MISSION WISE Building Healthier Nonprofits™

A DIVISION OF COMPREHENSIVE HEALTH EDUCATION FOUNDATION

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Help

Announcements

The announcements module helps the consultant director communicate with clients and consultants. Please choose from the following topics:

Adding announcements (Consultant Director)
Editing announcements (Consultant Director)
Deleting announcements (Consultant Director)

Adding announcements (Consultant Director)

NOTE: This feature is not available to consultants and clients. Please contact the consultant director about adding announcements.

1. To add an announcement, go to any page that displays the type of announcement you want to add. If you're logged in as the consultant director, **Add new announcement** appears under the announcement section. Click **Add new announcement** and the **Edit Announcements** page appears.
2. Enter your announcement information on the **Edit Announcements** page. Here are some tips:
    - **Title:** The text you enter in the **Title** box will be the headline.
    - **Link:** If you want the announcement to link to a web page, select the appropriate option under **Link Type**. Options will appear so that you can enter or select the link address.
    - **Track/Log/Open:** Leave these defaults as-is.
    - **Expires:** If your announcement is time-sensitive, you can set an expiration date and the announcement will disappear when it's no longer relevant. This saves you the trouble of deleting it. (Ex: You can set an announcement about a Jan. 13 event to expire on Jan. 14.)
    - **View Order:** Normally, the most recent announcement appears on top. If you want to change the order of the announcements, put a number in this box. (Ex: To make this the second announcement, enter **2**.)
3. To save the announcement, click **Update**.

Editing announcements (Consultant Director)

NOTE: This feature is not available to consultants and clients. Please contact the consultant director about editing announcements.

1. To edit an announcement, go to any page that displays that announcement. If you're logged in as the consultant director, the **Edit** icon (blue pencil) appears next to the headline. Click the **Edit** icon and the **Edit Announcements** page appears.
2. Make changes as needed. To save your changes, click **Update**.

Deleting announcements (Consultant Director)

NOTE: This feature is not available to consultants and clients. Please contact the consultant director about deleting announcements.

1. To delete an announcement, go to any page that displays that announcement. If you're logged in as the consultant director, the **Edit** icon (blue pencil) appears next to the headline. Click the **Edit** icon and the **Edit Announcements** page appears.
2. Scroll down to the bottom of the page and click **Delete**. A confirmation window appears. Click **OK**.

Calendar

The calendar module helps clients and consultants coordinate meetings and milestones. Please choose from the following topics:

Adding calendar events (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about adding events to your calendar.

1. To add a new calendar event, click the arrow next to the calendar name (see figure). On the menu that appears, select **Add Events**. The **Edit Events** page appears.

2. In the **Event Settings** area, enter your event information. Here are some tips:
    - **Title:** The text that you enter in the **Title** box will appear in the calendar as the link text.
    - **Audience:** If you want this event to be posted to multiple calendars, use the **Category** list to choose the appropriate audience (**All Clients**, **All Consultants**, etc.). If you choose **None**, the event will be posted to this calendar only.
    - **Repeating Events:** If your event is recurring, click the **plus sign** (+) next to **Recurring Settings** to open this area and adjust those settings.
3. To save the event, click **Update**.

Editing calendar events (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about editing calendar events.

You can only edit an event that you have created. To check the creator of an event, click the event link in the calendar. At the bottom of the **Calendar Event Detail** page, look for **Created by…**

1. To edit a calendar event, click the DATE of the event, not the event title (see figure--click the 12). A link to the event appears below the calendar with an **Edit** icon (blue pencil).

2. Click the **Edit** icon for the event you want to change. The **Edit Event** page appears.
3. Make changes as needed. To save your changes, click **Update**.

Deleting calendar events (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about deleting calendar events.

You can only delete an event that you have created. To check the creator of an event, click the event link in the calendar. At the bottom of the **Calendar Event Detail** page, look for **Created by…**

1. To delete a calendar event, click the DATE of the event, not the event name (see figure--click the 12). A link to the event appears below the calendar with a **Delete** icon (red x).

