Quick Instructions
for Basic Training and Administration

SmartRideshare.com

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What Are Quick Instructions?

This document is a compilation of simplified, one- and two-page instructional sheets intended to help you quickly accomplish some of *SmartRideshare's* basic functions without having to wade through the larger Administrator's Manual.

Each instruction sheet has a header that refers to the Administrator's Manual chapter where you can find more detailed instructions and further discussion and explanation.

What Administrative Tasks Are Covered?

This document contains the following instruction sheets:

- Creating Organization/Employer and University Networks
- Creating a Worksite Network
- Changing a Worksite Address/Worksite Removal
- Pre-enrolling Accounts by Using Bulk Import
- Creating a New Account on Behalf of an Individual
- Approving Individual Requests to Join the Network
- Issuing a Passcode to Help Users Join the Network
- Adding Addresses or Locations for User Selection
- Viewing a User List
- Viewing Individual User Account Information
- Assisting Users with Account Access
- Assisting Users as a Proxy
- Posting Network Information to Users' Home Pages
- Posting Notifications to Users' Home Pages
- Sending System Email to a User Group
- Adding and Modifying Network-Wide Events

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Creating Organization/Employer and University Networks

Administrators who will be managing an Organization/Employer or University network **cannot initially create it**. You have to work with a Regional or other upper-level administrator to begin the process. The upper-level administrator must perform steps 1 and 2 below.

1. Establish the network's name and other details

1.1 Go to **Networks** in the navigation bar and select **Child Networks**.

1.2 Click **Add Network**.

1.3 In the box **Enter Network Details**,

a. Enter the name of the organization.
b. Optionally, type a website for the organization. Include the http://.
c. From the pull-down menu **Network Type**, select **Employer** or **University**.

2. Check to ensure the network is unique

2.1 Click the box **Check if exists** to search for and prevent duplicates.

a. If the network name or website is already in the *SmartRideshare* system, click **Exit.** Search for the existing network. If you find it, select it and edit it. If not, contact support@rideshareonline.com.
b. If the network name or website is not already in the system, the program moves to the **Enter Network Details** box, also accessed under **Settings**.

Configuring the Details of Your Organization/Employer and University Network

An upper-level administrator creating your network will follow steps 1 through 3 below to input a network short name and a method for joining your network, and then save the network. Then,

- You must register as a user with that network.
- The upper-level administrator will then grant you administrator rights for that network.
- You log in to the *SmartRideshare* Administrator's site.

You must then follow steps 1 through 3 below to input additional information.

1. Establish your network's name and other details

1.1 Within the network, click **Settings** on the navigation bar.

1.2 In the **Enter Network Details** box, enter the requested information.

a. Restrict matches within network: CAUTION: Retain **No** (the default) to allow network members to ridematch with commuters from outside their network. Select **Yes** to limit network members to *commute* ridematches only with other members of your network. You cannot change the network from restricted to unrestricted without help.

2. Establish contact information for your network

2.1 In the **Enter Primary Contact Details** box, type the name, email address, and phone number of the network administrator, which will appear on the users' Home page.

3. Choose how the user can become a member of your network

You may return later to update these options. (See Chapter 2 for a thorough discussion.)

In the box **Enter Association Details**, answer the question: **How does the user associate to the network?** by selecting one or more of the three options:

3.1 Select **Private email address with the network** only if users will have an email address issued by the organization associated with your network, and all people with that private domain name can be members of the network.

a. Skip to **Private Email Domain 1** and enter the organization's domain name (for example, @MyCompany.com).
b. Enter up to two other private domain names uniquely associated with your organization, if appropriate.

3.2 Select **Passcode** if some users will not be using an email domain name associated with the organization.

a. Skip to **Enter Passcode** and create a letter/number combination of up to 50 characters.
b. Distribute this passcode and instructions for joining the network to employees through a private and secure method.

