CiviCRM Training

ARCS Foundation

West Monroe Partners
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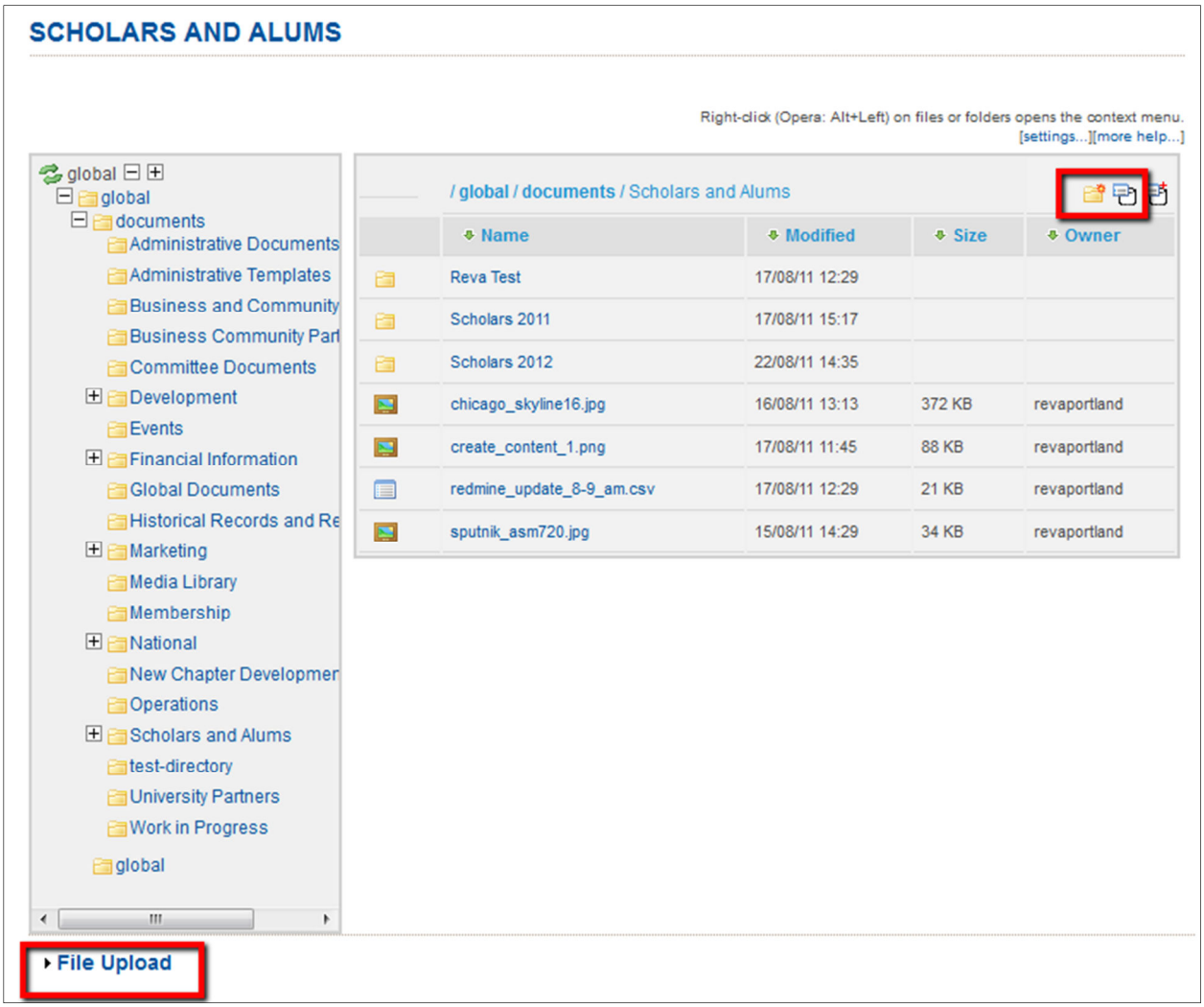
Document Library

The document library is similar to looking into a file folder on a common PC. The links under the document library on the main navigation take you to different file folders. You may also navigate anywhere within the document library by simply using the **expand** or **compress** folders on left-hand side of the document library page. Clicking on one of the folders in the left navigation will open the contents on the main part of the page. To upload a file, click the **File Upload** link at the bottom left. The three buttons on the top right of the page are **New Folder**, **Add files in this folder to the database**, and **Recursive add files in this folder to the database** respectively. A confirmation popup will appear if you click one of the buttons to add files to the database.

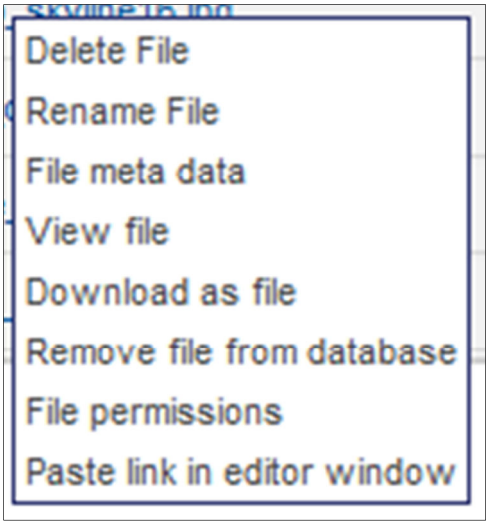


When you upload a document to the document library, it does not get added real time to the database. It can either get added every hour by a batch job that runs in the background OR you can click on the

button to “Add files in this folder to the database”. Clicking the button will add the document immediately and have it viewable by others.

You can use the button called “Create new folder” to add subfolders to the document library. You may not add any options to the Document Library (these have been defined and may only be changed as per a decision from the Information Strategies Committee). Please follow the naming conventions outlined in the Website and Database Governance document.

If you right click on a document, you will have the following options:

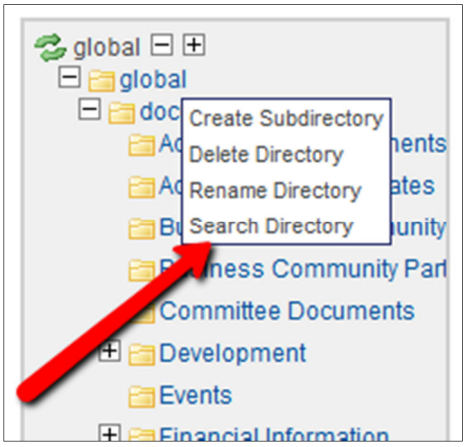


Here are some important things to note about a few of the following options:

- File meta data – You can use this option to add keywords in the *Description* box once you open up the meta data. These keywords will be searchable for the end user.
- Remove file from database – Deleting a file will remove it from the user interface view. If you want to remove a document entirely, you can use this option
- File Permissions – Permissions have been set at the Document Library level, there is no need to set file level permissions.
- Paste link in editor window – This option has been disabled

When searching for a document, you can either:

1. Search in the global search box at the top right hand corner of the webpage and then click on Documents. This will search h file names and keywords.
2. Right click on the directory on the left hand side of the document library and select “search directory”. This will search file names only. Be careful not to delete, rename or add any directories.



As part of the system's functionality, your chapter will have the ability to decide if you want your chapter's document open to other chapters or not. This means that other chapters may navigate to your document library and peruse the documents (except the *Financial Document* folder which will remain under strict security). As a default, all chapters are set to share their Document Library with other chapters. If you want to change this to make it private, please contact the webmaster to update your chapter's settings.

Events & Calendar

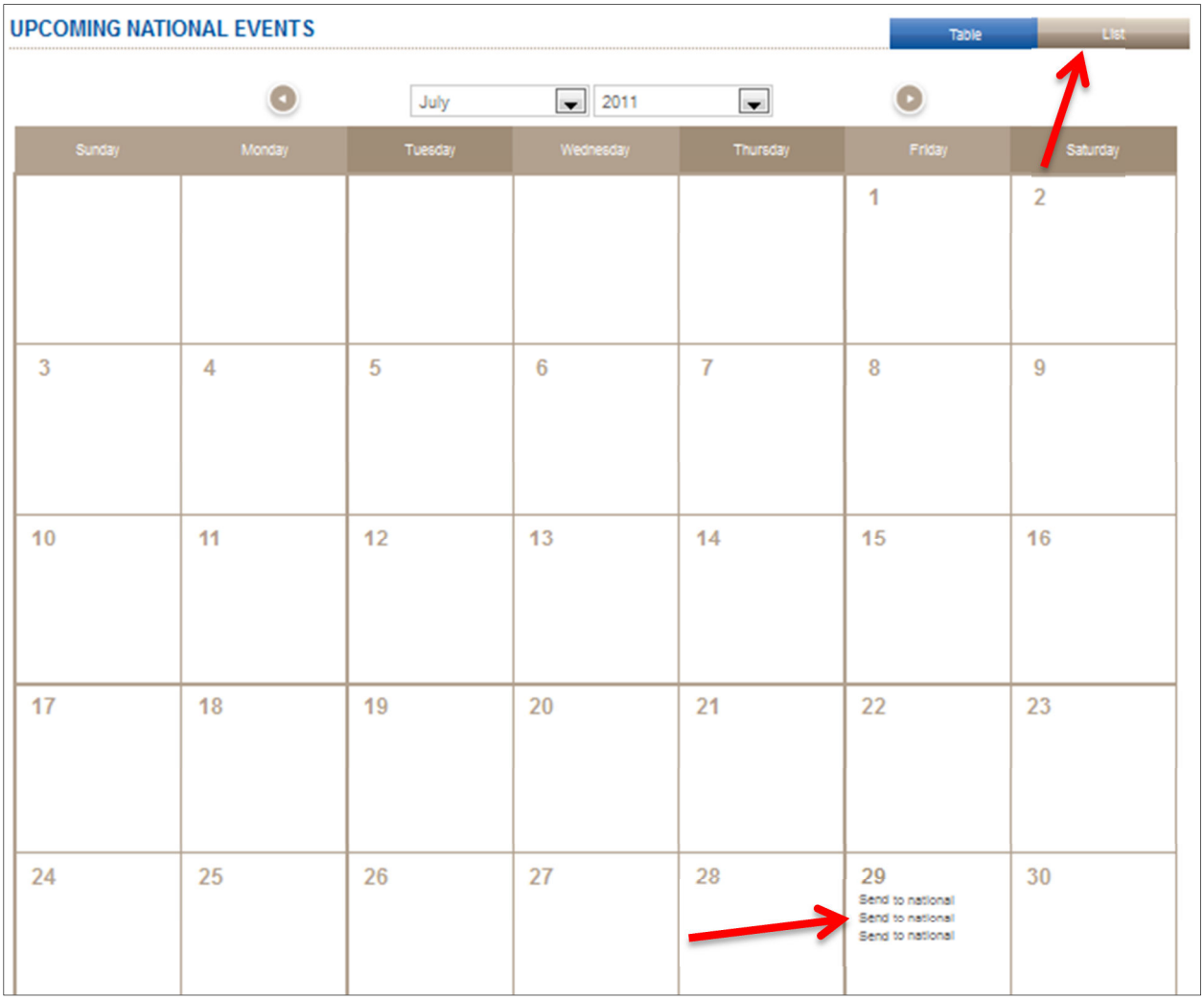
Private and Public Calendars

When creating an event content type for the calendar, you will have the option on whether or not you want that event to be viewable by only ARCS Members at your chapter or if you want the event to be public.

The private calendar appears on the secure site upon login. If you decide to make an event public, it will appear on your private calendar AND will be added to your chapter's public site calendar as well as the national calendar. The national calendar is viewable on the secure site and the public site.

Viewing a Calendar

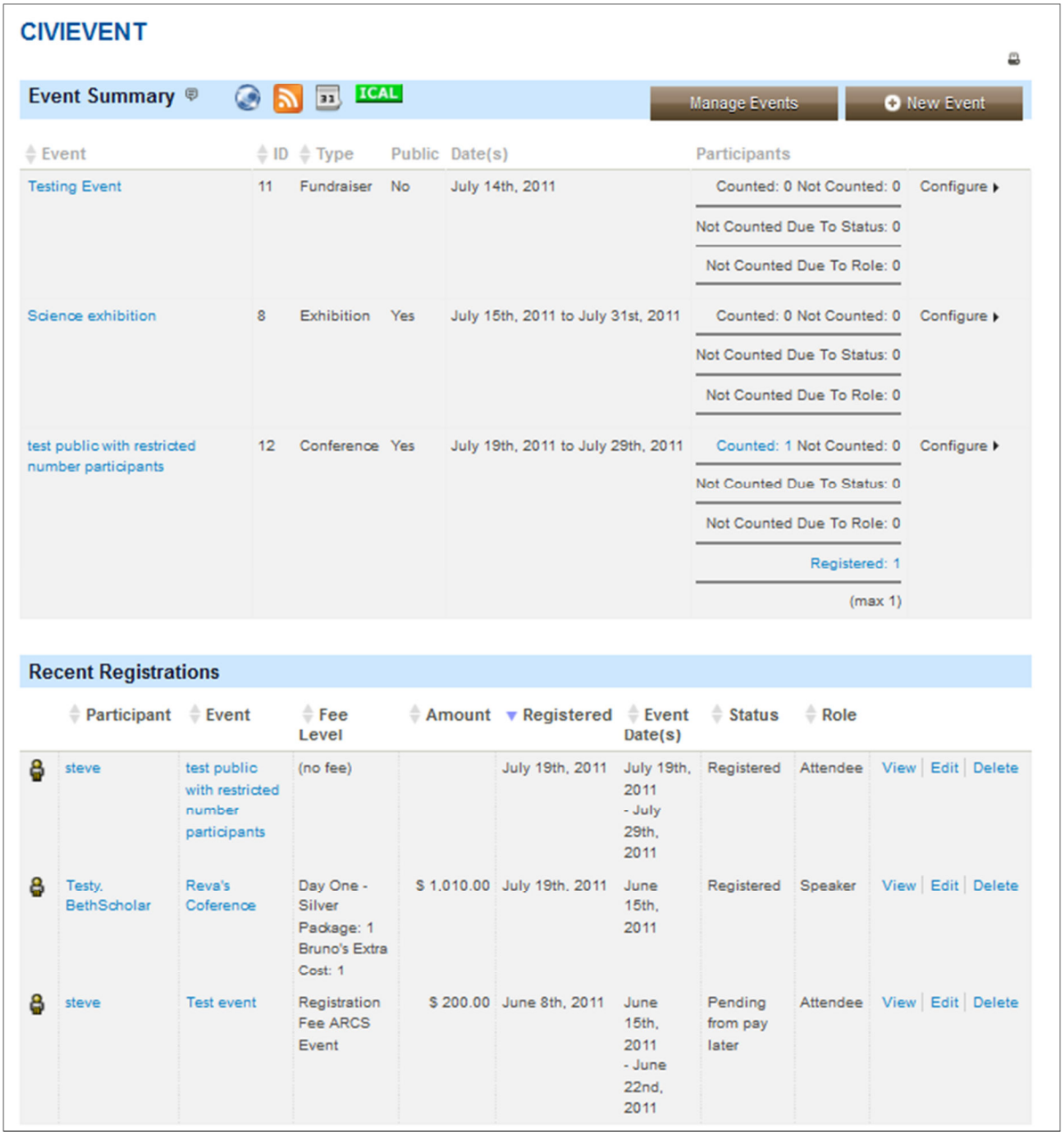
The Calendar will have all events with links (red arrow) for more details about the events (past or present). Use the month/year dropdown fields or the arrows at the top of the page to navigate the calendar. Also, to view the events in a list view click the **List** tab on the top right side of the page (green arrow). The end user can toggle between the different views of the calendar. The view will default to Table for the National Calendars and will default to List for Chapter Calendars.



New and Existing Events

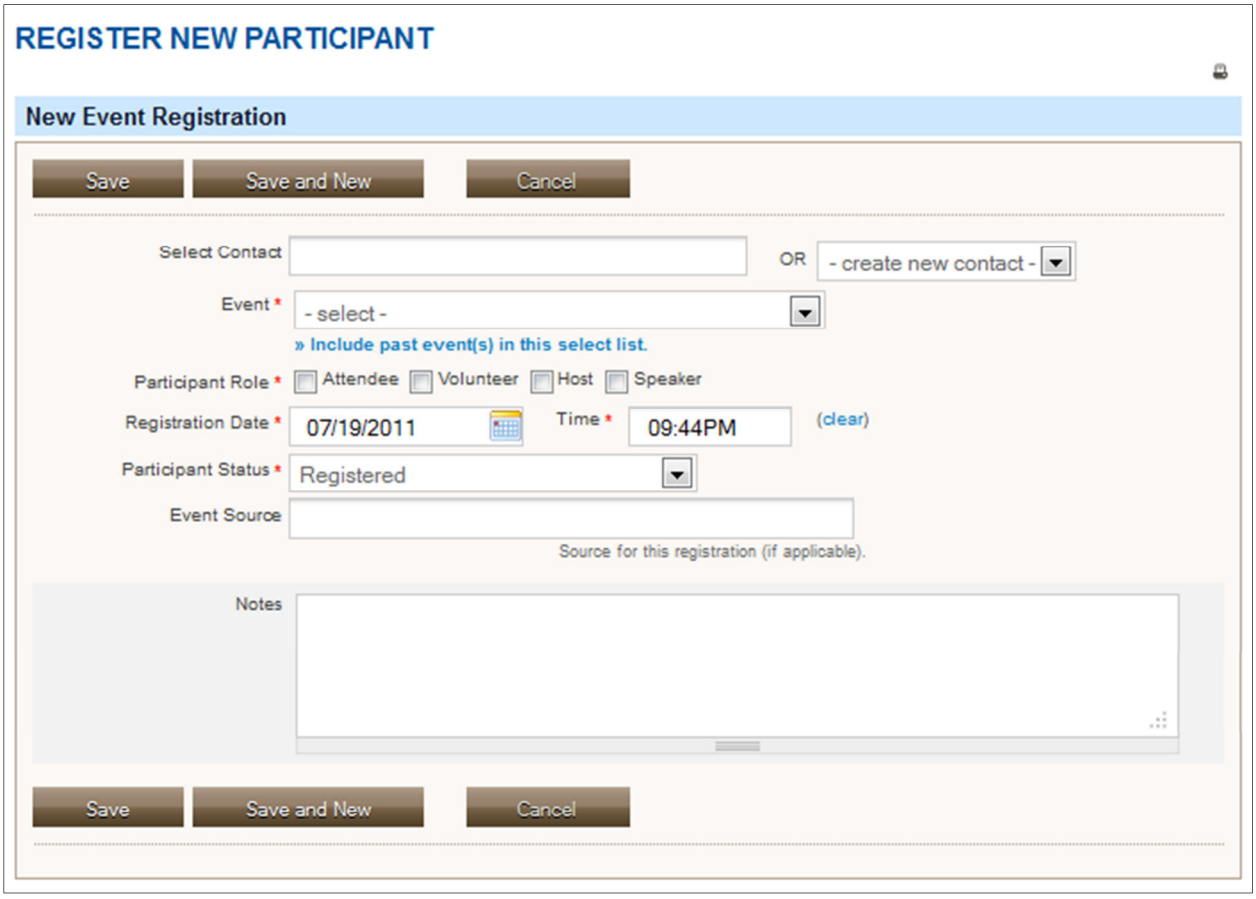
Event Dashboard

The event dashboard, similar to the other dashboards in this manual, is a great way to see a summary of events and allows the user to manage the events. By clicking on **Configure** you can edit most of the options that are available when initially creating the event. The bottom half of the page shows recent registrations and contact information of those individuals.



