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Accessing the Admin Panel

Step 1

Welcome Back!

UserID
AdminUsername

Password
●●●●●●●●●●

[Forgot your password?](#)

Remember Me **LOGIN**

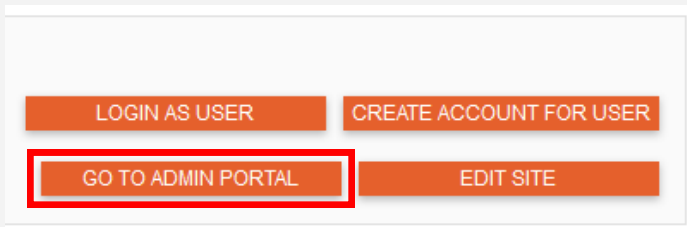
Or

Login with Facebook

A Site Administrator will create your account and provide you with a username and password. Please keep in mind that this account is completely separate from your regular site account, and cannot be used to engage in features such as searching for commute partners and logging trips.

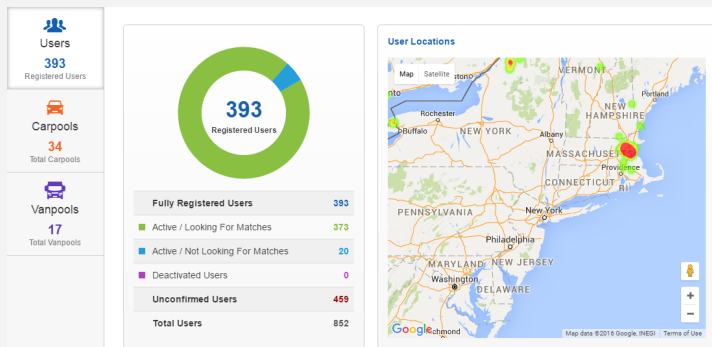
Log in to your administrator account through the regular log in button.

Step 2



Access the Admin Portal by clicking on the “Go To Admin Portal” button near the top of the window.

Step 3



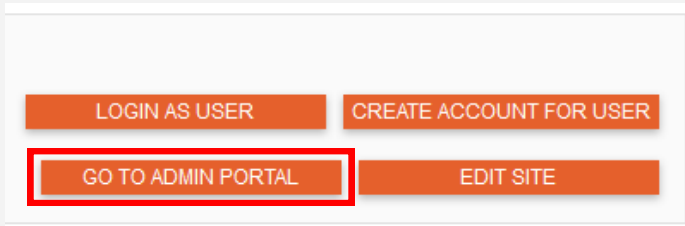
You should now see the admin dashboard for your assigned subsite. From here, you can use the navigation menu at the top to access different functions of the site.

You will only be able to access functions that the administrator has given your permissions for.

Any changes you make will only affect your assigned subsite.

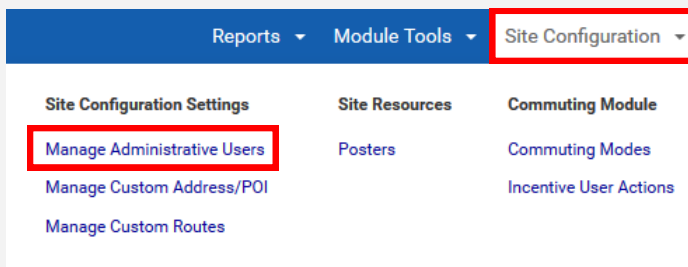
Edit Your Account Information

Step 1



Log in to your administrator account and enter the Admin Portal.

Step 2



In the Admin Portal navigation menu, click on:
 “Site Configuration”
 “Manage Administrative Users”

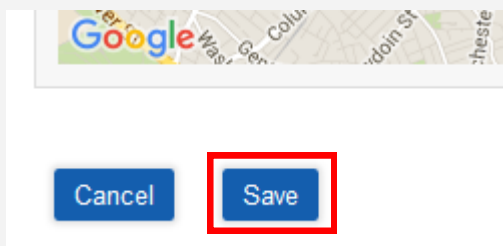
Step 3

		Admin User ID Num	User ID
<input type="checkbox"/>	Edit	2266	CSS1Test
<input type="checkbox"/>		2265	TMA1Test

On the “Manage Administrative Users” page, you will see a table containing all of the administrators of your subsite.

