

2019

Wildcare Content Management System

A President and Secretaries Manual

This manual has been written to assist users to operate the parts of the Wildcare content management system relevant to them. It has been developed as problems and issues have arisen and should be considered a work in progress.

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Wildcare Inc
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Wildcare Content Management System

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Overview

This manual has been written to assist branch Presidents or Secretaries to operate the parts of the Wildcare content management system relevant to them. It was updated in late 2015 after the upgrade of the website.

It has been developed as problems and issues have arisen and should be considered a work in progress. If there are things missing from this manual that you would like some assistance with, then please send an email to webmaster@wildcaredtas.org.au. Part of their role is to continually update the manual as the system changes.

The website launched in November 2014 runs on the WordPress and CiviCRM software packages. These systems have been customized to accommodate the needs of Wildcare and our complex operations.

This manual was written using screen captures from a Firefox browser. Using a different browser may change how individual pages appear. Where it is known that an issue exists with a particular browser it will be noted in the text.

Why a content management system?

Many people wonder why we have gone down the path of an online content management system. The main benefit of the system is that we can assign various roles to members and spread the load for both the development of content for the website, as well as many of the administration roles. Wildcare relies heavily on keen and trusted volunteers and this system enables us to give members open access to the system whilst maintaining levels of control on what individuals can undertake.

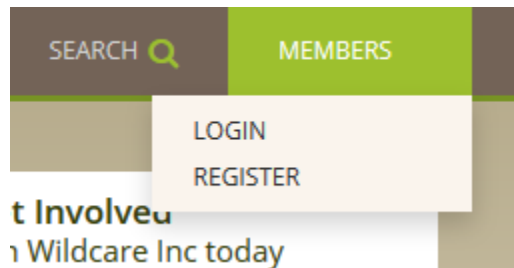
Some volunteers take on many roles. They may also change those roles over time. Re-delegating roles is a simple matter and once the basics of the system have been mastered it's very easy to use.

What roles are available to you?

In the updated system you have a **single login** that gives you a range of possibilities. As a member some things will be available to you, and as a President there will be additional facilities and functions that you can perform.

If you stop being a President or are not a financial member then these rights will change dynamically.

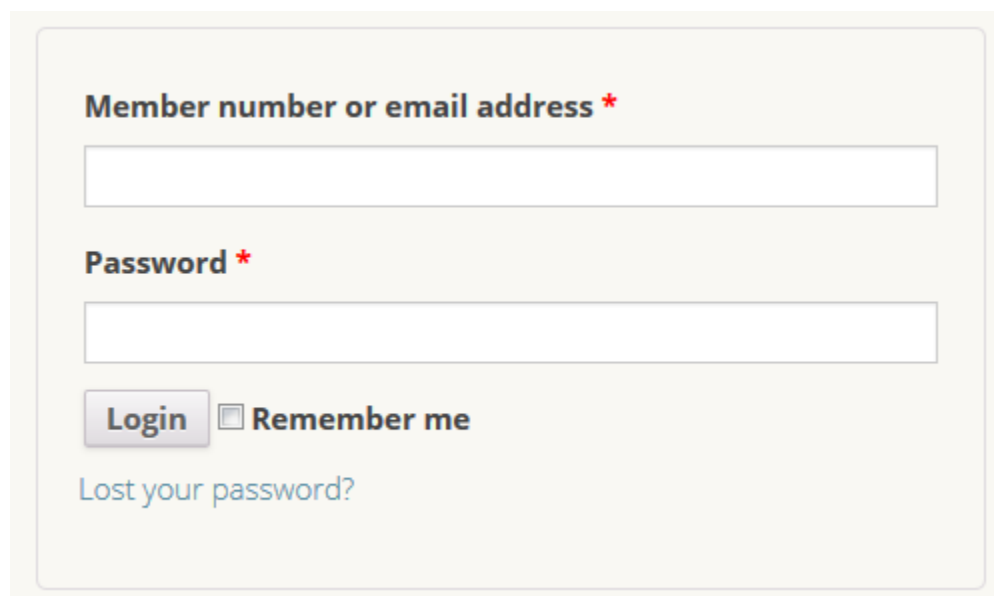
To sign in to the website simply click on the members link and click on the LOGIN item



You then need to enter either your member number (which you retain for life) or your email address and your password. If you tick the Remember me radio button then you will always be logged on each time you come to the site.

You can also get to the login screen from the following URL

<http://wildcaretas.org.au/my-account/>

A screenshot of the Wildcare login form. It is a light beige rectangular box with rounded corners. Inside, there are two input fields: the first is labeled 'Member number or email address *' and the second is labeled 'Password *'. Below the password field is a 'Login' button and a checkbox labeled 'Remember me'. At the bottom of the form, there is a link that says 'Lost your password?'.

This is also the place where you can recover your password if you forget it. Click the “Lost your password?” Link and you will be asked to enter your member number or email. Press the reset password link and you will receive an email advising you how to change your password

You can also get to the lost password screen from the following URL

<http://wildcaretas.org.au/my-account/lost-password/>

This manual assumes that you have signed into the website as a financial member and are also a branch President.

Two levels of access

We have created two “President” roles, Basic and Advanced. They can be assigned to any member who undertakes editing of the website. We are aware that some Presidents or Secretaries only use the site in a limited capacity so the two roles differ in the areas of access.

Basic President

This role can undertake the following tasks on the website:-

- This role is restricted to just your branch
- Access files required by Branches (WHS, insurance etc)
- Add news articles and send email alerts to branch members about these articles
- Edit the branch page
- Upload documents
- Upload images
- Send event details to the webmaster for loading onto the calendar
 - Change the status of event participants (registered, attended, no shows)
 - Email members who have registered for events

This role also gets access to the full Wildcare contact database which does come with the responsibility of ensuring the privacy of our members is maintained.

- See a full listing of ALL Wildcare members for every Branch including
 - Current and new financial members
 - Members who have expired in the last twelve months
 - Members who have expired at any time

Advanced President

In addition to the items above an advanced President can:-

- Add any event, for any branch to the calendar
- The ability to do more sophisticated mailouts to branch members

The expectation is that people taking on this role will be willing to add events on behalf of others. It will suit those who also look after, or are involved with multiple branches.

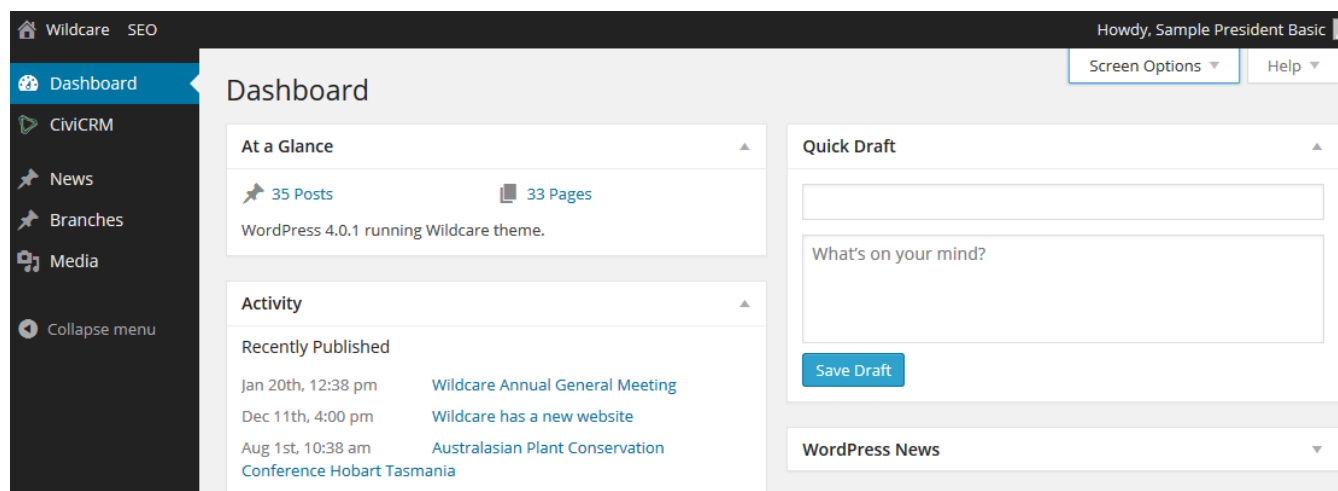
Editing via the website (Wordpress)

Presidents menu

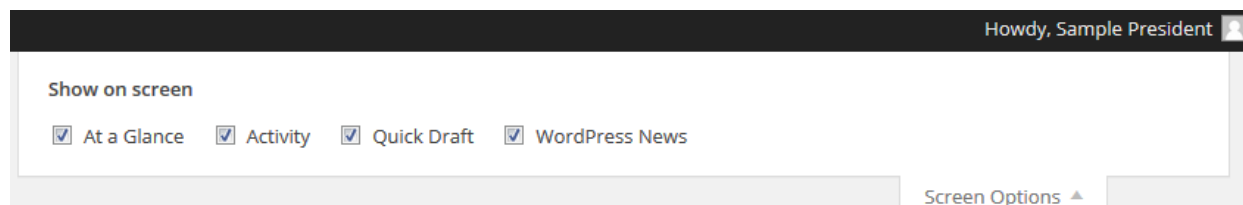
As a branch president you get the ability to manage your branch via the web. Once logged in as a President you will see that you have a toolbar at the very top of the page. You will also have additional items under the Members menu item. The latest copy of this manual will always appear under the Members, Files link.



If you click on the Wildcare link on the left hand side you will also get additional menu items.



If you click on Screen Options you can turn off all those items that appear on your dashboard. Simply untick them and click back on dashboard. This will be saved so next time you come to the dashboard there will be no items showing.



The menus on the left allow you to edit your branch page(s) and to add news posts. In the future, it's likely that more options will be added here.

Branch home page

Your branch home page is where you introduce your branch to other Wildcare members and the public. It's your portal that can contain as much, or as little information as you think necessary. It uses much the same interface as we have discussed previously but now you probably want to add images to the page as well as text. Here we will also introduce you to some styling techniques.

You need to start by selecting the branch home page that you wish to edit. Whilst most people will only be the president of one branch, a few are responsible for multiple branches.

Click on Branches menu item and it will expand to show you a list of branch pages that you have the ability to edit. In this example the president can edit "Wildcare Friends of GIS". Clicking on the title will open the branch page ready for editing.

The screenshot shows the Wildcare administration interface. On the left is a dark sidebar with a menu containing 'Wildcare SEO', 'Dashboard', 'News', 'Branches' (highlighted), 'Branches', 'Media', and 'Collapse menu'. The main content area is titled 'Branches' and shows a list of 70 items, with 70 published. Below the title are filters for 'Bulk Actions', 'All dates', 'All SEO Scores', and 'Access restrictions ...'. A search bar is also present. The table below has columns: Title, Author, Date, Access Restrictions, SEO, SEO Title, Meta Desc., and Focus KW. One row is visible for 'WILDCARE Friends of GIS' by Phil Wyatt, dated 2014/10/31, with access restrictions 'wildcare_friends_of_gis_content'. The interface is for 'Howdy, Sample President'.

Title	Author	Date	Access Restrictions	SEO	SEO Title	Meta Desc.	Focus KW
WILDCARE Friends of GIS	Phil Wyatt	2014/10/31 Published	wildcare_friends_of_gis_content		Wildcare Branches WILDCARE Friends of GIS		

Lets start checking out each component on the edit screen

[Edit Post](#)

WILDCARE Friends of GIS

Permalink: <http://wildcaretas.org.au/branches/friends-of-gis/>

[Get Shortlink](#) [Edit](#) [View Post](#)

[Add Media](#) [CiviCRM](#)

B I ABC

Paragraph

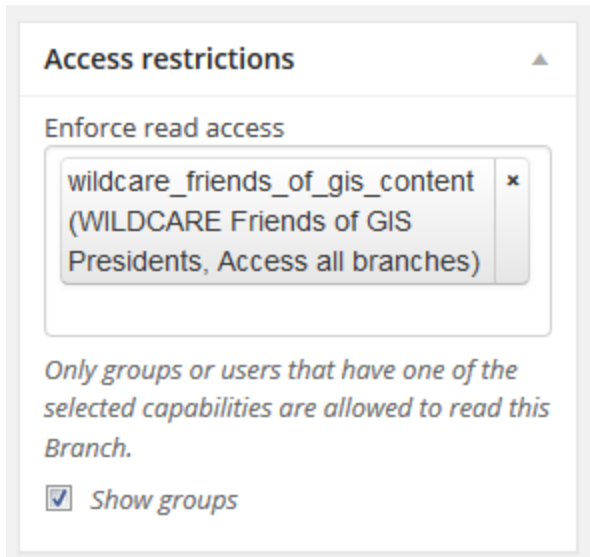
Friends of GIS are a self help group that meet on a regular basis to learn the QGIS mapping software. We come from a wide range of Wildcare groups across the state and help each other to prepare maps of our areas of interest. We are also happy to take on mapping tasks for other groups in the hope that they will also learn the software.

p

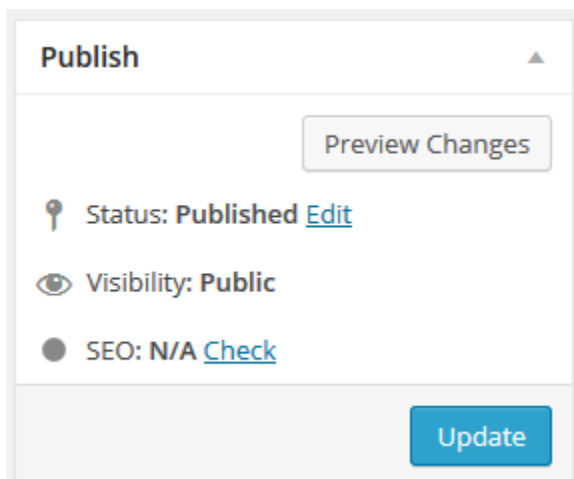
Word count: 66 Last edited by Sample President on January 27, 2015 at 11:55 am

Here we have the name of the group and some introductory text. There should be no reason to change the branch name or the Permalink. Contact the [webmaster](#) if you wish to change these as there are some ramifications of editing these. Your page may become hard to find via web searches.

