

Relay Online How To: Power in Purple Customization Guide

Included in this guide you will find all the steps you need to fully customize your Power in Purple site!

This is to be used as a quick reference customization guide. If you would like additional details, or more information on the management of your event, please visit http://rrelayforlife.org/EMCSupport for the comprehensive EMC Manual.

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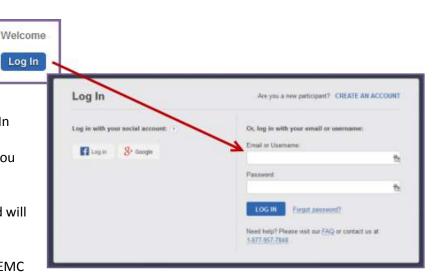


Logging In

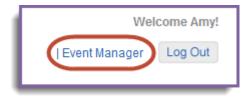
Access your site by following the URL provided in your EMC access notification email.

At the top of the page, click the blue Log In button. In the window that opens, enter your username and password. (Note: It will be the same for all events you manage)

- **Existing ACS Staff:** Your username/password will be the same as it was in prior years.
- New Staff/Volunteers: See <u>Appendix A</u> for EMC access instructions.



Once you have logged in, select the "Event Manager" link that appears.



CONGRATULATIONS! You are now logged in to your Event Management Center. Please follow each of the following steps as written to get your site ready for fundraising as soon as possible.

Event Center Customization

We have completed the as much of the basic customization as we could for you, though you will want to verify and confirm the details we have pre-customized for you based on the information outline below. If you have already confirmed the event details, you can skip to the <u>Event Web Site Customization</u> steps!

A. Event Center > Edit Event Options

1. Edit Event Options

- a. Different Event Fundraising Goal: Verify your event goal, update if necessary.
- b. Click 'Next

2. Location Information

- a. Event Location Details: Since this is a virtual event, no Location Details needed
- b. Local Office Mailing Address: Verify that the Local Office Mailing Address is correct. If it is not correct, please see Appendix B for the steps to submit the Event Date Change so it can be updated in all systems.
- c. Click 'Next'

3. Edit Advanced Options

- a. You can skip this step, as Power in Purple events do not scrolling sponsor logos!
- b. Click 'Finish'



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B. Event Center > Edit Event Properties

- a. Event Name: Verify the Event Name is correct. If it is not correct, please see <u>Appendix B</u> for the steps to submit the Event Name Change so it can be updated in all systems.
- b. Schedule: Verify the Event Start Time.
- c. Date & Time: Verify the Event Date. If it is not correct, please see <u>Appendix B</u> for the steps to submit the Event Date Change so it can be updated in all systems.
- d. The reminder of the Event Properties fields can be left blank.
- e. Click Finish

C. Event Center > Edit Event Coordinator Properties

- a. Name: Verify ACS Staff Person name.
- b. Phone: Verify ACS Staff Person phone.
- c. Email: Verify ACS Staff person cancer.org email.
- d. If the ACS Staff Partner information is not correct, please see <u>Appendix B</u> for the steps to submit the Event Coordinator Change so it can be updated in all systems.
- e. Click 'Finish'

D. Event Center > Manage Event Library

a. Check out the <u>Event Web Site Customization</u> steps for more information on uploading Candidate images to your Event Library, and inserting them into your Greeting Page!

Event Web Site Customization - Greeting Page

Adding Candidate Photos to your Web Site

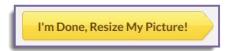
A. Resize your Candidate Photos

Prior to uploading the Candidate photos to your Greeting Page, you will want to resize them to the proper dimensions so they don't distort the page configuration or throw the table out of alignment.

- 1. The photos for your Candidates section should be resized to 240 pixels wide prior to uploading them to the image library you may use any photo editing program you wish!
- 2. Here is an easy web-based photo resizer you can use to get your pictures down to the right pixel width:

http://www.picresize.com/

- a. Simply 'Browse' to select the Candidate photo on your computer and click 'Continue'
- b. Under Step 2, select 'Make My Picture Custom Size' from the dropdown
- c. Enter a width of 240 pixels
- d. There are no height restrictions, so just leave that field blank, and the image will resize to the proper ratio!
- e. Scroll down and click 'I'm Done, Resize My Picture'





f. You will be presented with a few options for saving, simply click **Save to Disk** and you can save the resized image to your PC.



B. Upload Candidate Photos to Image Library

The next step in the process is to upload the photos to the Image Library in the EMC of your Power in Purple event, so that you can add them to your website.