3.3 Select **Admin will approve request** for the option to approve/reject individual requests to join the network.

a. Skip to **Authorizer name** and type the name of the person who will receive requests to join the network.
b. Enter the **Email address to receive affiliation requests.** Individual requests will go to this email address.

4. Complete the network configuration process

4.1 Click **Save** (or **Update**).

Creating a Worksite Network

Worksite networks can be added as child networks only within Organization/Employer and University networks, as well as upper-level networks. (For a thorough discussion of issues to consider before creating a Worksite, see Chapter 2.) Remember, also, that users can have an account with only one Worksite network.

1. Establish your Worksite network's name and other details

1.1 Under **Networks** in the navigation bar, select **Child Networks**.

1.2 Click **Add Worksite**.

1.3 In the box Worksite Details,

a. Enter the name of the building(s), business park, or campus as it is commonly known to employees or others.

> The recommended naming convention is ORGANIZATION–WORKSITE NAME. This will help users in searching for the correct sub-network.

b. Type a short name of fewer than 25 characters.

c. Optionally, type a website for the worksite.

d. Type an address for the worksite, including street number, city, and state. (Do not enter a zip code, which sometimes causes inaccuracies.) Note that this address cannot be changed once entered, so make sure it is correct and includes the zip code. Look at the map provided to ensure that the address is geocoding correctly.

> CAUTION: Fixing an address error is not trivial: you have to create a new Worksite network with the correct address and then contact support@rideshareonline.com to remove the incorrect network.

e. Type in the daily parking cost that the employer or organization bears per parking stall per day (required). If the cost is unknown, enter 0.

2. Establish contact information for your network

2.1 In the box Primary Contact Details, type the contact name, email address, and phone number of the network administrator. This information displays on the user's home page.

3. Complete network configuration

3.1 Click **Save**.

4. In case of a duplicate location

If the program finds that a Worksite network with the exact name you assigned already exists for the location/address you specified, then

4.1 Click **No, exit this screen.**

4.2 You may request administrator access to the existing Worksite network through the administrator of its parent network.

The occasion may arise when more than one organization may be sited at the same location (for example, one building containing multiple employers or agencies). In that case, two Worksite networks could have the same address, but they should not have the same name.

Changing a Worksite Network Address/Worksite Removal

Worksite network addresses cannot be edited. You must remove a Worksite network with an incorrect address and recreate it with the correct address. For a more complete discussion and cautions, see Chapter 2, Creating Your Network.

1. Rename the old Worksite network

1.1 Within your Worksite network, under **Networks** in the navigation bar, select **Settings**.

1.2 Rename the worksite "Delete—Worksite Name". Click **Save.**

2. Create a new Worksite network

2.1 Within the right parent network, create a new Worksite network with the correct address.

3. Run a User Registration Report

3.1 From within the old Worksite network, go to **Reports** and click on **User Registration Report**.

3.2 Enter a **Start Date** of 3/5/2010 to easily find all users associated to the Worksite, then click **View Report**.

3.3 Use the **Export icon** to export the report for your use.

4. Change the user's Worksite network

At this point, either email users and provide instructions for changing their worksite OR, optionally, proxy into users' accounts and change the worksite for them. You can modify the instructions below to email to your network members.

4.1 Using the exported User Registration Report as a guide, proxy into a user's account.

4.2 Go to the user's **Profile**>**My Locations**.

4.3 Follow *one* of the two procedures outlined below, as appropriate.

4.3A Link shows for Change Work/Campus Address

If the link Change Work/Campus Address appears to the right of the work address, then:

A1 Click **Change Work/Campus Address**.

A2 Check **I want to search using a name** and select the **new Worksite** network.

A3 You are finished and may exit the user's account.

4.3B "In Use" message shows for network address

If the message "In Use," appears next to the Worksite address, then:

B1 Delete ridematch trips

a. Go to **Ridematch**>**Manage your trips** and find trips that use the old Worksite address.

b. Write down or make a screen shot of the trip details.

c. Click on the **delete** icon to remove those trips. At the prompt, click **OK**.