This first paragraph of text is used on the main Wildcare branches pages and should be restricted to about 50 – 70 words and no images should be in this text. This text is the publics first introduction to your group so keep it snappy and light. The idea is that it gets them enthused enough to “Join this Branch”.



This item shows the access restrictions to this branch page. The access restrictions are in place so that only certain people can edit the page. In this case, people who have the permissions of “Wildcare Friends of GIS Presidents” or “Access all branches” (this is for administrators, webmaster and facilitators). In general you won't need to touch this item.



This item shows the current stage of the page – in this case published and public (other options might be private or draft). Again you will generally not have to edit these settings. We use the Update button after we have made changes to the webpage. This is the equivalent of saving the page and sending the changes to the live website.

Don't worry about the SEO Check. SEO stands for “Search Engine Optimisation” and is handled by the webmaster and our developers.

WordPress SEO by Yoast

General
Page Analysis
Social

Snippet Preview

Wildcare | Branches | WILDCARE Friends of G
wildcaretas.org.au/branches/friends-of-gis/
Friends of GIS are a self help group that meet on a regular basis
mapping software. We come from a wide range of Wildcare group

Focus Keyword:

SEO Title:

Wildcare | Branches | WILDCARE Friends of GIS

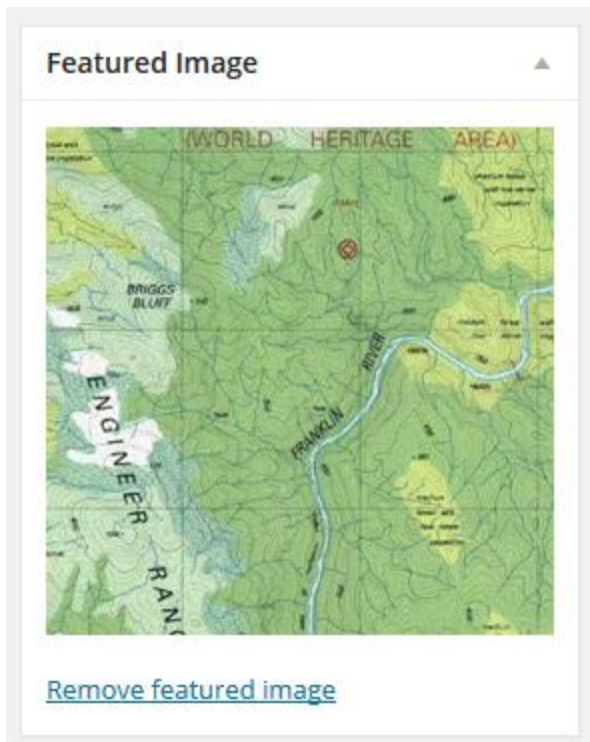
Meta Description:

The meta description will be limited to 156 chars, chars le

This item is about Search Engine Optimisation and is handled by the webmaster and our developers. If you click the “up arrow” on the top right it will collapse this item forever (after you press update). There is no reason to edit anything in this area.

Collapsing the item will give you some more screen space.

WordPress SEO by Yoast



This item is the featured image that appears on the main branch page for this branch. It should be an image that has been cropped to no greater than 1000 pixels. If the image is too big then it slows down the loading of the page and will frustrate people looking at the Wildcare website.

Remember that the new website works on all devices including mobile phones so we don't want folks using up lots of their 3G/4G data allowance downloading huge images!

The webmaster is happy to crop images if you do not have suitable software.



CARES /// 15 MEMBERS

WILDCARE FRIENDS OF GIS

WILDCARE Friends of GIS

Friends of GIS are a self help group that meet on a regular basis to learn the QGIS mapping software. We come from a wide range of Wildcare groups across the state and help each other to prepare maps of our areas of interest. We are also happy to take on mapping tasks for other groups in the hope that they will also learn the software.

LEAVE THIS BRANCH ✓



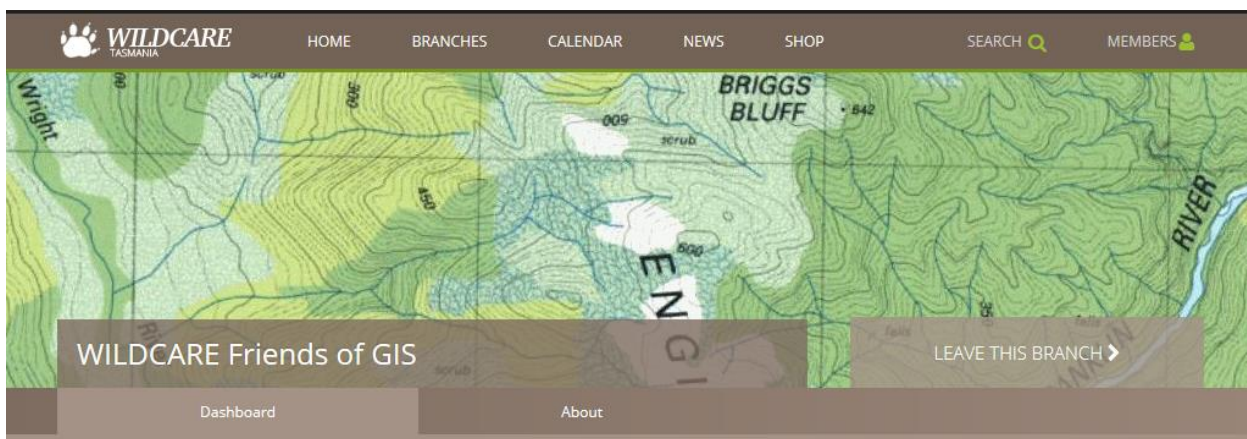
Centre this branch on the map

Banner Image



The banner image is the image that appears across the top of your dedicated branch page. Again the image needs to be cropped to exactly 1920 pixels by 270 pixels. This is the best size to accommodate larger screens without the image becoming blurry. On a small screen the image focusses on the area around the centre of the image so that should be where the highlight of the image is located (if possible)

The webmaster is happy to crop images if you do not have suitable software.





The information panel is where we write our main text about the branch.















The headings “Who we are” etc are all formatted with Heading 2.













Main text is always just formatted as paragraph and the external link heading is just bold.

Information

 Add Media

 CiviCRM


B *I* ABC              

Paragraph            

Who we are

Friends of GIS are a self help group that meet on a regular basis to learn the QGIS software. We come from a wide range of Wildcare groups across the state and help each other to prepare maps of our areas of interest.

Members have a range of special interests. We can support users on Windows, Mac and Android devices. To make things easier we are all working with version 2.2 Valmiera. QGIS was chosen as our software of choice as its open source and free. Its also supported world wide by a very active community of developers.



Where we work

At this stage we hold our sessions at the Parks and Wildlife Offices at Glenorchy (1-3 Murrayfield Court, Glenorchy) however we are keen to support people in other locations. This can be accomplished via email.

What we do

We are all learning the QGIS software as well as the fundamentals of using Geographical Information Systems (GIS). This includes the use of GPS's for data capture and may well lead to other systems such as Open Street Mapping and software such as FulcrumApp for data capture in the field. If you would like assistance in capturing data just drop us an email and will try and assist you with your issues.

Our Contacts

President - Phil Wyatt fogis@wildcasetas.org.au

External Links

[QGIS Software](#)

[Open Street Mapping](#)

[Fulcrum App](#)

p » strong

Allow signup



This option is what sets up the “Join this branch” button. It should always be on for most branches. Turning it off means people cannot join your branch and therefore they cant get emails about events, news posts etc.

Branch Tag *

Education



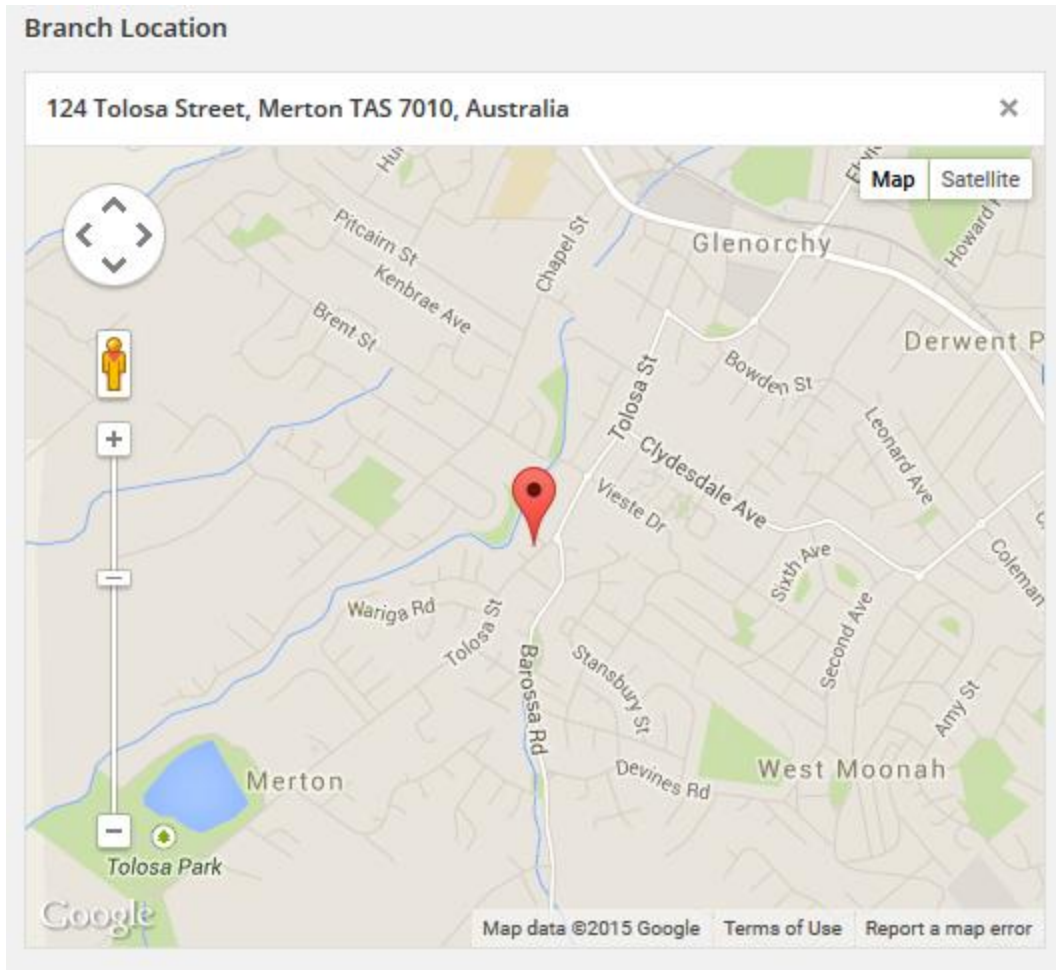
Branch Group *

CARES



The branch tag is used as a quick filter when folks are searching the main branch page. You can only select a single tag so it should be the one that best reflects what your group is about. Most groups will be Community unless there is a specialist focus like heritage or wildlife.

The branch group is the single, higher level branch of Wildcare that your group belongs - CARES, NatureCare, Heritage Care or the Wildcare Office



Branch location is the place where your group generally operates. It's used to locate you on the branch map. You can either type in an address at the top and select from the list OR move the map around and drop a pin on the map. This is not used for events – there is a separate process for locating the start point for events.

Adding files

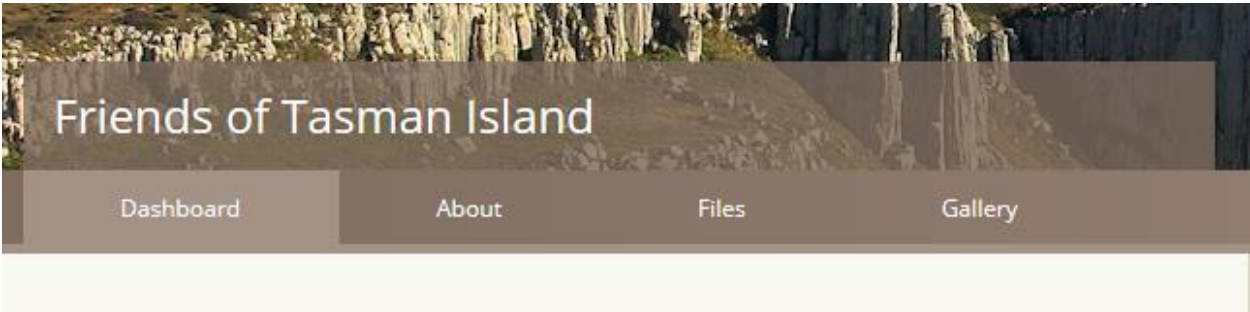
Files

	file	
--	------	--

Add Row

The files item allows you to load files such as PDF’s to your website. Adding a file here automatically adds a files tab to your branch homepage. Adding a description to your file when it’s loaded will also show the description within the listing.