Click “Edit” next to your User ID to change information such as your email and password.

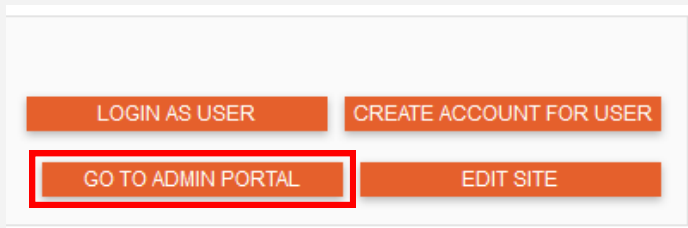
Step 4



Save your changes at the bottom of the page once you are done editing your information.

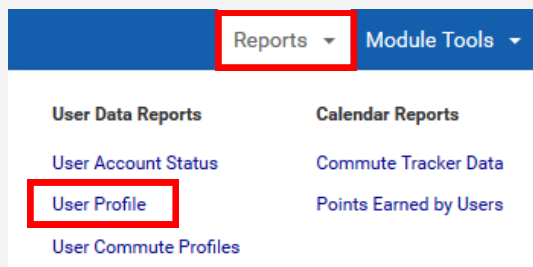
View Users in Your Subsite

Step 1



Log in to your administrator account and enter the Admin Portal.

Step 2



In the Admin Portal navigation menu, click on: “Reports”, then “User Profile”.

You can see different details about a user by looking at the other links under “User Data Reports”.

Step 3

Search for
Enter multiple search parameters
one per line
or
separate by Semi-Colon (;)

Export To Excel

Use the fields at the top of the page to filter through the users.

You can download an .xls file of the search results by clicking on the “Export to Excel” button above the table.

Step 4

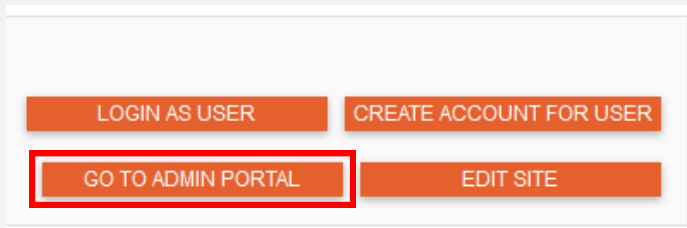
		User ID Num	User ID
<input type="checkbox"/>	View	710076	

Below the filters, you will see a table containing all of the users who belong to your subsite.

Click on “View” next to any user to see their account information.

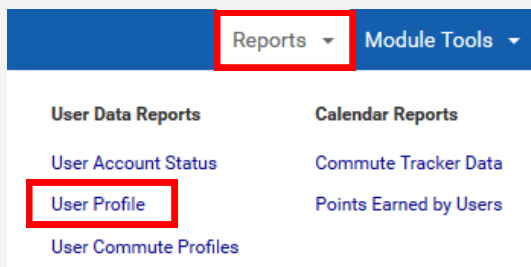
Send Newsletters to Users in Your Subsite

Step 1



Log in to your administrator account and enter the Admin Portal.

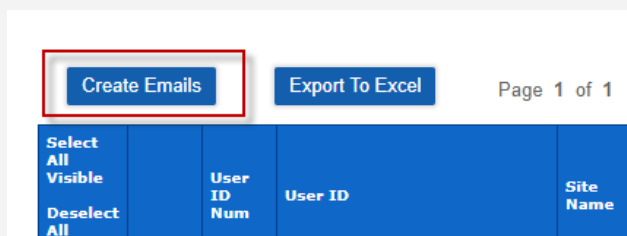
Step 2



In the Admin Portal navigation menu, click on “Reports”, then choose the report you’d like to use (usually “User Profiles”).

