# MarchingOrder Website Quick-Start Guide

Your Data Collection website is setup, and ready to GO!

Log-in to your account at http://admin.marchingorder.com/ and complete the steps below to get your site live and open to graduates. The website has been pre-configured, so mostly you will just need to confirm what is already there.

## 1. Edit Ceremony Settings

*Instructional Video: Edit Ceremony Settings*

**CEREMONIES**
Review, manage and edit all ceremonies for this ceremony period

- From the admin homepage, click "Ceremonies" and then click the blue edit button. Confirm your basic ceremony settings – if you hover over a question mark, it will give you more information about each field.
- Next, navigate to the "Website" tab and click the "Registration Form" tab. We have populated stock verbiage at the top of the page, which you can leave as is, or edit if needed.
- The "Create your Personal Graduation Slide", "Phonetic Pronunciation" and "SayItRight" sections have been created for you.
    - To make verbiage edits to sections or questions, use the pencil icon.
    - If you make a change, save the question, then be sure to scroll to the bottom of the page and SAVE the registration form.

## 2. Edit Email Templates

*Instructional Video: Edit Email Templates*

**COMMUNICATION MANAGER**
Create and manage your email and text campaigns associated to this ceremony period

- From the admin homepage, click "Communication Manager" and then click "Manage Templates". **Note:** do not edit any hyperlinked text or text with an "@" symbol – these are placeholders for grad-specific text.
- Review the "Add Graduate to Website" template. This email is triggered when graduates are added/imported to the website – make sure to edit this template before importing graduates.
- Review "Graduate Submitted Form" template. This is triggered when a graduate submits the form.
    - **Note**: Any text with an @ or hyperlinked is a placeholder, which will carry in graduate specific information when the email is sent – DO NOT edit these portions of the email template.

## 3. Confirm Graduate Data Fields

*Instructional Video: Confirm Graduate Data Fields*

**GRADUATE DATA FIELDS**
Create and manage additional data collection opportunities

- o This represents the data that you will be importing to the site. It is <u>very important</u> that you upload all data that is needed:
  - Anything shown on the graduate slide (e.g. Degree)
  - Anything needed to filter grad slides with a dropdown on your virtual ceremony page (e.g. College)
    - For any fields being used as filters, you must enter all allowed values using the "+Add multiple answers" button under Options.
- o From the admin homepage, click "Graduate Data Fields". If the pre-set fields account for all items listed above, no action is needed. If you need to add an additional data field, click "Add Field", name the field, and then click "Save" – it will now be included on your data import template.

## 4. Import Graduates

*Instructional Video: Import Graduates*

**GRADUATES**
Detailed information on ceremony state and performance including reponse rates and ticket usage

- o Prior to importing, you can view the website as a graduate –
- o Click "Graduates" from the admin homepage and search for "aaa" (this is a test graduate) - click the blue edit button and then click the "Login as Graduate" button (top-right). You may need to enable popups if this doesn't work immediately.
- o When you are ready to import, click "Graduates", and then the "Add" tab. Under "Import from Excel/CSV", click the "Excel Template" button to download your data template.
- o **Note**: for a successful import, your data headers **must exactly** match the data template. It is easiest to paste data directly into the template.
- o The fields highlighted in pink are required (including FULL Name)
  - o If your data does not contain a full name field, you can paste the following excel formula into cell E2 to populate full name:
    =CLEAN(TRIM(CONCATENATE(B2," ",C2," ",D2)))
- o Once your Excel is ready for import, click "Upload Excel" under the "Import from Excel/CSV". Browse to select your data template and click "Upload".
- o Select the appropriate ceremony from the "Ceremony to Import Grads to" drop-down, and then click the "Import Graduates" button.

## 5. Add Administrators

*Instructional Video: Add Administrators*

**USER ADMINISTRATION**
Manage administrator user account identities associated with your school account

- o You will want to add any administrators that will be helping with the website (e.g. helping to validate photos and messages).
- o Click "User Administration" -> "Add Administrator"
- o Enter the user's information; most admins can be set as "School Administrator" type. If you want the admin to have access to only specific ceremonies, choose "Ceremony Administrator" and then select the ceremonies to which they should have access.