INITIAL CLUB CREATION

Once your club website has been created and access granted, go to your website to fill out group information and membership plans. If you are a domestic chartered group and wish to be able to collect online event registration and/or membership fees through the SAA site, please contact your regional manager for an ACH form.

WEBSITE SETUP

The updated event module has gone live!

The event module now allows you to take online reg if you have a bank account, and also post your event directly onto the SAA event listings and link it to your club webpage. Don’t have a bank account? You can still set up online RSVPs, or link out to another payment system.

You can now access your event module through your club website. Also, for the time-being use Internet Explorer if possible, as we work through a few bugs.

The last webinar to get up-to-speed and learn all the ins and outs of the system is:

3/29, 3:30 - 4:30 p.m. PST

To join:
1. Click the link for the appropriate webinar
2. If requested, enter your name and email address.
3. If a password is required, enter the meeting password: stanford.
4. Click “Join” and follow the instructions on the screen.

We will start promptly on time, so please try to join a few minutes early if you can.
Creating/Updating Your Official Club Website
*Note: for instructional purposes, a variety of different club screenshots will be displayed*

If a member of your group
Log into the SAA website using your username and password. Once logged in, enter the Groups section of the site, then click the "My Groups" link on the left hand menu. Your new official club will be listed here, along with any online communities you are a member of. To enter your club information and preferences, select "Manage Group" beside your new club. You will be taken to the "administrative dashboard."

If not a member of your group
Follow the link to your website from your regional manager or search for the group name. Log into the SAA website and click "Manage Group" on the right under group links to navigate to the "administrative dashboard."

Admin Dashboard: Group Settings
Click the green "Manage group settings" button.
This page allows you to set up the basic information for your club and is the jumping-off point for setting up club membership plans as well. Starred fields are required.

**Initial Fields**

**Group Name:** the group name is set by the name you indicated on the Club Charter form. To change an official group name, contact your SAA contact.

**Group URL:** this creates the short URL for your club, in the format "pgnet.stanford.edu/goto/name." Once created, this name cannot be changed by the club, so please choose your shortcut name carefully.

**Group Email Address:** The main email for the club. Messages sent by the club can come from this email address. We highly recommend establishing a permanent @alumni.stanford.edu email address for your club. This will allow you to have a consistent e-mail address for your members despite any leadership changes. If you would like to establish an @alumni.stanford.edu e-mail address, please contact your regional manager.

**Group Description:** The required group description should be short, engaging, and get your point across as to what your vision for the group is. This is displayed not only on your home page, but also as the blurb describing your group in the general Group page. Think of this as the "introduction" to your club for most alumni.

**Spotlight**

The spotlight section allows you to create a section at the top of your page that serves to highlight your most important priority, whether it is an upcoming event, news, or elections. The spotlight can be turned off, changed, or updated at any time. We highly recommend utilizing this feature.
To create, check the "add spotlight" box, create a title for your spotlight and fill in the text for your message.

Group Settings

Group settings help us to categorize your club and make it easier for interested parties to find it.

**Group Join Type:** Based on the join type you requested during initial set-up, this has already been set to “Public,” “Private,” or “Semi-private,” and cannot be changed. Reach out to your regional manager if you need to change this setting.

**Group Categories:** Select all applicable categories from the drop-down menu. Alumni will be able to filter their group search by category on the general Group page. Based on your club affiliation, you can have multiple selections. For example, if your club was a diversity group and a young alumni group, you could select both "young alumni" and a diversity affiliation.

**Show Group Members:** In private and semi-private group scenarios, this option makes the club group members visible to alumni visiting the club page, whether they are members of the group or not. Essentially, this toggle makes the group membership public to view. It will default as checked (i.e. viewable).

Important Notes:

- Member names are not visible to non-alumni who are not club members, even if they are signed into the
SAA web site. If a non-alum is a club member, they will see slightly edited information.

- Individual members have the ability to make their information viewable or not, separate from the group designation.

**Region:** This setting will determine whether your club is searchable by region in addition to the categories you selected above.

- **Regional:** A group is regional if it is tied to a mappable location (i.e. Chicago, Northern California, Europe).
- **Global:** A group is global if the interest is not tied to a particular region. "Stanford Alumni in Education" would be one example of this.

**Group Location**

A mailing address is required for all clubs. The club mapping capability, however, will only function for regional clubs.

**Zip/Postal Code (for regional clubs only):** select a zip code to "map" your group to. This can be the location where most events may be held, or simply a centrally-located zip associated with your city.

*How do zip codes work and why do they matter?* The SAA website now allows alumni and visitors to search for local groups by city or zip code. Visitors will enter their own zip code and indicate the radius they would like to search within that zip code. For example, a person could search for any club within 25 miles of zip code 94305. If the group falls within that radius, it will be included in their search results.

**Mailing Address - required:** This will be stored in our records as your club's official mailing address, where correspondence may be sent. This does not have to coincide in any way with the mappable address. Some clubs use a volunteer's address to receive mail, others have set up a P.O. Box for club mail – such as mailed-in membership checks or registrations.

