

# Start Here

Overview, training, admin access and contact details

- [Why use Action Network?](#)
- [Overview](#)
- [Training Request](#)
- [Admin access to your mailing list](#)
- [Before Training Starts...](#)

# Why use Action Network?

Why would a group choose to use XR's Action Network account, rather than alternatives such as Mailchimp?

## Benefits

- It's a network - when signing up for a local group email list, people are also subscribed to their regions/nation and to the UK email list. They will therefore be informed of campaigns and activities locally, regionally and nationally. [More detail of the structure of all the lists here.](#)
- This means local group sign ups add to the total on the UK list which is critical for both mobilisation for big actions (e.g. The Big One) and also for fundraising.
- Secure - all admins have their own account, so you don't have to share passwords. If someone leaves the movement, their admin access can be removed without having to change shared passwords.
- You'll never lose access to your mailing list e.g. if the person who set it up leaves XR.
- Support and training is available from the Action Network Data Team and in the Action Network Admins Mattermost channel
- GDPR compliant - if someone wants to unsubscribe or have their data deleted, we can do that in one place, rather than across multiple systems.

## Barriers/Issues

- In common with other mailing list systems, the data is stored on servers that we do not control, and that could be accessed by law enforcement authorities. For this reason, you should never store "spicy" information - such as sign-ups to arrestable actions - on Action Network.
- To get access to this list and use it takes [a bit of training](#), which can be a barrier to some local groups without someone with the time and skills (or determination!) to learn. But we have a very friendly training team who are happy to teach in 1-1 session and go at the pace that suits each individual.

# Overview

## What is Action Network?

It is the tool that XR UK uses for sending emails out to the movement. It is funded centrally and available to all local groups. It is structured by region/nation. People can join either at the 'top' (see image below) by signing up on the [website](#) - or by searching for their local group of the [LGmap](#).

## How Local Groups fit in to the XR Action Network

You may be familiar with other email lists such as Mailchimp - so to point out the main difference with Action Network (and it may sound obvious!) is that it is a NETWORK! Here is a little snapshot



to explain...

For example : if someone joins the Birmingham email list, then automatically get subscribed 'UP' the network (to region and UK lists). The benefit of this is that if we enable more and more local groups to use Action Network to recruit, then all these new subscribers end up on the UK list too - allowing for big announcements of trainings, actions and Rebellions.

Also in this example this person will be on the 'Midlands' list which allows regional level organising and advertising of events, trainings, actions etc.

## Campaign and Community Groups

Not shown on the diagram above of groups such as 'Deep Water', 'Digital Rebellion' or 'XR Walkers' - these also have separate email lists that sit just below the UK list and therefore also feed in to the total numbers of subscribers on the UK list. These lists are not utilised as much as they could be, so if you are in a community group please [get in touch](#).

## There is a huge opportunity to grow the UK list

If 200 sub-groups (either local groups, campaigns or community groups) each recruited 25 new subscribers a month - that would be an additional 5000 on the UK list per month.

## Why use Action Network?

Go to this page to read about [reasons to use Action Network](#)

For information on how to use Action Network for your local, community or campaign group - [start](#)

here

# Training Request

If you would like to request training for yourself (or a small group of you) for anything at all relating to your local group mailing list, then ...

[Use this form to submit a training request.](#)

Also feel free to [contact us](#) directly if you have any questions.

# Admin access to your mailing list

## Introduction

Anyone wanting to be an admin of any Action Network list must adhere to **current policies** (as maintained, monitored and implemented by the Action Network Data Team)

1. Sign the [VOLUNTEER AGREEMENT](#) - it doesn't matter if you don't remember if you've done this and sign it twice. More information on the volunteer agreement is [HERE](#)
2. You will be automatically subscribed to the 'XR Admins' email list where you will be kept up to date with any important info and updates for your role as admin.
3. You must have logged in to your account at least once in the last 12 months to retain your admin permissions. After that time you will be contacted and your permissions removed unless you contact the [AN Data Team](#).
4. The email address that you will use to log in to Action Network must be a personal one (not a generic LG email address) and you shouldn't share your password with anyone else. You can have more than one person as admin on an email list and everyone should have their own individual log in.