2. Click the **Delete** icon for the event you want to change. The following message appears, "Are you sure you wish to delete this entry?" Click **OK**.

Exporting calendar events to Outlook (Clients, Consultants)

1. To copy a MissionWise calendar event to your Outlook calendar, click the TITLE of the event. The **Calendar Event Detail** page appears.
2. On the right side of the **Calendar Event Detail** page, click **Export to Personal Calendar**. The **File Download** box appears.
3. Click **Open**. An **Appointment** box opens with the relevant event information filled in. To save the event, click **Save and Close**.

Contacts

The contacts module provides a quick reference of current contact information. Please choose from the following topics:

Adding contacts (Consultants)
Editing contacts (Consultants)
Deleting contacts (Consultants)

Adding contacts (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about adding contacts to your page.
1. To add a new contact, click **Add New Contact** in the area below the **Contacts** section. The **Edit Contacts** page appears.
2. Add the contact information. To save the new contact, click **Update**.

Editing contacts (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about editing contacts on your page.
1. To edit a contact, click the **Edit** icon (blue pencil) for that contact. The **Edit Contacts** page appears.
2. Edit the contact information as needed. To save your changes, click **Update**.

Deleting contacts (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about deleting contacts on your page.
1. To delete a contact, click the **Edit** icon (blue pencil) for that contact. The **Edit Contacts** page appears.
2. Scroll down to the bottom of the page and click **Delete**. A confirmation window appears. Click **OK**.

Documents

The documents module helps clients and consultants share samples, drafts, and other resources. Please choose from the following topics:

Adding documents (Consultants)
Opening documents (Clients, Consultants)
Saving documents to your computer (Clients, Consultants)
Deleting documents (Consultants)

Adding documents (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about adding documents to your page.
1. To add a document saved on your computer, click **Add New Document** in the area below the **Documents** section. The **Edit Documents** page appears.
2. In the **Title** box, enter a user-friendly title. This will appear in the documents list as a link to the file.

3. In the **Link Type** list, select **File**.
4. In the **Link** area, click **Upload New File**. The **Browse** button appears.
5. Click the **Browse** button. The **Choose File** window appears.
6. Select the directory and file name, then click **Open**.
7. To save your changes, click **Update**.

Opening documents (Clients, Consultants)

1. To open a document, click the document title or **Download**. The **File Download** window appears.
2. Click **Open**. The document appears in your browser window.
3. To return to the MissionWise site, click **Back** in your browser menu.

Saving documents to your computer (Clients, Consultants)

1. To save a document to your computer, click the document title or **Download**. The **File Download** window appears.
2. Click **Save**. The **Save As** window appears.
3. Select a directory and file name, then click **Save**. The **Download Complete** window appears.
4. To close the **Download Complete** window and return to the MissionWise site, click **Close**.

Deleting documents (Consultants)

NOTE: This feature is only available to consultants. Clients, please contact your consultant about deleting documents from your page.

1. To delete a document, click the **Edit** icon (blue pencil) next to the document title. The **Edit Documents** page appears.
2. Scroll down to the bottom of the page and click **Delete**. A confirmation window appears. Click **OK**.

Forums

The forums provide an online meeting place to facilitate communication for all users. Please choose from the following topics:

Adding a new thread (Clients, Consultants)
Replying to a post (Clients, Consultants)
Editing your post (Clients, Consultants)
Changing your forum settings (Clients, Consultants)

Adding a new thread (Clients, Consultants)

NOTE: The **New Thread** button appears next to **My Settings**. If you are in a section of the forum that doesn't have this button, you do not have permission to add a thread in that section.