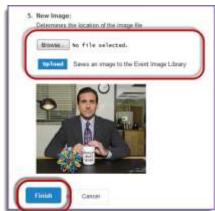
- 1. Start by logging into the EMC
- 2. Under the **Event Center** tab, click 'Manage Event Library' and select the 'Image List' tab
- 3. Then, at the top of the page, click **Upload New Image**.
- 4. Specify the following about your Candidate image:
 - a. Image Title Identifies the image file in the Event Library and is the name that displays in the image list, we recommend including the Candidate name in the title, so you can easily identify which is which in your image list.
 - b. Locate the image on your computer by clicking 'Browse' and select the image you wish to upload.
 - c. Click 'Upload' Once your image has completed uploading it will appear at the bottom of the page
 - d. Click Finish

C. Accessing the Greeting Page

- From the Event Manager Center, click Event Web Site in the top navigation bar
- Select the Greeting Page from the Choose a page to edit drop-down menu.
- 3. Click on the blue Edit button to open the Greeting Page for editing.









**Please note, as we proceed with Greeting Page customization, please do not edit modify or delete any content found in [[double brackets]] or gray shaded boxes as those contain critical coding that will allow your site to display and function correctly.

D. Adding Candidate Photos to the Greeting Page

1. Once the WYSIWYG (What You See Is What You Get) window appears, you will see that a table has been built into the Greeting Page, where you can easily drop the Candidate photos into the appropriate cells.



- From the WYSIWYG of the Greeting Page, place your cursor in the cell where you want to insert the image.
- 3. You will see a default image has been added on your behalf, you can simply delete that image to add your own!
- 4. Click the **Image icon** and the Insert/Edit Image dialog box will open.
- 5. Choose the Candidate image you wish to insert from the Image List dropdown.



- a. The image list dropdown will show you a list of all the images you have loaded into your Image Library.
- b. Since your image has been resized prior to uploading, you can leave all the other fields as is!
- c. Click 'Insert'
- 6. Be sure to click **Save** when you are finished editing your page.
- 7. Upon saving your edits, they immediately become live on the Greeting Page, so your Candidate photo will now display!



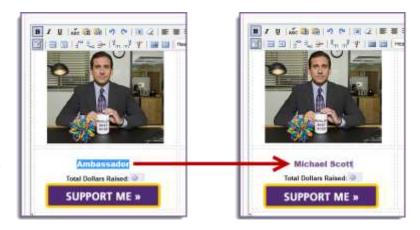
Adding Candidate Names to the Greeting Page

Once you have added the Candidate photo to the Greeting Page, you should also add their name to identify who they are for site visitors and potential donors.

- 1. From the Event Manager Center, click Event Web Site in the top navigation bar
- 2. Select the Greeting Page from the *Choose a page to edit* drop-down menu.
- 3. Click on the blue Edit button to open the Greeting Page for editing.
- 4. Once the WYSIWYG window appears, you will see within each cell that default 'Candidate' text has been added below each image space.



- To update the Candidate's name while keeping the text formatting, highlight the default text, and type the Candidate name directly over the highlighted text.
- 6. Be sure to click **Save** when you are finished editing your page.
- 7. Upon saving your edits, they immediately become live on the Greeting Page, so your Candidate's name will now display!



Linking 'Support Me' Button to Candidate's Personal Pages

Within each Candidate space on your Greeting Page is a 'Support Me' button you can link to the Candidate's personal page! Before doing so, they will need to be registered on your Power in Purple website. Once the Candidate is registered, visit their personal page to copy the URL.

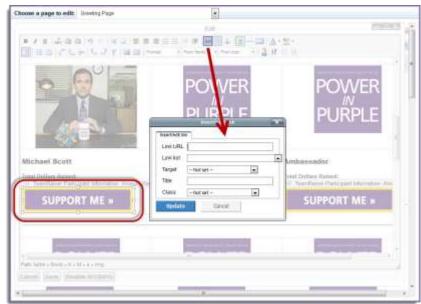
**Please note, we recommend you start a spreadsheet to track the Candidate names and their personal page URLs, as this will come in handy for the next few steps of the process!



- 1. From the Event Manager Center, click Event Web Site in the top navigation bar
- 2. Select the Greeting Page from the Choose a page to edit drop-down menu.
- 3. Click on the blue Edit button to open the Greeting Page for editing.

4. Once the WYSIWYG window appears, you will see the Candidate photos / names that you have added in the previous steps.

5. Click on the 'Support Me' image that you would like to link to the Candidate's respective personal page, then click the **Link icon** and the Insert/Edit Link dialog box will open.





- 6. This is where the list of personal page URLs will come in handy!
 - a. Paste the personal page URL for the respective Candidate into the Link URL field in the in the dialog box.
 - b. Select the Target to 'Open link in the same window'
 - c. All other settings can remain as is
- 7. Click Insert.
- 8. Once you save that page, the Candidate photo will become a link to their personal page.