You can also find a direct link to the email tool under “Site Configuration”, then “Email Tool”.

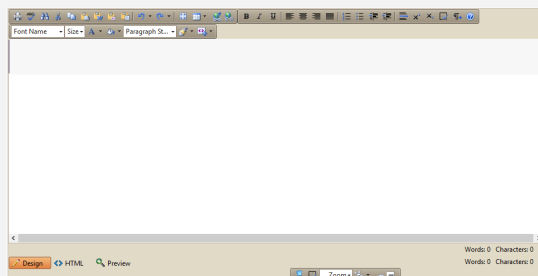
Step 3



Use the filters at the top of the page to remove users you don’t want to email. Specifically ensure that the “Communications Permitted” field is set to “True”.

Click the “Create Emails” button to select all users who match your filter parameters.

Step 4



You should be directed to a page with the email editor on it, which will look something like the image to the left. A list of users that will receive the email should appear on the right.

The next few pages will explain the different editing functions in more detail.

What Can You Do With the Email Tool?

Email Templates

Save Email Template As...

Save email template as

This template is visible for all administrators

Templates allow you to create an email, save it, leave the page, and import it back again. This is useful if your email newsletters always have the same layout; you can simply open the template and add your new text.

To be saved as a template, an email must contain a body and a subject.

Adding Email Information

From:
 Reply To:
 CC:
 BCC:
 Subject:

Fill in the Email Header Fields:

- 1) "From" will be automatically filled in with your site's admin email.
- 2) Remember to change "Reply To" to your admin email or somewhere that you want to receive replies at.
- 3) You won't be able to send an email without adding a Subject.

Selecting Users to Email

NOTE: It is extremely important that, when selecting users to email, you change the "Communications" filter to only show users set to "True".

Communications Permitted

[Select all]

False

True

To Options:

- 1) **Email all users that match criteria above**
- 2) **Select individual users in results table below**
- 3) **Paste list of users below**
 Separate multiple emails by commas (,) or by semi-colons (;) or enter one per line

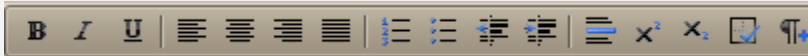
To select users to send your email to, you have 3 options:

- 1) Filter the users using the fields at the top of the page, then select "Email all users that match criteria above".
- 2) Use the table to check off specific users to email.
- 3) If you have a spreadsheet of users, you can select their email addresses and paste them in the provided text box.

Editing Tools



- | | | | | |
|---------------|----------|-----------------------|----------------|------------------|
| 1. Print | 4. Cut | 7. Paste from Word | 10. Undo | 13. Insert Table |
| 2. Spellcheck | 5. Copy | 8. Paste as HTML | 11. Redo | 14. Link |
| 3. Find | 6. Paste | 9. Paste as Plaintext | 12. Select All | 15. Remove Link |

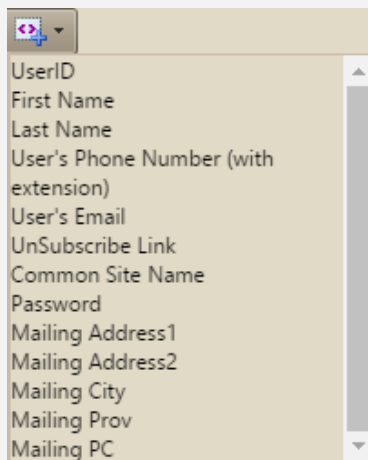


- | | | |
|---------------------------------------|------------------------------|--------------------------|
| 1. Bold, Italic, Underline | 4. Less Indent, More Indent | 7. Show/Hide All Borders |
| 2. Left, Center, Right, Justify Align | 5. Horizontal Rule | 8. Begin New Paragraph |
| 3. Numeric, Unordered Lists | 6. SuperScript and Subscript | |



- | | | |
|----------------------|---|------------------------|
| 1. Change Font | 4. Change Background Color | 6. Auto Format |
| 2. Change Font Size | 5. Change Text Type (Paragraph, Header) | 7. Insert Code Snippet |
| 3. Change Text Color | | |

Adding Code Snippets



Code Snippets are very useful for personalizing emails and automatically adding information.