B2 Delete Trip Log Templates

a. Go to the user's **Calendar**.

b. If the Unconfirmed Trips box appears, click **Close** at the bottom.

c. Click the **Trip Log Templates** link in the upper right corner of the screen.

d. Write down or make a screen shot of the trip details (for Vanpool, click on the **Edit** icon to get the van number).

e. Delete the template(s) by clicking the **X** icon. At the prompt, click **OK**.

B3 Assign the new Worksite network

a. Once the Worksite Address is no longer in use, go to the user's **Profile**>**My Locations**.

b. Click **Change Work/Campus Address** next to the work address.

c. Check **I want to search using a name** and select the **new Worksite** network.

B4 Recreate deleted ridematch trips and/or Trip Log Template(s)

a. Return to **Ridematch**>**Manage your trips** and/or the **Calendar** and recreate any trips or templates that you deleted.

b. You are finished and may exit the user's account.

5. Request support to delete the old Worksite network

5.1 Send an email to support@rideshareonline.com asking them to remove the "Delete—Worksite Name" Worksite network.

Pre-enrolling Accounts by Using Bulk Import

This process is applicable to Organization, University, Program, and SchoolPool networks. It requires that you already have prospective users' email addresses. It also assumes that in assigning Association Details when setting up your network, you selected Private Email Address with the Network.

1. Create a CSV File

1.1 Within your network, select **Users** from the navigation bar.

1.2 Click on **Import Accounts** at the bottom of the page.

1.3 Select **Click here to download CSV template** in the box Step 1: Upload CSV File (Import Account) to obtain a correctly formatted file called "ImportAccountTemplate.csv".

1.4 Save this file on your computer. Using your own spreadsheet software, fill in this file with potential users' names, email addresses, and phone numbers. Save the file in the CSV format.

2. Customize an email to users

2.1 Assuming you've been away to create the CSV file, within your network, select **Users** from the navigation bar.

2.2 Click on **Import Accounts** at the bottom of the page.

2.3 Click on **Configure import email** above the box Step 1: Upload CSV File (Import Account) to customize the email that will be sent to newly imported potential users.

2.4 Write a subject line and customized email content, such as additional information about your network.

2.5 Click **Save**.

2.6 Click **Go back to Bulk Import page**.

3. Import information from a CSV file

3.1 Click on **Browse,** within the box Step 1: Upload CSV File (Import Account), to find your CSV file to import

3.2 Click the **Upload** button.

4. Set imported account options

The box Step 2: Select Additional Fields appears. This assigns you an import ID number and gives you options for refining the imported data.

4.1 Choose how each user's **screen name** will be viewed by other users.

4.2 Select the appropriate **state**.

4.3 Select **Public** or **Private** for the users' profiles. Users can later change their preference to public.

4.4 Specify whether you want the system to **Ignore** a user with an email address that already exists in the system or **Associate the user with the network**.

4.5 Click the box **I am authorized to perform this import**.

4.6 Select the button **Preview Import** to ensure that the user data from the CSV file appear correctly. Select the option to complete the import process.

5. Preview the imported data

The box Step 3: Preview Accounts appears.

5.1 Select **Show all records** (default) or **Show only error records** to review the data.

5.2 If errors are present, click **Export all records to CSV** to export the results, fix the errors with your own software, and run the bulk import process again.

5.3 If the Preview shows no errors, click **Complete Import** at the bottom of the page. The *SmartRideshare* system sends your customized account registration email to the imported users.

5.4 Archive the CSV import file to track which users have been imported.

6. Check the import status

The Import Status box appears after you click **Complete Import**.

6.1 In the Import Summary box, click **More details** to check the data import status.

6.2 If errors were present in the CSV file, click the link **Show Records** to view the error records and make a new CSV file with correct information.

Creating a New Account on Behalf of an Individual

The process called *proxy administration* allows you to create accounts for users of Organization, University, Program, Division, Worksite, and SchoolPool networks.