Register Event Participant

Registering a new participant adds a contact to a particular event. All events that are available for registration will be populated in the event drop-down field. Once a participant is registered, an email confirmation will be sent immediately.



New Event Registration Form

When creating an event, there are five pages that can be used to configure an event (many of the pages are optional). After completing a page, you may select **Save** to save progress without completing the event setup or **Save and Done.** Saved events can be accessed through the event management page and completed at another time. Don not click **Save and Done** until you have completed all the appropriate pages for your event.

If you are creating an event, please note that a contact record will be created for any registrants that are not already in your contact database. This will be especially important for the National Board to keep in mind when creating an event for NAM.

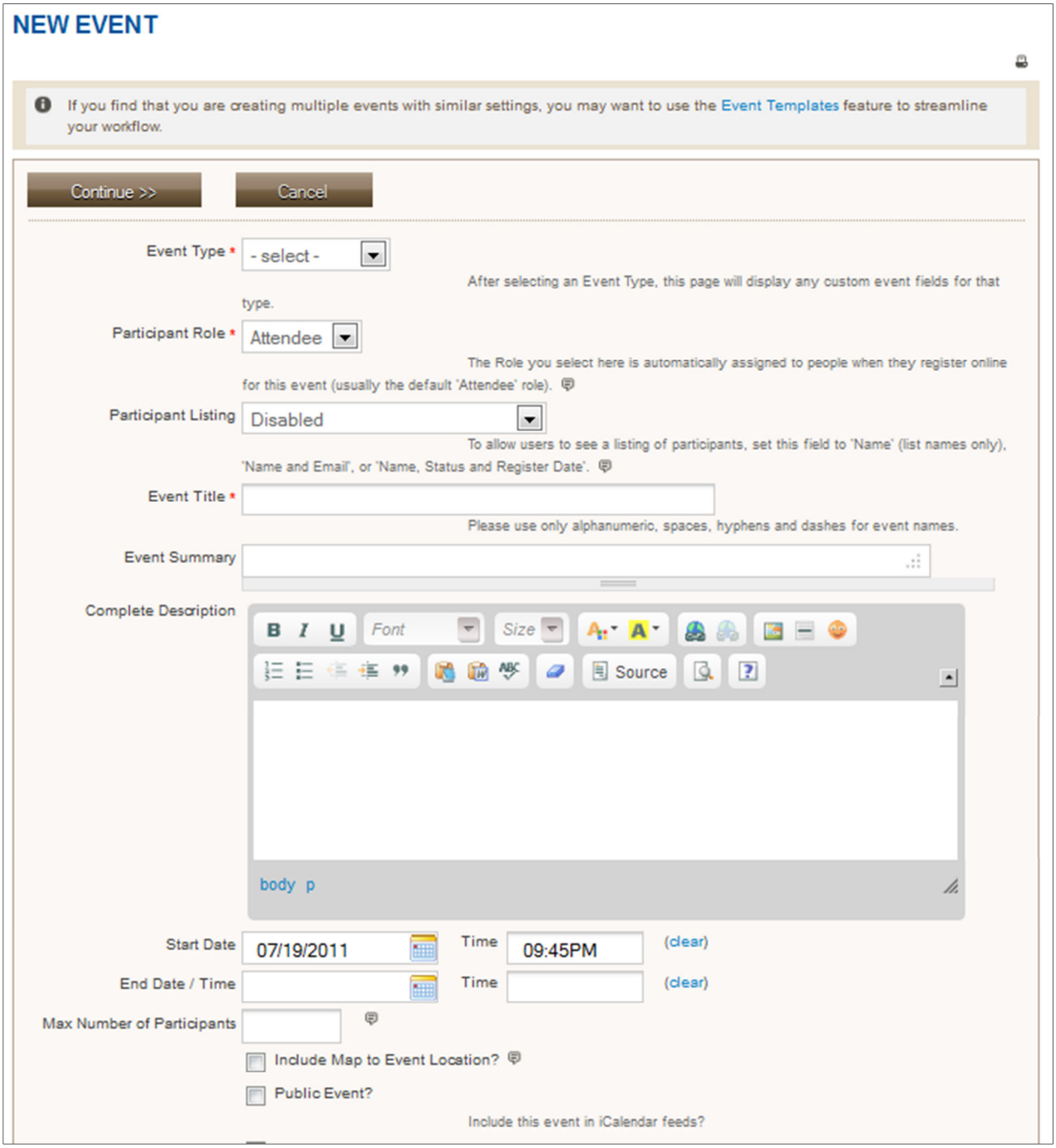
Once you are finished creating your event, you will have full control over where the registration link appears. If you want the invitation to be open to the public, you can post it to your public facing website. If you want the invitation to be private, you can send the link over email so it does not appear on your public site. If it is a members only event, you can post the link in a member announcement and/or a private calendar event such that it is only viewable when members login.

Page 1: Info and Settings. The first step to creating a new event is selecting the **Event Type**. Specific event types are: Conference, Exhibition, Fundraiser, Meeting, Performance, and workshop. The page will

display custom event fields depending on the event type. The **Participant Role** is automatically assigned to people when they register online for the event (usually the default 'Attendee' role). To allow users to see a listing of participants, set the **Participant Listing** field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'. **Event Title** must be included and the **Event Summary**, **Complete Description**, and **Date/Time** fields are recommended.

Optionally set a **Max Number of Participants** for this event. You may allow users to join a waitlist when the event is full. To enable this feature you must first enable the Participant Statuses used by the waitlist work-flow. You will need to contact the webmaster to help you set up the Participant Status rules. Then reload this form and check 'Offer a Waitlist?'. Otherwise, the registration link is hidden and the "Event Full Message"' is displayed when the maximum number of registrations is reached. Only participants with status types marked as 'counted' are included when checking if the event is full.

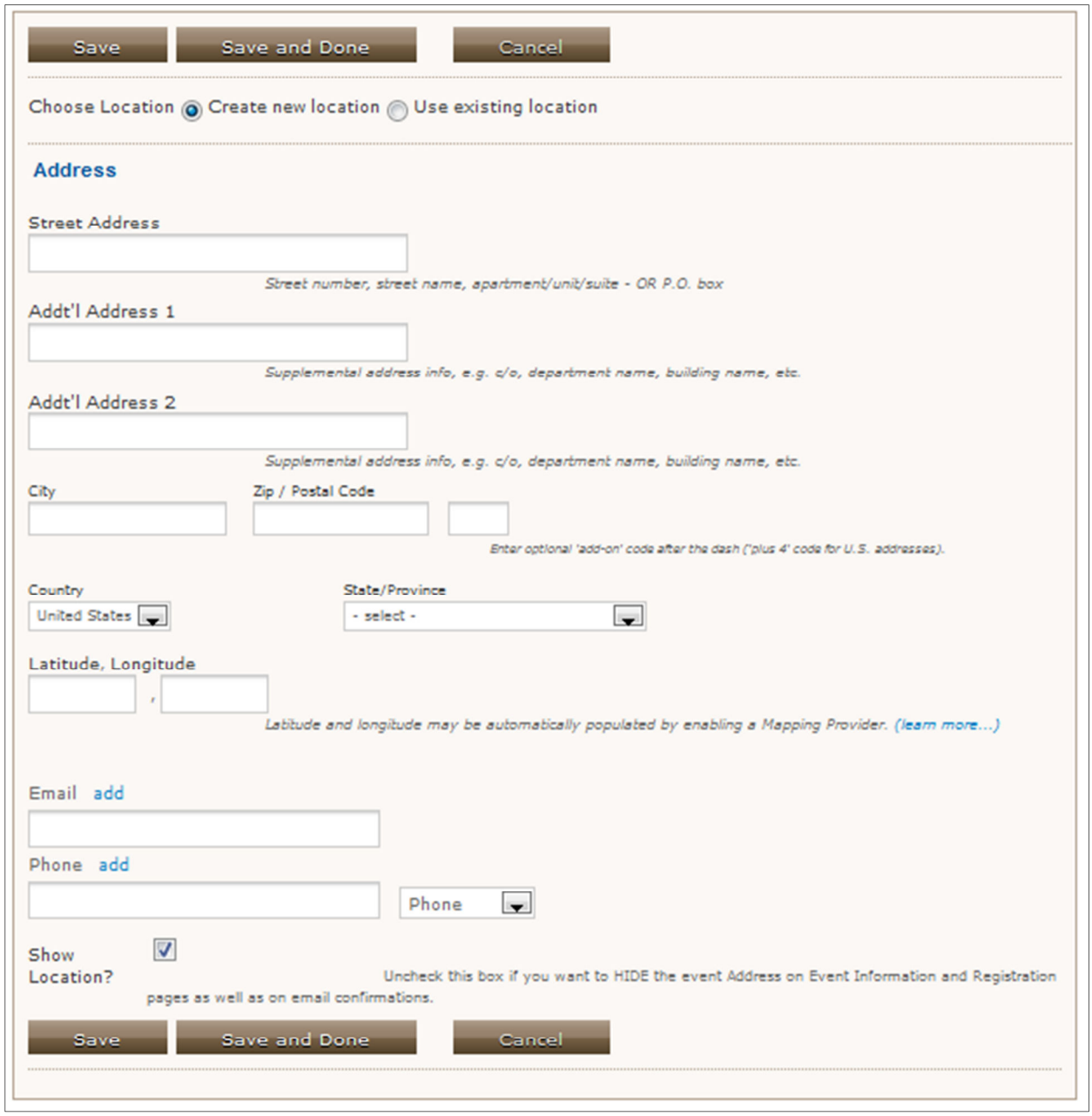
A **Map** can be included presenting event location on the event information page as long as a map provider is configured. If this is not configured properly, please contact the webmaster to update your settings. Finally, configuring an Event as **Public** allows anyone to sign up for the event and the event is included in iCalendar feeds. Labeling the event as **Active** makes registration for the event available as soon as the event is fully configured.



Page 2: Event Location. Use this page to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled.

If you are hosting an event at a previously used location, select the **Use existing location** option at the top and select your location from the dropdown list. Fields completed for the previous event will automatically populate. Otherwise, enter location information into the suggested fields (none are

required). At the end of the page, UNSELECT the **Show Location** box if you want to HIDE the event Address on Event Information and Registration pages as well as on email confirmations.



Page 3: Fees. This page only needs to be completed if the event is a paid event. If this is a paid event and you want users to be able to register and pay online, select a payment processor to use. Otherwise, you can enable the **Pay Later** feature without setting up a payment processor. If pay later is enabled, all users will then be asked to submit payment offline (e.g. mail in a check, call in a credit card, etc.) The **Fee Label** is displayed with the list of event fees. The **Pay later label** is the text displayed next to the checkbox for the 'pay later' option on the contribution form. **Pay later instructions** are added to

Confirmation and Thank-you pages when the user selects the 'pay later' option (e.g. 'Mail your check to ... within 3 business days.').

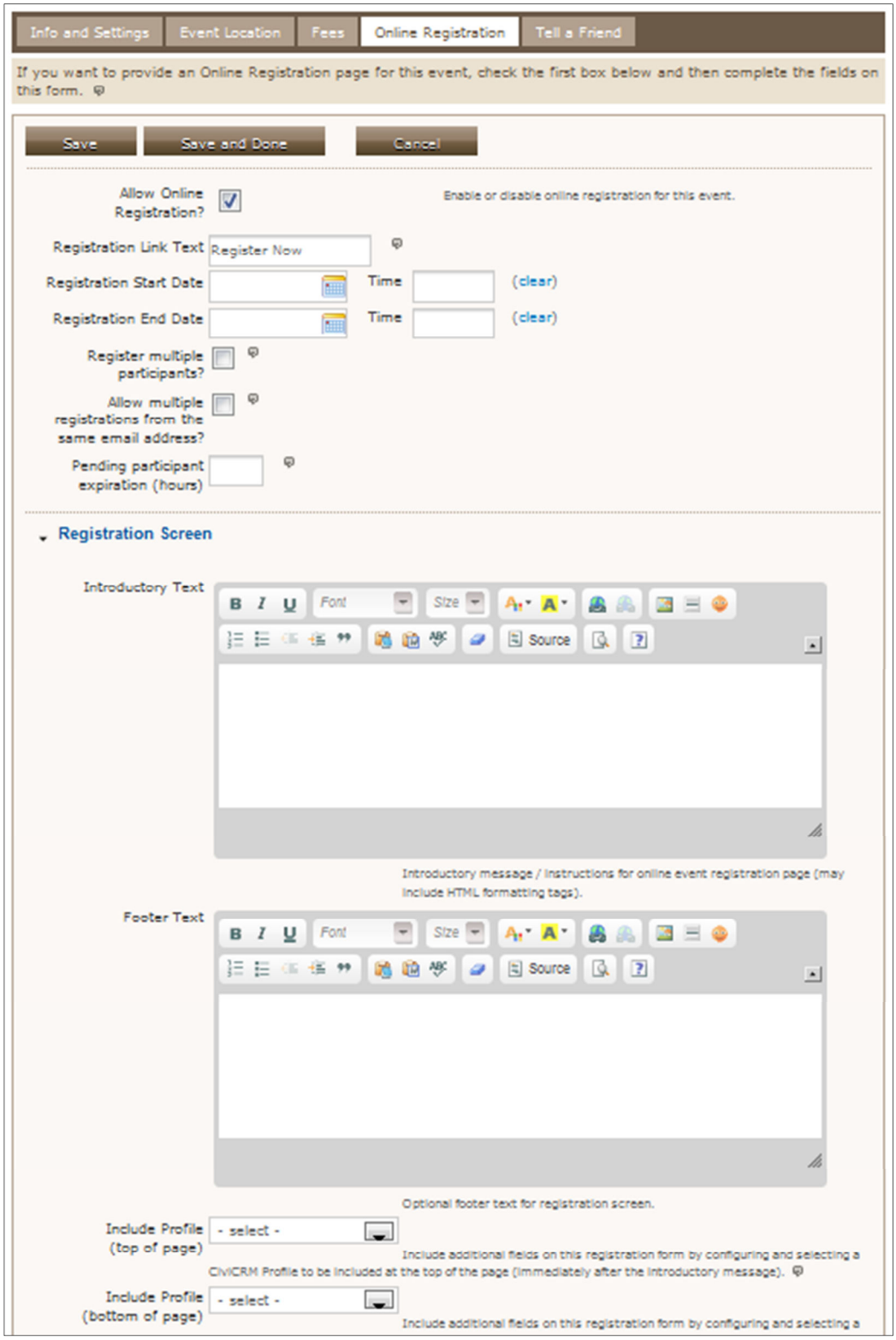
Within the **Price Set** field, select a pre-configured Price Set to offer multiple individually priced options for event registrants (see Price Sets section in the first volume of this manual). Otherwise, select "-none-" and enter one or more fee levels in the table below. For example, advanced membership - $500, regular membership -$300, limited membership-$200 (these will be the options users can select). Create or edit Price Sets by navigating Manage Contacts>> Contributions>> New Price Set.

Page 4: Online Registration. If you want to provide an **Online Registration** page for this event, check the first box on this page and then complete the appropriate fields. You can offer online registration for

both Paid and Free events. Paid events require that you have configured a payment processor for your site.

Check the **Register multiple participants** box to allow users to register themselves AND additional participants for an event. When this feature is enabled, users have the option to specify the number of additional participants they are registering for. If this is a paid event, they can select a different event fees for each participant - and will be charged the total of those fees. If a profile is included - they will complete the profile information for each participant 'Registration Link Text' will display text for link from Event Information to Event Registration pages (e.g. 'Register Now!')

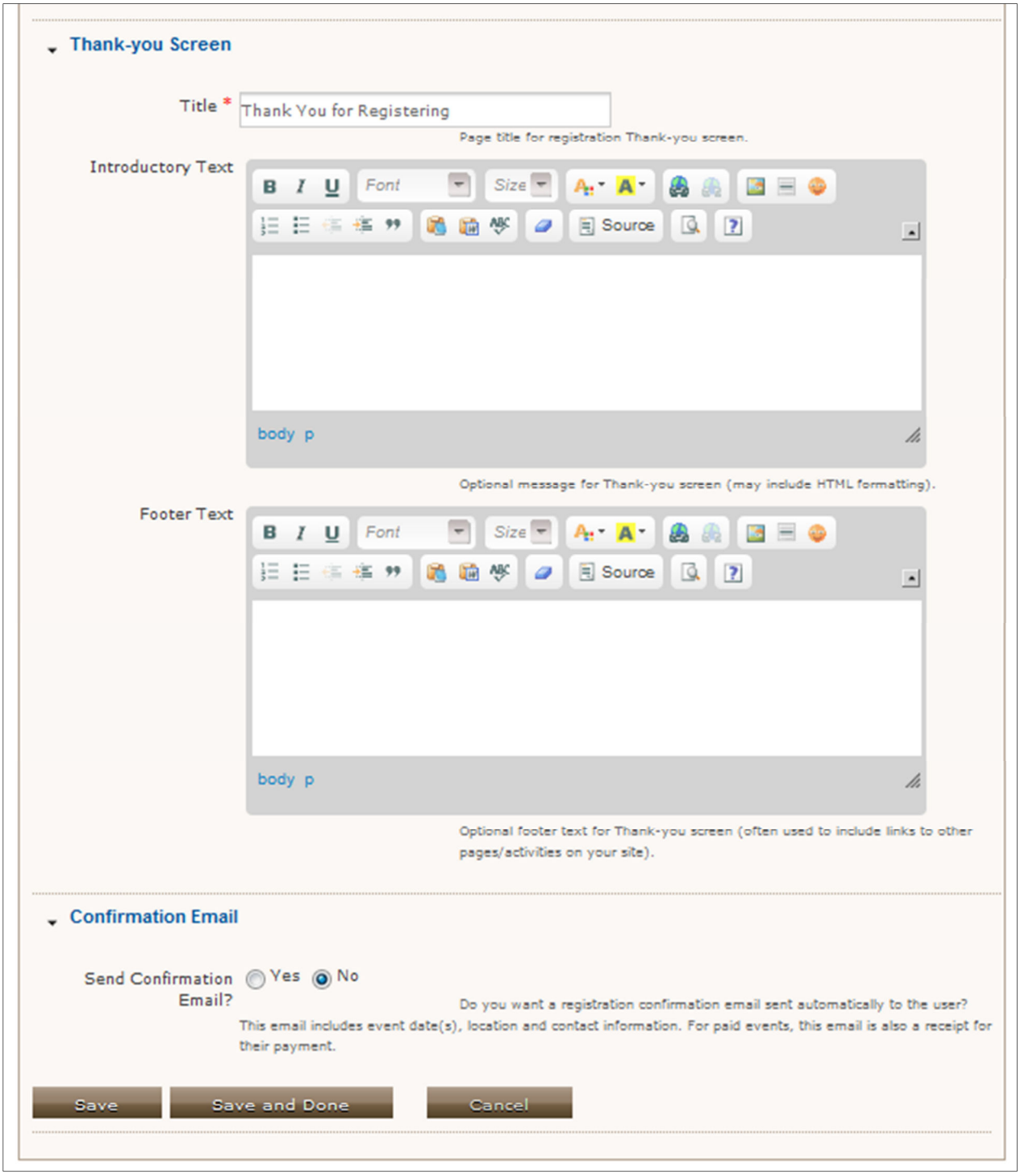
Pending participant expiration (hours) is the time limit (in hours) for confirming/finishing registration by participants with any of the pending statuses. Enter 0 (or leave empty) to disable this feature. **Introductory Text** is an initial message and instructions for the online event registrations page. If you want collect additional information during event registration, you will need to include one or two CiviCRM **Profiles**. These profiles will require registrants to provide contact info, basic information about themselves, involvement, etc. when registering. A profile can be included at the top of the page immediately after the introductory message or at the bottom of the page.



