers, certain functions of your site only work in Firefox. To download this free browser, visit [https://www.mozilla.org/en-US/firefox/new/](https://www.mozilla.org/en-US/firefox/new/).

2. Hover over Login in the main navigation and a drop down of options will appear. As an alumna, you should click the Alum Login option.

3. Enter your Wellesley Login username and password.

4. If you have forgotten your Wellesley Login username or password, you must contact the Wellesley College Help Desk at helpdesk@wellesley.edu or 781.283.3333. They can provide your username or reset your password for you. They are open between 8:30 AM and 4:30 PM EST Monday through Friday.

5. Also note that the default timeout time for each login session is 3 hours. (So, after 3 hours of inactivity, you will have to log in again.)

**Making Edits to Your Site**

After you’ve logged in to your site, access Administrative functions by clicking the blue dot to the left of your name in the main navigation brings up most of the options you will ever need to use.
Article Basics (News, Events, or Mini Reunions)


Article Editor Overview

The article editor is used whenever you want to create a new article or simply edit an existing one. Below is an overview of the article editor interface.

1. To begin, click on the blue dot in the home page main navigation. A drop down menu will appear. From the drop down menu, click “Submit Article.”

2. The article editor is split into four distinct sections: the toolbar, the collection information, the content section, and the article details section. Let’s look at the toolbar first.

3. The toolbar contains everything you need to create visually appealing content. When you are in the article editor, the toolbar is accessed by clicking the little black semi-circle in the top left-hand corner of your page. Clicking the semi-circle releases a menu of formatting options for your article. When expanded, the toolbar consists of four sections. From top to bottom, the three you will be using are: your keyboard tools, your photo vault, the photo uploader. You can drag and drop any text element from the keyboard tools (such as a headline, paragraph, text block, or list block) into your article. If you click the little image icon in the black bar, the toolbar refreshes and you can now see all the pictures you have in your vault—which you can also drag and drop into your article. Using the photo uploader, you can upload a photo to your photo vault directly from the article editor.

4. The second of the four sections in the article editor is the collection information. It is at the very top of the article editor, directly under the main navigation bar. This area feeds to an article collection only—the types of article collections you have on your site are news and events. So,
if your article is a news item or event, it's important to include a headline, sub-head, and article thumbnail in this section. These will be what feed to your homepage under Latest News and Events—they are not considered part of your article. Think of the collection information as a preview or teaser about your article.

5. The third of the four sections is the **content section**. This is where the text and images you want to include in your article will be entered. You can drag and drop text blocks, headlines, other content types, and images directly from the toolbar (discussed in Step 3) into the area between the two gray bars labeled “Begin Content” and “End Content.” As you add text and images here, the section expands to fit it all.

6. If you click anywhere between the two gray bars, a text formatting box will appear. This box gives you many of the traditional text editing tools you will be familiar with: bold, italics, underline, font size, font color, justification, hyperlinks, insert table, and many more. (It even comes with a set of emoticons!) Please note: To create a break between two paragraphs, hit Shift + Return/Enter twice on your keyboard. Only hitting Return/Enter does not create a paragraph break in the text editor.

7. Two of the most important areas of the text formatting box are the paste tools and the template tool. (They are zoomed in on and circled in red at left.) The three paste tools are called “Paste,” “Paste as Plain Text,” and “Paste from Word.” We recommend using Paste from Word if you’re copying content from a Microsoft Word document, and using Paste as Plain Text for all other instances. (Otherwise, you may get strange formatting that Microsoft Word embeds in documents without your knowing.) The template tool opens up a set of fully assembled content templates you can drag and drop into the content area. That way, all you have to do is replace the dummy text with your own, and your article is good to go! (The template tool is a little easier than assembling your article piece by piece via the toolbar we discussed in Step 3.)

8. The final (fourth section) of the article editor is the **article details** section. There are six areas in this section, but only four of these areas
are active: topic, visibility, location, and event parameters. Later, when new releases of the system are implemented, the remaining two areas, keyword tags and group tags, will be activated.

9. Choosing a topic from the drop-down list determines WHERE on the site your article will appear. For example, if you want the item to appear in home page column 2 under Latest News, choose News. This also adds it to the News page, accessed through the News link on the navigation bar. You may have an item appear in up to three locations on your site by setting Topic 2 and Topic 3.

10. The date you enter in the Visibility area is the date on which your article will expire. When an article expires, it is archived, and will no longer appear on your site. Note that the default date is five years from today.

11. Event Parameters are only applicable to event articles (so, you don’t need to add an event start and end date to your news articles).

