

INSTRUCTIONS FOR USING CAC WEBSITE MEMBER ONLY FEATURES

(Issue 2 – 14th February 2011)

INTRODUCTION

In addition to the website features available to the general public, member organisations may amend the contents of the website in respect of:

- Organisation Details – title, description, contact details, etc.
- Events – add and change details of hosted events

Each organisation has a username and password (issued by the website manager) to allow secure access to the *Control Panel* where changes may be made.

Important Note: The instructions below concentrate on the essential requirements for CAC members when using the *Control Panel*. There are other features displayed which are not described below – please ignore them!

ACCESS TO THE CONTROL PANEL (*hereinafter referred to as CP*)

On any of the pages in the *Members* or *Events* sections of the website, there is a *Login* button displayed immediately below the main banner heading of the page.

To enter the CP, press the *Login* button. This opens a new window (hiding the main site's window behind it) in which a valid username and password must be entered. On successful completion, the CP is then displayed.

After the first time that you log in, it is recommended that you change the initial password supplied by the website manager at the website launch (see My Account section of this guide).

If you cannot remember your password, press the *Forgot Your Password?* link on the screen. This opens a further new window, in which you should enter your member's "official" CAC email address (ending @canterburyartsscouncil.org.uk). An automatic email will then be sent to this address (and passed on to the designated forwarding address) giving instructions on how to reset the password.

NB Any problems in logging in should be reported directly to the website manager (webmanager@canterburyartsscouncil.org.uk).

USE OF CONTROL PANEL

On the initial CP screen, there are three main tabs at the top of the screen:

- Publish – for creating new member events
- Edit – for updating existing member events
- My Account – for managing the member's details (organisations only)

In addition, there are a few menu buttons on the top right of every CP screen which may be used (*see later in this guide*).

Publish Tab

Hint: Before publishing a new event, press the *Edit* tab (see below) to view the list of existing events to avoid creating the same event twice.

When clicking on this tab, a small box listing the word *Events* is displayed. Click on this and the form for creating events will then be displayed. Although the form has several tabbed sections, the *Show All* tab is initially selected by default, which displays the entire form. It is recommended that the other tabs are ignored.

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The *Publish Form* section allows the user to enter the basic content for the event.

- *Title* – this is the displayed heading for the event on all pages and should be brief.
- *Start/End Dates* – calendars are provided to allow the user to select the Start Date of the event and, for multi-day events only, the *End Date*. **Do not forget to complete the Start Date** otherwise the event will be assigned to the date you publish it. For single day events, the *End Date* may be left blank.
- *Start Time* – selected from a list, including *none* if not relevant or is too complicated to specify as a single time (in which case nothing is displayed online). NB The system does not allow the insertion of an *End Time* field. To deal with complex timing info, enter the appropriate times in the *Description* or *Venue*.
- *Multi-day event* – select either *Yes* or *No*. NB Only select *Yes* for events lasting two or more **consecutive days**. For a series on distinct dates, enter each instance as a separate (single day) event.
- *Categories* – this section is used to select the type of event by choosing from the displayed list. More than one category may be selected, if appropriate, by holding down the *Ctrl* key when selecting.
- *Options* – this section displays the *Author* and the *Status* of the event. These items are pre-filled with the member name and “*Open*” respectively and should normally be ignored.
- *Event Summary & Event Description* – the two sections in which to enter the details of the event. The *Summary* is a brief description of the event and should be **no more than 10-15 words**; it is displayed (with the title) on the level listing pages, but may be shortened if the recommended limit is exceeded. All extended information should be in the *Description*, which is displayed, with the summary and all other fields, on the individual event page. **Do not enter the same text in both parts.**
- *Venue Information* – this is where details of the venue must be entered.
- *Contact Information* – this is where contact details must be entered,
- *Upload File (for Advanced Users only)* – At the bottom of the form, there is an additional option displayed below the *Preview* and *Submit* buttons. When this option is selected, it is possible to upload a file from the user’s computer to the website, and display a link in either *Event Summary*, *Event Description*, *Venue Information* or *Contact Information* fields.
- *Formatting buttons* – Just above the *Event Summary* field, there is a row of special buttons to allow additional formatting in the text fields. To use any of them, first place your cursor in the relevant field at the position you wish to use the formatting. The meanings of the buttons are:
 - , <i> and <u> will format text as **bold**, *italics* and underlined respectively). In *Normal* mode, enter your text first, highlight it and then press the appropriate button. In *Guided* mode, place the cursor first, then press the button and follow the prompts. In both modes, additional codes will be added to your text to carry out the formatting.
 - <Link> and <Email> allow the users to create website clickable “links” on the page to bring up other web pages and send emails. In either button mode, pressing on the button will guide the user to enter the correct information. Additional codes will be added to the text entered to produce the necessary links.

