MyTDX.org: A User Guide
Alumni Associations and House Corporations

powered by GreekTrack©

Version 2.0

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General Information and FAQs about MyTDX.org powered by GreekTrack©

Who is this document for?
> This document is design to be a "How to" guide for Charges and Associations. It provides step-by-step procedures to do most of the commonly used functions by officers of those groups.

What is MyTDX.org (powered by GreekTrack©)?
> MyTDX.org is a member only portal. Only initiated members of Theta Delta Chi have access to this portal. Once you have registered, you are able to:
> - Manage your personal membership information (Profile)
> - Determine your communication preferences
> - Review your donation history
> - Communicate with brothers in both your Charge and throughout the world
> - Participate with your Alumni Association
> - Contribute to the longevity of your Charge through completion of your family tree
> - Communicate directly with undergraduate members
>
> Your personal information will not be sold or given to outside businesses for solicitation purposes by Theta Delta Chi Fraternity, the Educational Foundation or the Founders' Corporation.

Why was GreekTrack chosen?
> GreekTrack was chosen because of the ability it offered Theta Delta Chi for full customization and integration of most of its operations. It is not a "one-size-fits-all" management tool but it offers a high degree of customization. They continue to develop tools to manage member services and then customize those tools to meet our specific needs. GreekTrack also offers ongoing customer support and training with quick turn around and trouble shooting capabilities.

What is the cost to me?
> There is no cost to individual members to register and use MyTDX.org. This is a service provided by the major entities of the Fraternity; the Grand Lodge, The Educational Foundation and the Founders' Corporation.

I am an alumnus, why can't I join the "Alumni Association" portal for my Charge?
> You are forever a member of your Charge, first and foremost. The Alumni Association and House Corporation portal is designed for JUST the officers of those organizations. If you are a member of your Alumni Association but NOT a member of the Association Board you will not have access to that group. Once elected to a position on that board you will have officer status and be able to use the features in that section of MyTDX.org.

SETTING UP AND UPDATING YOUR PROFILE

Once you have registered and logged into MyTDX.org you need to verify your profile and provide any missing information that would be helpful to maintain contact with Theta Delta Chi and your Charge. You will also be able to let the Central Fraternity Office (CFO) know how you prefer to be contacted.

1. Once you have logged in, **click on your name** in the upper right corner of the page to begin the process of updating your profile and preferences.

CHECKLIST OF ITEMS TO SETUP or UPDATE:

- ☐ Make sure your **Member Information** is correct -please, no nicknames
- ☐ Add your preferred name – this is where you can add a name that replaces your first name
- ☐ Next, update your **Contact Preferences** – this will let us know how you prefer to be contacted by both your Charge and the CFO
- ☐ By completing the **Education History**, you will be able to allow others to connect with you via your various alma mater.
- ☐ When completing your **Work Experience** you become part of the career networking tool within MyTDX.org
- ☐ The **Profile Information** is where you can update or add email addresses, phone number, home address, information about your participation in your Charge or at the international level and to let us know how you would like to receive The Shield magazine.
- ☐ FINALLY, make sure you click the **Update Profile** button at the bottom of the page

2. Remember to click the [Update Profile] link at the bottom of the page to save your work.

BUILDING YOUR FAMILY TREE

Building your family tree is an opportunity for you to help build your Charge history.

1. Return to your **Edit Profile Information** page by clicking your name in the upper right corner of the page
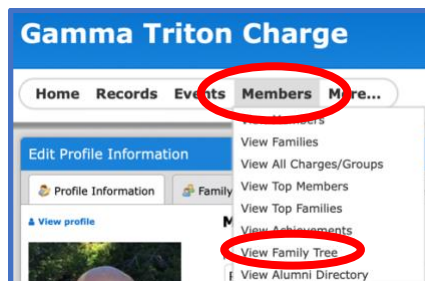

2. At the Top of the **Edit Profile Information** page click **Family**.
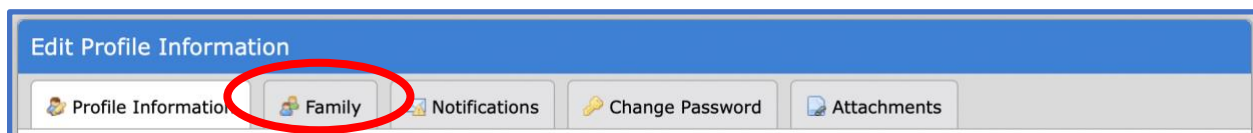
3. Fill in the names of your **Big** and **Little** and then click **Add**

4. As you add your "Family" information, a Charge Family tree is built. From the tabs at the top of the MyTDX.org page, scroll your cursor over the **Members** tab and select **View Family**

SEARCHING FOR A BROTHER

Building and maintaining positive relationships with our brothers is a central theme of being a Theta Delt. As our Founders stated, "a friendship founded on mutual esteem and dependance," "an honorable and confiding friendship," are expressed within the Preamble. MyTDX.org allows use to locate and connect with one another directly from the portal.

There are two ways to locate a brother within MyTDX.org. The general search bar will search the entire Theta Delta Chi database, while the second will allow you to view just your specific Charge roster.

