# SWNG Committee Manual

## OVERVIEW

This manual is intended to provide a simple guide to common Committee activities on the Southwest Network Groups website.

Note: your committee login is the same as your normal member login. As a committee member your access will be upgraded to give you extra access. If you can't find a page mentioned below your access might not of been upgraded yet.

Please remember with your extra access comes more responsibility and all the changes you make are logged for reference.

## SECTIONS

# Adding A New Member

Only administrators and committee members may add new users to the system. There are several tasks that need to be performed before all of the sites functionality will be functional for a new member. We will run through them below.

**Adding a User**

Once you have logged into the site, you will need to access the dashboard to add a new user. If you have sufficient privileges, you will see a thin black menu above the website. You can access the dashboard by clicking on the **South West Networking Group** link. (You can also skip straight to the next part by hovering over the **+ New** button and selecting the **User** options. This tip applies to multiple actions where you will be adding an event, referral, user, etc.) Once you are in the dashboard you will see the following screen.
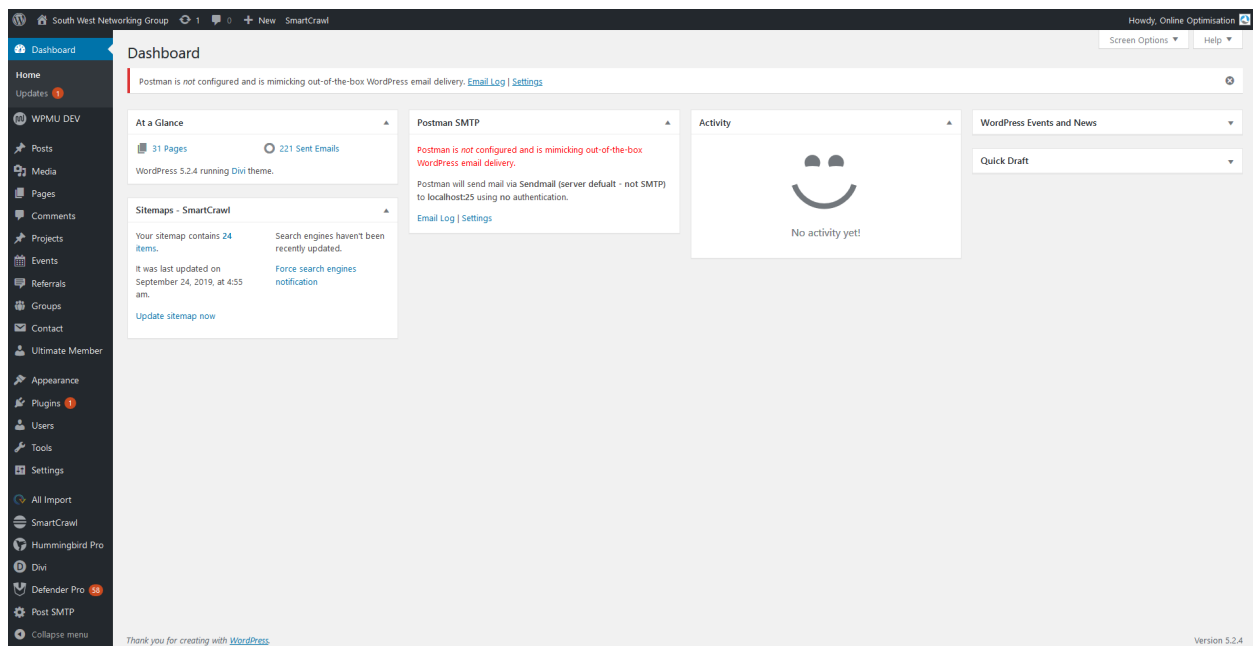


On the left hand side, you will find the **Users** menu. Clicking on this will take you to the users screen, where you can add, edit and delete users from the system. At the top left is the button to **Add New** users. You can also filter the visible users, and sort them by clicking on the column name you want to sort if it is highlighted blue.