1. "UserID" will add the receiving user's username, usually their email address.
2. First and Last Name will add the receiving user's First and Last name that they entered into the system.
3. "User's Phone Number" will add the receiving user's phone number.
4. "User's Email" will add the receiving user's email address.
5. "Unsubscribe Link" will add a link that, when clicked, will set that user's communication permission to "False".
6. "Common Site Name" will add your site's name.
7. "Password" will add the user's password
8. The "Mailing Address" codes will add pieces of the user's home address.

View Message



Switch between views. The editing tools can only be used in the "Design" View, and you can only see and write HTML in the "HTML" View.

Send Test Email

Send Actual Emails

Send a Test email to yourself. In a test email, all code snippets (FirstName, LastName, etc.) will be replaced with placeholder information.

Edit Content on Your Subsite

Step 1

LOGIN AS USER

CREATE ACCOUNT FOR USER

GO TO ADMIN PORTAL

EDIT SITE

Log in to your administrator account and click on “Edit Site”.

Step 2

Content Name: HomePageTextInsert

EDIT

WELCOME TO

The website content will now be surrounded by light blue boxes. Hover over a box to display a black bar at the top.

Step 3

Content Name: HomePageTextInsert

EDIT

Content Name: HomePageTextInsert_TMAtop

You must be on the **Default** site to edit this section.

Each content area has a permission level assigned to it. As a subsite administrator, you can only edit some of these areas.

Anything added in a parent site-level block will not be editable from your subsite.

Step 4

HomePageTextInsert

Type: Text Block | Category: Home Page

 Show Archived Versions?

Type	Created on	Last edited on	Last edited by	Description
Production	Feb 9, 2016 8:35 AM	Feb 9, 2016 8:35 AM		Changed button link urls

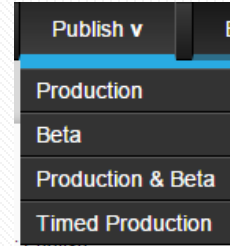
Open

Clicking the “Edit” button will open a pop up with information about the last changes to that block. You can see past versions by checking “Show Archived Versions”.

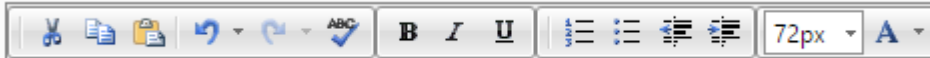
Action Bar



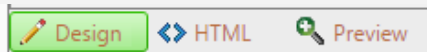
1. **Preview:** Shows the content you're editing in the website frame. Use the "Back to Editing" button to return. Clicking "Exit" will discard your changes.
2. **Versions:** Display past version of the file and allows you to open them.
3. **Save As Draft:** Saves your changes in draft format. To re-open the file, check "Show Draft Versions".
4. **Publish:** Displays a drop-down with several options:
 - a. **Production:** Publishes the page in production mode only. Your changes won't show up on the beta site.
 - b. **Beta:** Your changes will only be shown on the beta site. Good for testing.
 - c. **Production & Beta:** Publishes your changes to both versions of the site.
 - d. **Timed Production:** Allows you to choose dates for your changes to



Editing Tools



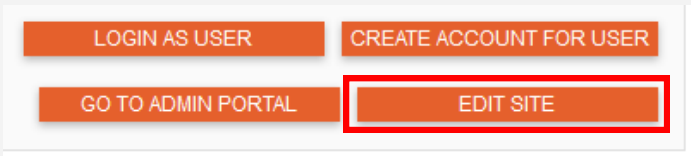
- | | | | | |
|----------|---------------|--------------|--------------------|-----------------------|
| 1. Cut | 4. Undo | 7. Bold | 10. Numbered List | 13. More Indent |
| 2. Copy | 5. Redo | 8. Italic | 11. Unordered List | 14. Change Font Size |
| 3. Paste | 6. Spellcheck | 9. Underline | 12. Less Indent | 15. Change Font Color |



Switch between views. The editing tools can only be used in the "Design" View, and you can only see and write HTML in the "HTML" View.

