

CDC Sponsored Website Content Managers Quick Start Guide

This Quick Start Guide covers the initial training and content input on a new CDC Sponsored Website. It covers ONLY the basics of the Content input. Please refer to the Content Managers Guide for in-depth explanations of the operating WordPress (WP) operating systems.

WP Website Nomenclature: This is the Home page of the website which is similar to what you will see the first time you log to it.

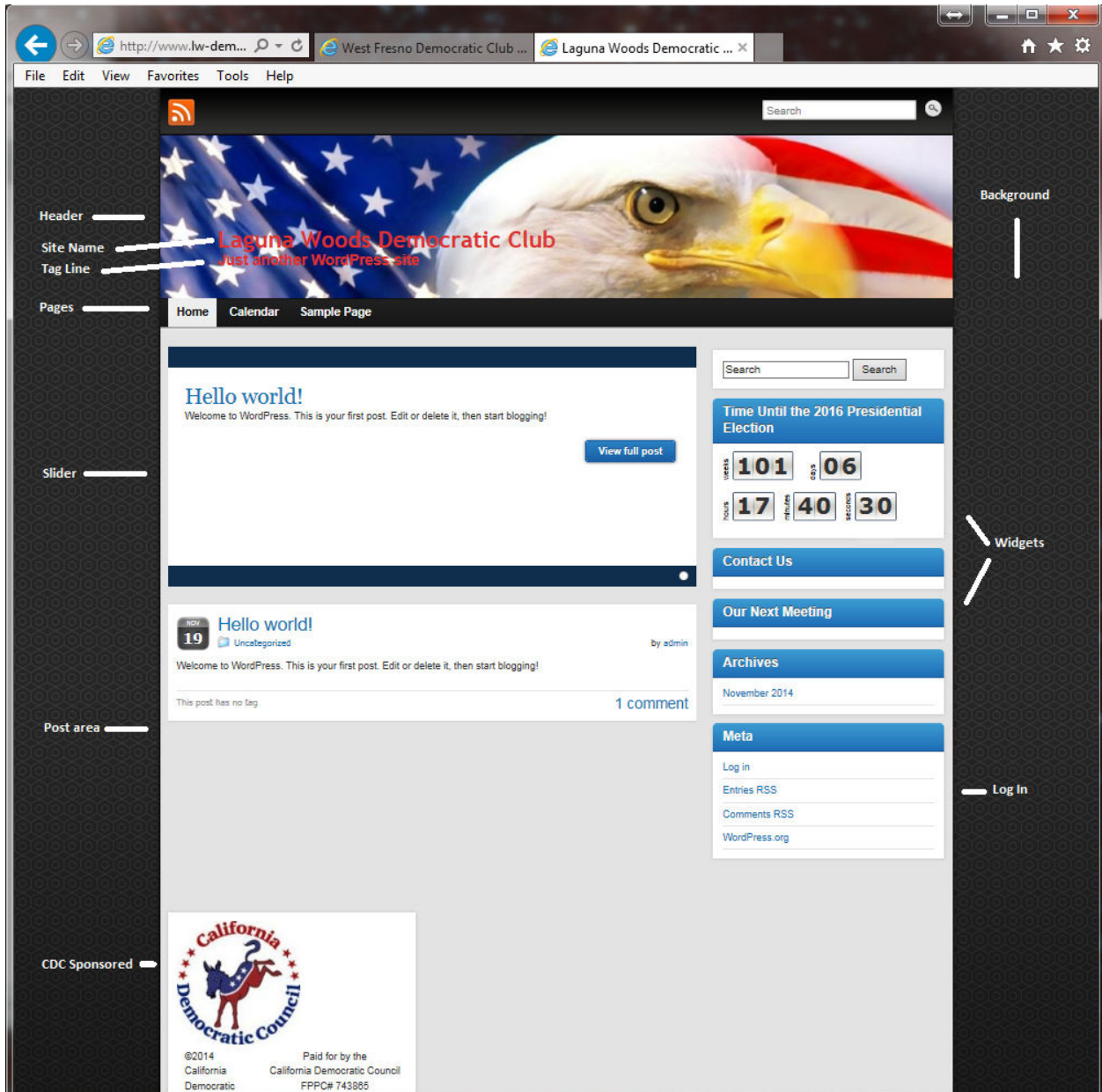


Figure 1

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The first time you log onto your new site:

- 1) Locate the Login widget on the right hand side near the center of the page. There are two versions of the login widget:
 - A) IF you have the “Meta” version you will see a blue heading bar with the word “Meta” in it. Directly below this heading you will see the words “Log in”. Click on the “Log in” and the Log in screen will appear. Enter your username as *webmaster* and your (temporary) password as *temppass* then click on the blue “log in” button. This action will start the WP “Dashboard”
 - B) IF you have the Ajax version you will see a blue heading bar with the words “Log In”. Under the heading you will see “Username”, enter *webmaster* in the window, and “Password” enter *temppass* in the window and then click on the “Log In” button. This action will start the WP “Dashboard”.

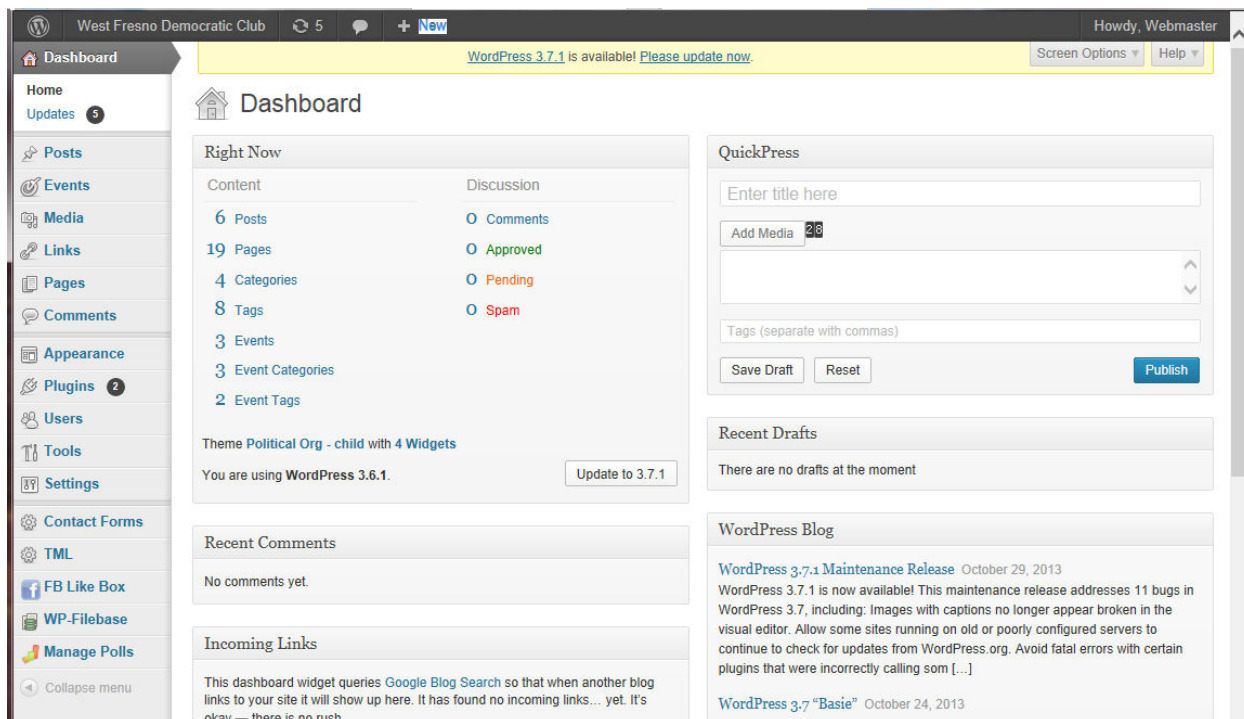


Figure 2

- 2) Once you are on the Dashboard, locate the “Users” heading on the left hand column and click on it. This action will bring up the “Users” main menu. You should see two Usernames listed:
 - A) Admin: PLEASE DO NOT CHANGE ANYTHING ON THE admin User as this is used by the CDC Tech/IT committee to assist you when there are problems with your website.
 - B) Webmaster: This is the CMs User name. Hover the cursor over the name and a sub-menu will appear. Click on the “edit” item. This action will open the “Edit User” page.
 - a) Under the “Personal Options” heading, locate and enter (unless they are already there) your First Name, and Last Name and on the “Display name publically as” item use the pull-down to select how you want WP to display your name on posts, articles, etc.
 - b) Under the “Contact Info” heading enter your E-mail address where you would normally receive your email. WP uses this address to send a “Forgot” password’ request.

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- c) In the “Biographical Info” box you may enter (or not enter) information you wish to share about yourself. Information entered here is displayed IF someone clicks on your name next to “Posted by” on the Posting section of WP.
 - d) New Password: Your assigned password is *temppass*. In the box enter a new password of your choice and then repeat this password in the “Repeat New Password” box below.
 - e) Click on the blue “update User” button at the bottom of the page. This action will take you back to the “Users” page. Please note that all the Dashboard items are available to hover or click on at all times so be careful to “Save”, “Update” the page you are working on BEFORE you click on some other Dashboard item.
- 3) A word about the Dashboard:
- A) In Site Admin Mode which I call Dashboard Mode, the top black line contains several items:
