Wellesley College Alumnae Association Web Administrator Manual

- This guide provides instructions for the administrative side of the WCAA web platform for classes, clubs, and shared identity groups.
- From managing content on your group's website, to sending out broadcast emails, and setting up event registrations—you'll find the directions you need. You can also watch training videos here.
- This document will be continuously updated to reflect any changes to the back-end of the web platform and/or our operations.
- Please use the Table of Contents on the first page to locate information on specific topics.
- For initial training purposes it is suggested to start at the beginning of this manual in order to become familiar with the platform structure and functions.
- If you have questions that are not answered in the manual or experience any difficulties, please email wcaawebsupport@wellesley.edu.
- **Thank you for all you do for Wellesley!**

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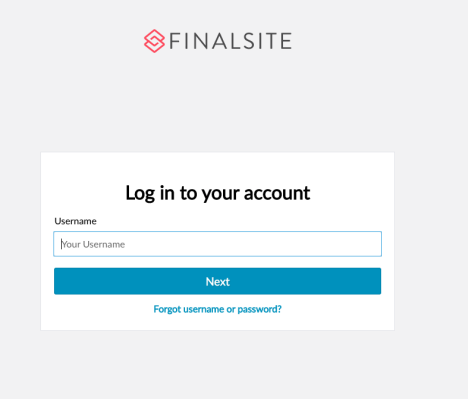
Welcome and Logging in Instructions

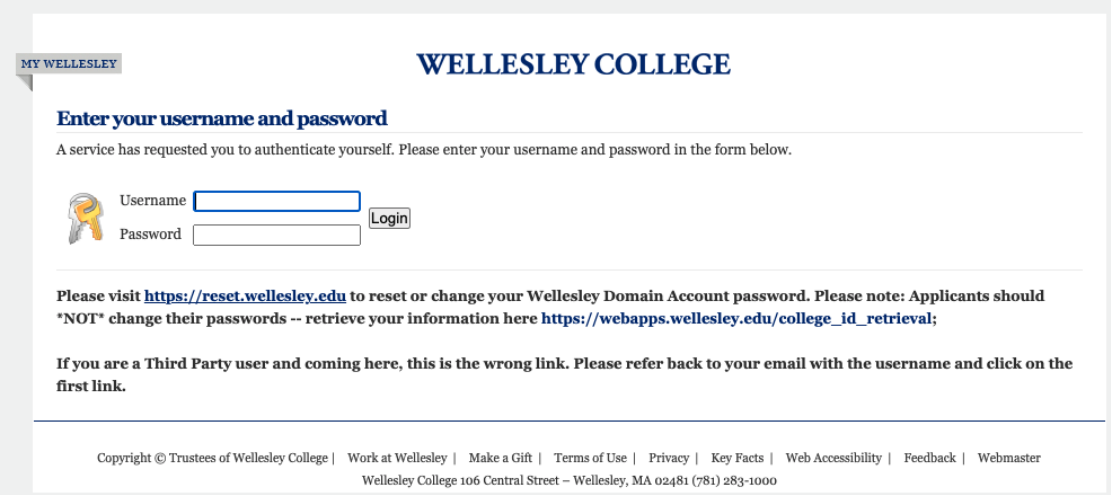
HOW TO LOG IN TO THE WCAA WEB PLATFORM

1. For access to the administrative side of the WCAA Web Platform, go to: https://alum.wellesley.edu/admin

2. Enter your MyWellesley username and click “Next”.

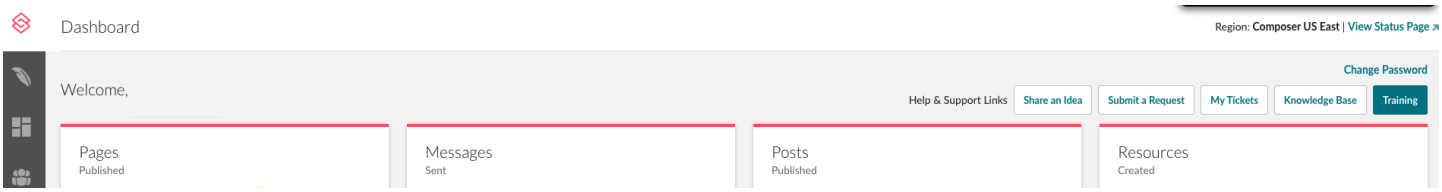


3. You will then be taken to the Wellesley College verification page. Please enter your Wellesley username and Wellesley password. If you are already logged in to your My Wellesley account, this step will be bypassed.



If you don't know your MyWellesley username or password, please visit https://www.wellesley.edu/alumnae/wellesleylogin to recover or reset your login information.

4. Once you have been verified, the Dashboard page will appear.



NAVIGATING THE PLATFORM

1. Most functions are found in the Waffle menu and the file menu called Resources:

Waffle Menu:

Resources:

Within the Waffle menu you will find important modules for editing your site.

- ***Calendar Manager*** is where listings for your calendar will be made.
- ***Forms Manager*** is where event registrations and other forms are created.
- ***Messages*** is the broadcast email tool.
- ***Posts*** are where content is created and managed.

The file folder icon for Resources is where images and slideshows are housed to use on your site and in email.

Please note:

- Any photo used, regardless of how often, must be uploaded to Resources. The only exceptions are if you are including an image on a Form or Calendar Event (not a Post Event)—in these instances images can be uploaded directly from computer files.

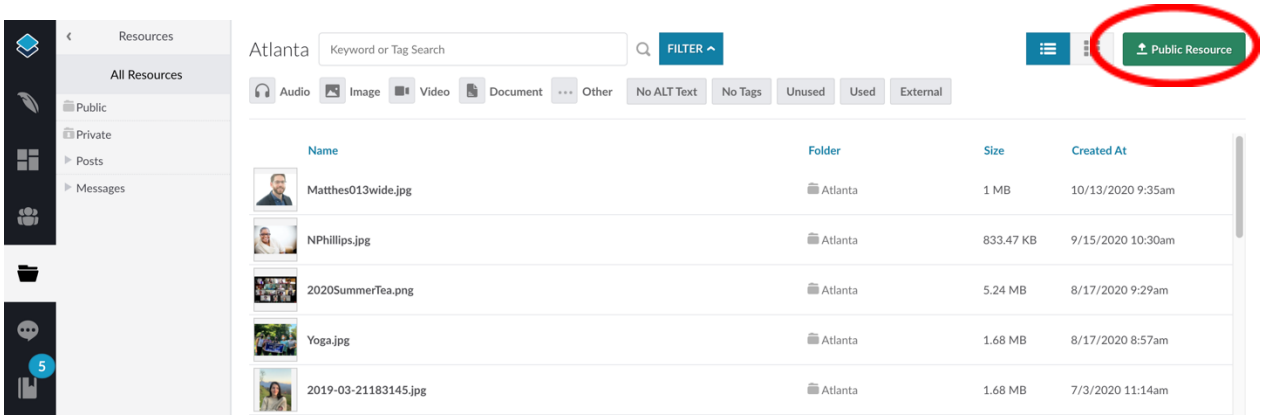
Managing Photos and Files

By clicking on the Resources folder, you will see all the images and files available to use on your website.

UPLOADING A NEW IMAGE OR FILE

1. Click on the folder you want to upload your new image or file under.

2. To upload a new image or file, click on the green button in the upper right corner that says “Public Resources.” Images uploaded here are not visible in Resources to other group’s administrators. Public Resources means that your photo will be visible to everyone wherever you post the image, unless the page is behind a password. Please note that images in photo albums won’t be viewable unless an alum is logged in.

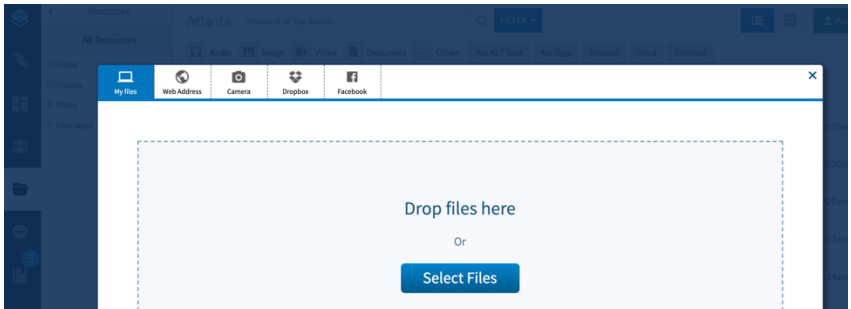


3. Drag and drop or go into your computer’s file manager to select which image or file you would like to upload. Images should be no larger than 100 MB. There are no restrictions regarding how many images can be included in the Resources folder.

4. Click save and the new image or file you uploaded will be at the top of the list of files and images.

UPLOADING MANY IMAGES OR FILES AT THE SAME TIME

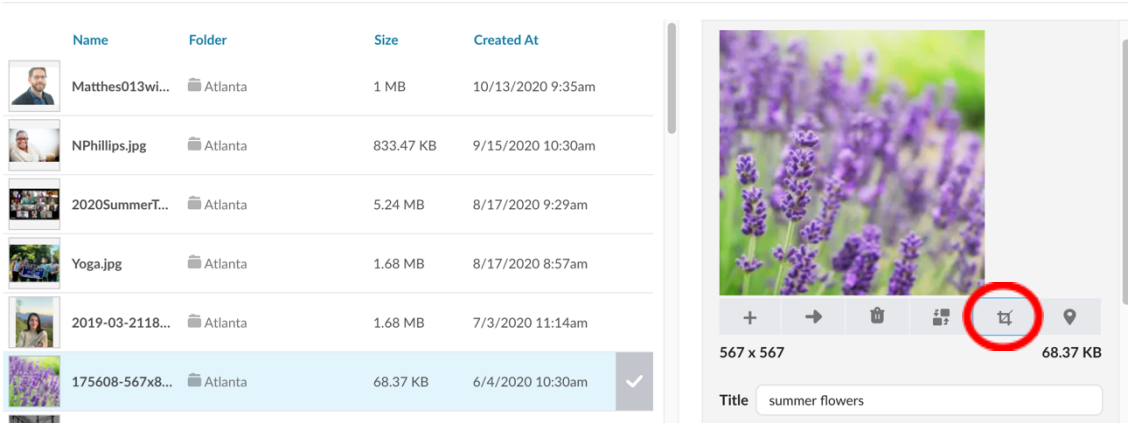
1. Select all the files and/or images you want to upload and drag them into the area that says “Drop files here." You can also click "Select Files" to manually select the files you want to upload.



EDITING AN IMAGE

1. Click on the photo you wish to edit.

2. Click on the edit image button (circled in red in the image below) to launch the built-in image editor.



You have a few image editing options:

- Rotation
- Cropping
    - o There is a custom crop option, or you can use any of the four presets.

3. To save the edits you made to the image, click the “Save Image” button.
    - You can either save the image as a new image or replace the original.

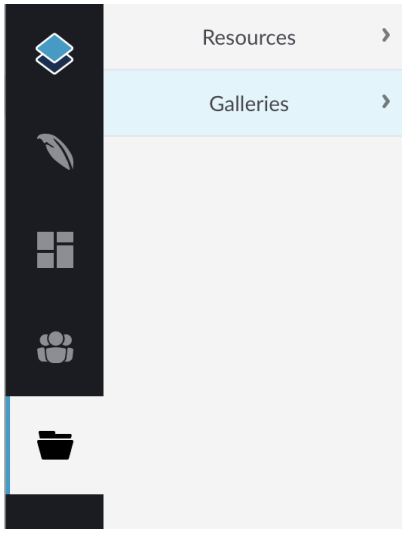
HOW TO MAKE SLIDE SHOWS

Photo albums/Slide shows are called Galleries.

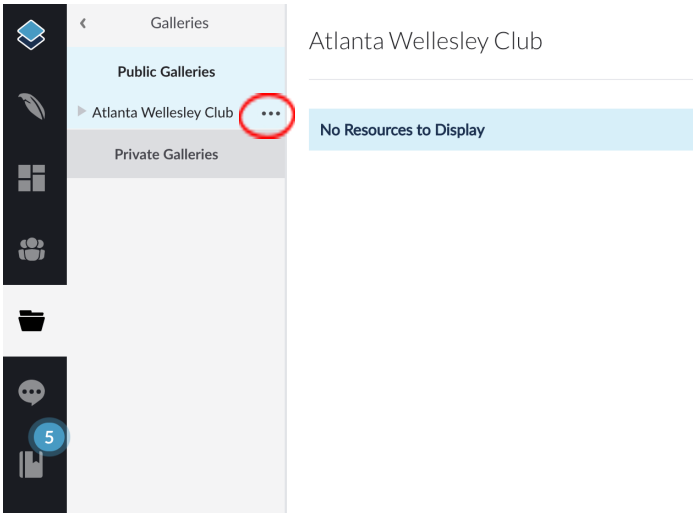
In the Resources module is a Galleries option. Galleries are where individual photos are grouped into slideshows for use on your website. The four slideshows that show on every site's homepage are the first four sub-galleries in your list of galleries.

Let's look at the Wellesley Atlanta Club homepage. These four galleries, visible at the bottom of the club's homepage will always be the first four galleries here in the backend. Anything beyond the first four will show on another page called All Galleries.

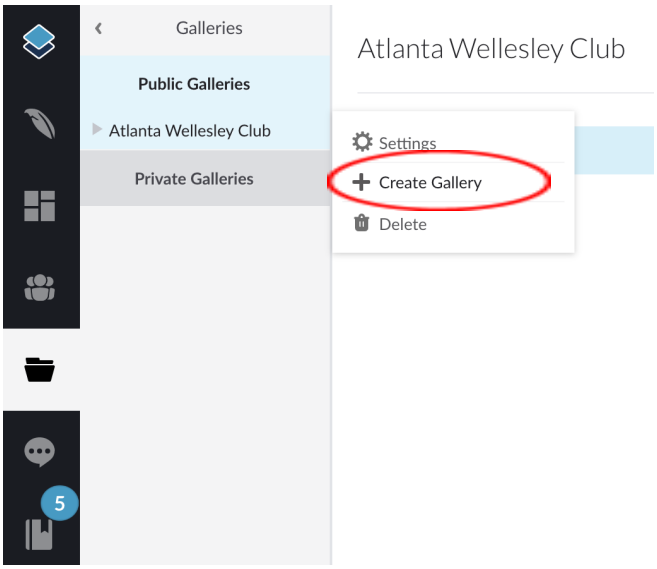
1. Click on the Resources folder icon and click on the "Galleries" tab.



2. To create a new gallery, hover over the site you would like to add a gallery to and click on the three dots.

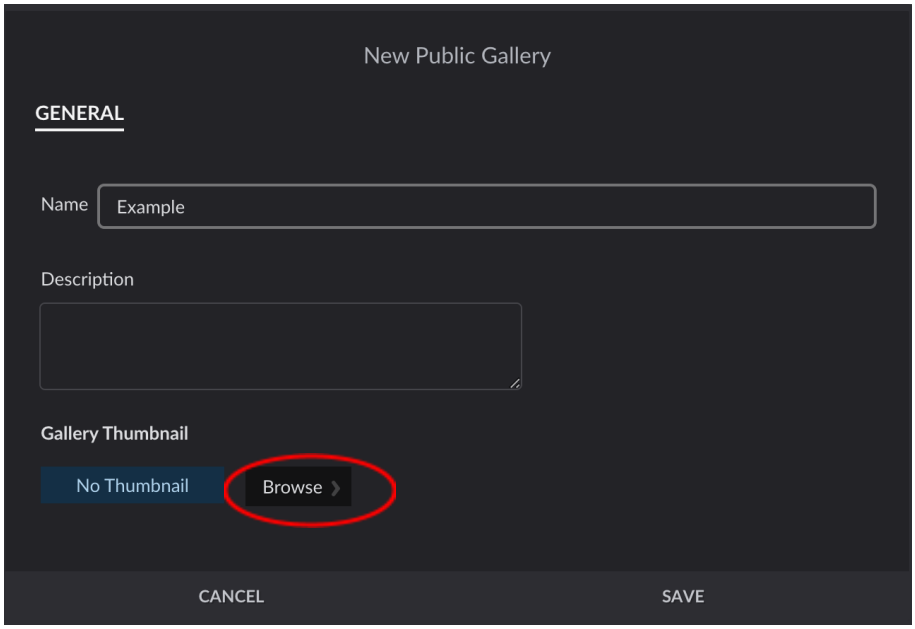


3. Click on Create Gallery.

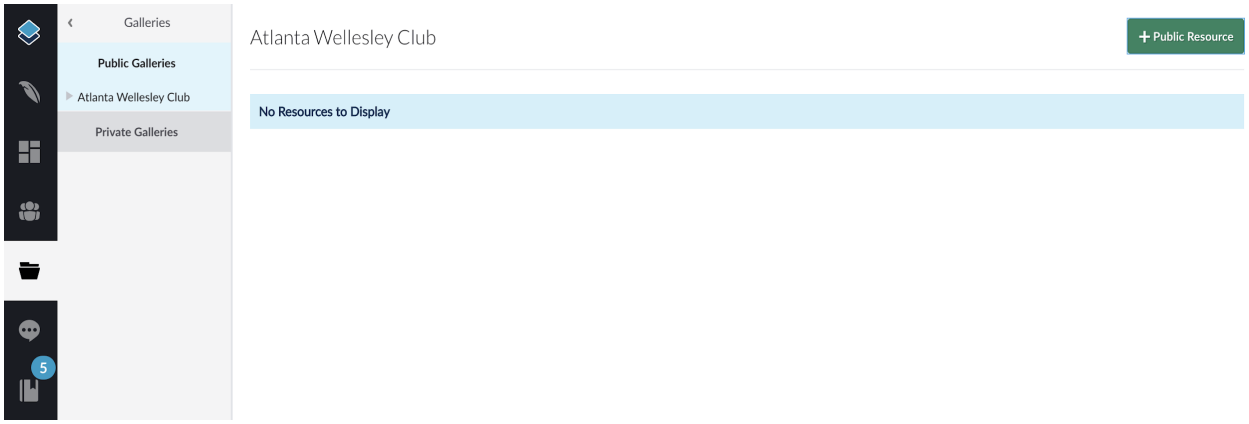


4. Give the gallery/slideshow a name. This will show up on the website.

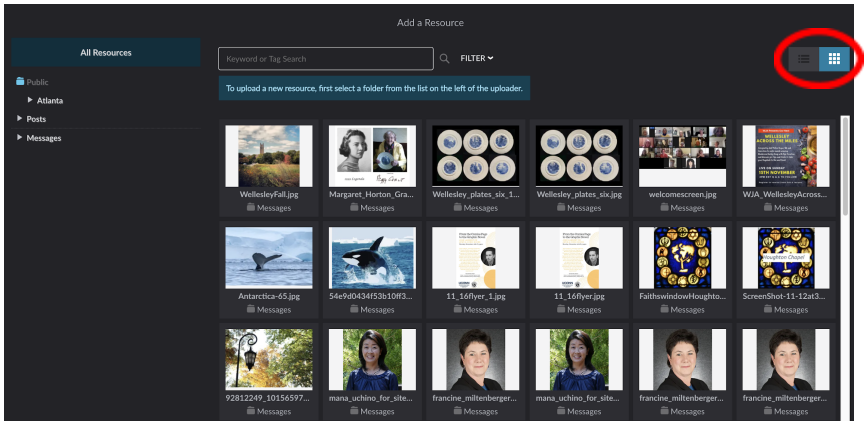
5. You also need to give the gallery a thumbnail image. You can do this by clicking on the Browse button. Just select one of the best images from your gallery.



6. To add images to your gallery click on the album and then the green button in the top right corner that says Public Resource.



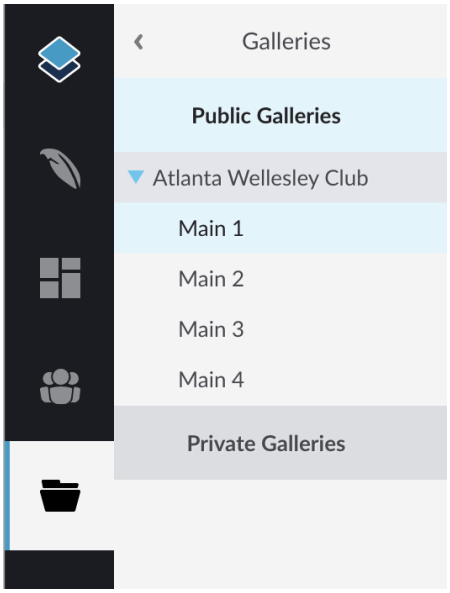
7. Then find an image to add to your gallery. It is easier to view images with the grid view. You can toggle between list view and grid view by clicking on the grid view button.



8. Repeat steps 5 & 6 for each image you would like to add to your gallery.

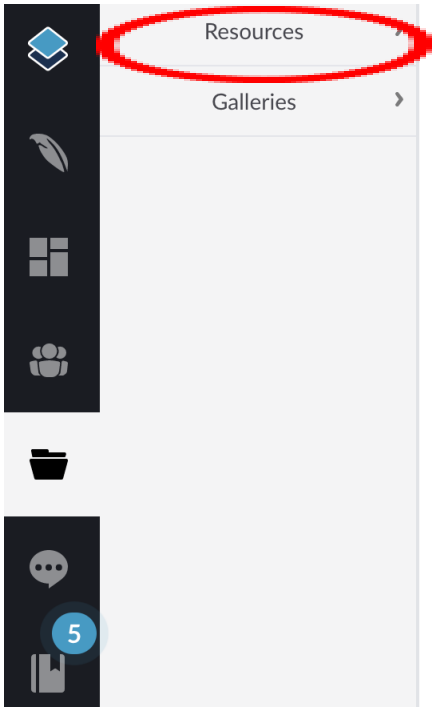
9. Click the “Update” button in the bottom right corner when you are finished.

10. If you want this gallery to be one of the four featured galleries on your homepage, you can drag it up to the top of the list.

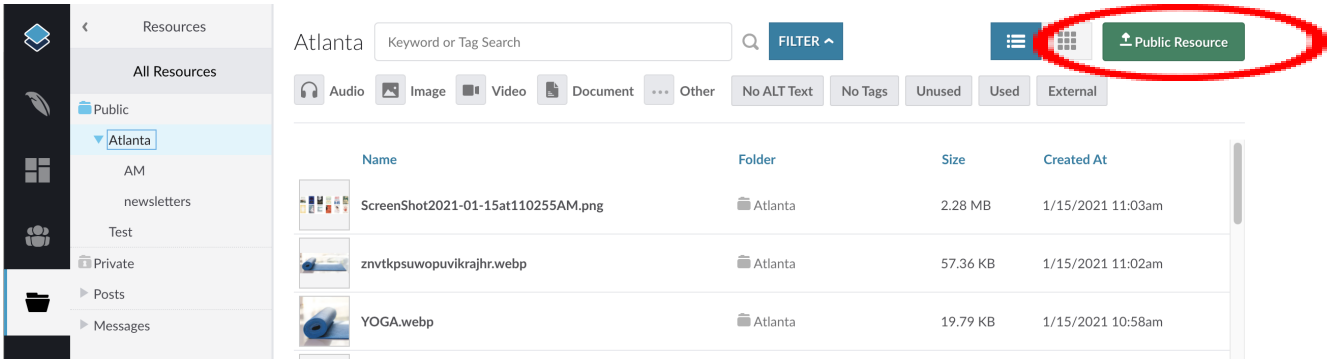


ANOTHER WAY TO MAKE SLIDESHOWS

1. In Resources, instead of clicking on the Galleries button, click on the Resources tab.

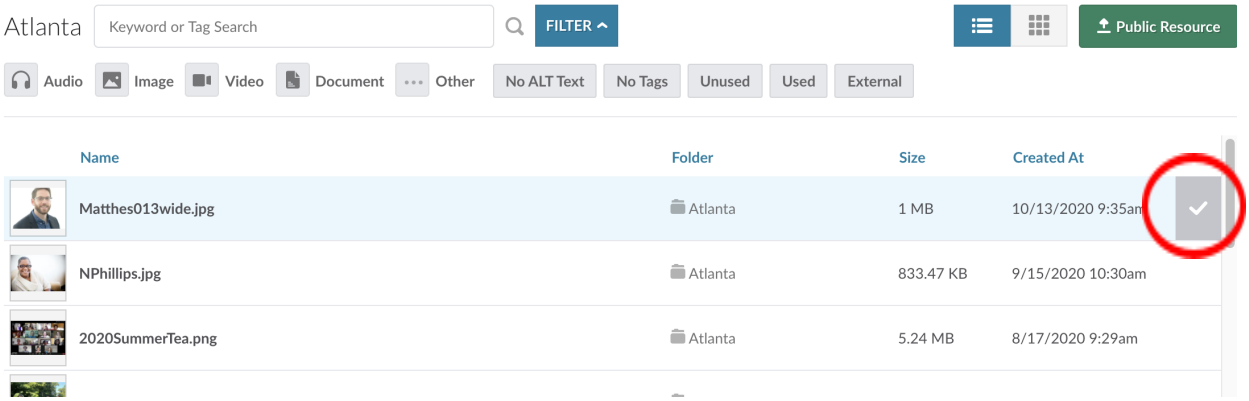


2. Click on the green button that says “Public Resource” in the upper right corner.

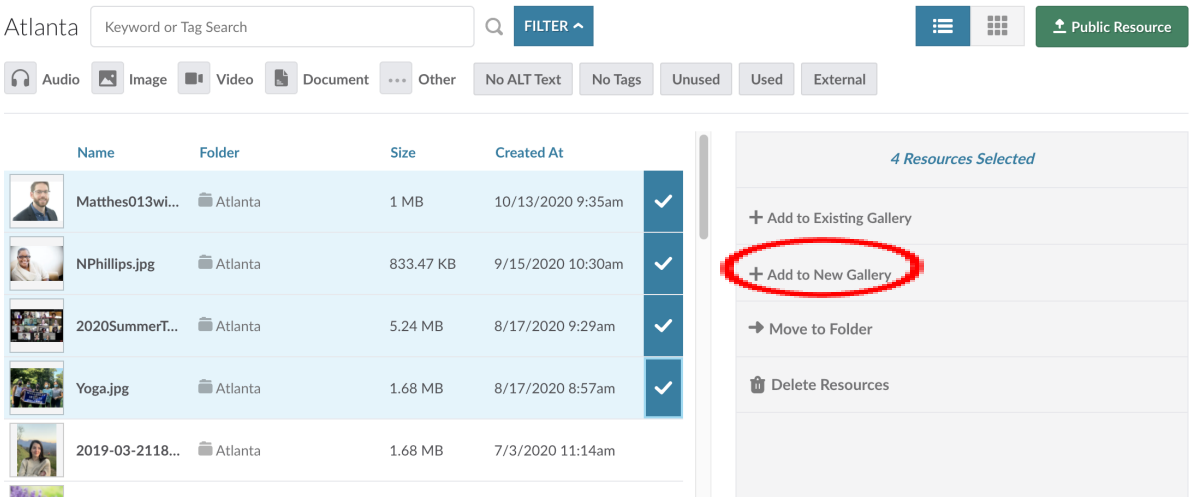


3. Upload the pictures that you want for your slideshow.

4. Hover your cursor over each of the images you want for your slideshow and click on the gray check mark that appears at the right end of each image.