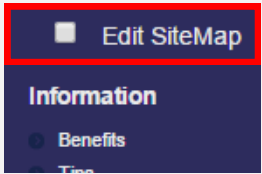
Edit The Footer of Your Subsite

Step 1



Log in to your administrator account and click on "Edit Site".

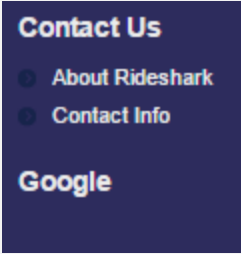
Step 2



Scroll to the bottom of the home page, and check "Edit Sitemap" in the footer.

Footer Item Types

There are 4 different types of footer items you can create:





1. Group Heading with Sub-Links: Displays as bold text, and can have Sub-Links assigned to it. Cannot be linked to a URL. Example: "Information".
2. Group Member: Creates a Sub-Link that you must assign to a Group Heading item. These can be linked to a URL. Example: "Benefits" and "Tips".
3. Heading With Hyperlink: Visually similar to a Group Heading, but allows you to apply a URL, and does not allow Sub-Links. Example: "Google".
4. Image With or Without Hyperlink: Add an image by URL, and optionally link it to a webpage.



The different settings for each item type will be described in the next section.

Add a New Footer Item

Step 1

 [Create New Header or Image](#)
 [Additional Resources](#)

When editing the footer, click on any green + icon to begin adding a new item.

Step 2

Item Type

Select the type of item you would like to add.

Step 3: Fill out the required fields

Fields for Heading-level items

Enter the text you would like to be displayed. If you are adding an image, this will display when you hover over the image.

If you are adding a linked item, add the webpage URL.

If you are adding an image, add the image URL (ending with .jpeg/.jpg, .png, or .gif)

The Group Header Sort Order determines where your new item is placed. It counts the number of **heading-level items** already in the footer. Always ask your site administrator to check the numbers assigned to the other footer items. For example, the first item in the list may be set to number 4, so if you want your item underneath it, you'll have to set yours to number 5, not number 2.

Sort Order Within Group appears when you are adding a new Group Member.

Item Status

- Show In Beta Only
- Active
- DeActivated

To show your new item to all users, set the Item Status to "Active". To test your item in Beta mode, set it to "Show In Beta Only". "DeActivated" will remove your item.

Step 3: Required Fields Continued

Display In

If this item links to a webpage, choose how the link should open.

Affects Which Custom Sub-Sites

Select how many subsites this item should be visible on.

Custom Sub-Site Affected

Custom Sub-Sites Affected

(sep by ";")

The last field will allow you to specify which subsite you would like the item to be visible on. The drop-down field will allow you to select a single subsite. If your subsite has subgroups, the item will be visible to them as well. If you are the administrator for multiple subsites and know their database names (without spaces), you can list them in the text box to make the item visible to all of them.

Step 4: Editing Footer Items

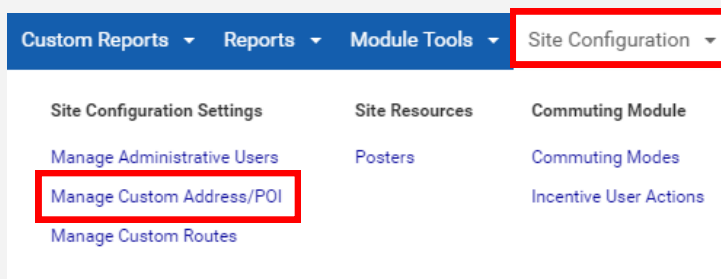
Unfortunately, only Site Admins and higher can edit Footer Items after they have been added. As a Sub-site admin, you can delete the item you need to change and recreate it with the updated information, or you can contact a Site Admin to request assistance.

