

The background image shows a large, modern university building with a prominent skybridge extending from the top right towards the center. The building has multiple stories and large windows. The scene is surrounded by lush green trees and foliage. The entire image has a dark blue color overlay.

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**DURHAM\$U**

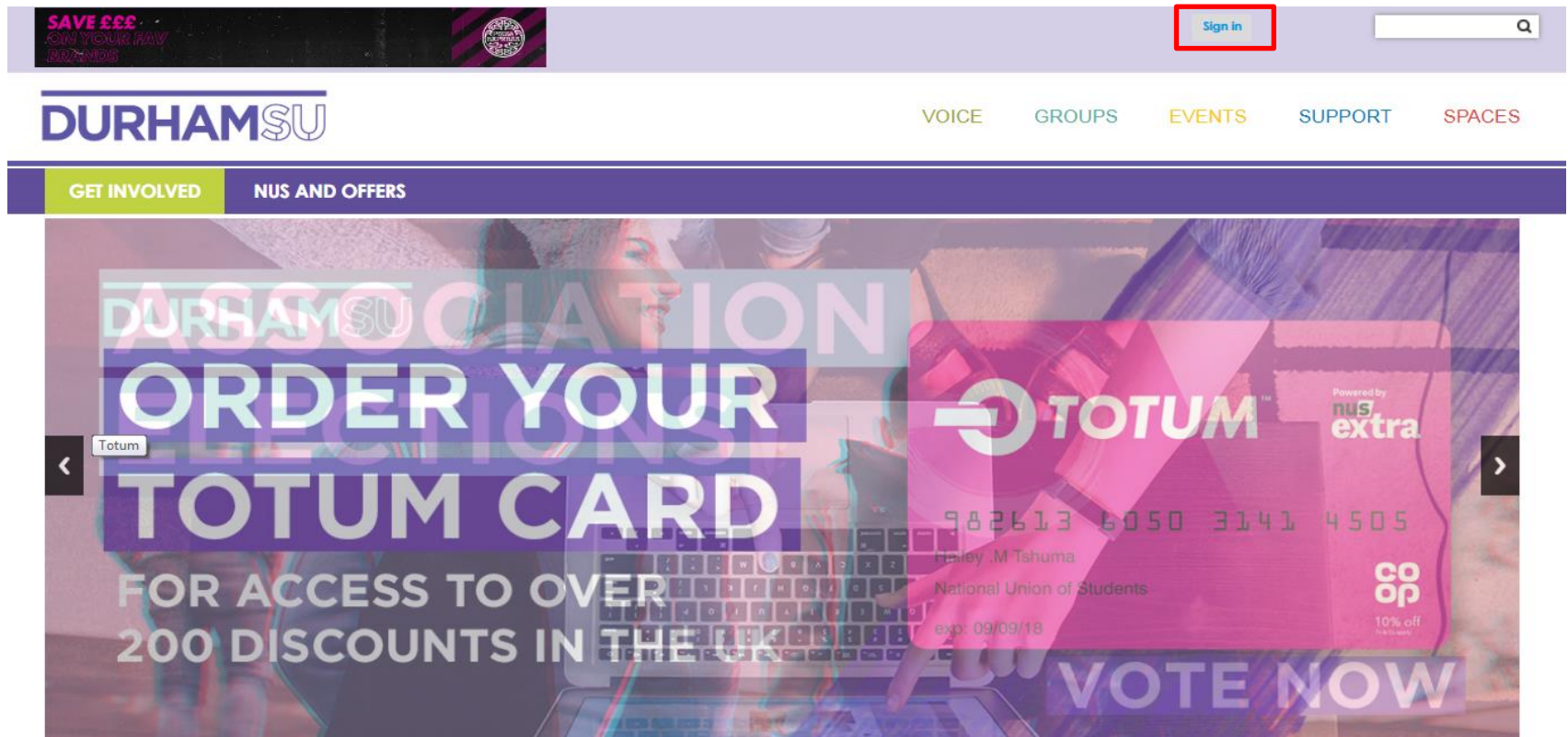
**Your Society Dashboard**

## What can you use the Dashboard for?

- Configure your group
- Assign administrators to your group
- View your groups members
- Add news articles (news stories) that appear on your webpages
- Add group events
- Send emails to your group members