1. The easiest is to click in the **Search** bar and type his name. This will search all members in the Theta Delta Chi database.
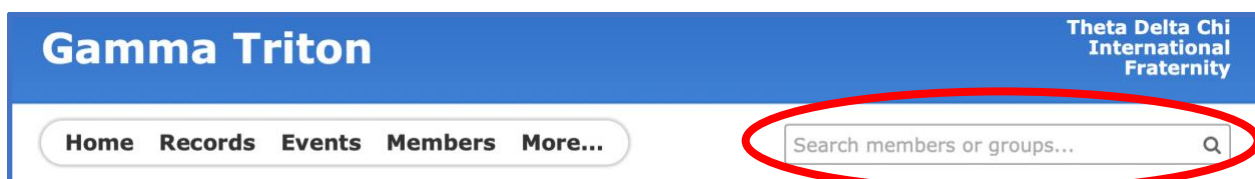
2. The second is to click on the **Members** tab if you are only searching for a member of your Charge. You will then be able to specifically view just your Charge roster.
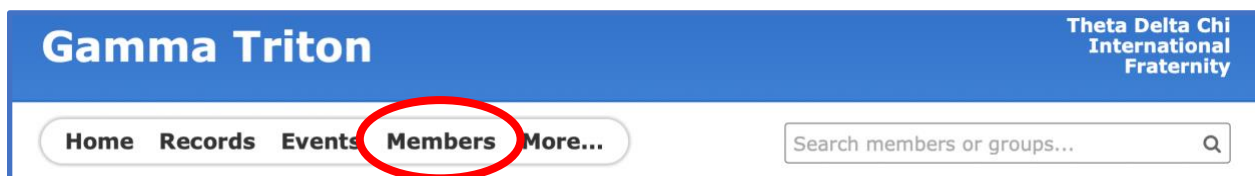
EMAILING ANOTHER BROTHER

MyTDX.org allows you to email another brother directly out of the portal. This email will go to directly to the email address listed in the profile. They will not need to log into MyTDX.org to access their messages.

1. After using the **Search** bar or the **Member** option to find a brother. Click on their name to view his profile page, click on the **Send Message** button on the far right of the page.

DONATING TO THE EDUCATIONAL FOUNDATION

MyTDX.org makes it easy for you to support the educational and philanthropic endeavors of our Charges. Donating to the Educational Foundation allows Theta Delta Chi to:

- Provide scholarships to both undergraduate and alumni members of our organization.
- Support the annual leadership program of the Fraternity, the Preamble Institute
- Fund educational programing at Convention such as Minerva Sessions
- Offer grants to individual Charges to support their philanthropic and service projects such as the Bros. UniteD program and the conduct fundraisers for the Doug Flutie Jr. Foundation, our philanthropic partner.
- Offer grants to support educationally related projects at Chares such as hosting speaker programs, technology infrastructure at Charge houses, and individual educational programs.

1. After logging into MyTDX.org, you will land on the **Welcome** page with your name
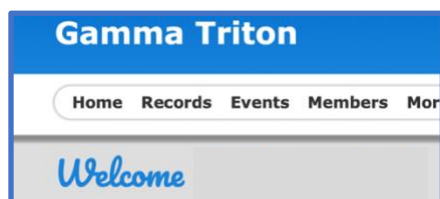
2. On the left side of the page, you will see a white box labeled, Give Back – Thank-you! Click the **Donate** button and follow the prompts.
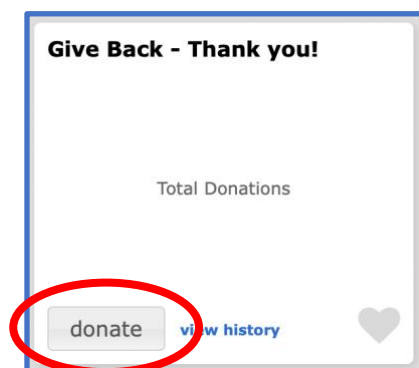
FINDING SUPPORT DOCUMENTS

MyTDX.org allows for the storage of documents created by the Charge, Alumni/House Corporation and the CFO. Among the types of files available are:

- Alumni Resources: Sample Bylaws, procedures for establishing an alumni association, and Charge Advisor Support manuals
- Newsletters: the CFO publishes a monthly undergraduate newsletter
- the Shield magazine: digital versions of all Shields from the fall of 2006 to the most current edition
- Minutes: Charges are encouraged to post meeting minutes, budgets, Bylaws and other related documents

1. From your home page, place your cursor over the **More** tab and then select **Files**
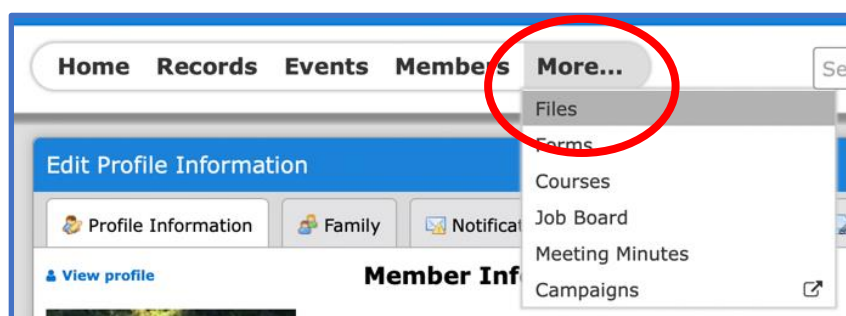
2. Once in the files section, select **Files Shared by Staff** to access files created by the CFO
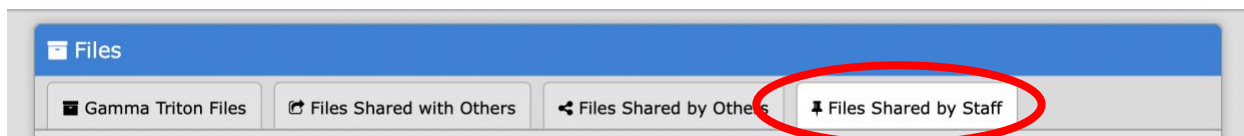
3. To locate files created by the Charge select the **(Charge Name) Files**
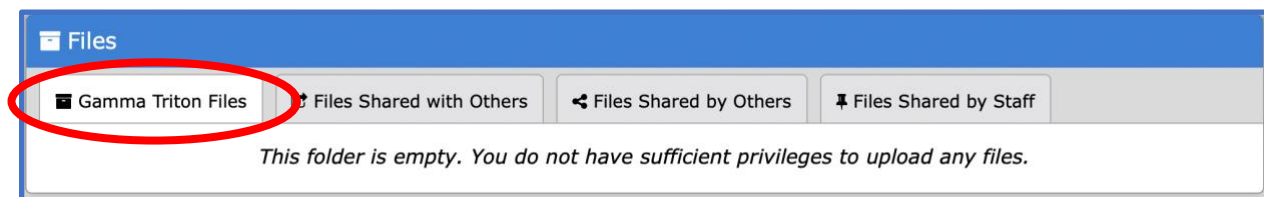
Charge and Association Operations