12. Add a location if you wish to have a Google map of your event appear in your event article. (You must activate the map widget to complete this step; see Step 4 in the following section on Creating a New Article for detailed instructions.)
Creating a New Article

Before you create a new article for the first time, familiarize yourself with the article editor interface, discussed in detail in the previous section of this guide. There is also a detailed instructional video that illustrates the steps outlined below. It can be found at: http://www.alum.wellesley.edu/magnet.help.html?resource=327.

1. To begin, click on the blue dot in the home page main navigation. In the drop down menu, click “Manage Articles.” From the Manage Articles dashboard, choose “Create Article” in the top right corner.

2. If your article is a news or event article, enter the collection information at the top, including a headline, sub-head, and collection image. You can drag and drop an image into the article thumbnail area directly from your toolbar vault.

3. To enter your content, start with one of the predesigned templates, found in the text formatting box (see Step 7 in the previous section of this guide). In the example to the left, “Columns: 4/8 (left-side column structure)” was selected. Replace the dummy text provided in the template with the text you want to include in your article. If there are additional elements you’d like to add from the toolbar (for example, a second headline, or a list block), you can drag and drop those elements into the content section as well. To replace the template image, drag and drop your new image from your vault next to the template image, then simply delete the template image.

4. If creating an event, one of the elements in the toolbar that is especially useful is the Event Dashboard widget. The dashboard will include a summary of your event date, time, and location, plus an interactive Google map for your readers to access directions. To add the Event Dashboard widget, open the toolbar, choose the keyboard tools, and scroll all the way down until you see the Event Dashboard widget. Click and drag the widget into your article where you want it to appear.
5. Fill out the additional details section, including your topic (usually News or Events), visibility, and event parameters (if your article is an event), which include date, time, and location. Note: If you leave the topic as Generic, when published, it won’t appear anywhere on your site. It will be visible only if someone is given the direct URL of the article, or if someone has privileges to view the Manage Articles interface. Location is required for the Event Dashboard widget, discussed in step 4, to function properly.

6. Once you’ve entered all information, click “Publish!” Publishing your article means it can be seen on your website, in accordance with the privacy settings. If you want to save your article and come back to it later for further edits before making it public, you can do so by publishing the article as a “Generic” topic, as mentioned in step 5. Once you’re ready for it to appear publicly, next time you publish it, change the topic to either news or event.

Making Changes to an Existing Article

To make changes to an existing (already published) article, you can open the article editor in two different ways. You either click the blue Admin button, choose “Manage Articles,” then find the article you wish to change, or you can open it straight from the article (if you know where it is on your site). There is a small green pencil icon in the bottom right corner (circled in red; see left) of every page. If you click that, the article editor opens for that article.

Once you are in the article editor, make your changes, and the scroll down to the bottom of the page. Click “Publish.”

Note: The articles that make up the main navigation menu, such as President’s Message, Officer’s List, etc., are assigned as topic “Generic.” Leave the topic as is if you are making edits to any of those pages. The Alumnae Association preloaded these Generic articles to your website.
Restricting an Article

In this section, we will describe how to restrict a generic, news, or event article so that only certain users that you designate can view your article. With the action of restricting an article, you are adding a roadblock for anyone who is not logged in to your site with the appropriate credentials.

Keep in mind: For news or event articles, when you add restriction to the article it will not prevent the article thumbnail, headline, or subhead from appearing on your homepage. So if you have information you want to keep private in any of those fields, make sure to not include it there.

1. To begin, after you create your article, go to the blue admin button in the top left hand corner of your main navigation, and choose “Manage Articles.”

2. You are then brought to your Article Repository. Find the article you already created, and click the gear icon on the far right. Choose “Restrict.”

3. On the Restrict Article page, you can restrict access to your article in two ways: by membership or by group. Membership restriction will likely be most useful for Clubs (for example, you can restrict the article so that only paid members can read it—if you are hosting a member-only event, that might be something you would like to do).

4. All Classes, Clubs, and SIGs can use the following group restrictions:
   - All alumnae: Group code 1001
   - Parents: Group code 1002*
   - Students: Group code 1003*
   - Guests: Group code 1004 (includes everyone else other than students, parents, and alumnae)
   - Honored guests: Group code 1005 (includes “college affiliates,” e.g. faculty, staff, people who were here on a college exchange program, etc.)

*These groups are created, but not yet filled. Do not use these
5. When you are finished entering your membership and/or group-based restrictions, click the blue button “Restrict Article.” You are returned to your Article Repository and shown a message that says your article is now restricted.

6. Now, when a user you’ve excluded based on their membership level or group tries to view your article, they will be shown a restriction notice. Please note: The subhead you applied to the article will appear on the restriction notice.