> If the user has an email address, it is highly recommended that you encourage the user to create his/her own account. Accounts created by users are tracked by an automated update process that deactivates the accounts after 180 days of inactivity. The drawback with proxy registration is that accounts created this way are not included in the automated update process.

This process assumes that you have communicated with the prospective user about sign-up requirements, or are even speaking to them on the phone in real time, as you will need to enter information for them.

1. Register a new user

1.1 Within your network, select **Users** from the navigation bar.

1.2 Click on **Register a new user** at the bottom of the page.

1.3 In the box Provide Personal Information enter the user's

a. First name
b. Last name
c. State/Province
d. Language preference (English or Spanish)
e. Phone number

1.4 In the box Provide Account Information, the following entries are <u>required</u>:

a. A **password** (7 characters minimum, case sensitive. Standard practice is LastName plus last 4 digits of phone number. User may change later.)
b. Confirmed password
c. **Screen name** (The name the user will want other users to identify him/her by—not an email address. Note: The user **cannot** change this later.)
d. A **security question** (Make sure it's a question the user can answer; a standard proxy entry is, "What's my last name?" The user may change this later.)
e. The security answer

f. An **email address** (and confirmation) is not required but recommended if you have it.

1.5 Check the box **Calling in user**… to indicate that you have spoken to the user, and s/he agrees to the terms of use and privacy policy to use the site.

1.6 Click **Register** at the bottom right to complete the registration.

2. Access the user account

2.1 You may then click **Access user account** to manage the newly created account.

2.2 If you do so, you will go to the What are you here for? page.

2.3 To streamline entry, you may check only **I am looking to share a ride to an event/one-time trip**.

2.4 Insert the user's **home address**.

2.5 Click **Continue**.

2.6 You may also access the new account by going to **Users** on your navigation bar and clicking **Show All Members** or using the search boxes.

3. Notify the new user

If you entered an email for the user account, the *SmartRideshare* system sends the user an email message with a validation link. The user must click on the validation link before s/he can log into the account for any purpose, including changing the password.

If you did not have an email for the new user account, the user cannot log in.

Approving Individual Requests to Join the Network

Once users have completed their registration through an *SmartRideshare* system such as RideshareOnline, they can join your Organization, University, Program, or SchoolPool network by requesting authorization from the administrator. (This assumes that you selected **Admin will approve request** when you established your network.)

1. *User* sends a request to join the network

1.1 Under **Profile** in the Navigation bar, *users* select **My Networks**.

1.2 Clicking on **Join Network** will present them with a searchable list of networks.

1.3 They must click **Select** next to the desired network.

1.4 This will produce a window from which they can send you an email request. They click **I do not have an email address issued by the network**.

1.5 They must write an email describing who they are and why they are eligible to be a member of the network (name, title, department, etc.).

1.6 They click **Submit**.

1.7 The system sends you an email, and users see the requested network listed under **Profile>My Networks>Pending Network Enrollment**.

2. Receive an email generated by *SmartRideshare*

The person designated to give approval receives an email generated by *SmartRideshare*. The email contains 1) instructions to the administrator and 2) instructions for enrollment and a validation code intended for you to copy and forward to the requester.

3. Verify the eligibility of the requester

3.1 Verify that the requester is eligible to join your network.

4. Send an email to the new user

4.1 Send an email to the new user, forwarding the instructions for enrollment and the validation code.

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Issuing a Passcode to Help Users Join the Network

After users have completed their registration through an *SmartRideshare* system such as RideshareOnline, they can join your Organization, University, Program, or SchoolPool network by using a passcode. (This assumes that you selected and entered a **Passcode** when establishing your network.)

> Although not very effective when used as the primary method of allowing users to join a network, passcodes are often necessary as a supplemental method. If you choose to use a passcode, consider how the potential users will access information so that you can securely communicate the passcode.

1. Distribute the passcode to potential users

1.1 Use an electronic bulletin board, email, or other secure outreach method to communicate the passcode to potential users.