The 'Confirmation Screen' will be the screen where the registrant reviews and confirms their registration information. **Title** is required and **Introductory Text** and **Footer Text** are optional.

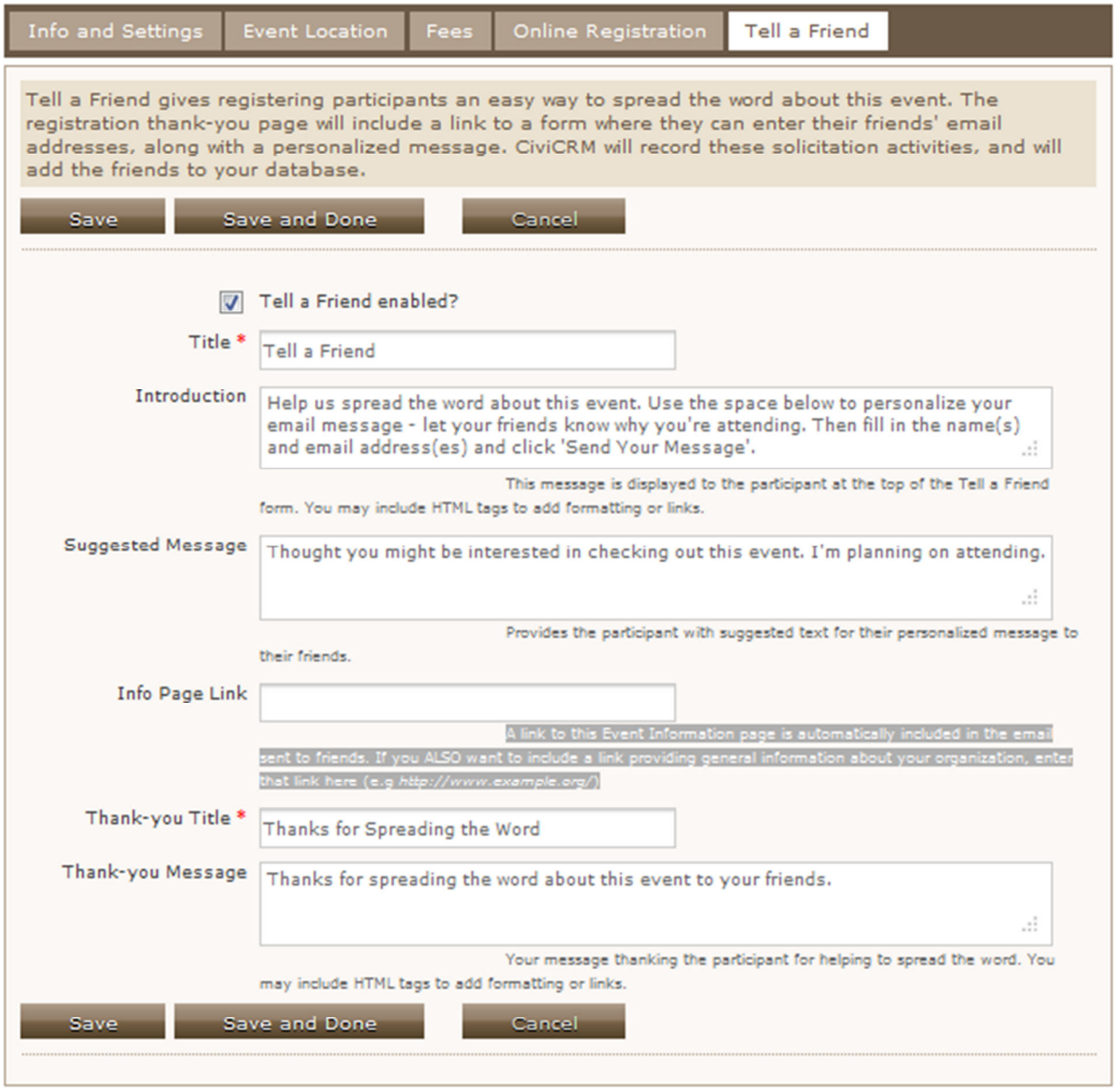
The 'Thank-you Screen' will appear after the user has confirmed their event registration. **Title** is required and **Introductory Text** and **Footer Text** are optional. **Footer Text** is often used to include links to other pages or activities on the site.

If you want a **registration confirmation email** sent automatically to the user select 'Yes.' This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.



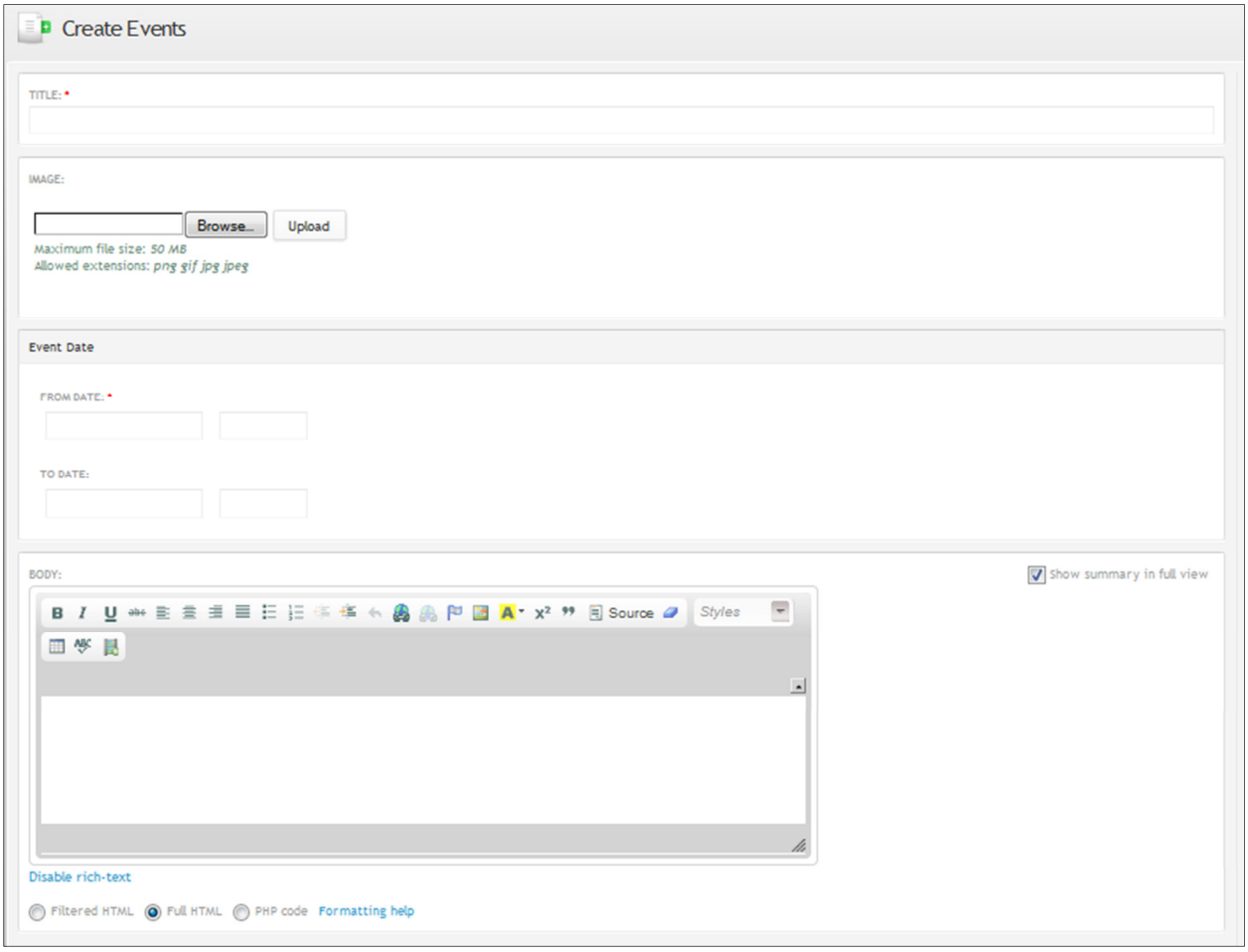
Step 5: Tell a Friend. Tell a Friend gives registering participants an easy way to spread the word about this event. The registration thank-you page will include a link to a form where they can enter their friends' email addresses, along with a personalized message. CiviCRM will record these solicitation activities, and will add the friends to your database. The **Title**, **Introduction**, **Suggested Message, Thank-you Title,** and **Thank-you Message** are already completed with suggested text. A link to the Event

Information page is automatically included in the email sent to friends. If you ALSO want to include a link providing general information about your organization, enter that link in the **Info Page Link** field.

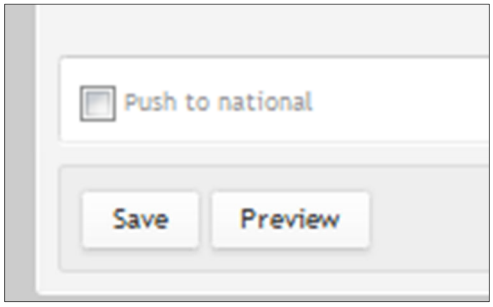


Add Event to the Chapter or National Calendar

This page will allow you to add both a public or private event to the calendar. You must fill in the title and date of the event at bare minimum and can also upload an image, the event time, and provide a description of the event. If you are using online registration for an event, this is a good place to copy/paste the registration link to.



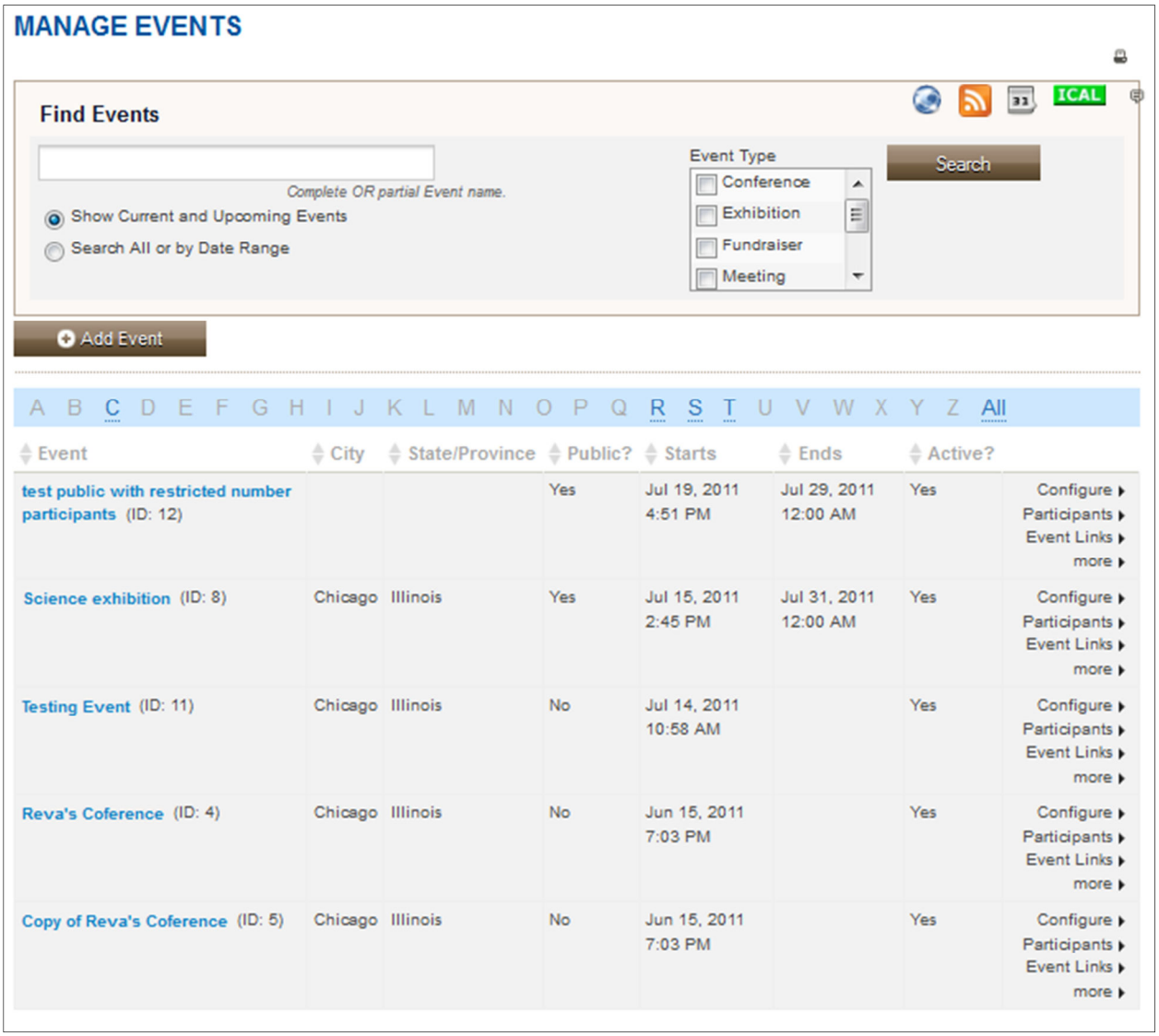
If you select **Push to national** (all the way at the bottom of the page), it is the same as stating 'this is a public event'. In your private calendar, you see all events; Public and private. This way, we can expose the public calendar to all and a logged in member can still see a separate, single calendar with both private and public events without having to navigate between the 2 calendars. Finally, events will only populate the calendar if they are saved.



Manage Events

The manage events page allows the user to sift through events by entering the name of the event, picking the event type, or choosing the first letter of the event name. Once the user has found the event

they are searching for, they can edit or alter the event just as they could have when they were initially creating the event.



Event Templates

This is the same as creating an event except that you can save it as a template to reuse. If you find that you are creating multiple events with similar settings, you may want to use the Event Templates feature to streamline your workflow.

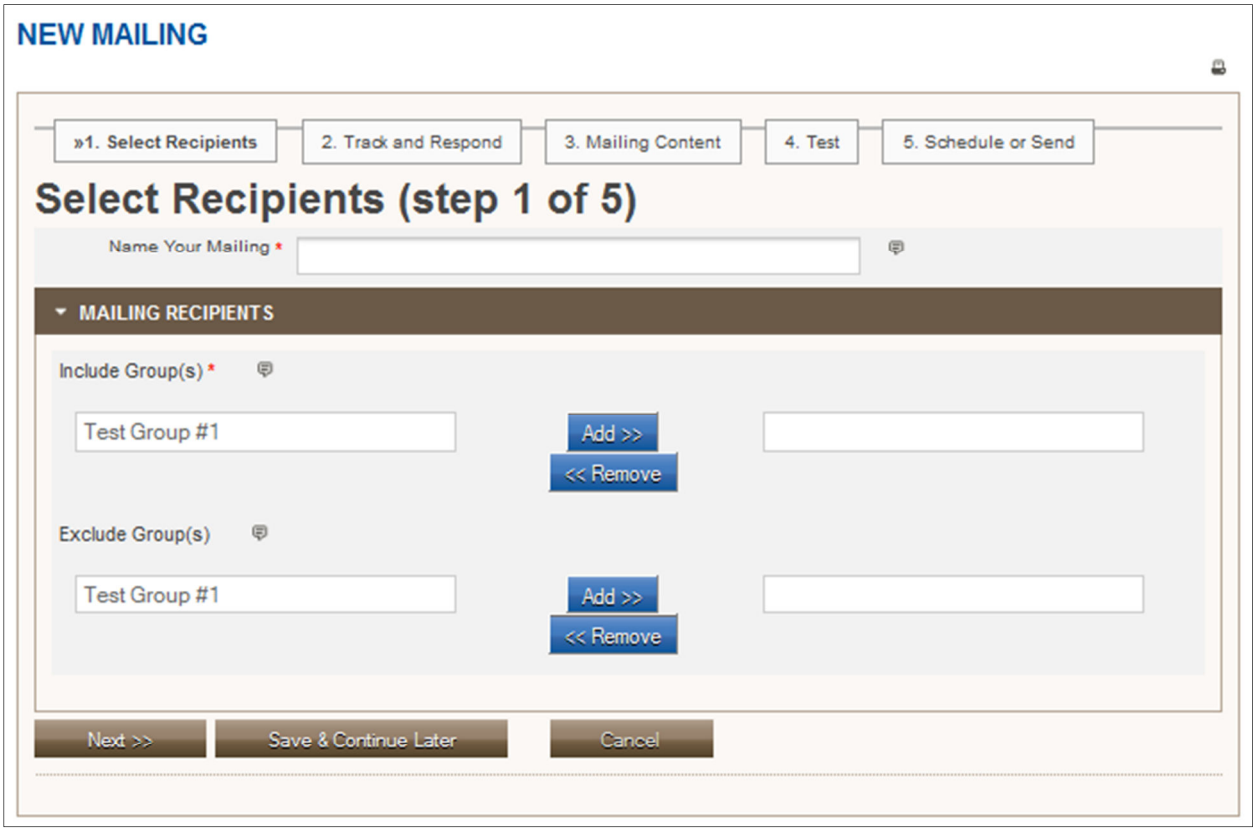
Past Events and Silent Auctions

These are basic content pages for your chapter to store information for member eyes only. You can disable these pages if your chapter does not want to use them.