 - a) It starts with the WP Logo “W”. Hovering over this icon will open a list of various WP items and links. The Documentation link opens the WP Codex.
 - b) The Next item is a House (Home) icon with the Website name next to that. This name acts as a back-and-forth switch. When you are at the Dashboard and want to see the Site, click on the name. When you are at the site and want to go to the Dashboard, click on the name.
 - c) Next to the Site name is a round arrow with a number beside it. This indicates the number of Plugin updates or actions awaiting your review.
 - d) Next is the Comments icon with a number next to it. IF you have allowed comments to be posted on your Posts or Pages then the number of comments awaiting your action is listed here. IF you have NOT allowed comments then this number will be 0.
 - e) Next is a +New icon. This is a quick list to the Post, Media, Page and User editors. I strongly suggest that you do not use this item until you are familiar with the basic processes of WP.
 - f) Next is Performance – this allows you control of the W3 Cache system. Leave this alone for the time being.
 - g) The final item on this line is the “Howdy,” item. Hovering this item shows “admin” or your name if that is what you entered on the “User” page. Also you can “Edit your Profile” and “Log Out” You can also “log Out” where you “Logged in” originally.
- 4) IT IS IMPORTANT THAT YOU LOG OUT AFTER YOU ARE FINISHED WITH THE ADMINISTRATION (DASHBOARD) AREA.
- 5) Your first editing will be the widgets. On the Dashboard hover over the “Appearance” item and choose “Widgets”. This action will bring up the Widgets page. On the left hand side is a list of available widgets. On the right hand side is the current list of widgets displayed on the right Sidebar area of the Home page.
- A) Select the “Text: Contact Us” pull-down arrow to the right. This action will open the widget for editing. You can edit the Title and enter whatever you want in the second larger box. We suggest leaving “Contact Us” in the Title and adding to the box “Contact (club president or webmaster name, phone and/or email address) for information regarding the Club or this site”. Put a checkmark into the “Automatically add paragraphs” box and click on the blue “Save” button. Then click on the blue “Close” item.
 - B) Next select the “Text: Our Next Meeting” pull-down arrow. This action will bring up the edit window for this widget. We suggest adding to the Title text “is on (mm/dd/) beginning at (time AM/PM) at (location). Then in the box “Our monthly meetings are held on the ## day of each month at (meeting location or statement to check website for meeting information) beginning at (time AM/PM)” You may add additional information if you desire such as this