Once you have loaded some files you can also reorder them by simply clicking on the number to the left of the file, clicking and holding the left mouse button and dragging them up and down.



Files

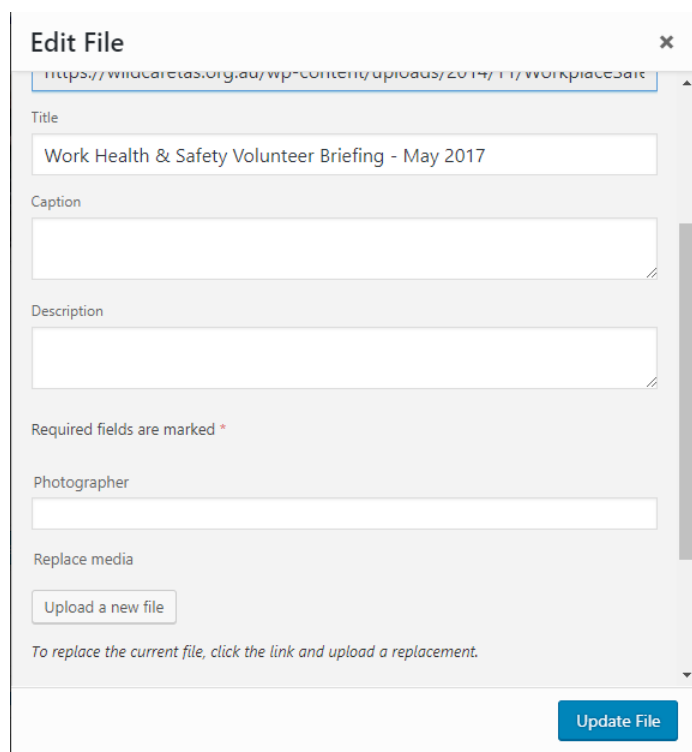
	file	
1	<div><div></div><div><div>FOTI Newsletter No 13 - Nov 2014</div><div>Name: Newsletter-13-Nov-2014-pdf-pub-2-2.pdf</div><div>Size: 1 MB</div></div></div>	
2	<div><div></div><div><div>FOTI Newsletter No 12 - July 2014</div><div>Name: Newsletter-12-PDF-final.pdf</div><div>Size: 2 MB</div></div></div>	
	<div><div></div><div><div>FOTI Newsletter No 11 - July 2013</div></div></div>	

Replacing existing files

Go to your branch page in Word Press. Scroll down to your files. Hover the icon over the document and you will see a pencil and a cross button. If you click on the cross button, you will delete the document. Click the 'edit' button (pencil) of the file you want to replace.



You will then be taken to the Edit File Screen and click on 'Upload a new File' under Replace media.



You then have two options:

- Just replace the file
- Replace the file, use new file name and update all links

Replace Media Upload

NOTE: You are about to replace the media file "WorkplaceSafety_VolunteerBriefing_May2017.docx". There is no undo. Think about it!

Choose a file to upload from your computer

No file chosen

Select media replacement type:

☒ Just replace the file

Note: This option requires you to upload a file of the same type (application/vnd.openxmlformats-officedocument.wordprocessingml.document) as the one you are replacing. The name of the attachment will stay the same (WorkplaceSafety_VolunteerBriefing_May2017.docx) no matter what the file you upload is called.

☐ Replace the file, use new file name and update all links

Note: If you check this option, the name and type of the file you are about to upload will replace the old file. All links pointing to the current file (WorkplaceSafety_VolunteerBriefing_May2017.docx) will be updated to point to the new file name.

Please note that if you upload a new image, only embeds/links of the original size image will be replaced in your posts.

[Cancel](#)

If you want to keep the original file name ie WorkplaceSafety_VolunteerBriefing_May2017.docx, you'd use the first option: **Just replace the file**.

However, given that the new file probably has a name something like WorkplaceSafety_VolunteerBriefing_Dec2018.docx (the system will automatically replace spaces with hyphens on upload) you should select **Replace the file, use new file name and update all links** (it obviously makes sense to have the correct, updated file name appear in the Media Library, to avoid possible confusion in the future).

Generally, you would only use **Just replace the file** if you were only making minor changes (eg fixing typos or grammatical errors) and didn't want to change version numbers or dates.

Select **[Choose File]** and browse to your new file. Double click on it and you will see it appears next to (Choose File).

Replace Media Upload

NOTE: You are about to replace the media file "WorkplaceSafety_VolunteerBriefing_May2017.docx". There is no undo. Think about it!

Choose a file to upload from your computer

WorkplaceSa...c2018.docx

Select media replacement type:

☐ Just replace the file

Note: This option requires you to upload a file of the same type (application/vnd.openxmlformats-officedocument.wordprocessingml.document) as the one you are replacing. The name of the attachment will stay the same (WorkplaceSafety_VolunteerBriefing_May2017.docx) no matter what the file you upload is called.





☒ Replace the file, use new file name and update all links

Note: If you check this option, the name and type of the file you are about to upload will replace the old file. All links pointing to the current file (WorkplaceSafety_VolunteerBriefing_May2017.docx) will be updated to point to the new file name.

Please note that if you upload a new image, only embeds/links of the original size image will be replaced in your posts.

[Cancel](#)

Select **[Upload]**.



Edit Media


Add New

Media file updated.

Workplace Safety Volunteer Briefing Dec 2018

Permalink: [https://wildcaretas.org.au/branches/wildcare-inc-office/WorkplaceSafety_ ...Briefing_Dec2018/](https://wildcaretas.org.au/branches/wildcare-inc-office/WorkplaceSafety_...Briefing_Dec2018/)

Edit



Caption

Description

In the **Edit Media** window replace the title with the actual title that you would like to have appear in the <https://wildcaretas.org.au/files/> list. As a minimum, replace the hyphens with spaces. If you wish, you can also update the description that appears alongside the document title in the Files list.

https://wildcaretas.org.au/wp-content/uploads/2014/11/WorkplaceSafety_VolunteerBriefing


File name: WorkplaceSafety_VolunteerBriefing_Dec2018.docx

File type: DOCX

File size: 43 KB

 Revised: December 20, 2018 6:12 am

 Readability: Needs improvement

 SEO: Not available

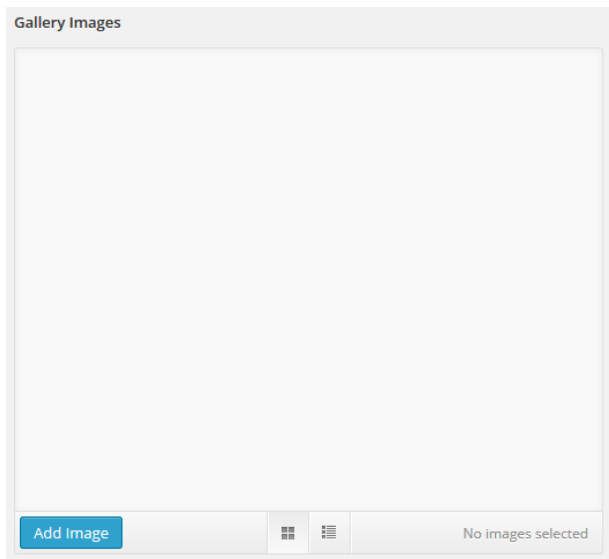
[Delete Permanently](#)

[Update](#)

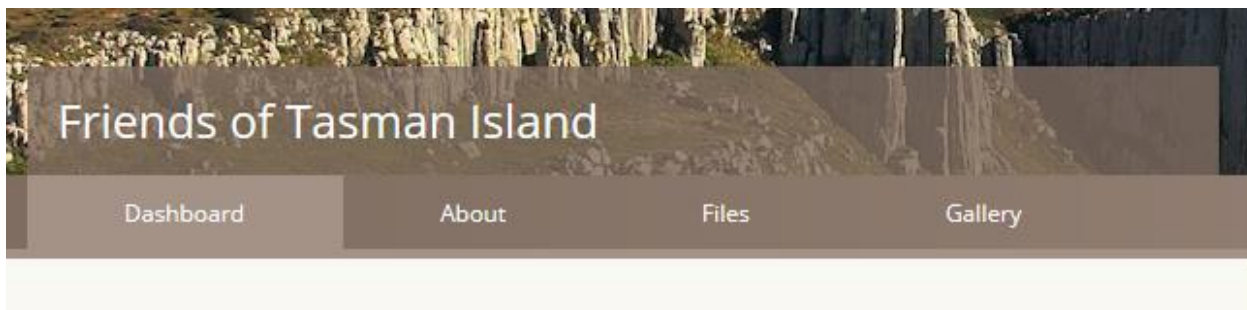
Select **[Update]**.

Done – just check the files on your Branch page to ensure that everything has been correctly updated and that the link to the new document works.





Adding gallery images



The gallery image item allows you to load images to your branch page. Adding an image here automatically adds a gallery tab to your branch homepage.



Gallery Images



Author

Phil Wyatt

The author item simply shows who authored the page.

Whenever you make an edit of the page you MUST go back up to the top of the page and click the UPDATE button to save the changes.


Adding a news Item

News items are an easy way for you to communicate to the public and the wider Wildcare membership. As soon as you write a news post it will automatically appear on the home page of the Wildcare website. The last 4 articles will always be there before they disappear into the news archive ("See all news" button).

LATEST NEWS

JANUARY 20, 2015 /// FRIENDS OF MT FIELD


A COUPLE OF TASKS KNOCKED OFF THE LIST



read more

JANUARY 20, 2015 /// WILDCARE INC OFFICE


WILDCARE ANNUAL GENERAL MEETING



read more

JANUARY 15, 2015 /// GET OUTSIDE WITH COMMUNITY (SOUTH)


GET OUTSIDE HAS A WILD AND WET START TO THE YEAR.



read more

JANUARY 14, 2015 /// FRIENDS OF DEAL ISLAND

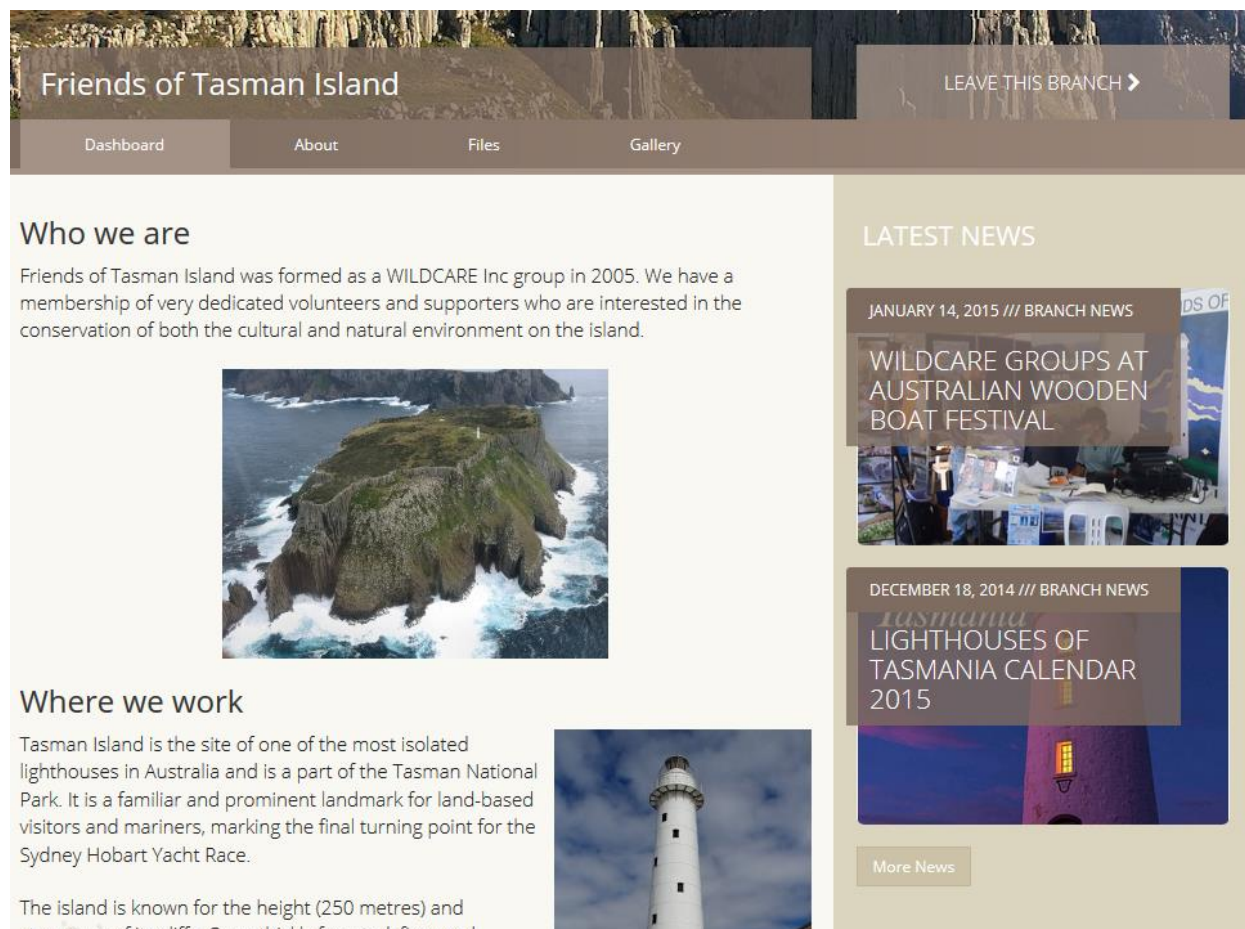
WILDCARE GROUPS AT AUSTRALIAN WOODEN BOAT FESTIVAL



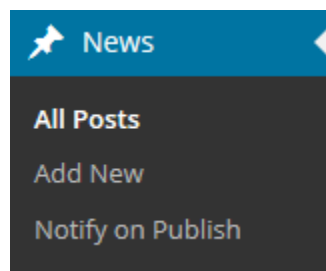
read more

See all news

Likewise, any article that you write can also appear on your branch page. In this case the last two articles will always show on the right hand side of your branch page. As you add more articles they will progressively drop down the list until they end up in the overall branch archive ("More News" button).