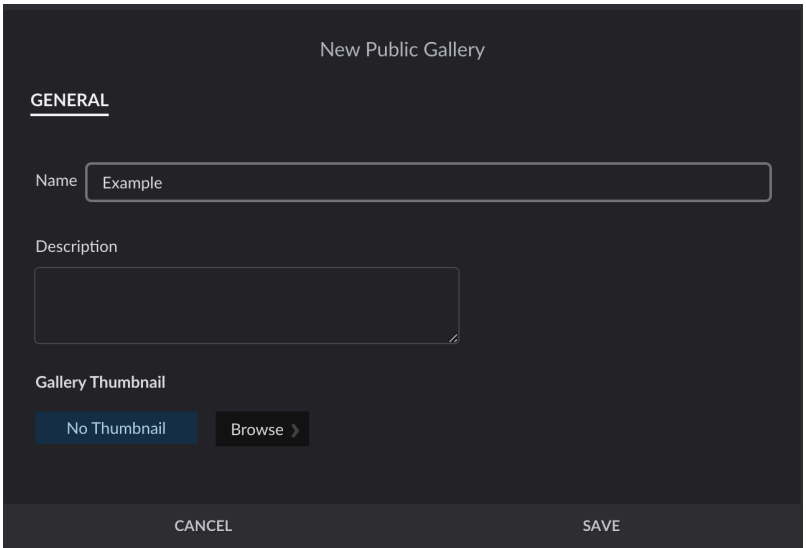


5. Once you have selected all the images you want for your slideshow, click on the button that says, "Add to New Gallery."



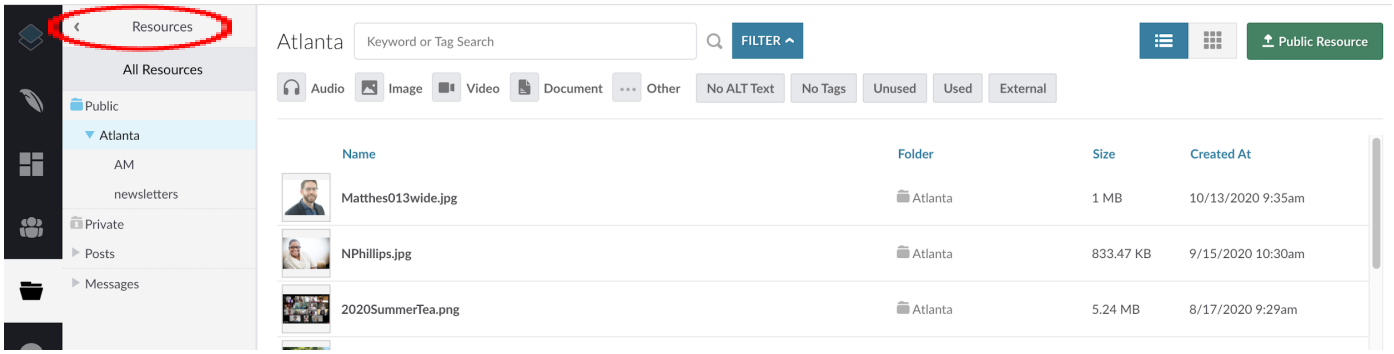
6. Select the parent of the new gallery and give your gallery a name, remembering that the name will be public on the website.

7. Add a thumbnail for your gallery by clicking on the browse button. Choose one of the images you uploaded for your gallery.

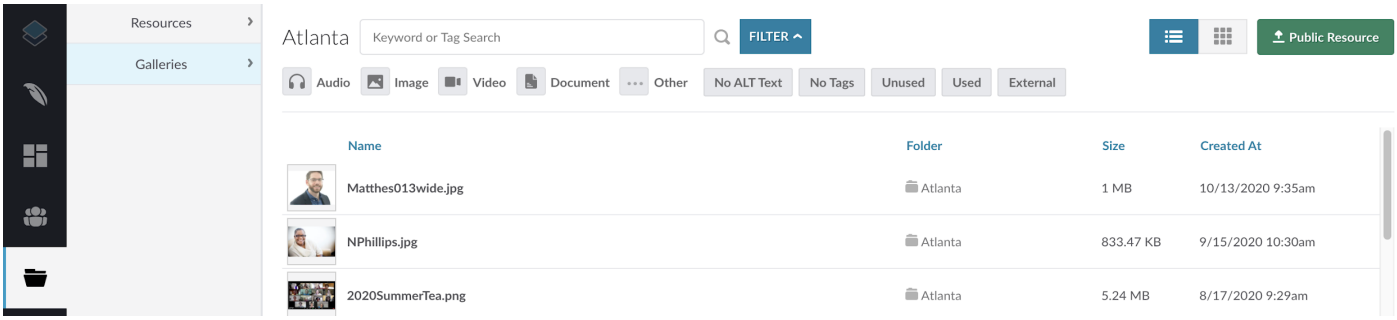


8. Click “Save.”

9. Toggle to the Galleries tab by clicking on the back arrow of Resources.



10. Click on the Galleries tab.



11. Click on the parent gallery you saved your new gallery under and your new gallery will appear at the bottom of the list.

12. If you want your new slideshow to appear on the front of the homepage, drag it to the top of the list.

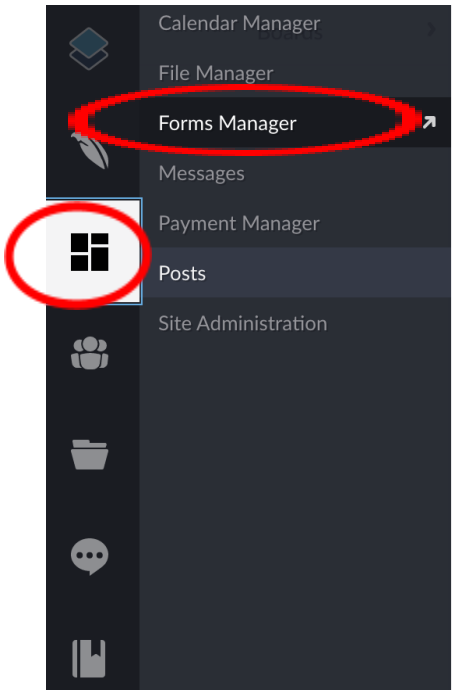
13. Go to your group’s website and you will see your new gallery.

Event Registrations

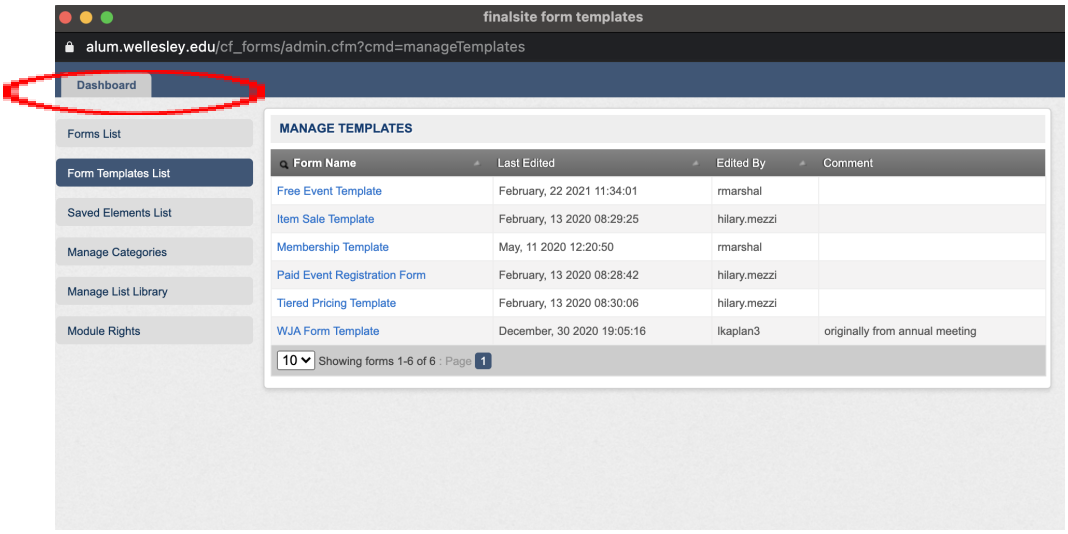
Here's how to make a form for an event registration.

CREATING A FORM FROM A TEMPLATE

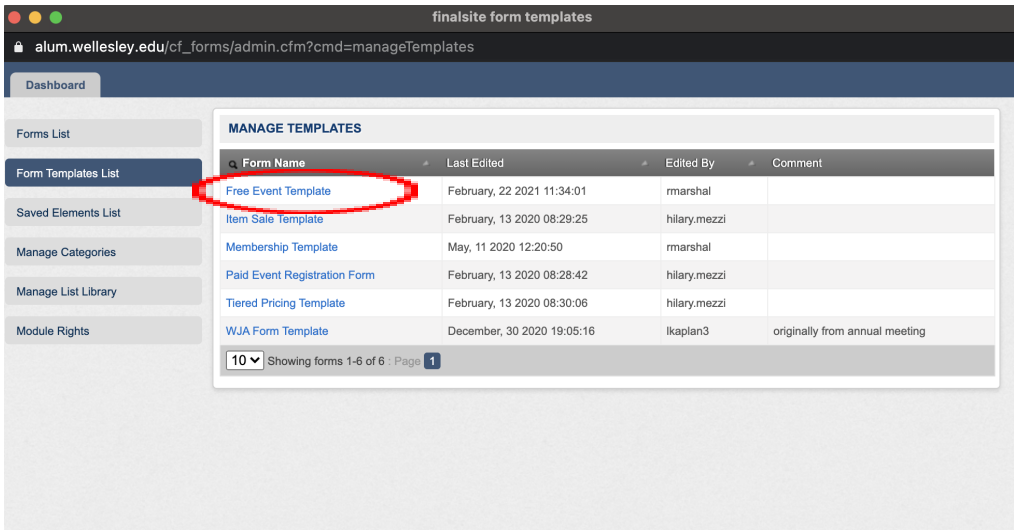
1. Hover over the waffle menu and click on "Forms Manager."



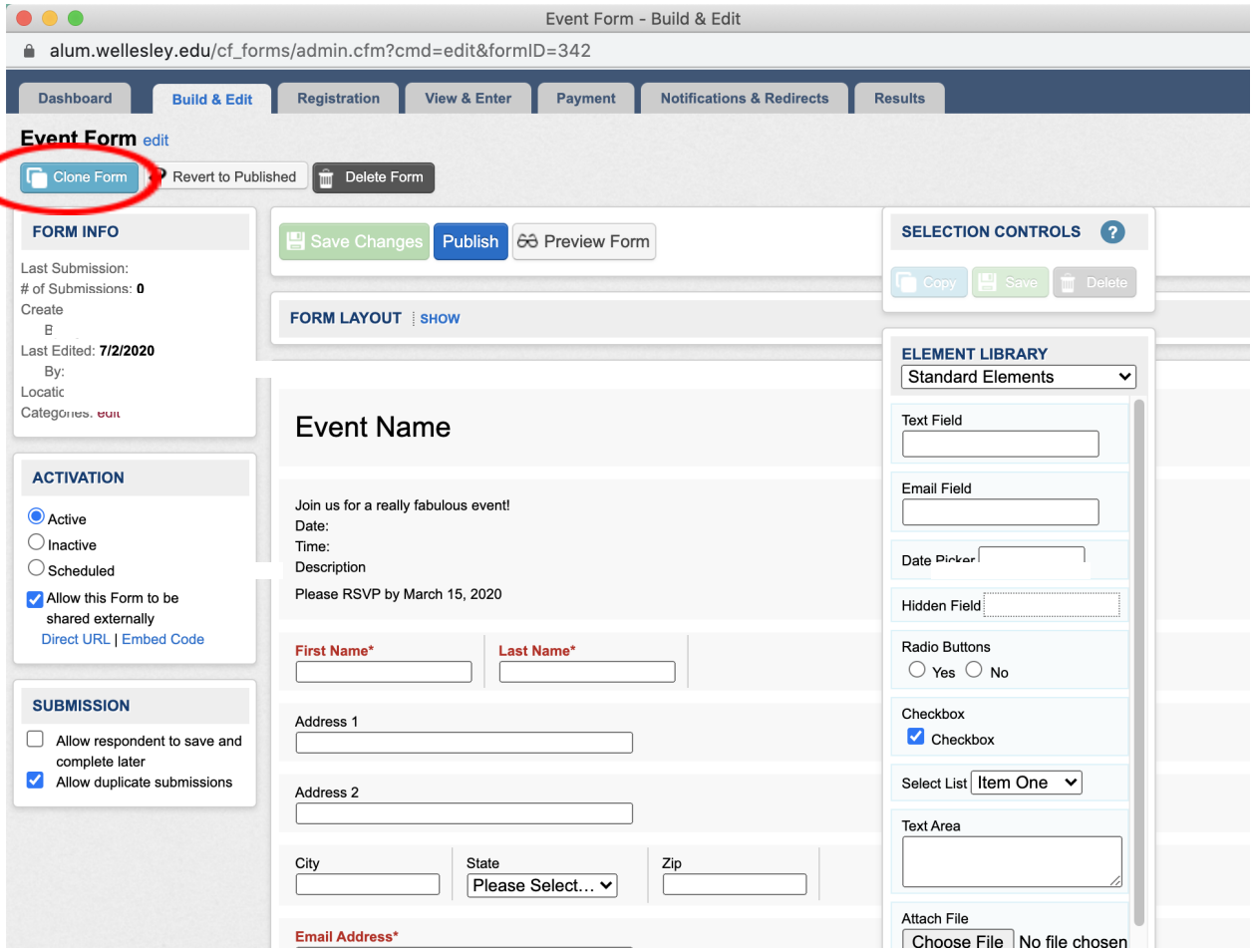
2. Click on the tab that says "Form Templates List."



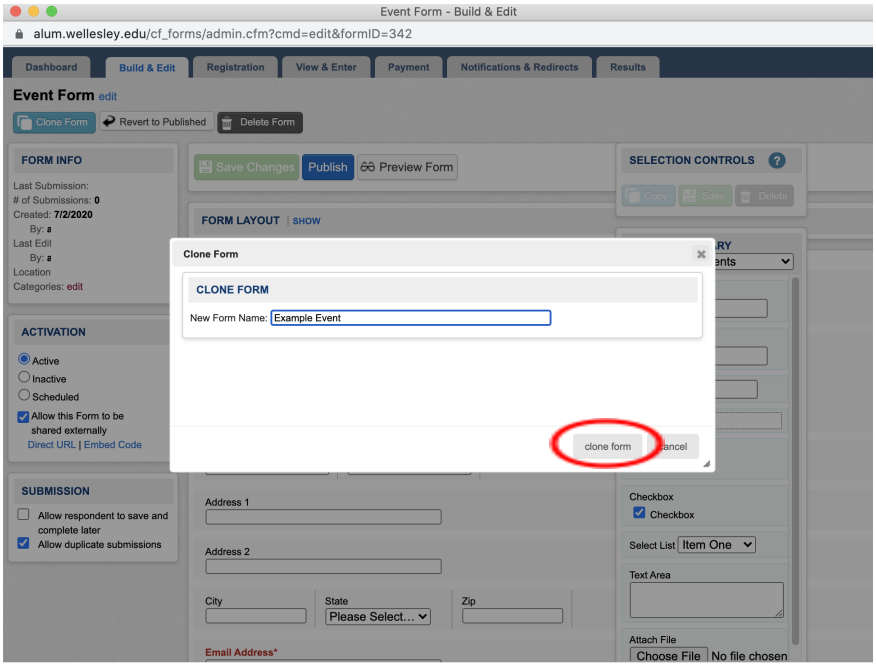
3. Click on the form that says "Free Event Template."



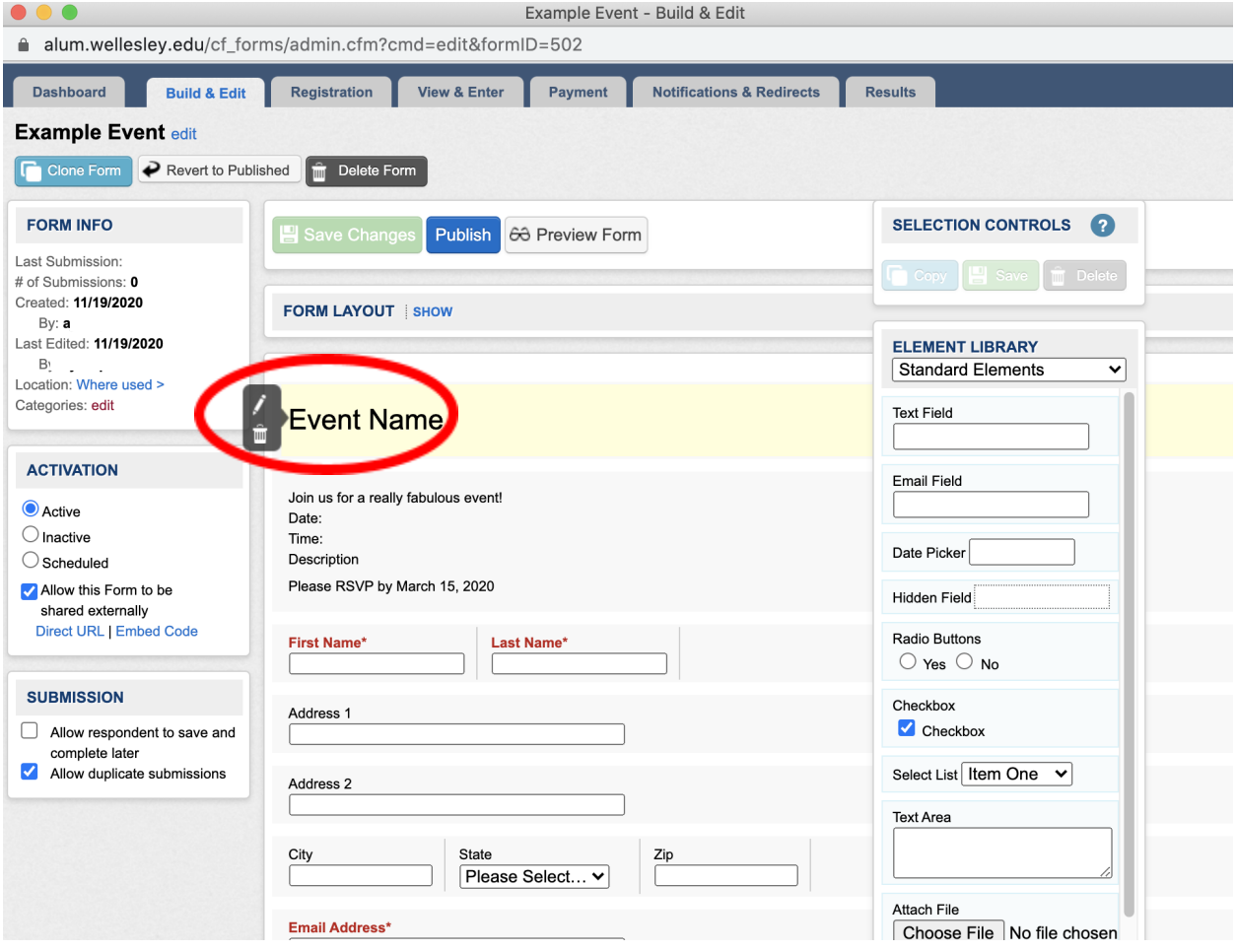
4. Click on the blue button in the corner that says "Clone Form".



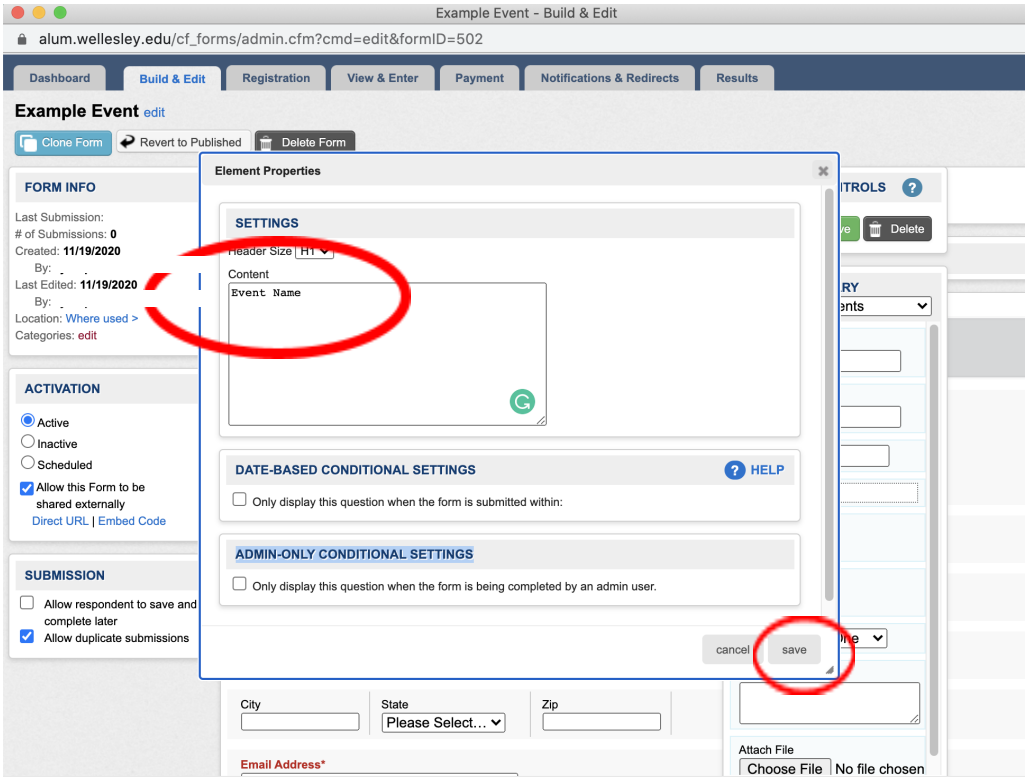
5. Now you have your own copy of the template to edit. Name your event and click on the button that says "Clone Form."



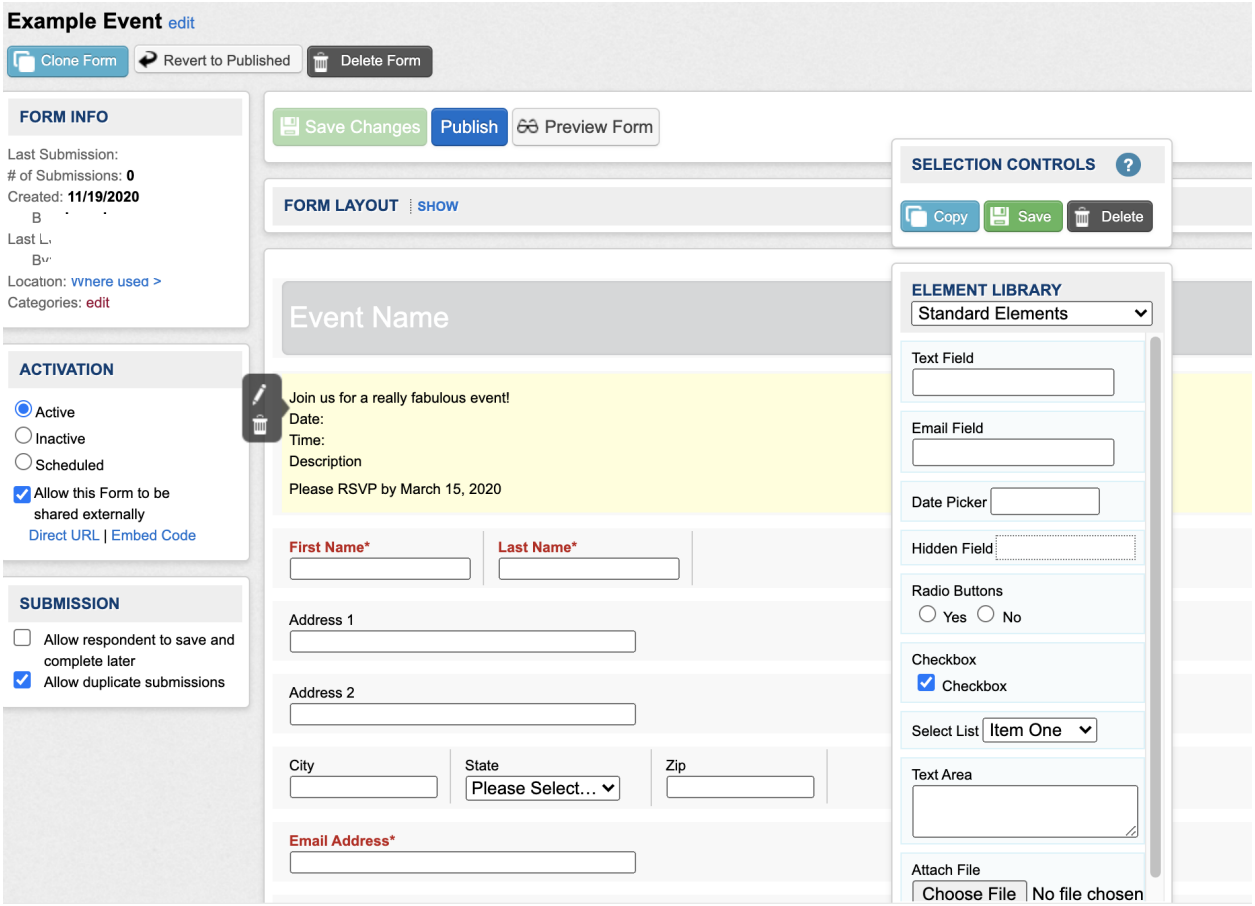
6. Hover over "Event Name" and click on the pencil icon to edit the name.