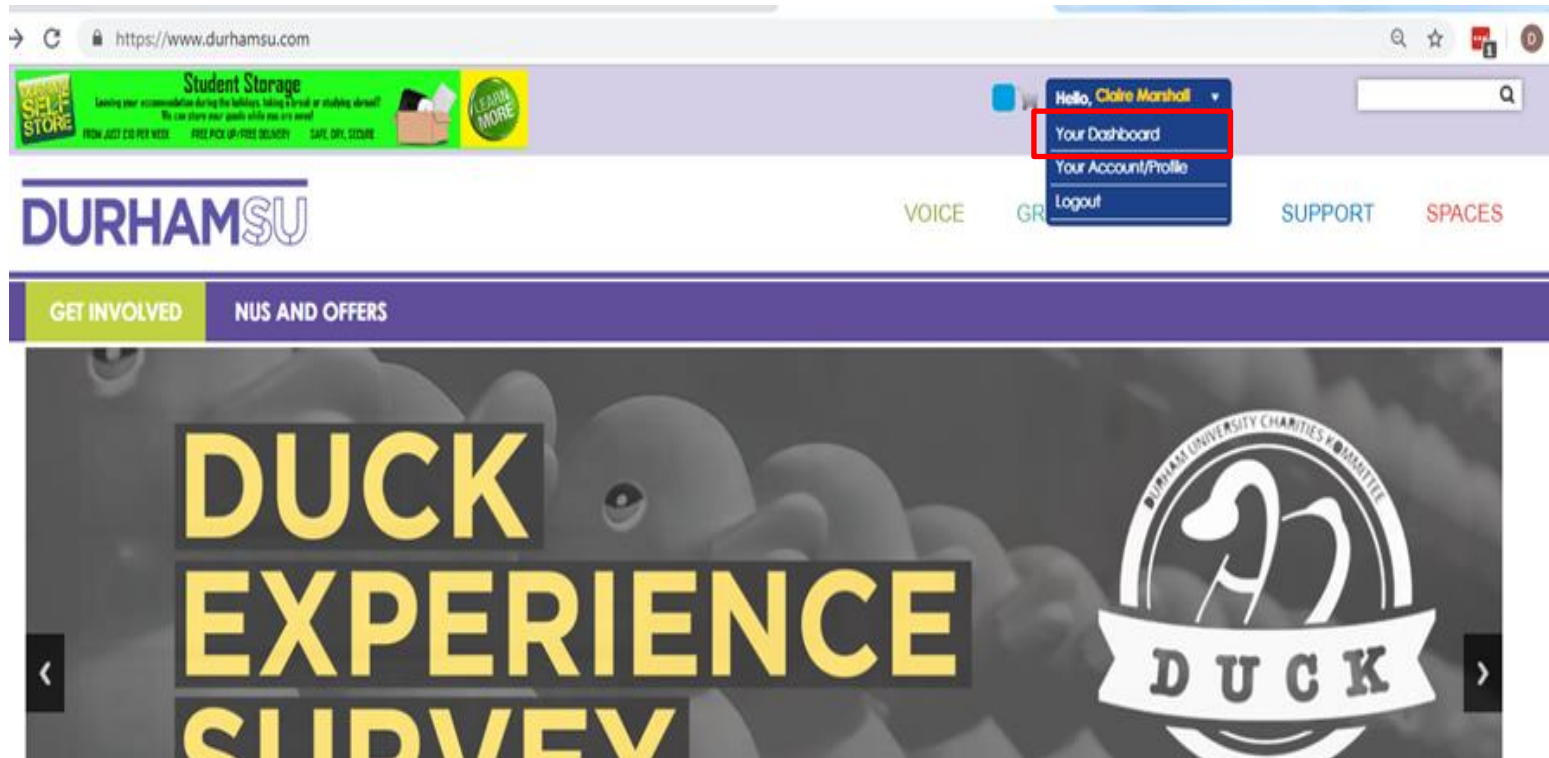
# Logging In

- 1) Open the Durham SU Website and click on “Sign In” button at the top of the screen

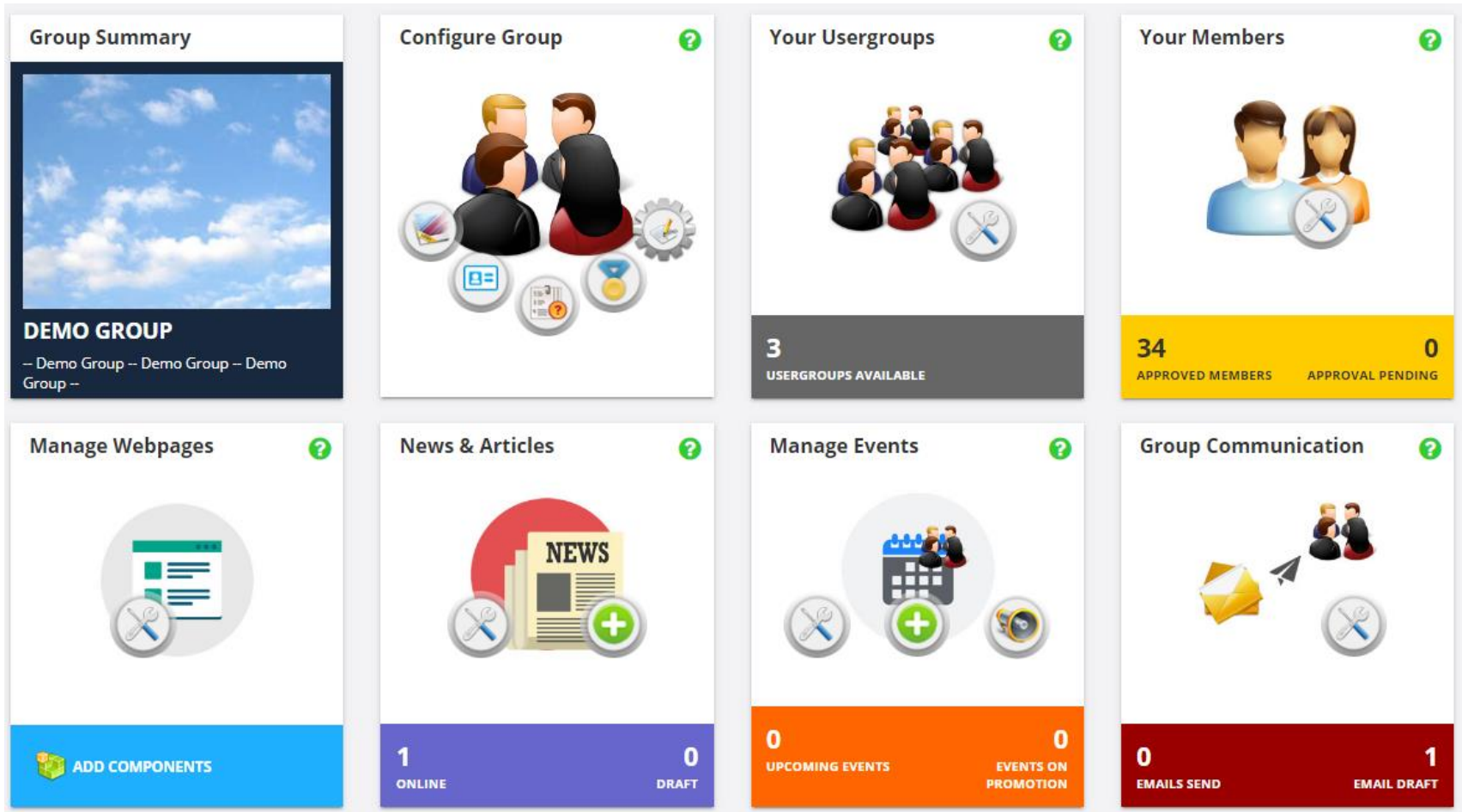


# Logging In

- 1) Once logged in click on your name at the top of the screen and select “Your Dashboard”



# Your Dashboard



# How to...Configure Your Group

# Configuring Your Group

1) Select the “Edit” button on the dashboard



# Configuring Your Group

2) Within the “Edit” tab you can check that your student group number is correct and enter a description which will appear on the website.