The News menu item has three links



All posts shows all the previous posts (that your permissions allow you to see), Add new is for starting a new post and "Notify on Publish" is a predesigned email setup that we will use later to notify branch members that an article has been posted to the website.

If you are ready to write an article then click “Add new” and follow along with what each of the items mean.

Many of the components will look similar to the branch pages.

Edit Post

Wildcare groups at Australian Wooden Boat Festival

Here we have the title of the article. Keep this snappy and short. It's the text that appears with the article on the home page and your branch news page. It only needs to be 5 or 6 words to catch people's imagination and make them click on the article.

Access restrictions

Enforce read access

Type and choose ...

Only groups or users that have one of the selected capabilities are allowed to read this News Post.

☒ Show groups

Here we want to restrict the access to editing of the article. If you start typing in the “Type and choose” area you will get a list of the branches for which you have permissions. Select the appropriate one. This makes sure that not all presidents get to access the article for editing

Access restrictions

Enforce read access

friends_of_tasman_island_content

(Friends of Tasman Island Presidents, Access all branches)

Only groups or users that have one of the selected capabilities are allowed to read this News Post.

☒ Show groups

Add Media

CiviCRM

Visual

Text

B

I

ABC

☰

☰

“

—

☰

☰

☰

🔗

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11th Australian Wooden Boat Festival

Saturday 7th, Sunday 8th & Monday 9th February 2015



At the Australian Wooden Boat Festival

Wildcare groups, the Friends of Deal, Maatsuyker and Tasman Islands, will be on the Hobart waterfront for the three days of this spectacular gathering of all things nautical. On show will be displays of the history of these remote islands as well as the work of their dedicated volunteers, preserving our maritime heritage.

Entirely self-funded, FoDI, FoMI and FoTI need to raise funds to continue their work and will have merchandise on sale including the ever popular Lighthouses of Tasmania calendar, gift cards, beanies and cook books etc.

SEE YOU THERE!

For more information click on this link. [AUSTRALIAN WOODEN BOAT FESTIVAL 2015](#)

p

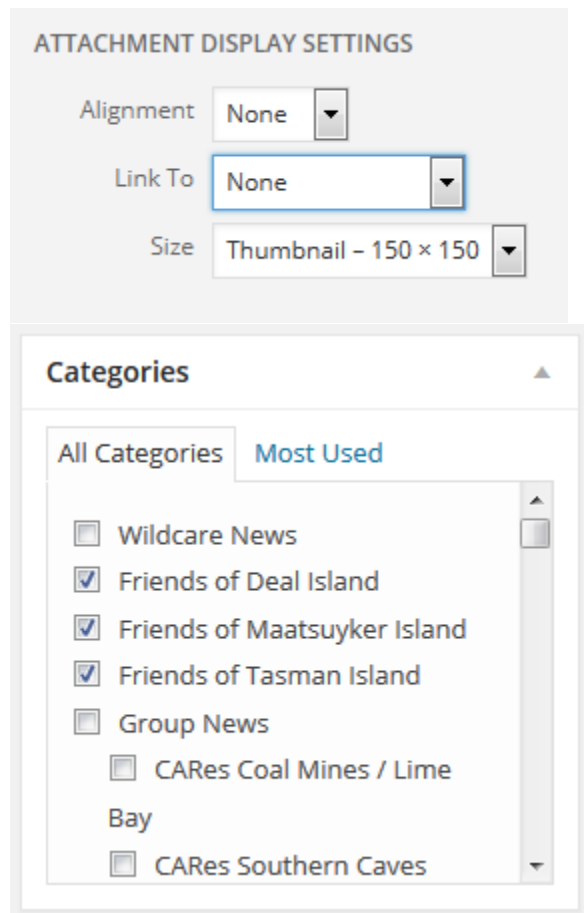
Word count: 125

Last edited by Sample President on January 27, 2015 at 2:10 pm

You can now write your article. Again try and keep the formatting simple with just small bits of bold text if required. You might also link to other websites if appropriate. Always make website links open on a new page..

In this case an image has also been added and because a caption was added when it was loaded it's already pre-formatted in a box with the caption. Images in articles are great because when people share them via social media it has the image showing rather than just boring text.

To add an image, simply place your cursor where you want the image to be and click the “Add Media” button. Its best if the image is at the start of a paragraph. If selecting from the media library ensure you set the image size.



The image shows two panels from a CMS interface. The top panel, titled "ATTACHMENT DISPLAY SETTINGS", contains three dropdown menus: "Alignment" set to "None", "Link To" set to "None", and "Size" set to "Thumbnail - 150 x 150". The bottom panel, titled "Categories", has two tabs: "All Categories" and "Most Used". The "All Categories" tab is active, showing a list of categories with checkboxes. The categories are: "Wildcare News" (unchecked), "Friends of Deal Island" (checked), "Friends of Maatsuyker Island" (checked), "Friends of Tasman Island" (checked), "Group News" (unchecked), "CAREs Coal Mines / Lime Bay" (unchecked), and "CAREs Southern Caves" (unchecked). A scrollbar is visible on the right side of the category list.

Categories are the places where the news article will appear. In this case the article relates to three groups so it will appear on each of these three branch pages.

Initially you will need to search the list for your branch but after that it will be at the top of the list as well as in the “most Used” tab.

In general you should only load the article to your branch page.

Tags

Separate tags with commas

[Choose from the most used tags](#)

Tags are keywords that can be added to articles to make them easy to find via searches. Separate words with commas. You can see some of the common tags by clicking on the “most used tags” link.


News branch

Branch

Friends of Tasman Island

(CHECK – get a name change to Email Notification) News Branch – this field is used to identify the branch that will be used for email notifications about the article. This will be covered when we get to the publish stage of this item.

Featured Image





[Remove featured image](#)

The featured image is the one that is used as the background for the article on the home and branch pages. Again, it’s best if this is a cropped or resized image about 1000pixels wide or high. If it’s a big picture then it will takes ages to load on the website (or phone/tablet).


Publish

Preview Changes


 Status: **Published** [Edit](#)



 Visibility: **Public** [Edit](#)




 Revisions: **13** [Browse](#)



 Published on: **Jan 14, 2015 @ 14:36**
[Edit](#)

Add Notification



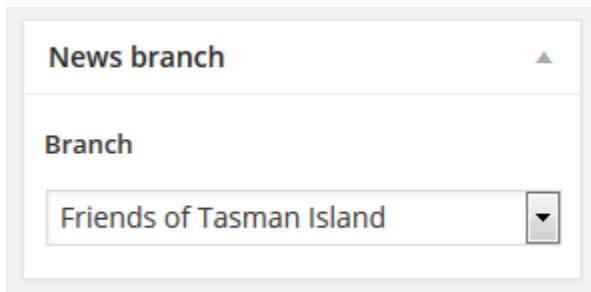
 SEO: **N/A** [Check](#)

Update

Be sure to press the update button after any edits are made to the page.

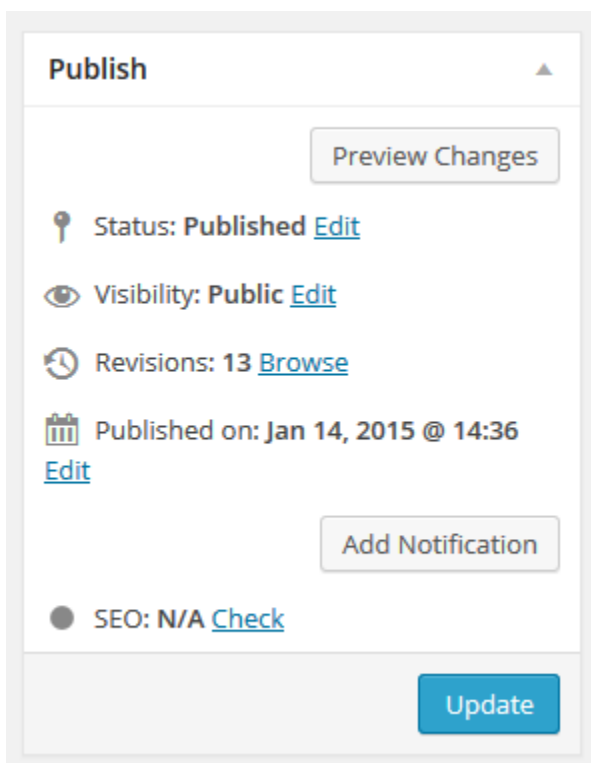
Sending an email about a news post

Before sending an email to members, check to ensure the article is correct and showing as you expect on the website. Make any adjustments before notifying members.



A screenshot of a web interface showing a dropdown menu titled "News branch". Below the title, there is a label "Branch" and a dropdown box containing the text "Friends of Tasman Island". A small upward-pointing triangle is visible to the right of the "News branch" title.

This item sets which branch members will get a notification. The list will be filtered by the branches you administer. Set the branch first.



A screenshot of a web interface showing a "Publish" panel. At the top, there is a button labeled "Preview Changes". Below this, there are several status indicators with icons and links: "Status: Published [Edit](#)", "Visibility: Public [Edit](#)", "Revisions: 13 [Browse](#)", and "Published on: Jan 14, 2015 @ 14:36 [Edit](#)". At the bottom of the panel, there is a button labeled "Add Notification" and a radio button next to "SEO: N/A [Check](#)". A large blue "Update" button is located at the bottom right of the panel.

You will notice when you are on the news post page there is a Notification button near the update button.

If you click on it you will see that a predefined email message has been created from the words and title of your article.

Send a Notification

Template

Subject

Friends of Tasman Island: A new article is available

Template

Visual Text

B *I* ABC

Paragraph

A new article, Wildcare groups at Australian Wooden Boat Festival, has been posted to Wildcare News.

Read the new article here [Wildcare groups at Australian Wooden Boat Festival](#), and be sure to share it with your friends.

P

Back

Preview

If you wish to, you can add more text the email but don't rewrite the article as people will get to see that when they click on the link. This email is really only meant as an alert to people. It gets them back to the website to check out what else is happening.

Click on the preview button and it will show you all the people who will receive the email and what the message looks like. You will notice that it will look like its coming from you. This way they can reply to the email and you will get the emails rather than Wildcare. You also get to see who has not listed an email address with Wildcare! They will be all the ones starting with wildcare+badmail...

If you are happy with the look and feel of the message then press “Log and send immediately”. This will log that the email has been sent. It may take some time to send the message and you will get an alert saying it’s complete.

When you go back to the main news post page for the article it will be listed in the Notification log. Refresh your page (F5), if you used the back buttons, to ensure you are looking at the updated page. You should see the “Publish Notification Log” has some details listed. This is so you can see that the item has gone, and it reminds you not to send it again!

Despite the button saying “send immediately” we have in place a system that runs email processes on a schedule. It may take up to 35 minutes for the email to be sent. This is necessary because if we send 1,000’s of emails all at once the system may crash. Remember you may not be the only one sending emails at that moment.

If you think something has failed to send, please contact the webmaster rather than re running the notification – we don’t want to spam members with too many emails! You can also read the notification log after it has been sent to check on message details.

The most common reason someone does not get the email is because they are not a paid up member, they have not listed an email address with Wildcare, or they have not joined your branch.

Publish Notification Log				
1 item				
Date	From	To	Subject	Body
Jan 21, 2015 @ 16:26	webmaster@ wildcaretas.or g.au	Sample Member <jamesb+10@ ionata.com.au >	Friends of Mt Field: A new article is available	A new article, A Couple of Tasks Knocked off the...

Submitting a Calendar event (Basic Access)

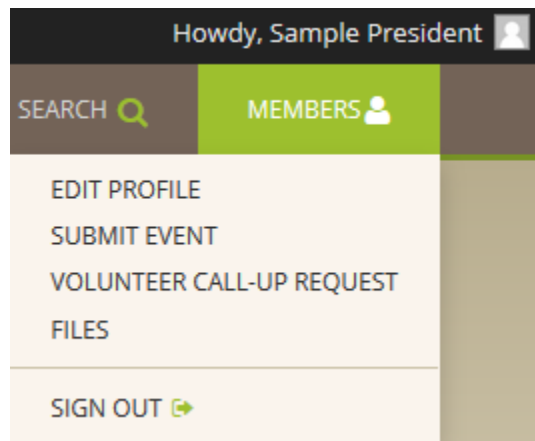
Events, working bees, training opportunities are all an integral part of Wildcare operations. It's important that these events are on the calendar well in advance so members can organize their time.

The new website has a much more complex system for the handling of events. It can handle paid events, conferences, email alerts, reminders, waiting lists, online registration to name but a few features!