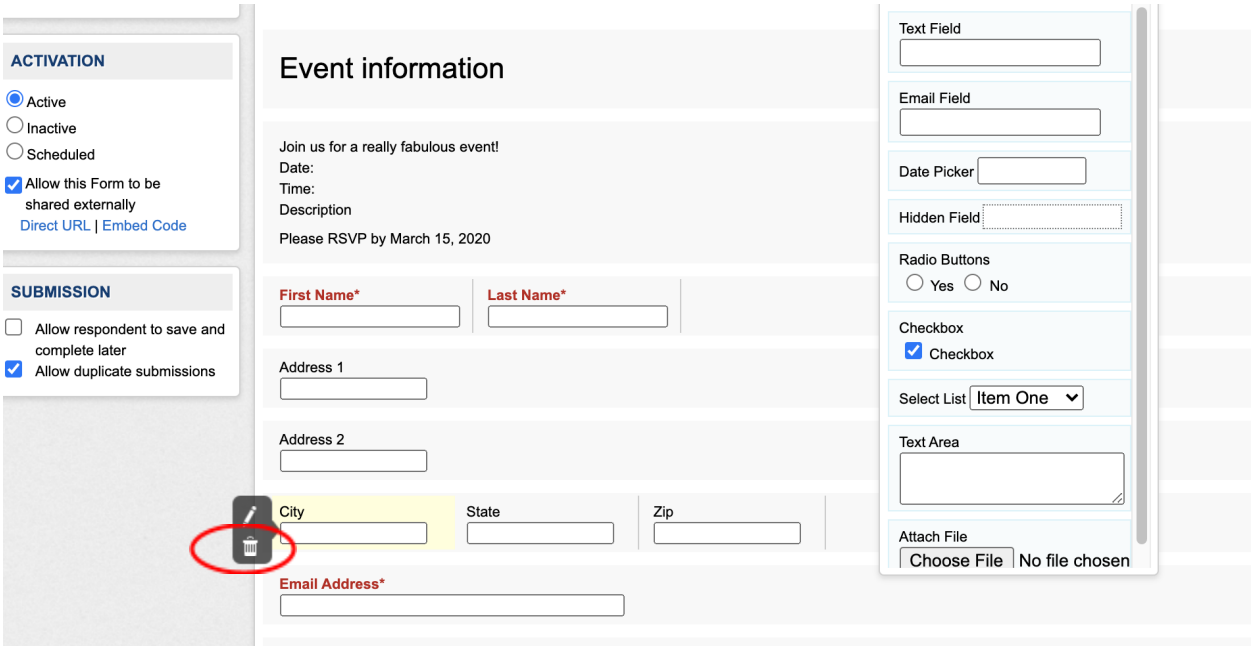
7. Change the name in the Content box to what you want your event to be named and click the “Save” button at the bottom.



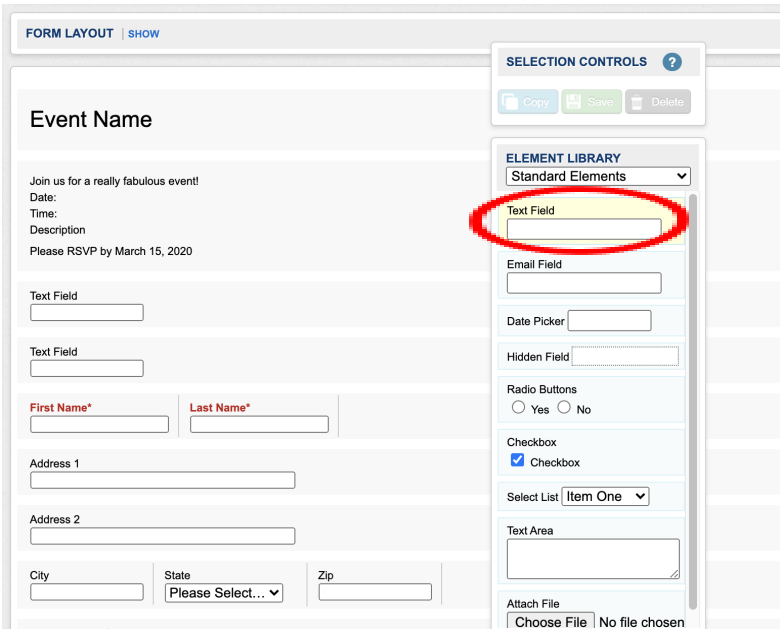
8. Do the same thing for the Event Details section. Hover over the section and click on the pencil icon to make edits. Make sure to click the “Save” button to save the edits you made.



9. Delete the information boxes that you do not need for your form. For example, if you do not need the city section, hover over it and click the trash can icon.



10. If you would like to add an information box, drag the box that says “Text Field” onto your form.



11. Click the pencil icon over the new text field you added to edit the information.

12. Save your form and publish your form. **Please note:** All forms can be accessed by all web administrators.

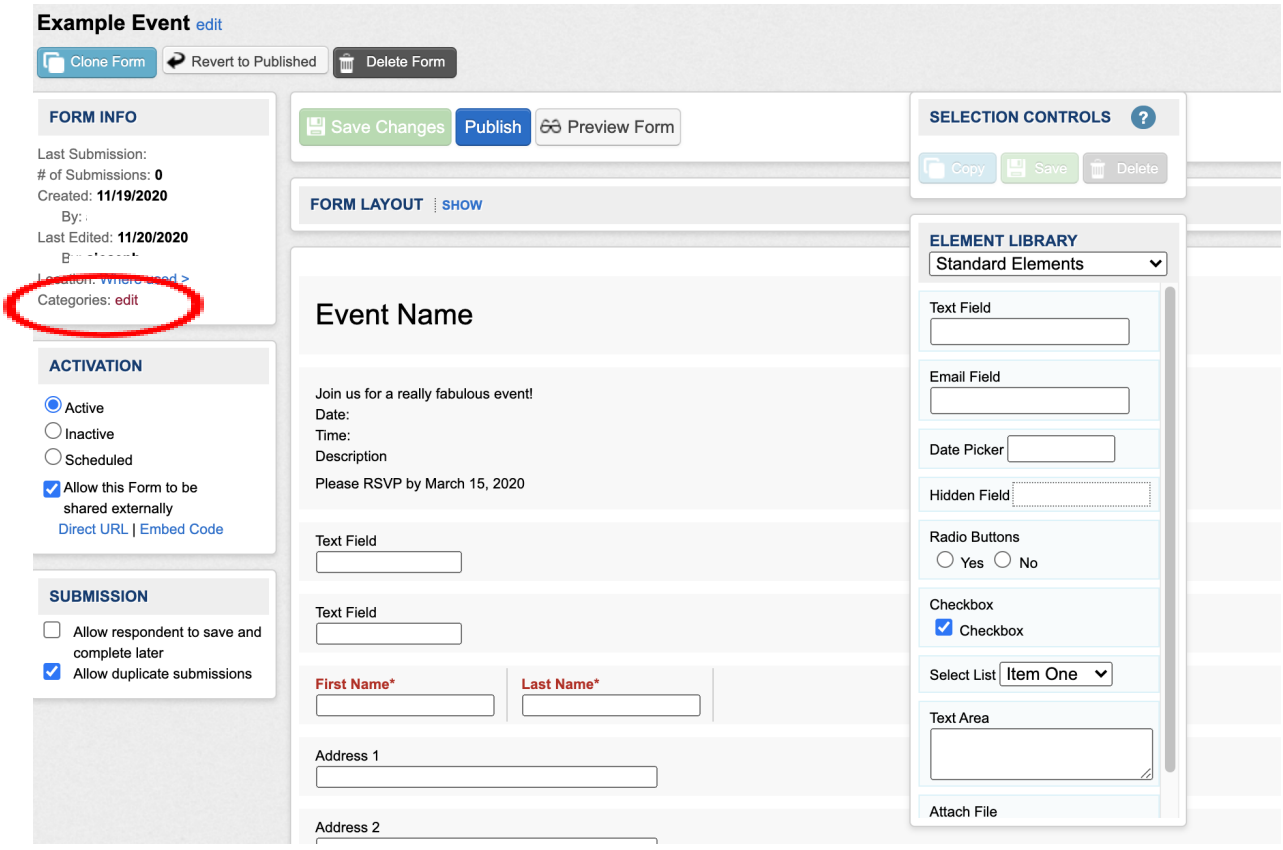
    Here are some important tips:

a. Include your group name in the form name along with a title that clearly identifies what the form is for.

b. Since forms for all groups can be accessed, please take care to ensure you are editing and cloning only your own group's forms.

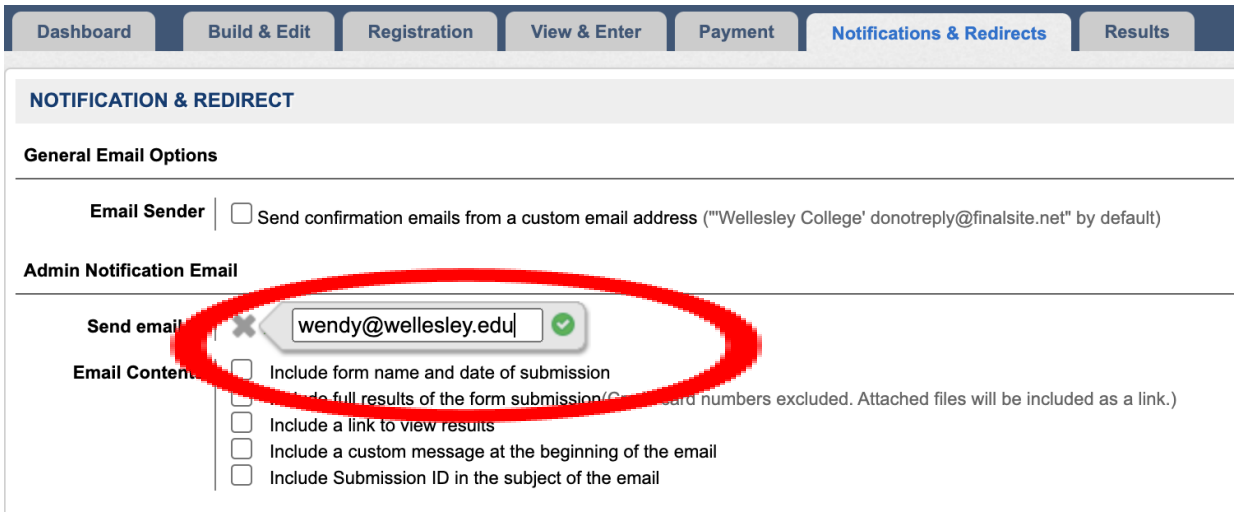
c. You can search by form name using the search field on the top left bar. You can also search by Category (see below to add that information to new and existing forms), which will display only your group's forms.

d. When creating the form, select your group as a Category, which will then allow you to filter just your forms by using the Categories Search. To add a Category, select "edit" next to Categories in the Form Info area on the top left. Once you select edit, a list of groups will appear and you can check off your group.

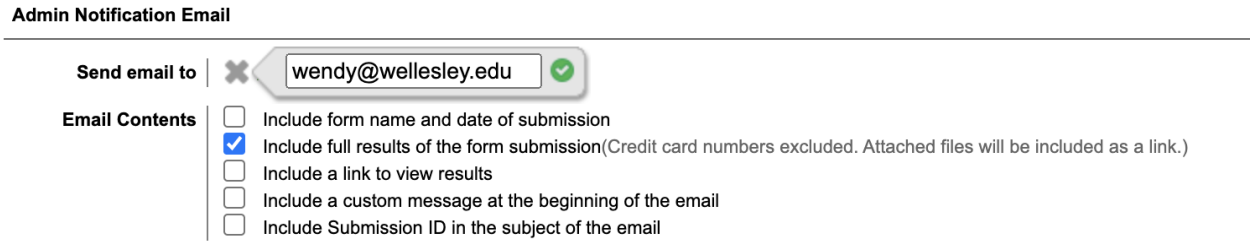


13. Now it is time to set notifications and redirects. Click on the Notifications and Redirects tab.

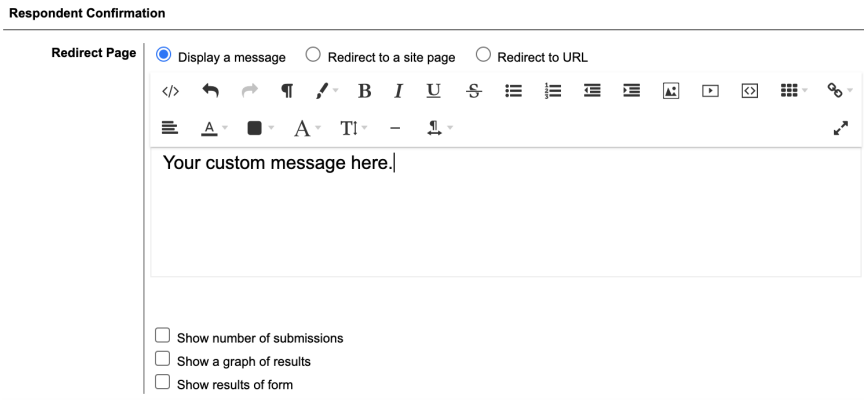
14. Decide which people need to be notified of any submissions to the form. Add their email addresses under the “Send Email to” section and click the green check mark when done.



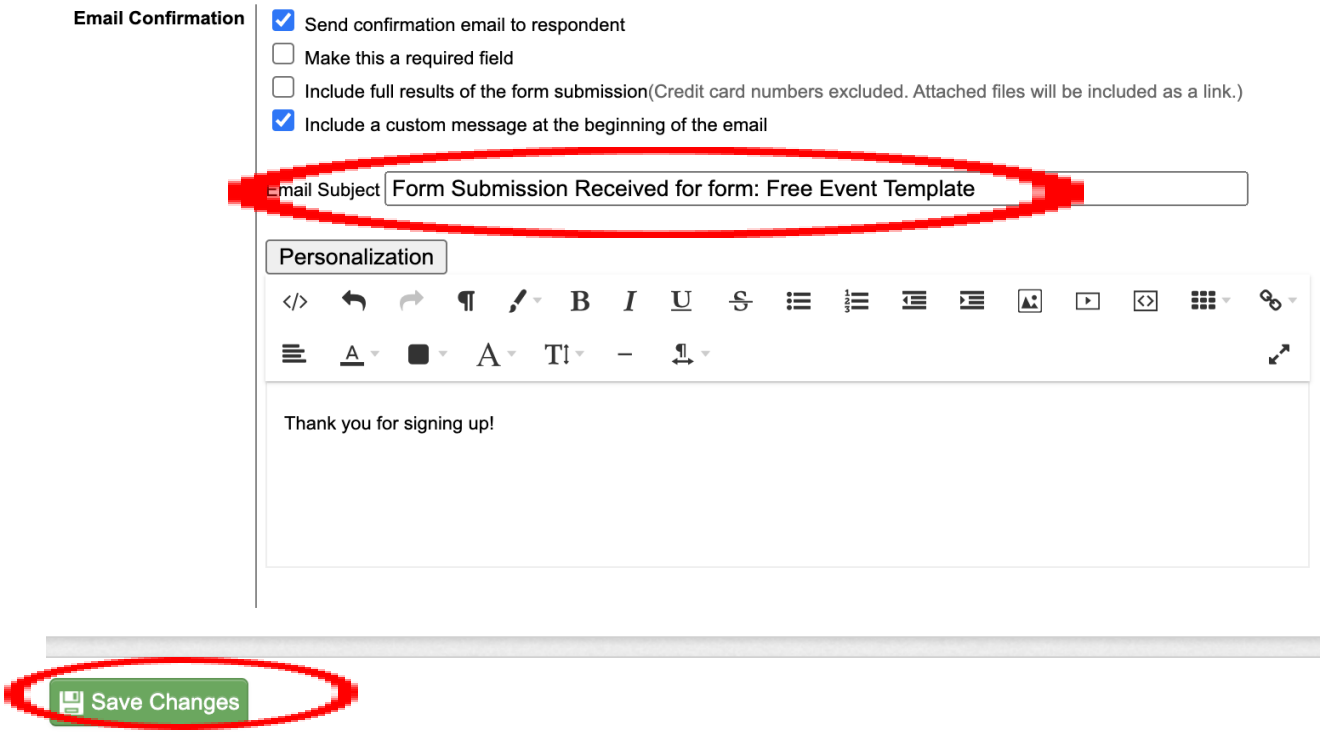
15. Make sure that “Include full results of the form submission” is checked



16. You can now set the message that is displayed when someone submits the form. Type in your custom message in the box. Highlight the text and select a bigger font-size so that it is sure to be seen.



17. The last step is to compose your email confirmation text. Customize your subject field and type an email message to your attendees letting them know you received the submission. Click save changes when you are done.

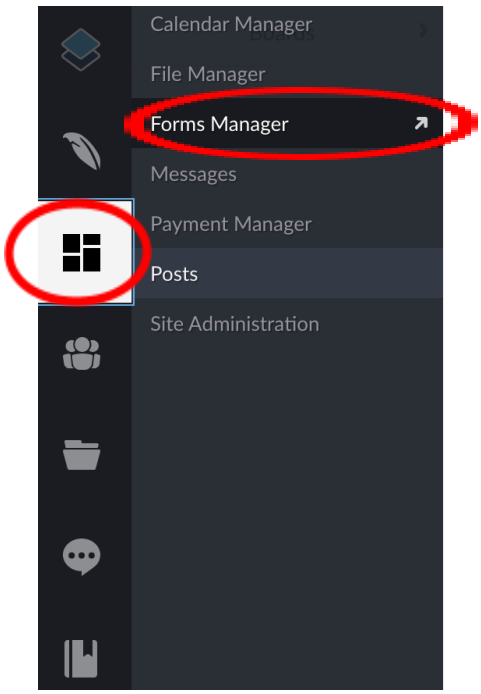


18. Now you are ready to put the form on your website. See the section about WebPage Content for these instructions.

TRACKING RSVPs

Great news! You've gotten a few submissions to your event registration form. Let's take a look.

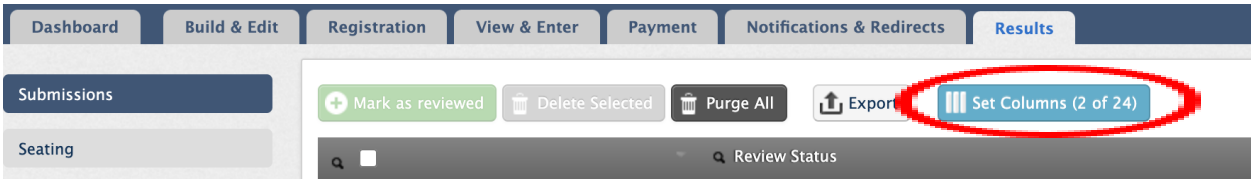
1. Navigate back to the Forms Manager from the waffle menu.



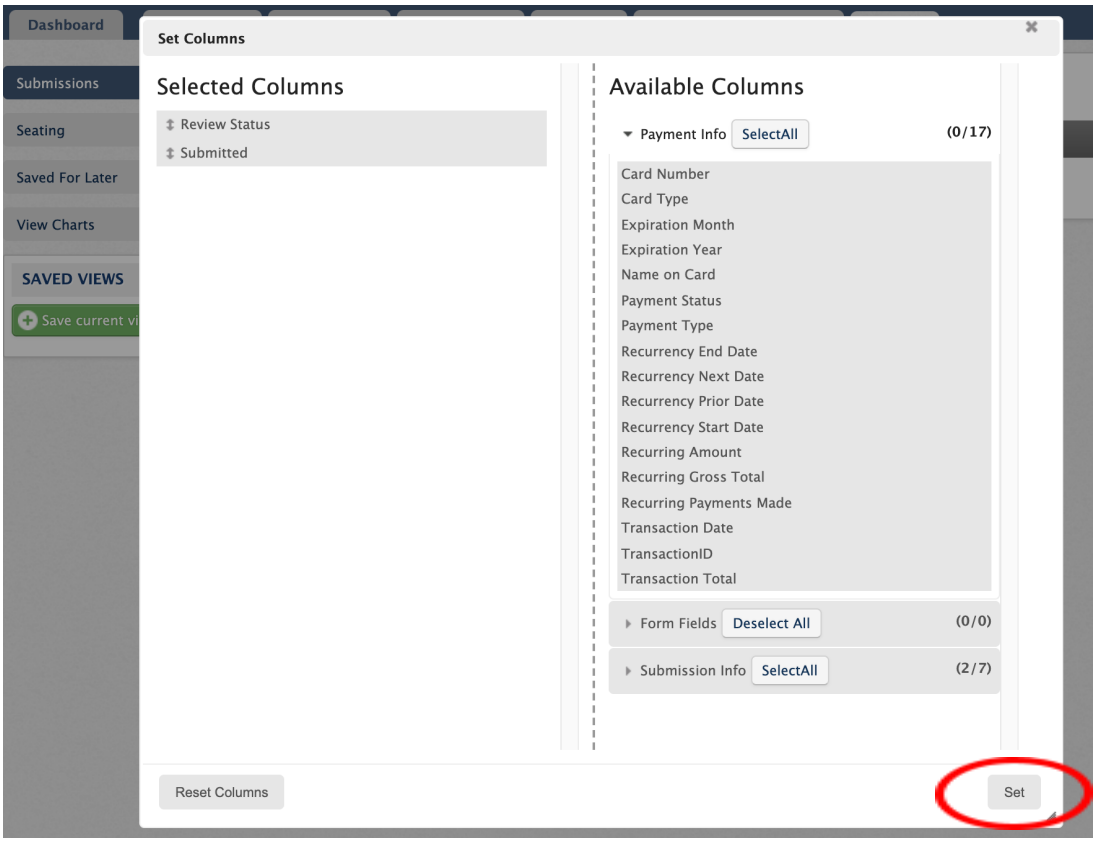
2. Click on your form.

3. Click the last tab (the "Results" tab), and see the submissions. You may notice the information you asked for is showing up here. That is because the module allows you to customize exactly what you see.

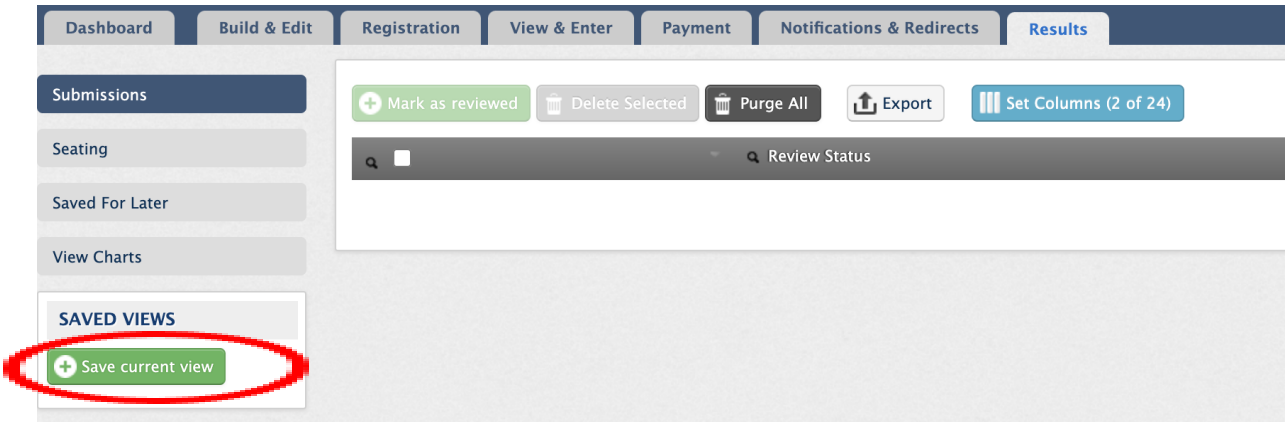
4. Click the blue "Set Columns" button. Here is where you can really customize your view of the results. You can easily select every field collected to show on your report or just some. You can add a column to the Results tab that gives you the status of the transaction. You can do this by going to Set Columns and choosing which ones you would like displayed from the right side. Once you click on them they will be added to the left hand column and then you can select Set at the bottom right. Please note that any changes you make to your columns will only be visible to you. Other admins will need to set up their own Results tab columns.



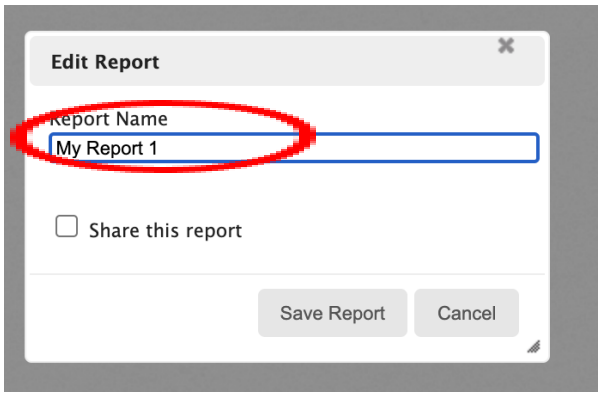
5. Once you are satisfied that you are seeing all the information you need, click the button that says "Set."



