



IT Solutions for Your Business

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# CSOOC

## Member's Admin Instructions

## CSOOC Members Admin Instructions

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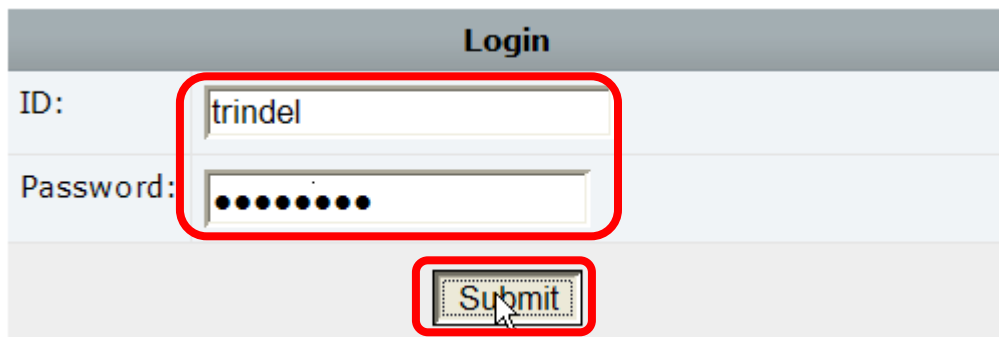
## CSOOC Members Admin Instructions

### Logging in and First Login - Updating contact information

Once your county has been added to the website, the main contact at the county can log in and update their contact information as well as begin creating other members and update their portions of the website. If you do not have a login, please contact your county's administrator

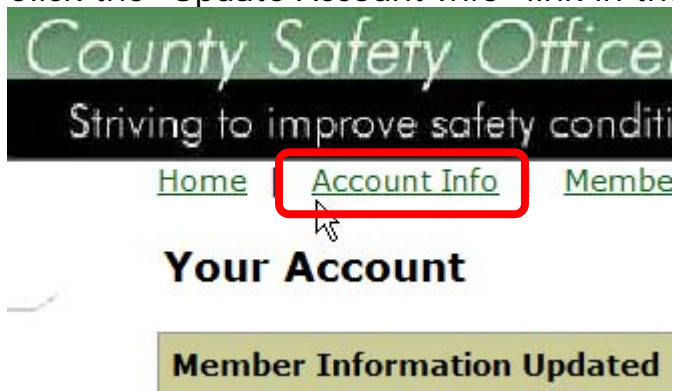
#### MEMBER ADMIN (<http://www.csooc.org/membersAdmin>)

- 1) Log into the memberAdmin area with the supplied Login and Password

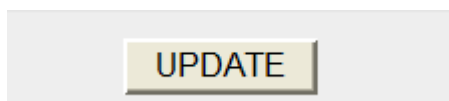


The screenshot shows a login form titled "Login". It has two input fields: "ID:" with the text "trindel" and "Password:" with ten black dots. A "Submit" button is located below the fields. Red boxes highlight the ID and Password fields, and the Submit button.

- 2) Click the "Update Account Info" link in the top navigation



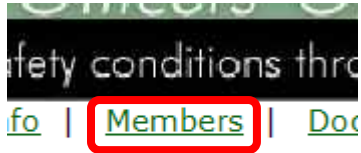
- 3) Enter all contact information and click the "Update" button



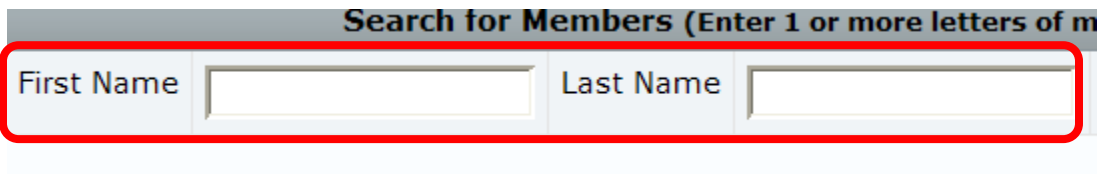
## CSOOC Members Admin Instructions

### Members Search and Email


1. To search for a new member, click on the Members link at the top.



2. Enter the first few letters of the member's first and/or last name.

A screenshot of a search form titled 'Search for Members (Enter 1 or more letters of m'. The form has two input fields: 'First Name' and 'Last Name'. Both input fields are highlighted with a red rectangular box.