Because of this complexity we are initially asking Presidents to submit events by form and they will be loaded by the webmaster. We will progressively change this as people get familiar with the system.

You should allow at least 48hours from the time of your submission until the event appears on the calendar. This assumes that all the required details are supplied.

You can submit an event from the Members menu item



The form is quite lengthy but I will explain why each item is required.

Event Type *

General activity ▼

Participant Role *

Volunteer ▼

Event Title *

This title appears on the calendar

Event type is pretty obvious. Most activities will be a General Activity. Other options include general notice (for things like board meeting dates), Training for specific events about training and First response which is generally for things like whale rescues.

Participant role will always be that of volunteer. IN the future we may add other roles (for things like conference presenters etc)

Event title is the text that is seen on the calendar. It should be short and sharp and maybe include the basics of what the event is about – Trackwork at Mt Field, Weeding at XXX reserve, Orchid Monitoring at YYY reserve. It needs to be enough to get someone to click on the item to check it out. The same text is used on the day, week and month views of the calendar.

5	6	7	8	9	10	11
	9a Thark Ridge Trackwork 10a Website Training 5p Website Training via Skype					
12	13	14	15	16	17	18
	10a Website Training 5p Website Training via Skype	5p Get Outside - welcome BBQ and evening stroll			8:30a Vale of Belvoir Monitoring 12a Lake Belcher Trackwork	
19	20	21	22	23	24	25
	10a Website Training 5p Website Training via Skype		6:30p Caring For Wildlife		9a Monitoring Threatened Orchids 9a Orchid Monitoring - Snug Tiers	

Event Summary *

Complete Description *

Event summary is used on the home page as a bit of leading text to flesh out what the event is about. Again, keep it short but offer enough to interest people. It only needs to be one sentence really.

3
FEB

Wellington Park Weeding

Weeding in the area around Goat Hills – Montrose.

[More information](#)

The above shows the title and event summary.

The complete description is what shows when some presses on the More information link

Wellington Park Weeding

This is one of our regular weeding events to continue working on the Goat Hills infestations.

Meet at the end of Upper Montrose Road at 9:00am and we are usually back at the road by 3:00pm

All tools supplied but please bring your own sunscreen, lunch and a hat.

Your Registration Info

First Name	Sample
Last Name	Member
Email Address	jamesb+10@ionata.com.au

Register >>



This is the full view that a member will see when they are logged in. It shows the details of the event as well as the details that will be used should they register for the event. If they are not logged in they get a different view suggesting they join or login

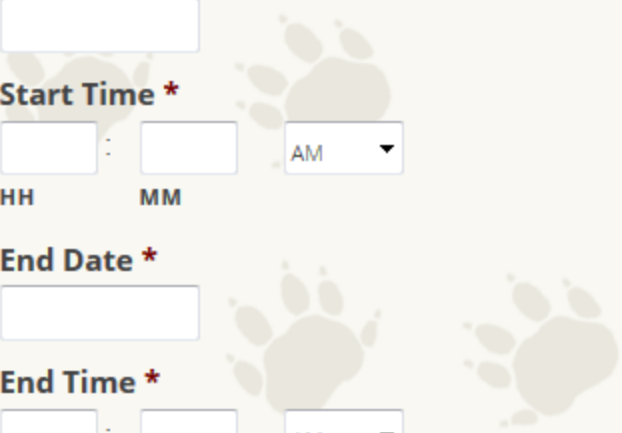
Wellington Park Weeding

This is one of our regular weeding events to continue working on the Goat Hills infestations.

Meet at the end of Upper Montrose Road at 9:00am and we are usually back at the road by 3:00pm

All tools supplied but please bring your own sunscreen, lunch and a hat.

To register for this event, you have to be a member. Please [login](#) or [Join Wildcare](#).



Start Date *

Start Time *

 : ▼
 HH MM

End Date *

End Time *

 : ▼
 HH MM

Branch Name *

These fields are pretty obvious. This should be the start time of the event at the desired meeting place. We use the dates and time to show them on the correct days as well as being able to use them to calculate the hours that volunteers have worked. The webmaster will also use these to flesh out the full description of the events if required.

Eventually we will list upcoming events on branch pages so we need to know which branch is organizing the event

Event Meeting Location

Address

Street Address

Address Line 2

City **ZIP / Postal Code**

Pretty obvious, where should people meet to be part of this event? The first line should be an actual address, if you can possibly do it, as we can also use it for a map of event locations (upcoming enhancement). The second line can be a description (corner of Bling and Blong Streets)

Fees

Paid Event

- ☐ Yes
- ☒ No

The system has the capacity for paid events. Please contact the webmaster well in advance for these events as we need to do lots of additional configuration to spell out pricing and payment methods. Clicking yes will open up a few more fields that need to be filled out.

Online Registration

Allow Online Registration?

- ☒ Yes
- ☐ No

Registration Start Date

Registration Start Time

<input type="text"/>	:	<input type="text"/>	AM ▼
HH		MM	

Registration End Date

Registration End Time

<input type="text"/>	:	<input type="text"/>	AM ▼
HH		MM	

Co-ordinator Email *

A confirmation email will be sent to the member when they register. An email will also be CC'd to the event coordinator

This allows people to register online quickly and easily. All events should have this available so we can record volunteer participation.

When people register we can send a confirmation email to both the person and the coordinator so you must enter the coordinators email address for any required followup. **NOTE: some events already posted may not have this implemented!**

Registering for an event

Encourage members to register online for events. They will see a screen similar to this when they register. It gives more details on the location of the event and also a link to a map.

Over time we may make these details on the full event page.

Wellington Park Weeding

Your registration has been processed successfully.

Event Information

Wellington Park Weeding

When February 3rd, 2015 9:00 AM through 3:00 PM

Location Upper Montrose Road
End of the road
Montrose, TAS 7010
Australia

[Map this Location](#)

Participant Role

Volunteer

Participant Information

Your Registration Info

First Name	Sample
Last Name	Member
Email Address	jamesb+10@ionata.com.au

[» Back to "Wellington Park Weeding" event information](#)



Clicking on the map link shows the event meeting place location (we are trying to get a better pin point for the event location rather than the tiny blue building)

Checking who has registered for events

If you return to the event page after you have registered for an event you will get a slightly different view.



Wellington Park Weeding

This is one of our regular weeding events to continue working on the Goat Hills infestations.

Meet at the end of Upper Montrose Road at 9:00am and we are usually back at the road by 3:00pm

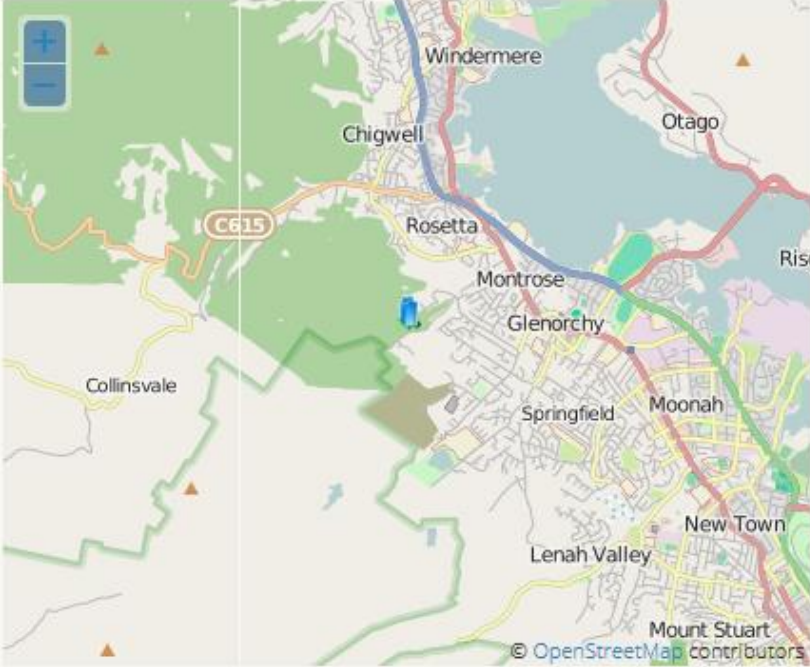
All tools supplied but please bring your own sunscreen, lunch and a hat.

Oops. It looks like you are already registered for this event. If you want to change your registration, or you feel that you've gotten this message in error, please contact the site administrator.



When February 3rd, 2015 9:00 AM through 3:00 PM

Location Upper Montrose Road
End of the road
Montrose, TAS 7010
Australia



[Show large map](#)

See the little magnifying glass under the yellow block of text? Click on that and you will be able to see who is registered for the event. Don't bother with the spanner icon (we are trying to remove that)

44

Version 6.7

Wellington Park Weeding

This is one of our regular weeding events to continue working on the Goat Hills infestations.

Meet at the end of Upper Montrose Road at 9:00am and we are usually back at the road by 3:00pm

All tools supplied but please bring your own sunscreen, lunch and a hat.

[CiviCRM » CiviEvent Dashboard](#)

▸ Edit Search Criteria

1 Result

Event = Wellington Park Weeding ...AND...
Participant Status IN Registered or Attended or Pending from
pay later or Partially paid or Pending refund

Select Records:

☒ The found record

[Actions](#)

	Participant	Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role
	 Member, Sample	Wellington Park Weeding	(no fee)		January 27th, 2015	February 3rd, 2015	Registered	Volunteer

Access Keys: [?](#)

From this screen you can also do a heap of other things – tick next to the person’s name and then click on the Actions link for more options.

This is also where we change the status of participants from registered to “attended” after the event has been held.

Please be a little bit careful in here whilst you are learning what each action actually does!

Editing events

Editing of events is not available to Presidents. Contact the webmaster if any details are incorrect.

Delete Events

As there is seldom a need to delete events (and it has implications for other sections of the website) we do not allow Presidents to delete events. If you really need to delete an event then contact the webmaster.

Submitting an event (Advanced Access)

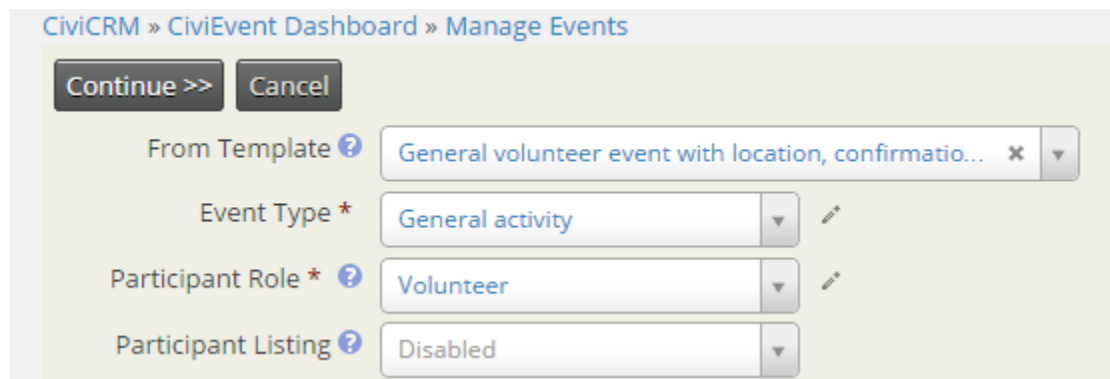
Members with President (Advanced Access) can enter their own events on the calendar system in real-time.

This is done via CivCRM, Events, and New Event. You can also copy an existing event and just update the dates etc which can save you time if you hold events at regular intervals at the same locations. To use an existing event you will need to go to the Manage Events menu item.

New event

After pressing New Event, select the template “General volunteer event”. This is setup with a bunch of fields already entered. It includes online registration and confirmation emails to the participant and the event organizer.

Leave the first four fields as per below.



The screenshot shows the 'Manage Events' page in CiviCRM. At the top, there is a breadcrumb trail: 'CiviCRM » CiviEvent Dashboard » Manage Events'. Below this are two buttons: 'Continue >>' and 'Cancel'. The form contains four fields, each with a label, a required indicator (star), and a help icon (question mark):

- From Template**: A dropdown menu showing 'General volunteer event with location, confirmatio...' with a close button (X) and a dropdown arrow.
- Event Type**: A dropdown menu showing 'General activity' with a dropdown arrow and an edit icon (pencil).
- Participant Role**: A dropdown menu showing 'Volunteer' with a dropdown arrow and an edit icon (pencil).
- Participant Listing**: A dropdown menu showing 'Disabled' with a dropdown arrow.







You now need to decide about a title, a basic summary and a full description for your event










Event Title *

Please use only alphanumeric, spaces, hyphens and dashes for event names.






Event Summary

Complete Description





B **I** **S** **I_x**

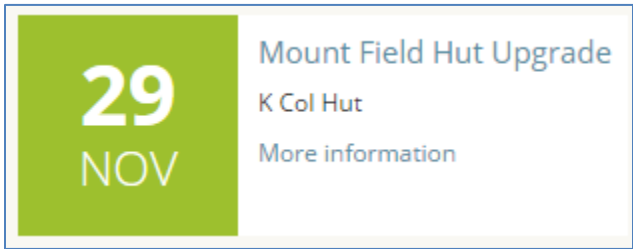


Styles ▼ Format ▼ ?

The event title appears in the calendar so it needs to be explicit enough to give members an idea about the event. It should be a short title. The event summary appears on the home page of the website when the event is featured. The complete description is viewed when someone clicks on the event in the calendar or clicks on More Information on the home page.