INTRODUCTION

This section of the user's guide is devoted to operations and functions primarily used by Charge and Association officers. They include:

- Onboarding your officers
- Group email communications
- Newsletter creation
- Forms and surveys
- Document management
- Invoicing
- Data export
- Calendar functions

ONBOARDING YOUR OFFICERS

When onboarding Charge and Association officers you will be able to determine Officer Positions, linked to the brother occupying that position and to determine the Privileges associated with each officer. It is highly recommended that the list of officers includes all of the elected and appointed positions and chairs.

In addition to the usual, **president, secretary** and **treasurer** you should consider chairs or officers such as:

- Recruitment Chair
- New Member Educator
- Alumni/Undergraduate Liaison
- Social Chair
- Communications Chair
- Service and Philanthropy Chair
- Alumni Officer
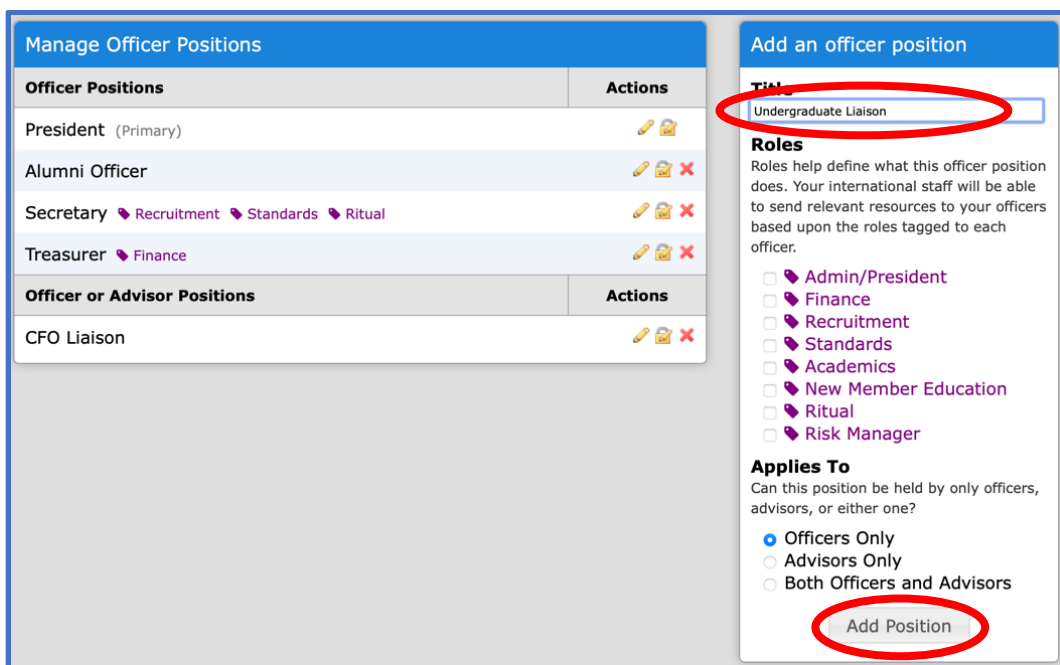
1. Once you have logged in, go to the down arrow to the right of your name and select your Alumni Association or House Corporation name.
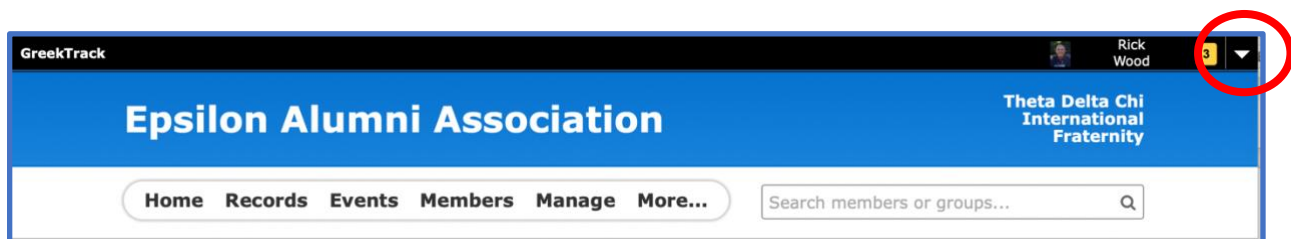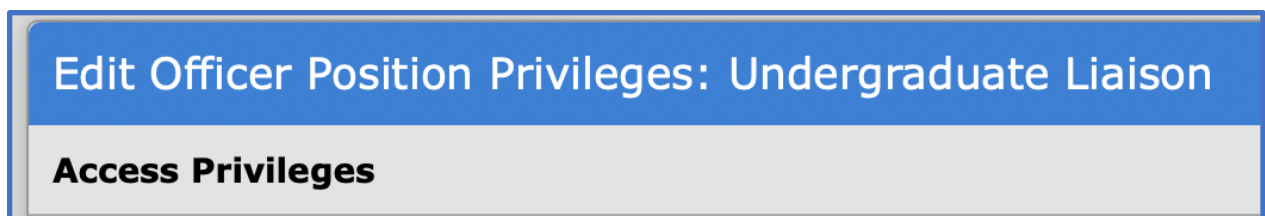
2. If you need to set up your officer positions for your Charge or alumni association, scroll over the **Manage** tab and select **Officer Position & Privileges** to set up your board structure.
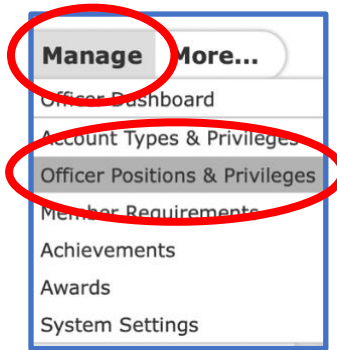
3. This is where you will add officer positions such **Undergraduate Liaison.** You will determine what types of tags this officer will have. Remember to click the [Add Position] button at the bottom of the **Add an officer position** box.