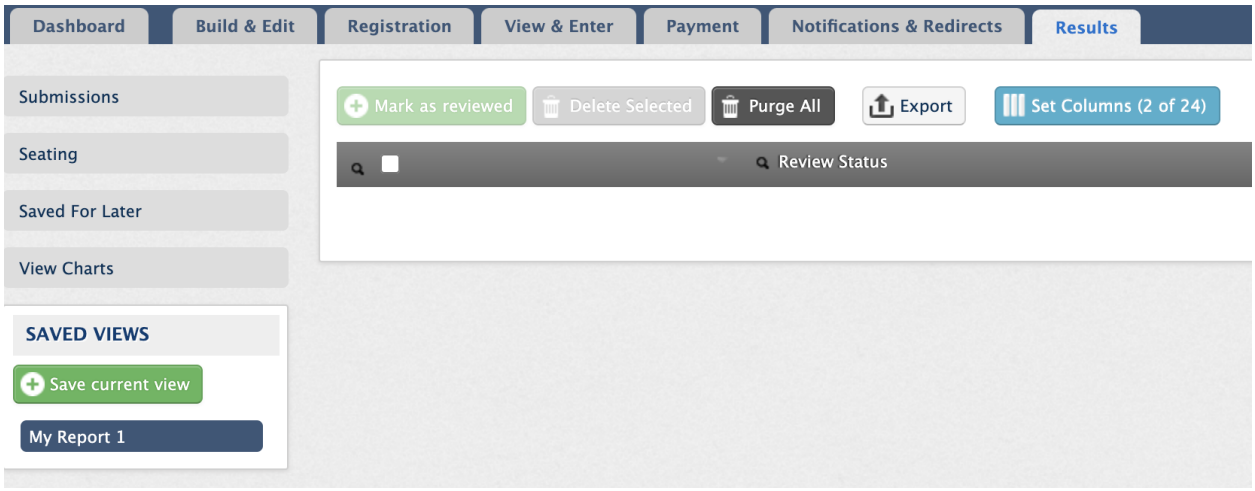
6. Then move to the left side of the your screen and click on the button that says "Save Current View." '



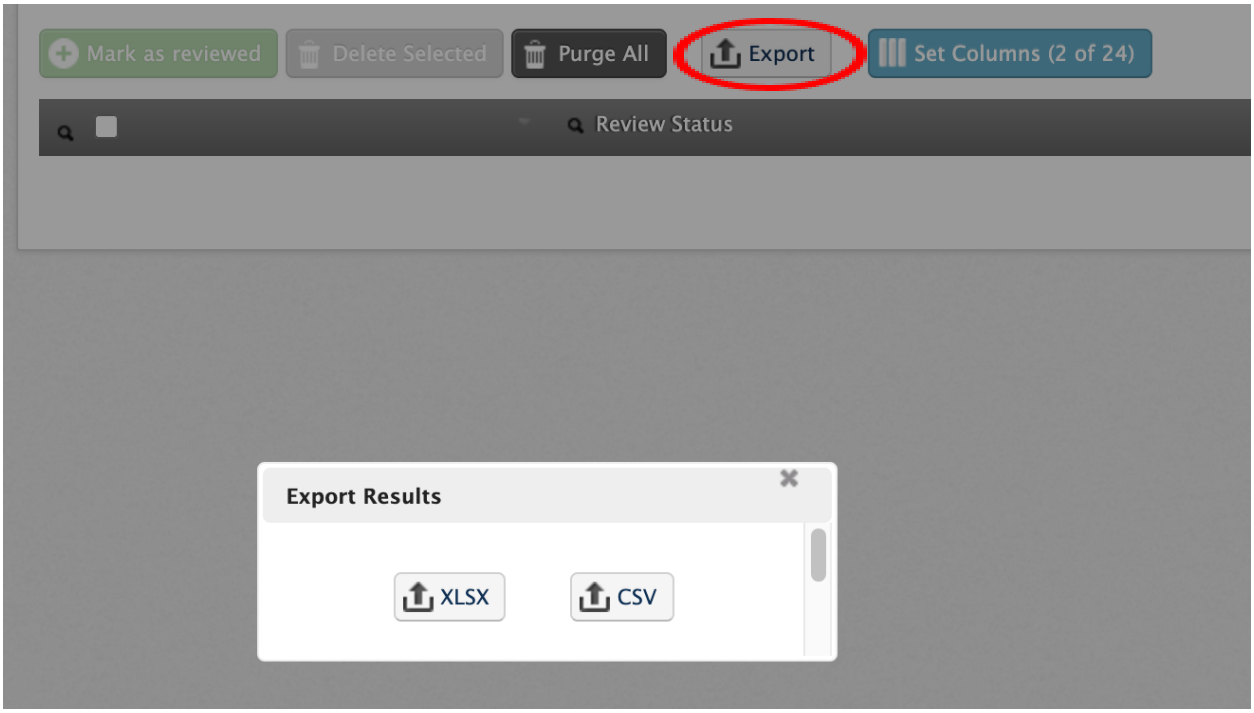
7. Then Name the report.



8. The next time you come in to check on the results you can click on the save view link to see the already optimized view.



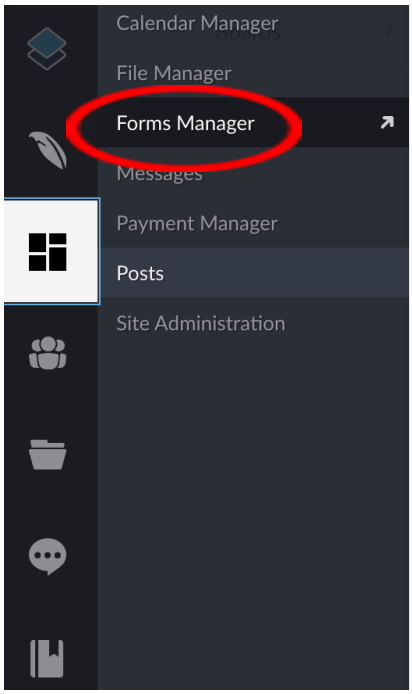
9. You can also use the export button to export the results into several different file formats.



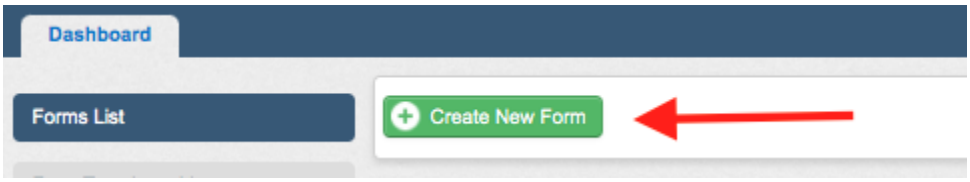
10. You also open each submission and print it or save it as a PDF.

CREATING A FORM WITH PAYMENT

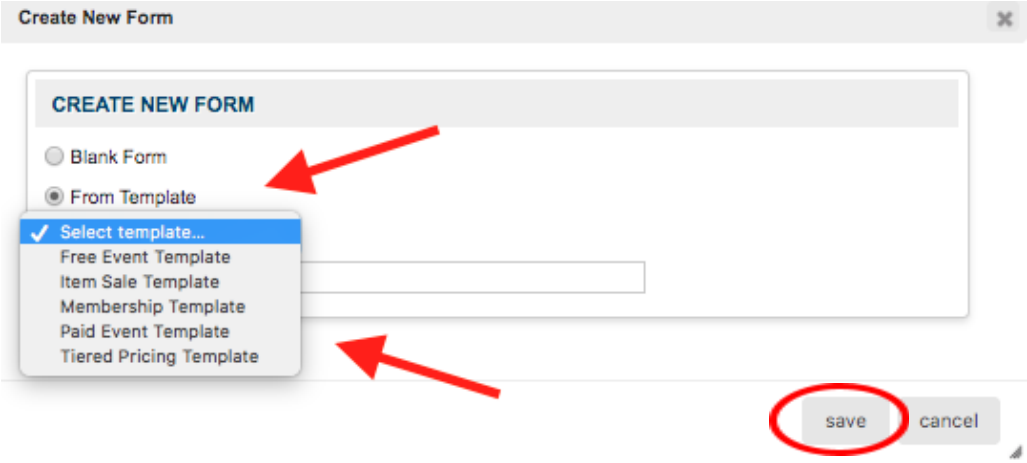
1. Go to the Waffle menu and select Forms Manager



2. Click on Create New Form



3. A new pop-up window will appear where you can choose the type of form that you need and name your form. Once you do this, click save.

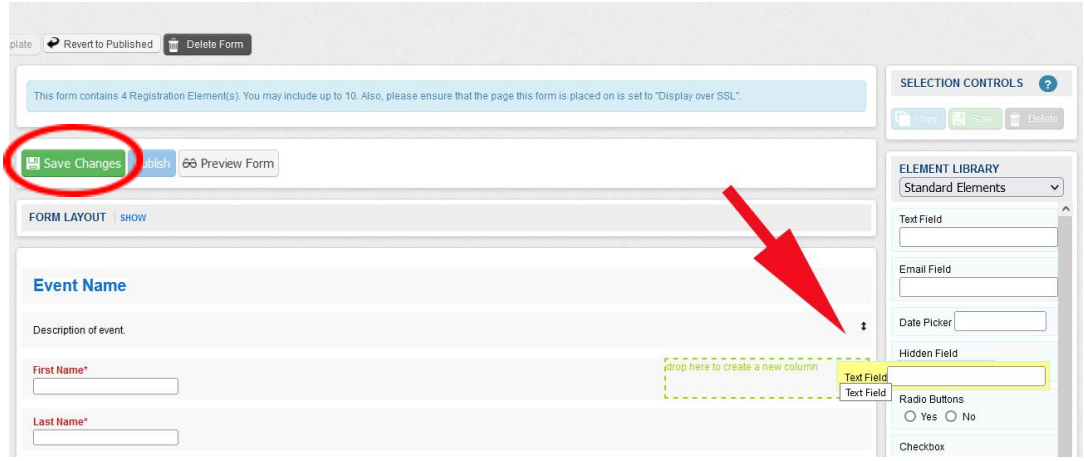


4. Give your new form a unique name which includes your class, club or SIG name and click save to create your form.

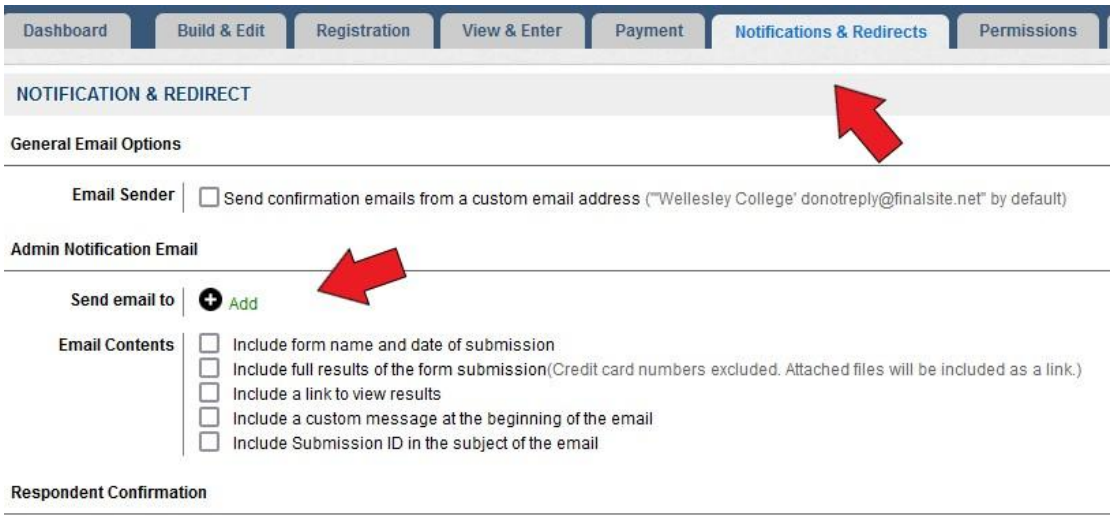
5. If you hover over any of the form fields the pen or delete option will pop up. Choose the pen option to edit the field.

6. A box will appear where you can add and edit text. If there are fields that you do not need, just hover over them and choose the trash can to delete. Once you are done, select the green save button at the top left.

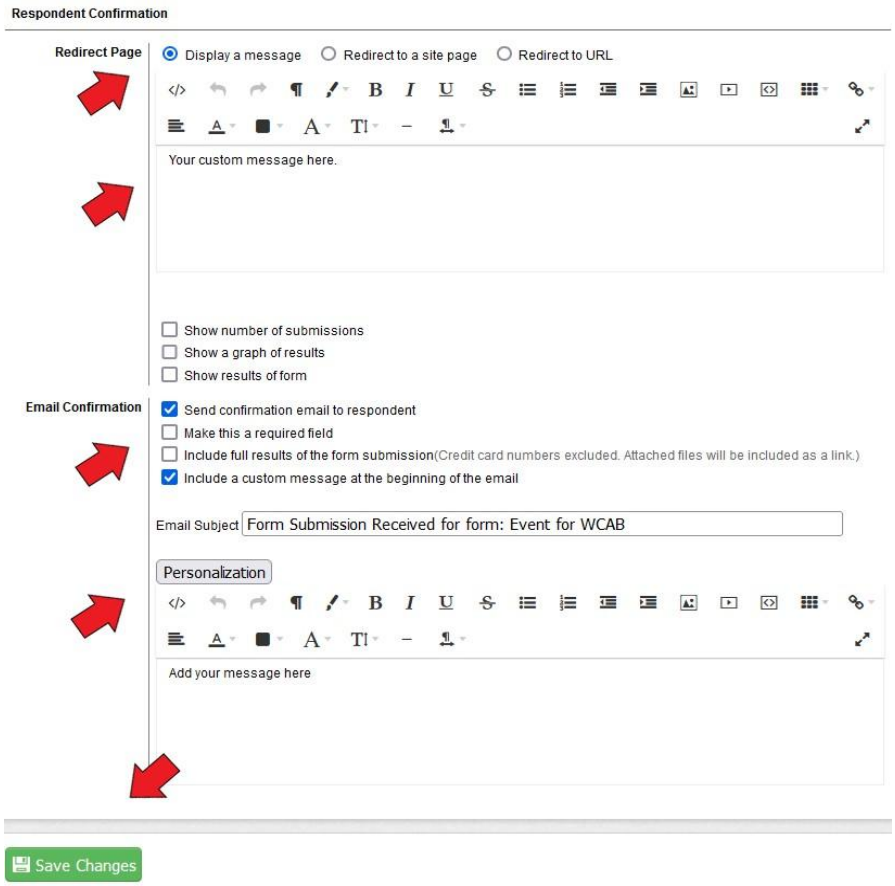
7. If you need to add a field just go over to the right hand side under Element Library and choose the type of field you want by dragging it to the right of the field you want it next to or beneath/on top of the field for a new line. Save and Publish your form.



8. Next, go to the Notification & Redirects tab. Click on the + symbol to add the email addresses that you would like to get notified of any transactions from this form. The green checkmark will save your additions. Make sure to check “Include full results” on the form submission.

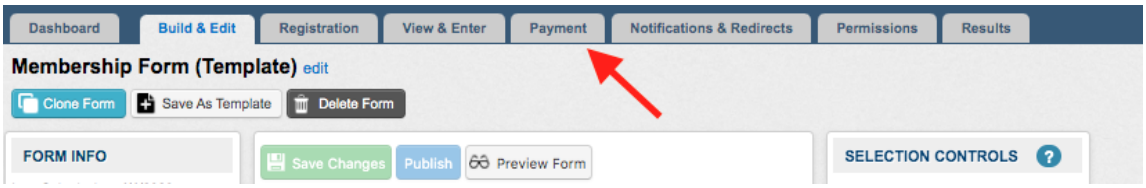


9. This is where we set the message that is displayed when someone submits a form. Choose Display a message and then type in your message below. You can do the same for the email confirmation as well. Click Save Changes when you are done.

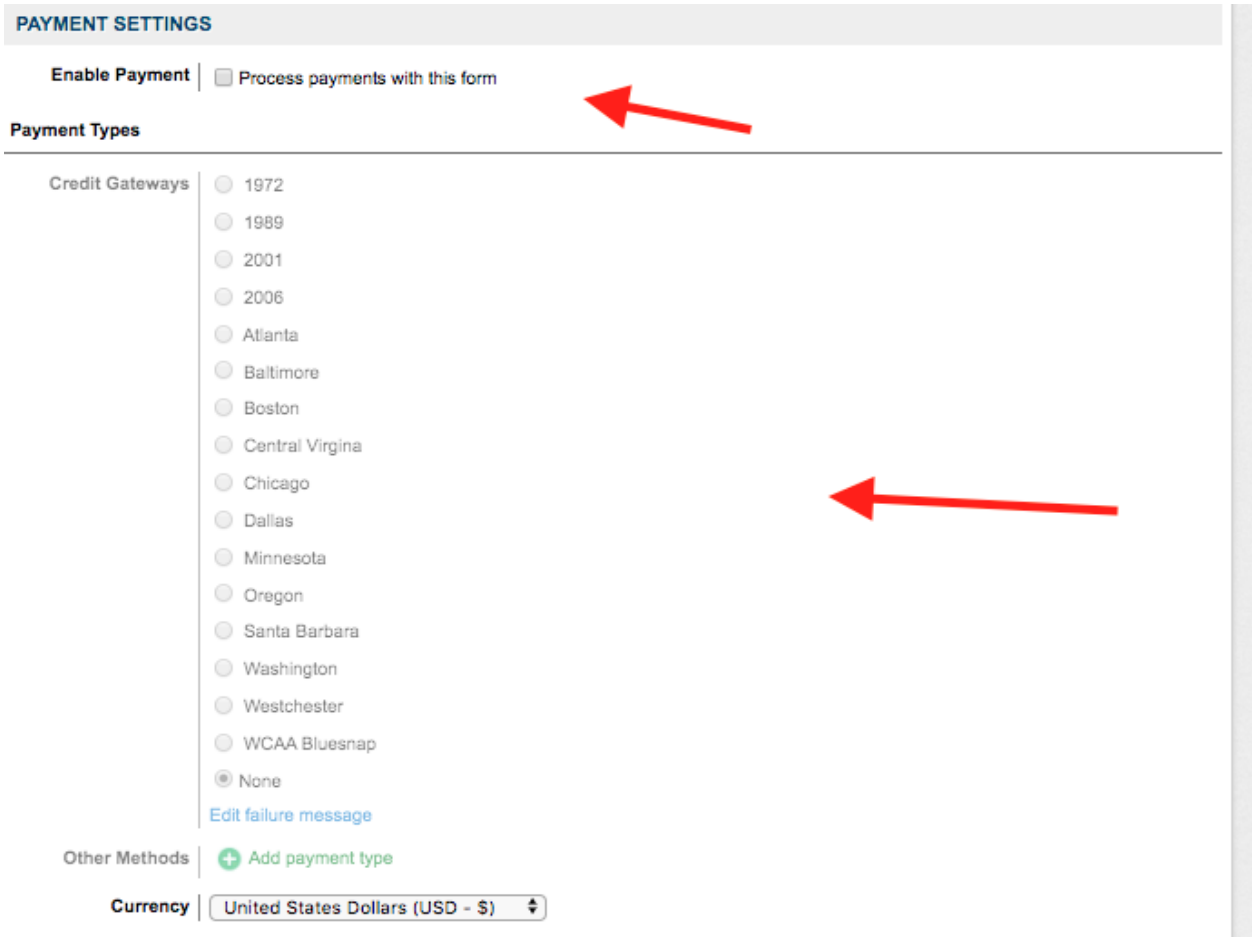


10. [Please return to the Event Registrations section to learn how to edit the form and add fields.]

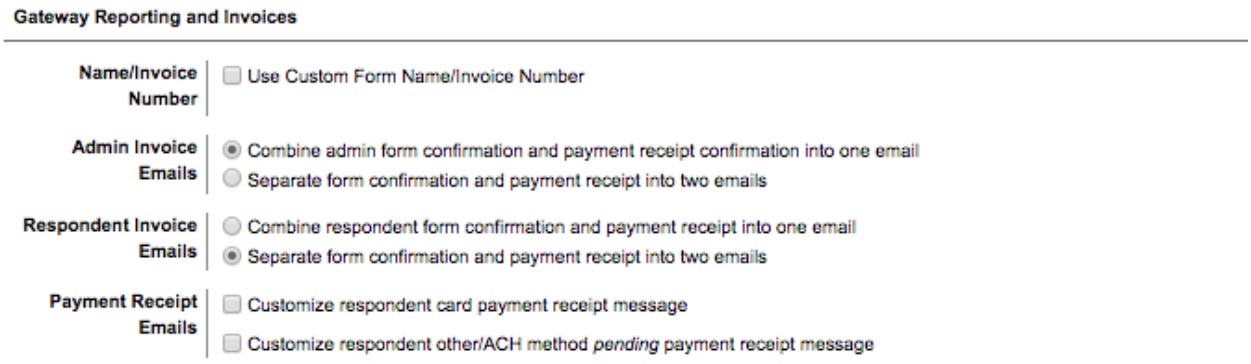
11. Select the Payment tab



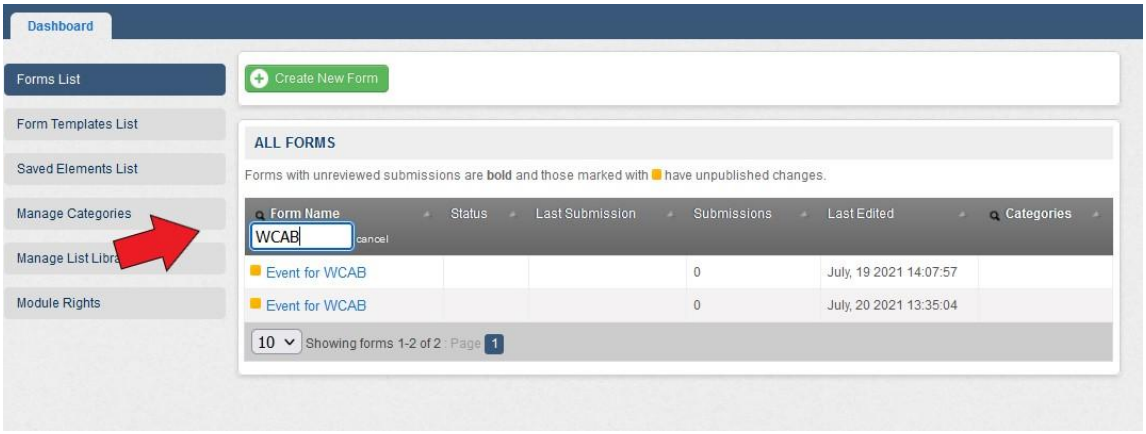
12. Check the "Process payments with this form" box. Then select your group's name. **Please note you cannot process any payments if your group name is not available here, as your group is not set up with Bluesnap. This process is changing in the Fall of 2021 and in this interim period no new BlueSnap accounts should be established.**



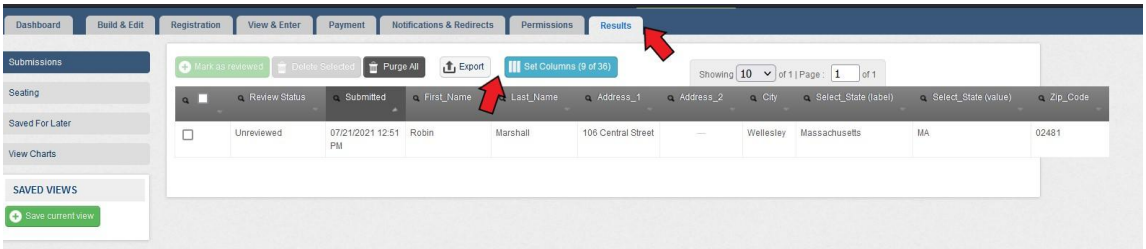
13. Select how you want to receive the notifications and send notifications.



14. To track your RSVPs go back to the Form Manager and find your form by going to the small magnifying glass under Form Name and typing in the title.

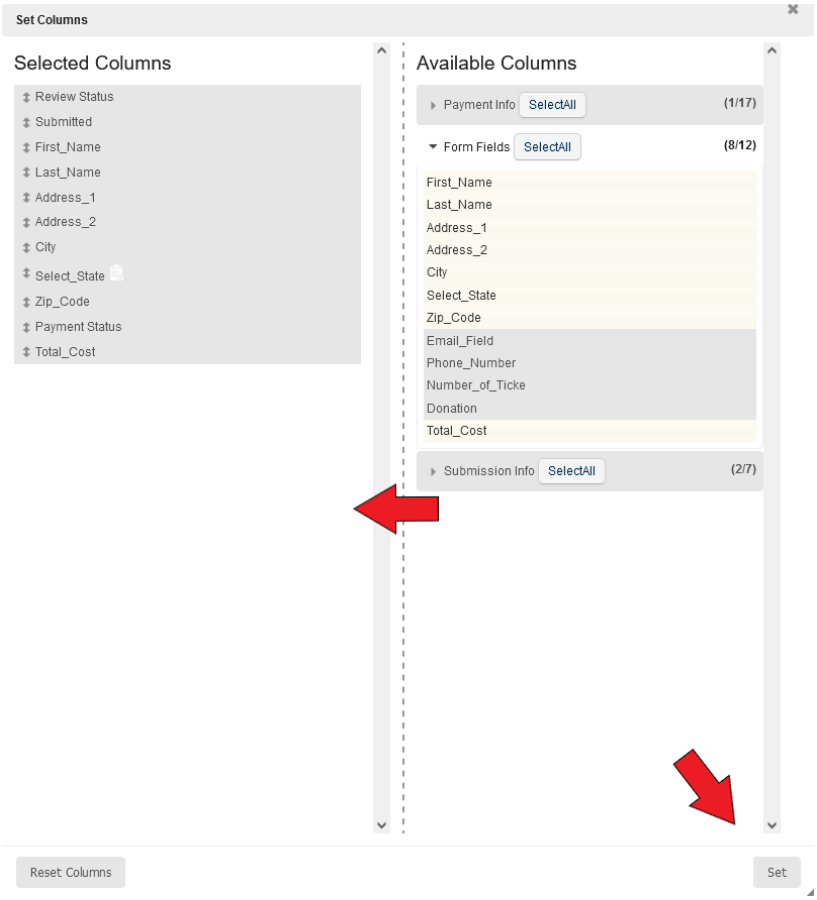


15. Once you have your form, click on the Results tab. This is the area where you will see all of the ticket purchases. You can customize your view by clicking on the blue Set Columns button.



16. Two columns that are helpful to have when you are reviewing your results are Total Cost (Under Form Fields) and Payment Status (under Payment Info).

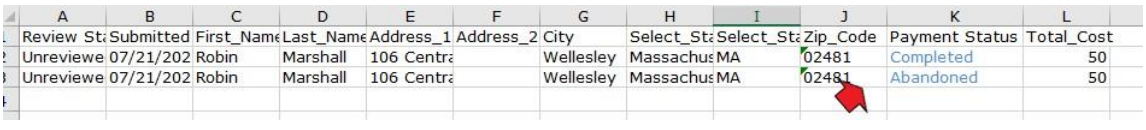
    The right hand side shows the Available Columns and the left shows the ones that are Selected.