2. *Users* sign up with the passcode

2.1 Under **Profile** in the Navigation bar, users select **My Networks**.

2.2 Clicking on **Join Network** will present them with a searchable list of networks.

2.3 They click **Select** next to the desired network.

2.4 At the bottom of the window, they click **I have an enrollment passcode issued by the network** and enter that enrollment passcode.

2.5 Then they click **Submit.**

If the passcode is successful, the network will show up in the user's list of networks under **Profile**>**My Networks.**

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Adding Addresses or Locations for User Selection

Administrators of Organization, University, and SchoolPool networks can assign addresses for locations to/from which their network users frequently travel. Users can then select these addresses from a drop-down list when creating a ride match or logging trips in their calendars, making it easier for them to use the system. These addresses are *not Worksite networks*; rather, they may be conference sites, meeting places, or other commonly visited locations.

A. Add an address

1. Within your network, select **Addresses** from the navigation bar.

2. Click **Add Address** in the upper left corner.

3. Type in a street address and city for the location. If you don't know the address, you can double-click on the map to pinpoint the location. The system will fill in zip code and country.

4. Verify that the returned address is correct, including the state and zip code.

> CAUTION: Carefully check to ensure that the resulting address is correct. Once you have entered and saved a location address, you cannot change it, and although you can remove it, it will not disappear from users' existing address lists. If, in trying to correct an incorrect address, you remove it and then input the correct address with the same "friendly name," users will see the same friendly name twice on their address lists. Contact support@rideshareonline.com for help.

5. Enter a "friendly name" for the location, one that users will easily recognize, for example, "Washington State Convention Center," "Northgate Mall," "Kingsgate shopping center," "ACME Distribution center."

6. For **Show address by default**, select **Yes** to make the address appear in a drop-down list of location options when users enter information seeking a ride match or logging trips. The address will also be displayed to users as "Other Locations" under **Profile**>**My Locations**.

7. If you select **No**, then the address will not appear in the drop-down list, and users will have to type it in. The address will be recorded in the system, and you may later make a change to include it in the drop-down menu.

8. Click **Save Address.**

B. Change address information

You can change the “friendly name” for a particular address, but note that you cannot change the address itself.

1. Within your network, select **Addresses** from the navigation bar.
2. Click the desired address link.
3. Change the “friendly name” or drop-down menu status (**Show address by default**, **Yes** or **No**) as desired.
4. Click **Update**.

C. Remove an address

Note that although you can remove an address so that it will not appear on new lists, it will not disappear from users’ existing address lists. Also, if the address is for a Worksite, which can also be configured to appear on the drop-down address list, it cannot be removed.

1. Within your network, select **Addresses** from the navigation bar.
2. Click the box beside the address you wish to delete.
3. Click **Remove Address** in the upper right corner.

Viewing a User List

Administrators of Organization, University, and SchoolPool networks can view the entire list of network users by using the **Show all members** function. This list includes links to individual user's account information.

1. Within your network, select **Users** from the navigation bar.
2. In the upper left, click on **Show all members**.
3. Click on an underlined column title, such as **First Name**, **Last Name**, or **Email Address**, to sort the list alphabetically.

Viewing Individual User Account Information

1. Find a user account

<u>1.A All administrators</u>:

a. Within your network, select **Users** from the navigation bar.

b. In one of the **Look up a user** boxes, enter the user's email address, name (full or partial), or screen name.

c. Click **Get Details**.

<u>1.B Organization, University, and SchoolPool network administrators</u>:

a. Within your network, select **Users** from the navigation bar.

b. In the upper left, click on **Show all members**.

c. Click the network member's **First Name** link.

2. View the user account

2.1 Clicking **Get Details**, or the user's **First Name** in the Show All Members list, produces a comprehensive view of the user's account.