If you want to restrict your article to only alumnae, type 1001 in the box under group-based restrictions. If you want to restrict your article by only those who are logged in users of your site, enter all five codes (separated by commas) and only users who are logged in will see your article.
Linking to a Document within an Article

Documents can be linked directly to articles. For example, for a club board meeting, you might want to link an agenda to the Event that attendees can review and print out in advance.

1. To begin, the document you want to include as a link in your article should already be uploaded to your site. If you haven’t done that step, see "Adding an Image or File to Your Site" on page 21 for instructions on how to do so.

2. From the blue Admin button, click “Manage Files and Images.” A list of the files and images stored in your vault displays. Scroll down to the file you wish to link, and click the blue information box.

3. On the next page, there will be a “File Info” section at the bottom, which includes an “Absolute URL” and a coinciding hyperlink. Hyperlinks are coded website language that contains information about the location and filename of the files in your vault. You will need to copy the hyperlink into your article so the article knows where to find the linked file. This is a two-step process. Step one is to copy the hyperlink, and step two is to paste the link into the article. To begin, highlight the one under “Direct Link” and copy the URL.

4. Next, open the article editor for the article in which you wish to add the link.

5. In the content section, highlight the text you want to use as the hyperlink. While the text is still highlighted, in the text formatting box click the “Link” button.

6. A dialog box will appear. Paste the document URL you copied earlier into the URL field. In the Target tab field, our preference is for you to change it to “New Window (_blank).” Click “OK.”
The following videos outline the steps for creating event tickets:
http://www.alum.wellesley.edu/magnet.help.html?resource=151
http://www.alum.wellesley.edu/magnet.help.html?resource=152
http://www.alum.wellesley.edu/magnet.help.html?resource=153
http://www.alum.wellesley.edu/magnet.help.html?resource=154

Creating an Event

To create an Event, you should follow the same instructions for creating a new article in "Creating a New Article" on page 11 of this guide.

Setting Up a Paid Event Ticket

An event ticket is used for ticketed, not free events you host for your Class, Club, or SIG. (For example, if you are hosting a faculty speaker event for your club, and you want to sell tickets to the event.)

Once you have created your event article, you can then create the event ticket that corresponds to that event. Your event ticket can then be purchased. It’s necessary to create the event article first, then the event ticket, because you will need to link the ticket to the event using the event article ID #. Your article ID # can be found in the Manage Articles tool.

1. Start by clicking the blue dot in the main navigation, then choose “Manage Store.” On the next page, click the “Manage Items” tab.

2. From the Manage Items tab, click the blue + icon in the top right corner.

3. Each time you add a new store item, it is given a unique Sku#. The Sku# acts as a unique identifier for the item on your website. On this screen you should give your item a name and brief description. Leave display format as “Standard Layout.”

4. Next, you will fill in the item attributes section. For type, you will want to choose Event Ticket. That will make it so that RSVP information is automatically requested from the purchaser. Then enter your price (you must include two places after the decimal, e.g. 20.00), and change the status to Active. (If it were inactive, it wouldn’t be available on the site for purchase.) Leave “Visible in Store” checked if you want the ticket to be sold in your store.

5. The rank field is needed if you are selling different types of tickets for a
single event, such as a member ticket and a non-member ticket. The rank puts the different tickets in order. If it is the only ticket for your event, leave the rank as 1.

6. Next, in the Linked Event field, enter the event article ID that corresponds to this event. In the Qty limit field, you can add a total number of tickets that can be sold for this event. You can also define the maximum number of tickets each user can purchase in the Max per user field.

7. In the Availability Date section, enter the date you want tickets to go on sale along with the date you want tickets to no longer be available for purchase. You can also enter a time that the ticket purchasing period opens and expires.

8. You can leave “Requires shipping” unchecked unless you are printing and mailing a ticket. The Aux Sku, Size, and Color fields below that are usually only used when you are creating a General store item (e.g. merchandise).

9. For the “In Categories” section, choose “Event Tickets.”

10. The last attribute in this section has to do with purchase restrictions. You can restrict purchase to only people who have purchased certain membership levels through your site. (This will come in handy if you are selling member and non-member tickets.) Leave them all unchecked if there are no restrictions on your ticket, and anyone can purchase them.
11. The next optional step is to assign an image (up to 4) for the ticket. Note that the recommended size for store item images is 800 x 800 pixels. If you do a smaller size, it may not fit well on your home page store.

12. Click Save Changes.

13. If you checked “Visible in Store” in Step 4, your ticket will show up automatically on your store page under the category “Event Tickets.” (If you were creating a “comp” ticket that is only available for certain people, you would have unchecked “Visible in Store,” and it wouldn’t appear there.)