The users screen is shown in the image on the next page.
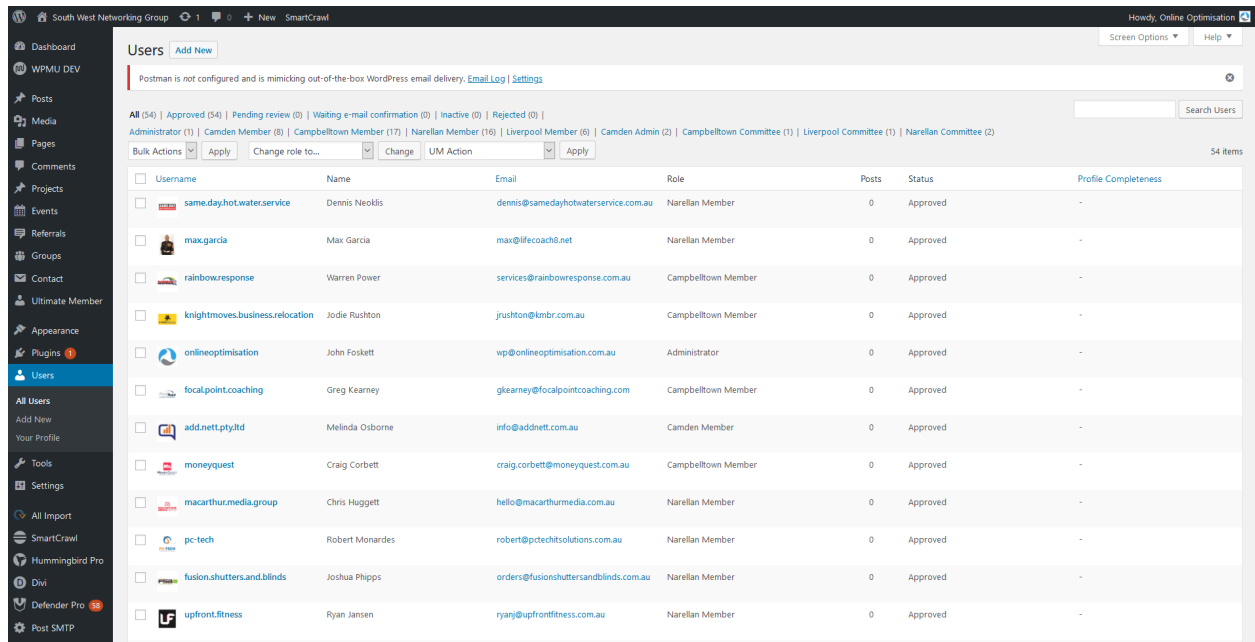
Once you click **Add New** you will be taken to a form. Fill out the details and the user will be created. As part of the process, you can send them an email with the details needed to login.

Make sure to select the correct Role. These are separated by chapter and access level, eg Narellan Member. If you select one of the custom SWNG Roles, the Ultimate Member Role select will disappear.

On the Users page, you can approve the member if they are not already approved by ticking the checkbox next to the member(s) and selecting **Approve Membership** from the **UM Action** dropdown (pictured on the right in the detail image below).
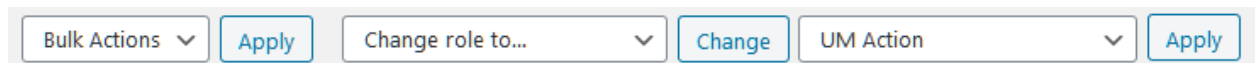




A member also needs to be added to a group for such functionality as attendance tracking etc. On the left hand menu of the dash you will see the **Groups** section. Once you click on the section you will see all the groups listed. Find the corresponding group (it should match the Chapter of

the member, which you just selected in the previous step.) and you can add a member by hovering over the Group name and clicking the **Edit** text link that appears (shown below, at left of image).
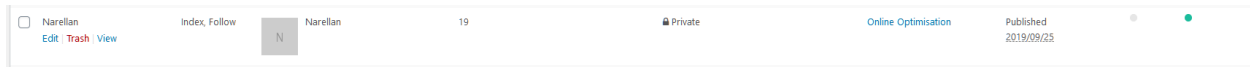