4. After you click the Add an officer position, you will be presented with a box that will allow you to assign officer privileges. You will be able to determine what each officer position will be able to do within MyTDX.org.


5. Please remember to click the [Update Privileges] button before moving on.

6. Once the officer/chair position has been set up and privileges have been determined you can now assign a brother to that position. At the top of the page, click on the **Assign Members to Positions** tab.

7. Across from the officer position, type the name of the officer holder and the system will locate him.
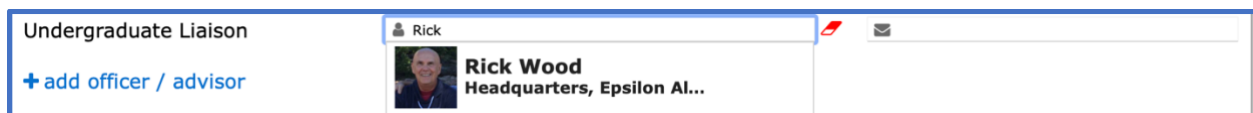
8. You will then be able to add the names of your officers. Once changes have been made, remember to go to the bottom of the page and click the button.
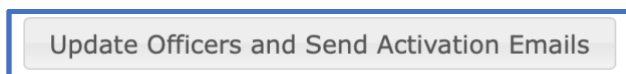
GROUP EMAIL COMMUNICATIONS

Sending group emails is a great way to communicate with all of your Charge brothers at one time. However, this is not a time for every officer to send their own separate group emails. No one wants to see their inbox blow up with separate emails when one consolidated email would suffice. Some best practices to consider:

- Designate a single brother to manage sending group emails
- Limit the frequency of communications
- Consolidate news posts into one email
- Determine a vetting process for sending group emails
- Emails should be short and to the point, minimizing opinion or speculation
- If you are asking the group to do something, be clear and brief about the action and timeframe
- If sending a link, also provide a *short* summary about the relevance
- Use a descriptive subject line especially if action is needed

1. Click on the **Manage** button and then, click the [☑ Email] button.
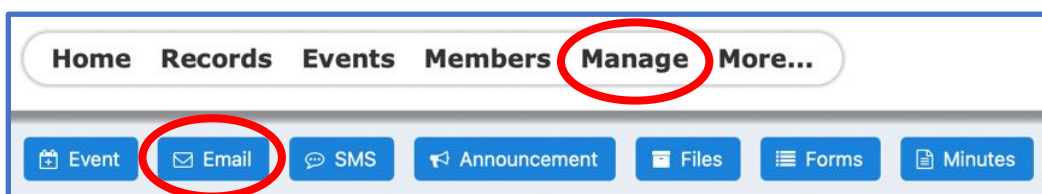
2. Click on the [Compose Email] button.
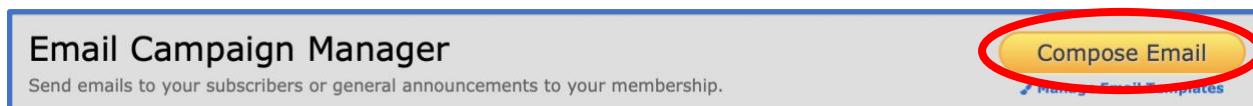
3. From here you can select who you will be sending group emails to and then draft your email and send it out to your chosen audience.

   NOTE: if you want to send the email to just all of your alumni or just active members, **DO NOT** select Email members of (Charge) Alumni Association. Select **Email members of associated Epsilon Charge** and then select **Alumni**. When selecting members of (Charge) Alumni Association, you would actually be selecting just the officers of that group. (See graphic below)

4. Once you select, [Continue] you will be able to determine the subject line, then move on to composing your email, previewing your email and finally sending it to the selected group.

NEWSLETTER CREATION

One of the most effective ways to maintain good communication with alumni and undergraduates alike is to create and publish a regular newsletter. These newsletters can include pictures, news items, information about upcoming events with the ability to register and links for payment. It might also be a good idea to combine an undergrad and alumni newsletter. Frequent, quarterly, newsletters can help to maintain momentum for the Charge, keep everyone informed, continue to maintain relationships and encourage participation.

1. Before beginning to create a newsletter, gather all of the pictures, text, forms and links you want to include in your newsletter.