14. To create another ticket based on the ticket you just created, you can simply duplicate it. Watch this video to see how: [alum.wellesley.edu/magnet.help.html?resource=154](http://alum.wellesley.edu/magnet.help.html?resource=154) (2:14).

**Adding a Buy Button to Your Event Article**

1. To have your ticket appear with your Event article, there is one last step. Go to the blue button in your homepage navigation, and choose Manage Events. You will see a list of all your events. Find the event that corresponds to your ticket, and click the gear icon in the Action column.

2. Choose “Add ‘Buy Tickets Here’ Link to Article.” You will be asked to confirm if you want to add the link; click “Do it!”

3. You will now be brought to your updated event article, where you can see the link that was added for your ticket. You can copy or move this link to another location in your article if you open the article editor.
Setting Up an RSVP List for a Free Event

For free events, you do not have to create a $0.00 event ticket. Instead, there's a handy widget that you can drop directly into your article which allows your guests to RSVP without going through a purchasing process. In order for this feature to work, you must already have included the MagnetWidget: Event Dashboard to your event article. See "Creating a New Article" on page 11, steps 4 through 6, for instructions on how to add the Event Dashboard.

1. Click the blue admin button from the main navigation bar, then choose Manage Events.
2. Choose your event from the list and click the blue gear icon to the right, then “View.”
3. Next, go to QuickRSVP/Waitlist Control: Disabled [ edit ], and choose “Edit.”
4. This brings you to Additional Event Settings. There are three options to choose from: You can set the maximum capacity for your event, activate a “Look Who’s Coming” list after a certain number of people have RSVP’d, and activate the Quick RSVP/Waitlist feature.
5. Choose QuickRSVP “Enabled” to have the RSVP widget added to your event. The other two settings (maximum capacity and “look who’s coming list”) are optional.
6. Click Save.
7. If you then visit your published event article, you will see that an RSVP widget is now available to be filled out.
Accessing an Attendee List for an Event

Whether your event is a paid event or a free event, you can download an Excel spreadsheet of your attendees. (With a free event, you must add the “Quick RSVP” widget to your event in order to collect attendee names. See the previous section of this guide for instructions.)

1. Click the blue admin button from the main navigation bar, then choose Manage Events.
2. Choose your event from the list and click the blue gear icon to the right, then “View.”
3. On the next page, there will be a section titled “RSVP List.” There, click the link in the sentence “Click here to download the Extended List of Attendees directly to Excel.”

Creating a Waitlist for an Event

1. Click the blue admin button from the main navigation bar, then choose Manage Events.
2. Choose your event from the list and click the blue gear icon to the right, then “View.”
3. At the top of the next page, there is a feature that says “QuickRSVP/Waitlist Control.” Click edit.
4. In the Additional Event Settings page, first set the maximum capacity of tickets for the event. Once the number you enter here has been reached, any additional guests will be waitlisted.
5. Next, toggle the QuickRSVP/Waitlist feature to “Waitlist Enabled.” Then click “Save New Settings.”

Now you will be able to view and download an Excel report of any waitlisted guests. Follow steps 1 - 2 above, and scroll down to the Waitlist section to download the report.

Downloading an Event Order Report

To download a report that summarizes how many tickets you sold for a particular event, follow the steps for “Accessing an Attendee List for an Event” above.
Files and Images

In your website, you have the ability to upload and save images or files (such as PDFs) to be used in other parts of your website, such as events, news, or photo albums. Follow the steps below to add a new image or file to your site. Files and images are stored in your “vault.”

Adding an Image or File to Your Site

1. Click the blue dot in the home page main navigation. A drop down menu will appear. In the menu, click “Manage Files and Images.”

2. From the Manage Files and Images dashboard, click “Upload Files.”

3. As you’ll see on the Upload Files tab, you can upload jpg, png, gif, pdf, psd, eps, xls, xlsx, doc, docx, csv, txt, and p12 file types. The maximum file size is 2 MB. If your photo or file is too large, the file should be saved as a smaller size using an image editing program like PhotoShop. If you don’t have PhotoShop, you could also use a free online photo editing tool located here: http://pixlr.com/express/.

4. Either drag and drop your photo or file directly onto the Upload Files area, or click anywhere on the area to open a file browser window. You can add multiple files or images at once.

5. When you are done uploading your files, click “Manage Files” to view your uploaded files. The new file(s) will appear in the top left of your list of files.

6. Each image file that you upload is assigned an image ID #. (In the example to the left, the image ID is located directly under the picture, #103.) The image IDs are later used when creating photo albums. Each non-image file (Word doc, PDF, etc.) is assigned a unique URL that can later be used if you want to link to a document from within an article.
Creating a Photo Album

1. To begin, the photos you want to include in your album should already be uploaded to your site. See “Adding an Image or File to Your Site” on page 21 for instructions on how to do so.