Summary **Edit** Group Logo Membership Types Questions Awards Social Media

**i** This section is where you can setup the basic settings for a new group on your site. Once you have completed this page you can then edit other aspects, such as memberships, committee and events, in the management page for your group. For more information about how this works [click here](#)

**Save & Approve**

**Name \***

Demo Group

Enter a name for the group

**Nominal code**

990

Nominal codes are used for group finances. If applicable, select a code from the list. To setup new codes use the setup menu.

**Description**

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# Configuring Your Group

3) You can also update your group's email address (this is the address any communications to your members will come from so it needs to be up to date)

**Configure email for outgoing mails for this group \***

Enter an email address that communications from this group will be delivered from.

**Display name \***

Enter a display name for this group communications.


# Configuring Your Group

4) Within the “Group Logo” tab you can update your logo, again this will appear on the website. You can either select a pre-existing image, or upload your own.

Summary Edit **Group Logo** Membership Types Questions Awards Social Media

**i** Here you can add a logo for your group. You can select from our default images in UnionCloud or upload a custom image. For more information about how this works [click here](#)

**Image**



Select from predefined logo

Upload New

# **How to...Assign Administrators To Your Group**

# Assigning Administrators

1) Select “Manage Usergroups” button on the Usergroup tab.

Your Usergroups



3

USERGROUPS AVAILABLE

# Assigning Administrators

2) This screen shows all of your usergroups. Click on the cog next to the “Administrators” group and “Show User Group”

**Demo Group**

Setup **User Groups** Events Content Management Membership details Communications Committee

*i* This section allows you to give edit permissions to users for this selected group. By default, you will see Administrators, Alumni and Current Members. You can edit these user groups or create new ones by using the 'Add User Group' button. For more information about how this works [click here](#)

**Add User Group**

Name	Member Count	
Administrators	[Show Count]	Show User Group
Alumni	[Show Count]	
Current Members	[Show Count]	

1-3 / 3

# Assigning Administrators

3) This screen shows a list of your administrators. To add a new administrator select the “Current Members” option and find the person name and membership expiry date, click “Add Members”.

## Administrators

[Edit](#) [Download Demographics](#)

Downloads

Current Members (Group) [CSV](#) [UPLOAD MEMBERS](#)

Select Member \*  | Membership Expiry Date \*

Type in a search term

[Add Members](#)

UID	University ID	Forename	Surname	DOB	Email	Membership Expiry Date	
12893523	ross.kitching@dur.ac.uk	Ross Kitching	TestStudent	18-07-1993	ross.kitching@dur.ac.uk	30-09-2020	⚙️
15658644		Claire	Marshall Test Student	03-03-2001	claire.marshall2@dur.ac.uk	01-09-2022	⚙️

1-2 / 2

# Assigning Administrators

## **Important Note:**

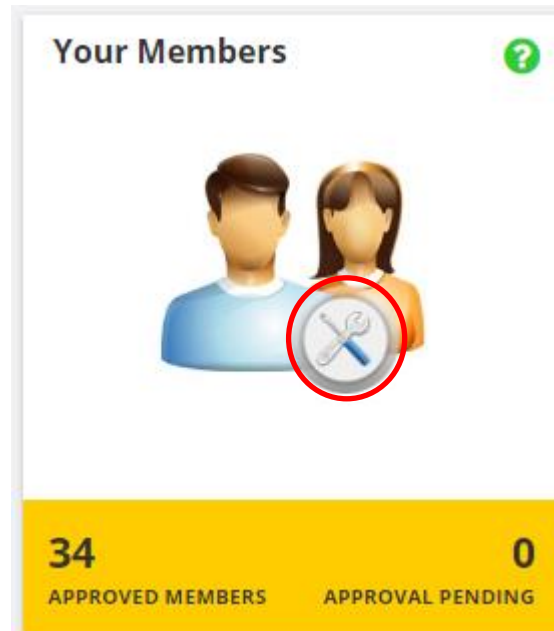
Administrators can view other member information and edit the group. Each group will assign a “Data Protection” lead (who will carry out Data Protection training), if administration access is given to other members, and a data protection breach occurs, the DP Lead will be responsible and accountable for this breach.

# How to...View Your Group Members



## Viewing your group members

1) Log into the website and on your dashboard select the “Manage Members” button on the “Your Members” tab



# Viewing your group members

2) From this screen you can view all of your members, along with any memberships that are pending approval, and blocked or rejected members

**Members**   Approval pending   Blocked members   Rejected members

**i** Below you can see a list of all confirmed members in this group. Use the eye icon to search/filter this section. For more information about how this works [click here](#)

**Save**   **Download Membership Details**   **Download All Member photos**

**Bulk Photo Downloads**

Forename ↓	Surname	Membership Type
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# How to...Create & Edit Articles

## Creating an article

1) To create a new article select “Create Article” on the News & Articles tab

News & Articles



1

ONLINE

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DRAFT

# Creating an article

2) Whilst creating your article you can toggle the button to “draft” and change to “Live” once it’s ready to be published. Use this page to give your article a title and write the content.

**Title \***

Enter a title for your article.