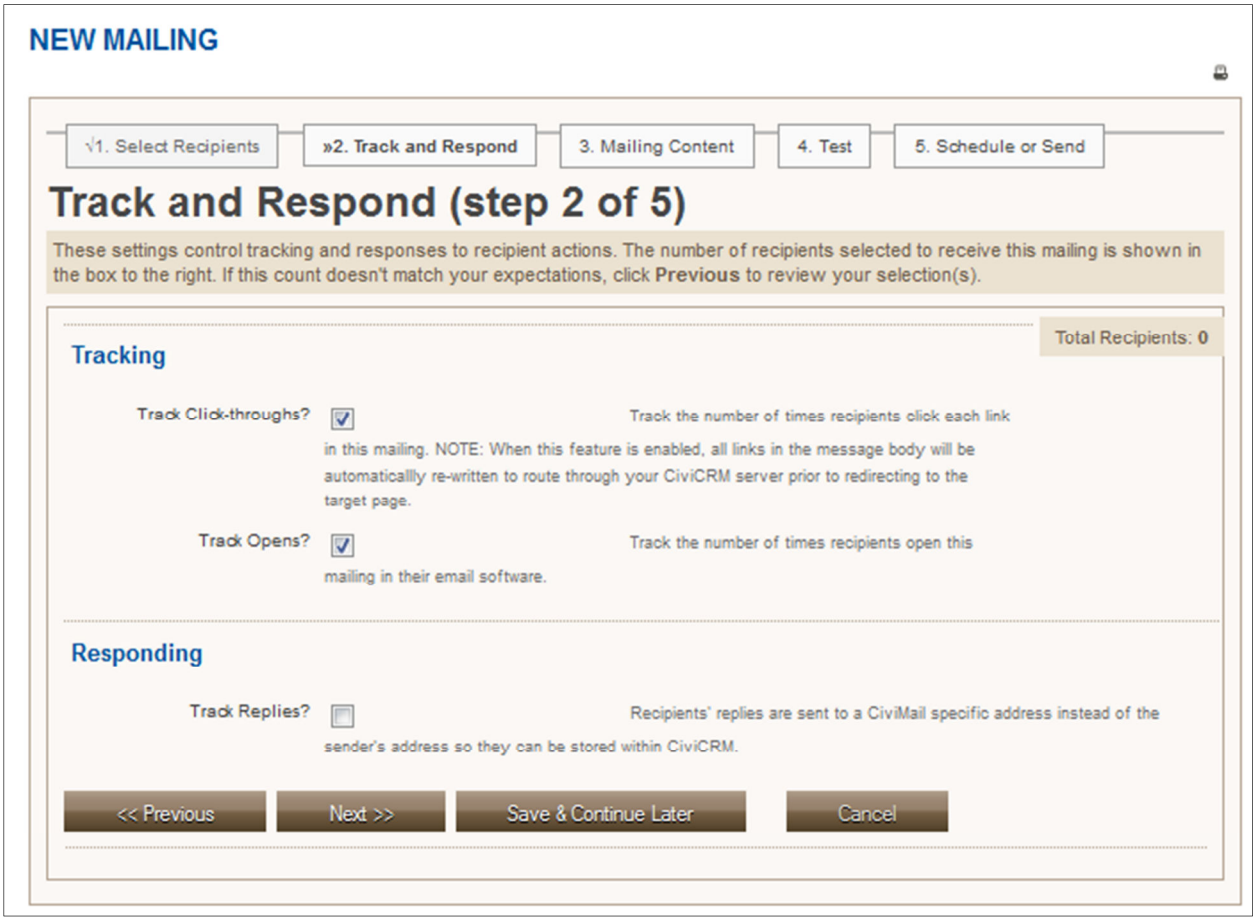
Manage Mailings

New Mailing

Step 1: Select Recipients. After navigating to the 'New Mailing' page, the user will initially see the page shown below. To start drafting a new email, type the **Name of Your Mailing** (at the top), **Include Groups** you would like to send the mailing to, and click the **Add** button. If it is more convenient, the user could first select all, and then exclude certain groups.

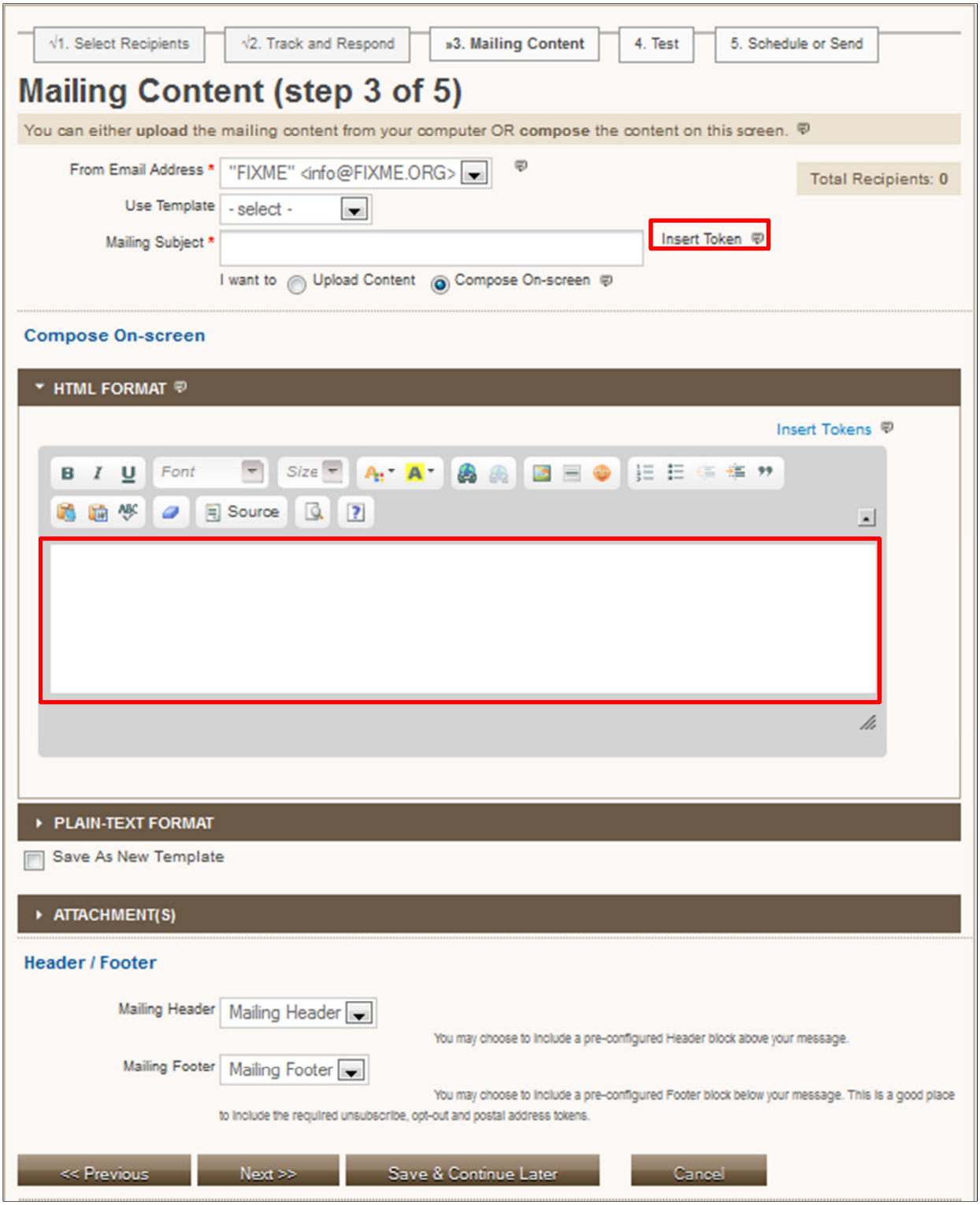


Step 2: Track and Respond: Track and respond preferences are identified on this page. The user has the option to track **Click-throughs**, **Track opens**, and **Track replies**. Tracking click throughs will record the number of times links within an email are accessed. CiviCRM does this by routing the link to the Civi database before redirecting to the linked page. Tracking opens records the number of times an email is opened. Finally, Tracking Replies sends recipients' email replies to a Civimail address instead of the sender's address so they can be stored within CiviCRM.



Step 3: Mailing Content. In this step, the user will compose the actual mailing. The **From Email Address** and the **Mailing Subject** fields must be completed. To the right of the mailing subject dialogue box, the user may select **Insert Token** (red box)**.** Use a token in the Subject when you are sending mail to a number of recipients and want to include their name and/or other values from their contact record automatically in the subject line.

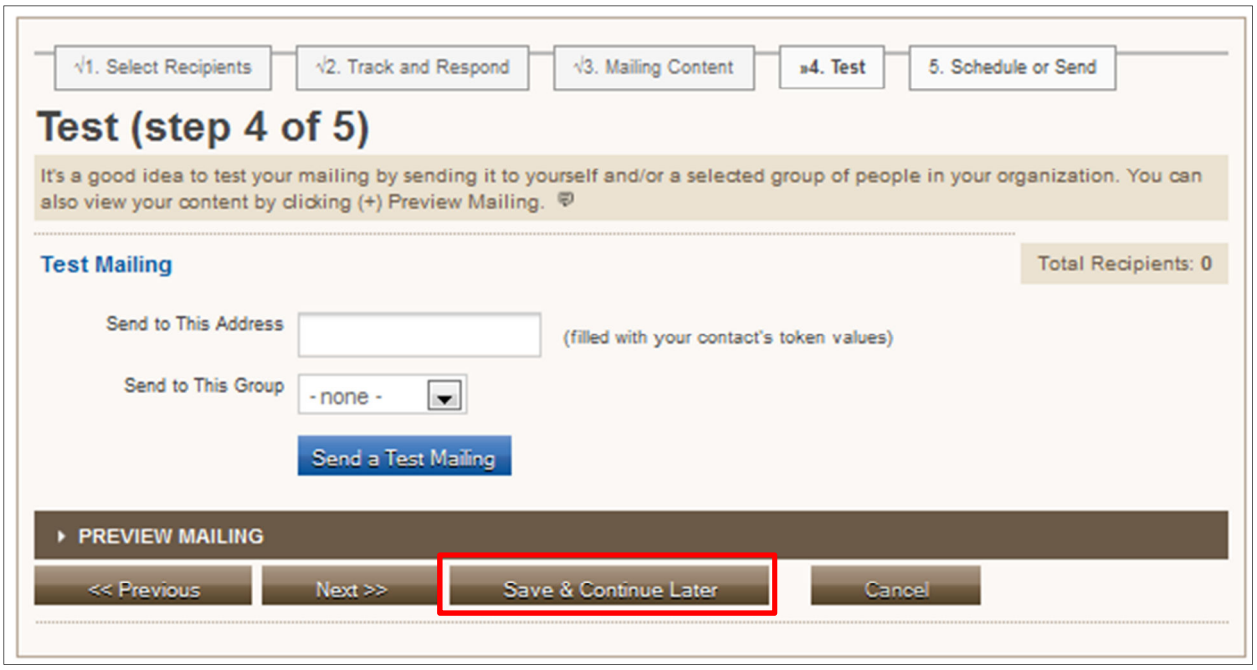
As far as creating the body content, the user has several options. The option to **use a template** is available and there will be a dropdown list containing all available templates. Selecting a template will populate the red box below with previously created content and you can make modifications as necessary. A template will not be ideal for all situations, so you can create your own mailing content from scratch. The editing toolbar is similar to word-- If you have question about the functionality of the toolbar, reference the content management training manual. **Updating a template** or **saving the mailing as a new template** is easily done by selecting one of the options beneath the 'Plain-Text Format' heading. The final way to generate mailing content is by uploading content. Clicking **Upload Content** allows the user to select content from in TEXT or HTML format (Note: these are the only formats that are compatible). An optional **Header** or **Footer** may be added to the mailing as well. Headers and footers are created and saved on another page within CiviCRM, but all available headers and footers will appear in the dropdown lists.



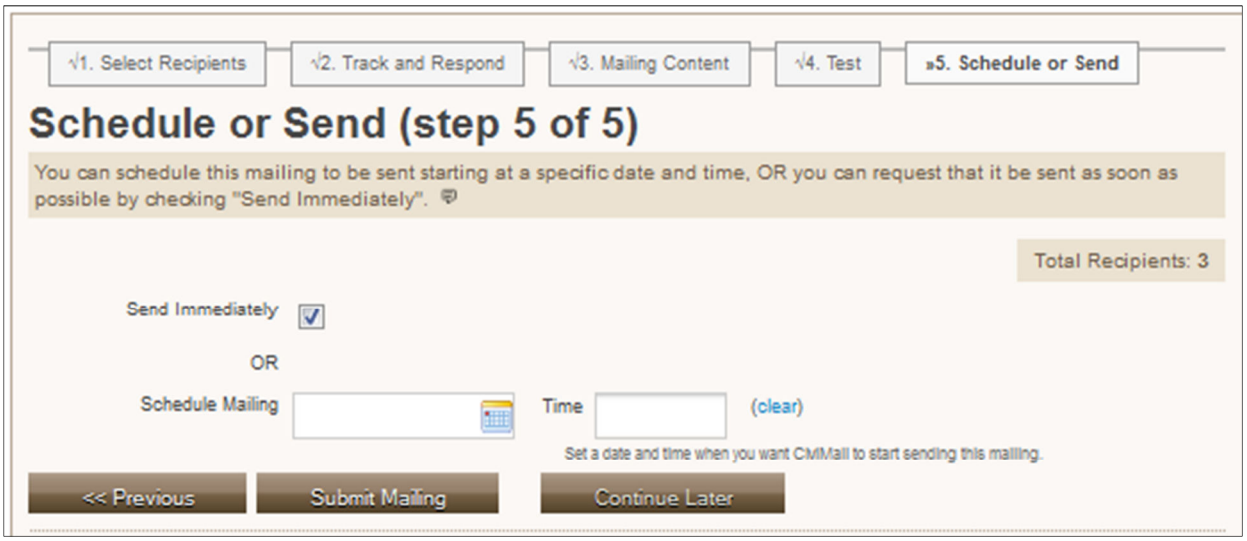
Step 4: Test. Test a mailing by sending the mailing you've created to a personal address or a group. This way, you can view the email just as the people receiving it would. Test mailings are particularly useful

for massive email blasts or emails with a large amount of content. Expanding the 'Preview Mailing' header will show a preview of the email. Note: The test step **is not** required.

Additional Note: The user may stop in the middle of the New Mailing process and save all progress by selecting the **Save & Continue Later** button (red box). The email can then be accessed by finding it on the 'Draft and Unscheduled Mailings' page.

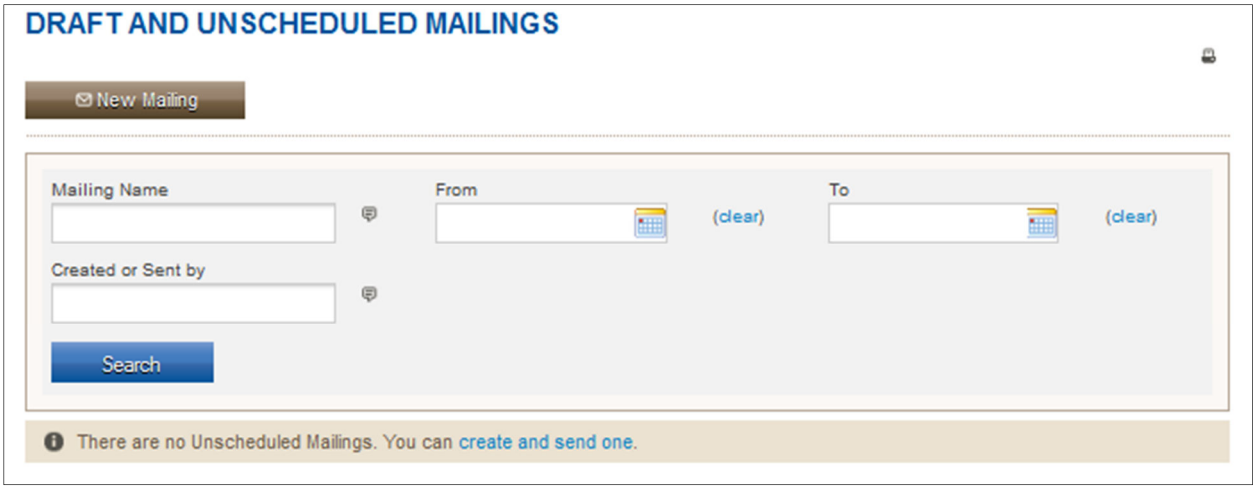


Step 5: Schedule or Send. In the final step of the mailing process, the user can decide to **Send Immediately** or can set the date and time the email will be sent.



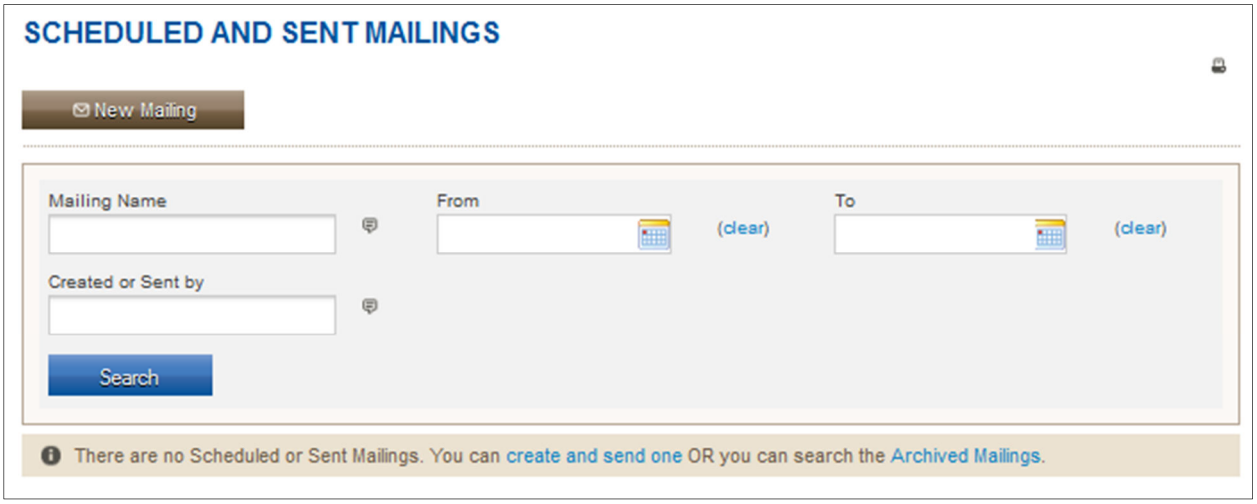
Draft and Unscheduled Mailings

If a mailing has been partially created or was created but never sent, you can find it by filling in one or more of the search fields below. Once you identify the proper mailing, you may finish and send (or save a draft as an unscheduled mailing). Search results will appear in the area that says "There are no Unscheduled Mailings." This is a good place to store mailings that must be reviewed by several people before final approval to send out.

