The Instructions and Procedures Documented Here Are For Use Only by SEL Board Members & Group Leaders

Advanced Security Access is Required to Use all of the Procedures Detailed Below

Contents

Adding and Removing Members from Activities of Interest Groups & Editing the Group Description

For additional information or assistance contact:
Herb Braidman, SEL Web Administrator
224-628-3291
hdonaldb750@gmail.com

This procedure is intended for use by Board members or Group Leaders. Administrative access is required in order to perform the procedure. If you do not have such access you should contact Larry.

1. Logon to the Administrative side of the website
2. Select and click the gray "Settings" tab
3. Find and press the "Group Management" button. (It is under the Membership Settings section).
4. A screen will display listing (in alpha order) all established SEL groups. By clicking on your group's name you can do the following:
    - Edit the description of the group (be sure to press Save after you make your changes. If you don't want to have the changes take effect press cancel). Please note the list published on the website is NOT dynamically updated. The update will be handled on a periodic basis.
    - Manage participants – adding or removing members
5. To Manage Participants press the gray titled key. You will see two columns of names – Current participants and All members
6. Highlight the members you want to add to the Group and click the "Admit selected" key
7. For members of the Group you want to remove highlight the name and press the "Dismiss selected" key.
8. This activity will also update the individual member's "Areas of Interest" in his membership record.

Special Note: You can add or dismiss multiple members at a time by holding down the "CTRL" key while highlighting the respective names. Do the adds and dismisses as two separate steps rather than combining the activity.

Benefit I If this list is kept up to date you can do all of your group mailings via the SEL website and not have to maintain a separate mailing list that may have incomplete, inaccurate or dated information.

Selecting Certain Members for Emailing

Procedural Steps

A. Emailing all or selected membership levels (using the member profile screen)

B. Custom selection of certain members with certain data in their membership profile – using the Advanced Search function.
   1. Matching Parameters – All – And; Any – Or
   2. Remove any existing criteria that may be present
   3. Select criteria by clicking on "Add Criteria" – a drop down window will appear
   4. Select the data element(s) you want to have for your selection of specific member records
   5. Select logical relationship (contains, is, is not etc.
   6. Enter variable determinant
   7. Repeat Steps 3 through 6 until you have entered all of your needed selection criteria,
   8. After you have completed your criteria selection, press the "Search" button. The computer will then display all of the records in the database that meet the criteria you entered for the Search.
   9. Review some of the records selected to verify the results of your selection criteria
   10. Once you reach this point you can save the "search criteria" for future use, Or proceed to the next step. If you are going to save it for future use select a special name you will remember so you can access it search criteria again.
   11. Once you feel comfortable that the right records were selected press the green "Email members" button. Only the member records selected will receive your email

C. Emailing Selected Members from the custom search
   1. After you press the "Email members" button you will get a display that allows you to do the following:
      - Create a new email
      - Use a previously saved draft – previously prepared but not yet used in an email
      - Copy a previously sent email – emails sent bu available for future use

   Make your selection and press "Next"

2. Previously saved draft – Select the one you want (it will be highlighted in gold) and press "Next"
    - Make changes if desired, and then press "Save and close"
    - Run "Test" email to verify
    - If all looks good next run "Preview and send"
    - Press "Send"
3. Previously sent email – used in an email at least once before Select the one you want (it will be highlighted in gold) and press "Next"
    - Make changes if desired, and then press "Save and close"
    - Run "Test" email to verify
    - If all looks good next run "Preview and send"
    - Press "Send"

D. Additional Topics
The following topics are for further enhancement or further customization of your email
    1. Changing font style
    2. Changing intensity
    3. Attaching a document to your email
    4. Using the Macro function

Selecting Specific Interest Groups for Emailing

Users of this function must have administrative or Board member access on the website

Logon

1. Logon to the Administrative side of the website
2. Select the Members page (in the gray border). The Members' Summary screen will be displayed.
3. Next press the "Advanced search" in the blue border

Setting Your Selection Criteria

1. About ¼ of the way down the screen you will see a box entitled "Match of the following criteria" The display box will have either "All" or "Any" in it. You want it to have "All" If it doesn't use the pull down tab in the box to change it to "All".
2. Under the "Match" box is a section entitled "Add Criteria". If there is any criteria present with a "Remove" tab remove all of the criteria present.
3. Click the "Add criteria" function and a pull down window will appear. This window displays all of data elements in the database which you can use to customize your selection criteria for purposes of sending email to selected members. Scroll down until you see "Activities of Interest" If you made an error click "Cancel" and start this step again.
4. The system will display to selection choices you made and the choices with each criterion.