2. From the blue Admin button, click “Manage Files and Images.” Your screen should then show all the files and images you have uploaded to your site. Write down the Image IDs of each image you plan to add to your album.

3. Next, click the “Manage Image Albums” tab, then click blue box with the + sign in the upper right hand corner of the tab (under College Connect).

4. Give your album a name, and a brief description (optional).

5. In the “Included Images” box, enter each Image ID that you wrote down earlier, separated by commas (no spaces). There’s no limit to the number of images you can include in an album. The last image in your list of Image IDs is considered your “cover” image, and will appear as the thumbnail for your album on the homepage and on your Photo Albums page. Leave “Album Status” as general.

6. Lastly, click “save changes to this album.” That’s it! Your album will now appear on the “Latest Albums” section of your home page.
ENewsletters (Emails)

In the new Wellesley Community, emails are referred to as “eNewsletters.” The WCAA has set up eNewsletter templates for each Class, Club, and SIG. In this section, we will discuss how to access your eNewsletter template, edit the content, create a test email, and send out an email to your constituents. We’ll also discuss how to view email statistics.

Creating an eNewsletter

1. To begin, click the blue admin button in the main navigation and choose “Manage Newsletter.”

2. This brings you to your eNewsletter Repository. Here you will find all “pending,” or in draft emails, your “sent” emails, your email “templates,” and your “queued” emails (those you scheduled to go out but have not sent). Click the Templates tab to view your Class, Club, or SIG template we have preloaded for you.

3. In the Templates tab, you will see your default preloaded template. To create an email based on this template, click the gear icon on the far right and choose “Create campaign from template.”

4. The page will refresh, and you will see the pending tab, where a new copy of your template has been added to your list of email drafts. To begin editing this copy, click the gear icon on the far right and choose “Edit.”

5. The eNewsletter editor is very much like the article editor. The content section (between the two gray bars) includes the default HTML the WCAA has created for each Class, Club, and SIG. You can simply replace the default text with the text of your email. For more information about using the content editor, review “Creating a New Article” on page 11.
6. Note that your email template includes “Dear [first name],” by default. That tag enclosed by brackets will automatically populate your recipient’s first name in the copy of the email he or she receives. If you want to change the greeting to something more generic, such as Dear Classmate or Dear Member, you can delete the tag and type what you prefer.

7. You can easily drop links to your news or events articles using the black semi-circle dropdown menu (top left-hand corner of the eNewsletter editor screen). First, in the content section, put your cursor where you want the news or event link to appear. Next, click the black semi-circle, and you will see a list of “Available Articles.” You can drag and drop the news or event article you wish to highlight in your eNewsletter into the content section where your cursor was placed. To add another news or event article, repeat these steps.

8. Under the main text area in the content section, there is a text highlight box provided as an example of the type of dynamic text attributes you can include in your email. (It is shaded light gray and begins, “Every woman can—and should—make a meaningful contribution to her world.”) If you don’t need to highlight a part of your article, simply delete this text box by selecting all the text and hitting delete on your keyboard.

9. What follows includes a banner with your Class, Club, or SIG president’s name and contact information, your website link, and social media links.

10. Below your banner, the system will attach a banner with the WCAA’s social media links and contact information along with a default footer (which includes a privacy disclaimer and unsubscribe link). This piece is attached automatically each time an eNewsletter is sent. You will not see it in the eNewsletter editor and cannot make changes.

Below we will explain how to send a test eNewsletter as well as how to schedule and send it to alumnae. Skip the “Sending a Test eNewsletter” section if you do not need to see a proof.

**Saving and Sending a Test eNewsletter**

There are two ways to send a test eNewsletter: the first method sends the test to all administrators on your site; the second method sends the test to only your president.
Test eNewsletter: Method 1

1. When you are in the eNewsletter editor, you will see three fields: Recipient List, eNewsletter Subject, and Schedule Send. To send a test to all administrators, the only field you need to update is the eNewsletter Subject. **Note: The Recipient List defaults to “All Who Opted In,” but with this test method it is OK to leave that as is.**

2. Enter your email subject line. We recommend adding the word “TEST” before your actual subject line so it’s obvious that the email is a test once it is sent.

3. First click “Save,” then the blue “Send Test” button at the bottom of the page.

That’s it! Your email content is saved and will remain in the pending tab under Manage Newsletters, and a test email will immediately send. The test will be sent to anyone who is listed as a head administrator on your site. It will not appear in your “Sent” emails tab under Manage Newsletters.

Test eNewsletter: Method 2

Instead of sending your test eNewsletter to all your site head administrators, you can also set up your eNewsletter to go to one or more individuals.