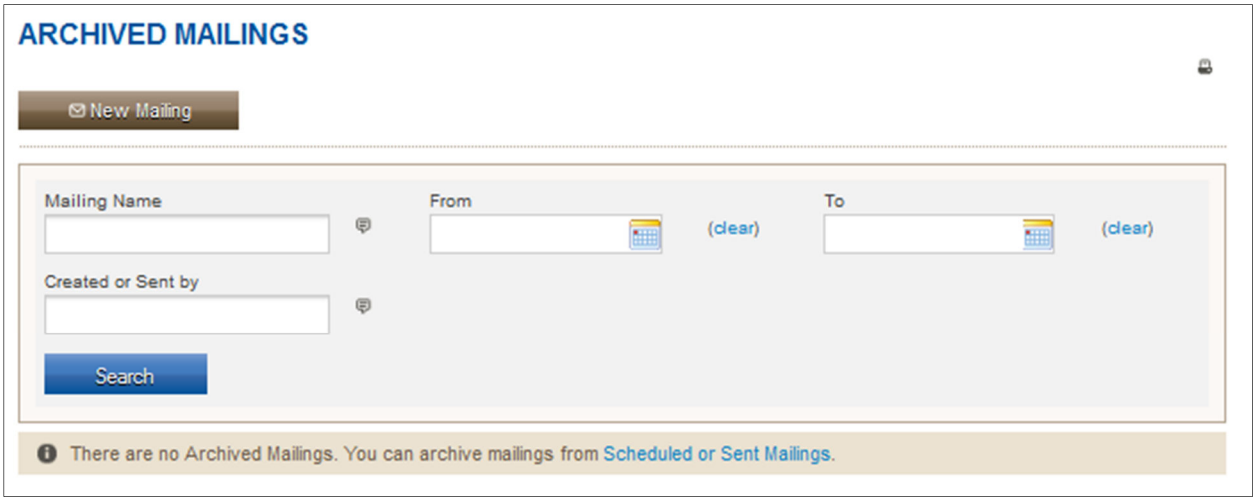


Scheduled and Sent Mailings

Search for any scheduled and sent mailings the same way you would search drafts and unscheduled mailing (above).



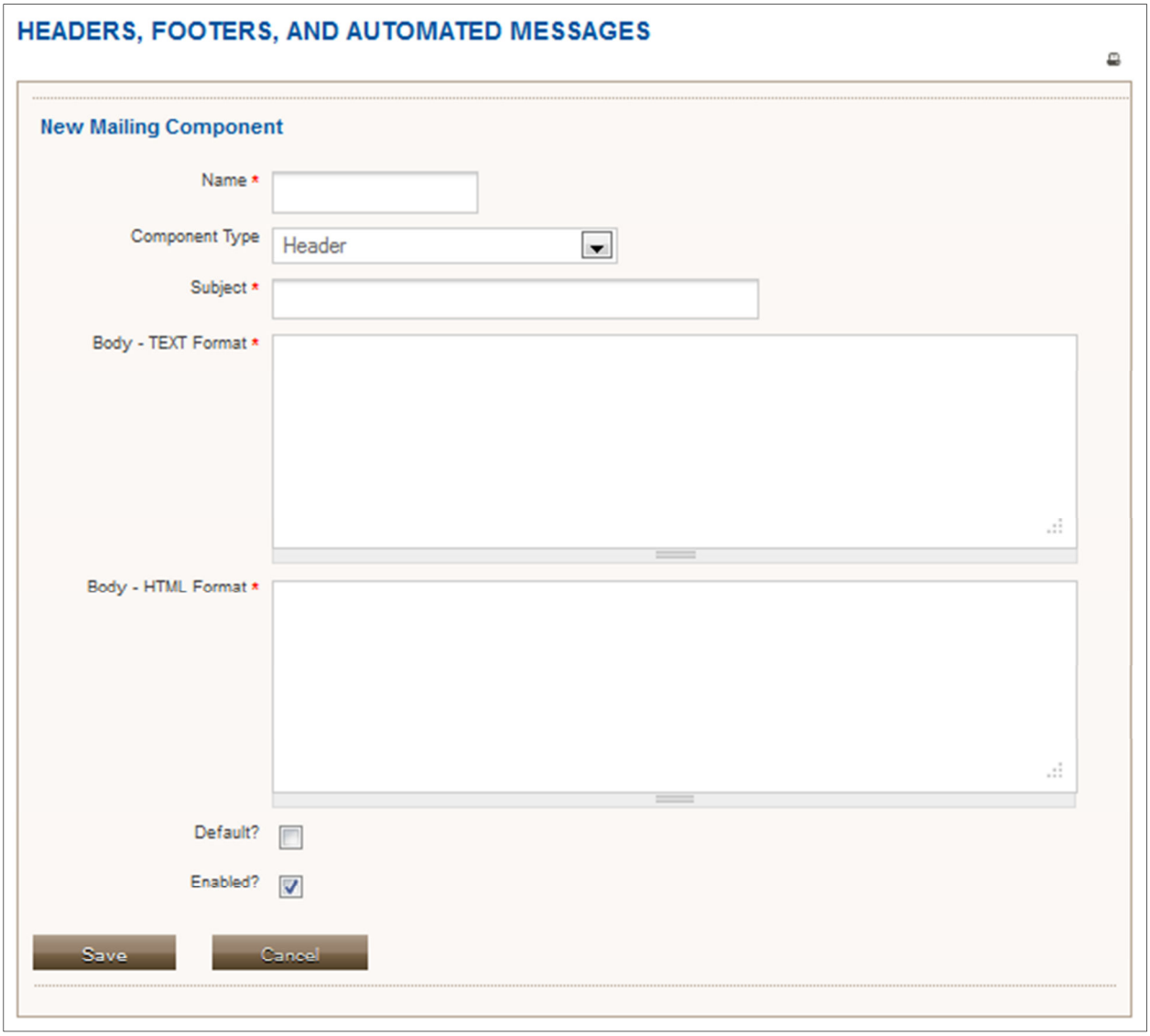
Archived Mailings



Headers, Footers, and Automated Messages

To streamline and standardize much of the mailing process on CiviCRM, Headers, Footers, and Automated Messages can be created and utilized. The available mail component types are Header, Footer, Reply Auto-Responder, Opt-out message, Subscription Confirmation Request, Welcome Message, Unsubscribe Message, and Resubscribe Message. All previously created mail components will be listed on this page with details. The green checkmark under default indicates that the component is automatically included as an option within appropriate mailings. A mail component that is enabled will be an available option within mailings and disabled components will not appear as options. To **disable** or **edit** a component, select one of the options in the far right column.

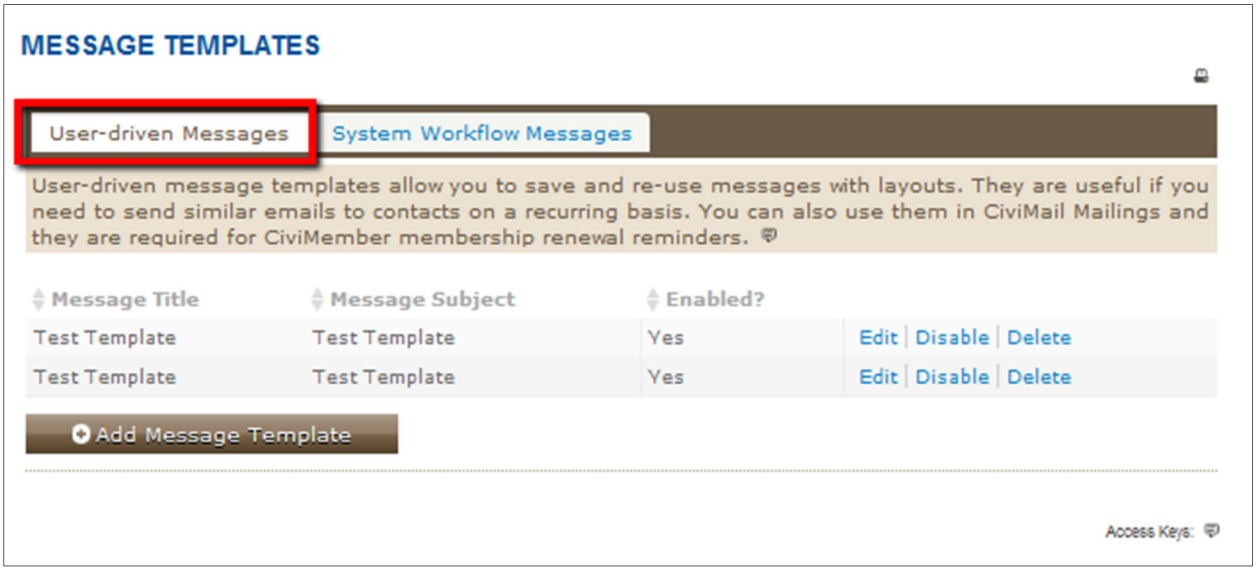
To add a new component, click the Add Mailing Component button at the bottom of the page (red box above) and the page below will appear. Insert the **Name** of your new mailing component, identify the **Component Type**, fill in the **Subject** line, give the component a **Body** (both TEXT and HTML), choose whether this component will be **Default** or **Enabled**, and click **Save**. The new component will appear with the rest of the components on the page above. Once again, you will be able to edit this component at any time after it is created.



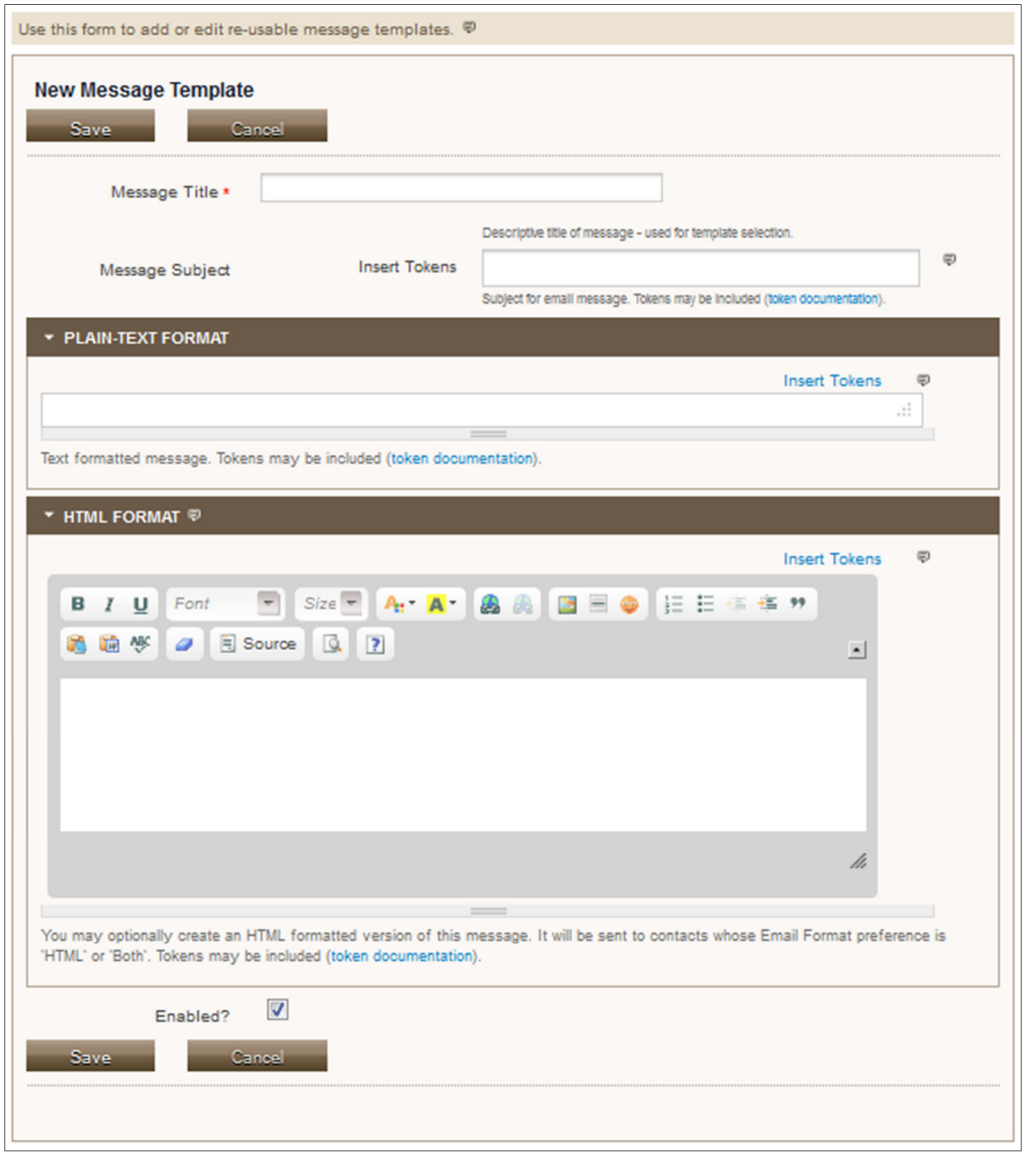
Message Templates

Message Templates are a great way to use create layouts or save emails that will be sent out many times. You can use them when sending email to one or more contacts. If you are using the CiviMail component - you can use templates for your messages. If you are using the CiviMember component, you will need to create one or more message templates for membership renewal reminders. Recall earlier in this manual (in the 'New Mailing' section), templates can be selected when creating a mailing.

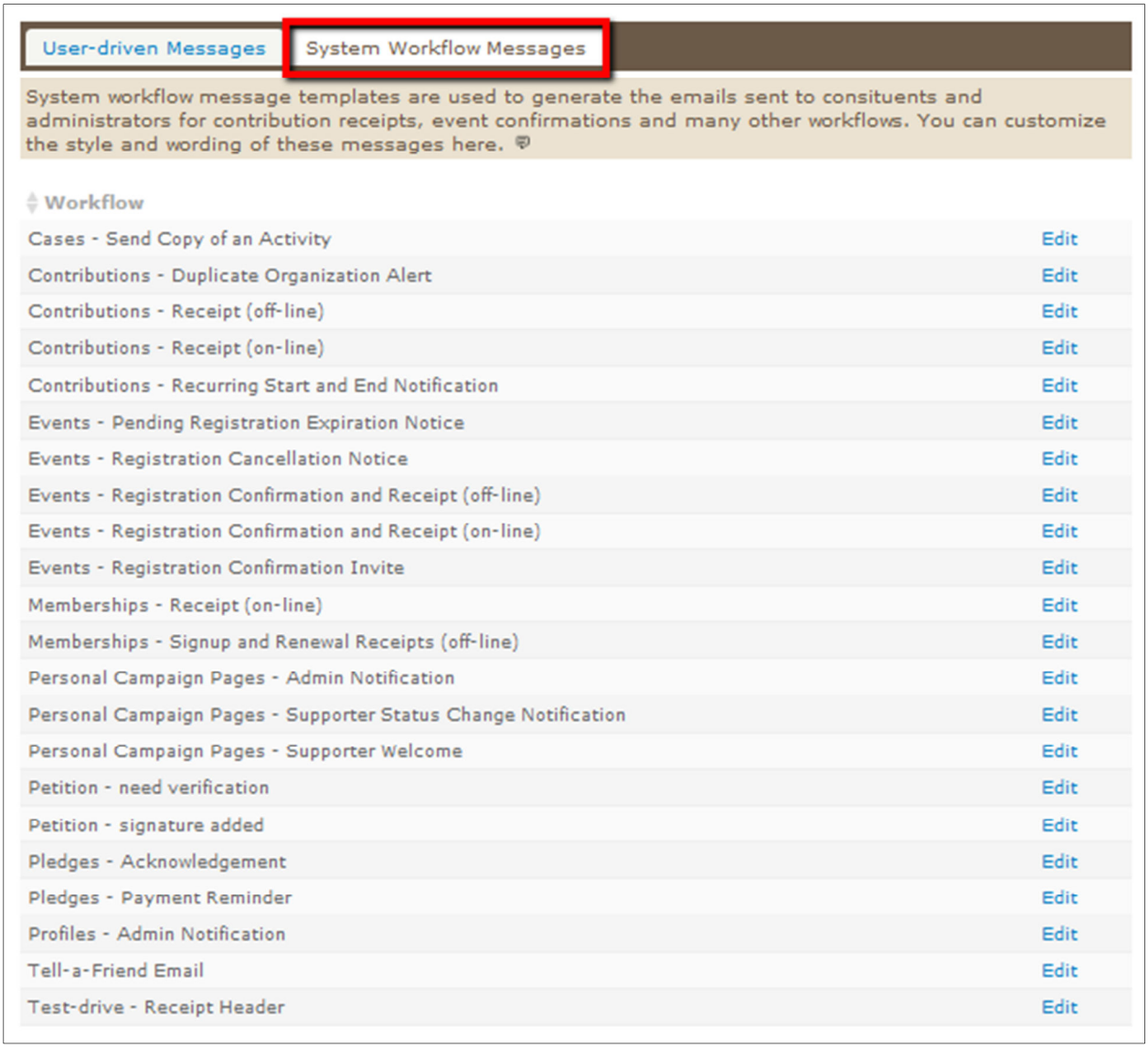
User-driven message templates allow you to save and re-use messages with layouts. They are useful if you need to send similar emails to contacts on a recurring basis. You can also use them in CiviMail Mailings and they are required for CiviMember membership renewal reminders. All User-driven Message Templates will appear in the window below. You can edit, disable, or delete these templates at any time. Enabling a template means it will be included in the template dropdown list when users create new mailings.



Create a new template by clicking the Add Message Template button at the bottom of the page. The New Message Template window will appear and the user can craft the template by filling in the appropriate fields. After saving, the new template will appear in the list of templates above.