2. Click on the **Manage** button and then, click the [☑ Email] button.
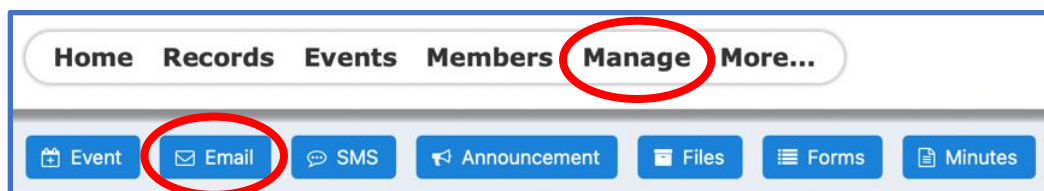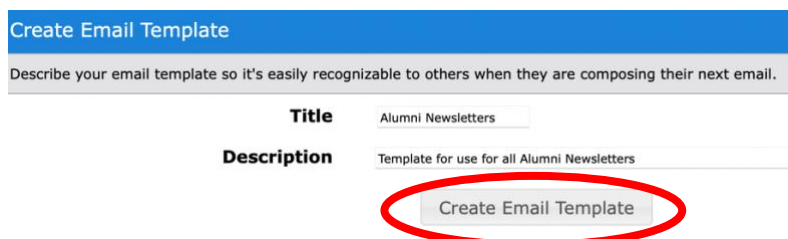
3. Select the **Manage Email Template** link, just below the [Compose Email] button.
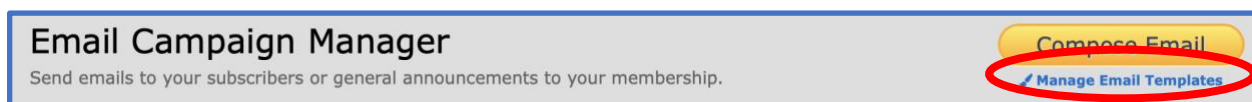
4. From there, select the [Create Email Template] button

5. Create a **Title** for the template and a **Description** of the template and then click the [Create Email Template] button.

6. To use this template, **ALWAYS** select the component you would like to use FIRST and, and then drag the content for that component into the space.

a. In this example, I will click the **IMAGE** Component on the left side of the screen and drag it into the headline space.
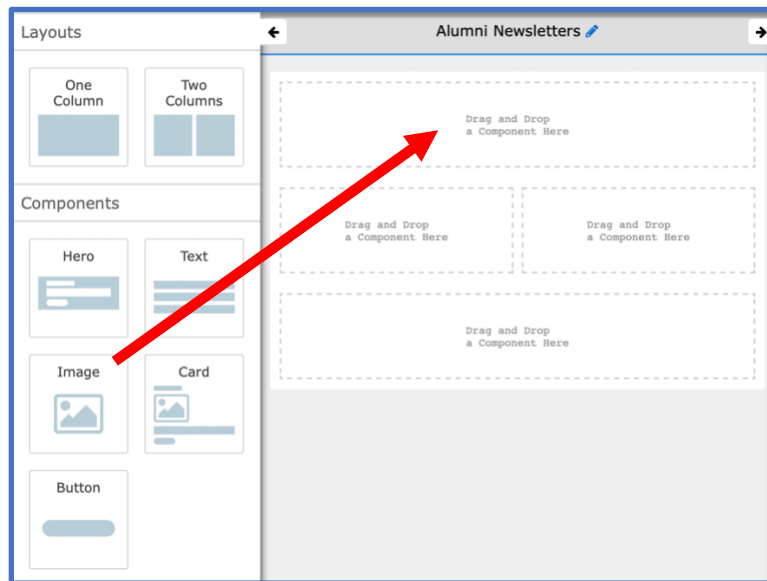
b. Then grab your image and drag it into the **Image File** upload space. Picture will appear where you have placed it.

c. After each step in the process, **ALWAYS** select the [Save & Update] button at the bottom of the right-hand column

d. You will do the same thing to add another photo.

e. Next, you will do the same thing with the **Text Component.** When adding your text, it will appear in the center of the box when adding but look more normal when you preview your work. Type/copy your text into the text editor on the right side of the page. You can use this like any text editor.
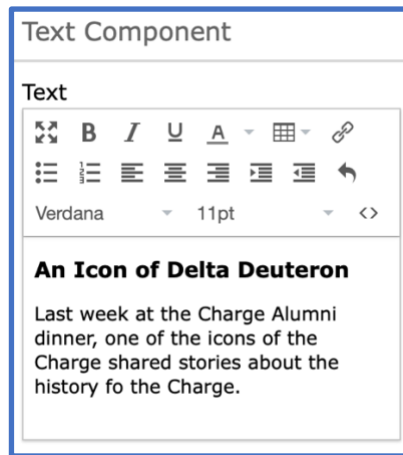
f. Always remember to click the [Save & Update] button

g. You can also add a link to a form or survey your association can create within MyTDX.org. The **Button** component, on the left side of the screen needs to be dragged into the location on the template and then it will guide you through this process.

h. To preview your work, click the at the top of the right-side column

i. Then click the [Preview →] button.
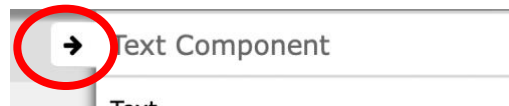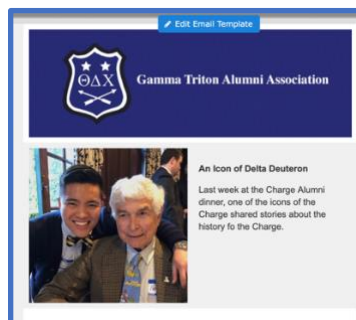
j. Click the [Edit Email Template] to return to your work.

k. Once you are ready to email your Newsletter out, click the **Compose Email →** button on the right side of your window.
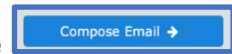
7. At this point, you will follow the directions for [sending a group email](#).

FORMS AND SURVEYS

From time to time you will need to gather information from members of your Charge or Alumni Association, whether it is about an event or just general information. Using the Form function will allow you to do these tasks. Developing a survey is a function of **Forms**.