**Body \***

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3) An image can also be added to go alongside the article.

Display image on articles home page

Display image in article detail page

No file \*

Advised dimension : 320px\*220px. Supported image formats are [jpeg, .jpeg, .png, .x-png, .gif, .bmp]

# Creating an article

4) Under the “Advanced Options” you can also select dates for the article to be published and expire (it will go live as soon as you click save and it’s set to live otherwise), you can also assign the article to certain categories.

## Advanced Options



Below are the advanced options, these are not mandatory and are not required to make your article live on your site. However, if you wish to edit the finer details you can do this below.

### Show Advanced Options

#### Publish on



Use this to automatically publish your article at a set date and time.

#### Expires on



Use this to automatically unpublish your article at a set date and time.

#### Categories

Here you can select which categories this article relates to. If you need to create new article types this can be done in Admin > Setup > CMS > Article Categories

##### Assign Category / Sub Category

Academic Insights

Assembly

#### Other Settings

Include in RSS feed

Enable this to include this article in your sites RSS (Rich Site Summary)

Show on articles index page

Enable this to display this article on the <<union-url>>/articles page

# Updating an article

1) To edit a published article, select “Manage Articles” on the News & Articles tab

News & Articles



1

ONLINE

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DRAFT

# Updating an article

2) This screen shows all of the articles, select the “Edit article” button next to the article and follow the above steps to make any changes.

**Demo Group**

Setup User Groups Events **Content Management** Membership details Communications Committee

Pages (Tree View) Search Pages Favourites **Articles** Resources Images

**i** This is the summary page of your Articles within the Dashboard of your Union Cloud site, it shows you an overview of your most recent articles. From here you can add new articles and amend old articles.  
For more information about how this works [click here](#)

**Add Article**

Title	Created At	Updated At	Status	Category	Number of articles	
Welcome to our New Student Group	Thursday 30-03-2017 - 13:42	Thursday 08-11-2018 - 08:21	Live		49	<b>Edit Article</b> 🔍 ✎ 🗑️ ⌚ ⚙️

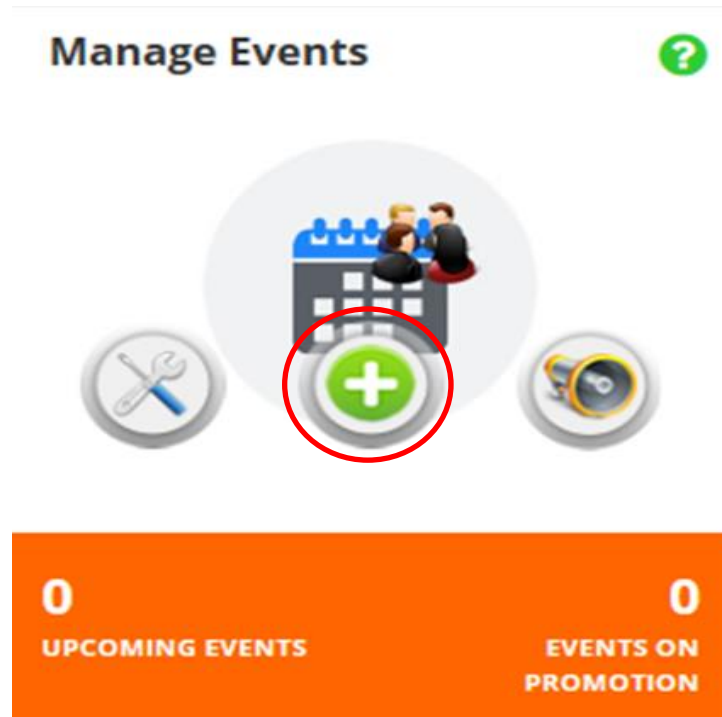
1-1 / 1



# How to...Create An Event

# Creating an event

1) Select “Add Event” on the “Manage Events” tab.




# Creating an event


2) Give your event a name (this will be displayed on the website), add the start and end date & time, and the date and time you want the event to be published on the website (if you want it to be published straight away then leave this box blank) and then add a description to tell people what the event is.

**Name: \***


Set a name for your event

**Start Date/Time: \***  

Set a start date for your event.














**End Date/Time: \***  

Set an end date for your event.

**Published Date/Time:**  

Events will be displayed to users when this date is reached else it will be published immediately.

**Description: \***

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# Creating an event

3) Select what type of event you are holding, you can also add a logo which will appear alongside the event on the website (you might want to add your group's logo) and then add the details of where the event is happening.

## Event type: \*

- |   |   |                                      |                                       |   |
|---|---|--------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> Advice           | <input type="checkbox"/> Campaigns            | <input type="checkbox"/> Club nights | <input type="checkbox"/> Debate       | <input type="checkbox"/> Democracy or Student Voice |
| <input type="checkbox"/> Festival or Fair | <input type="checkbox"/> Freshers             | <input type="checkbox"/> Gigs        | <input type="checkbox"/> Give It A Go | <input type="checkbox"/> Meeting                    |
| <input type="checkbox"/> Performing Arts  | <input type="checkbox"/> Social               | <input type="checkbox"/> Society     | <input type="checkbox"/> Sport        | <input type="checkbox"/> Travel or Trips            |
| <input type="checkbox"/> Volunteering     | <input type="checkbox"/> Workshop or Training | <input type="checkbox"/> SU Event    | <input type="checkbox"/> Other        |   |

## Add Logo

No file

Supported image formats are [.jpeg, .jpg, .png, .x-png, .gif, .bmp]

## Default Event Logo:



Default Event logo will get display if you do not add logo.