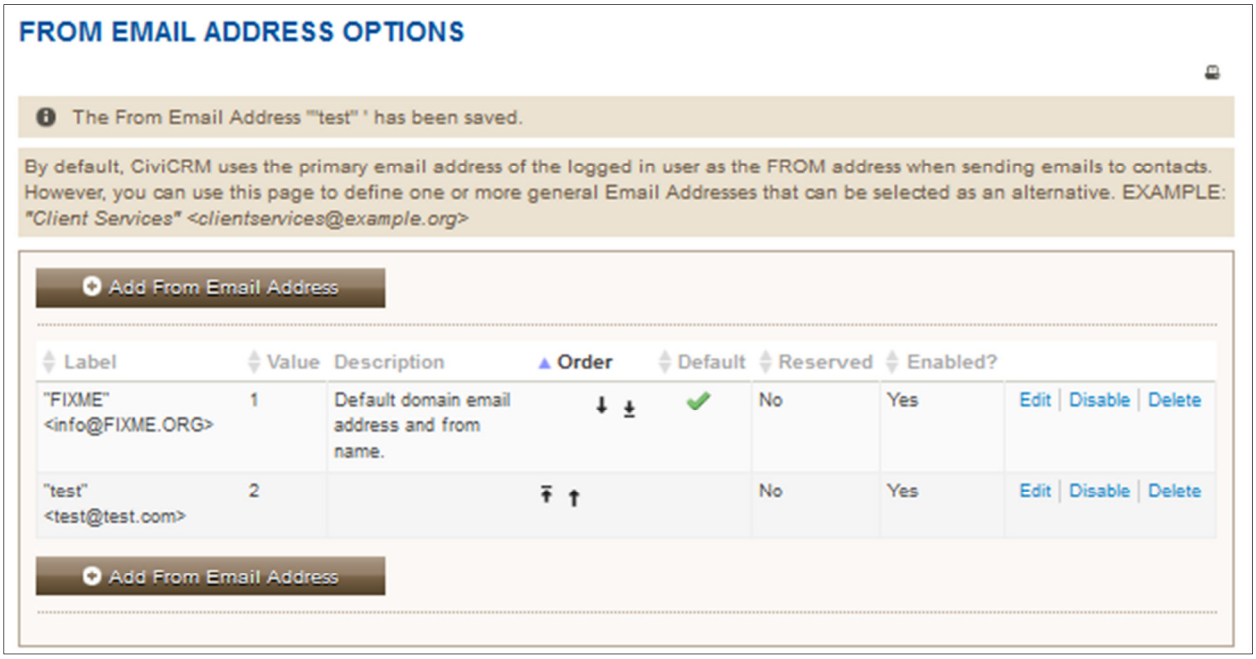


System workflow message templates are used to generate the emails sent to constituents and administrators for contribution receipts, event confirmations and many other workflows. You can customize the style and wording of these messages here. Workflow messages include text AND necessary program logic. Use caution when editing so as not to modify the program logic. Be sure to test the workflow and review the emails sent after making any changes. If you find that your changes have caused problems, errors or missing information - you can always "Revert" to the system default for that workflow.

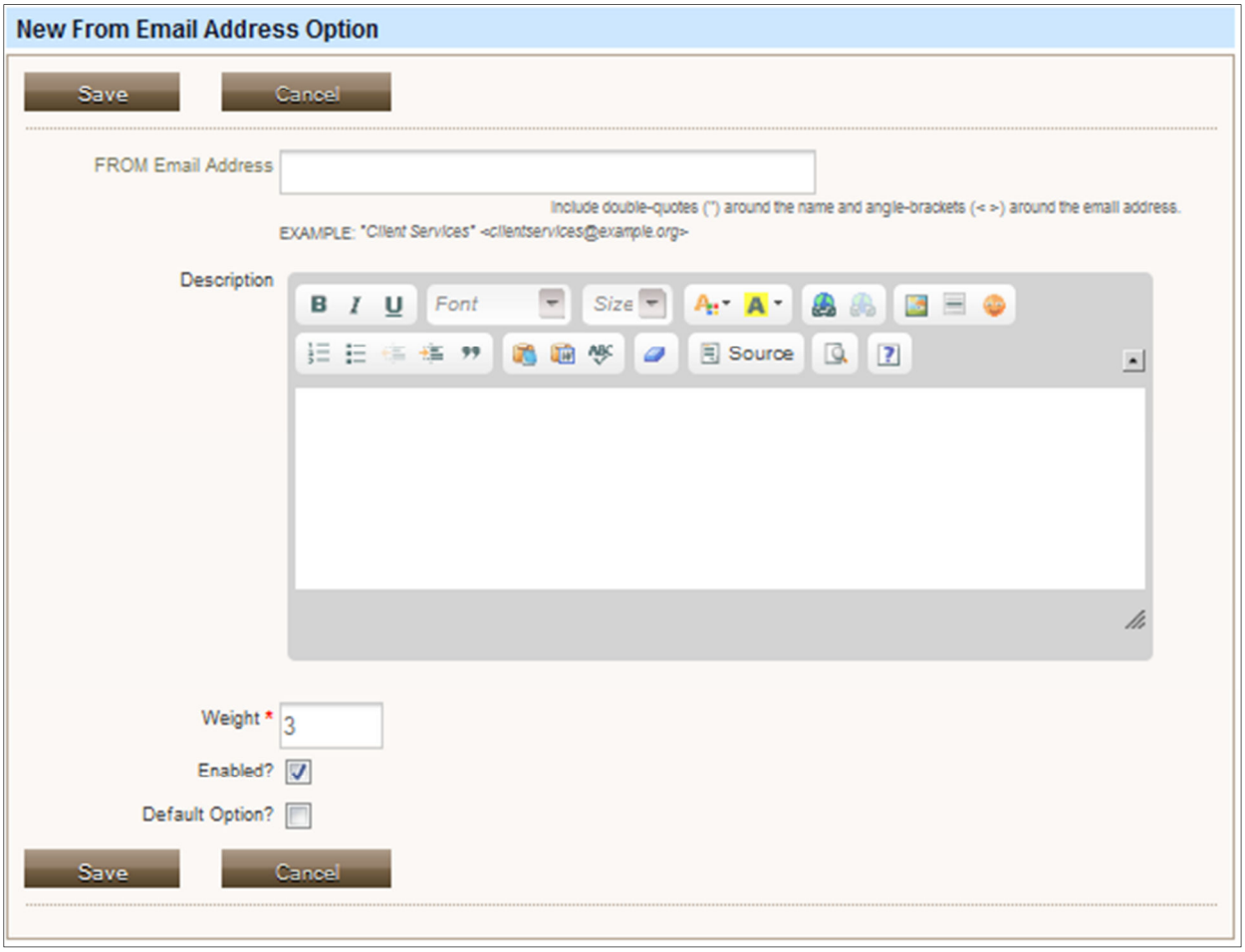


From Email Addresses

By default, CiviCRM uses the primary email address of the logged in user as the FROM address when sending emails to contacts. However, you can use this page to define one or more general Email Addresses that can be selected as an alternative. EXAMPLE: *"Client Services" <clientservices@example.org>.* This is a good place to put your chapter's general email address. The address with the green check in the default column will be the email addressed that is used. To change the primary email address, click on the black arrows under the Order column. Also, the order and all other options can be changed by clicking Edit.



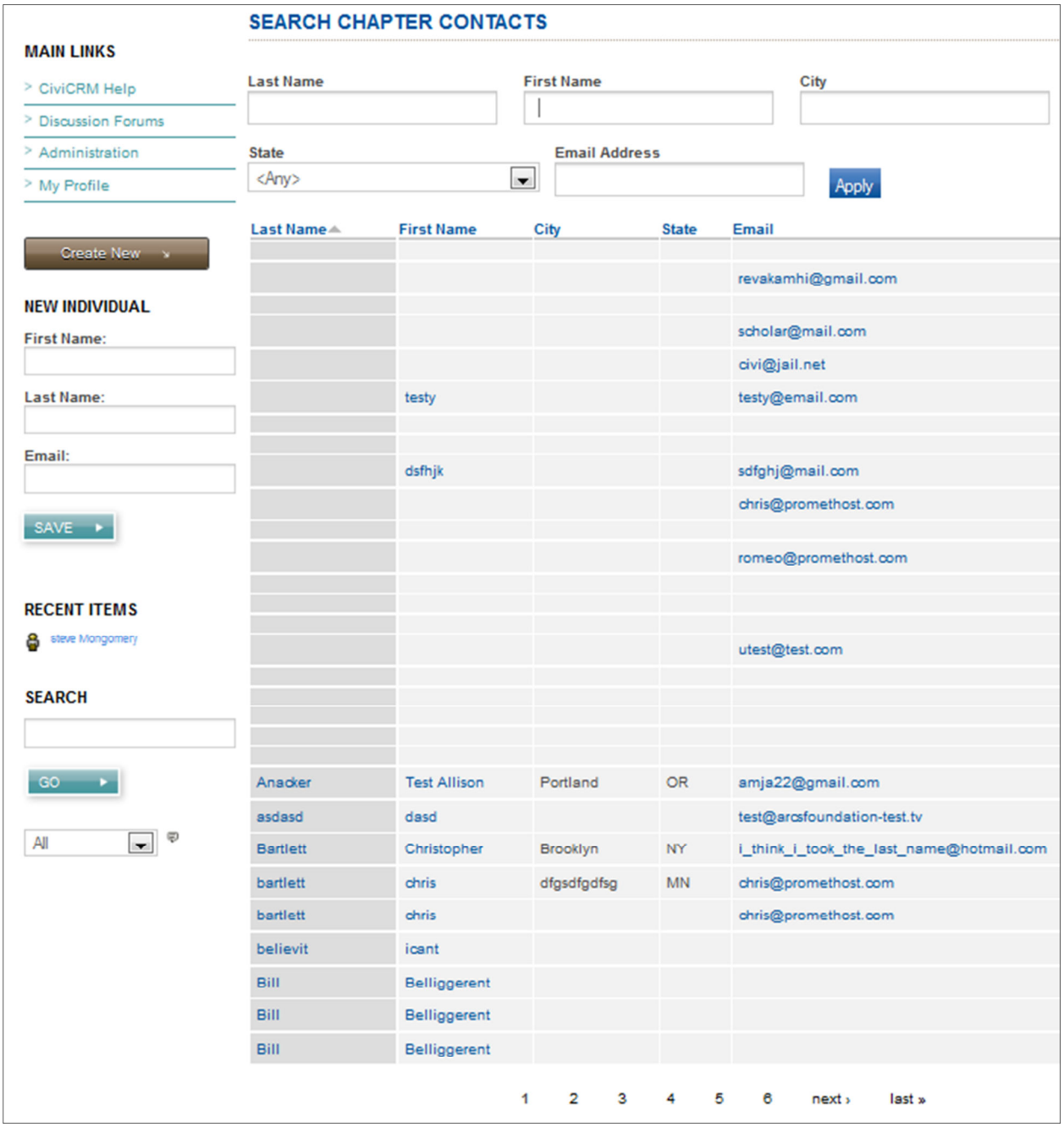
Below is the window that appears after clicking **Add From Email Address** above. Include double-quotes (") around the name and angle-brackets (< >) around the email address. EXAMPLE: *"Client Services" <clientservices@example.org>.* The description box is for optional personal use and the weight box (required) identifies the importance of the new address. (Default =1, next important=2, etc.)


New From Email Address Option
Save
Cancel
FROM Email Address
Include double-quotes (") around the name and angle-brackets (< >) around the email address.
EXAMPLE: "Client Services" <clientservices@example.org>
Description
Font
Size
Source
Weight *
3
Enabled?
Default Option?
Save
Cancel

Reporting

Search Chapter Contacts

This allows you to search all the contacts associated with your chapter. Use as many or as few filters as you'd like to narrow results.

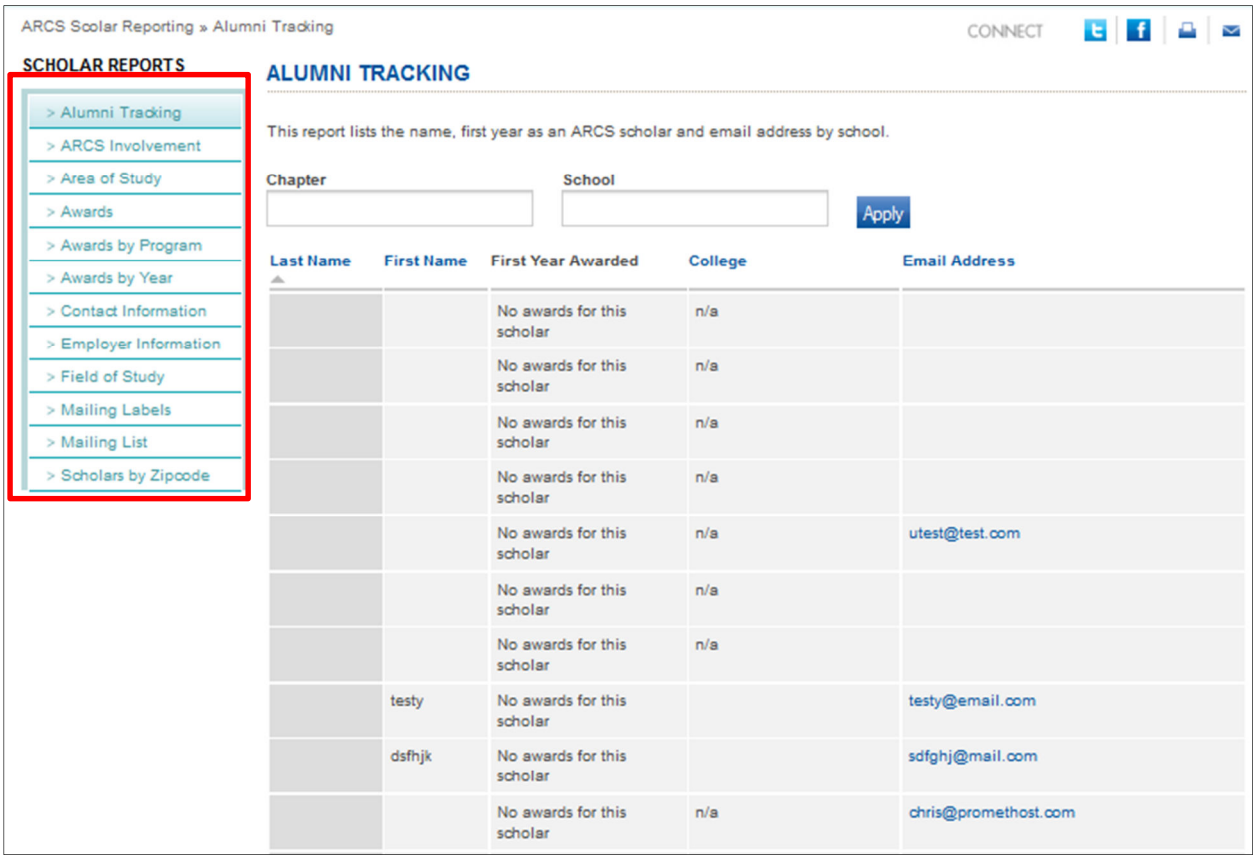


Chapter Roster

The chapter roster lists the members of your chapter by first and last name, city, state, and email. The list can be sorted by alphabetical (or reverse alphabetical order) in any of the columns below. You can export the chapter roster to an excel or document format by pushing the orange **XLS** and **DOC** buttons at the bottom of the list.

ARCS Scholar Reporting

This page was created to run various ARCS reports in a simple and streamlined process. Select the report you'd like to run from the red box below. Reports can be filtered by easy-to-use filters such as **Chapter** and **School**. You can export the chapter roster to an excel or document format by pushing the orange **XLS** and **DOC** buttons at the bottom of the list.



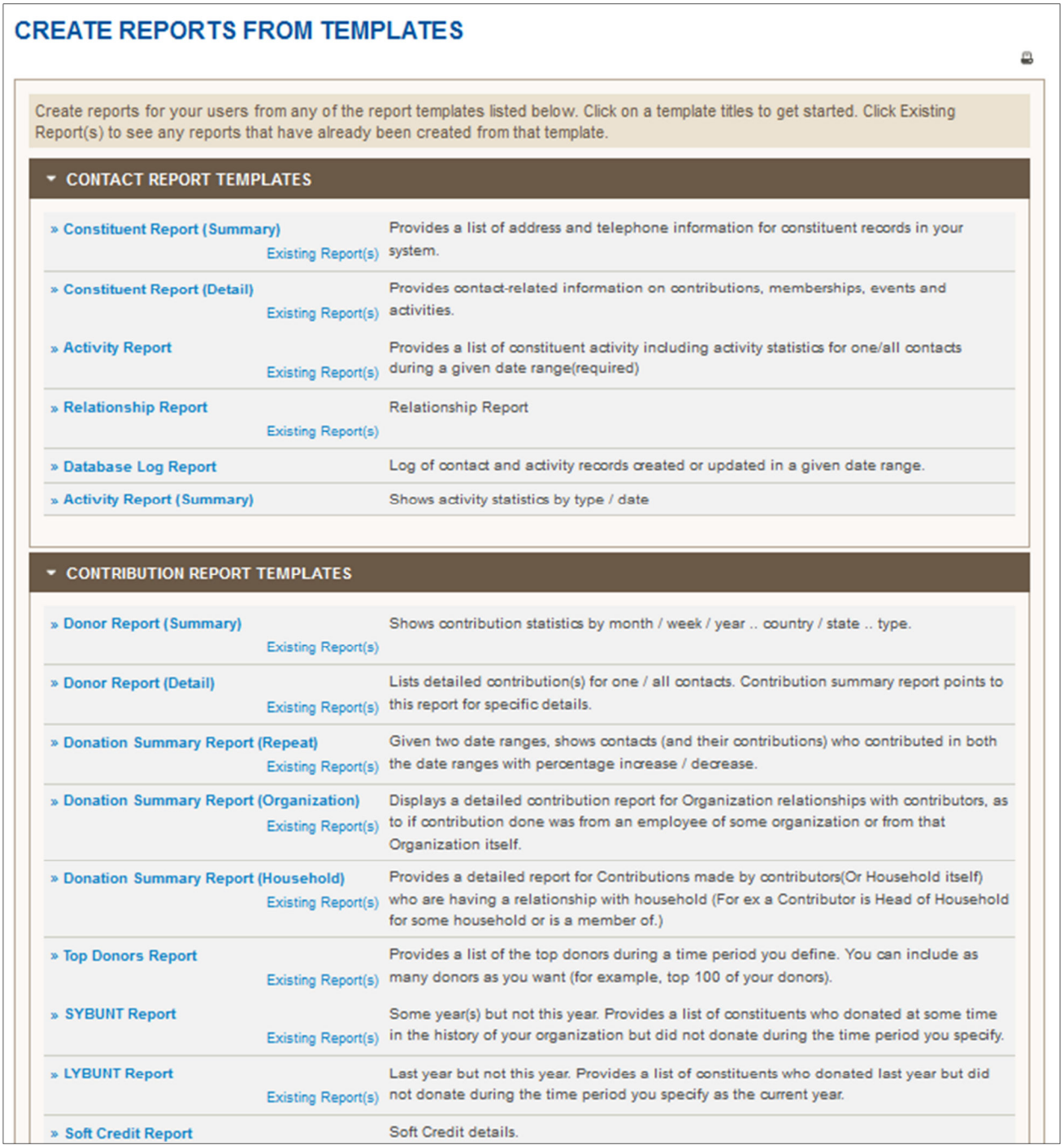
All ARCS Roster

The all ARCS Roster is the same as the Chapter Roster (see above) but includes all ARCS members.