5. In the middle section, you will see a window displaying “Any of the selected” It is the default choice. You do not need to change it.
6. Move to the list of activities and check the one or ones that you want to send an email.

7. Below the “Activities of interest” you will see “Member status” It will also be displaying “Is” with the “Active” button highlighted. This is the default selection. There is no need for you to change it for this selection.
8. Click “Search”. The computer will search and display all SEL members who have check the “Activities of interest you selected above.
9. Special Note – If you are going to use this selection criteria for future emails you may save the search parameters for such future use. Create a name for the search parameters that you will remember and click “Save”
10. You are now ready to send your email to those members you selected to receive it.

Sending Your Email

1. Click the green “Email members” tab. The system will display all members that meet your criteria and it will also display the number of emails that will be sent using the criteria you set up for the email.
2. The “Compose email” page will be displayed. You will have the choice of one of the following:
   - ✓ Create a new email – use if you do not have a previously saved or used text
   - ✓ Use a saved draft – you composed an email previously, but have never used or sent it
   - ✓ Copy previously sent email

   If you select options of previously saved or sent you will have the opportunity to edit and modify the content if you so desire.

3. After you make your selection click the green tab entitled “Next”
4. If you selected the saved draft or previously used option the computer will display your choices. Click on the one you want and it will be highlighted in “Orange”. Click “Next” and the selected content will loaded into this current email.

   If you plan to modify the selected draft you must first save it using the “Save and Close” option. Then bring the saved copy back to do your editing and changes and then use “Save and Close”

   Bring the saved edited version back by selecting and click “Use this draft”

5. Compose your new email or modify the one you selected that you previously used.
6. You will then have four choices to make as indicated by the green buttons
   - ✓ Preview and send – this will let you preview the email before it is sent. Once you do this you will be able to send it or cancel sending
   - ✓ Test email – This is another form of previewing the email. The computer will send the email only to your Inbox for review
   - ✓ Save and close – You want to save this email for future us, but not send it now
   - ✓ Cancel – You want to cancel all you have done and/or run away.

7. The computer will then give you the option to delete the draft if that is what you want to do.

Sending File Attachments Using the SEL Website

You must have either a Group Leader or Board member Membership Level to use this procedure. To include file attachments with your email you will need to upload the file(s) you want to attach to your email that you saved on your computer. You will also need to know the name of the folder on your computer in which you previously saved the file(s).

Email Preparation

Perform the following tasks which are the same as you would do when you are preparing an email without attachments. These include the following:

1. Do any selection of those to whom you intend to send the email.
2. Select one of the three choices available to you on the "Compose email screen" These are "Compose new email", "Use a saved draft" or "Copy previously sent email"
3. When the template for composing the Subject and Text is displayed compose your new email or edit, if necessary, the email that already is on the system.
4. After you have finished your message content press Enter to position your cursor at least one line below the last line of the message text. This is important because that is where the file attachment link to the file will be placed.

Uploading Files from Your Computer

1. After you have completed the Email Preparation steps click the green "Document" button. A window entitled "Insert document" will open.
2. Go to the "Upload" line and click "Browse"
3. A window to your computer will open. Select the folder in which you saved the file you want to attach to your email. The default display will be the folders on your Desktop of your computer. Usually, there will be a two column display. The leftmost column will contain the names of the folders on your computer. Find the folder in which the file(s) are stored.
4. Click Open.
5. Select the file to be uploaded by highlighting it and then press the "Open" button.
6. The computer will then upload the file you selected and it will be displayed in the "Insert document" window.
7. Repeat these steps to upload multiple files. You should do one file at a time.
8. Once you have completed uploading all of the files you need for attaching to the email proceed to the "Attaching Files" step

Attaching Files to Your Email – Attach File(s) Step

1. Find the green button labeled "Document". Press the button. A window entitled "Insert document" will appear. If you have previously uploaded the file it will appear in this window. Click on the file name and the file name will appear in the "Link text" line.

Additionally, the “Insert document” button will appear at the bottom of the screen. Click the “Insert document” and the file name will appear in the text section of the email at the position where you left the cursor; hopefully at least one line below the last line of the text in the email.

2. If you need to send an email with multiple attachments repeat step 1 until all are attached. However, before you add the next attached file position your cursor at least one line below the last attachment you put in the text portion of the email.

Sending the Email

Proceed with review, further editing if necessary and sending steps as you would do for emails without attachments.

Questions contact:

Herb Braidman, SEL Web Administrator
224-628-3291
hdonaldb750@gmail.com