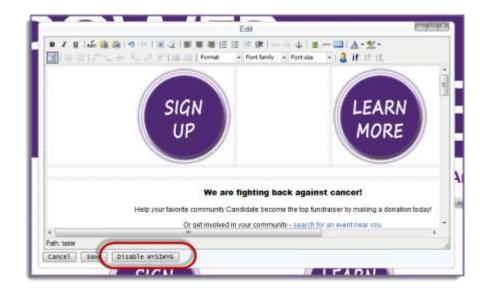
Updating the 'Dollars Raised' Widget for Your Candidates

The 'Dollars Raised' widget will display the total each Candidate has raised directly on the greeting page, under their photo! However, we must first configure the widget to pull the correct participant information.

**Please note, this is the final step of the process for adding each Candidate to your Greeting Page. It is imperative that you take your time with this step, as it requires working within the HTML content of page (which dictates exactly how your page renders to the public). Please review the instructions thoroughly before proceeding, and only touch the parts of the code outlined below.



- 1. From the Event Manager Center, click **Event Web Site** in the top navigation bar
- 2. Select the Greeting Page from the *Choose a page to edit* drop-down menu.
- 3. Click on the blue Edit button to open the Greeting Page for editing.
- 4. Once the WYSIWYG window appears, you will see the Candidate photos / names that you have added in the previous steps.
- 5. Since we are working in the HTML code for this step, click **Disable WYSIWYG**.

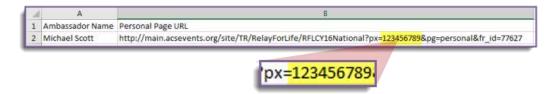




- 6. The HTML Source Editor will open. (As a reminder, please use caution when working within the HTML Source Editor, as this is the code that make your entire Greeting Page display!)
- 7. Carefully scroll down until you see the name of the Candidate whose widget you wish to update.



- 8. Below the Candidate's name within the HTML code, you will see a string of code that looks like this: Total Dollars Raised: <convio:session name="48" param="77627-3144023:dollars">
- 9. You will want to replace the default ID (3144023) within that string of code with the Candidate's personal ID so that the code pulls in the correct information.
- 10. This is where the list of personal page URLs will come in handy!
 - a. Within each personal page URL is a participant ID number (in the URL string, it is the number that follows "px=")
 - b. **COPY** the participant ID from the respective URL (make sure you are copying only the ID, and none of the characters that come before or after it in the URL string)



- 11. Then **PASTE** the Candidate's ID in place of the default ID. The default participant ID is **3144023**. See example below.
 - a. Original Code:

```
48 
49 <h3><strong>Michael Scott<br/>
50 <strong>Total Dollars Raised:</strong> <convio:session name="48" param="77627-3144023:dollars"></convio:session name="48" param="77627-3144023:d
```

b. Updated Code:



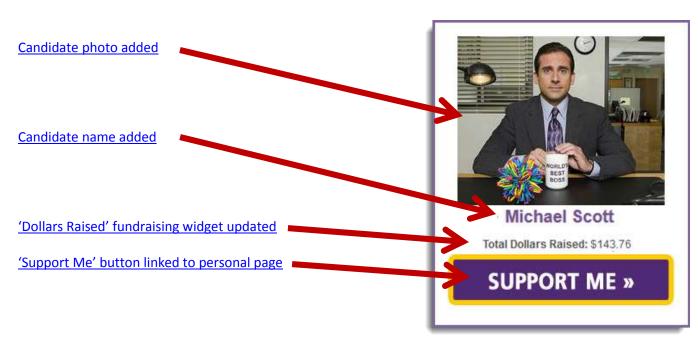
12. Once completed, these two codes should match exactly (which is an easy way to verify you've done it correctly)!

- 13. Once the code has been correctly updated, click **Save** to save your changes.
- 14. Then click **Enable WYSIWYG** to close out of the HTML Source Editor window.
 - a. Clicking Enable WYSIWYG ensures that the next time you open your page for editing, it will open in the WYSIWYG view, to allow for easy web page edits!



15. Once you save that page, the Candidate's photo and name will link to their personal page, and the personal donation counter should reflect their dollars raised.

This completes the Greeting Page edits for a registered Candidate on your website.





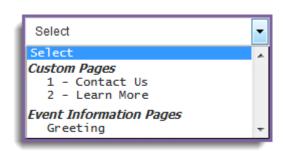
Event Web Site Customization - Additional Event Pages

You may also choose to customize some of the custom pages for your event website. The pages available for customizing are:

- Greeting Page (covered in the previous steps)
- Contact Us
- Learn More Update with additional information or announcements regarding your local Power in Purple event, as well as any other event specific information you wish to share

NOTE: Your Event Web Site content can be customized at any point during the fundraising season. Please make sure you are keeping the webpage content updated and relevant throughout the season.