1. When you are in the eNewsletter editor, scroll down to just below the content section. Instead of ignoring the Recipient List field (as you would have if you were using Method 1), you should change it to “Test Group.” By default, the test group includes your president’s email address only, though some will have been modified to include others who want to receive test emails. To have your test group modified by adding or deleting an email address, contact Robin Marshall at rmarshal@wellesley.edu.

2. Enter your email subject line. We recommend adding the word “TEST” before your actual subject line so it’s obvious that the email is a test once it is sent.

3. For the Schedule Send field, if you leave it blank, your test eNewsletter will be sent out immediately once you complete step 4. If you want your test to go out at a specific time, you can specify a date and time in this field.

4. Don’t forget to save! After you click “Save,” click “Queue/Send Now.”
Your test email will go out at the time and date you designated (or immediately, if you left Schedule/Send blank). If you set a time, you will find your test email in the “Queued” tab under Manage Newsletters. If you left Schedule Send blank, it will immediately appear under the “Sent” tab instead.

**Scheduling Your eNewsletter**

1. Once you are satisfied with the text of your email, you will need to specify who will get your email, the subject line, and the date and time the email will go out. For most emails, choosing “All Who Opted In” should be the default. That list includes everyone who belongs to your Class, Club, or SIG website. For now, you may only send to alumnae. Contact alumgroupsrequests@wellesley.edu if you need to email additional groups or wish to make a custom group of certain alumnae. In the future, there will be other groups you will be able to email. For example, if you are promoting a Club event specifically to parents of current students in your geographical area, you will have access to a Parents group.

2. Enter your eNewsletter subject line.

3. For the Schedule Send field, if you leave it blank, your eNewsletter will be sent out immediately once you complete step 4. If you want your eNewsletter to go out at a specific time, you can specify a date and time in this field.

4. Click “Save,” then “Queue/Send Now.”

That’s it! Your eNewsletter will go out at the time and date you designated (or immediately, if you left Schedule/Send blank). If you set a time, you will find your eNewsletter in the “Queued” tab under Manage Newsletters. If you left Schedule Send blank, it will immediately appear under the “Sent” tab instead.
Editing, Rescheduling, or Canceling Your eNewsletter

After scheduling your eNewsletter, there may be an instance where you want to make a change to the email content, change the send time, or cancel the email altogether. Follow the instructions below to make those kinds of changes.

1. First, click the Queued tab.
2. Next, click the red “Cancel” button next to the eNewsletter you wish to change.
3. You will then be asked to confirm whether you are sure you want to “de-queue” the eNewsletter. Click “Yes, please de-queue.”
4. Your de-queued eNewsletter will now appear back in the “Pending” tab. If you don’t know when you plan to reschedule it and want to save the email content for future use, your job is done. If you are canceling your email and wish to delete the email content, click the gear icon on the far right, and choose “Delete.” If you want to make a change to the content or change the scheduled send time, choose “Edit.”
5. Back in the eNewsletter editor, make your content change or update the Schedule Send time. If you are not ready to set the Schedule Send time, click “Save” and your eNewsletter will be updated and returned to the Pending tab. If you are ready to Schedule the eNewsletter after you change, click “Queue/Send Now.”

Your eNewsletter will now be updated with your changes. Note: Once the eNewsletter is sent, you cannot un-send or make changes.

Viewing Email Statistics

After your eNewsletter has been sent, you can easily check to see how many of your recipients have opened it.

1. To begin, click the blue admin button in the main navigation and choose “Manage Newsletter.” Click the “Sent” tab.
2. There you will find any email you’ve successfully sent, along with a high-level overview of your email statistics, which includes how many people received the email, opened it, clicked a link in it, flagged it as spam, and how many people used the unsubscribe link.

3. For a more in-depth report, click the blue “In Depth” button.

4. An expanded email statistics report will open below. There you can see how many “opens” and clicks were unique vs. raw (raw opens count every time the message is opened, including multiple opens by the same person; unique opens are counted only the FIRST TIME the message is opened by each user). You can also see what links were clicked and by whom, as well as who opened your email. Please note: Some browsers count open rates at an artificially high frequency.
Selling Merchandise

In addition to selling event tickets, you are able to sell general merchandise on your class, club, or SIG website. Your merchandise is visible to site visitors on the main page of your site. If you have at least one item for sale, a new section of your website automatically appears, titled “[Class/Club/SIG Name] Store.” An example of an active club store is shown at the left.

Keep in mind: Event tickets and donations, although technically “store items,” do not trigger the Store section to appear on your homepage. Only items categorized as “Featured Items” (discussed below) will cause the Store section to appear on your homepage.