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Assisting Users with Account Access

1. First access a user's Account Details

1.1 Within your network, select **Users** from the navigation bar.

1.2 In one of the **Look up a user** boxes, enter the user's email, name, or screen name.

1.3 Click **Get Details**.

A. Validate a user account

If users have not validated their account by responding to the system email, then the validation link the system sent is visible in the user's Account Details box.

1. Copy the **Email Validation Link** into an email for the user.
2. Send the copied link to the email address shown in the Member Details box (through separate email). This will allow the user to confirm that the email address is correct.

If an email address is not correct, you can proxy into the user's account and go to **Profile**>**My Account**. At the bottom of the page is a link to change the email address. A validation link will be sent to the new address.

B. Unlock a user account

The system *locks* an account if a user makes ten successive, failed attempts to log in.

1. First verify the identity of the user.
2. Within Account Details, click **Unlock User**.
3. Ensure that the user knows his/her password or how to reset it. If the user does not know the answer to his/her security question, you can reset the password (see below).

C. Reset a user's password

Users who forget their password can normally reset it themselves by using their secret question.

1. First verify the identity of the user.
2. Within Account Details, click **Reset Password**.

3. Enter the user's email address, and the system will email a temporary password to the user. The user can change the temporary password (and security question) upon logging in.

D. Deactivate a user account

If an account is *deactivated*, then active ride matching trips are removed for all *SmartRideshare* networks and do not appear to other users. The system will deactivate a self-registered account if a user does not log in after 180 days. A user can reactivate his/her account simply by logging in.

1. Within Account Details, click **Deactivate User Account**.

(Note that if an administrator reactivates a user account, the last activity date is not updated. Therefore, the system will deactivate the account again.)

E. Disable/enable a user account

You can *disable* an account to quickly stop a user from utilizing the *SmartRideshare* system. Reasons for doing this might be abuse of the system or an obscene user name. You cannot *permanently delete* a user but can request help (support@rideshareonling.com) from a global administrator to do so. Only an administrator can re-enable an account that has been disabled.

1. Access Account Details.

2. To disable an account, click **Disable User Account**.

3. To enable an account, click **Enable User Account**.

F. Remove a user from your network(s)

You can remove a user from the network(s) for which you are an administrator. The person will be deleted from your network(s) but not from other *SmartRideshare* networks to which s/he belongs.

1. Access Account Details.

2. Find the **Remove from network** button.

3. If the button does not show, it means that the user has some active trips or Trip Log Templates.
   a. Click **Access User Account** and go to **Ridematch>Manage your trips** to remove a trip.
   b. Go to **Calendar>Trip Log Templates** to remove the Trip Log Template.

4. Return to the user's Account Details and click the **Remove from network** button.

G. Grant/revoke administrator rights

You can grant/revoke administrator rights only to your own network and its subnetworks.

1. Within Account Details, locate the box **Administrator Access Permissions**.
2. To grant administrator rights, click the **Grant** button next to the appropriate network(s).
3. To revoke administrator rights, click **Revoke** button next to the appropriate network(s).

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Assisting Users as a Proxy

You can access network users' accounts on their behalf in a process called *proxy functionality*. As their proxy, you can help with ridematching and other administrative tasks.

Note that you cannot access an account to act as a proxy for users who have administrator privileges. Users can also disable proxy access to their accounts by going to **Profile**>**My Account**.

1. Find a user account

1.1 Within your network, select **Users** from the navigation bar.

1.2 In one of the **Look up a user** boxes, enter the user's email address, name, or screen name.

1.3 Click **Get Details**.

2. Access the user's account as a proxy

2.1 Click on **Access User Account** at the far right of the Member Details box.

3. Operate within the account on the user's behalf

3.1 You arrive at the page **Profile**>**My Account** within the user's account.

3.2 Verify that you are in the correct account.

3.3 Navigate within the user's account and perform any *SmartRideshare* function available to the user as if you were the user. Note that this will not update the user's last activity date.

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Posting Network Information to Users' Home Pages

You can post images, links, and text to users' home pages that may include information about rideshare programs, incentives, contests, services, and more. These appear in a list on their home page, along with posts from other networks they belong to.

