

Bexar County Master Gardeners



General Operations Run Book For bexarmg.org website

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1. Purpose

This document summarizes how to perform common activities on the bexarmg.org website. Common activities are those that occur in the normal, day-to-day usage of the website for items such as updating the front-page focus event, adding events, etc.

This document does not cover items involved with the structure or core design of the site. Nor does it cover operations relating to ecommerce. There are three Run Books in total:

- General Operations Run Book (this document)
- eCommerce Run Book (for Shop Owners)
- IT Admin Run Book (for site administrators; requires a deep knowledge of WordPress)

For changes in structure or core design, refer to the Admin Run Book or contact IT.

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2. Basic Site Design

The section describes the basic website design. The information here is intended to provide familiarity with the design and to define the terms used in the remainder of the document.



Front page

The front page of the website is crafted using the X-Theme Cornerstone editor and is intended to be modified only by IT. The design is such that normal changes to the web site do not require access to these elements and can be updated with standard WordPress tools (and requiring no coding). If changes are needed such as changes to graphics or backgrounds, please contact IT.

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For normal operations, there are 2 primary functional sections of the front page.

- 1) The Feature Box: this is the area intended to hold content that is of immediate interest to the target audience. The content that is visible in this box is any Post with category "Feature Box". If more than one Post is marked in the category of Feature Box, then all are shown (with the oldest first, determined by publish date).
- 2) Featured Events: this area holds a list of Events that are of immediate interest to the target audience. The Events selected for display here are Events marked with the Category "Home Page Event". Only Events that have not completed at the time the web page is initially loaded will be shown (any Event that is already completed is not listed).

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Home May We Help? Events and Programs Calendar Get Involved Contact Members

MAY WE HELP
REQUEST A SPEAKER

MEMBERS
VMS

SCION NEWSLETTER
GARDENING LIBRARY

Feature Box



Grape Growing and Collaboration at the San Antonio Botanical Garden's Culinary Garden

Hosted by the Bexar County Master Gardeners

Featured Events

Spring Meeting
March 20 @ 9:00 am - 1:00 pm

Grape Growing and Collaboration at the Culinary Garden – BCMG General Meeting
March 15 @ 6:00 pm - 8:30 pm

Plant Propagation – MG Training Workshop
March 29 @ 9:00 am - 12:00 pm

Challenges in Maintaining the Reach – BCMG Monthly Meeting
April 19 @ 1:00 pm - 3:00 pm

Birdies for Charity – BCMG
April 26

BCMG College Scholarship Offering
April 30

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Pages, Posts, and Events

For this site, there are specific uses for each of these types of content containers.

- 1) **Pages:** these are used to hold content that is viewed directly, such as that for the Helpline.
- 2) **Posts** are used to hold content that is listed or displayed elsewhere such as an edition of the Leaflet or Scion. Posts are not linked to menu items, for example, and their content is only shown when referenced from another place on the site.
- 3) **Events** are a special kind of item that describes an event that happens at a place and time. Events have a title, description, location (a Venue), a time, and a category. Venues are defined to contain a geographic location so that a (Google) map can be shown.

>> The site uses all 3 kinds of elements so be sure to look on the Admin menu for the correct element(s).

Contact Forms

Forms are used to gather specific information that is then sent via email to a designated list of addresses. The creation and change of forms is generally out of scope; if changes are required or new forms are needed, either refer to the IT Admin Run-Book or contact IT.

The Bexar MG website uses a plugin (Contact Form 7) to implement and manage contact forms and currently has the following forms:

- Contact: allows members or the public to contact BCMG
- Intern Training Application: submit a request to be trained as an MG
- Speaker Request: allows the public to request an MG speaker at their event
- Speakers Bureau Volunteer: updates details for speakers

Example Contact form as it appears on the website.

Contact Us:

Your Name (required)

Your Email (required)

Your Phone number: (required)

Subject (required)

Your Message (required)

I'm not a robot 

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Shortcodes

WordPress uses shortcodes to implement features such as contact forms and other functions. These are implemented in plug-ins.