17. If you click on a column from the right it will be moved to the left. You must choose the Set button on the bottom right when you are done. **Please note** that these choices will only show up on **your** view of the form results. Other administrators in your group accessing the form will need to set up their own view.

18. Once you add your custom columns you can go back up to the top and choose Export. A dialog box will open and you can pick either xlsx or csv for the format of the spreadsheet generated.

    If there were funds collected, the Payment Status and Total Cost columns you created will have information. Payment status will be Completed or Abandoned (the option was chosen on form, but the financial part of the transaction was not completed).



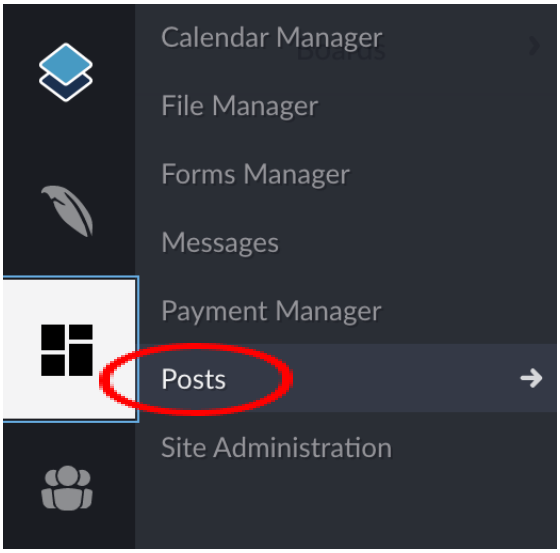
	A	B	C	D	E	F	G	H	I	J	K	L
1	Review Sta	Submitted	First_Name	Last_Name	Address_1	Address_2	City	Select_Sta	Select_Sta	Zip_Code	Payment Status	Total_Cost
2	Unreviewe	07/21/202	Robin	Marshall	106 Centra		Wellesley	Massachus	MA	02481	Completed	50
3	Unreviewe	07/21/202	Robin	Marshall	106 Centra		Wellesley	Massachus	MA	02481	Abandoned	50
4												

Editing Your Web Pages (Posts)

Rather than editing directly on the page, you will be entering content into a module called Posts. There is a location in the Posts module for each page or content area of your website.

EDITING EXISTING POSTS

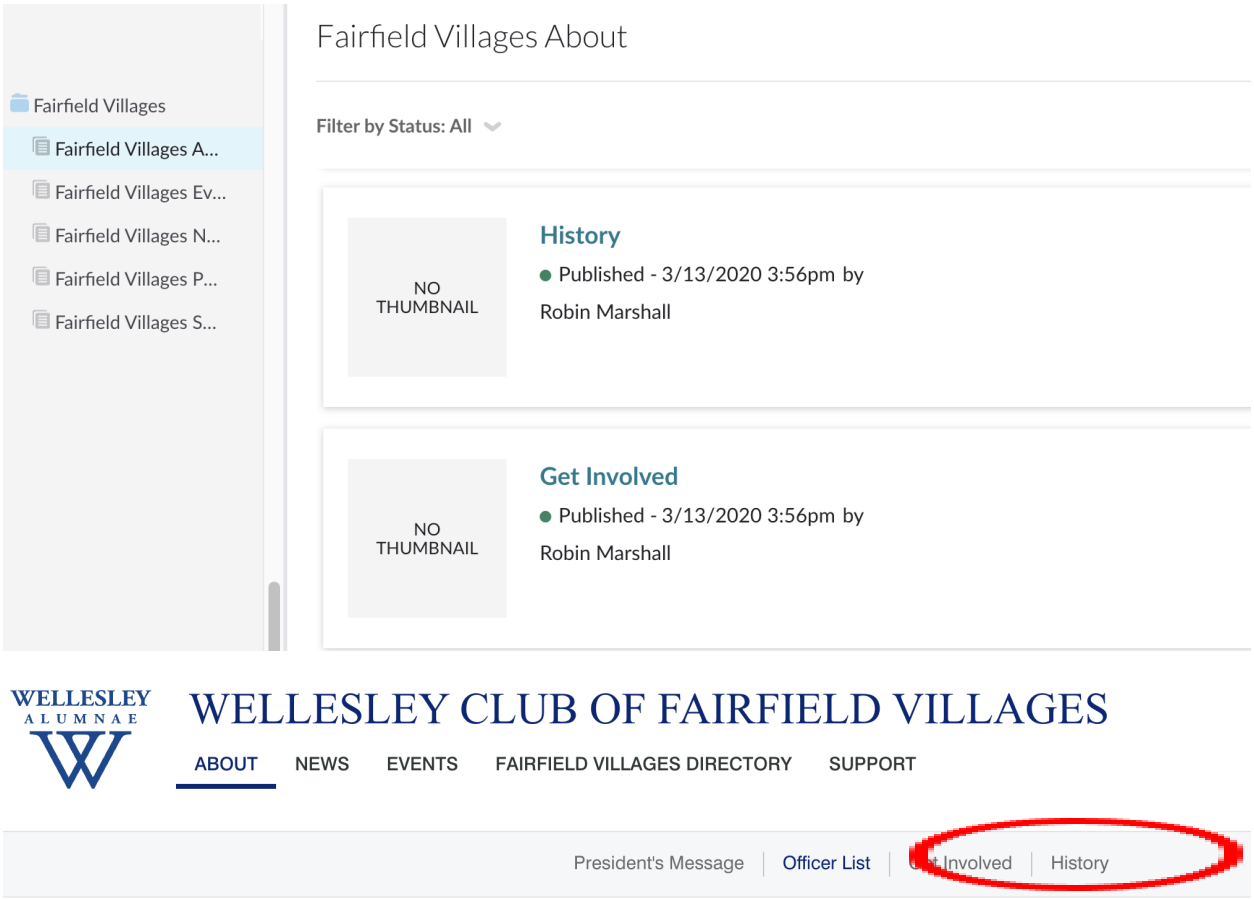
1. Access the Posts module by clicking on the Waffle menu.



2. You will see what is called a Board for each sub-page. Click on the board to see what is posted to it.

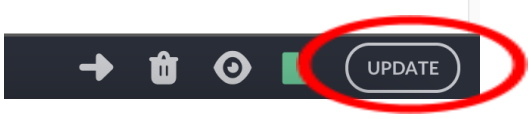
3. These boards correspond to the pages on your site

4. For example, each post under the “Fairfield Villages About” board is a subpage to that section.



5. Click on one of the posts. In a separate browser tab, navigate to the live page you want to edit. By toggling between the live page and the post in the admin site you will see they have the same content.

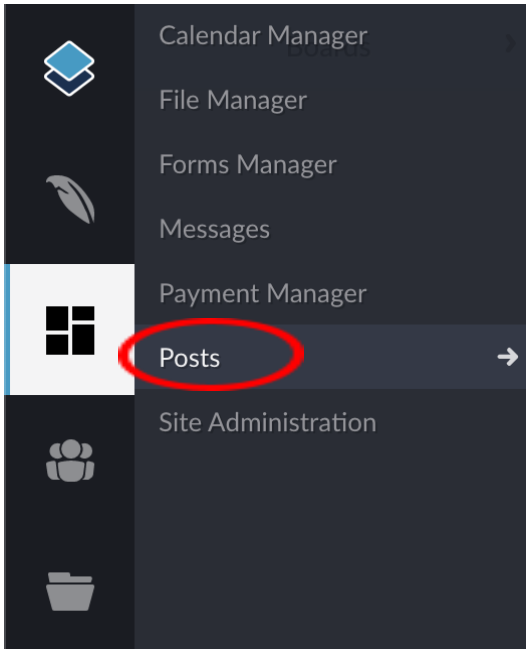
6. Make your desired changes to the post. Once you click the button “Update” in the bottom right hand corner, the changes will be live. You can view the changes by refreshing the page.



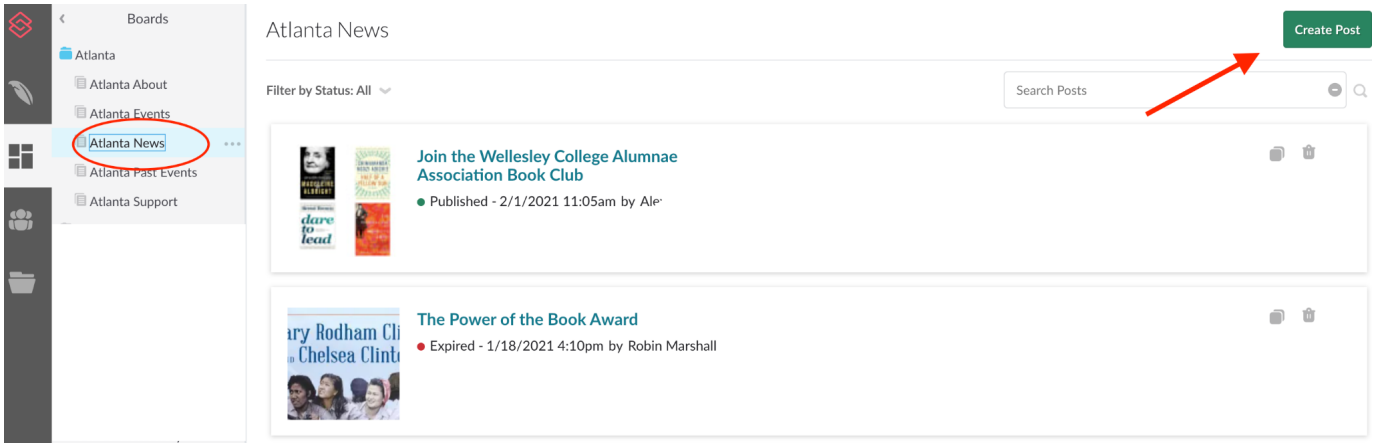
CREATE A NEW POST IN "NEWS"

This process differs when you want to edit something under the "News" section. In this case, you want to keep the archive of past news/events. Instead of editing what is there you will create new content posts.

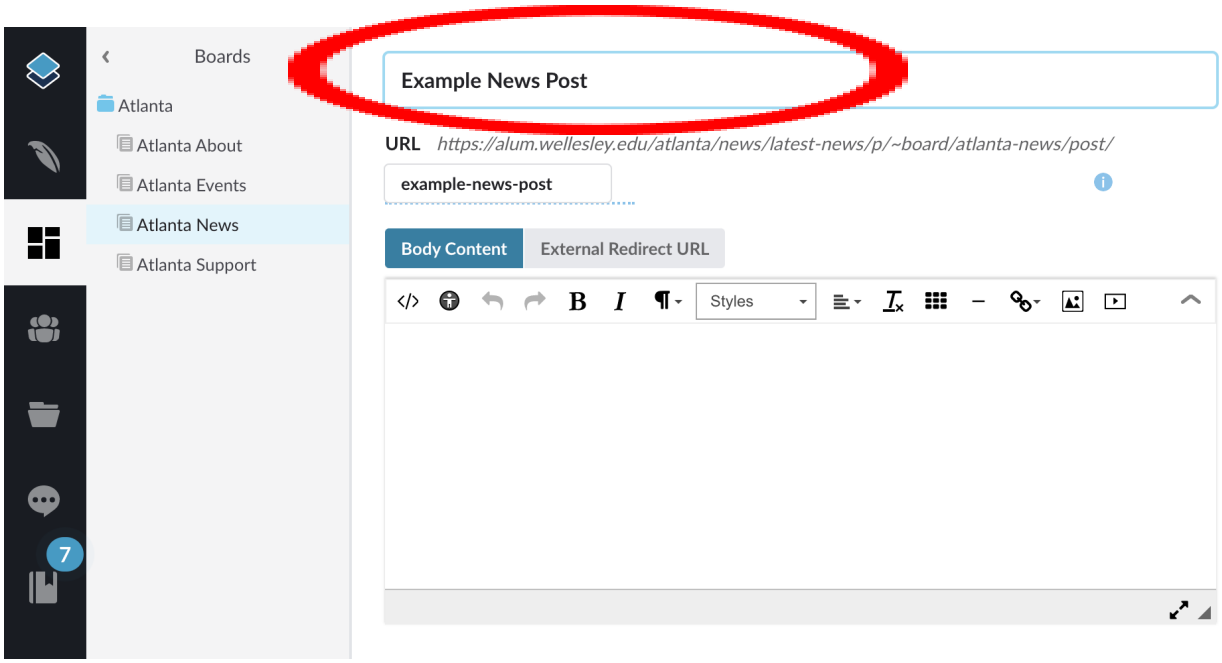
1. Click on the Waffle icon and click on the tab that says "Post"



2. Click on the News Board and then Create post on the top right hand corner

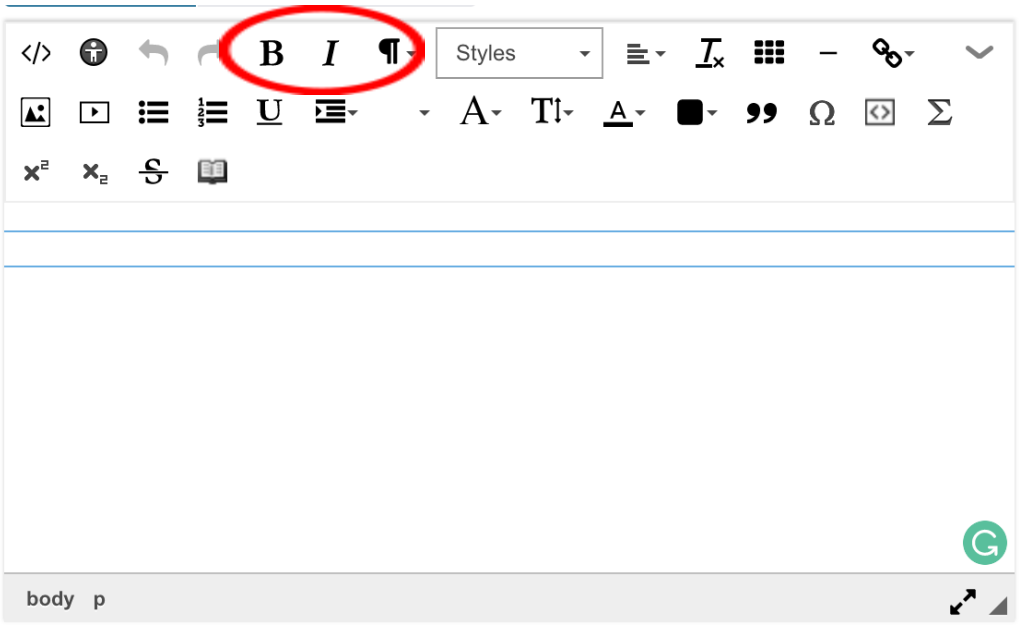


3. Enter a title for your News post

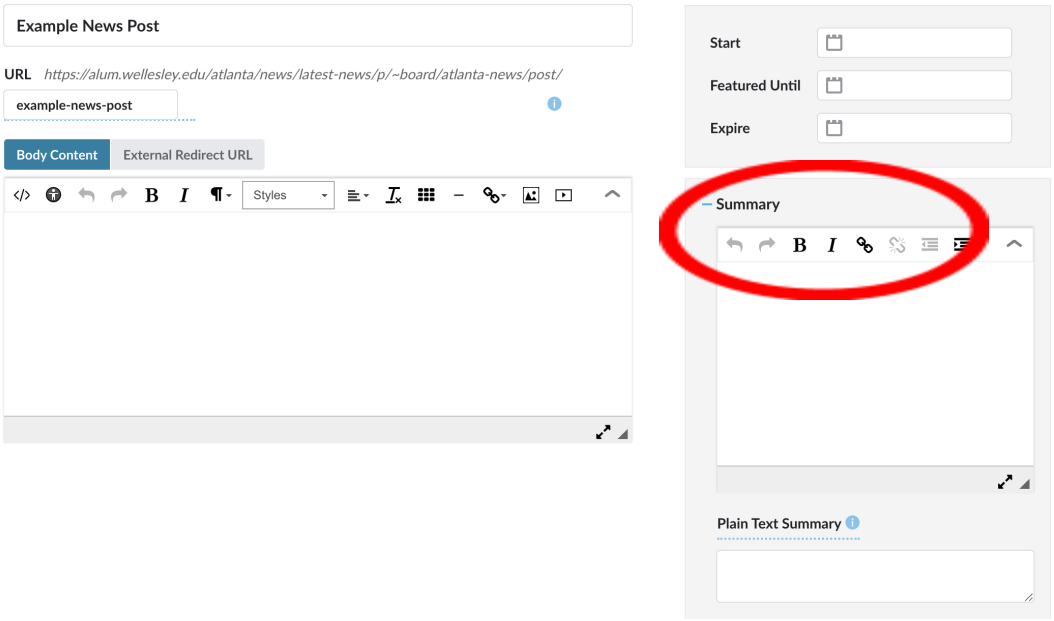


4. Enter the text/body content.

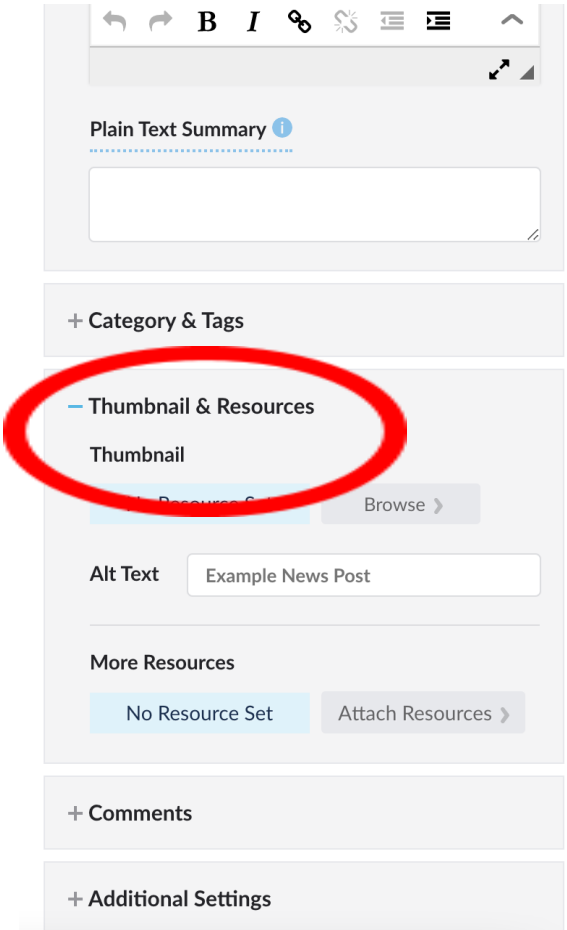
5. You can add formatting such as links, bolds, and italics to your text by clicking on the icons on the bar above the body content box.



6. Enter a short summary of the content in the summary field.



7. Add a thumbnail image (may require scrolling down.)

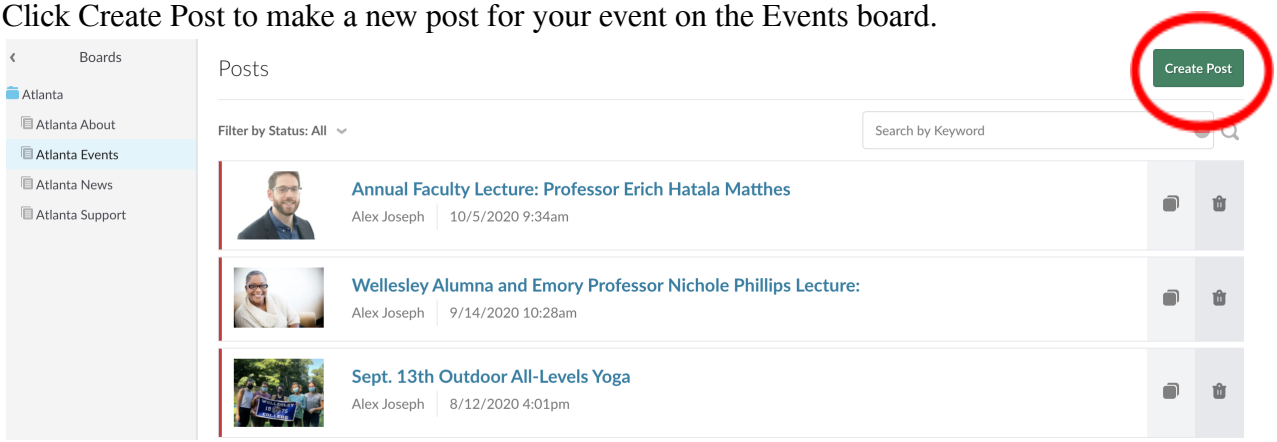


8. Click: SAVE and publish immediately.

9. Once published, a News post will appear on the home page and on the subpage called “News”

EVENT POSTS

1. Click Create Post to make a new post for your event on the Events board.

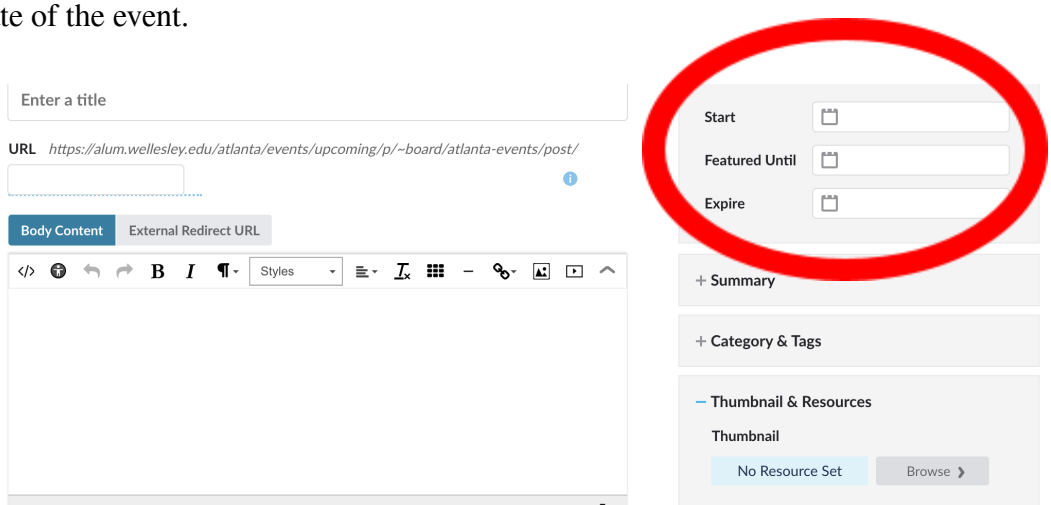


2. Enter a title.

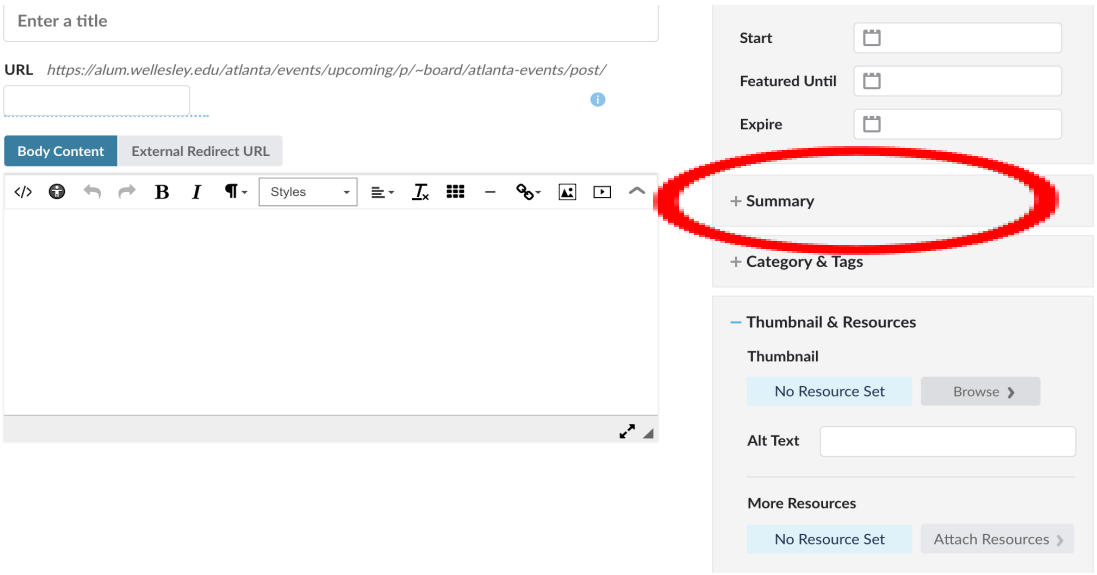
3. Enter the event details. You can use headings and other styles. By clicking on the arrow, see below, you can expand the options available.

4. Add a thumbnail image. Have the image ready and you can add it by clicking on the green “Public Resource” button.

5. If you want this event to appear on your homepage, be sure to add an end date where it says “Featured Until.” You could make the end date the last date registration will be open, or even the date of the event.



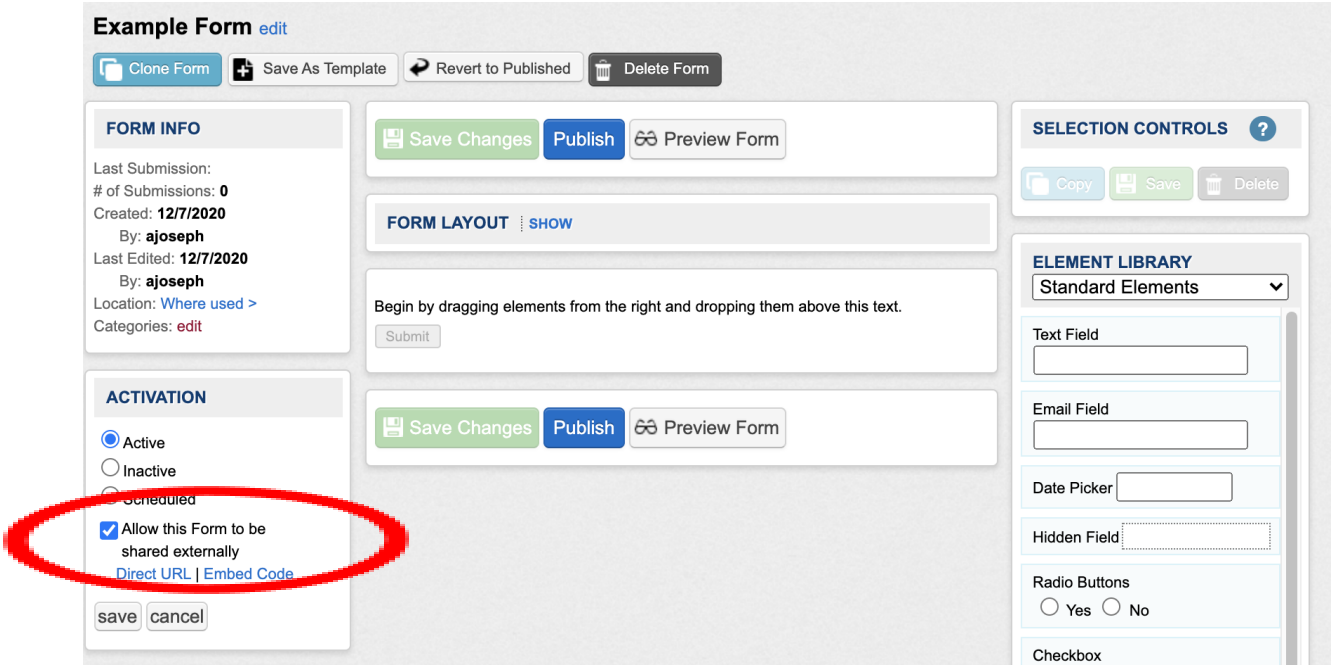
6. Make sure to enter a short summary or call to action in the summary field, because this will populate on the homepage.