1. After logging in, click on the **More** tab and select **Forms.**
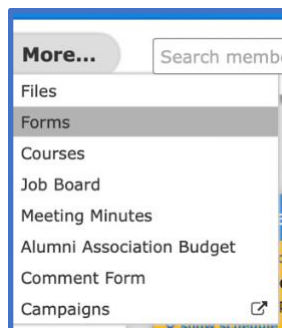
2. Click on the **Create Form** button on the right side of the window.

3. From this window, add a title to your form, write a description of the form select either "Make from available for your members to complete" **OR** "For use as a registration form for and event or conference."

   Currently, the Forms function **cannot** be used as a pre-donation form for a fundraising campaign.

   To "Make form available for your members to complete", you will need to click on one of the other radio buttons and then back on the, **Make form available for your members to complete**, button.

4. If you choose, **Make form available for your members to complete**, your next set of decisions will look like this:

Audience:
- ○ 👥 Make form available for your members to complete
- ○ 💷 For use as a pre-donation form for a fundraising campaign
- ○ 📅 For use as a registration form for an event or conference

Availability:
- ○ This form can be completed multiple times and is always available
- ○ This form is to be completed once and is due on [   ]

Anonymous?
- ○ No, auto-record the submitter's name and affiliation.
- ○ Yes, don't record the submitter's information.

5. At this point you can begin to create your form.

Questions:

Question 1	Will you be attending Homecoming - September 18, 202
Supporting Text	
Answer Format	Checkboxes
	○ Yes
	○ No
	○ Click to add an option or Add "Other"
Required?	☑ Mark this question as required.

Question 2	Including yourself, how many people will be attending wi
Supporting Text	
Answer Format	Multiple Choice
	○ 1
	○ 2
	○ 3
	○ 4
	○ 5
	○
	○ Click to add an option or Add "Other"
Required?	○ Mark this question as required.

Question 3	What is your name and the names of those coming to ho
Supporting Text	
Answer Format	Text
Required?	○ Mark this question as required.

6. Click [Create Form] at the bottom of the page.

7. Once you have created your form, you can see the results, edit the form, and delete the form.

☰ Manage Forms   [Create Form]

Form	Status	Actions
Homecoming Survey Survey of participants for Homecoming 2021	LIVE	⊞ ✎ 📋 ⊘ 🗑

8. Once complete, you can send the form to all members of your alumni membership through the [group mail function](#).

DOCUMENT MANAGEMENT

MyTDX.org is the perfect place to store all of your Charge/association files and records so your Charge or Association can ensure institutional knowledge throughout time. Among the files you might want to consider storing are:
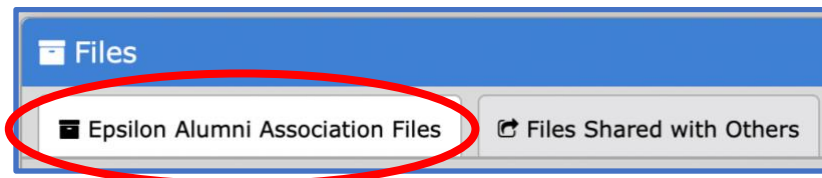
- Official Meeting Minutes
- Budget documents
- Plans for events
- Association By-Laws
- Historical records and information

1. Click on **More** and select **Files**
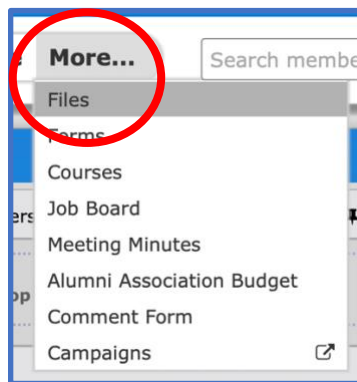
2. Click on your **Charge/Alumni Association** tab:

3. Create a folder if necessary and then:

INVOICING

Invoicing is a function that should be restricted to the president and/or treasurer of the organization. MyTDX.org allows you to link the Charge or Association bank accounts to this function. Once the account has been linked, the Charge or Association can then bill members directly for dues, rent, service fees, events or purchases directly, and have the funds directly deposited into the groups account.

If linking to a financial institution is not available, or desirable, the invoice can still be generated and the recipient can write a check or use another form of payment.

1. From the President's or Officers' Dashboard (if you have permissions), select **Manage Invoices**.
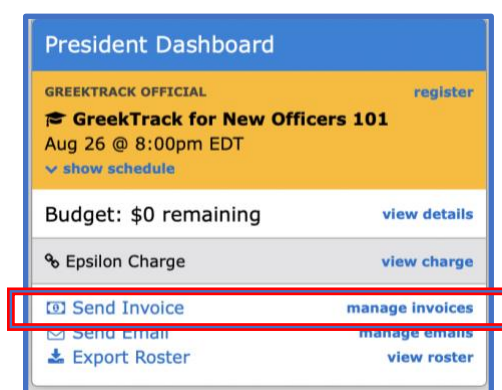
2. Select either **Manage Charge Invoices** OR **Manage Member Invoices**

   For this example, we will be creating an invoice for homecoming and Annual Association Dues and therefore will select, **Manage Member Invoices**.
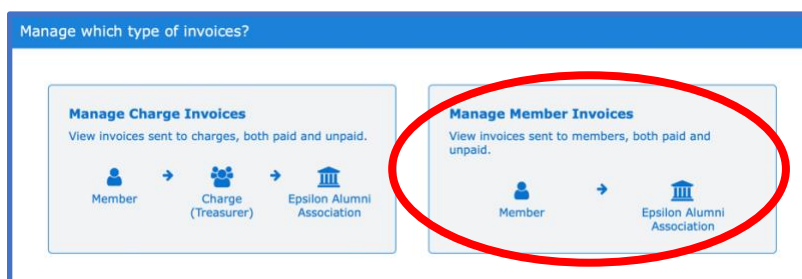
3. Select who the invoice will be sent to and then fill in the description and the amount.