3. Select a county option and then click the Search Button to view a list.

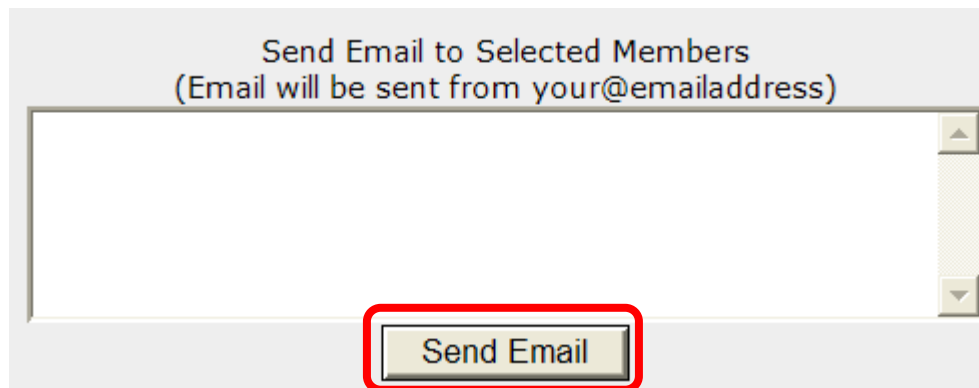
A screenshot of the search form showing a dropdown menu for 'County' with 'All Counties' selected. A 'Search' button is located to the right of the dropdown menu.

4. To email selected members, put a check in the box next to their names.

Email	
jschwind@co.slo.ca.us	<input checked="" type="checkbox"/>

## CSOOC Members Admin Instructions

5. Enter the message into the text box and then click the Send Email button.



Send Email to Selected Members  
(Email will be sent from your@emailaddress)

Send Email

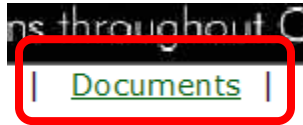
6. Put a check in the column header box to select all members displayed

Email	
jschwind@co.slo.ca.us	<input checked="" type="checkbox"/>
john_l@co.lake.ca.us	<input checked="" type="checkbox"/>

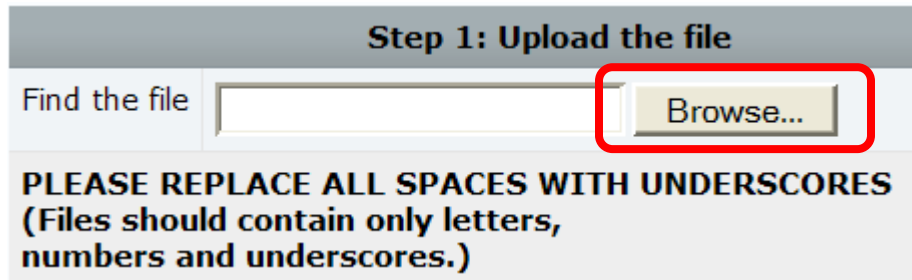
## CSOOC Members Admin Instructions

### Upload Documents

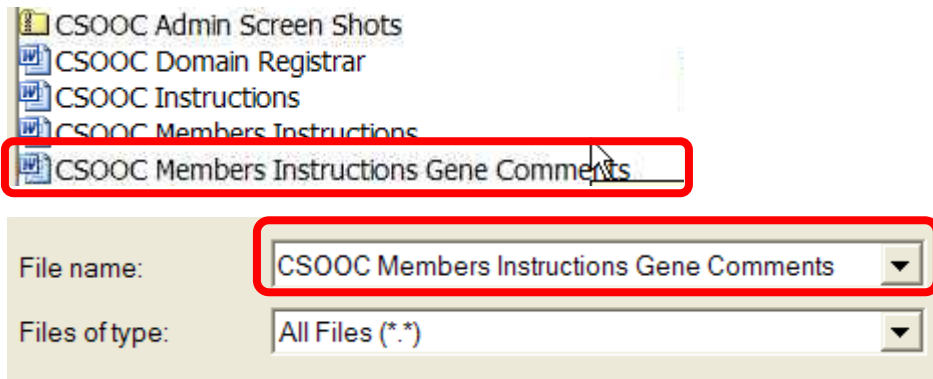
1. Click on the Documents link at the top.



