Communications -How to Update and Maintain the La Reata Ranch Website

Use this document to upload, delete, and edit documents on the Laraeataranch.org WordPress website.

Log in to WordPress: **Website Login** http://lareataranch.org/wp-admin

Login ID: lareataranch

Password: _____ (Obtained from Secretary/Treasurer)

WordPress will open in the Dashboard view, which has information concerning recent activity, some advertising for WordPress Users and a Menu along the left border.

Some important menu items:

All Posts provides a list of all the posts on the website. If you click on one post, you have the option to edit, view, delete, etc. This list can be sorted by category. Every post is assigned at least one category, which determines which tab the document will be posted to in the website. POSTS ARE LISTED ON THE WEB PAGE ACCORDING TO THE DATE THEY ARE POSTED, LAST IN SHOWN FIRST.

Posting a New Document

Under "All Posts" is a drop down menu which includes "**Add New**".

Step 1. Click on "Add New" and you will get the Add New Post Screen. This screen allows formatting and editing if you have a short message or alert that you want to compose here. For meeting agendas and minutes, it is best to first write and format the document in MS Word on your computer. All documents should have appropriate footers that define the document title, file location, revision number and date. Then save another version of the same document as a PDF file on your computer.

Step 2. Copy and paste the Word file into the "Add New Post" paragraph section. Check and modify formatting if necessary.

Step 3. Type the title into the "Enter Title Here" field.

Step 4. On the right side of the form, click "Save Draft".

Step 5. On the left side menu, click on "Media" and then "Add New".

Step 6. Click on "Select Files" and select the PDF file version of the document.

Step 7. The PDF document will be listed. Click "Edit".

Step 8. On the right side you will see the file URL. Copy it so it can be pasted in the next steps. Note that there is a File Expirator below this section of the form. Use it if you want a document to be Trashed or Deleted after a specified amount of time.

Step 9. Go back to the left side menu and click on "All Posts". Then click edit on the word document draft that was saved in step 4.

Step 10. At the bottom of the document, type "Printer Friendly Version" then click on the hyperlink icon in the top line of the format menu. Paste the URL into the link. Then click on the "link option" (symbol looks like a gear wheel) and type the Document title in the "Link Text" box. Press "Update".

Step 11. On the right side, select the category that this document will be posted under. (Categories are the drop down menu tabs on the website.)

Step 12. If this document is not permanent, then on the right side, scroll down to the Document Expirator and set the date and time for the document to be deleted or trashed.

Step 13. On the right side, before you "Publish", "Preview" the draft copy to see how it will look on the website. Note any edits that are needed and return to the draft copy to make edits. When you are satisfied with the document "Publish" it.

Note: You can delete or edit any document from step 9. However, any changes made to a document with a "Printer Friendly" link in it will also require changing the PDF file. You will need to go back to Media library and delete the original PDF file. Then download the new file as in step 5 and follow through step 13 again.

Posting a New Event on the Calendar.

Step 1. On the left side menu, click on "Add New".

Step 2. Add a title for the new event, i.e. "April BOD Meeting". This title is all that will show on the calendar.

Step 3. Click on the "Event Date and Time" and fill in the appropriate information. This information will be visible when the calendar event is scrolled over on the website calendar.

Step 4. Click on "Event Location Details" and type in the address.

Step 5. Click on "Organizer Contact Information" and fill in appropriate information. This information will only show up if the calendar "Event" is double clicked on the website calendar.

Step 6. If there are any special comments, such as "This meeting was postponed from an earlier date, or the meeting location has been moved from there to here" they can be posted in the "edit" box at the bottom of the screen. These comments will be visible when the calendar event is scrolled over on the web site calendar.

Step 7. If this event posting is to be temporary, the expiration can be scheduled on the "Post Expirator" menu on the right side of the screen.

Step 8. On the top right side menu, you can preview how the event will look on the website.

If you are interrupted at any time during the posting, just save the document as a draft and come back to it later.

Step 9. When the posting has been reviewed and is ready to post, press the "Publish" button on the top right side menu.

Step 10. Any existing event can be edited by clicking on "Events/All Events" on the left side menu and clicking "Edit" on that event title.