A. Create and add content

A.1 Within your network, select **Users** from the navigation bar.

A.2 Click on **Edit/View user home page content** in the Program Outreach box.

A.3 If you have no current submitted messages, you will see "No content exists for this network." Otherwise, you will see a list of content you have posted.

A.4 To add network information, click the **Add Content** link in the upper right.

A.5 Type a message of up to 1,500 characters and a title for that posting.

A.6 Click the Browse button to add an image located on your computer. For best results, the image should be in a .jpg, .tif, or .bmp image format and no larger than 100x100 dpi.

A.7 Click **Save Content** when you have finished entering the information.

A.8 Click **Back to Network Content List** in the upper right to return to Edit/View User Home Page Content. There you can see how your information will appear on the user's home page.

B. Edit content

B.1 Within your network, select **Users** from the navigation bar.

B.2 Click on **Edit/View user home page content** in the Program Outreach box.

B.3 Click **Edit** next to the appropriate post.

B.4 Change the content as desired, whether the text or an image

B.5 Click **Save Content**.

B.6 Click **Back to Network Content List** in the upper right to return to Edit/View User Home Page Content. There you can see how your information will appear on the user's home page.

C. Remove content

Content you post will remain visible to users until you remove it.

C.1 Within your network, select **Users** from the navigation bar.

C.2 Click on **Edit/View user home page content** in the Program Outreach box.

C.3 Click **Delete** next to the appropriate post.

C.4 Click **OK**.

The message will immediately disappear from the Network Content List, and it will also disappear from users' home pages.

Posting Notifications to Users' Home Pages

You can communicate with users by posting short, Twitter-style messages to their home page. The posts are listed in chronological order, with the most recent on top. Notifications expire and disappear after 30 days.

A. Create a notification

1. Within your network, select **Users** from the navigation bar.
2. Click on **Edit/View notification** in the Program Outreach box.
3. Click on **Add Notification** in the upper left**.**
4. Type in a message no longer than 140 characters. (Note that to be shown as a link, a website URL in the text must begin with *http://*)
5. Choose an appropriate category for your message.
6. Click **Add**.
7. Click **Return to Notification List**, at the lower left, to see your notice added.

The notification will appear immediately on the users' home pages, most recent on top, under **News Feed**.

(Note that you can also link your organization's Twitter account with you network through the *SmartRideshare* system. The resulting tweets will also appear on the users' News Feed. See Chapter 5 for more information.)

B. Change notifications

1. Within your network, select **Users** from the navigation bar.
2. Click on **Edit/View notification** in the Program Outreach box.
3. Click on the **edit icon** to the right of the appropriate notification to return to your message in the Add Notification box
4. Change the information.
5. Click **Save changes**.

Changes will be immediate, although the creation date will remain the same.

C. Remove notifications

1. Within your network, select **Users** from the navigation bar.
2. Click on **Edit/View notification** in the Program Outreach box.
3. Click on the **delete icon** to the right of the appropriate notification.
4. Click **OK** or **Cancel** in response to the confirmation box.

The notification will disappear immediately.

Sending System Email to a User Group

You can communicate with users by sending email through the *SmartRideshare* system that goes to all members of the network. If you have subnetworks, make sure that you begin from within the network with which you want to communicate.

A. Create a message

1. Within your network, select **Users** from the navigation bar.

2. Click on **Send email to user group for outreach** in the Program Outreach box.

3. Enter the required fields in the Email Content box:

    a. **From** (display name)
    b. **Reply to email address**
    c. Enter the email address to which users should reply. This is necessary because the email will be sent not from your email address but from the SmarthRideshare system.
    d. **Reply to display name**
    e. **Include users who have opted out**: The default is **No**. By selecting **Yes**, you choose to also deliver the email to network users who have opted out of receiving emails.

4. Enter the **Subject.**

5. Compose your **Email message. (**Note that all emails will begin with a salutation that includes the recipient's first name, such as "Dear John".)