**Saving**

Once you are done with the steps above, you can "Make Live" your group, which will make it become active on the SAA site, or you can "save as pending" if you’d like to review later before sharing your official group with the world. Be sure to check the content certification box.

Your group will not be visible on the SAA page until you select "Make Live." If you keep it as pending you can find the club again by using your prior path.

**Group Modules**
Optional group functionalities can be set here and are discussed in the Optional Modules page on the Club Leader Resource page. The status can be set from Disabled (they will not show up on your group page) to Enabled by pressing the "edit" link. Each module will be described in more detail in the document, "Optional Module Setup."

When disabling and enabling modules, you will be taken to a different page, so please make sure to save your work first!(s)

**ADDITIONAL PAGES**

**Admin Panel: Group Pages**

Up to five additional “blank” pages are available for you to customize on your website. Examples of how some groups utilize these pages include: listing board members, linking to other sites, and listing past events. You can decide how your group may put these pages to use (or not) best.

The Group Pages tab is situated right beside the Group Settings tab.
**Page Name:** Name your page

**Status:** Set the status to "enable"

**Page Content:** The WYSIWYG (glossary) editor allows you to enter the content on your page without needing to know HTML.

When finished, you may save and preview your page.

**Edit group pages:** As you add more pages, they will be listed on the top section under the Group Pages heading, and you may edit them by clicking the "edit" button beside each one.
Now that you've created your official club and completed your webpage, it's important to make it easy for alumni to find your group! Groups are searchable from several sections of the website:

From Where I Live, alumni can search for groups, events or alumni in a radius from a selected location. Your group zip code, which you entered in the group settings page, is very important as it is what determines where your club will pop up if an alum does this search:

Alternately, alumni can search for clubs using keywords in the Groups and Club page. The Search Groups function pulls from the group name and group description. However, to make your club even easier to find, you can tag your club with different keywords that alumni may be searching for.

In the search below, we have searched for Great Britain. Since the name of the club is the Stanford Club of Great Britain, the club has appeared. But notice the description does not mention England, London, UK, U.K., or any of the other common search terms that may be used. If we were to search using just London, the club would not appear.
But if we tag the club with these keywords, then alumni who use these terms will get the Stanford Club of Great Britain in their results. Tags can be found and entered in the right-hand corner of your club home page.
Use a variety of keywords when tagging your group. For example, where there are multiple clubs in a state, clubs can tag themselves with the state name. The Stanford Club of Houston may want to use the tag "TEXAS" in case someone is searching for all groups in Texas from the search field, instead of going to the Where I Live page.

Tagging markedly improves users' chances of finding your club.

If you wish to remove a tag, click on the "my tags" link, select the tag from the list you will be presented, and then press delete in the page that follows.
Specific Action

When you have located the group member you need, you have several action options.

- **Make Contact:** makes this member the Contact Person for your group and only shows up as an option for officers. Their contact information will show on the home page of your website. Most clubs assign this to the president, the membership chair, or the secretary.
- **Remove:** removes a person as a current member and makes them a cancelled member.
- **Blocked:** blocks the person from interacting with the club in any way and from receiving group communications.
- **Send message:** opens a message window to only message this person, as opposed to the entire group membership.
- **Role:** assigns a volunteer role to the member.

Roles

The club president and webmaster can assign roles to other group leaders and give them access to the web tools. The role of President can still only be coded by SAA staff, so please contact your regional manager if the leadership of your official group changes.
Qualifications:

- **Only current club members can be assigned roles.** This is a change from the previous model, where board members did not have to be signed up as current club members.
- One person can be assigned to several roles, depending on the access they need to the site.
- Multiple people may have the same role.

### Role Access Breakdown (what each role gives access to):

<table>
<thead>
<tr>
<th>Role</th>
<th>Officer coding</th>
<th>Membership Management</th>
<th>Discussion Board Admin.</th>
<th>Content Pages</th>
<th>Event Setup</th>
<th>Smartmail Lite</th>
<th>Polls</th>
<th>Blogs</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Webmaster</td>
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<td>Secretary</td>
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<tr>
<td>Treasurer</td>
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<td>Membership Chair</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Event Planner</td>
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<tr>
<td>Officer</td>
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<tr>
<td>Blogger</td>
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<td>X</td>
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</tbody>
</table>

**Emailing the Membership Using SmartMail Lite**

Members can be emailed right from the Membership page by clicking the "Email These Members" button at the bottom of each Membership listing. In this way, you can quickly email Current, Past, or Lapsed members without having to run a report.

You can also access the entire membership, or different subsections of your group, through the reporting functions accessed via the dashboard.

To learn how to message your membership using SmartMail Lite, please refer to the SmartMail Lite document, "Sending Emails through SmartMail Lite."
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My Tag Detail: International

Tags are used throughout the site in order for you, the user, to add keywords to items. The following is a "tag" showing all items tagged with this particular word. You may delete tags that you have created.

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Item Type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stanford German Association</td>
<td>Official Club</td>
<td>Delete</td>
</tr>
<tr>
<td>Stanford Club of France</td>
<td>Official Club</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Showing 1-2 of 2