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- months program/speaker, social times, business meeting times, program beginning time, adjournment time, etc. Next click on the blue “Save” button and then the blue Close item.
- C) You may add new widgets to the Sidebar Widget Area by click/hold/drag/drop from the left menu to the right area where you want the widget to appear. While you are holding a dragged widget over an area a box will appear showing the exact location. IF you drop the widget in the wrong location, simply click on it, hold and drag to a new location. IF you want to put a picture or graphic on on the Sidebar Widget area, use the “Really Simple Image” Widget to drag and drop where you want it. Make sure that you “Save” and close any widgets that you add.
- 6) Next we will go to the “Plugins” item on the left hand menu and click on it. This action will bring up the “Plugins” page. Plugins are short programs which add lots of different options to WP. You will probably learn to love them. Plugins can add items to the main Dashboard listing as well as items to “Settings”.
- A) The list shows the available plugins – some are “Active” and some are just available:
- a) Active plugins have a Blue or Red vertical bar beside them. Blue indicates “Active” and Red indicates that there is an “Update” available. On Red bar Plugins, there is a line with a round arrow just below the Plugin name with the comment “There is a new version of (plugin name) available. View version ##### details or update now. You need to view the version details as somewhere in there is a statement as to whether this new version is compatible with your version of WP. To check your WP version number, simply click on the “W” logo in the top left hadn corner of the screen (if you do this once you have the version number you will need to recheck the Plugins item to return to the Plugins page). IF the new version is compatible then click on the “update now” statement. This action will open an Update page which will show the update as it occurs. Once complete you return to the Plugins page by clicking on the “Return to Plugins” statement at the bottom of the page.
 - b) Available plugins have no vertical bar beside them and they have the “Activate”, “Edit” and “Delete” below the Plugin Name.
 - c) You may look at the over 30,000 Plugins available by clicking on the “Add New” button beside the “Plugins” heading. This action will bring up the “Add Plugins” page. You are offered three choices of “Featured” “Popular” and “Favorites” which screen the items shown in the pictorial listing. OR, you can “Search Plugins” by typing in a name or category or type you are looking for. Whenever you find a Plugin you might like to try out, **BE SURE TO CHECK THAT IT IS COMPATIBLE WITH YOUR VERSION OF WP.** It is possible that even if the plugin shows compatibility that the PHP version is not compatible – you can’t know this until you try the Plugin. IF you get errors when activating then simply “delete” the plugin and let the Tech/It Committee know about the problem. Also, when you are considering a plugin be sure to note the number of blue stars below the plugin logo. **Lots of stars is good, no stars is probably not your cup of tea.**
- 7) Locate the “Events” item on the main Dashboard list and hover over it. You will see several options “All Events”, “Add New”, “Event Categories”, etc. Choose the “All Events” item. This action will take you to the “Events” page which will list all the events on the Calendar. This links to the Calendar item on the Home page. Next to the “Events” heading click on the “Add New” button.
- A) In the blue box enter the Title “Monthly Club Meeting”;
 - B) Under the “Event Details” section enter the Start date / time and the End date / time.