Description	Quantity	Price	Amount
🗑 Annual Allumni Associaiton Dues	1	$ 100	$100.00
🗑 Homecoming 2021	2	$ 100	$200.00
+ Add Item		Subtotal	$300.00
		Total	$300.00

4. Remember to select [Create Invoice(s)] at the bottom of the window.

5. Your invoice will be sent to everyone you selected on your list AND will track payment if you have set up deposit into your Association account. Invoices can be generated for all alumni membership and/or all undergraduate members.

✔ Success
'Homecoming and Dues' member invoice has been sent the 1 selected member associated with Epsilon Alumni Association.

Manage Member Invoices   [Create Invoice] ⚙

| Unpaid | Paid | | | | 🔍 Invoice # Lookup |

Invoice	Title	Member	Affiliations	Amount	Due Date
#00578	📄 Homecoming and Dues	Julian Weller	Headquarters, Epsilon Alumni Association, Epsilon, Mu Triton	$300.00	August 31, 2021

DATA EXPORT

There are times when it will be necessary to generate a roster of members with specific information. This list can be used for check-in at events, to create a "paper" mailing for a specific purpose or to generate lists of brothers by zip code/city, delegation by decade or any other parameter.

There are two general ways to export a roster of members:
- From the President's dashboard
- From the **Manage** tab

Exporting a roster from the President's Dashboard

1. From the Alumni Association President's Dashboard, select Export Roster
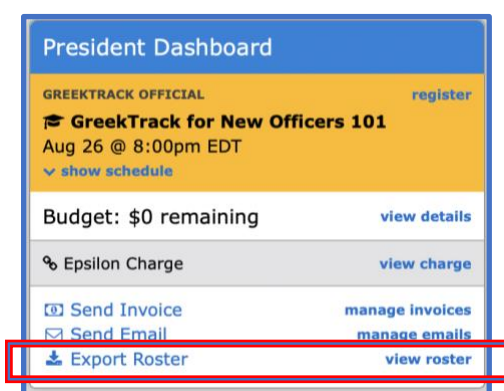
2. From this page you can select the data you want to export

3. Select the account type or membership status

4. Select either, **Open in a new window** OR **Save report as a Comma-Separated Value File (open with Excel)**. Then click [Generate Report] at the bottom of the window.

If you choose to "Open in a new window", you will have the opportunity to review your decisions and export in a variety of formats.

CALENDAR FUNCTIONS

The Calendar function is more than just a place to add dates. The MyTDX.org Calendar function will allow you to:

- Create events on the MyTDX.org calendar
- Note when and where the event will be held
- Allow members to sign-up for your event
- Manage the number of attendees
- Designate a coordinator for the event
- Allow who can see the event and sign-up for the event
- Determine if attendee list is visible to all members or not
- Determine who will be sent an invitation to an event
- Attach files to the event such as a form or newsletter

1. To create an event, click the **Events** tab and select "Add New Event"

Events	Members	Man
View Upcoming Events		
View Event Calendar		
View International Calendar		
Add New Event		
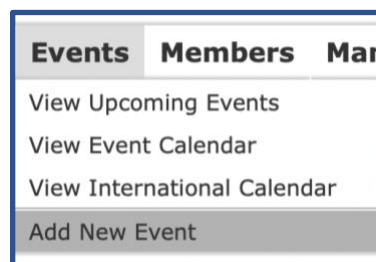
2. Make your selections and then click on Add Calendar Event at the bottom of the window.

3. Once you have added the calendar event, go back to the event tab and select, View Upcoming Events. This is where you will be able to edit and email out the event invitation if you choose to. Just click on the event to edit and send email invitations.

Upcoming Events

AUG 22 SUN **Homecoming 2021**

Admin Actions
- ✉ E-mail attendees
- ▯ Text attendees
- ✏ Edit event
- ▣ Manage attachments
- ✖ Delete event
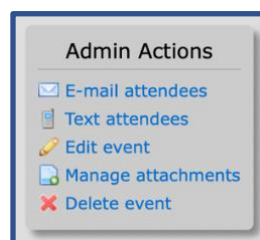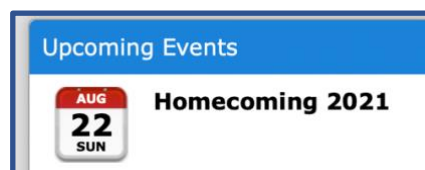
SETTING-UP A BUDGET and TRACKING EXPENSES

The treasurer of any organization has, arguable, one of the most difficult and time-consuming positions. This position is responsible for building a budget, tracking income, managing expenses, invoicing and reporting all of this to the brotherhood on a regular basis. MyTDX.org can assist you in all of these functions while creating on-demand reports when necessary. Among the functions MyTDX.org will assist in doing are:

- Managing online invoicing and online payments
- Managing and recording non-online payments
- Building an online budget
- Managing invoices
- Recording all transactions by position
- Financial transparency with the Charge by building reports