NOTE: ALL DATES FOR FUTURE BOARD MEETINGS WILL BE POSTED AT THE BEGINNING OF THE YEAR AS "ALL DAY" MEETINGS ON THE CALENDAR. AT A MINIMUM OF 7 DAYS PRIOR TO THE MEETING, THE MEETING AGENDA MUST BE POSTED AND THE CALENDAR EVENT UPDATED WITH TIME, LOCATION AND CONTACT.

Archiving Meeting Minutes in March of Each Year

Sometime in March of each year, the meeting minutes from the previous year should be archived. This means that the actual posted document will be deleted, but a new document will be created and posted to the "Archive Meeting Minutes" category that is a listing of the PDF files and their URL links that remain in the "Media" menu.

Step 1. On the left side menu go to "Posts" and then "New".

Step 2. In the title, Type "Year (2018) Meeting Minutes".

Step 3. On the right side select the category "Meeting Minutes Archive" save as a draft. Go to "Media Library" and locate the file of the meeting minutes of the appropriate month, beginning with January.

Step 4. Click on the file and copy the URL.

Step 5. Return to "All Posts". It should open to your draft document.

Step 6. Find the Insert/Edit link icon in the edit menu and click on it.

Step 7. Paste the URL that you copied in Step 4.

Step 8. Click on link options (symbol looks like a gear wheel) and under "Link Text" type, "LRR BOD Minutes Month year" (looks like LRR BOD Minutes April 2015).

Step 9. Click "Update". Move the curser to the next line. Save as "Draft" again.

Step 10. Go back to Step 3 and find the next months' meeting minutes. Continue until you have listed all of the year's meeting minutes, including the Spring and Fall POA meetings.

Step 11. After all the documents have been listed, press "Preview" and look for anything that needs to be edited.

Step 12. After any edits have been completed, press "Publish" to post the document.

Step 13. Now return to "All Posts" find each of the posts that have just been archived as PDF documents and delete their posts. You can check mark each and go to bulk actions/trash/apply to do it in one move.

How to View Email to The Board

Step 1. Log in and scroll to the bottom of the Dashboard.

Step 2. Under the "Forms" section you will see a list of the emails that can be sent to the Board and ACC through the LRR website. Click on any of these to see a list of all emails that have been sent.

Step 3. To verify the Board has received each of these emails in the past month, check mark each email within the date range.

Step 4. Then go to the top of the page and press the down arrow in the "Bulk Actions" box.

Step 5. Select the "Print "option and print all the emails.

Step 6. Bring these emails to the next BOD meeting and have the Officers verify which have been read and acted upon.

Step 7. After the meeting, return to steps 1 through 4.

Step 8. In the "Bulk Actions" box select "Mark as Read" and update the list.

How to Add, Delete or Modify a Menu Item on the Website

Step 1. To view the existing menu hierarchy, go to the left side menu of the Dashboard and click on "Appearance" and then "Menus".

Step 2. On the right side of the page you will see the list of menu titles in boxes. Each menu item can be dragged and dropped to a new location in the hierarchy by clicking and dragging. Sub-menus are indicated by indentation under the menu item above it.

Step 3**.** To **ADD** a new menu item, you must first create a new Category for this menu.

Leave the "Appearance/Menu" tab and go to the "Posts" and then "Categories" tab. Under "Add a New Category" type the name of the category, which will also become the name of the new menu item. Leave the "Slug" box blank. It will be filled in automatically. **Do <u>Not</u> add a Parent Category. Adding a parent category will cause all posts to be duplicated under both menus.** Click on "Add New Category" to save it.

Step 4. Return to "Appearance/Menu". On the left side of the page, you will see a box with Pages, Posts Custom Links and Categories. Expand the Categories entry, click on "View All" and find the new category that you just added in Step 3. Check the box beside the category and then click on the "Add to Menu" button. This will create a new menu box in the hierarchy on the right side of the page. Go back to Step 2 to move the new menu box to the desired location. Remember to indent the box if the item is to be a sub menu of the box above it.

Step 5. To **MOVE** posted documents from one menu location to another, go to the "Posts" menu and then "All Posts". Find the documents you want to relocate. Remember that you can use the filter functions to shorten the search. You can search by words in the title of the "Search" box or you can filter by category in the filter box, or you can filter by dates. If you need to move several documents, you can check the box on the left side of the title of each document and then use the bulk actions tab to edit each.

To move the document, go to the categories list on the right side of the page and remove the check mark in the current location and add a check mark to the new location category. Press the update button to make the change.