On the group page scroll down to the bottom of the page till you see the sections titled **Add New Members** and **Manage Members**.
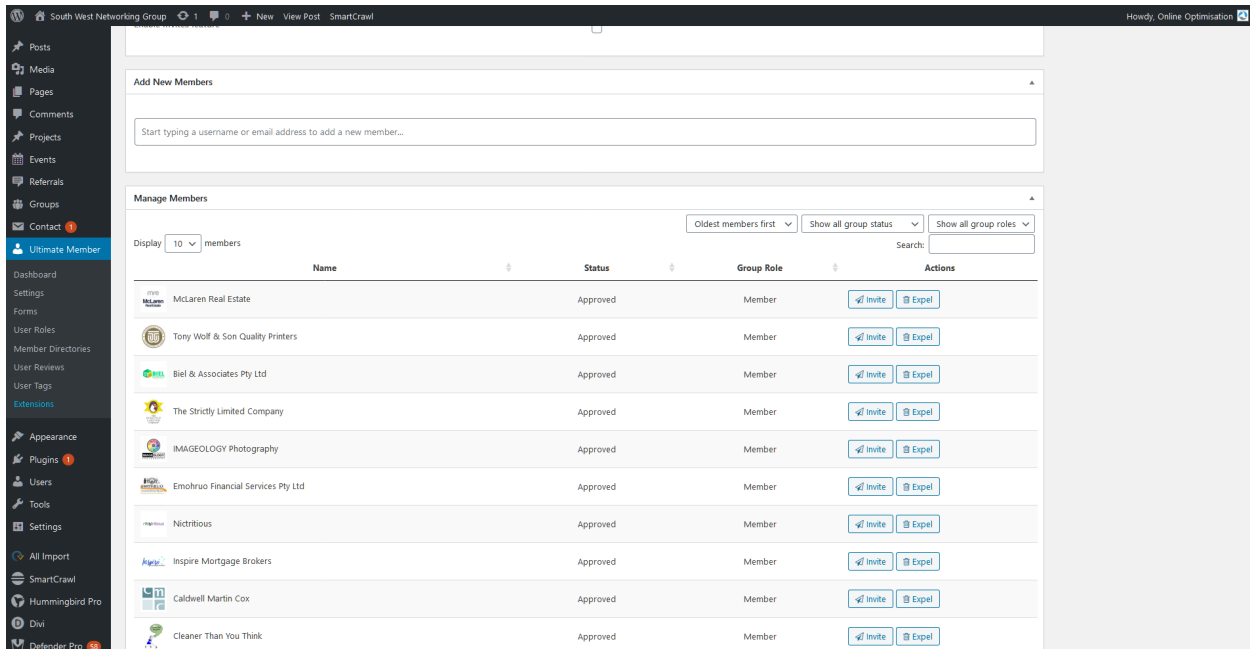


To add the member simply start typing their username or email address in and they should show up in the list. The list will autofill any matches as shown below.
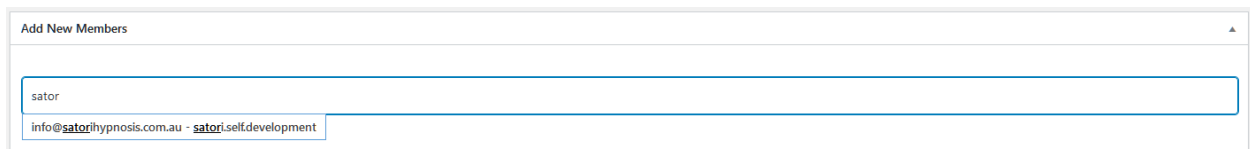


Once you click on a  match you will see the member show up with their username and profile image (will possibly be blank if they were just added). Click the **Add Member** button and the member will now show up in the attendance lists when they are populated for events.
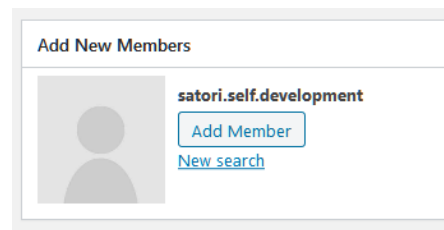
# Adding Admin & Committee Access

