

# Intermountain Chapter Website Update Schedule

## Yearly Updates:

- On January 1<sup>st</sup>, block all expired members' accounts.
- Update the Chapter Membership Enrollment and Release form. Add our chapter name to the top of the form. Replace the form in the links on the Membership Page.
- Check to see if yearly dues have changed and update this on the Membership Page. Also, update the Member Information Form with the new yearly dues number.
- Add the new History and Events reports to the History Timeline Page. Create a new block listing officers for the current year.
- Obtain new officer pictures and update the Chapter Officer's Page to reflect the current board.
- Replace, if necessary, single pictures for Director, Membership, LOH, and Ride Lead on these respective pages.
- Check the Ride Leads listing for any changes in the Ride Lead Cadre.
- Update the dates in the Chapter Mileage Tracker View to filter for the new year.
- Update the dates in the Member Points Detail View to filter for the new year.
- Clear Member Points by uploading a CSV file with the Points field = 0.
- Update the Chapter Ride 365 Miles View to add the new year in the table.
- Update the User/%/Ride 365 View to add the new year in the table.
- Update the User/%/Check-ins View to filter for the new year.
- Disable in the main menu the cooking, burger burn, biker breakfast, and gift wrapping links. These will be reset and enabled later in the year as they are needed.
- Update the National HOG Challenges as they are published.
- Update the HOG Rally Calendar when it is published.

## Monthly Updates:

- The Editor will post the monthly newsletter on the Newsletters Page.
- Update the Events page with look-ahead information about Chapter Events and Rides. Be sure to update the View Calendar link for the correct month.
- Download National HOG records and upload this information into the data.
- Update the RC Calendar with points events as needed. Put dealership points events on the last day of the month so that they are available throughout the month. Add Volunteer points to any cooking or serving event listed on the Chapter Calendar.

## Periodic Updates:

- Change the information in the Events Ticker (news ticker) as needed. Try to pick 3 or 4 hot items that the members need to be aware of.
- Add events to the calendar as they come in.
- Inspect the membership for new members. Download the membership and update the Mailer Chapter Members list.
- Download the latest album from the Flickr site and select 15 to 20 pictures for the PhotoSlider on the Home Page. Replace the Gallery of images and run the Perl buildJSONfile.pl script to update the photos.json file. Edit the PhotoSlider.html file to update the revision date. Copy these files to the intermountainhog-support/PhotoSlider directory. Then use the GitHub application to upload and publish the new slider images.

## Mailer Campaigns:

Only the webmaster has access to the HOGScan Mailer at this time. There is a single account used for sending mail campaigns to the membership, thus all email campaigns are created and submitted by the webmaster.

Templates for the various communications have been created in the HOGScan Mailer. In most cases one simply replaces text where necessary for each campaign.

One important thing to note is that text fields only really handle text. Placing a table copied from Excel will not display properly on all platforms. A better solution is to place a button with a link to the appropriate site.

The following campaign templates have been created. Use these templates to send out Chapter Email Campaigns (Blasts). Modify the desired template to contain the new information to be sent out.

- Scheduled Overnight Rides
- Quick Ride Lead Mail
- Generalized Announcements
- New Member Orientation
- Chapter Updates
- Monthly Outlook
- General Membership Meeting
- Chapter Newsletter
- Chapter Event Coming Up

Additional campaign templates may be created as the year progresses, but these give a good starting point. Specific lists of member email addresses have been created. Occasionally, these lists will need to be updated to account for changes in the chapter. These are listed below:

- Chapter Members
- Road Captains
- Board Members
- Expired Members

IMPORTANT: Be sure to turn off tracking before sending the campaign. Tracking causes a warning message when a member selects a link that indicates the site selected is not a secure site. This is probably true of the tracking site that gets in the middle before the linked site is displayed.

## Membership Maintenance:

Check-list for **Adding** a new member:

- Select People/Add User
- Fill out the form and select role if appropriate.
- **Create New Account**
- Add member email to the Mailer list(s)

Check-list for **Removing** a member:

- **Block** the member and remove any assigned roles
- Remove the member from the **Facebook Group**
- Remove the member from any **shared files** in Google Drive
- Remove the member from any **calendar events** that they are participating in
- If the member is a **Ride Lead**, edit the Ride Leads list
- Remove the member from any **volunteer sheets** in Google Drive
- Remove the member from all lists in the **Mailer**

Updating Existing Records from National Records:

- First **Create a Membership Report** from National HOG
- Select HOGScan/Chapter Administration/Import – Update Roster
- Upload CSV file created in step #1
- **Disable First and Last Names**, as we don't want to overwrite current names
- Select **Update Existing Records**
- **Import**

#### Importing New Records from National Records:

- First **Create a Membership Report** from National HOG
- Select HOGScan/Chapter Administration/Import – Update Roster
- Upload CSV file created in step #1
- Select **Import New Records**
- **Import**

#### Clearing Points for the New Year:

- First **Create a Membership Report** from National HOG
- Add the Points field to the CSV file
- Set all members Points field to zero (0) in the CSV file.
- Select HOGScan/Chapter Administration/Import – Update Roster
- Upload CSV file created in step #3
- **Disable First and Last Names** as we don't want to overwrite current names
- Select **Update Existing Records**
- **Import**