## Applying to be admin for a local, regional/national email list

Admins at these levels (e.g. region, county, town, university) are managed locally, usually by asking your LG coordinator, regional coordinator, or 'Gardener'. \*

If you don't know who to ask contact the [Action Network Data Team](#)

---

## How to add another admin to your list

If you are already an admin yourself and want to grant access to someone new, go to [this page here](#) to learn more.

## Applying for UK or Global newsletter email list access

The Action Network Data Team manages applications from Action Network users who need to have admin access to Action Network for the larger lists the UK and Global newsletter lists.

In order to ensure that access to Action Network data and functionality is available only to activists who need it in order to fulfill their role in the organisation, the activist must [Apply to be a UK or Global newsletter admin here](#).

Your application will be reviewed by the Action Network Guardian in the Data Team, who will then refer it back for further information or apply the appropriate permissions for that user.

Please clarify what your role is and what activity that you are responsible for.

## Permissions in Detail

The following chart explains what each permission enables you to do. It's the official Action Network description, and it may not tell you everything, so please ask a member of the Data Team if you're not sure. If in doubt, leave it until you know that you need it.

Permissions	Description
Settings	Administrator can edit group settings, invite and approve administrators, set up fundraising and ticketed event pages that don't require donor email addresses, set administrator permissions, and set the parent of this group in the network.
Launch Email	Administrator can launch and send emails targeted to the group's list.
Reports	Administrator can download report data and mass add or remove tags and subscriptions.
Activists	Administrator can access search and add activists and edit individual records, as well as receive pending merge notifications.
Contributions	Administrator can issue refunds, edit or cancel recurring contributions, convert one-time contributions to recurring when viewing activist records, and upload or manually add or edit transactions, as well as receive contribution failure notifications.
Advanced Uploads	Administrator can use advanced upload features, such as overwriting custom field data or unsubscribing activists in an upload.
Overwrite Network Custom Field Data	Administrator can choose to overwrite parent group custom field data when editing activists. (Without this permission, editing an activist will not overwrite custom field data on parent groups.)
Syndication	Administrator can create syndication packages to be shared with other groups.

Permissions	Description
SQL Mirror reporting	(Not an Action Network admin permission as such). Allows reporting access from the background data using SQL Mirror. This is highly restricted and additional checking will be required.

Questions: contact the [Action Network Data Team](#)

**Document details** Author: @VecchioJohn Updated: 25 April, 2021 by @collininseattle Updated : 7 July, 2021 by @kay-xrnottm Updated : 26 Oct, 2021 by @kay-xrnottm Updated : 23 Feb, 2022 by @kay-xrnottm Updated : 12 Jun, 2022 by @kay-xrnottm Updated : 23 Jan, 2023 by @kay-xrnottm (new UK/Global access form)



# Before Training Starts...

Welcome to the Action Network training for Local Groups. This training is to show you the basics of how Action Network works and will help you through the process of sending an e-mail to your group e-mail list.

If your group is registering on Action Network for the first time, this document will help you go through the setting up process so that you can get the most out of the first training session.

If your group is already using Action Network, some of this will already have been done.

## Who are your admins?

Once you've applied for training you need to confirm the email address you wish to use for your 'admin' access to Action Network and give us any other trusted rebel's email addresses who also want to help administer your Local Group email list.

You must use a personal email address and not a shared email account.

Administrators will be able to send e-mails and view details of the subscribers to your Local Group mailing list. All admins will need to have signed the [XR Volunteer Agreement](#), with the email addresses they will use as admins.