## Venue: \*

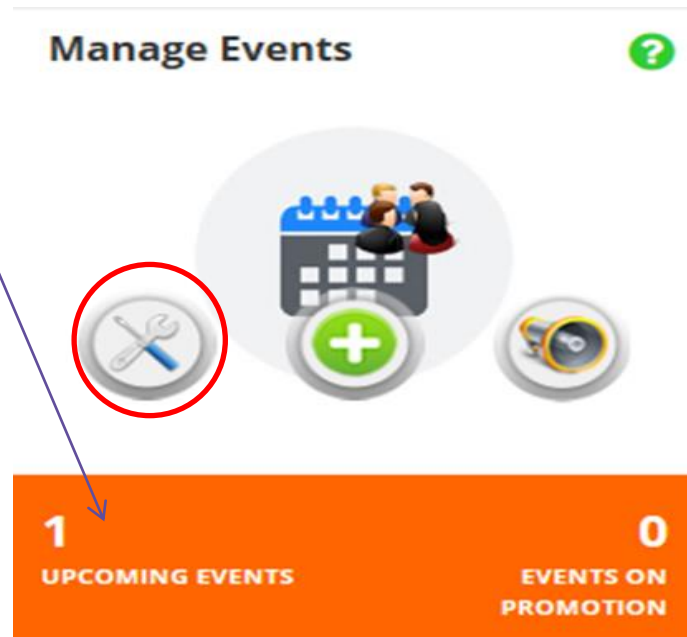
Where is this event taking place?



# How to...Create Event Tickets

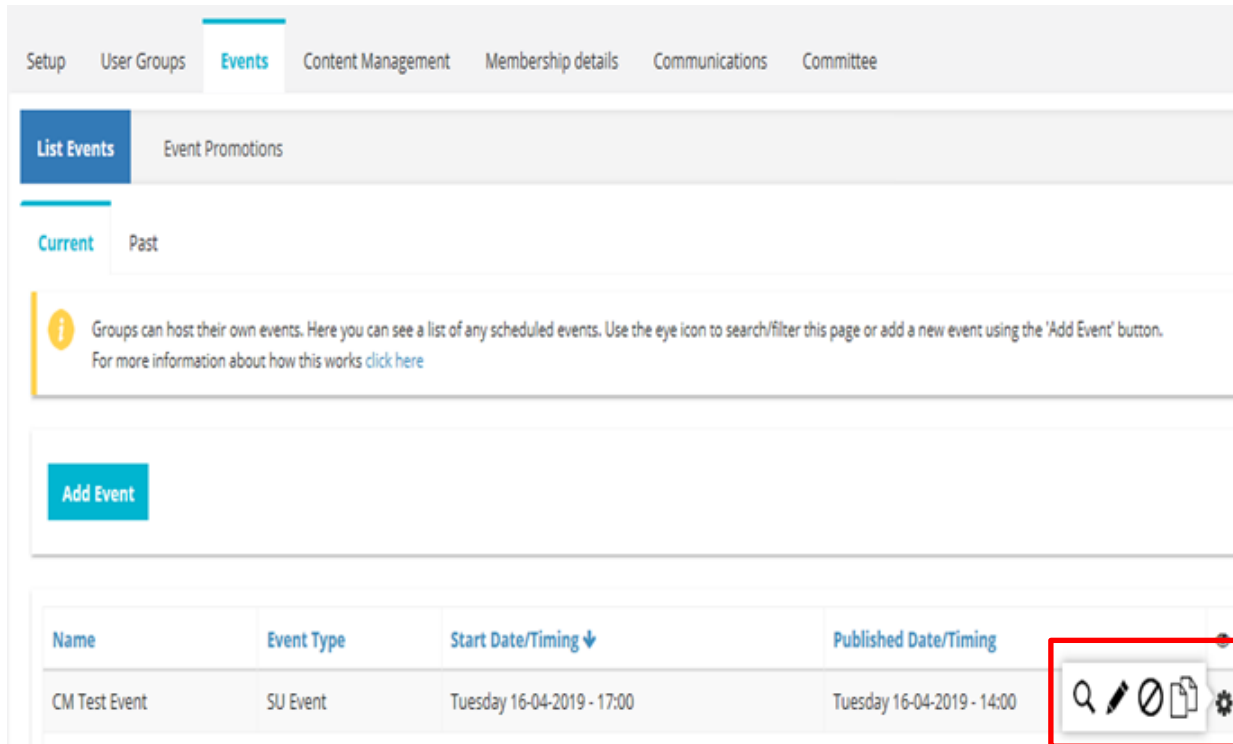
## Creating event tickets

1) Select “Manage Events” button on the “Manage Events” tab. You’ll notice that the orange banner also shows the number of upcoming events that your group has and which can be managed.



# Creating event tickets

2) To add tickets to your event, click the cog icon next to the event, then select the “Edit” (the pencil) button.