Adding a Store Item

To add a tangible/physical item to your store (as opposed to an event ticket), follow the steps below.

1. To begin, click the blue admin button in the main navigation, and choose “Manage Store.”

2. Click the “Manage Items” tab, then click the blue + symbol on the right hand side of that tab.

3. On the next screen you will enter details about the item you’re selling. Give it a title, a brief description (color, size, features, etc.) For item attributes, assign it as “general.” Assign your price, and leave the “Visible in Store” box checked.
4. Linked event is only used for ticket sales, so leave that field blank. You can enter a quantity limit if there is a finite amount of the items you’re selling, and/or set a maximum quantity each user can purchase. Otherwise, leave those fields blank.

5. You can also enter a start and end date for when your item goes on sale. If you want it to be available now and don’t plan to stop selling it anytime soon, leave these date fields blank.

6. In the next section, add shipping charges (if you are accounting for them separately from the item cost) by checking the “Requires shipping” box and adding an amount in the “Surcharge” box.

7. In the Categories box, click “Featured Items” to ensure the item appears in your homepage store. **Important: Categorizing the item as “General Merchandise” will not put the item in your store.**

8. Also enter the item size and color information in the next boxes, if it has any. The auxiliary Sku information is not required (if your item has an identifying number you want to include, you may include it here).

9. Next, you may choose to restrict the purchase of this item to a certain membership group. If you want purchase to be unlimited, do not check any of the restrict purchase boxes.

10. Lastly, upload one or more images for your item by clicking the “Browse” buttons and searching for your image in your files. The first image you upload will be the “cover” image, and is what will appear on your site’s homepage. Note that the recommended size for store item images is 800 x 800 pixels. If you do a smaller size, it may not fit well on your homepage store.

11. Click “save changes to this item.” Your page will refresh, and your item will be saved. If you now return to your home page, the store item should appear at the bottom of the middle column (under News).
Downloading an Order Report

To view all the orders that have been placed for a specific item or event ticket, you can download an order report using the Manage Store function.

1. To begin, click the blue admin button in the main navigation, and choose “Manage Store.”
2. Click the “Manage Items” tab, then find your item or ticket’s SKU # at the bottom of that screen.
3. Copy your SKU #, then click the “View Orders” tab.
4. Enter your SKU # in the SKU field. Choose the report type (we recommend “Generate Extended Excel Report”), and click Apply Filter.
5. Your report will immediately begin downloading.
Membership/Class Dues

Setting Up Membership Structure (for Clubs and SIGs)

It’s fast and easy to set up a page for collecting your club or SIG membership fees.

1. To begin, click the blue dot in the home page main navigation. From the drop down menu that appears, click “Manage Memberships.”

2. This opens the Membership Levels Configuration Tool. You can have up to 20 different membership levels for your members to choose from. (So, for example, you can set up Annual, Two-Year, Three-Year, Young Alumna, or other types of custom membership.) As a default, these levels are set to inactive.

3. Next, open the first level you want to edit and activate by clicking the gear icon.

4. On the next screen you can name your membership level and write a brief description about it. It’s also very important at this stage to set the Status and Life options. If you want the membership level to be available to your members for purchase, it must be set to active. (Later, if you decide to temporarily or permanently take down the level, you can edit again and set it to inactive.)
5. The Life option sets the term of the membership. In our example, this is an annual (one year) membership so we set it to annual. The term is specific to the member who purchases it. So if Member A purchases the annual membership on July 1, 2014, it is valid through June 30, 2015; if Member B purchases the annual membership on December 1, 2014, it is valid through November 30, 2015.

6. You'll then want to set your pricing structure for the membership level. You can have three different prices if you so choose: a new member price (for anyone purchasing this level for the first time); a renewing member price (if the member is renewing this level after the membership has expired); and an extending member price (for any current member who is renewing before her current membership has expired). You might set these levels at different prices to encourage participation, or the prices can be the same.

7. Next, set the pre-screen option for each membership level price. The four options include:
   - Open to all – anyone can purchase this type of membership.
   - Auto screen – uses a set of criteria/questions to determine whether the user is eligible to purchase the membership.
   - Manual review – the prospective member fills out what is essentially an application form, which is then sent to the membership review board group (whose members are defined by you, the administrator). If approved, the prospective member gets an email from the site saying it is now okay to purchase the membership.
   - Post-payment review – this is very similar to “Open to All,” but with one big difference: when someone buys the membership, the person’s membership status is not yet active. A site administrator must then go into Manage Users -> Edit Account Info -> Edit Membership Info and change the “User’s Membership Status” to “active.”