A few examples of the use for shortcodes are as follows:

- The Home Page pulls the content from the Feature Page using a short code
- Feature events appear in the right column on the home page using short codes
- The Scion page uses short codes to list Posts of the Scion

>> The Shortcodes should not be changed or modified as they will materially impact viewing of the website. If changes are required contact IT.

The screenshot shows the WordPress 'Edit Page' interface for a page titled 'Leaflet'. The page content includes a 'Leaflet' logo with a green leaf graphic, the word 'Shortcode' in large red text, and a red arrow pointing to a red-bordered box containing the shortcode: `[post-list category='leaflet-blog' orderby='date' order='DESC']`.

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Admin Screen

Below is the admin screen after log in. All menu items referred to in the following text are based on this screen.

Your screen may vary based on privileges (admin vs editor vs shop owner, etc.)

The screenshot shows the WordPress Admin Dashboard for the site 'BCMG Home'. The user is logged in as 'admin'. The dashboard includes several widgets:

- At a Glance:** Shows 183 Posts and 46 Pages. WordPress 4.9.4 is running on the Child Theme theme.
- Activity:** Lists recently published posts, including 'Scion – March 2018', 'Pictures from Cultivate March 2018', 'Board Minutes – 2018 February', 'Grape Growing – BCMG Monthly Meeting', and 'Leaflet – February 21, 2018'.
- Google Analytics Dashboard:** Shows data for the last 30 days. Channels: 2043. Breakdown: Organic (972), Direct (721), Referral (258), Social (91), Email (1). A table lists top pages and their user counts.
- Pages and Users Table:**

Pages	Users
BCMG Home Bexar County Master Gardeners	706
38th Annual San Antonio Home & Garden Show	541
CULTIVATE! – Spring 2018 Workshops BCMG Home	233
CULTIVATE! BCMG Home	217
Members BCMG Home	200
Events for February 2018	188
Leaflet – February 21, 2018 BCMG Home	143
(not set)	104
Product categories Cultivate! BCMG Home	103
Events and Programs BCMG Home	102

A red arrow points to the 'Pages' menu item in the left sidebar, which is labeled 'Admin Menu'.

Page Analytics

A plugin is installed to gather page and other analytics. The plugin uses Google Analytics. To view Page and other levels of analytics, refer to the Google Analytics Dashboard on the Admin Dashboard (see above).

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Broken Links

A plugin is used to scan the website (pages, posts, events, PDFs) for links that do not connect to a valid page. To access the report:

1. From the Admin menu
2. Tools -> Broken Links
3. Once you fix a link, you can ask the tool to Recheck the link, or click "Not broken" (hover over the broken URL to see these options).

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3. Roles and Job Descriptions

This section defines the primary job functions for maintaining the website. No coding skills are required, only creativity and willingness to work with WordPress.

Website Content Manager

Role: Responsible for all content on the website: maintaining content, updating with additional content, removing outdated content, etc.

Primary Activities:

- Update the contents of the Feature Box as needed
- Select Events for the Featured Events

Notes:

- Selected content is delegated to specific authors (see below).

Leaflet Editor

Role: Responsible for developing and distributing the Leaflet. The Leaflet Editor must gather news items from the variety of source, pull together stories with pictures, and publish.

Primary Activities:

- Create Leaflet Post
- Publish notification on MailChimp

Notes:

-

Scion Editor

Role: Responsible for developing and distributing the Scion. The Scion Editor must gather news items from the variety of source, pull together stories with pictures, and publish.

Primary Activities:

- Create Scion Post

Notes:

-

Calendar Manager

Role: Responsible for developing and maintaining a calendar of all BCMG and community gardening related events.

Primary Activities:

- Create Event
- Change Event
- Manage Venues
- Manage Event Categories

Notes:

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- The Calendar is a community resource. A calendar that covers a large breadth of activity in the community draws attention to BCMG and its mission.

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4. Activities for the Website Content Manager

Add, Remove, Update the contents of the Feature Box

The contents on the home page for the Feature Box comes from Posts using the Feature Box category.

To find the Posts that are appearing in the Feature Box

1. From the Admin menu
2. Posts -> Categories
3. Click on the number in the Count column. This will list all Posts being shown in the Feature Box. Note that if more than one Post is flagged in this Category, then they are shown in the order of publish date (oldest first).