Event titles showing on Calendar



Event title and summary when featured on home page

Mount Field Hut Upgrade

Adding lining to hut

Your Registration Info

First Name Philip

Last Name Wyatt

Email Address webmaster@wildcaretas.org.au

☒ Register

f t e

Title and description when member has clicked on the event

Next we enter the dates and time and give some options for maps, social media sharing etc. Be sure to add your branch at the bottom. This also ensures that the event appears on your branch page. **The event must be public to appear on the calendar.**

Start Date 01/01/2016 Time 09:00AM x

End Date / Time 01/01/2016 Time 03:00PM x

Max Number of Participants 🔑

☒ Include Map to Event Location ?

☒ Public Event ?

☒ Allow sharing through social media? ?

☒ Is this Event Active?

▼ **Branch Details**

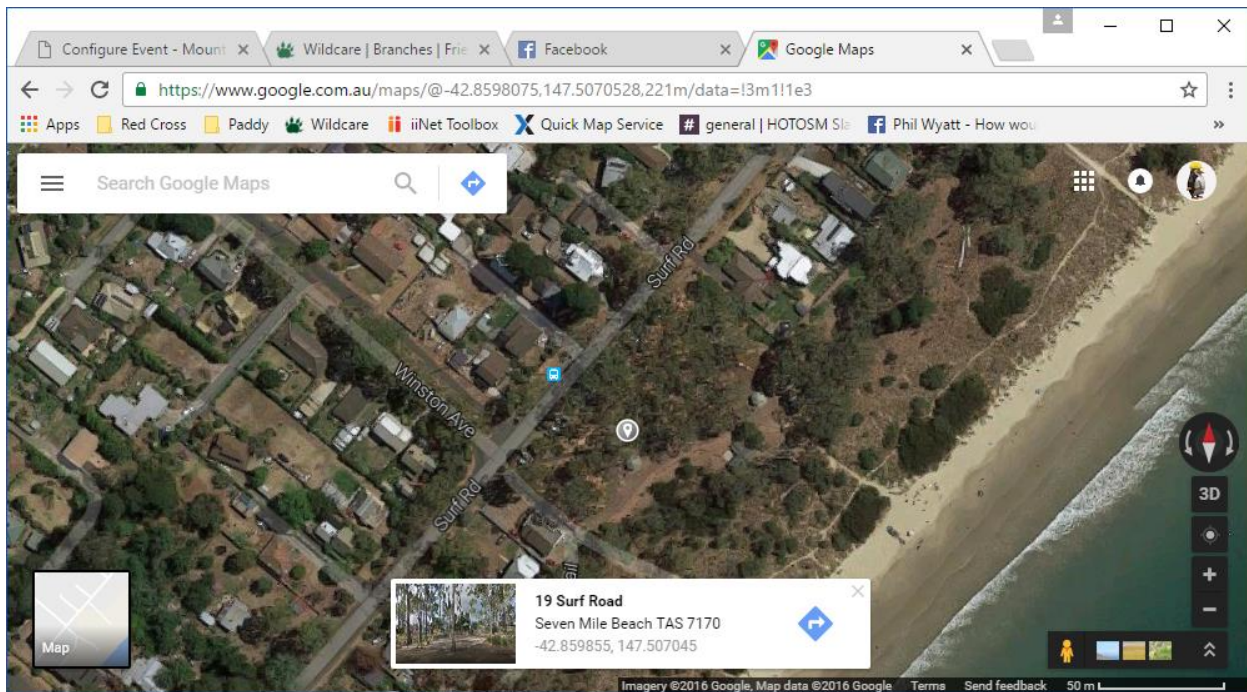
Branch Name Friends of Mt Field x 🔍

Click the continue button when you are ready to add location information and registration details

✓ Continue

Location data is added so that a map can be produced for the member when they register for the event. This is especially helpful for new members so please take the time to add a valid address. A quick way to get a valid address is to use google maps - <https://www.google.com.au/maps> Simply click on the location where you want people to meet and the address will be displayed. Use that in CiviCRM for the address details.

The example below is the park at Seven Mile Beach



You can also reuse addresses that are already in the system. This is handy when you always meet at the same locations

NOTE – do not add any email or phone numbers! These relate to the ADDRESS not the event organiser. We will add your contact details in registration section.

Always use the first line of the address for the real address and the supplemental Address for things like Visitor Centre, Car Park, Junction of Road X and Y

✓ Save

✓ Save and Done

✕ Cancel

Choose Location

☐ Create new location

☒ Use existing location

Use Location

66 Lake Dobson Road :: National Park :: Ta ▼

This location is used by 27 other events. Modifying location information will change values for all events.

Address

Street Address ?

66 Lake Dobson Road

Supplemental Address 1 ?

Visitors Centre

Supplemental Address 2

City

National Park

Postal Code

7140

Suffix ?

Country

AUSTRALIA x ▼

State/Province

Tasmania x ▼

Email

Phone

ext.

Phone Type

Phone ▼

⚙

ext.

Phone Type

Phone ▼

⚙

Show Location? ☒

Uncheck this box if you want to HIDE the event Address on Event Information and Registration pages

✓ Save

✓ Save and Done

✕ Cancel

The last details to fill in are the online registration details. The template has all the default settings however we just need to change the 'CC Confirmation To' email address

Replace yourname@youremail.com with the email address of the event organiser. This ensures that they get emails when people register. The member will also get an email with the details of the event.

Do not change the 'Confirm From Email' address (wildcare@wildcaretas.org.au). This is the only valid email address the system is allowed to use. If you change it, you will not receive any notifications as people register and people registering will also not get an email confirming their registration.

▼ **Confirmation Email**

Send Confirmation ☒ Yes ☐ No
Email? *Do you want a registration confirmation email sent automatically to the user? This email includes*

Text

Thanks for registering for this Wildcare event - we will be in touch if there are any changes to the event

Additional message or instructions to include in confirmation email.

Confirm From Name *

Wildcare Inc (No Reply)

FROM name for email.

Confirm From Email *

wildcare@wildcaretas.org.;

FROM email address (this must be a valid email account with your SMTP email service provider).

CC Confirmation To

yourname@youremail.com

You can notify event organizers of each online registration by specifying one or more email addresses

BCC Confirmation To
You may specify one or more email addresses to receive a blind carbon copy (bcc) of the confirmation email

Make sure you save everything along the way and once you have finished everything I suggest that you go to the calendar and check that everything is in order.

UPCOMING EVENTS

29
NOV

Mount Field Hut Upgrade
K Col Hut
[More information](#)

17
DEC

Mount Field Site Rehabilitation
Junees Caves Track
[More information](#)


Mount Field Hut Upgrade

Oops. It looks like you are already registered for this event. If you want to change your registration gotten this message in error, please contact the site administrator. You can also [register another party](#)

K Col Hut
Adding lining to hut

When November 29th, 2016 6:00 AM through 3:00 PM

Location 66 Lake Dobson Road
Visitors Centre
National Park, TAS 7140
AUSTRALIA



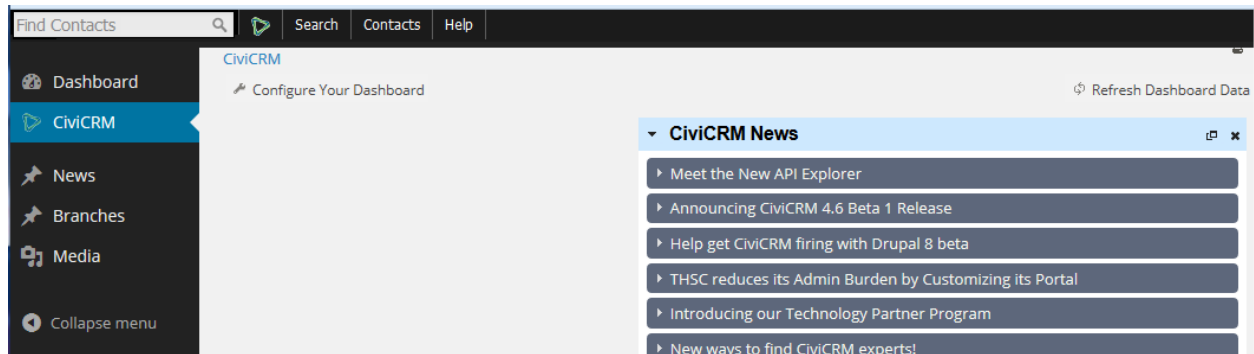
The map shows a red pin marking the location of the hut upgrade. The map includes labels for "Land of the Giants Caravan Park", "Gordon River Rd", "Russell Falls Aquaculture PTY Ltd", and road numbers "C609" and "B6". Map controls like "Map", "Satellite", and zoom buttons are visible.

[Show large map](#)

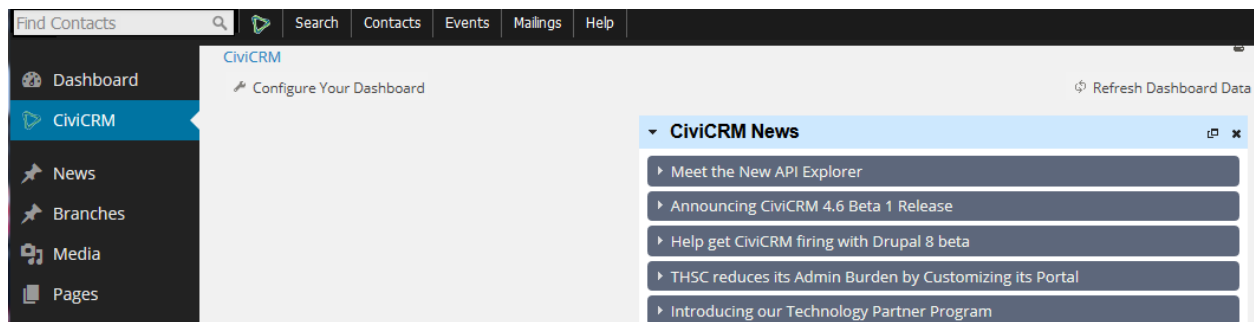
CiviCRM Menu

When you click on the CiviCRM menu on the left you will get some extra menu items in the black bar at the top of the page . You may also have some extra items on your CiviCRM dashboard. These may not be of interest so simply close them with the black X .

Basic President View



Advanced President View



Checking a members details

As you have access to the entire Wildcare database (read only) it is possible for you to see contact details of any member. Start typing their surname into the “find contacts” box at the top and a list (of up to 9 members) will be presented. If you want to further narrow down the search you can add a comma, then a space and then the first name.

Examples – Smith, A or Smith, an

You may also come across some members who have an email address like

wildcare+badmail-xxxxxx@wiuldcaresetas.org.au

This is because the website login system requires an email address. If a member does not have one then we create a fake one for them. The xxxxxx’s represent their member number.

At times you may also find some member records that have little STOP signs or text **On hold, Opt out, Do not email or Do not mail** in red. This has generally come about because we have had returned or bounced emails, or mail returned after bulk mailout. There is also normally a note attached to the member details telling why this stop may be in place (ie Wildtimes mailout Feb 2015 returned)



Please respect these messages in all your communication with the member.

If they are one of your branch members you might ask them to update their email or address on the website

Contacts Menu

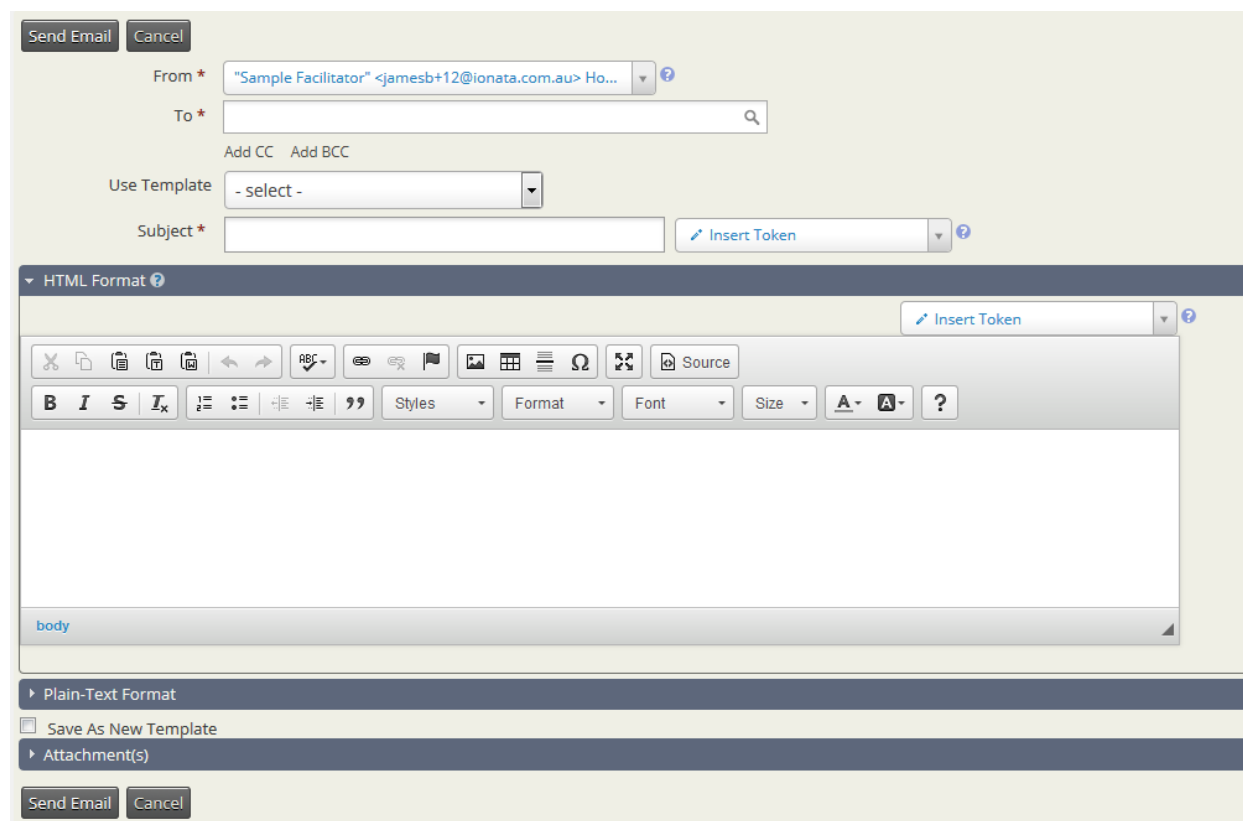
The contact menu is where we can record some contact with a member (say a meeting or a phone call), write and email to an individual member or maybe a selection of members plus the place where we can send a bulk email to branch members.