If a member wasn't set up as an Admin or Committee member on creation, increased access can be granted by anyone with the privileges to do so (site or chapter admins). To do so, log in to the dashboard, and select the **Users** option from the left hand menu. You will see the users screen shown below.
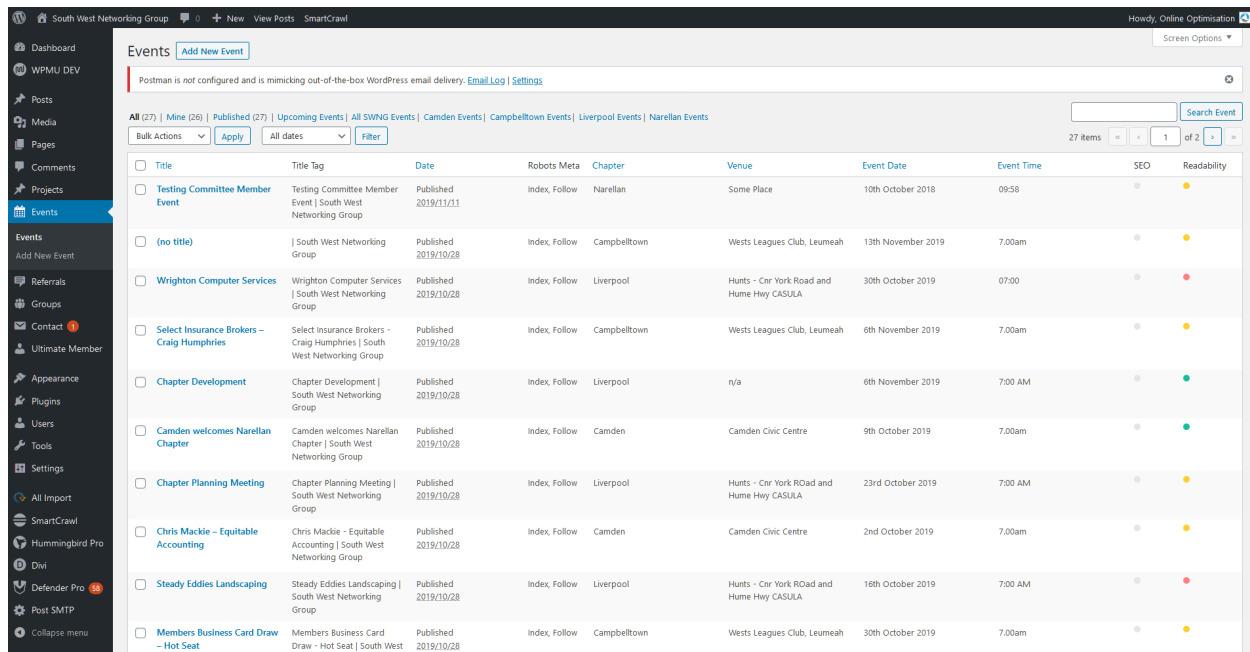


You can narrow down the visible users by selecting a subset, for example if you want to upgrade access to one or more Camden members, you can click the blue **Camden Member** link above the users. Select the member(s) you wish to change the role of by clicking the checkbox on the left of their username, then selecting the desired role from the **Change role to...** dropdown and finally clicking the **Change** button.

# Adding & Editing Events

To add or edit an event, log in to the dashboard, and select **Events** from the left hand menu. You will be taken to the Events screen where all events will be listed along with some useful properties. All columns with blue heading text can be sorted. And select subsets can be shown by clicking the filter links above the table.



To add a new event, click the **Add New Event** button at the top left. You be taken to the Event editor. Below is a labeled diagram of the page. The following list breaks down the sections.

1. **Title Section:** This is where you enter the name of the event.
2. **Content Section:** This is where you can enter more detail for the event, typically a short description of what members can expect at the event.
3. **Event Details:** This is where you enter all of the important details about the event, such as time, date, location and chapter.
4. **Attendance Section:** This is where the attendance will be tracked. The list will not show until a chapter is selected, as the list will pull the members of the specified chapter. **NOTE: that changing the chapter after the list is entered/edited will replace it with a clean list.** Attendance lists are populated with all members in attendance as the default. This is to save work by only having to mark absent or excused members.
   Guests are separate from members and can be added by Typing their names in the **Guests** input field and clicking the

+ **Guest** button. Once added guests can be removed by clicking the **Remove** button (pictured).