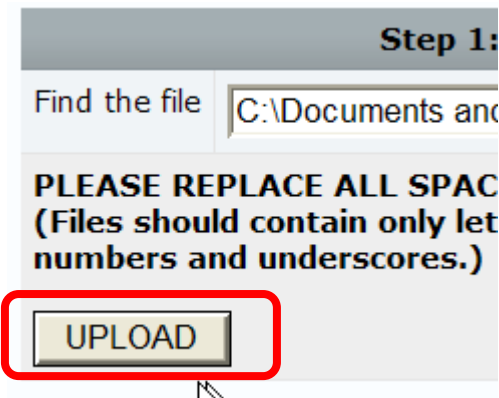
2. In the Step 1: Upload the File box, Click the Browse Button.



3. You will be able to search your local computer for a file to upload. Select the file and click Open.



4. That explorer window will close. Click the Upload button.



## CSOOC Members Admin Instructions

5. After the file is uploaded, you can select the category and set a Friendly Name that will display for people to know what your document is. Click the Add button.

Step2: Add File Information	
Category	Policies & Procedures - General
Display Name	CSOOC Web Page in
File Name	CSOOC Members Instructions Gene Comments2015611.doc
<input type="button" value="ADD"/>	

6. Your document is loaded and after approval by the board, will be set live on the main website for all to see.

Status	Update
Approved	UPDATE

### To update a document

1. To update a document that you uploaded, if the list of documents is NOT displaying, click on the "Display List of Documents" link at the bottom of the page.

Step 1: Upload the file

Find the file

**PLEASE REPLACE ALL SPACES WITH UNDERSCORES  
(Files should contain only letters,  
numbers and underscores.)**

[Display List of Trindel Insurance Fund Documents](#)

## CSOOC Members Admin Instructions

2. You will see a list of your documents. Click the update link and the Step 2 box at the top will be auto populated by the information about that document. Make any changes and click the Update Button.

	Size	Member   Date	Status	Update	
n	48Kb	Trindel 12/10/2008 7:23:39 AM	Approved	<a href="#">UPDATE</a>	<a href="#">DE</a>

[EVISION10122232.doc](#)

### To delete a document, i

1. If the list of documents is NOT displaying, click on the "Display List of Documents" link at the bottom of the page to display the list.

Step 1: Upload the file

Find the file

**PLEASE REPLACE ALL SPACES WITH UNDERSCORES  
(Files should contain only letters, numbers and underscores.)**

[Display List of Trindel Insurance Fund Documents](#)

2. Click on the DELETE link to remove it from the website.

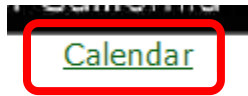
Member   Date	Status	Update	
ndel /10/2008 7:23:39 l	Approved	<a href="#">UPDATE</a>	<a href="#">DELETE</a>




## CSOOC Members Admin Instructions

### Create Calendar Events

1. Click on the Calendar link at the top of the page.




2. Fill out the Add EVENT form with the necessary information. (An image is not a required field) and click the Add button.

Add EVENT	
Event Title	Spring CSOOC Conference
Description	Ventura, California Crown Plaza @ Ventura Beach  452 Characters Remaining
Event Date (mm/dd/yyyy)	04/13/2009
Start Time	9:00 AM ▼
End Time	10:00 AM ▼
All Day	<input checked="" type="checkbox"/>
Image:	 A grid of icons for image selection, including a calendar, a globe, a laptop, and a flag.


## CSOOC Members Admin Instructions

3. Your event is loaded and after approval by the board, will be set live on the main website for all to see.


Spring CSOOC Conference	4/13/2009	All Day		Trindel 1/20/2009 2:02:15 PM	<a href="#">UPDATE</a>	<a href="#">DELE</a>
<b>DESCRIPTION:</b> Ventura, California Crown Plaza @ Ventura Beach						

### To update an event

1. To update an event that you uploaded, scroll to the bottom of the page and click the update link next to the event you would like to update.

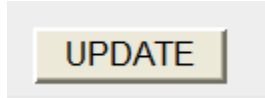
	Trindel 1/20/2009 2:02:15 PM	<a href="#">UPDATE</a>	<a href="#">DEL</a>
---	------------------------------------	------------------------	---------------------

2. The form at the top of the page will be auto populated by the information about that event.

Add EVENT	
Event Title	Spring CSOOC Conference
Description	Ventura, California Crown Plaza @ Ventura Beach  452 Characters Remaining
Event Date (mm/dd/yyyy)	04/13/2009
Start Time	9:00 AM ▾
End Time	10:00 AM ▾
All Day	<input checked="" type="checkbox"/>
Image:	