## Contact email for your Local Group

You must also have a Local Group contact email address. Action Network is mostly about sending mail so you will still need an official address for people to reply to which should be listed on the [Local Group Map](#), zoom in to where your pin is on the map and check that the information on there is correct. If the information isn't correct or your group isn't listed then email [map@extinctionrebellion.uk](mailto:map@extinctionrebellion.uk). If you have lost access to your Local Group email or would like a new one setting up in the style `localgroupname@extinctionrebellion.uk` you can find about how to [apply for a extinctionrebellion.uk email on this page](#)

Note: There is currently a problem with using 'proton.me' email addresses with Action Network. It has been seen that if you use it for your 'reply-to' address you get a very bad delivery rate on the emails you send, so they are best avoided.

## Your Existing Mailing List

If you have an existing mailing list outside of Action Network - then we need to transfer that into Action Network, preferably before training. If you have been using mailing list management

software, like MailChimp or have a list of addresses stored on gmail - we can help you to migrate this in a GDPR compliant way, just let us know as early as possible that that's what you need. The easiest way to begin this process is to send out an e-mail to everyone on your existing list along the lines of:

We are moving to a new e-mail system which will help us communicate with supporters and activists in [local-group-name] and will no longer be sending out news and announcements from this system/address. To opt into this new mailing system just visit [http://joinxr.uk/\[your-group-area\]\\*](http://joinxr.uk/[your-group-area]*) and enter your e-mail address (plus name / phone number / postcode if you wish). You will be able to opt out of this system at any time.

But probably make it friendlier.

\*You need to make sure you have this shortlink set up and the URL correct. To test it type [joinxr.uk/\[local-group-name\]](http://joinxr.uk/[local-group-name]). If it goes to a pale blue form with your group name then it is working. If it goes to a green box on the front page of the UK website, then it either hasn't been set up yet or you have the URL wrong and you should contact us.

For more detailed information on email list migration see [here](#).

## We need something to send

When we meet you online for your training session we will want to take you through the entire process of writing and sending an e-mail to your group. You will need to write your first email in advance on a word processor of some sort so that, during the the training, you can copy/paste it over to the Action Network e-mail editor.

You might want to check out this short page first: [Avoiding formatting issues when copy and pasting content](#)

Your e-mail should probably start with a paragraph like this:

This is a message to let you know that we have recently up-dated our mailing system. This will help us better keep in touch with you and let you know what's going on locally. It also means that, if you don't already, you will get occasional e-mails from our [whatever] region and from the Extinction Rebellion UK At the end of this e-mail you'll find links that let you opt out any of these lists

When you design your page, keep formatting simple. The email editor is capable of quite sophisticated layouts, but that's something you'll want to explore later if the need arises.

You can use text with the usual formatting options of bold and font size. You can also add images and they can really liven up an e-mail but you need to keep them to a maximum width of 700 pixels. Action Network includes a simple resizing tool for this which we can show you. Make sure that any images you want to use are easily available on your computer when we come to the training.

After that it's really up to you. Try and find a reason for the mail in addition to telling supporters about the new mailing system. If you have an event coming up, that's ideal, if not then you could find pictures from previous actions or outline more general future plans. If part of your group attended national or regional actions you'll probably find pictures of that on line to add.

You might also read the following short pages to help you.

[Deliverability](#)

[Readability and Accessibility](#)

## Your local group welcome message

When someone joins your group via the map or the joinxr links, you should set up an automatic e-mail in response to new joiners. This can be pretty much anything you like and could be tailored to your particular region, interest group, whatever. You can set this up yourself [by following these instructions](#) OR we can do this for you if you provide some text.

## Is anybody out there?

Depending on your geographical situation, we may be able to identify supporters who have signed up to XR via the national page but not joined your local group; this depends on them having included a postcode. If you can give us the post code sectors (the 2/3 letters/numbers before the space in a postcode) we can search on those for supporters who are not members of your list and add them to it. [This is a useful map for identifying sectors.](#)

## You're all set

Once we have all the bits and pieces above done, and a few extra that we need to do along the way, we're ready to book a training session. The session is about an hour and by the end of it you will have created and sent out a mailing to your local group.