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- C) IF the Time Zone window is showing an incorrect zone use the pull-down to locate “Los Angeles”
 - D) Click on the “Repeat” box. This action will open the Select recurrence pattern page. Here you select the “Monthly” item and then click on the “on the day of the week”. This action brings up the “Every” item. Complete the item with the pull-downs and then click on the green “Apply” button
 - E) Now click on the Event location Details and complete this item.
 - F) Click on the Event Cost and Tickets and complete this item.
 - G) Finally click on the Organizer Contact Info and complete this item.
 - H) Now, click on the blue “Publish” button to the right and then check the listing under the “Calendar” item on the Home Page. Your club meeting information should be shown there.
- 8) Next click on the “Pages” item on the Dashboard list. This action will open the “Pages” page. You will see a list of the current pages as “Calendar” and “Sample Page”. We are going to edit the Sample Page.
- A) Hover over the Sample Page item and click on the “Edit” item. This action will open the “Edit Page”.
 - a) Edit the Title to “About Us” and then in the text box delete ALL the text and replace it with a short statement about your club such as “We are the Democratic Club which represents Democrats in this area” or whatever you want.
 - b) On the right hand side of the page find the “Page Attribute” section:
 - i) Locate “Parent” directly below the “Page Attribute” title and leave the “(no Parent)” in the box.
 - ii) Leave the “Template” item alone and do not change the “Theme Default” window.
 - iii) Locate the “Order” item below and enter 0 in the box. This will place this page in the first position on the Home Page. All subsequent pages will need a number here to indicate their place below this page – 1, 2, etc.
 - B) Locate and click on the blue “Publish” button. Check your edits on the Home Page.
 - C) Click on the Pages item on the main Dashboard list and click on the “Add New” button next to the Pages heading. This action will bring up the “Edit Pages” page.
 - a) In the “Enter title here” box enter “What We Do” In the text box area you need to enter information about your club, its beliefs, goals, mission statement, etc.
 - b) When the text box is complete:
 - i) go to the “Page Attributes” section and under the “Parent” item use the pull-down to choose “About Us”. This action assigns this page to be located below the main About Us item in the Home page of the website.
 - ii) Leave the Template section alone.
 - iii) Under the Order item enter the number 1 in the box. This assigns and fixes the number one position to this page. IF you want to change location of this page later you can do so by changing this number.
 - iv) Click on the blue “Publish” button in the “Publish” section and check the Home page.
 - D) You can add pages below the “About Us” page such as “2015 Officers”, “Mission Statement”, “Club Constitution and Bylaws”, “Club Service Area”, etc., using the above procedures. Be sure and remember to give each item a position number and to “Publish” each item when complete.
 - E) Finally, to create a new Page on the pages bar on the Home Page of the Website, you simply create a new Title and text and then leave the “Parent” section item to the right as “(no Parent)” and then “Publish”. This action adds a new page to the pages bar. To add pages

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below that new page, use the Parent pull-down in the window to select the new page title entered above. Suggestions for additional pages:

- a) Comments and Editorial Page. Add comments and editorial content here which is more static than posts.
 - b) Voter Information Page. A page which lists the Secretary of State's link to register to vote and a link to locate the voters polling place in an upcoming election.
 - c) A Links Page which shows URL and information on other Democratic Organizations such as Local Clubs, the County DCC, California Democratic Party, etc.
 - d) A page which lists copies of the clubs newsletters.
 - e) Look at other Democratic Club websites around the state for ideas. A good list of State Clubs can be located at www.cdc-ca.org under the Club Listing heading. Your listing will be added to this as soon as your site is up and running.
- 9) Finally, click on the "Posts" item on the main Dashboard list. This action will bring up the "Posts" page. You will find a list of the current posts – there should only be one "Hello world!" item on the list. Hover and choose the "Edit" option. This action will bring up the "Edit Post" page. This is where you will most likely spend most of your Content Editing time. Refer to your Content Managers Guide for posting procedures.

At this point you have an up and running website and you have learned how to begin the setup. You have learned a lot about WP and its editing procedures. The Content Managers Guide goes into more detail. For additional questions about the WordPress system you can also check out the extensive documentation provided. You can access the main "Codex" for WP by clicking on the "W" logo (top left hand corner on the Dashboard" or you can access the "Help" pull-down in the top right hand corner directly under the "Howdy" item of each Dashboard page which will address the specific page you are on. You can simply type in questions in Google and search and you can sign up for the WordPress forum and post questions there. Finally, the CDC provides telephone and email support.

You learn WP by doing. We at the CDC think that you should consider Content Management at least once a week with a minimum of once a month in order to keep your site up to date and interesting. We are planning on offering a direct Editorial Post to those clubs who wish to subscribe. Contact the Tech/IT Committee for further details.

We are also setting up a CDC Webmasters/Content Managers group to assist with answering questions and helping with ideas.

We wish you great good luck with your new site. Please don't hesitate to contact us with questions.