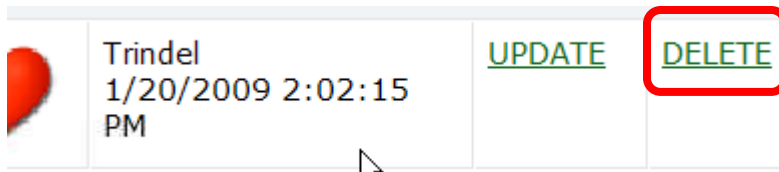
## CSOOC Members Admin Instructions

3. Make any changes and click the Update Button.



### To delete an event,

1. scroll to the bottom of the page and click the DELETE link to remove it from the website.



### Create a What's New posting

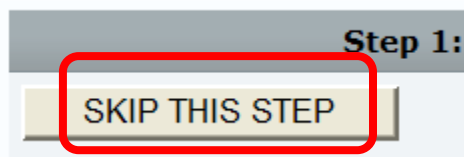
1. Click on the What's New link at the top of the page.



2. If there is an image associated with the post, add it just like uploading a Document.

A screenshot of a form titled "Step 1: Upload an Image". At the top is a grey header with the title. Below it is a yellow button labeled "SKIP THIS STEP". Underneath is a red-bordered box containing the text "Find the file", an empty text input field, and a yellow button labeled "Browse...". Below the red box is a grey box with the text: "PLEASE REPLACE ALL SPACES WITH UNDERSCORES (Files should contain only letters, numbers and underscores.)".

3. If there is not an image, click the "SKIP THIS STEP" link.



## CSOOC Members Admin Instructions

4. In the Step 2 Box, add a title and description and click the Add button.

Step2: Add Details	
Title	<input type="text"/>
Description	<div style="border: 1px solid #ccc; height: 100px;"></div> <p>1000 Characters Remaining</p>
Image	None
<input type="button" value="ADD"/> <a href="#">Cancel</a>	


### To update a post

1. To update a post that you uploaded, scroll to the bottom of the page and click the update link next to the post you would like to update.

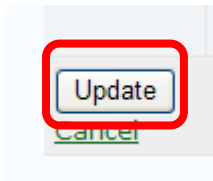
Image Name	Member   Date	Update	
	Trindel 12/3/2008 11:48:07 AM	<input type="button" value="UPDATE"/>	<a href="#">DEL</a>

## CSOOC Members Admin Instructions

2. The form at the top of the page will be auto populated by the information about that event.

Step2: Add Details	
Title	Fall Conference with a view
Description	Kudos to Lake County and John hosting the Fall conference. A conference with a breathtaking  882 Characters Remaining
Image	

3. Make any changes and click the Update Button.



### To delete a post,

1. scroll to the bottom of the page and click on the DELETE link to remove it from the website.

Image Name	Member   Date	Update	
	Trindel 12/3/2008 11:48:07 AM	<a href="#">UPDATE</a>	<a href="#">DELETE</a>

### Create a Link

1. Click on the Links link at the top of the page.



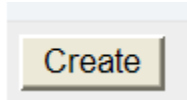
2. Fill out the Create Link form with the necessary information.  
NOTE: the Short URL is the web address that will be displayed to people.

Create Link	
Category	Select a Category
URL	http://
Short URL	<input type="text"/>
Title	<input type="text"/>
Description	<input type="text"/>
400 Characters Remaining	

3. If the link to a website page is long, just enter the web address of the main site to this field. (Example: A specific webpage might be:  
<https://www.microsoft.com/dynamics/casestudies/rms.aspx?casestudyid=4444444> – You can enter [www.microsoft.com](http://www.microsoft.com) so that people know they are going to the Microsoft site but do not have to look at the long address for the specific page they will be visiting.

## CSOOC Members Admin Instructions

4. Click the Create button.



5. Your Link is loaded and after approval by the board, will be set live on the main website for all to see.

Member   Date	Status	Update	
Trindel 2/16/2009 10:51:29 AM	Cued	<a href="#">UPDATE</a>	<a href="#">DEL</a>

### To update a Link

1. To update a link that you uploaded, scroll to the bottom of the page and click the update link next to the link you would like to update.

Member   Date	Status	Update	
Trindel 2/16/2009 10:51:29 AM	Cued	<a href="#">UPDATE</a>	<a href="#">DEL</a>

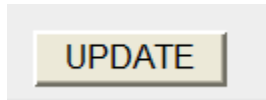
2. The form at the top of the page will be auto populated by the information about that event.