By removing the Feature Box category from a Post, it will no longer appear on the home page

By changing the contents of a Post with the Feature Box category, the contents on the home page can be changed.

Add, Remove, Update the contents of the Featured Events

The contents of the Featured Events column are from the Events with the “Home Page Event” category selected.

Note that the right column for Featured Events will only display up to 8 Events. The software will pick the 8 next events to show and ignore any others.

To find the Events that are selected for the home page

1. From the Admin menu
2. Events -> Event Categories
3. Click on the number in the Count column for Home Page Event

To add an Event to the Featured Event column on the home page

1. From the Admin menu
2. Events
3. Select the Event to be added (or removed) from the Featured Event column
4. Select (or de-select) the “Home Page Event” category
5. Update

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5. Activities for the Leaflet Editor

The page displayed when the Leaflet Blog is selected is the Page titled Leaflet. However, all you will find on that Page is a heading and a shortcode whose purpose is to show a list of Posts in the category “Leaflet Blog”. Under normal circumstances, it is not necessary to make changes to the Leaflet Page.

To create a new Leaflet

1. From the Admin menu
2. Posts -> Add New (note this is a Post, not a Page)
3. In the main text box, enter the content of the Leaflet including any graphics, links, etc. as you normally would.
4. In the right column, select the category “Leaflet Blog”. If you forget to check this box, the Post will not show up in the Leaflet list.
5. Publish

Publish Notification on MailChimp

1. Draft Leaflet or Scion as Blog Post on BCMG Website in a browser tab. When final, copy the URL to link in a short message in the MailChimp Campaign.
2. Log in to MailChimp in another browser tab and go to Templates: Find saved message shell and click on Edit.
 - a. In the left visual space, click on the block with the date which will open the content workspace for the area.
 - b. Update the message narrative as needed. Paste the Blog URL to link appropriate word. Click Save & Close at the left corner, bottom of the workspace area.
3. In upper right corner of screen, click on Preview & Test.
 - a. Select “Send a test email”
 - b. Enter your email address in the popup window.
 - c. Click: Send Test (lower left corner).
4. Test all links in the test email. Make any corrections in the content on MailChimp.
5. Go to the Templates list and use dropdown arrow next to Edit in the right column opposite the Leaflet you are working.
 - a. Select Create Campaign.
 - b. In new window, click on edit name in upper left and add a title: BCMG Leaflet — mmddyyyy
 - c. Next click on Add Recipients in right column, then choose list: BCMG Members-2018 (can only send to one list at a time...so will actually send out same template in a second campaign to “Friends of BCMG”)
 - d. Click the check box and select *FNAME* or *FNAME* *LNAME* which will display the recipient name (more personal & avoids spam filters)

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- e. Click Add Subject and complete (for Leaflet: paste in “BCMG Leaflet  — Date” copied from an old copy of personal saved mail). Copy the subject line to use again for the “Friends” campaign.
 - f. Click on Send in upper right corner.
6. Repeat #7 for Friends of BCMG subscribers list.

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6. Activities for the Scion Editor

The page displayed when the Scion Blog is selected is the Page titled The Scion Blog. However, all you will find on that Page is a heading and a shortcode whose purpose is to show a list of Posts in the category “Scion Blog”. Under normal circumstances, it is not necessary to make changes to the Scion Page.

To create a new Scion

1. From the Admin menu
2. Posts -> Add New (note this is a Post, not a Page)
3. In the main text box, enter the content of the Leaflet including any graphics, links, etc. as you normally would.
4. In the right column, select the category “Scion Blog”. If you forget to check this box, the Post will not show up in the Scion list.
5. Publish

Publish Notification on MailChimp

(see MailChimp section in Leaflet)

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7. Activities for the Calendar Manager