ADD A LINK TO A REGISTRATION FORM

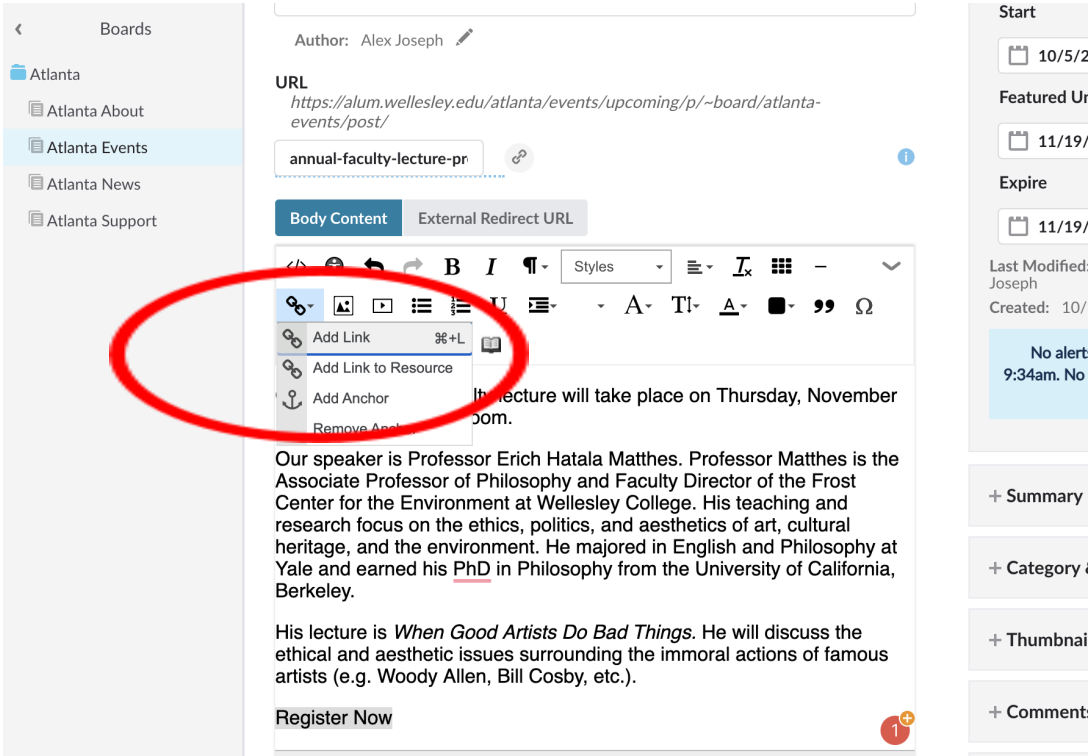
1. Navigate over to the Forms Manager module under the Waffle Menu.

2. Find your event and copy the link to your event by clicking on the link that says “Direct URL.”



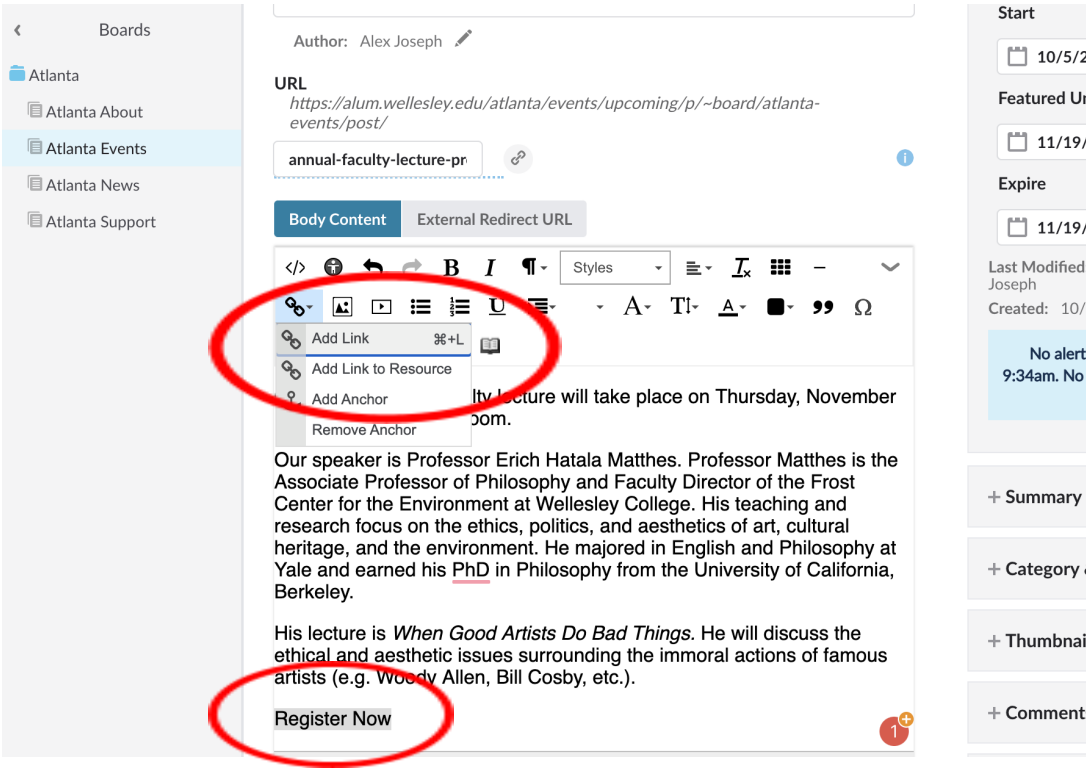
3. Toggle back to the event you created in the Posts module and at the end of your document type the text you'd like linked- for example, "RSVP Here" or "Register Now."

4. Highlight the text and click on the link icon so you can add the link to your event to the text.

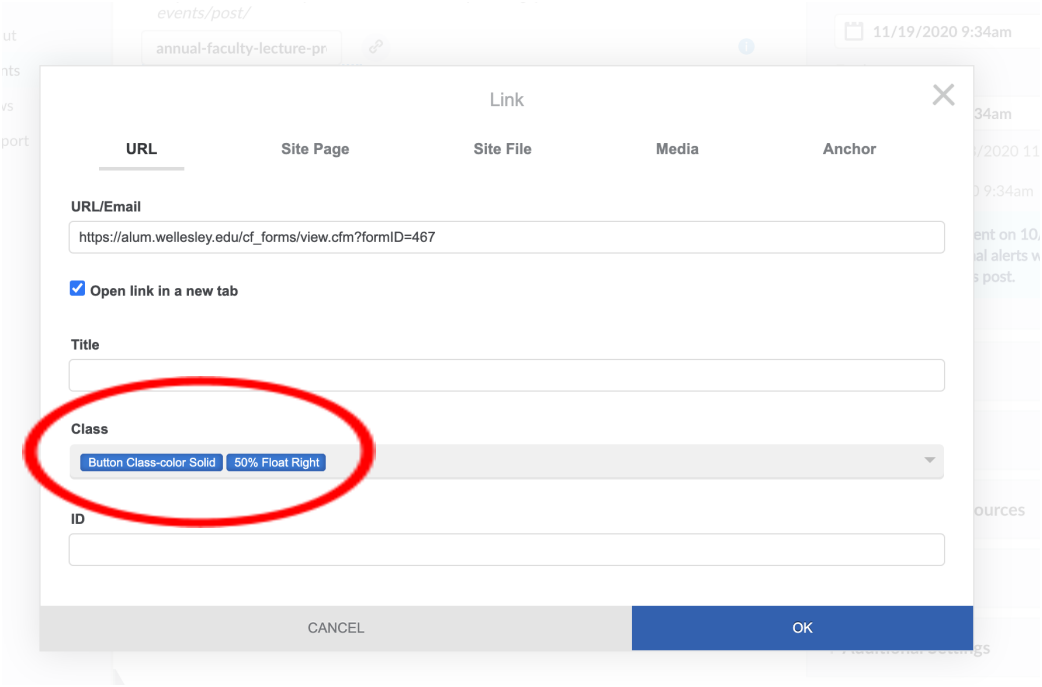


ADD A BUTTON STYLE

1. Highlight the text that you want to link your event to and click the link icon.



2. Choose which button settings you want.



3. Click save to make the post live immediately.

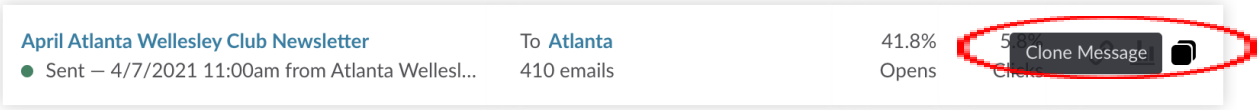
4. View the event from the homepage and you will see your button.

Sending Emails via Messages Module

To create an email to go to your group, you can clone a previous message and adapt the content, or create a new message by using a template. Directions for both options are included here, followed by instructions on how to send the message.

CLONING AN EXISTING EMAIL

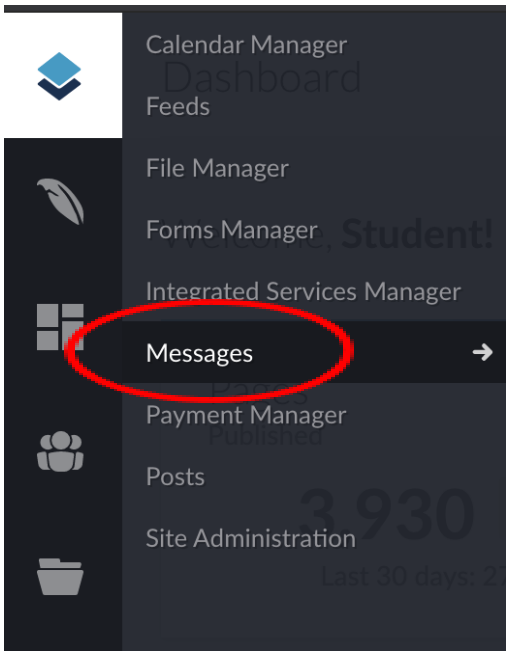
1. Click on the Clone icon (overlapping squares) of the message you want to clone.



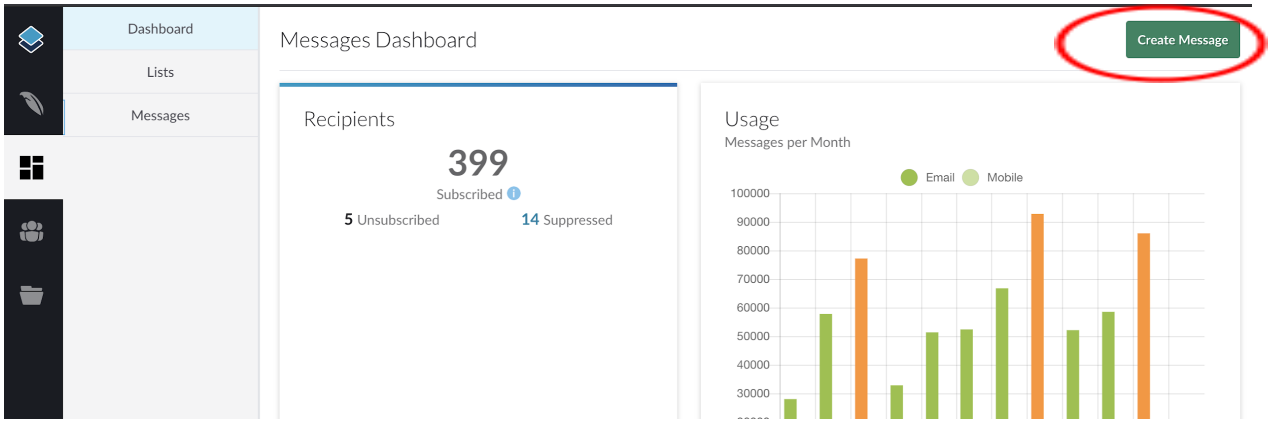
2. Click “Clone Message” and edit your new message to your liking (look at instructions under Using a Template step #5 for making changes).

USING A TEMPLATE

1. Navigate to the Messages module in the Waffle menu.

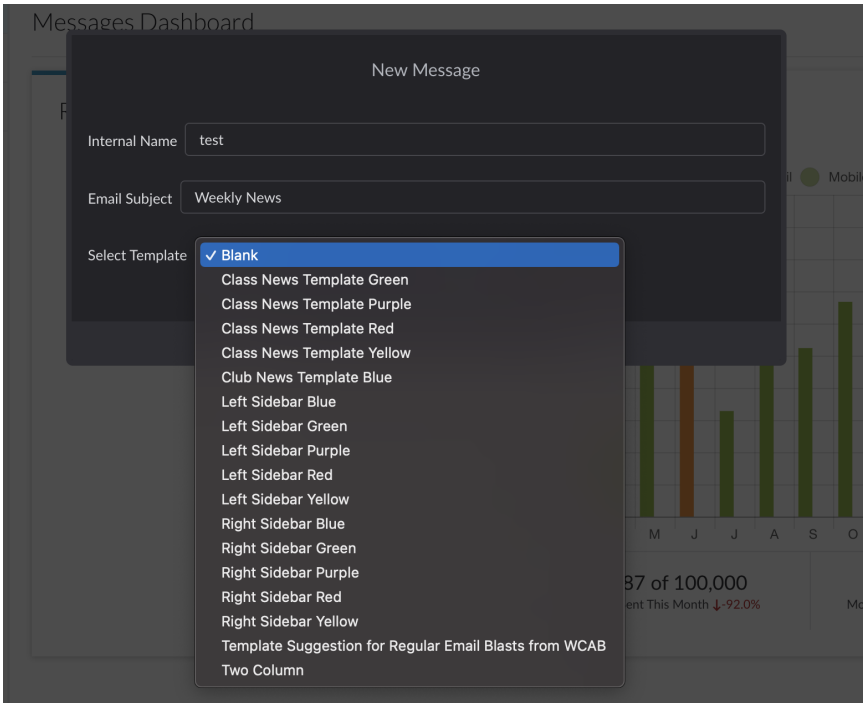


2. Click the green button that says “Create Message” in the top right corner.



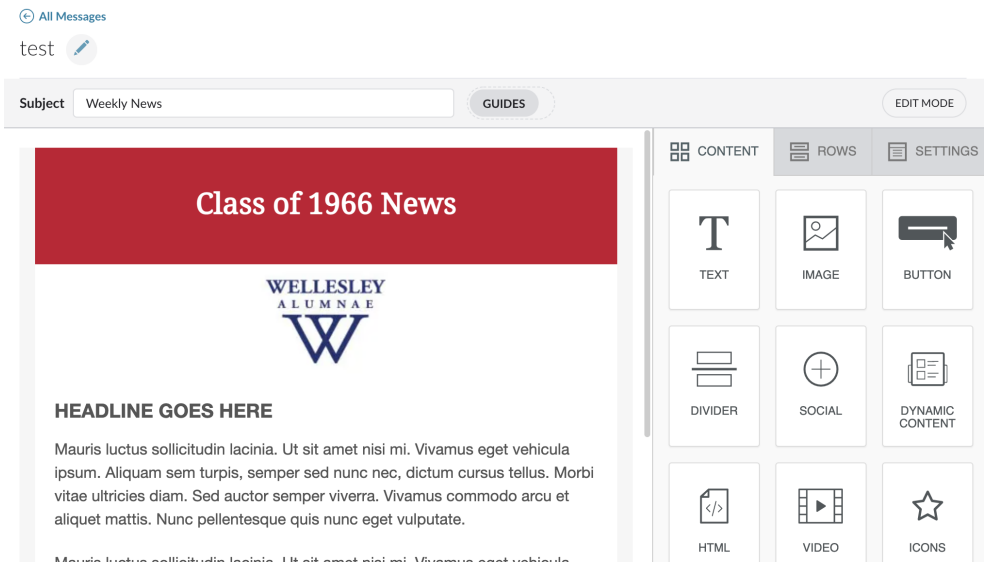
3. Fill out an internal name for the email, the email subject line, and a template from the Select Template drop down menu.

    - You will only be able to access messages for your own group. We encourage you to experiment with the layout of your emails by incorporating different types of content elements (for example text, image, button etc. - see the screen captures in Steps 5 and 7 that shows all options). Once you have a format you like, you can clone that Message for future sends.

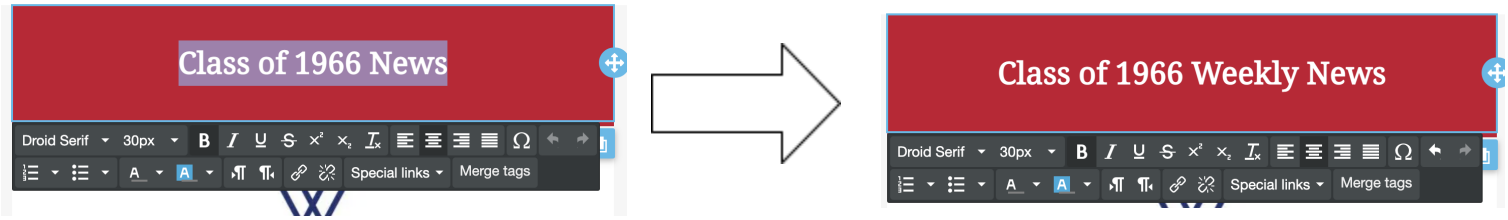


4. Click Next when you are finished.

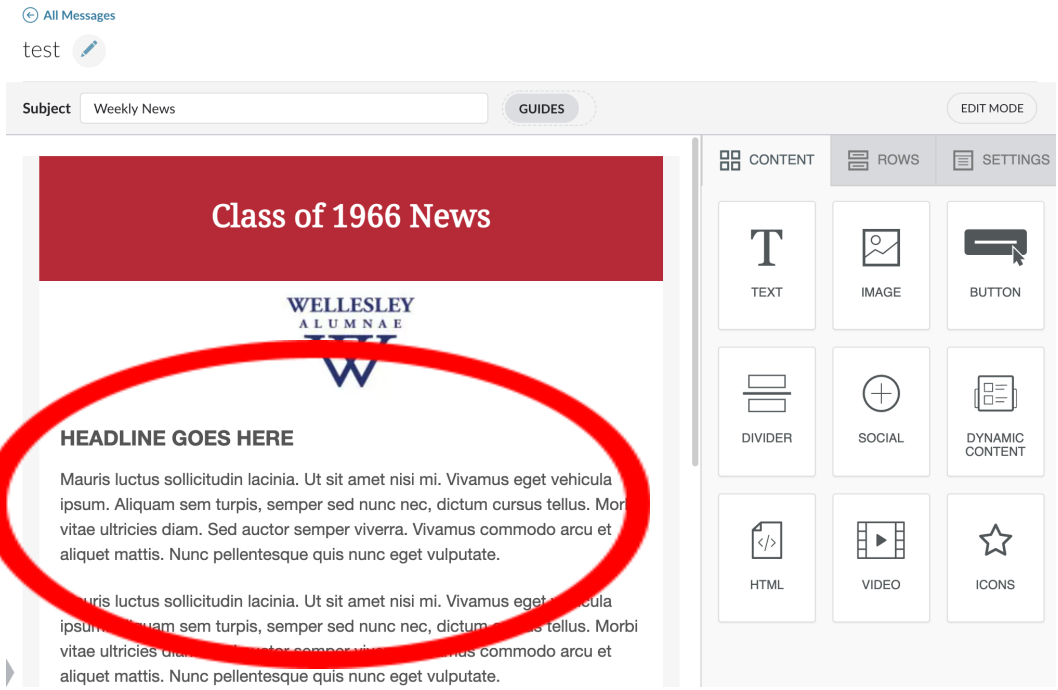
5. From here you can decide if this layout meets your needs or if you would like to make some changes. The next steps highlight the type of adjustments you can make.



6. The header is editable. You can make changes to it by highlighting the text and making an update. As you can see in the images below, the header changed from “Class of 1966 News” to “Class of 1966 Weekly News.”



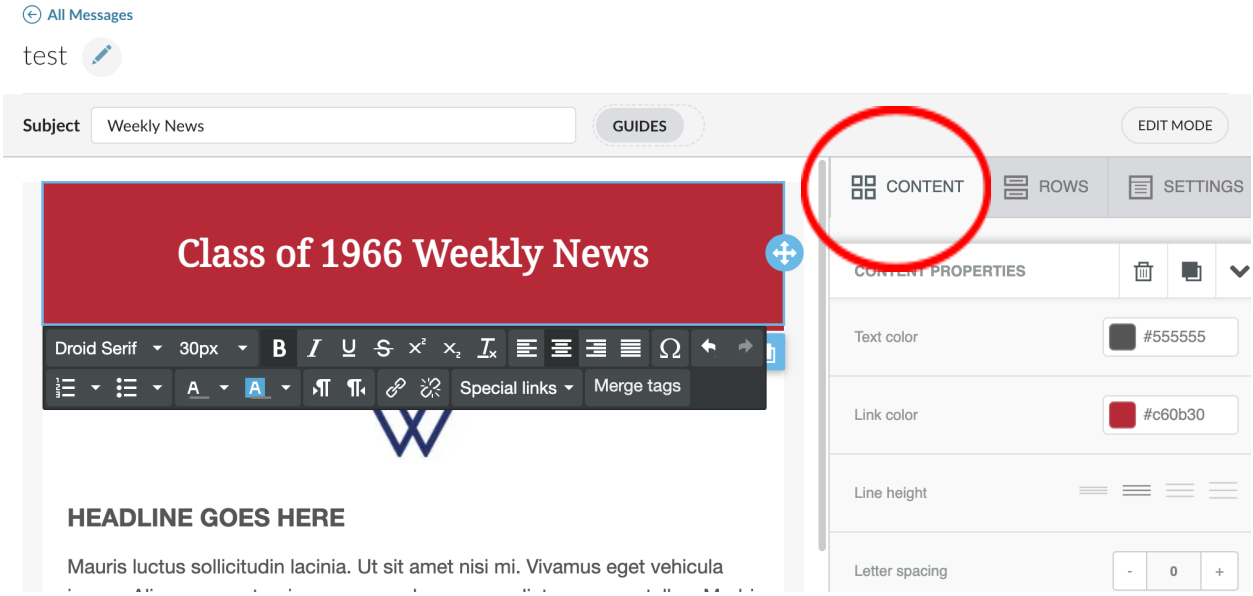
7. The same goes for the other content areas. Simply highlight the text and edit what you want.



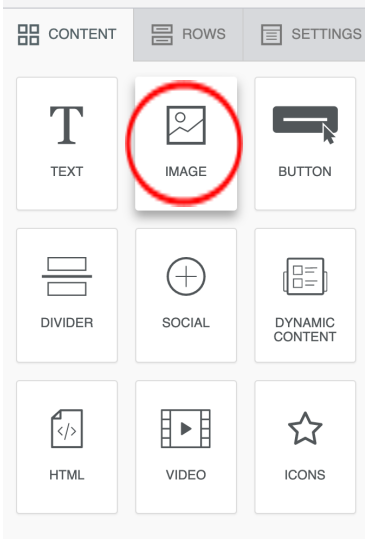
ADDING A PHOTO

You must upload the image to Resources first. Only then will the photo be available to insert into your Message.

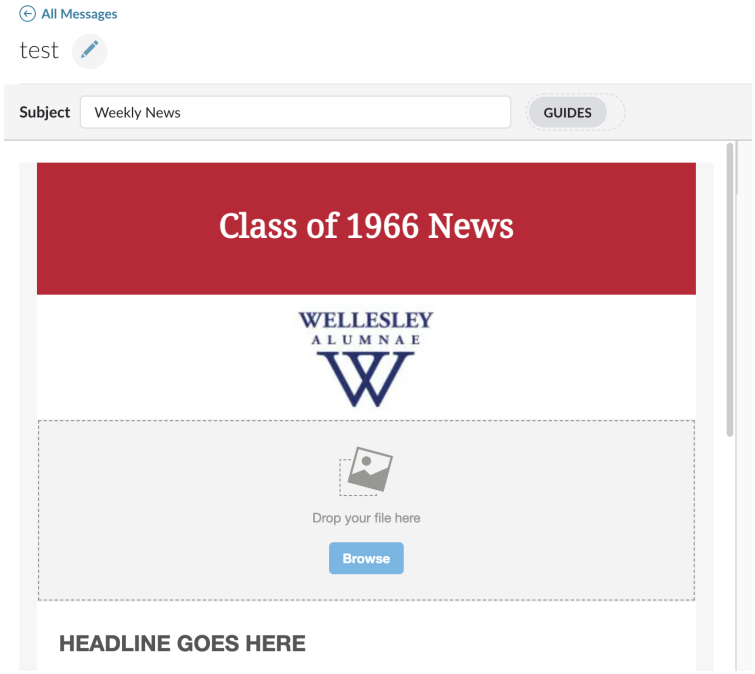
1. To add a photo to your newsletter, first click on the content tab.