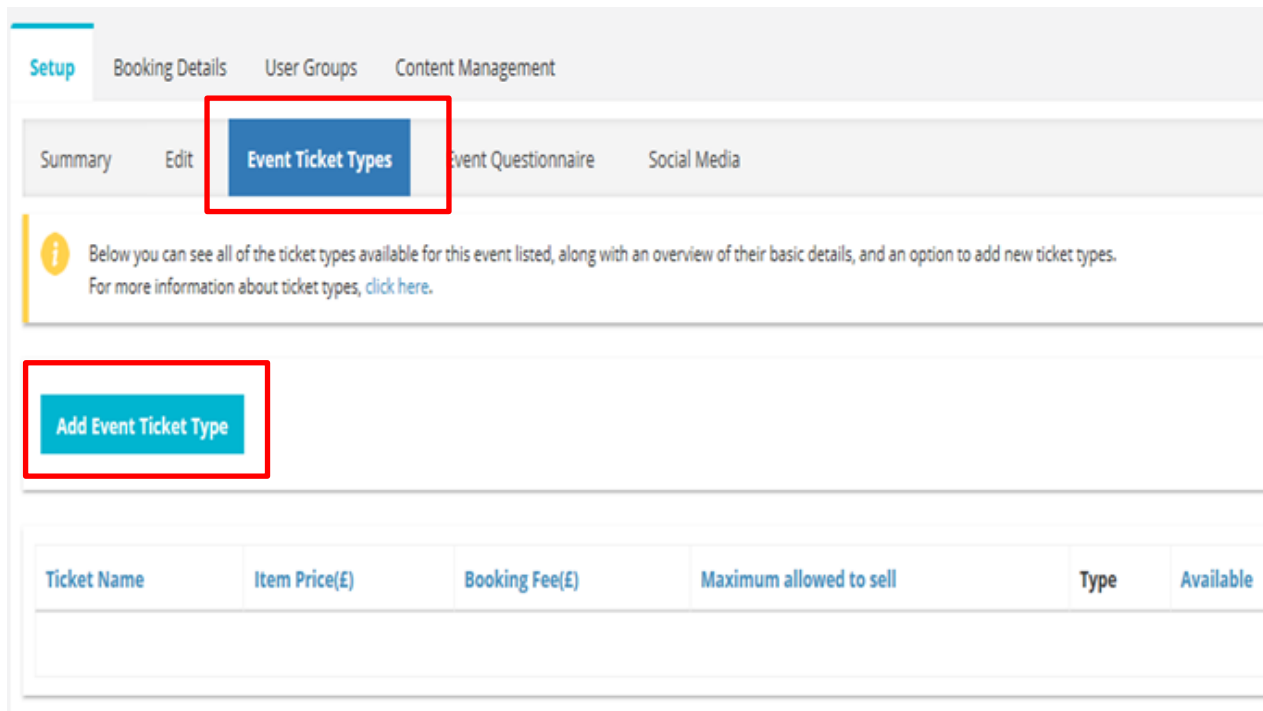
The screenshot displays a web interface for managing events. At the top, there is a navigation bar with tabs for Setup, User Groups, Events (selected), Content Management, Membership details, Communications, and Committee. Below this, there are sub-tabs for List Events and Event Promotions. A filter section shows 'Current' and 'Past' options. An information message states: "Groups can host their own events. Here you can see a list of any scheduled events. Use the eye icon to search/filter this page or add a new event using the 'Add Event' button. For more information about how this works [click here](#)". A blue 'Add Event' button is visible. Below the message is a table with the following data:

Name	Event Type	Start Date/Timing ↓	Published Date/Timing
CM Test Event	SU Event	Tuesday 16-04-2019 - 17:00	Tuesday 16-04-2019 - 14:00

A red box highlights the action icons for the 'CM Test Event' row: a magnifying glass (search), a pencil (edit), a trash can (delete), a document with a plus sign (share), and a gear (settings).

# Creating event tickets

3) Select the “Event Ticket Types” button and “Add Event Ticket Type”.



The screenshot displays a web interface for event management. At the top, there are navigation tabs: 'Setup', 'Booking Details', 'User Groups', and 'Content Management'. Below these, a secondary set of tabs includes 'Summary', 'Edit', 'Event Ticket Types', 'Event Questionnaire', and 'Social Media'. The 'Event Ticket Types' tab is highlighted with a red box. Below the tabs, an information icon (i) is followed by the text: 'Below you can see all of the ticket types available for this event listed, along with an overview of their basic details, and an option to add new ticket types. For more information about ticket types, [click here](#).' Below this text, a red box highlights a blue button labeled 'Add Event Ticket Type'. At the bottom, a table with the following headers is visible: 'Ticket Name', 'Item Price(£)', 'Booking Fee(£)', 'Maximum allowed to sell', 'Type', and 'Available'.



# Creating event tickets

4) You can create numerous ticket types (member / non-member tickets for example). Give your ticket type a name and select whether you want them to be available online / offline / both, and set the ticket price. The nominal code is your student group code, and select how many of that ticket type you want to sell. Finally give your ticket a description.

**Ticket Name \***

Enter a name for this ticket type.

Bulk Tickets

Check this to mark this ticket for bulk purchase. Note that bulk tickets can only be purchased via Remote Sales and its quantity reserved from the overall event capacity.

**Availability \***

Online  Offline  Both

This determines whether this ticket type is available for Sale via the website eshop (Online) or Remote Sales (Offline) or both of these.

Price		Fee	Total
<input type="text" value="1.00"/>	+	<input type="text" value="0.00"/>	= £1.00
Base Price of a ticket		Booking fee charged per ticket	

**Nominal code \***

Select the nominal code for this event ticket type.

**Maximum number allowed to sell**

Enter a numeric limit if sales of these tickets needs to be capped.

**Ticket Description \***

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# Creating event tickets

## Important Note

If you are selling tickets that include alcohol, you must also sell a non-alcoholic ticket type.

Any groups that use the University name are not permitted to include more than 3 units of alcohol in the ticket price. These groups can however provide more than 3 units, but this must be done as a separate transaction to the ticket (e.g. purchasing a drink voucher).

For more information about events with alcohol please see the FAQ page on our website: <https://www.durhamsu.com/societies/health-and-safety>

# Creating event tickets

5) Once all of the fields are complete, click on “Show Advanced Options”, here you can select a date and time for your tickets to go on sale and for sales to stop. You can also limit the number of tickets that users can buy.

### Show Advanced Options


#### Configuration

**Cost Centre Code**

This can be in any format you would like it to be and can help you audit your events at a later date.

---


**Start Date Time**

Set a start date from which this ticket type should be available for sale

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**End Date Time**

Set an end date post which this ticket type will not be available for sale.

---

**Maximum number of tickets a user can purchase**

## Creating event tickets

6) If the specific ticket type is only available to selected people (e.g. your members) use the “Usergroup” box to select your group (the format will be “Current Members--followed by your student group name). If you would like the ticket to be open to all students enter “Activated Students—Union—Union”. If the ticket is open to anyone then leave this blank. Once you have entered the details click on the “Save Event Ticket Type” box at the top of the screen and repeat the process if you want to add other ticket types.