New Activity

Detail to follow

New Email (to just a couple of people)

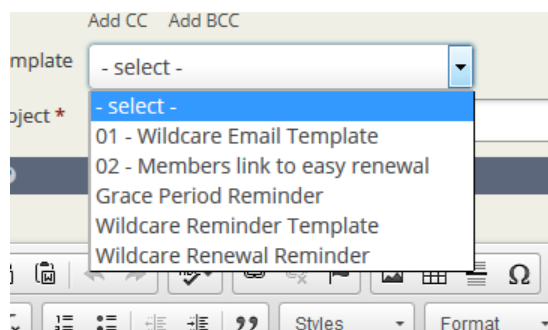
This is where you can email anyone in the Wildcare database.



Your name will be listed as the sender (From)

You can commence typing someone's name in the To box and then select them when you have the correct person. Keep adding the required names

You can use the 01 – Wildcare email template for the basis of your message. This comes prefilled with some details (like firstname, lastname and member number etc which change dynamically for each email)



Add a subject and your text.

You should NOT update the template or save as a new template.

We also do not want people attaching files to emails. A more efficient way is to load a large file to your branch page and then send people a link to it. You might even do this via a news article, with member notification, rather than by an email.

Once you have everything in place hit the Send button. There is no preview of the email before sending. **It also appears that you don't get an email sent to yourself (if you are part of the branch).**

A record will then be attached to your member activity log with the details of the email and who it was sent to. This allows our office staff, who may be answering phone queries, to have some idea of past interactions' with every member.

Manage Groups

Here you get to find some “smart groups” which is a collection of members that fit a certain criteria. For instance we could have smart groups for all those folk in a particular suburb or state.

Obviously we use this to get all the members of a particular Branch.

A short overview of how a member’s status changes over time.

- When someone joins Wildcare their membership status is set as “New”
- After 3 months it automatically becomes “Current”
- One year after joining (or renewing) the membership ends but we place it into a “Grace” period for 28 days
- After that 28 days the membership is considered “Expired”

We have automated emails that tell people when their membership is about to end (6 weeks beforehand). We also give them a gentle reminder when it goes into the Grace period. They receive nothing when it expires.

When we want to contact members we want to make sure we are contacting the right folks. If we just selected all those people who joined Branch XXXXXXXX we could get people who were members years ago but have long lost interest in Wildcare.

We have made “smart groups” for each branch such as in the example below.

Name of the group	Who is actually in the group
WILDCARE Friends of GIS	This is everyone who has ever made the decision to “Join the branch” on the main branch page of the website.
Friends of GIS – Current and New (Smart Group)	These are the current financial members
Friends of GIS - Expired in the last 12 months (Smart Group)	These are people who have been members of the branch in the last twelve months
Friends of GIS - Grace and Expired (Smart Group)	These are all the Expired and Grace members (including those above and others from years past)

In general your emails will be to the Current and New members.

You don’t need to email or remind those members that have fallen into Grace or expired, because we do that automatically.

The extra lists are provided for your interest only. Extra emails sent from these lists could be considered SPAM and may get Wildcare blacklisted on various servers. If you do not see these additional groups please email the webmaster on webmaster@wildcaretas.org.au – he may just have forgotten a few!

Check current membership of your branch

Selecting the Current and New smart group will display the details of these members

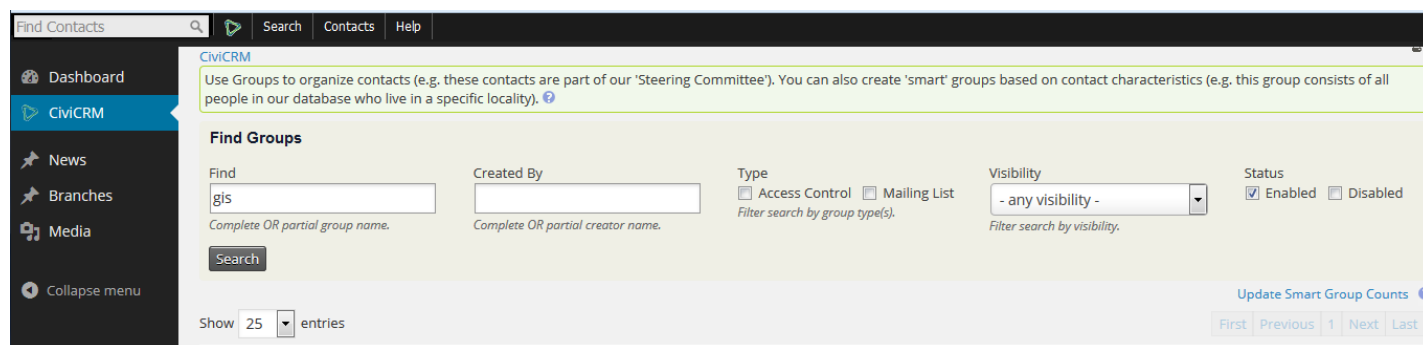
Check past membership of your branch (expired in the last year – 365 days)

Selecting “Expired in the last 12 months” will show details of these members

Send your members email notices

If you wish to send an email to your “Current and New” members then click on the Manage Groups link under Contacts. This interface is good for sending up to about 50 emails at once. This is below the number of current and new members in most branches. If your group has over 50 then you may need Advanced access to use a different mailing technique.

You will be presented with a search page. Enter a word, or couple of words in the find box and press the search button (you can't just press enter)



You should see a list of groups that match your search criteria. I am sure you will figure out the required keyword to quickly access your branch.

To see members details click on the Contacts link on the right hand side.

The normal group to use will be the Current and New (Smart Group)

Name	Count	Created By	Description	Group Type	Visibility	
Friends of GIS - Current and New (Smart Group) <i>Child of: WILDCARE Friends of GIS</i>	17	Wyatt, Phil	✎	Mailing List	User and User Admin Only	Contacts
Friends of GIS - Expired in the last 12 months (Smart Group) <i>Child of: WILDCARE Friends of GIS</i>	5	Wyatt, Phil	✎	Mailing List	User and User Admin Only	Contacts
Friends of GIS - Grace and Expired (Smart Group) <i>Child of: WILDCARE Friends of GIS</i>	9	Wyatt, Phil	✎	Mailing List	User and User Admin Only	Contacts
WILDCARE Friends of GIS <i>Child of: CARes Groups</i>	729	Baker, James	✎		Public Pages	Contacts

You will be presented with details of each member.

Now that we have a list of these members we need to decide to which members we want to send the email. You can either tick the box next to individual members to select just a few members, or select “all xx records”

17 Contacts Contacts IN Friends of GIS - Current and New

Select Records: ☒ All 17 records ☐ 0 Selected records only

A B C D E F G H I J K L M N O P Q R

✕ Reset all selections

<input checked="" type="checkbox"/>	Status	Name	Address
<input checked="" type="checkbox"/>	Smart
<input checked="" type="checkbox"/>	Smart
<input checked="" type="checkbox"/>	Smart

Once we have selected our recipients we now click on the “Actions” button to decide what we want to do with those recipients. The list is long but we need to scroll down to “Email – send now (to 400 or less)”

If you need to send more than 400 emails please contact the webmaster@wildcaretas.org.au

Select Records: ☐ All 33 records ☐ 0 Selected records

☒ Actions

- Add activity
- Add relationship - to household
- Add relationship - to organization
- Communication preferences - alter
- Delete contacts
- Delete permanently
- Email - schedule/send via CiviMail
- Email - send now (to 400 or less)

We are then back to our standard email interface where you can select your template, write out your text and then send the email. You should NOT update the template or save as a new template.

Again, we do not want people attaching files to emails. A more efficient way is to load a large file to your branch page and then send people a link to it. You might even do this via a news article, with member notification, rather than by an email.

Once you have everything in place hit the Send button. There is no preview of the email before sending. **You will get an email to yourself if you are part of the branch (and within the smart group ie Currently financial)**

A record will then be attached to your member activity log with the details of the email and who it was sent to. This allows our office staff, who may be answering phone queries, to have some idea of past interactions' with every member.

When you hit send it can take some time for the screen to refresh. It may even go blank! Don't go back in your browser as it may send the email again. We will keep an eye on this and see if we can remedy the situation if it occurs frequently.

Identifying new branch members

I would like to thank Glen Hayhurst for this contribution.

It's useful to be able to identify people that have recently joined your Wildcare branch. For example, you might like to be able to welcome new members with details of your branch's work, together with an invitation to the next working bee while they are still keen. This can be done using CiviCRM as shown below.

Identifying People Who are Both New to Your Branch and Wildcare

To identify those people who are both new to your branch and who are also new Wildcare members complete each of the steps in this procedure:

Step	Action
1	In CiviCRM select Contacts > Manage Groups , locate your branch and select your Current and New (Smart Group) .
2	Select all the records for your branch.
3	Select the Action Export contacts .
4	Select Select fields for export .

5 Select **Saved Field Mapping** “Last Name - First Name - Email”:

Export All or Selected Fields (step 2 of 3)

77 records selected for export.

☐ Export PRIMARY fields
☒ Select fields for export

Use Saved Field Mapping

Last Name - First Name - Email ▼

6 Select .

Result:

Select Fields to Export (step 3 of 3)

Using Field Mapping: Last Name - First Name - Email

Fields to Include in Export File

- Primary Active member ▼

Last Name ▼

- Primary Active member ▼

First Name ▼

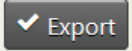
- Primary Active member ▼

Email ▼

Primary ▼

- Primary Active member ▼

Created Date ▼

7	<p>Select .</p> <p>Result: You'll get a pop-up prompting you to save the export file CiviCRM_Contact_Search.csv.</p>
8	<p>Save the export file.</p>
9	<p>Open the export file CiviCRM_Contact_Search.csv using either a spreadsheet program (eg Excel) or a text editor (eg Notepad or WordPad).</p> <p>Result: The names will be sorted in order of increasing contact_id. Your new branch members that have recently joined Wildcare will have the highest values of contact_id and will therefore be towards the bottom of the list. The Created Date for these more recent Wildcare members is the date that they actually joined Wildcare.</p>

Identifying All Your New Branch Members

The procedure above will allow you to easily identify only those new branch members who are also new Wildcare members. On its own, it won't allow you to also identify established Wildcare members who have only recently decided to join your branch. That's because contact_id in the export file represents the order in which people joined Wildcare (at least for the more recent members), *not* the order in which they joined your branch. Similarly, Created Date is the date of joining Wildcare (at least for the more recent members), *not* the date of joining your branch. To identify **all** your new branch members follow these steps:

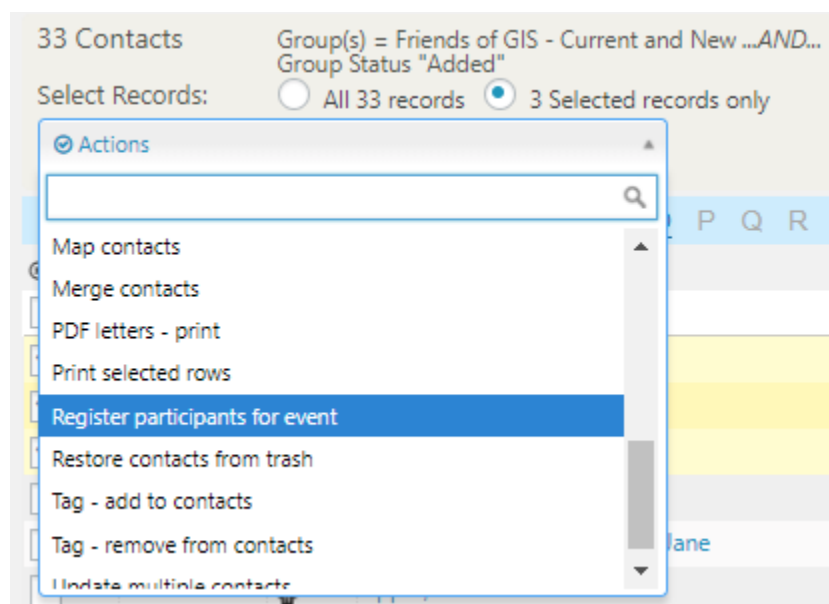
Step	Action
1	Complete Steps 1 to 8 in procedure (1) above, ensuring that you have saved the export file CiviCRM_Contact_Search.csv to a location that you'll be able to quickly return to in a few weeks' time.
2	Rename the export file to something that includes the current date eg Branch_Members_10.01.18.csv
3	In a few weeks (or whenever you want to search again for new branch members) repeat Steps 1 to 2 of this procedure (2).
4	Open both files in a spreadsheet program (eg Excel).
5	Copy and paste the new list alongside the previous one. Result: Any differences in alignment of names will be due to either people having joined or left your branch since the date of your previous export file so these people should be visually obvious.
6	Delete the older saved export file, leaving just the new one. Result: The new export file becomes the current list for comparison with the next one in a few weeks' time.