Adding a Custom Address or Point of Interest

About Addresses and Points of Interest

1. An Address is a custom named location that you can add to the system. It appears in the suggested addresses in the search fields when a user is looking for commute options.
2. A Point of Interest is another custom named location, however they can only be seen when a user selects “Show POIs” on the right-hand side of the commuter options map.

Step 1



Log in to your administrator account and enter the Admin Portal. In the Admin Portal navigation menu, click on:

“Site Configuration”, then “Manage Custom Addresses/POI”.

Step 2

On the Custom Addresses page, click on “Create New Address”.

On the following page, select the type of address you would like to add.

Save this location as

 Address Only

 Address and Point of Interest

 Point of Interest Only

Step 3

Location Name

Enter the name of this location

Only Display The Name In Dropdowns (Do not display address, city, etc)

Add a name for the location. Make sure it’s recognizable, such as “Main St. Train Station”.

If it’s a unique location, you can optionally check the “Only Display Name” checkbox. If, for example, there are multiple train stations on Main St., then you would want to leave it unchecked.

Step 4

Specify location by:

Physical Address

Click on Map

There are two ways to enter an address:

“Physical Address” allows you to type the address into a text box, and tries to auto-complete it, similar to Google Maps.

“Click on Map” allows you to add the address piece by piece, similar to filling out a shipping address on a site such as Amazon. You can use this option if the auto-complete has trouble finding the correct city or zip code.

Physical Address

Enter an Address or Location

Enter an Address or Location

Nearest Intersection

Address Status

-- Please Select -- ▼

Only the “Specify an Address” field will attempt to auto-complete. The “Nearest Intersection” field is only for internal record.

For this address to be visible to your users, the “Address Status” must be set to “Active”.

Click On Map Address

Click a point on the map to set the location before entering address information.

Address

City

State

Country

ZIP Code

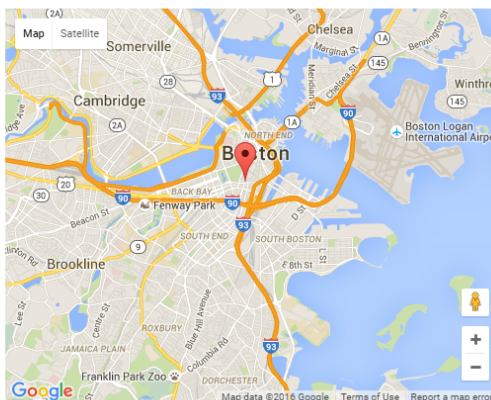
Nearest Intersection

Address Status

-- Please Select -- ▼

Zoom To Address:

Go



Your location is at latitude: 42.3527, longitude: -71.0623

An address can be entered into the “Zoom” box to search.

This method of adding locations is useful for adding places without a street address, such as an attraction in a park.

Step 5

Always double check the restrictions for the address.

“Address Visibility Restrictions” restricts which subsites the address will be visible on.

“Administrator Restrictions” restricts who can edit it. Only the admins on the approved subsites and subgroups will have the option to modify the address details.

Step 6: Point Of Interest Only

If you’re adding a Point of Interest, you will see the “Point of Interest Info” box at the bottom on the form.

If you are adding an Address *and* a POI, then you will see the “Status” option both under the address above and in this section. You can set them independently, for example, set it to be active as an address but only visible as a POI in Beta.

The “Marker Name” will be the visible title of the POI when a user hover over it.

The “Type” allows you to classify this POI, and displays the appropriate icon when viewed on the map.

The “Description” field can be used to add a short description to a POI. It is also useful for adding links to more sources of information about the location.