Hint: It is recommended that you do not use the <Image> button as it may cause unexpected effects to the structure of the page. Contact the website manager for advice if this feature is urgently required.

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When all the details have been entered, press the *Submit* button to save and “publish” the event on the site. **NB.** To view the new event on the site, you may need to refresh the page in your browser. The *Preview* button displays some of the entered data at the top of the screen for checking purposes, but does not save any data.

Important Hint: Publishing Multiple Events

You may wish to create (publish) several similar events, where certain information (e.g. *Venue* and *Contact*) remain the same for every event. To achieve this more quickly, and avoid re-typing, create the first event as described above. Then, **without any intervening actions:**

1. Press the *Back* button on your browser (usually a left facing arrow on the top of your browser window). This will re-display the completed Publish form for the first event.
2. Change the fields that are different for the second event (e.g. *Title*, *Start Date*, etc.) and then press the *Submit* button when complete.
3. Repeat Steps 1 and 2 as required for subsequent similar events.

Edit Tab

Selection of this tab displays a summary list of all existing events (if any) owned by the member.

To delete any existing event(s), click the small checkbox at the end of the appropriate row(s), select *Delete Selected* from the dropdown box at the bottom right of the page and press the *Submit* button. Alternatively, to temporarily remove an event from being displayed, open the event for editing, and then change the *Status* field to *Closed* (it may be changed back to *Open* at a later time). **NB** All events are automatically removed from display on the site once their *End Date* has passed.

Clicking on the *Title* of any event, re-displays the *Publish* form described above to allow the information to be updated.

To save any changes, press the *Update* button. **NB.** To view the changes on the site, you may need to refresh the page in your browser.

My Account Tab

The only section that members need to access is found by selecting *Personal Settings* from the menu on the left. This displays a submenu, and only the following options on this menu are relevant at present:

The *Edit Profile* option displays information that is displayed in the members’ directory. Most of the displayed items may be updated to change the basic content of a member page:

- *Member Name* – if the organisation’s name has changed, amend the name here.
- *Member Category & Member Type* – These are key items that affect where the member’s details are displayed and cannot be amended by the member.
- *Website* – If one exists for the organisation, enter the web address, **omitting** the *http://* prefix.
- *Contact Name, Telephone and FAX* – **Only** complete these fields if it is acceptable to this person to have their information visible on the internet (Data Protection).
- *Description* – Another key item in which to enter details about the organisation for display on the member’s page.

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- *Forwarding Email Address* – All organisations have been given their own CAC email address on the website. In order for messages to be passed on, enter a valid email address and messages sent to the CAC address will be automatically forwarded to it. If you do not have an email address, a CAC mailbox can be provided by contacting the website manager.

Hint: The forwarding process is not automatically set up, so there may be a delay before forwarding is established (or changed if the address is amended). To assist, it would be helpful if an email could also be sent to the website manager to request forwarding.

The *Edit Photo* option allow the user to add, change or remove the logo (or other picture) that is displayed on the member page. Select the *Browse* button to find the appropriate file on your computer. Once selected, press the *Upload* button to transfer the file to the website. Alternatively, use the *Remove* button to delete an existing picture.

Important Note Pictures are displayed as **200 x 200 pixels**, automatically scaled if necessary to fit. Therefore, it is important to use a picture/logo file that is **square** to avoid distortion when shown on the site, i.e. use picture software to modify before uploading.

The *Username and Password* option allows you to change the login password. Please adopt normal password conventions to ensure that it is not easily guessed.

The *Edit Preferences* option may be ignored as these settings are not currently used on the site.

Menu Buttons

There are several items on a menu displayed at the top right of the CP screen which may be used.

Selecting *CAC Home Page* opens a new window displaying the site, which may be useful to check after changes have been made while remaining logged in to the CP.

Selecting *CP Home* returns to the initial CP Screen. **NB.** Any changes made and not saved are lost.

Selecting *Logout* closes the CP and re-displays the username/password window.

LEAVING THE CONTROL PANEL

When the member has completed all their amendments, the *Logout* option should be selected (see above). Alternatively, press the *Logout* button on any of the pages in the *Members* or *Events* sections of the website. In both cases, the CP login window should then be closed.