Please note – Members should not be sent emails (regarding wildcare events etc) outside of the Wildcare system. The Wildcare system records all communication with members so that we can ensure they are not being spammed by inappropriate material. It also allows us to investigate any claims of spamming as well as any blacklisting from ISP's.

Register group members to events

We have recently found out that it's possible to bulk add group members to events. It does have some limitations, but it works well if members have failed to register their intentions via the calendar of events.

Simply go to your new and current members in the usual way via CiviCRM, Manage Groups. You can then select the members that wish to attend an event and then use the action of 'Register participants for event'



You will then be asked to select the event that they are attending.

A screenshot of the CiviCRM registration form. It contains several fields: 'Event *' with a dropdown menu showing '- select event -'; 'Participant Role *' with a dropdown menu showing 'Volunteer'; 'Registration Date *' with a date picker showing '03/02/2018' and a 'Time' field showing '11:59AM'; 'Participant Status *' with a dropdown menu showing 'Registered'; and 'Event Source' with a text input field. Below the 'Event Source' field, there is a small text label: 'Source for this registration (if applicable)'.

The limitation to this procedure is that it must be done before the event. We are investigating how we might get around this issue.

Mailings (Advanced Access)

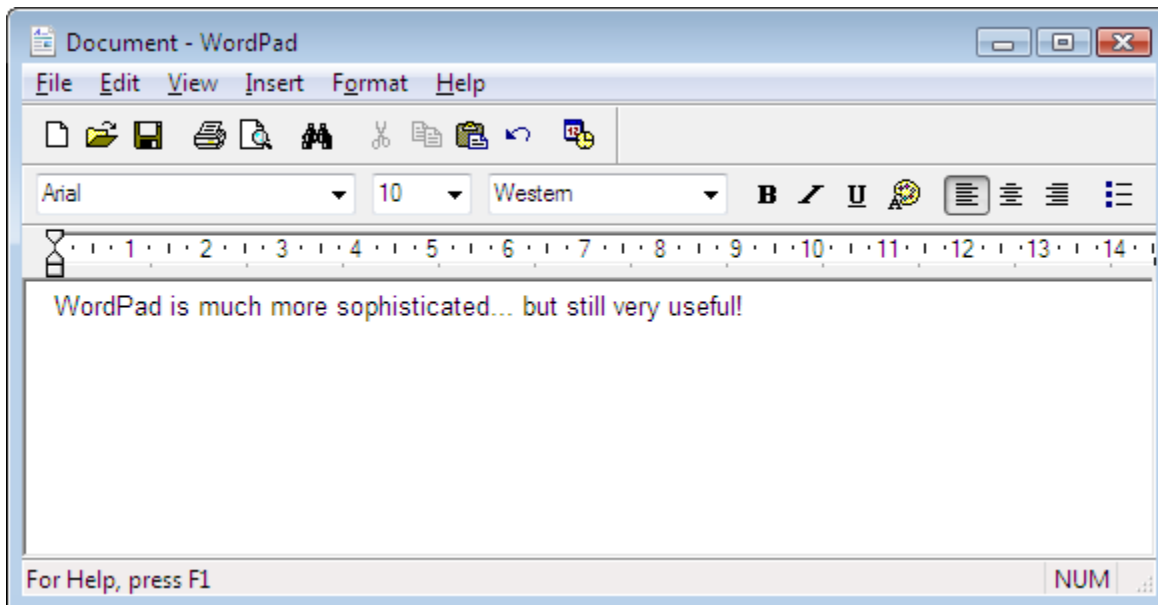
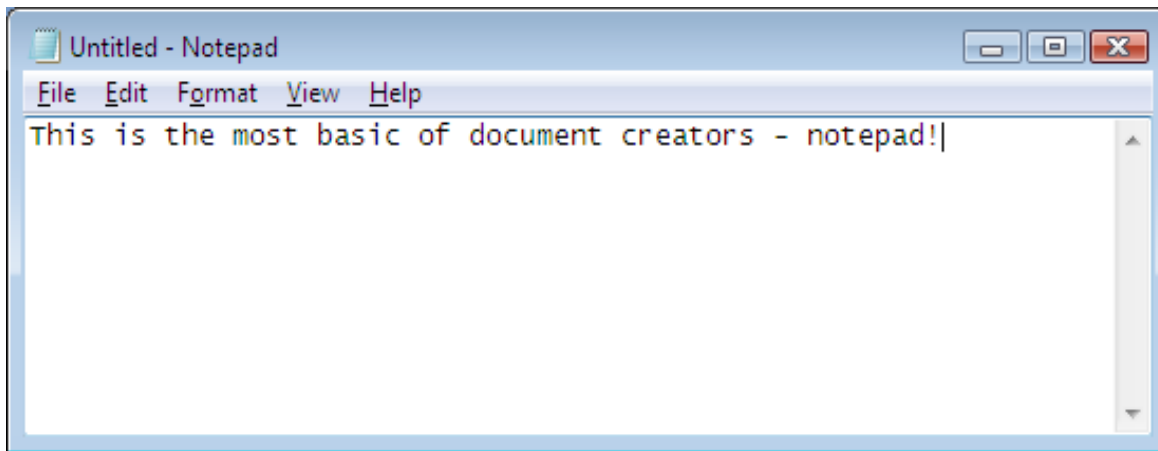
To email more than 400 people at a time please contact the webmaster@wildcaretas.org.au

A few tips and tricks

Preparing text for the web

There are lots of ways of styling your text when adding your text to the web. In general, we suggest that you don't format text in any way when you are preparing text ready to add to the Wildcare site. Keep it simple is a good policy. You will be able to do some styling once you add the text to the website.

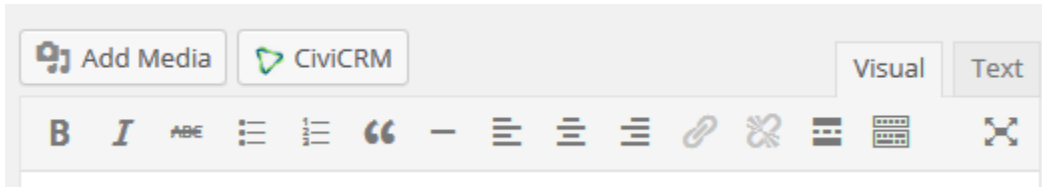
Most people have some application on their computer for writing documents. The most basic of these are programs such as notepad or wordpad. These can often be started from the Start, Run and typing in notepad (or wordpad)



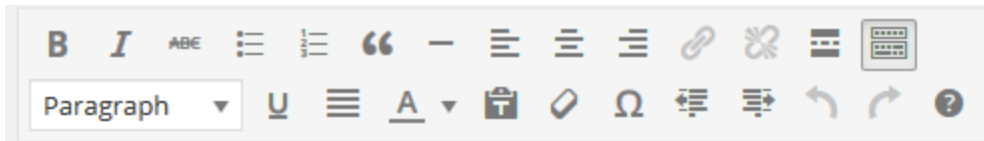
These allow you to write out text with almost no formatting. The resulting documents can also be read by just about any computer as they are just basic text documents.

The web styling interface

On many of the screens that you access as a President you can add extra styling to your text and this is done via a “toolbar” that makes the process slightly easier. In some case we have removed items if we don’t want you using them. This is to help keep a consistent look and feel to the website. The days of colorful scrolling and flashing text on websites are long gone!



If you only see the top row of icons then click on the “toolbar toggle” (under the word Visual) and a second row of icons will appear



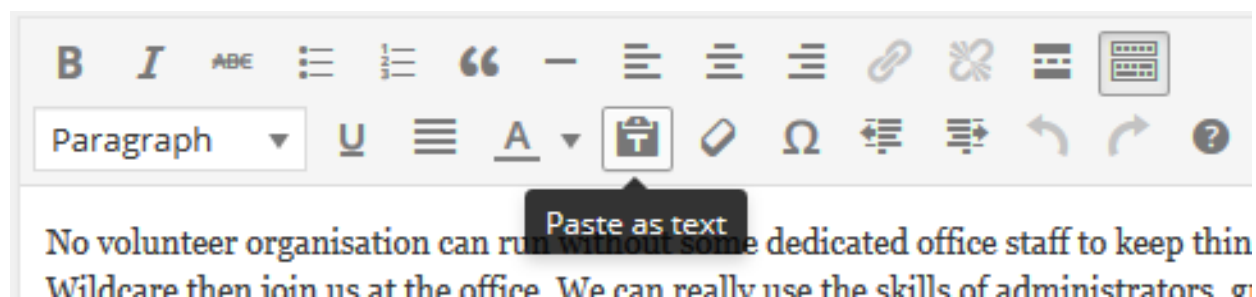
This is a very powerful tool but it can also make a mess of your text pretty quick smart. We have left on all the features in the toolbar as some folk will be very comfortable with doing extra styling. If you are a new user just take care when trying things out. Hovering over a tool will give you a hint as to what function it performs.

In the next few pages we will talk about some of the features.

Pasting from Microsoft Word

One of the biggest issues we have is people copying and pasting text from programs like Microsoft Word into the details area. Unfortunately this normally results in really strange text showing up on the screen when the event is saved. This is because behind the scenes Microsoft word has added heaps of “text” that many web browsers can’t read properly.

Whenever you paste information from Word you MUST paste as text. This will ensure that the text is correctly formatted for use on the web



Preparing images for the web

Occasionally you may wish to add an image to your branch's home page. In order for the pages to load quickly it's necessary to ensure that images are not too big.

When you add an image to the site, WordPress automatically makes several smaller copies of the image - A small thumbnail, a medium image and the original image. In general when writing an article or adding images to branch pages we will use the small thumbnails.

There are several free programs available that allow you to resize images – one of my suggestions would be Paint.Net at <http://www.getpaint.net/>

Adding a hyperlink

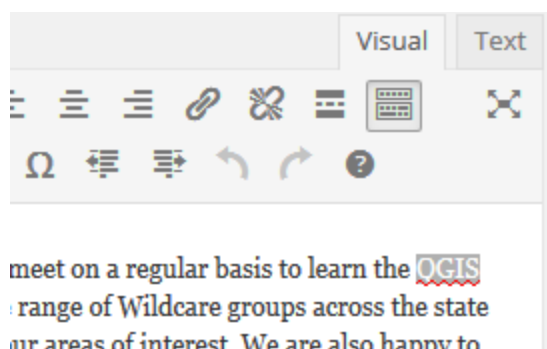
One of the most common web effects that people wish to use is to add a hyperlink to another page on the web. Maybe it's another website site that holds more information about your branch (maybe the Parks and Wildlife webpage for the park in question). This can easily be accomplished with a tool on the toolbar.

The first icon is for inserting or editing the link and the second is in case you are removing a link from some text.

They will be grey until you highlight some text that you want to show as a link. They will then change colour.



Simply select some text on your page that you want to be the “clickable link” – in the example below it's the word QGIS



We then click on the “Insert/Edit Link” icon and another screen pops up where we add the actual webpage details are inserted. Note that you can also use this process to link to some pages within the Wildcare website.

Insert/edit link ✕

Enter the destination URL

URL

Title

☐ Open link in a new window/tab

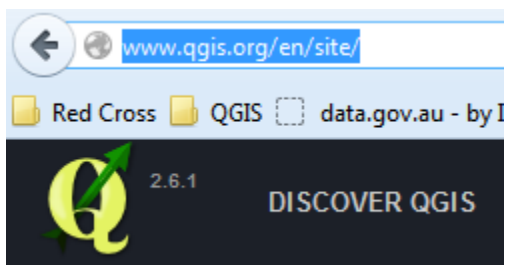
Or link to existing content ▲

Search

Search or use up and down arrow keys to select an item.	
A Couple of Tasks Knocked off the List	2015/01/20
Wildcare Annual General Meeting	2015/01/20
Get Outside has a wild and wet start to the year.	2015/01/15
Wildcare groups at Australian Wooden Boat Festival	2015/01/14
Bruny Island seeking caretakers	2015/01/14
Thark Ridge	2015/01/08

Cancel Add Link

It can be very useful to already have the web address of the page on your clipboard. Simply go to the web page and select the URL and then Ctrl C to place the details on your clipboard.



You can also make the resulting link open in a new page so that your members don't lose where they are in the Wildcare website. Press the OK button when you are happy with the details.

Insert/edit link

Enter the destination URL

URL

Title

☒ Open link in a new window/tab

Or link to existing content ▲

Search

No search term specified. Showing recent items.

A Couple of Tasks Knocked off the List	2015/01/20
Wildcare Annual General Meeting	2015/01/20
Get Outside has a wild and wet start to the year.	2015/01/15
Wildcare groups at Australian Wooden Boat Festival	2015/01/14
Bruny Island seeking caretakers	2015/01/14
Thark Ridge	2015/01/08

[Cancel](#) [Add Link](#)

When we return to the normal screen we can see the text is now blue and underlined. This indicates that it's an active web link.