8. When you are satisfied with your pricing, click “Save Changes.”

Once you have set up the different membership levels you would like, you can see how the levels will look to your members on the site. Any membership level you make “active” automatically feeds to two pages under the “Support Our Club/SIG” tab in the main navigation.
Setting Up Class Dues Structure (for Classes)

Setting up class dues for your website follows the exact same process as the Club/SIG membership setup process described in "on page 32. (The content management system does not differentiate between what Clubs and SIGs refer to as “membership” and what Classes refer to as “Class Dues." In the system, everything is considered membership.) The WCAA will be adding the information about your lifetime dues-paying members into the system. You will have to input information about who has paid annual dues, if your class offers that membership option.

For classes, the tab in the main navigation that your classmates uses to purchase a membership is instead called “Support [Insert Class Year].” The only sub-page your classmates have to choose from is the Class Dues page. When your classmate is logged in to your website, the website will recognize whether the person is already a Lifetime or Annual member, or if it's time that she purchase a new membership.

To set up your class dues, follow steps 1 through 6 in the previous section, "on page 32."
Forums, or discussion groups, are a great way to start conversations among your members. Only site administrators can create a new forum, but any member of your Class, Club, or SIG can create a topic within a forum. By default, a user must be logged in to your site in order to view any of the forums.

For example, as an administrator you might create a new forum called “Favorite Wellesley Memories.” Within that forum, your members can post new topics based on the memory that they want to share with the other members. Members can respond to and comment on each topic that’s created. Members access existing forums by choosing News in the main navigation, then Discussion Groups.

Creating a New Forum

1. To begin, click the blue dot in the main navigation, then Manage Forums. This will open the Manage Forums Tool.

2. You will see a list of your existing forums, which you can edit as needed. To add a new forum, click the blue + icon in the top right-hand corner of the page.

3. A new page will open where you can enter information about your forum. Give the forum a name and description. For status, make the forum active if you want it to appear on your site’s discussion groups page immediately. Later, if you want to take down a forum, you can mark it as inactive.

4. Forum rank controls where it will appear in the list of active forums on your site’s Discussion Groups page. Lastly, enter a group restriction. Leave this as “no group restriction” unless you only want a certain portion of your members to access it.

5. When you’re satisfied with your forum, click Save Changes. You can always return to this screen and make changes by choosing Edit in the
6. Later, when you enter the forum, you can see how many replies have been made, along with how many times it has been viewed.

<table>
<thead>
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<th>Views</th>
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<tr>
<td>Scott</td>
<td>2</td>
<td>4</td>
<td>03/17/15 11:20</td>
</tr>
<tr>
<td>Robin</td>
<td>4</td>
<td>13</td>
<td>03/17/15 10:29</td>
</tr>
</tbody>
</table>
Resources

The following resources are available to help you learn how to manage and maintain your new site.

Support Tracker

If you have a general question about your site, would like to report an issue with your site, or would like to discuss a new feature, the easiest and fastest way to contact your support team at the WCAA is through your site’s Support Tracker feature. Support Tracker is a forum within your site that only you, as the site administrator, and the WCAA support team can access. The support team here at the WCAA will make every effort to respond to your query within 24 hours.

1. To create a new Support Tracker request, begin by choosing “Support Tracker” from the blue dot admin menu.

2. Next, click “New Inquiry” in the top right hand corner of the page.

3. In the “Subject” box, assign a title for your request. For example, “Problem updating tickets for an event.”

4. In the “Message Body” box, add a description of the problem you’re experiencing or include the question you want to ask. For example, “When I saved Article ID# 210, it did not appear on the homepage as it should have.”

5. Lastly, assign an “Inquiry Type” and “Urgency.” The inquiry type could be Trouble Ticket, Production Request, General Question/Comment, or New Feature Request. For urgency, always assign “1 - FYI (no action needed).” Even if action IS needed, please always use this urgency. Assigning your request as a 1 is the only way the WCAA support team will be able to see your request. Later, the request may be bumped up to a higher level urgency by the WCAA support team.

6. Click “Submit topic.”

That’s it! Someone at the WCAA support team will respond to your query.
within 24 hours. If you submit your request on a Saturday or Sunday, please expect a response that Monday, as the office is closed on weekends.

Videos

Overview of Manager Functions

Creating an Event Ticket (watch sequentially)
www.alum.wellesley.edu/magnet.help.html?resource=151 (0:30)
www.alum.wellesley.edu/magnet.help.html?resource=152 (1:42)
www.alum.wellesley.edu/magnet.help.html?resource=153 (5:58)

Duplicating an Event Ticket
http://www.alum.wellesley.edu/magnet.help.html?resource=154 (2:14)

Creating and Editing an Article
http://www.alum.wellesley.edu/magnet.help.html?resource=327 (14:23)