1. To add a new forum thread, click **New Thread**. The **Add/Edit Post** page appears.
2. Enter a descriptive title in the **Subject** box. This will become the link to your thread.
3. Enter the body of your post in the large, blue content area.
4. Select from the following options as needed:
   - **Attachments:** To add an attachment, click the **Insert Attachments** icon (magnifying glass/folder) next to the **Attachment** box. A series of windows appear. Click **Browse**, select the file, then click **Open**. Click **Add** to load the file. When you're done adding attachments, click **Upload**, then click **Save**.
   - **E-mail Notification:** To receive an e-mail when someone replies to your post, select the **Notification** check box.
5. To save your new thread, click **Update**.

Replying to a post (Clients, Consultants)

NOTE: The **Quote** and **Reply** buttons appear on the right side of the page, in the same area as the post's title. If a post doesn't have these buttons, it is locked and you cannot reply to it.

1. Choose whether you want your reply to include a quote from the earlier post. To reply with a quote, click **Quote**. To reply without a quote, click **Reply**. Either way, the **Add/Edit Post** page appears.
2. The **Subject** line is already filled in. Enter the body of your post in the large, blue content area. (If you chose **Quote**, the quoted text appears at the top of this area.)
3. Select from the following options as needed:
   - **Attachments:** To add an attachment, click the **Insert**

> > **Attachments** icon (magnifying glass/folder) next to the
> > **Attachment** box. A series of windows appears. Click **Browse**,
> > select the file, then click **Open**. Click **Add** to load the file.
> > When you're done adding attachments, click **Upload**, then
> > click **Save**.
> > - **E-mail Notification:** To receive an e-mail when someone
> >   replies to your post, select the **Notification** check box.
> 4. To save your reply, click **Update**.

Editing your post (Clients, Consultants)

NOTE: You can only edit your own posts. The **Edit** button appears on the
right side of the page, in the same area as the post's title. If a post doesn't
have this button, you do not have permission to edit it.

1. To edit a forum post, click **Edit**. The **Add/Edit Post** page appears.
2. Edit your post.
3. Select from the following options as needed:
   - **Attachments:** To add an attachment, click the **Insert
     Attachments** icon (blue magnifying glass) next to the
     Attachment box. A series of windows appear. Click **Browse**,
     select the file, then click **Open**. Click **Add** to load the file.
     When you're done adding attachments, click **Upload**, then
     click **Save**.
4. To save your changes, click **Update**.

Changing your forum settings (Clients, Consultants)

1. To change your forum settings, click **My Settings**. The **User Settings**
   page appears.
2. There are four categories of settings. Click the **plus sign** (+) next to
   the category name to see all of the options in that category.
   - **General Information:** This information is taken from your
     account profile. The only thing you can change in this section
     is the option to display or hide your email address.
   - **User Profile:** This category is available for you to add your
     instant messaging user name(s) and/or tell other users more
     about yourself.
   - **User Settings:** This category allows you to change how you
     view the forums and add a signature to all of your posts.
   - **Tracking/Subscription:** This category allows you to choose
     your default forum, set up e-mail notifications for selected
     forums, and change your **What's New** settings.
3. To save your new settings, click **Update**.

System Requirements

MissionWise.org is best viewed using the latest industry-standard
technologies listed below. If you have problems viewing our site, please
confirm that your system meets these requirements.

Supported Operating Systems
Windows® XP, Windows® 2000, Windows® ME, Windows® NT (Windows
XP recommended)

Supported Web Browser
Our site is best viewed on Microsoft® Internet Explorer® 6.0. While other
browser and operating system combinations may work, this site is
developed, tested, and supported for Microsoft Internet Explorer 6.0 running
on a Windows XP operating system.

Animated Content
To view animated content, your browser must include the Macromedia
Flash™ Player (version 6.0 or higher). Download the latest version of
Macromedia Flash Player for free.

Menu Script
Active Scripting must be enabled in order to view and navigate the main
menu.

PDF Files
Some files are displayed in PDF format. To view these files, you will need a
PDF reader such as Adobe® Acrobat® or Adobe® Reader® version 6.0 or
higher. Download the latest version of Adobe Reader for free.

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