### Usergroup

Here you can enter usergroups, anyone outside of those usergroups will not be able to see this ticket type for purchase

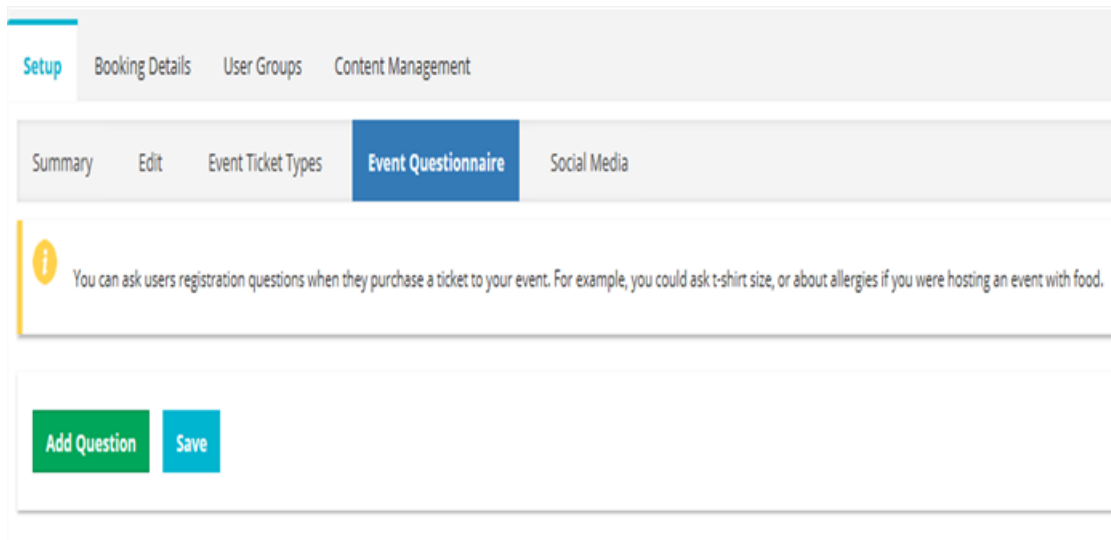
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### Mandatory related membership type

Any memberships you enter here will restrict only those who have already purchased the above membership to be able to purchase this membership.

# Creating event tickets

7) You can also add questions to your tickets that users will have to answer when purchasing a ticket; this can be used to ask for allergy information if you are serving food at your event for example. To set the questions you need to be in your event and then select “Event Questionnaire”



The screenshot shows a web interface for setting up an event questionnaire. At the top, there is a navigation bar with tabs for 'Setup', 'Booking Details', 'User Groups', and 'Content Management'. Below this, a secondary navigation bar contains tabs for 'Summary', 'Edit', 'Event Ticket Types', 'Event Questionnaire' (which is highlighted in blue), and 'Social Media'. A yellow information icon is followed by a text box containing the instruction: 'You can ask users registration questions when they purchase a ticket to your event. For example, you could ask t-shirt size, or about allergies if you were hosting an event with food.' At the bottom of the interface, there are two buttons: a green 'Add Question' button and a blue 'Save' button.

# Creating event tickets

8) Select the “Add Question” button and select whether you want the question to be a dropdown box / text box / checkbox and then add the question you want answering in the “Question” box and click save. To add more questions repeat this process.

The screenshot shows a form for adding a question. At the top, there are two buttons: 'Add Question' (green) and 'Save' (blue). Below these is a text input field labeled 'Union Processing Statement'. Underneath is a smaller text input field with the placeholder text: 'If you are collecting any additional information, please use this box to explain to users why, and what the data will be used for'. The main form area is titled '1. Action' with a dropdown arrow. Below this is a 'Display as' section with a dropdown menu currently set to 'Single Select Dropdown'. A note below reads: '(Use this to select the type of question box you wish to use). Options(Add an option for the Dropdown / Checkbox list here) similar to other questionnaires in the system.' The 'Question' field is marked with a red asterisk and is currently empty. At the bottom of the form area is a button labeled 'Add Options'. Below the form is a checkbox labeled 'Display for specific ticket types'.

## Creating event tickets

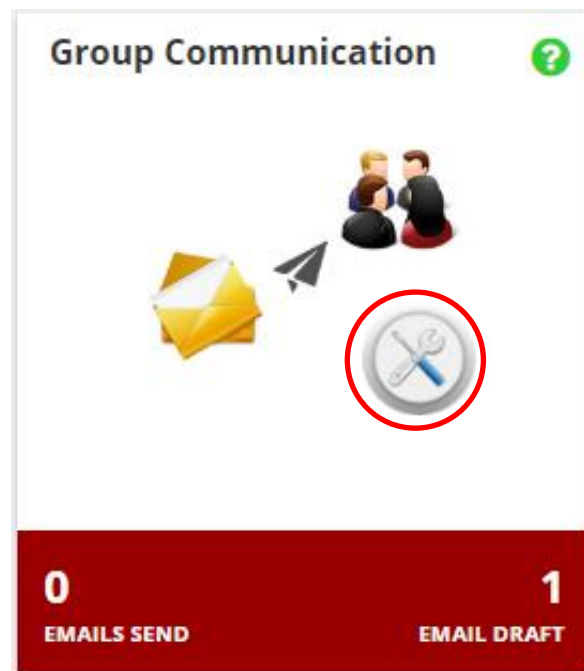
Only the Opportunities team have access to view the responses to the questions so please email [dsu.engagement@durham.ac.uk](mailto:dsu.engagement@durham.ac.uk) and one of the team can download and send the responses to you.