2. Click and hold on the button that says Image. Drag the button where you want your image to be.



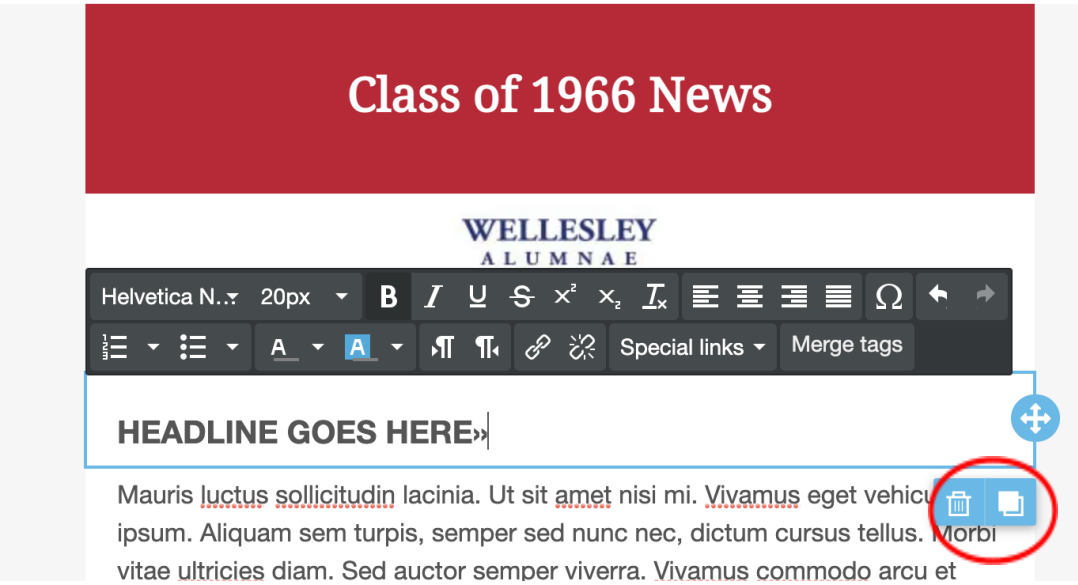
3. Click on the Browse button or drag the image you want onto the gray box.



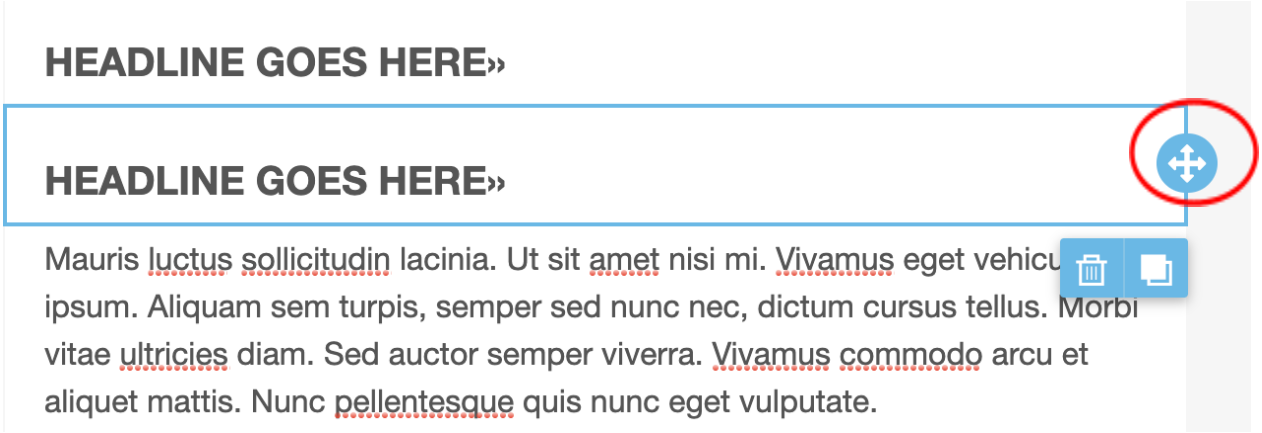
4. Images in emails should be approximately sized 600 pixels wide. Using a larger image can cause slow loading times and/or can crop the graphic differently than expected.

THE CLONE ICON

1. Next to the blue and white Trash icon there is the Clone icon (which looks like two squares overlapping).

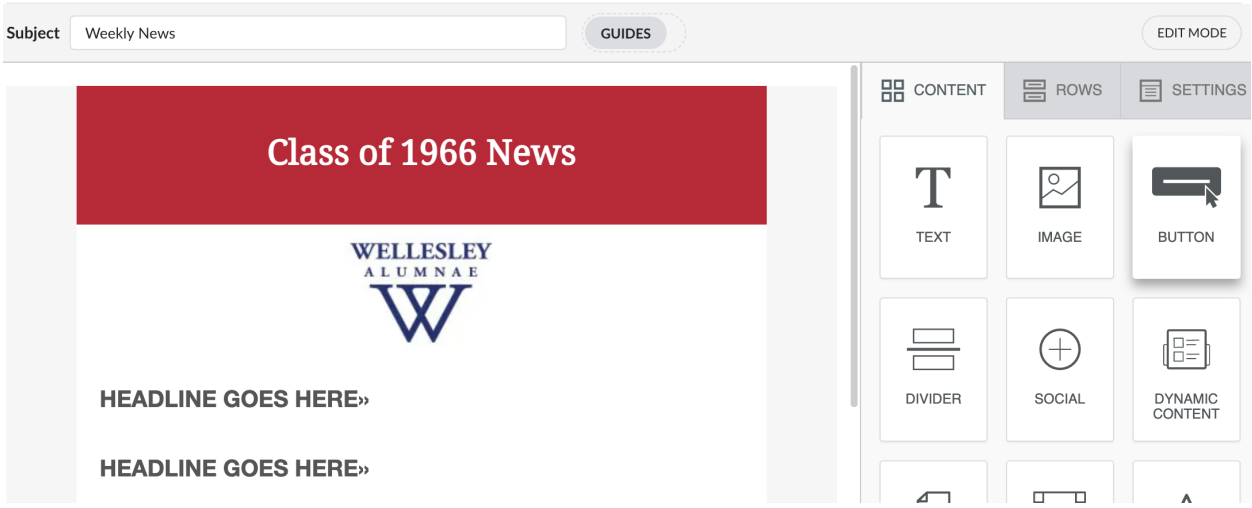


2. After clicking on the Clone icon you can drag and drop the copy by clicking on the four arrows icon.

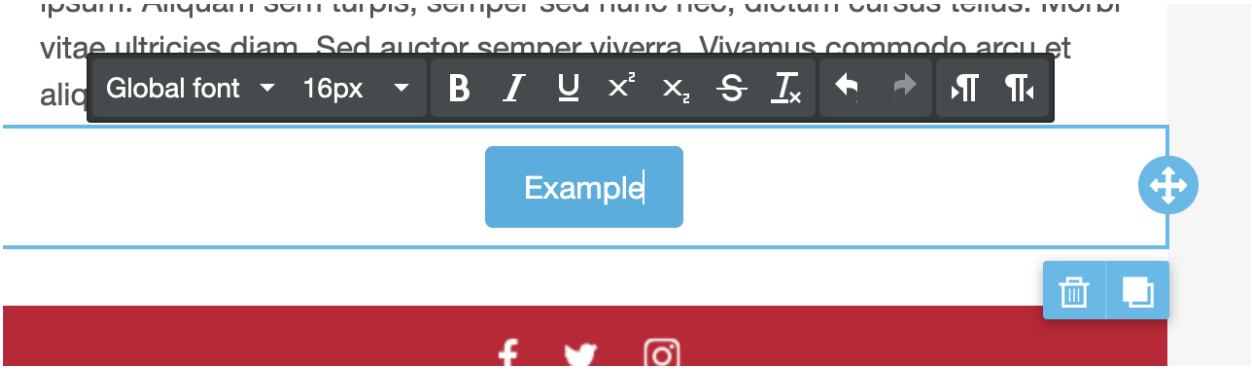


ADDING A BUTTON

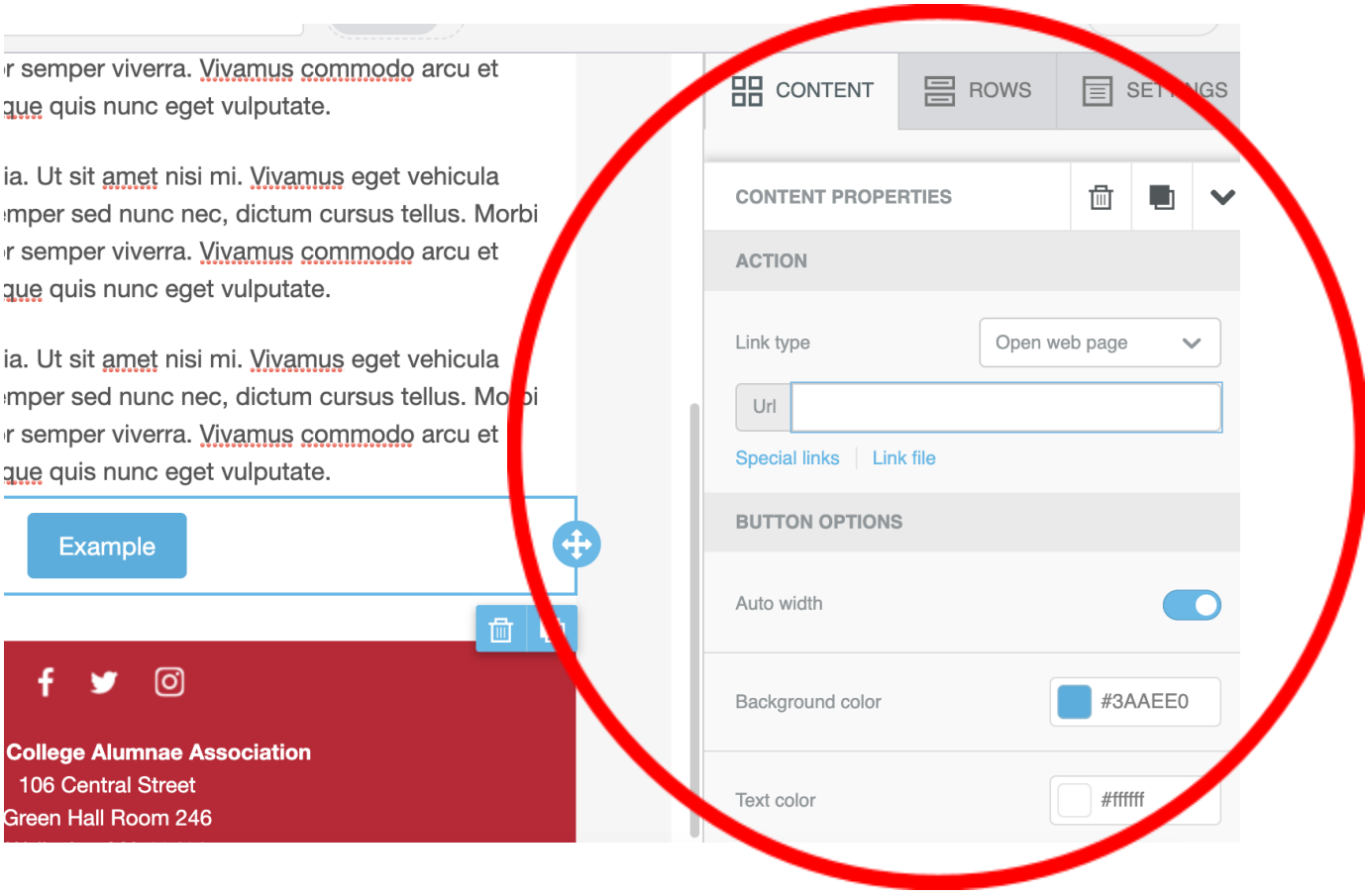
1. Go to the Content panel and drag the Button element into the email.



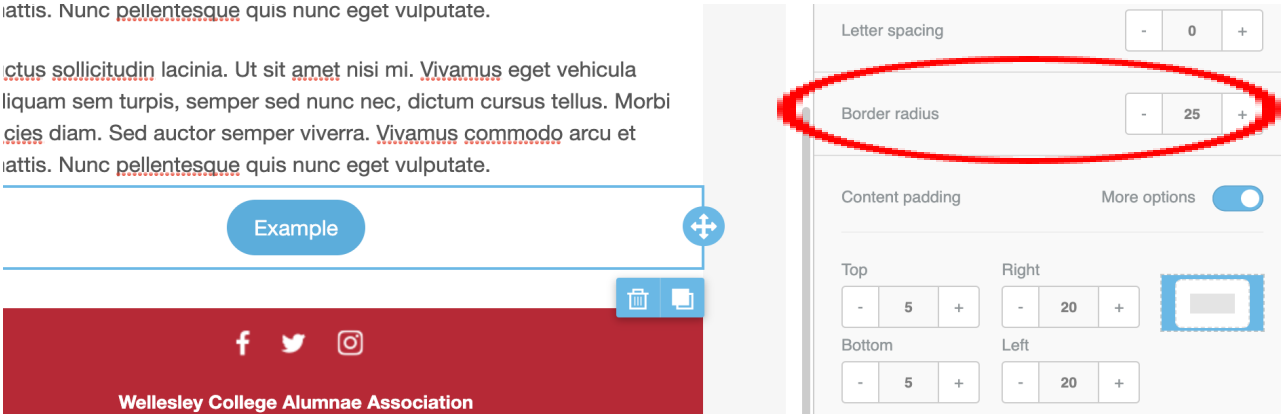
2. Adjust the text on the button.



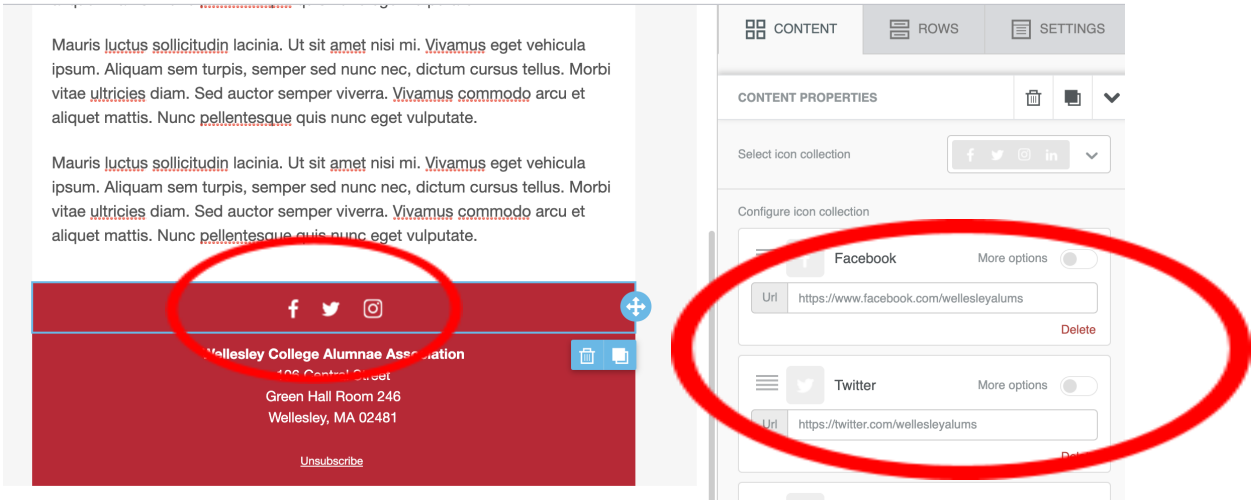
3. Under the Content Properties panel you can edit the appearance of your button. You can also add the URL for your button here.



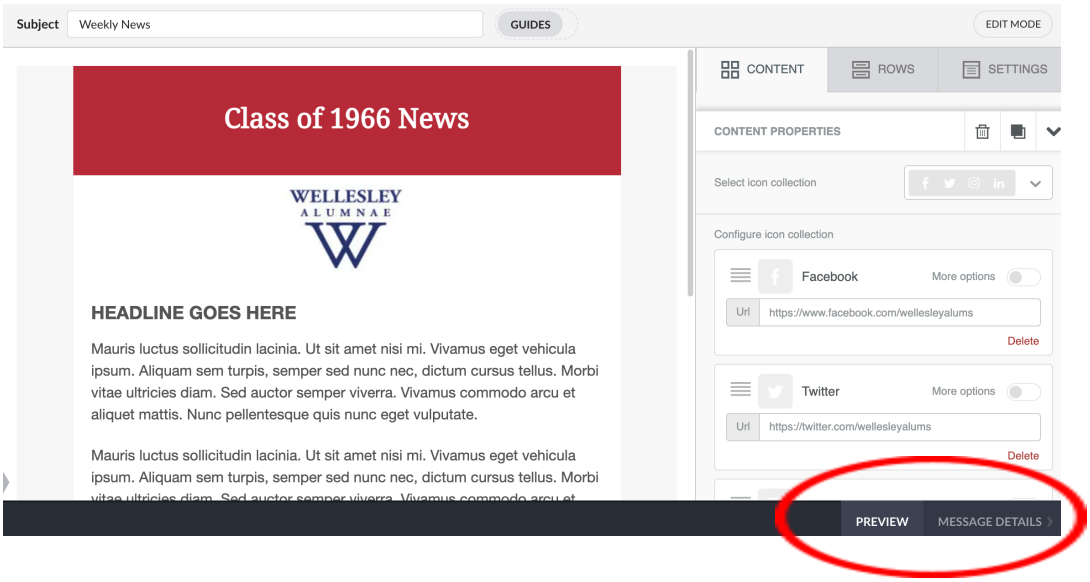
4. If you scroll down the Content Properties panel, you will see a Border Radius setting. By increasing the border radius you can make your button more round. By decreasing the border radius you can make your button more square-like.



5. If you have chosen an email template like the one in the example below, there are links to the Wellesley Alumnae Association's social media accounts. By clicking on the area that has the Facebook, Twitter, and Instagram icons, it will take you to the Content Properties section. There, you can edit the link locations if your group has your own social media accounts.

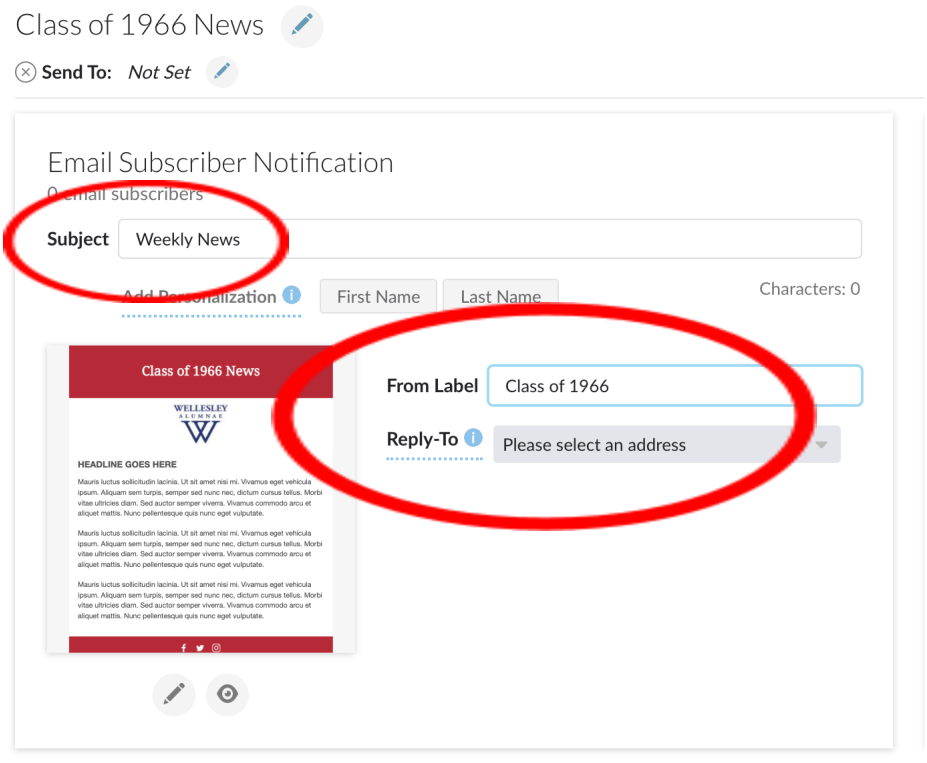


6. Click the Save button on the bottom right corner. Then click the preview button in the bottom right corner.

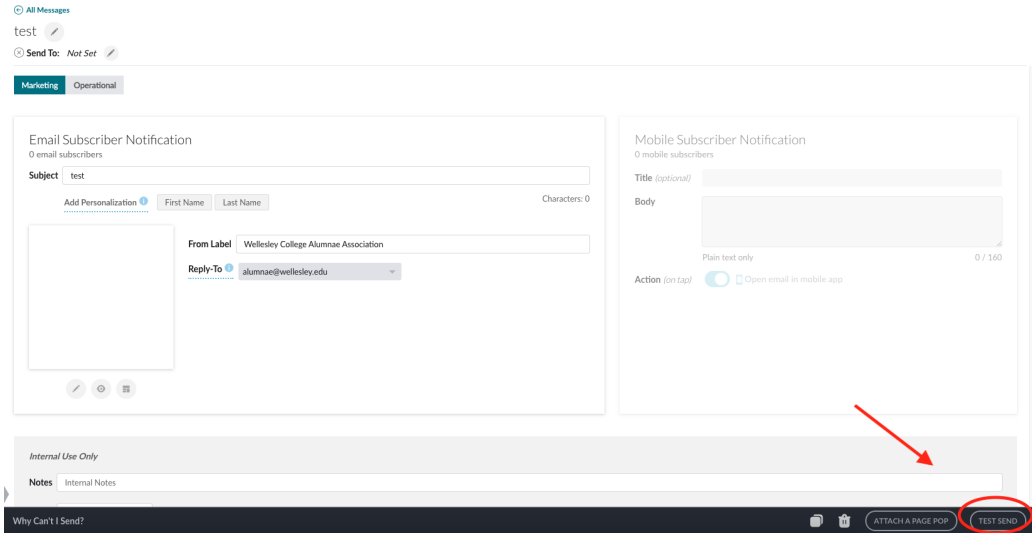


PREPARING YOUR MESSAGE TO SEND

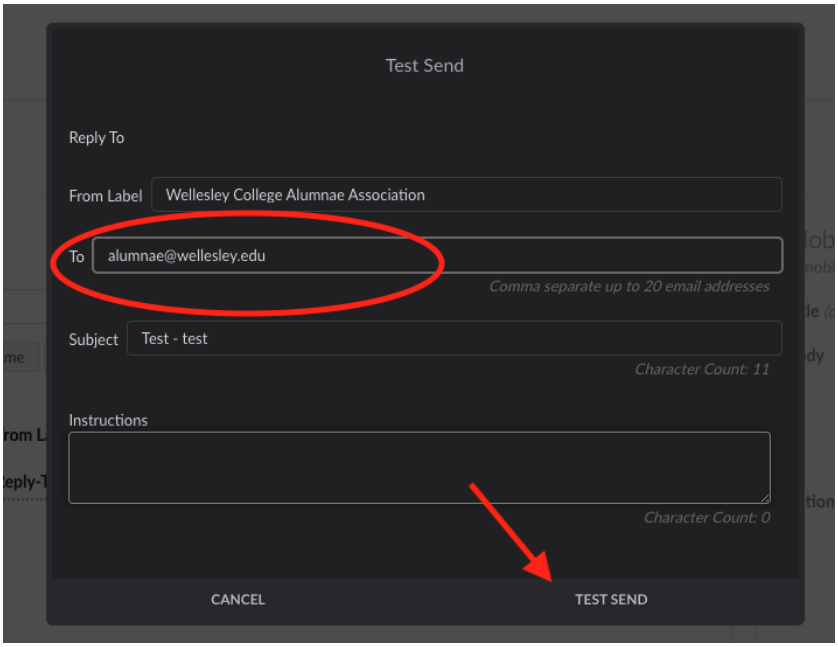
1. Click Message Details to get your email ready to send.
2. Double check your subject line, add a From label, and select a Reply-To address.



3. Click Update in the bottom right corner and then click Test in the bottom right corner.



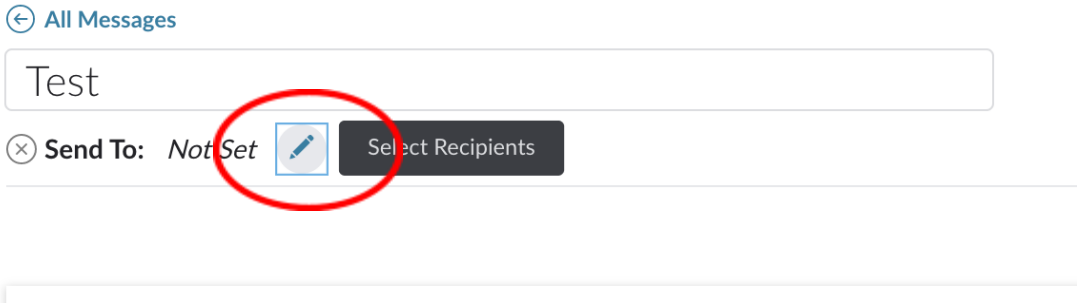
4. Add the email addresses you would like the Test email sent to and then click “Test send”



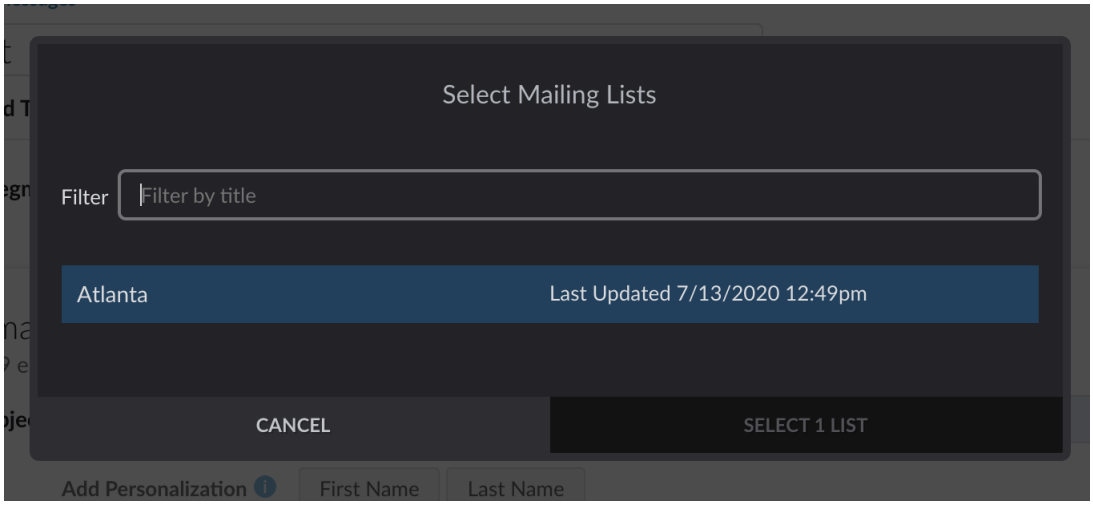
ADDING A LIST

Once you have reviewed your message, you are ready to add your mailing list.