Create a New Report

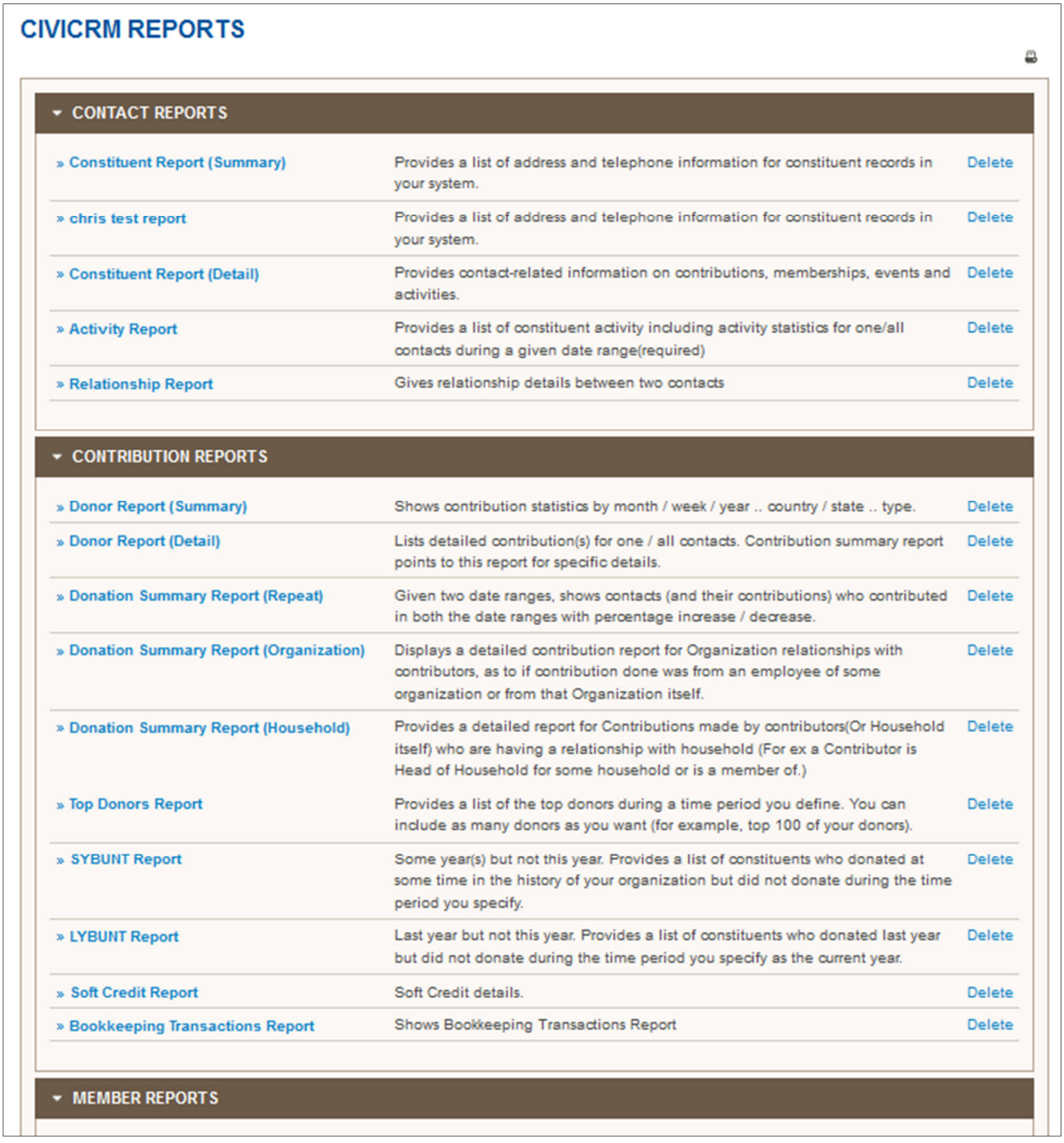
There are between 30 and 40 different types of reports that can be generated and numerous filters and specifications that can be edited within each report template. A brief description is provided so the user can select the report that will generate the sought-after data. If reports have been previously created using a template there will be an **Existing Report(s)** link next to the template link and it will show a list of past reports. Each report is slightly different, some have many filters, some have very few. For instructions on how to create reports with these templates and apply filters to your reports, reference the Donation Summary section of this document (two sections above this).

You can save reports created from templates that you will use often. You can also add custom reports to your CiviCRM Dashboard as a dashlet.



Run an Existing Report

Reports that have been created from the templates will populate in this section. Running an existing report will allow the user to use specifications from a report that already has filters set. Clicking on one of the report links will immediately generate a report. After the report is generated, the user has the option to retroactively change some of the filters or report settings. The reports can be accessed on the page below



CIVICRM REPORTS

CONTACT REPORTS

» Constituent Report (Summary)	Provides a list of address and telephone information for constituent records in your system.	Delete
» chris test report	Provides a list of address and telephone information for constituent records in your system.	Delete
» Constituent Report (Detail)	Provides contact-related information on contributions, memberships, events and activities.	Delete
» Activity Report	Provides a list of constituent activity including activity statistics for one/all contacts during a given date range(required)	Delete
» Relationship Report	Gives relationship details between two contacts	Delete

CONTRIBUTION REPORTS

» Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	Delete
» Donor Report (Detail)	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.	Delete
» Donation Summary Report (Repeat)	Given two date ranges, shows contacts (and their contributions) who contributed in both the date ranges with percentage increase / decrease.	Delete
» Donation Summary Report (Organization)	Displays a detailed contribution report for Organization relationships with contributors, as to if contribution done was from an employee of some organization or from that Organization itself.	Delete
» Donation Summary Report (Household)	Provides a detailed report for Contributions made by contributors(Or Household itself) who are having a relationship with household (For ex a Contributor is Head of Household for some household or is a member of.)	Delete
» Top Donors Report	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	Delete
» SYBUNT Report	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	Delete
» LYBUNT Report	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	Delete
» Soft Credit Report	Soft Credit details.	Delete
» Bookkeeping Transactions Report	Shows Bookkeeping Transactions Report	Delete

MEMBER REPORTS

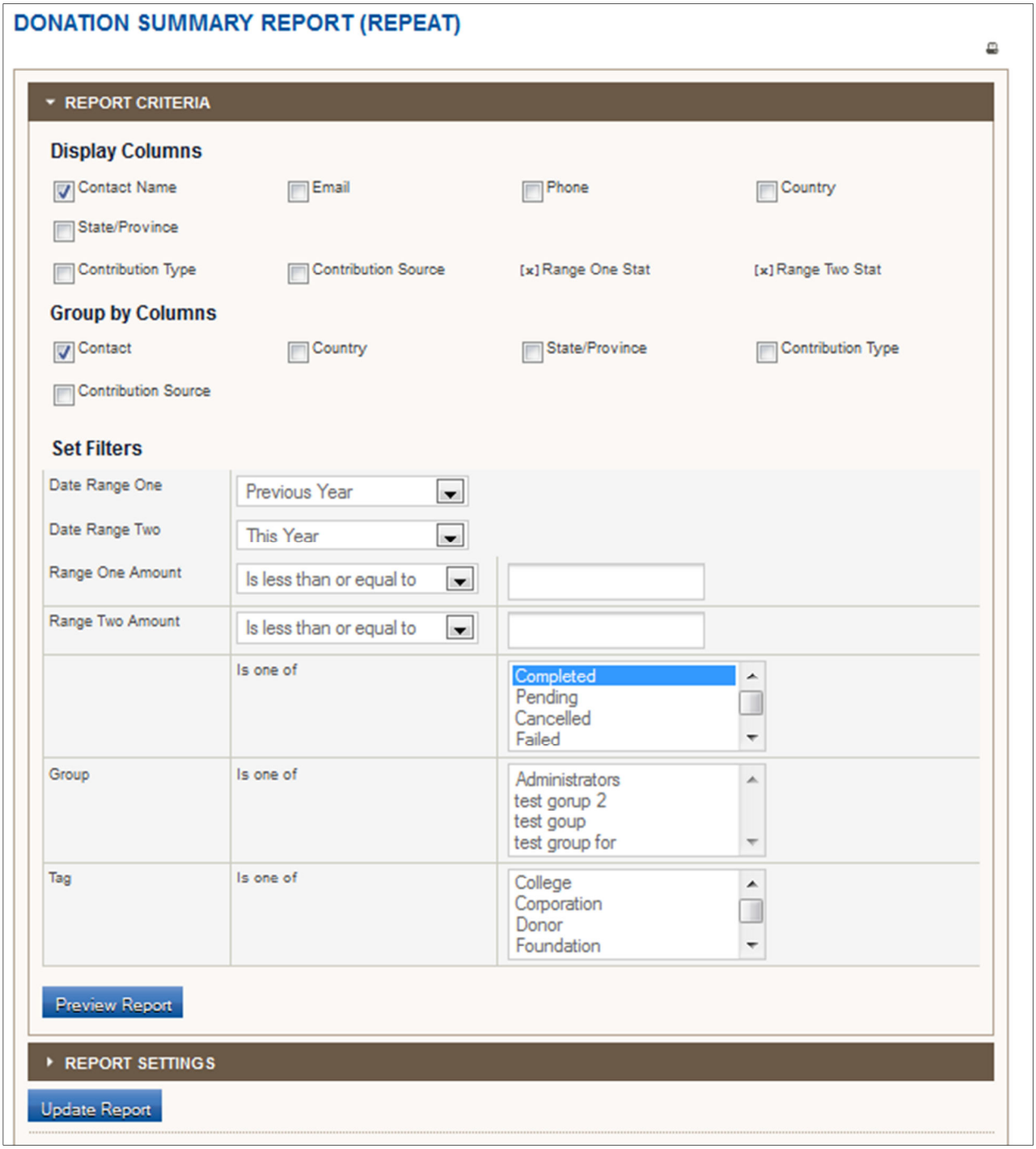
Examples of How to Use and Read Reports

Donation Summary

To generate the Donation Summary Report, first set the report criteria and filters so you the report will contain the information you're looking to pull from the CiviCRM database. Using the filters allows the you to indicate contributions from a specific time period or contributions between certain amounts. No

filters are required to generate a report. You can choose the columns that you want to appear as well as how you want the information grouped.

Once you preview the report, you can go back and update the criteria as many times you need until the report is satisfactory.

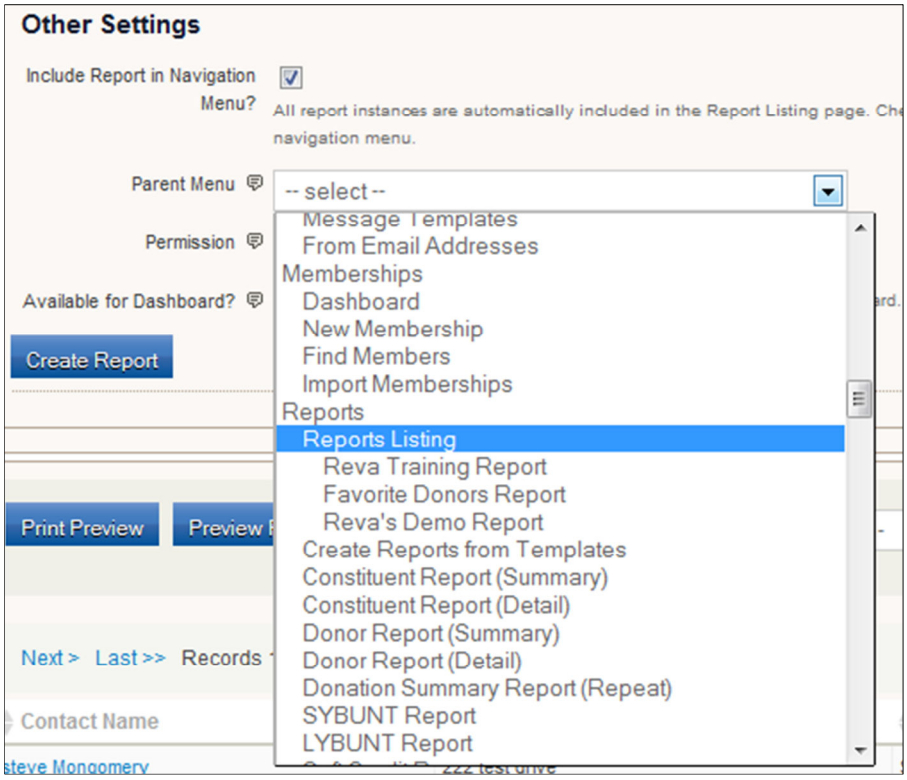


Report functionality can be expanded in the Report Settings window. The **Report Title** and the **Report Description** below will be displayed to users in the reports list when they click the 'CiviReport' menu. The title should reflect the report's default criteria. EXAMPLE: Donation Summary - Current Year-to-date.

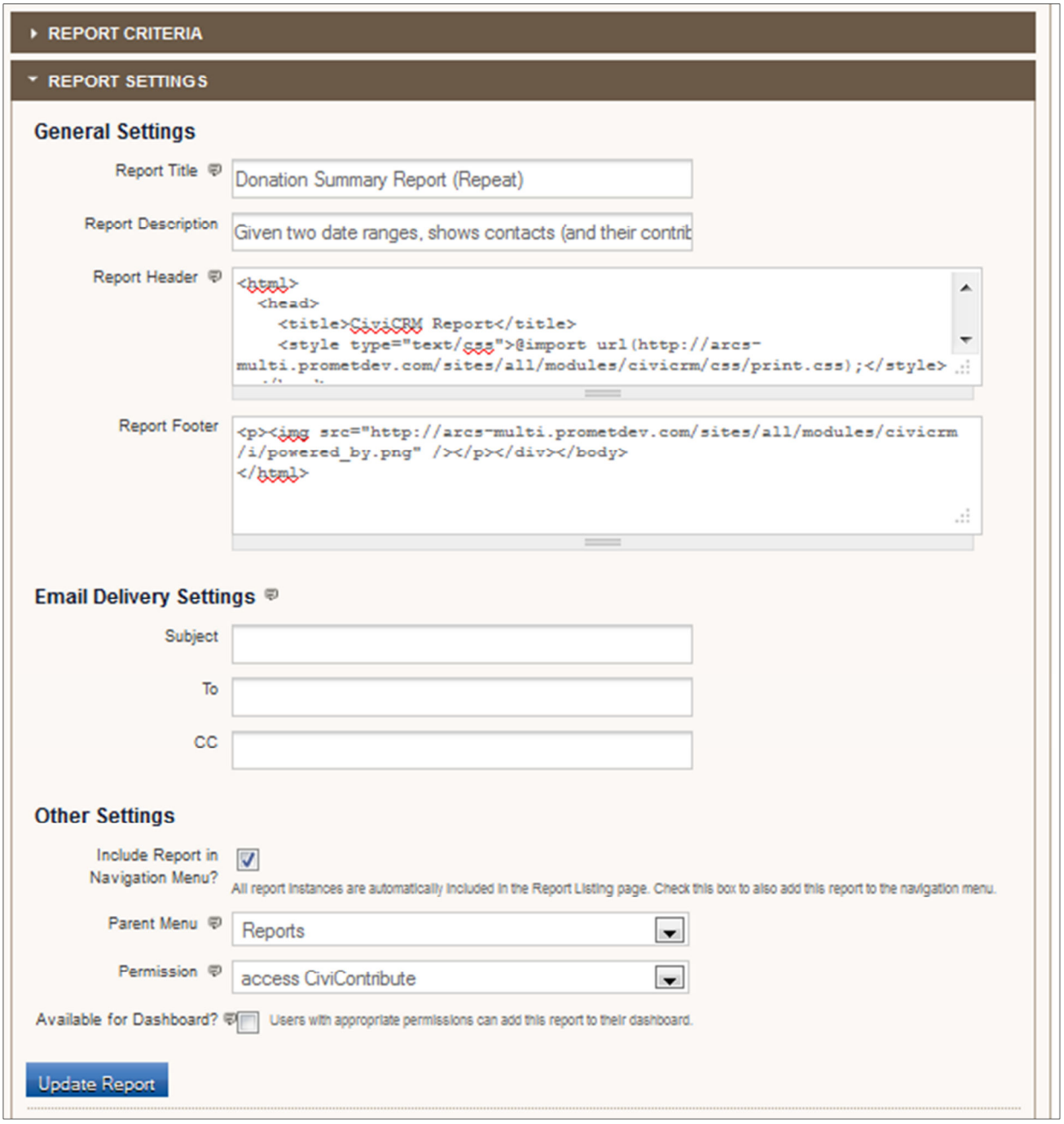
The **Report Header** contains HTML code that will be output at the beginning of the document whenever this report is printed or downloaded in PDF format. The report header is automatically generated and it is recommended that you do not alter this or the **Report Footer** field. You do not need to make any changes to the Report Header or Footer.

A copy of this report can be automatically generated and delivered via email to specified recipients. Use the settings in the Email Deliver Settings to control **Subject** of the email containing the report, as well as the recipient list (**To** and **Cc** fields). Multiple email addresses should be separated by commas.

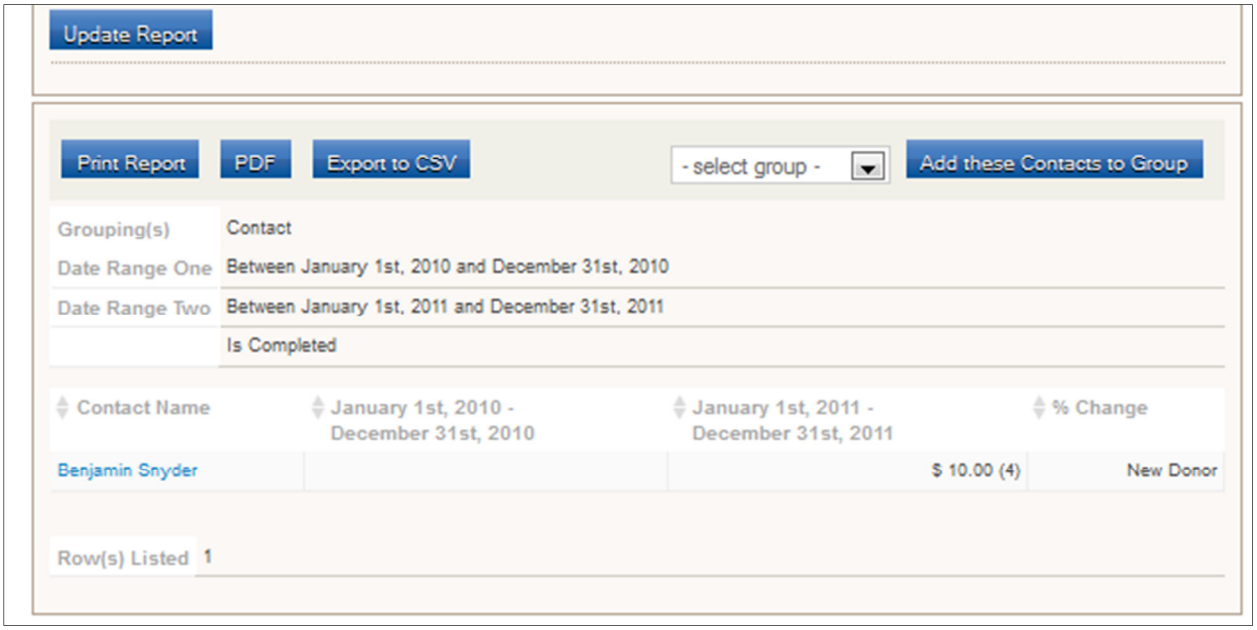
If you choose to **Include Report in Navigation Menu,** select the **Parent Menu** item corresponding to the section this item should be placed in. You should always add your report to the following item: Reports >> Reports Listing.