5. **Publish Section:** This section allows you to publish/update the event. If an event is incomplete and not ready to publish live, you may click the **Save Draft** button. (The full section is shown to the right).
Once you are ready you can click the **Publish** button. If you come back later the button will be changed to an **Update** button, which will update any details you changed. **PLEASE NOTE: Attendance is updated instantly, you do not need to Update before the changes will be recorded in the system.**
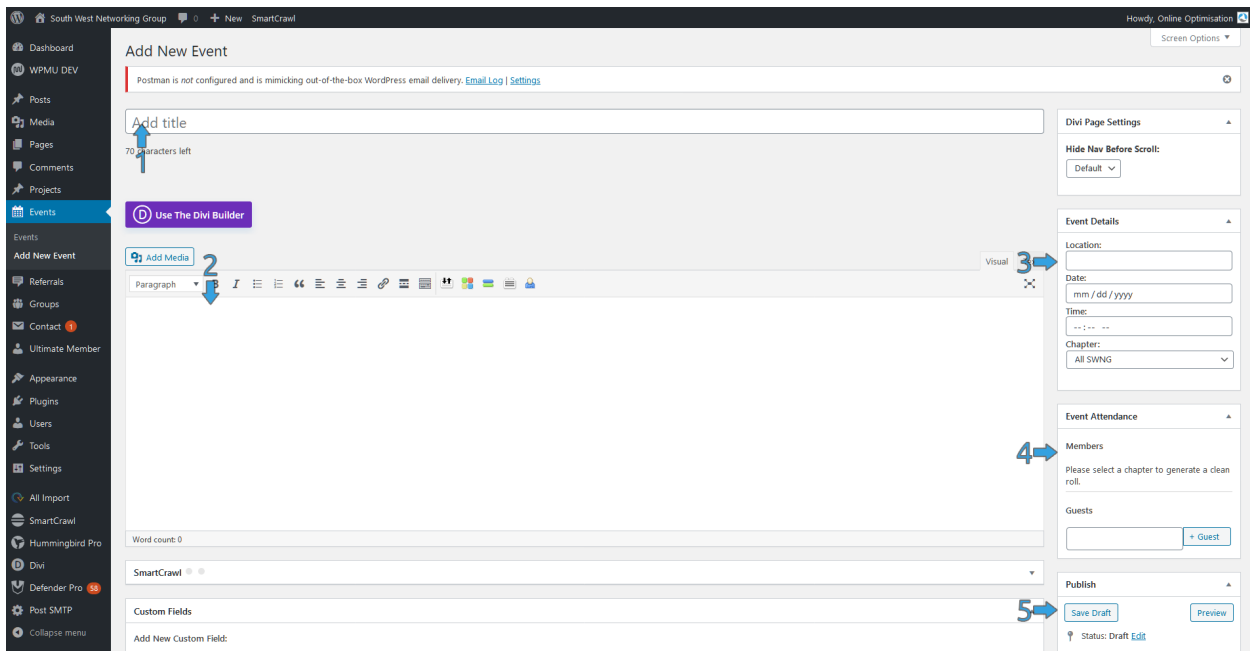




Editing a post is much the same as creating one, although you will instead of clicking **Add New Event**, you will click on its title in the Events page (left hand side).

## Updating Attendance

Attendance is kept separately for each event. To update attendance, log in to the dashboard, click on the **Events** option on the left hand menu, and then click on the event you wish to update. Once a chapter has been selected (on Event creation) an attendance list will be created and stored in the system. It will be located on the right on desktops/laptops, or towards the bottom on smaller devices. The section is shown on the right.

To update a member, simply click on the appropriate status. Lists default all members to present on creation, since it is likely that there will be more present members than absent or excused members, this should make attendance less tedious.

Attending guests can also be added at the bottom of the section simply by typing in their name and clicking **+ Guest**. Guests can likewise be removed once added by clicking the **Remove** button next to their name.

Please note all changes in this section are instant and do not require the event to be updated to be saved.

| Event Attendance | ▲ |
|---|---|

**Members**

Biel & Associates Pty Ltd

| Present | Explained | Absent |
|---|---|---|

Emohruo Financial Services Pty Ltd

| Present | Explained | Absent |
|---|---|---|

IMAGEOLOGY Photography

| Present | Explained | Absent |
|---|---|---|

Inspire Mortgage Brokers

| Present | Explained | Absent |
|---|---|---|

McLaren Real Estate

| Present | Explained | Absent |
|---|---|---|

Nictritious

| Present | Explained | Absent |
|---|---|---|

The Strictly Limited Company

| Present | Explained | Absent |
|---|---|---|

Tony Wolf & Son Quality Printers

| Present | Explained | Absent |
|---|---|---|

**Guests**

| | + Guest |
|---|---|

Test Guest | Remove