1. At the top, underneath the name of your message, where it says “Send To,” click on the pencil icon.

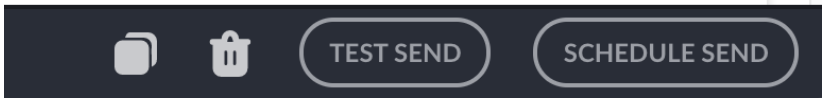


2. Select which mailing list(s) you would like to send your email to.



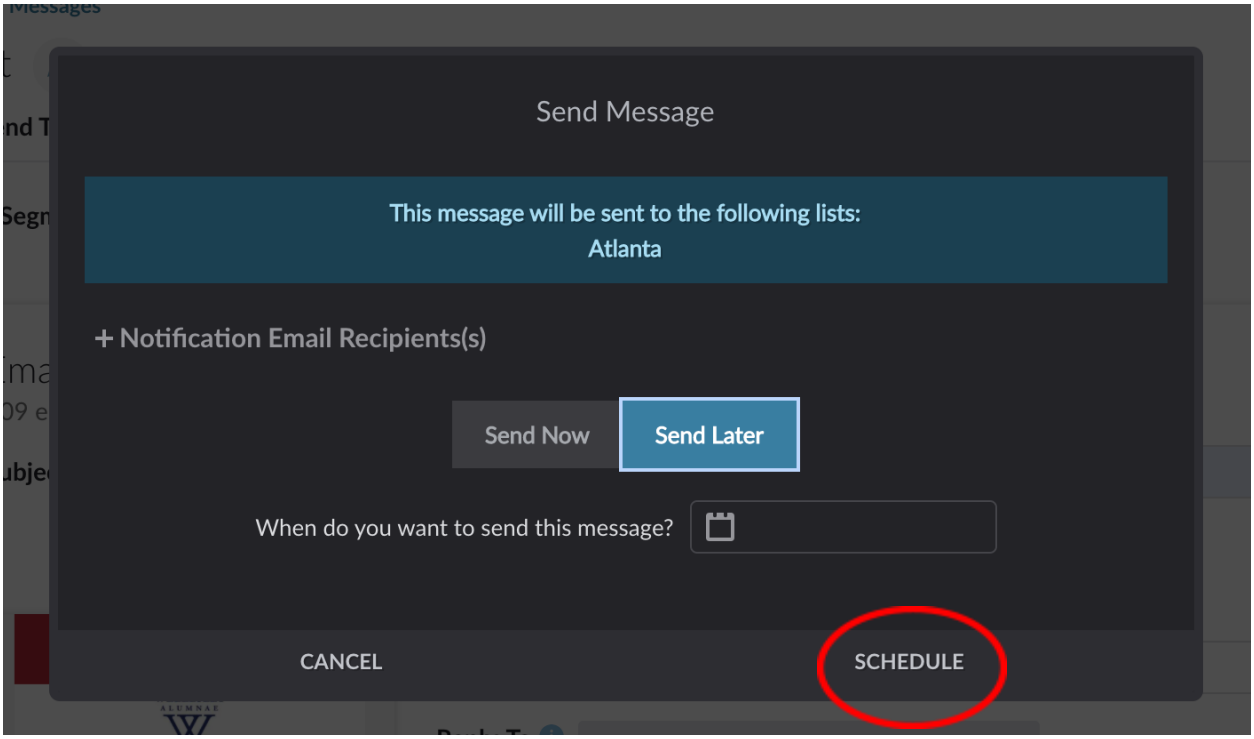
SCHEDULE AN EMAIL

1. Click the button that says “Schedule Send” at the bottom right of the screen.



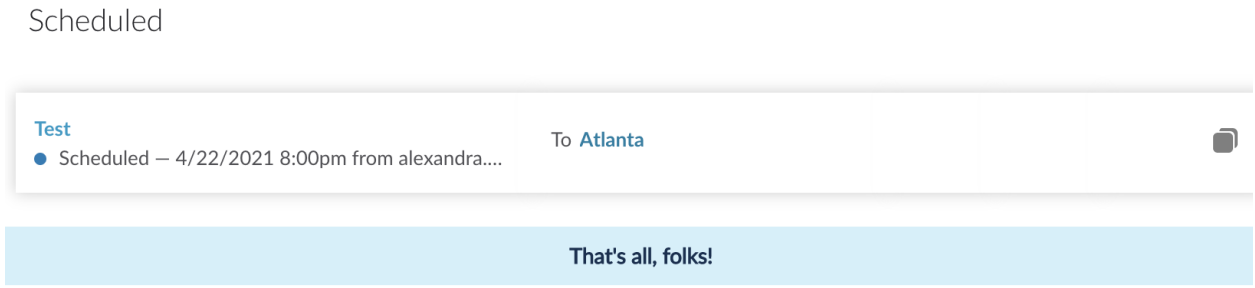
2. Click “Send Later” and edit the section where it says “When do you want to send this message?”

3. Click the Schedule button when you are finished.

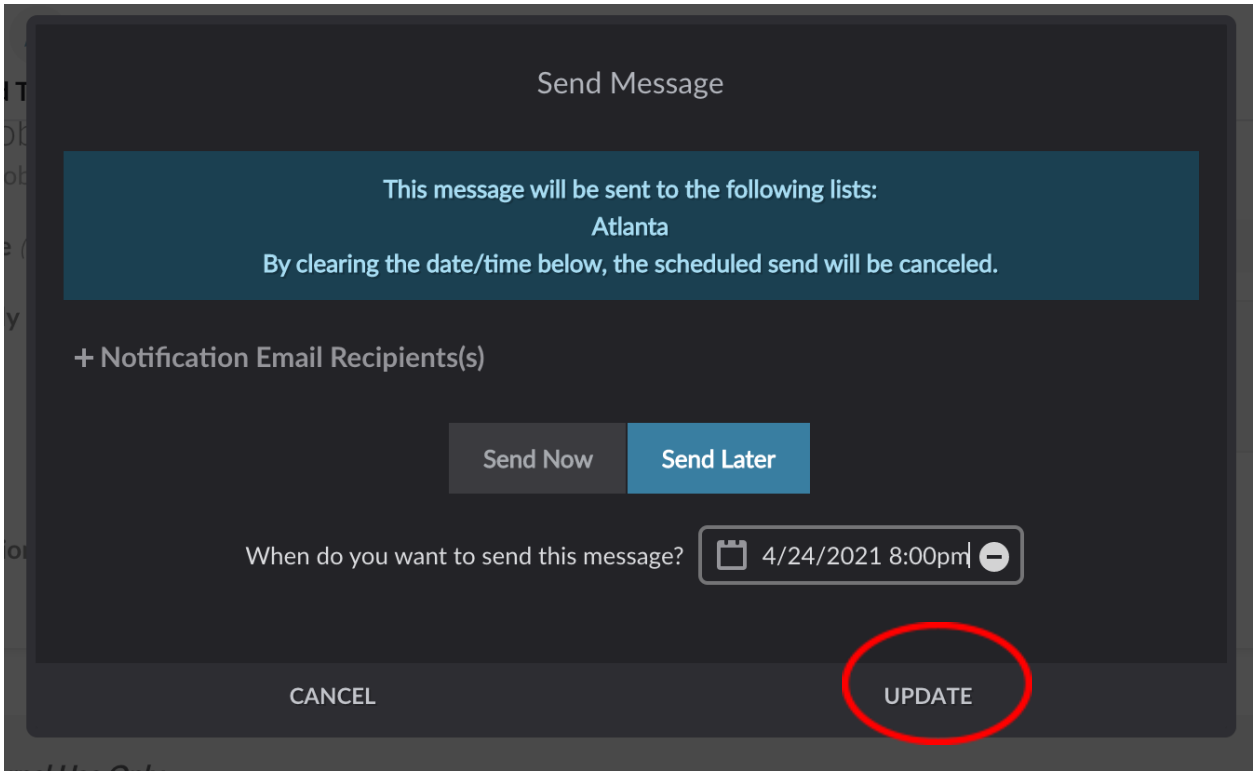


CANCEL A SCHEDULED EMAIL

1. Click on the email name (for example, the test email says “Test”).



2. In the bottom right corner click “Update Schedule” and from there you can change the time/date the email is supposed to be sent. If you clear the date it will cancel the schedule send. Click “Update” when you are finished.



3. You will now be able to return to your email to edit it.

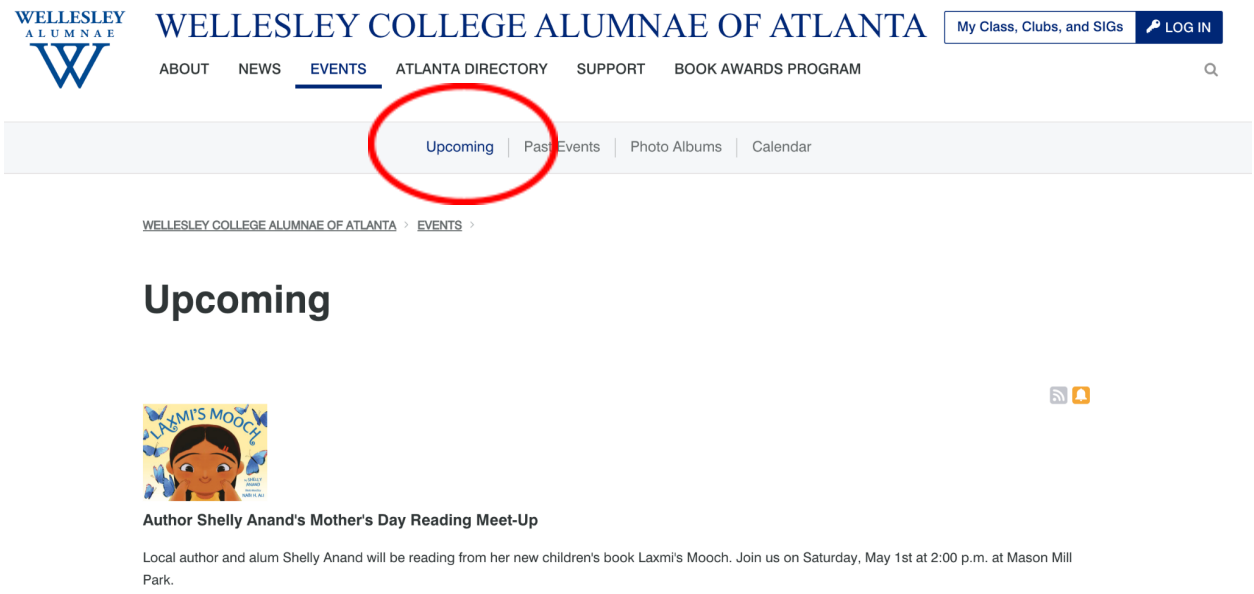
Calendar Manager

The Calendar allows your constituents to see all events at a glance. It also gives you the opportunity to share your events on the main WCAA calendar.

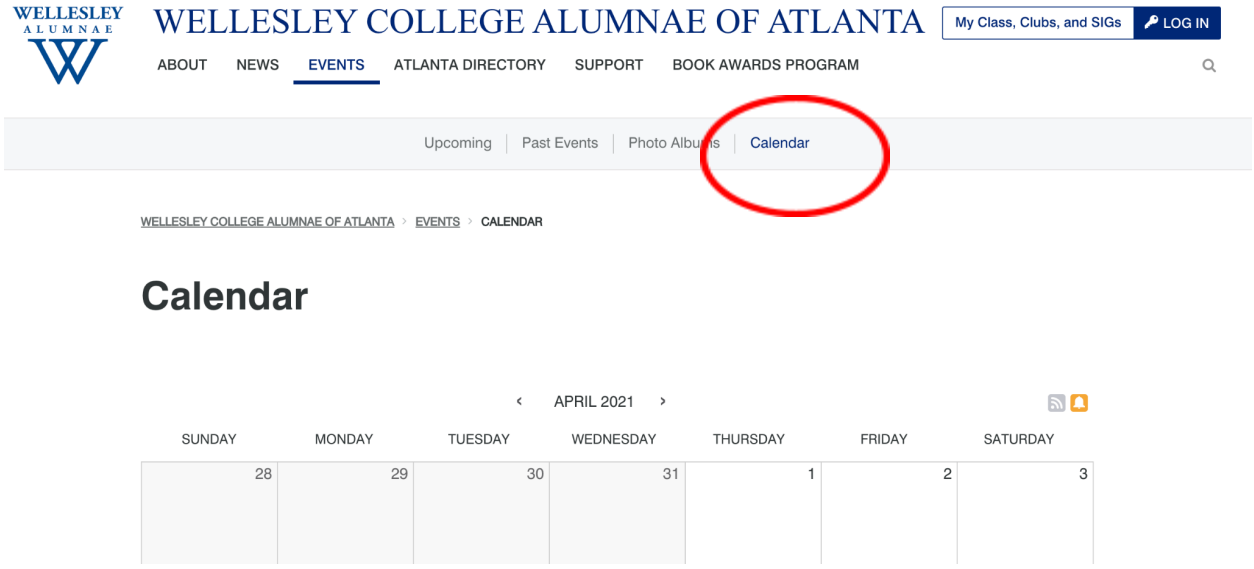
It is important to know that event posts and Calendar are separate components meant to complement each other. If you create an event post, you can add the link to the calendar listing. Calendar entries can't be made into a post—you will need to do that separately.

1. Events are listed under the "Events" tab of your website.

2. Upcoming events are located under the "Upcoming Events" tab. Events are created in the Posts module.



3. There is also a calendar feature for each site. This calendar will show all the events you created by using Calendar Manager.



EVENTS ON YOUR HOMEPAGE

Your website also has a list of events on the homepage. Here's how these are made:

1. On the dashboard, click on the square and then click on the tab that says Calendar Manager.

FULL CALENDAR

TUESDAY, APRIL 20

Careers in Government and Politics

6:00 PM - 7:45 PM

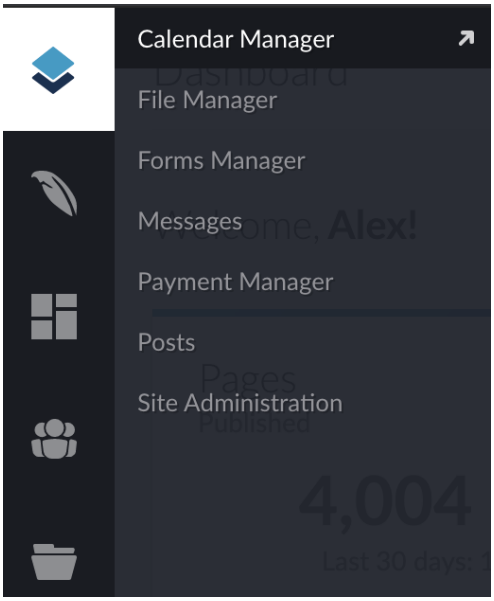
SUNDAY, APRIL 25

Window on Wellesley

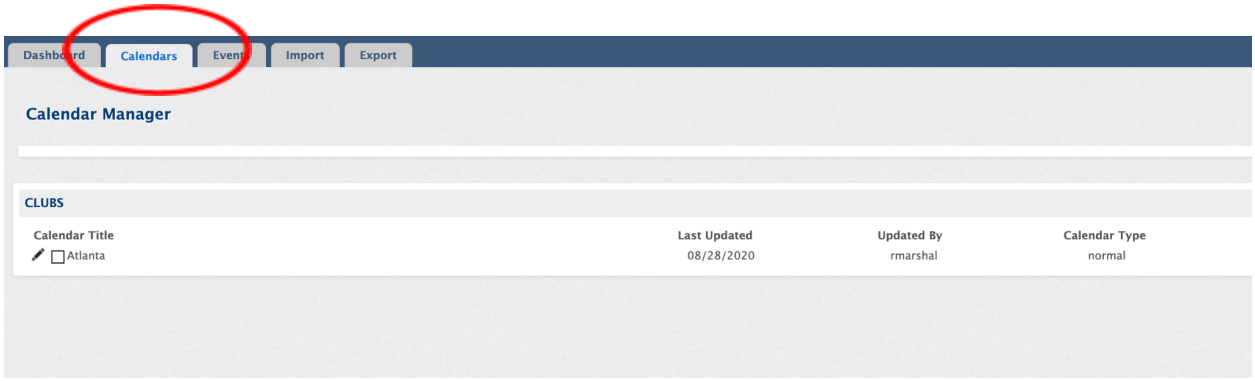
WEDNESDAY, APRIL 28

Women & Financial Literacy

12:00 PM



2. Click on the “Calendars” tab for a list of all calendars.

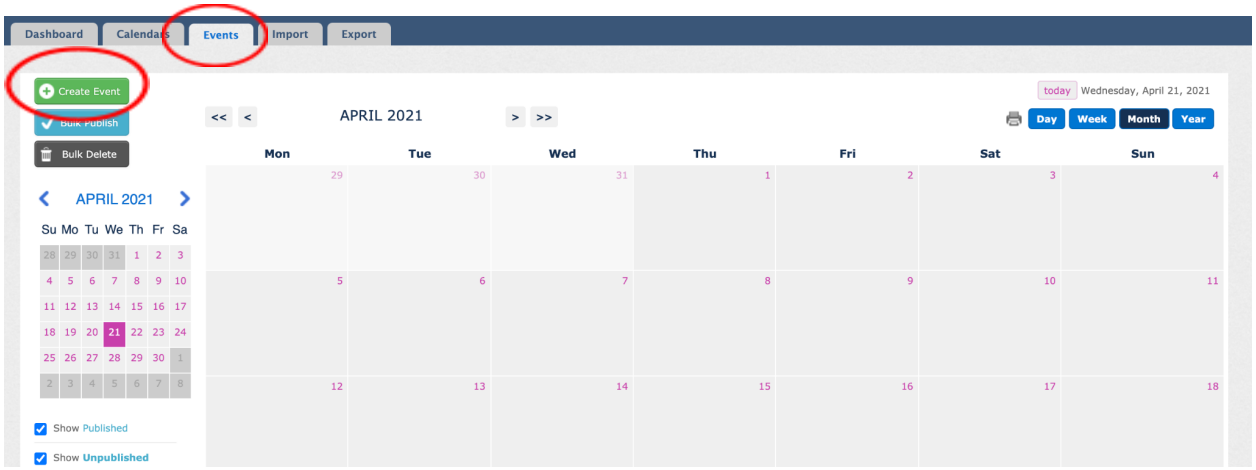


Posts can be re-ordered by changing the start date in the post.

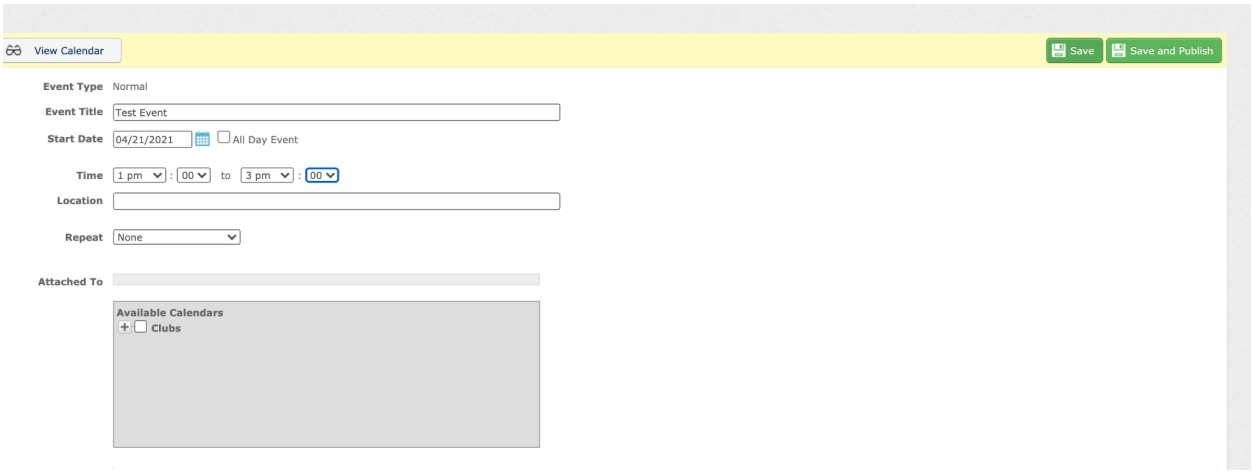
When you go into the news or events boards, you will see that the oldest post is last on the list. This also means that the oldest post will appear last in the list of News/Events.

You can change the date by editing the start date, which can be viewed on the right hand side of the post's editing page.

3. Click on the “Events” tab to create an event. Click on the green “Create Event” button at the top left.



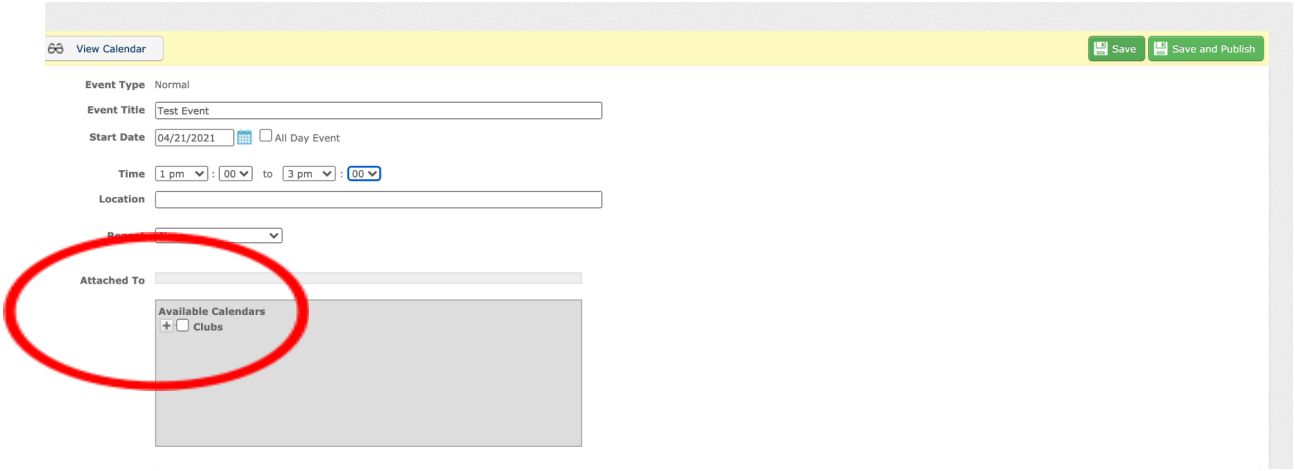
4. Put in the information for your event. Enter a name for your event and choose the time. The time does not have a timezone attached to it, so be sure to include the timezone in your description.



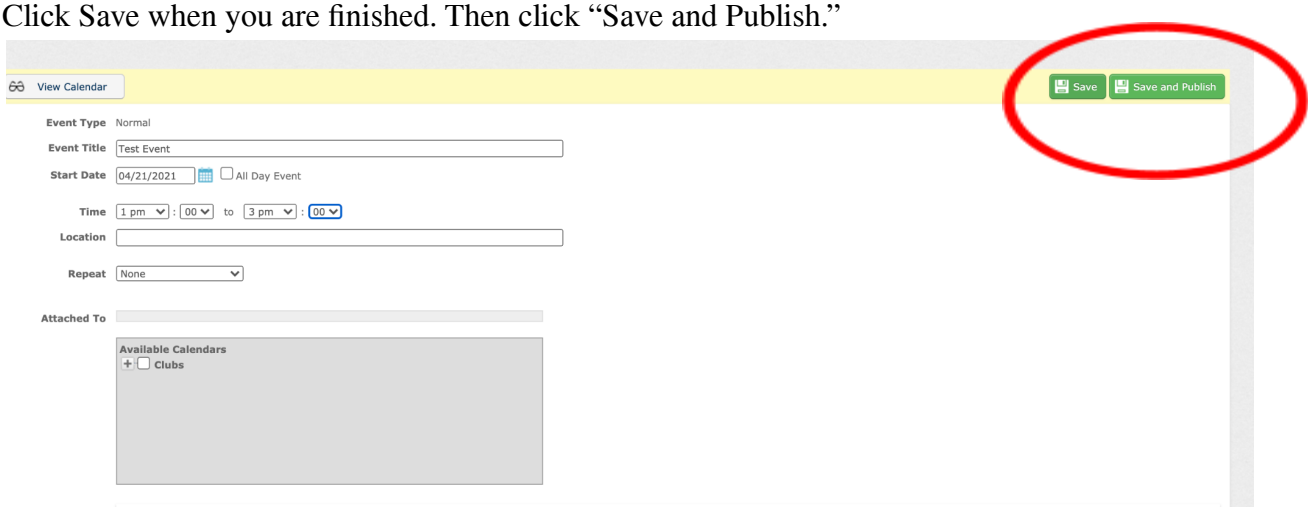
For security purposes, please do not include Zoom links with your public facing event information. Details like that should be sent to your group or registrants directly.

The same would be true of information such as a home address where an event is taking place.

5. Under the "Attached To" section, choose a calendar for your event. We encourage you to put your event on the main WCAA calendar—please put your group name on it so that site visitors know which class, club, or SIG the event is for.



6. Click Save when you are finished. Then click “Save and Publish.”



7. Now go to the Events tab on your website, where your event should appear at the bottom.

If you would like to have your past events appear on a Past Events page, please contact wcaawebsupport@wellesley.edu. It is also possible to set up past messages to feed to a Past Newsletters page.

Questions?

- If you have questions that are not answered in the manual or experience any difficulties, please email wcaawebsupport@wellesley.edu.
- Find answers to topics frequently asked about in this resource document.
- View questions and answers from the BLUEprint 2020 Web Administrator Session.