Update Link	
Category	Safety & Risk Management Professional Links - Ger
URL	<a href="http://www.trindel.org">http://www.trindel.org</a>
Short URL	<input type="text" value="trindel.org"/>
Title	<input type="text" value="Trindel's Home Page"/>
Description	Home page for Trindel Insurance Fund
	364 Characters Remaining



## CSOOC Members Admin Instructions

3. Make any changes and click the Update Button.



### To delete a link,

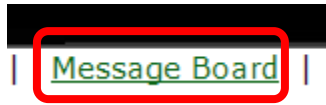
1. scroll to the bottom of the page and click the update link next to the link you would like to delete and click on the DELETE link to remove it from the website.

Member   Date	Status	Update	
Trindel 2/16/2009 10:51:29 AM	Cued	<a href="#">UPDATE</a>	<a href="#">DELETE</a>

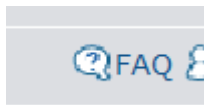
## CSOOC Members Admin Instructions

### Message Board

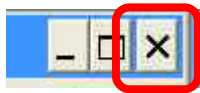
1. To review posts and view other's posts, you can click the Message Board link at the top of the page.



2. This will open a new window for you to work with. There is an FAQ and instructions on that site.



3. To return to the Members Admin area, simply close or minimize the window.



## CSOOC Members Admin Instructions

### FAQ

#### Q. How do I turn alerts for new content on/off?

A. Click on the Account Info link at the top of the members admin page. In your profile, you can turn the alerts on/off by checking the appropriate option for the field: *Would you like to receive emails when new items are added to the website?*

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Would you like to receive emails when new items are added to the website? Y  N

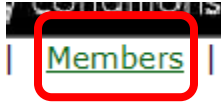
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# CSOOC Members Admin Instructions

## Administrator Access

### Member Creation

1. Click on the Members link at the top.



2. and then fill in the new member's information in the Create Member form.

### Members

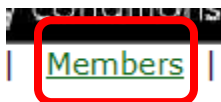
Search for Members (Enter 1 or more letters of member's first and/or last name)			
First Name	<input type="text"/>	Last Name	<input type="text"/>
		County	Fresno County

CREATE MEMBER			
Member Type:	Select Member Type <input type="text"/>	Address1	<input type="text"/>
ID: (6-10 Letters AND Numbers)	<input type="text"/>	Address2	<input type="text"/>
Password (6-10 Letters AND Numbers)	<input type="text"/>	City	<input type="text"/>
Confirm Password (6-10 Letters AND Numbers)	<input type="text"/>	State	<input type="text"/>
First Name	<input type="text"/>	Zip	<input type="text"/>
Last Name	<input type="text"/>	Email	<input type="text"/>

### Member Update

1. Click on the Members link at the top.



## CSOOC Members Admin Instructions

2. Search for a member (see Member Search instructions). You will see a list of members. Members of your county will have an Edit link next to their names. Click that.

Email	
safety@countyofcolusa.org	<a href="#">EDIT</a>

3. Their information will be entered into the Create Member form and all fields will be updateable.

UPDATE MEMBER			
County	No Update	Board Member	<input type="text" value="Secretary Treasurer"/>
Member Type:	<input type="text" value="General"/>	Address1	<input type="text" value="546 Jay Street"/>
ID: (6-10 Letters AND Numbers)	<input type="text" value="Admincol1"/>	Address2	<input type="text"/>
Password (6-10 Letters AND Numbers)	<input type="password" value="....."/>	City	<input type="text" value="Colusa"/>
Confirm Password (6-10 Letters AND Numbers)	<input type="password" value="....."/>	State	<input type="text" value="CA"/>
First Name	<input type="text" value="Lynda"/>	Zip	<input type="text" value="95932"/>
Last Name	<input type="text" value="Pope"/>	Email	<input type="text" value="safety@countyofcolusa.org"/>
Department / Company	<input type="text" value="Risk Management"/>	Phone (Just Enter Numbers)	<input type="text" value="(530) 458-0419"/>
Position	<input type="text" value="Safety Officer"/>	Fax (Just Enter Numbers)	<input type="text" value="(530) 458-7851"/>
Active Status	<input type="text" value="Active"/>	Admin Access	<input type="text" value="Yes"/>

Would you like to receive emails when new items are added to the website? Y  N

4. Make any changes and click the Update Button.