- From the Event Manager Center, click Event Web Site in the top navigation bar
- 2. Select the page you wish to edit from the *Choose a page to edit* drop-down menu.
- 3. Click on the blue Edit button to open that particular page for editing.
- 4. Use the WYSIWYG toolbar to make the desired updates.

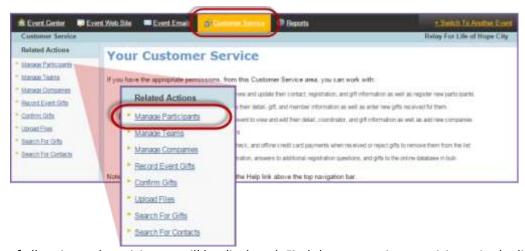


For complete instructions customizing and managing the content of your website, please download the <u>Event Site Management Guide</u>. We recommend you print this guide and keep it handy throughout the fundraising season.

Updating Candidate's Personal Page Content

As an Event Manager, you can also update the Candidate's personal page content and image. We recommend that participants update this content themselves, but if you have an Candidate who requests your assistance, you can update their personal page through the EMC.

- 1. From the Event Management Center, click **Customer Service** in the top Navigation Bar.
- 2. Under Related Actions, select 'Manage Participants.'



3. A list of all registered participants will be displayed. Find the appropriate participant in the list provided or through the search function.



4. Beside the participant's account, click Manage Participant to access the participant's profile.



- 5. Within the participant record is a menu of Related Actions. To update the personal page content, click 'Edit Pages.'
- 6. Make sure the Personal Page is selected.
 - a. You can edit the body text (their reason for participating)
 - i. Do not copy and paste content from an external source. If you want to paste content provided by the Candidate, FIRST paste it into notepad to strip any text formatting, then paste into the Body Text field.
 - b. Or upload a new photo (since you already have their photo from updating the Greeting Page, this should be an easy update ③)!
- Related Actions

 Record Donation

 Edit Contact Information

 Edit Registration

 Make Inactive

 Make Private

 Create New Team

 Change Team

 Edit Pages

7. Click **Finish** to save your changes!

We recommend you bookmark http://relayforlife.org/EMC_Guide to easily access the comprehensive EMC Manual and supporting documentation and how-to guides throughout the fundraising season.

Appendix A: EMC Access for New Staff and Volunteers

The process for training new staff and online chairs has been centralized and is now managed by the new Talent Strategy training team. Moving forward, the new Event Management Center (EMC) access process will require <u>ALL</u> Event Managers (both staff and volunteers alike) to review two EMC training videos before receiving EMC access to their online website.

Staff should follow the following process:

- 1. Log in to Society Source
- 2. Under Employee Services, click on Access: Learning
- 3. Under the 'Learning Tools' menu, click on the Society Pathways link
- 4. Launch Society Pathways, and locate the webinars by searching for 'Online Event Manager Center' there are two: one on Event Site Management, and one on Participant Management
- 5. Select **Start** to launch either course. We ask that you complete both courses
- 6. Upon completion of the training modules, staff will receive an email with a link to the EMC Access Request Form to officially request access to their event(s)
- 7. Staff will receive access within 2-3 business days after submitting the form

Full online chair volunteers should follow the following process:

- 1. Go to the Volunteer Learning Center https://volunteerlearning.cancer.org/
- 2. Log in if you are a returning volunteer, or register to create a new account
- 3. Click on Find Courses
- 4. Find the webinar you want to listen to by searching for 'Event Manager' there are a few, but two we are asking you to specifically take: one on Event Site Management, and one on Participant Management
- 5. Select **Enroll Me** to enroll in either course. We ask that you complete both courses
- 6. Once in the course you can listen to the webinar and/or download the training guide
- 8. Following the completion of the training module, the volunteer will need to complete the EMC Access Request Form to officially request access to their event(s)
- 9. Volunteers will receive access within 2-3 business days after submitting the form

Appendix B: Submitting Event Changes

As you are completing the customization process, if you find that any event details are incorrect, you will need to follow the formal process to submit the changes so they can be made in all databases. We have a new nationally centralized process for submitting various types of event requests, which allows us to update all databases as appropriate. The new process for submitting these types of requests can be accessed through EMT.

- 1. Log into EMT
- 2. On the Home screen, under the first section "Resources," select Update an Existing Event
- 3. A new page will open, taking you to the Event Change Request Form
- 4. Please be thorough when completing this form to ensure all your event details are accurate

Resources

- · Request a new event
- Update an existing event
- E-Revenue Request Center (online reports, email campaigns, customization and more!)
- Not sure where to go? Use this Quick Finder
- · helpme.cancer.org
- iBuy Request Form