Please leave the **Permission** as is, these have been preconfigured. You can also prevent users from modifying the default report criteria and filters for reports by NOT giving them *access Report Criteria* permission. Those users will be able to run the report - but only with the criteria and filters that you've established for them.

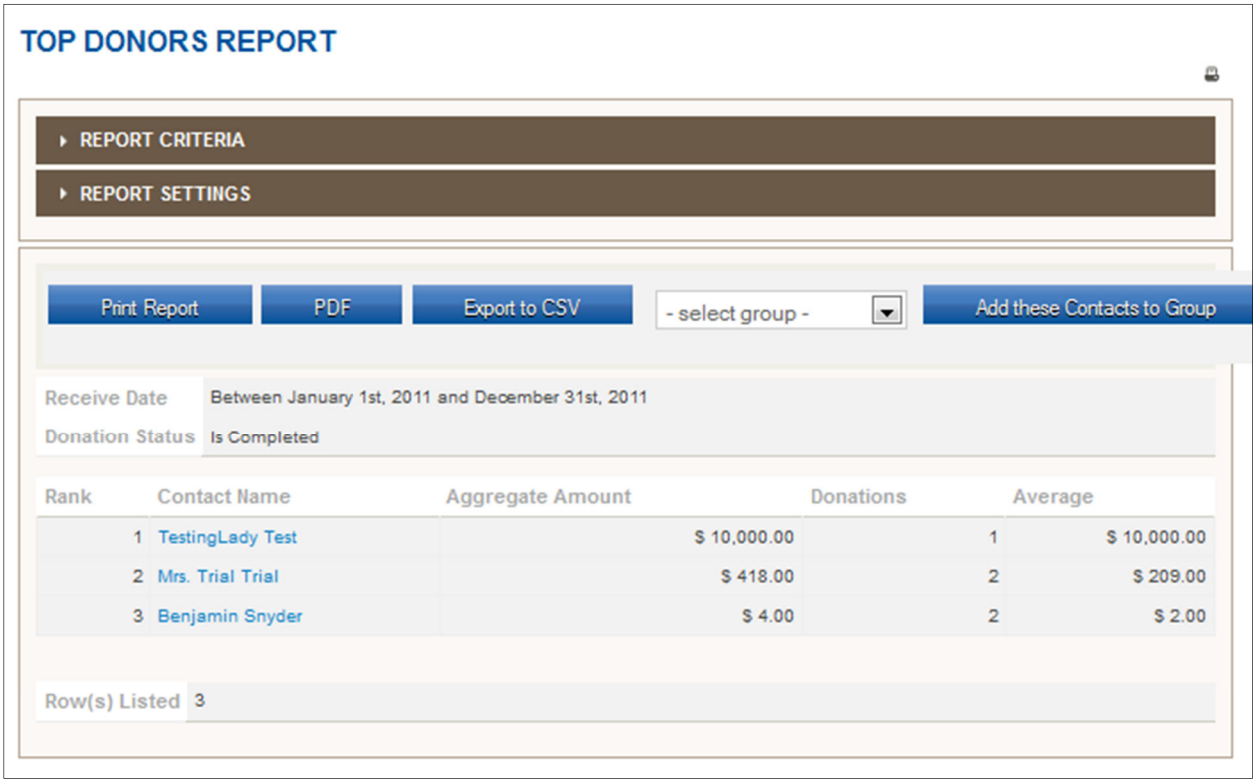


The final section of the Donation Summary Report page is the preview. The user can **Print Report**, generate a **PDF**, or **Export to CSV**. Contacts are listed and links are available (see Benjamin Snyder below)



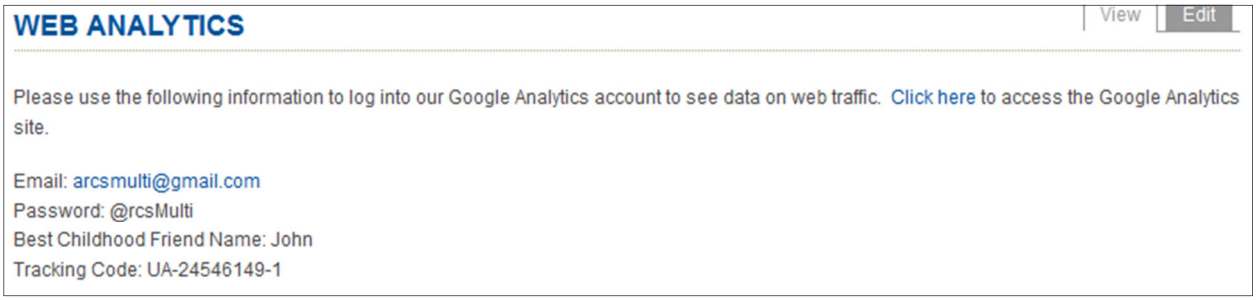
Top Donor Report

The Top Donor Report is created the same way as the Donation Summary Report. The only difference is that there are no display columns to select in this report since it is strictly reporting the top donors. If you have questions, see the instructions directly above under Donation Summary.



Web Analytics

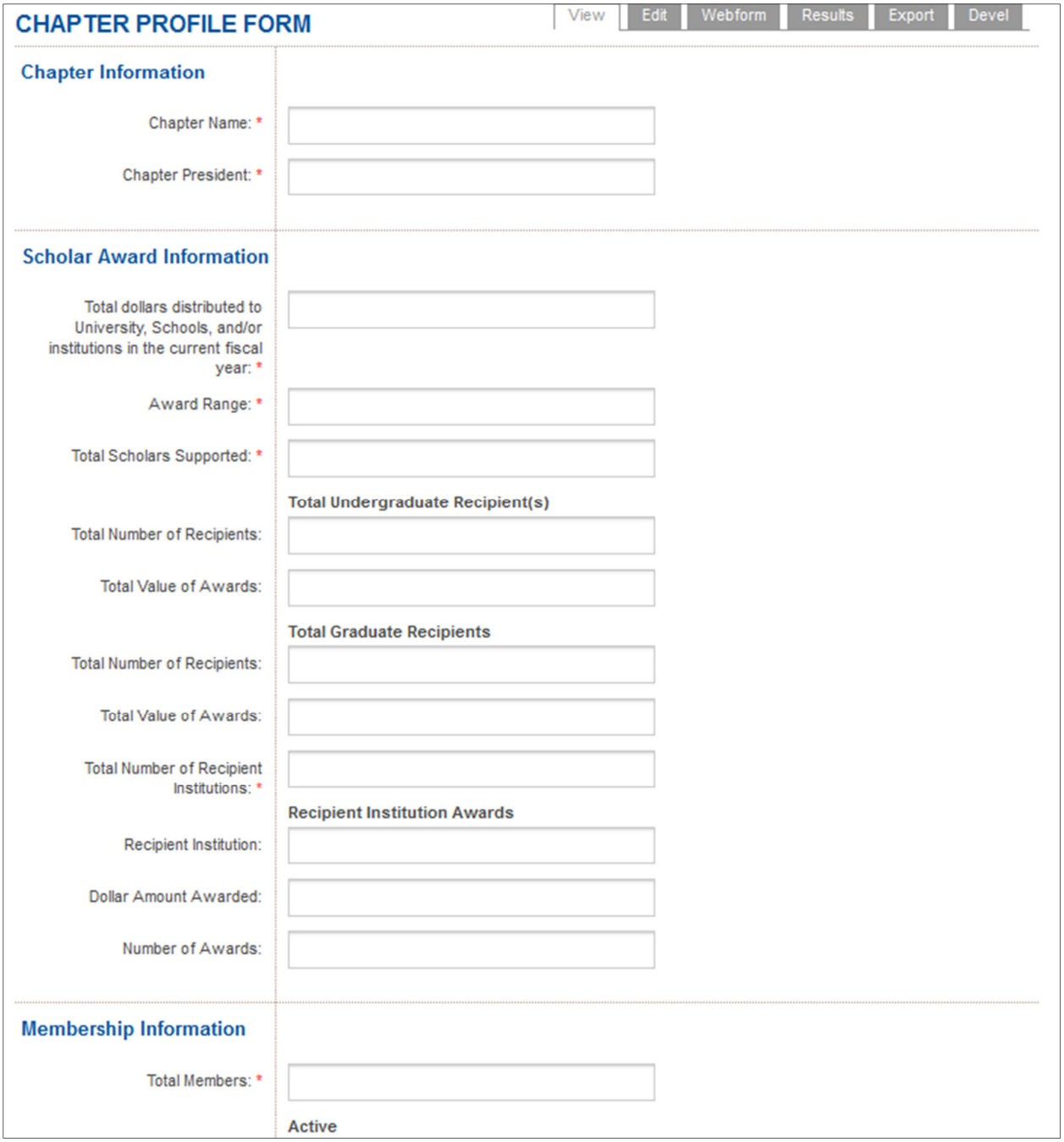
Web analytics directs you to Google where you can view web traffic and site details.



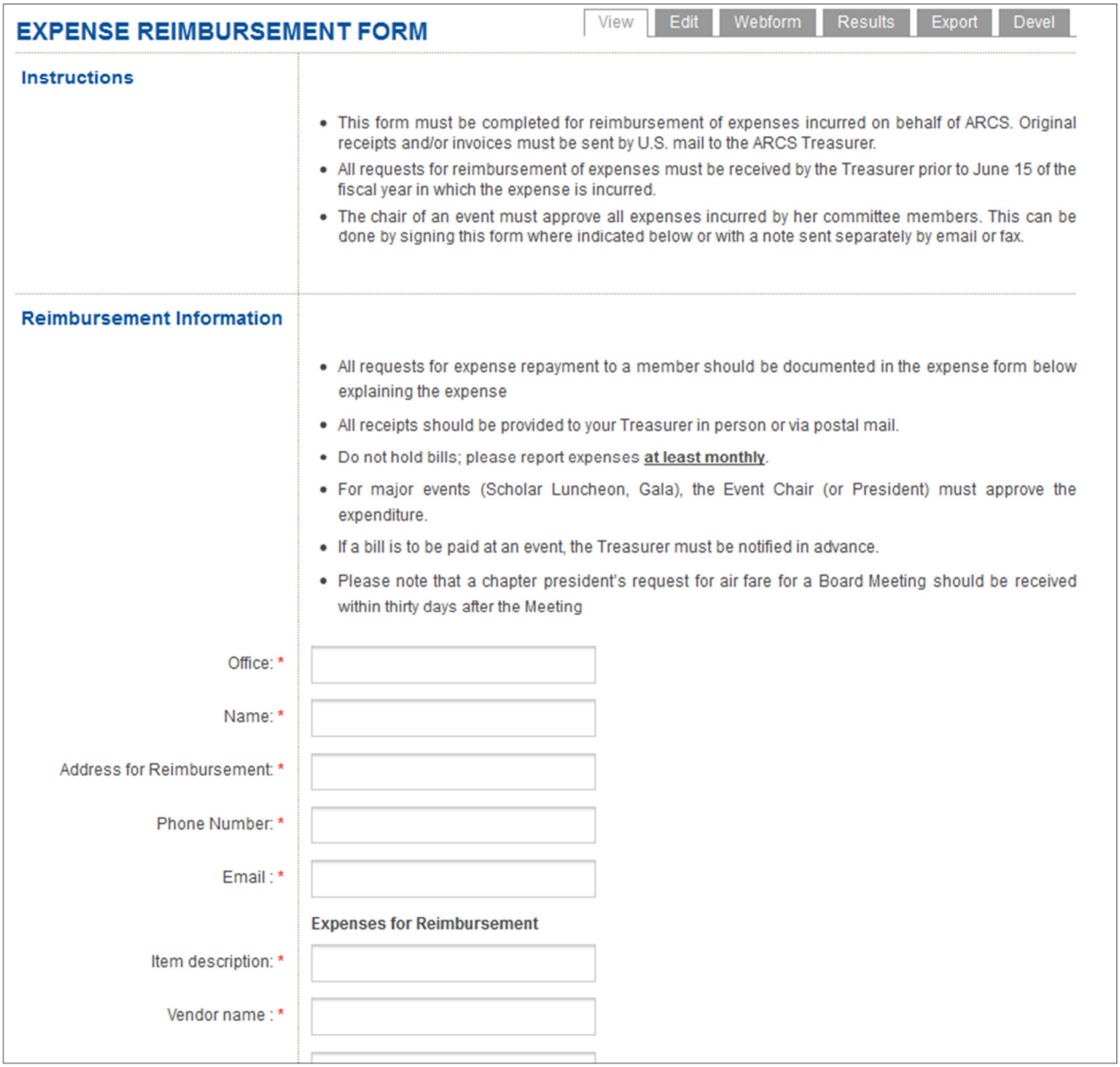
Online Forms

These are online versions of frequently used ARCS forms. They can be filled out online and will be automatically sent to the correct recipient over email. Anything marked with a red asterisk is required. Clicking on the “add more” link will allow you to enter more lines in that category.

Chapter Profile Form



Expense Reimbursement Form



EXPENSE REIMBURSEMENT FORM

View | Edit | Webform | Results | Export | Devel

Instructions

- This form must be completed for reimbursement of expenses incurred on behalf of ARCS. Original receipts and/or invoices must be sent by U.S. mail to the ARCS Treasurer.
- All requests for reimbursement of expenses must be received by the Treasurer prior to June 15 of the fiscal year in which the expense is incurred.
- The chair of an event must approve all expenses incurred by her committee members. This can be done by signing this form where indicated below or with a note sent separately by email or fax.

Reimbursement Information

- All requests for expense repayment to a member should be documented in the expense form below explaining the expense
- All receipts should be provided to your Treasurer in person or via postal mail.
- Do not hold bills; please report expenses **at least monthly**.
- For major events (Scholar Luncheon, Gala), the Event Chair (or President) must approve the expenditure.
- If a bill is to be paid at an event, the Treasurer must be notified in advance.
- Please note that a chapter president's request for air fare for a Board Meeting should be received within thirty days after the Meeting

Office: *

Name: *

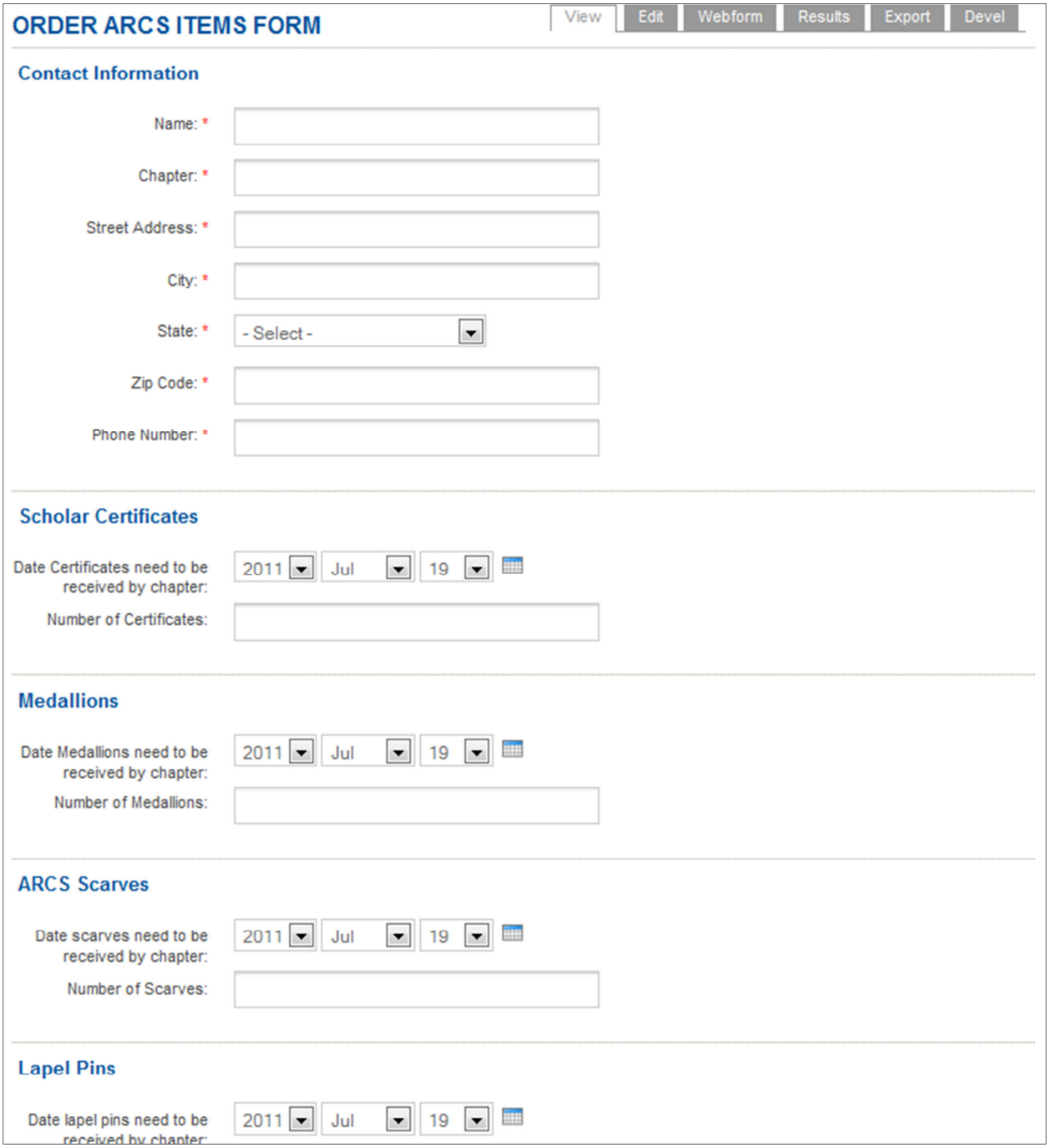
Address for Reimbursement: *

Phone Number: *

Email : *

Expenses for Reimbursement

Item description: *

Vendor name : *

Order ARCS Items