1. All of these functions are available by clicking on the **Manage** tab.
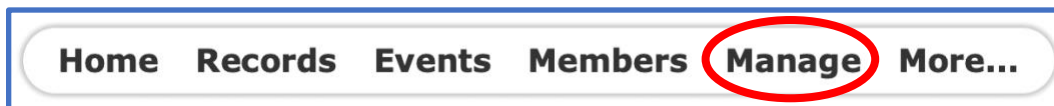
2. To begin to use the functions listed above, scroll down to the **Finances** box and click on **Budget.** This is where you will begin to build/record your budget by position of responsibility
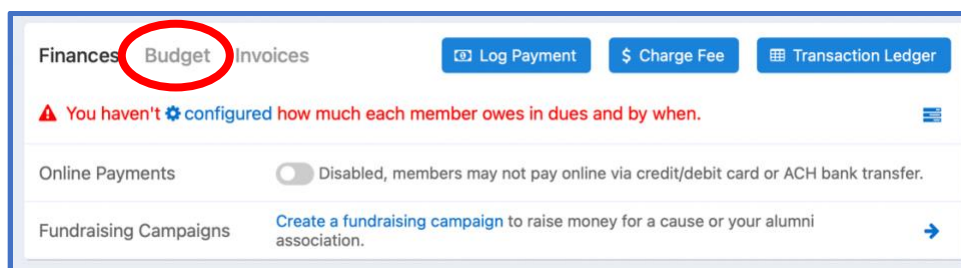
3. You will be presented with a budget, listed by position. If; however, you would like to create a custom budget by activity you can do that by clicking **+Create custom budget** at the bottom of the page and listing the activity. In this example we added Spring Formal as a special budgeted activity.

4. Select the position or activity you will begin with and add the **Amount to Allocate** for the semester/year for all of their activities and click **Update Budget**.

By following this process, we have built a budget with allocations for the Recruitment Chair, Social Chair and a Spring Formal.

5. Now we can begin to track expenses. From the **Manage** page, click on **Transaction Ledger.**

6. Click on the **Log Transaction** button to enter a transaction into the budget.

7. In this first instance, the Recruitment Chair spent $325 on T-Shirts for Fall Recruitment. On September 15, 2021. He also provided the receipt which was scanned and uploaded as an attachment.

8. Once transactions have been added you can again view them in the **Transaction Ledger.**

9. By returning to the **Manage** page and clicking on **Budget** you will see that the budget has been updated with all of the current information.

RECORDING A MEMBER'S DUES OR FEE PAYMENT

When using the invoicing function of MyTDX.org, AND the Charge or Association accounts are linked to MyTDX.org, there is no need to record the payments, it will be done for you. However, if the member pays by check, Venmo or other means, you will need to record this information into MyTDX.org by hand.
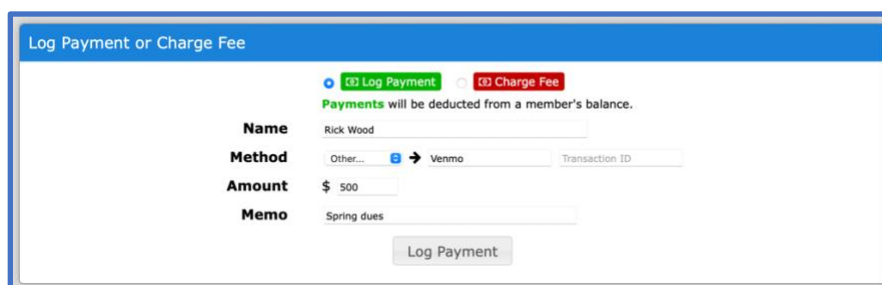
1. Click on the **Manage** tab
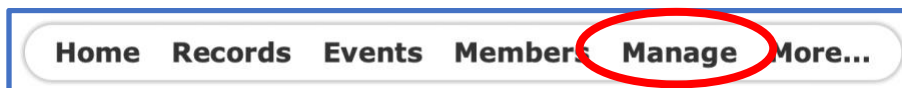

2. Scroll Finance box and click the Log Payment tab
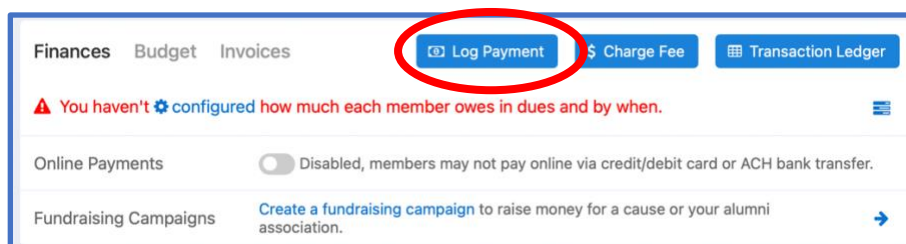
3. Fill in the members **name**, how the payment was made (**Method**), the **amount** and what it was for (**Memo**) and then click **Log Payment**. This will automatically credit the member's account and deduct this from what was on his invoice.
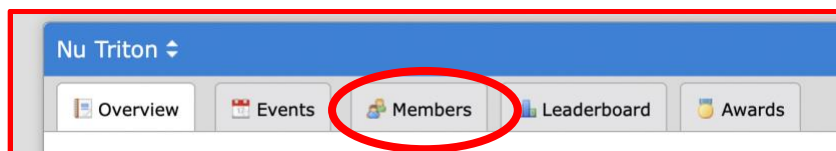
VIEWING THE CHARGE MEMBERSHIP ROSTER

There are times when the Alumni Association of House Corporation needs to access the undergraduate membership roster. This is easily accomplished from the President's home page on MyTDX.org.

1. From the **President's Dashboard** on the right side of the window, click **View Charge**.
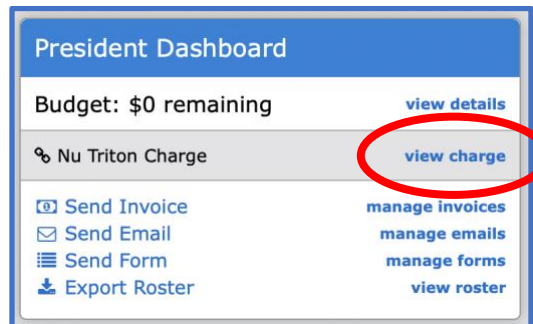
2. Click **Members**

3. You will now have access to the entire membership roster of the Charge