6. Click **Send test email** when you are satisfied with your email. The test email is immediately sent only to the **Reply to email** address you entered above.

7. Use the drop-down menu in the User Groups box to send the email to **All** network users.

8. For immediate delivery, click **Send email now** in the Send Options box
   OR
   Click **Schedule email for a later date** to choose a different date for delivery.

9. Click **Submit** to complete the process.

B. Cancel scheduled outgoing emails

If you have selected **Schedule email for later date** for any of your emails, you can cancel their delivery before they are sent. Note: if you need to *edit* a scheduled email, you have to cancel the current email and re-enter the information for a new email.

1. Within your network, select **Users** from the navigation bar.
2. Click on **Send email to user group for outreach** in the Program Outreach box.
3. Click on **Manage Scheduled Emails**. The Manage Scheduled Emails box contains a list of upcoming outgoing emails.
4. Click **Cancel** to the right of the appropriate email.
5. Click **OK** in the confirmation box to delete the email.

Adding and Modifying Network-Wide Events

When you add notices of network-wide events, user see them by going to **Events**>**View Events** in their accounts. There, they can add a ridematch trip request for each event.

A. Add an event

1. Within your network, select **Events** from the navigation bar.

2. Click **Add Event** in the upper left corner.

3 . In the Event Name box, type in an event name, the host/organizer, and a website URL if appropriate. (The URL must include http://. Use a "friendly" URL rather than a long string that is difficult to retype.)

> For this event to be associated with the **Event widget**, you must include the URL (the host name, such as http://www.mydomain.com) for the website on which you have installed the Event widget.

4. In the Event Location box, type in a venue name and a street address and city. Enter a state if other cities are similarly named. The system will fill in zip code and country. Double-check the map for location accuracy.

5. In the Event Schedule box, you have three options (see Chapter 6 for a thorough discussion):

   5.1 Select **One Time** to input dates and times for an event that will occur just once. Type in dates (mm/dd/yyyy) or click the calendar.
   Select times from the drop-down menus.

   5.2 Select **Seasonal** to enter dates for an event that occurs continuously throughout a season.
   Type in dates (mm/dd/yyyy) or click the calendar.

   5.3 Select **Recurring** to input multiple occurrences of related events; the program creates a separate event for each occurrence.

   a. For the first occurrence, type in dates (mm/dd/yyyy) or click the calendar and select times from the drop-down menus

   b. Then click **Add**.

   c. Continue entering and adding information for each event occurrence.
   Use the **Delete** link to remove an event occurrence if necessary.

6. In the Additional Information box you can click **Browse** to upload images and logos from your computer to accompany the event notice. The file must be in a .jpg, .tif, or .bmp image format and no larger than 120x120 pixels.

7. You can also add a description of the event, using a maximum of 250 characters.

8. Click **Create Event**.

B. Modify an event

Note: You cannot modify an event location. If you have assigned the wrong location, you must remove the upcoming event (see below) and create a new one.

1. Within your network, select **Events** from the navigation bar.

2. Click **Modify** next to the appropriate event.

3. Enter the modified meeting information.

4. Click **Update Event**.

C. Remove an upcoming event

1. Within your network, select **Events** from the navigation bar.

2. Click **Cancel** next to the appropriate upcoming event.

3. Enter text explaining the reason for the cancellation. This explanation will be emailed to users who have added a ridematch trip request for the event.

4. Click **Cancel Event**.

The event will immediately disappear from users' Events lists. If users have added a ridematch trip request for the event, the system will send an automatic email about the cancellation. The associated ridematch trips (shown to users under Ridematch>Manage your trips) will also include "Cancelled" next to the event name.

D. Remove an expired event

The *SmartRideshare* system periodically removes events that have expired from the system as well as ridematching trips created for expired events.

1. Within your network, select **Events** from the navigation bar.

2. Click **Remove** next to the appropriate expired event.

3. Click **OK**.