# **How to... Send E-mails To Your Group Members**



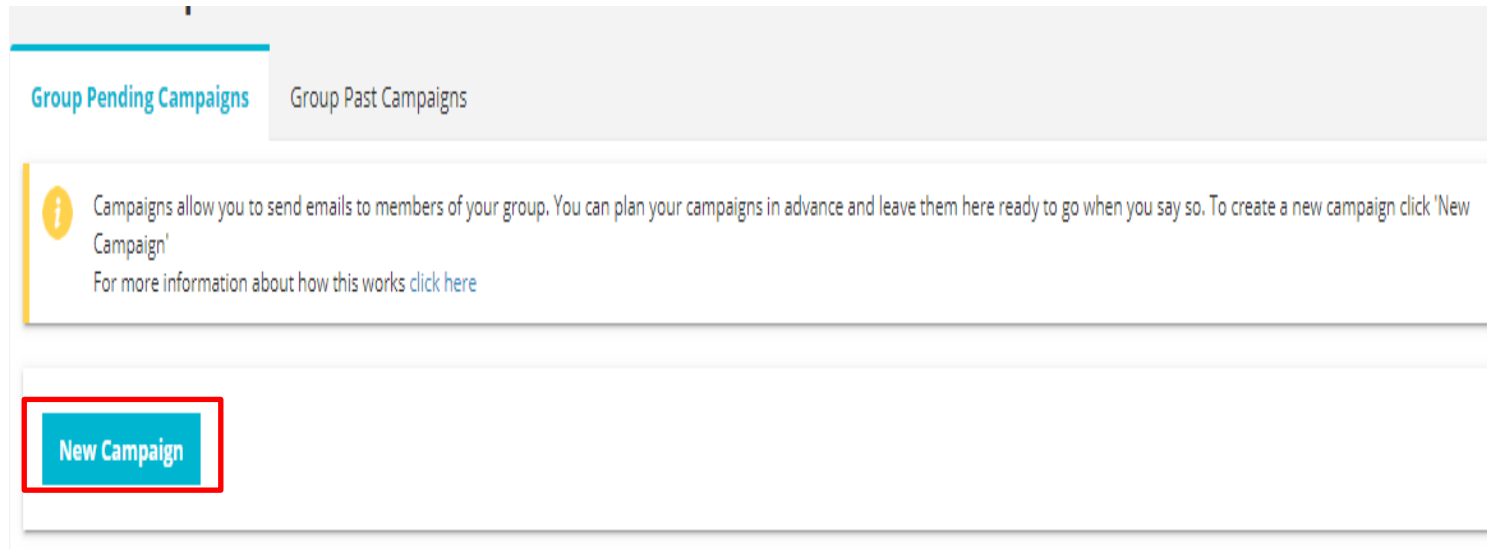
# Sending emails to your group members

1) Select the “Manage Group Communications” button on the “Group Communications” tab



# Sending emails to your group members


## 2) Select the “New Campaign” button



# Sending emails to your group members

3) Give your campaign a name (this has to be unique and not the same as any other previous campaigns), you can also give it a purpose / description.

## Create Campaign

 This section is where you create your new campaign. You can select an audience for your campaign from any of the user groups on your site and use HTML code to build your email content. For more information about how this works [click here](#)

Send

Save as Draft

Cancel

Name \*

Give your campaign a name

Purpose

Optionally, you can enter a purpose for your campaign. From the Pending/Past campaigns pages you can then group your campaigns by purpose.

# Sending emails to your group members

4) Select the “campaign type” as Communication. Next you need to specify which user group the communication is going to, e.g. if it is for all members select “Current Members” in the “Include criteria” box. Once you have entered the user group you can click “Show target audience” and this tells you how many people the email will go to.

**Recipient criteria**

**Campaign type \***  
Communication

**Include criteria**

Any members that meet the below criteria will be included in this campaign

User is between ages  
18 - 30

User is member of All of

**User Groups**  
Current Members--Demo Group--Group

Search and add usergroups from your site. You can add more than one.

**Exclude criteria**

Any members that meet the below criteria will be excluded from this campaign

User is between ages  
18 - 30

User is member of All of

**User Groups**

Search and add usergroups from your site. You can add more than one.

**Audience Reach**

Once you have set your Include and Exclude criteria you can use this section to view how many people your campaign will be delivered to.

**32** inclusive  
also belonging to all the user groups **Current Members(Current Members--Demo Group--Group)**

**SHOW TARGET AUDIENCE**

Select one or more recipients.

# Sending emails to your group members

5) Make sure that the email address for your group is in the “From” box, give the email a subject, you can then start writing the content.

**From \*** info@durhamsu.com ▼

Set the email address your campaign will be sent from

**Email Subject \***

Enter the email subject here

Default Union Email Header

Default Union Email Footer

Enable the above checkboxes if you want your email to have the default email header/footer.  
Your email header is your Logo and you can setup/edit your footer in the admin section of your site.

Check the above check boxes, if default union email header and footer is required.


**Email Content \***

Source **B** *I* U Format **Font** **Size**

# Sending emails to your group members

6) Once the content is added, if you are ready to send the email straight away click “send”

## Edit Campaign

 This section is where you edit your campaign. You can select an audience for your campaign from any of the user groups on your site and use HTML code to build your email content. For more information about how this works [click here](#)

Send






Save as Draft

Cancel

7) If you want the email to be saved and sent another day click “Save as Draft” and the email will be kept on the “Campaigns” page of the dashboard until you are ready to send it out.

New Campaign

## Group Pending Campaigns (2)

Name	Type	Purpose	Recipients	E-Mail Content	Status	Emails	
Test	Communication		32		<span>Draft</span>	info@durhamsu.com <info@durhamsu.com>	
The Monthly Group Email	Communication	Monthly Email	3		<span>Draft</span>	Temp address pending ratification <info@durhamsu.com>	

**Over To You...**

## Your Turn!

Log in to your group and:

- Set up a test event
- Set up tickets for your test event to include an alcohol and non-alcohol option
- Set up a new test communication to go out to your group