Create a New Event

To create a new event

1. From the Admin menu
2. Events -> Add New
3. Fill in the main text with the information about the event. Note that this is just like a Page or Post in that fonts, colors, and graphics are all supported.
4. (on the same screen) Under Time & Date: enter the start date and time and end date and time. All events default to Central Time (adjusted for daylight savings).
5. Under Location: select the Venue for the event. See the section below on creating a new venue. Recommend leaving the Google Map and Google Map Link selected since these allow a map to be shown on the Event page.
6. We are not using the Organizers section.
7. Event cost may be added but is optional.
8. In the right side of the screen, Select the category for the event. See the section below for details on Events
9. We are not using the Post Expirator on Events
10. Publish

Change an Existing Event

To modify an existing event

1. From the Admin menu
2. Events
3. Select the Event to modify
4. Adjust the text in the main text box. Note that this is just like a Page or Post in that fonts, colors, and graphics are all supported.
5. (on the same screen) Under Time & Date: adjust the start date and time and end date and time. All events default to Central Time (adjusted for daylight savings).
6. Under Location: adjust the Venue for the event. See the section below on creating a new venue. Recommend to leave the Google Map and Google Map Link selected since these allow a map to be shown on the Event page.
7. We are not using the Organizers section.
8. Event cost may be added but is completely optional.
9. In the right side of the screen, Adjust the category for the event. See the section below for details on Events
10. We are not using the Post Expirator on Events
11. Update

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Event Venues

A Venue is the place where an Event is held. We maintain Venues in WordPress to enable Google Maps to provide information on where the venue is located and how to get there.

Generally, a Venue should only be entered once and then used wherever that Venue is utilized.

To add a Venue

1. Events -> Venues
2. Add New
3. In the main text box, enter any details on the venue. Useful information here would generally be any specifics on getting to the venue or parking if Google or other mapping software might lead the user to the wrong location.
4. (on the same screen) Under Venue Information: enter the address, city, state, and zip code.
5. Publish

To Modify a Venue

1. Events -> Venues
2. Select the Venue
3. Adjust the values as needed
4. Update

Event Categories

Event Categories are used to indicate the kind of event. Each Category has a unique color associated with it to make it easy in the calendar view to see which events are of a given type.

In general, new Event Categories should not be needed. However, they easily be added, changed, or removed as needed.

The colors for Event Categories is set in

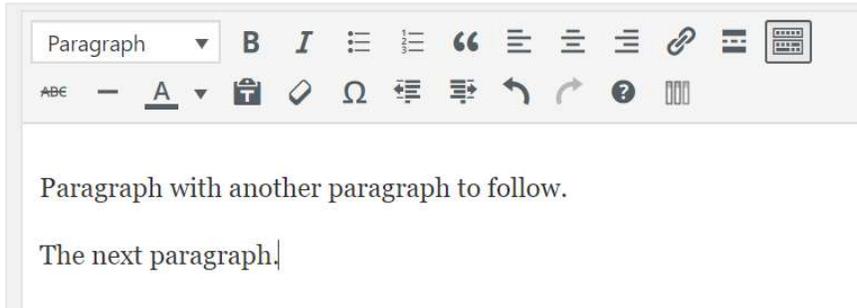
1. From the Admin menu
2. Events -> Settings, then Category Colors tab.
3. If you do not want an event color to be used, select the checkbox in the 'Hide' column.

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8. Tips and Tricks

New Paragraph vs New Line; Enter and Shift-Enter

In the visual text editor, when you hit enter, you create a new paragraph. By default, paragraphs always have ~6px of clear space at the top of a paragraph.

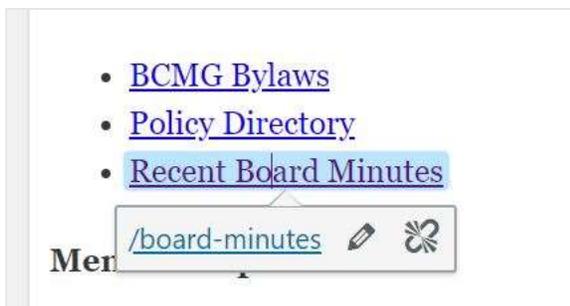


In some cases, however, this extra padding can be a problem. To remedy this, use shift-Enter the end of the line (with “follow.”)



Create Link to Open in a New Tab

From the text editor click in the link.

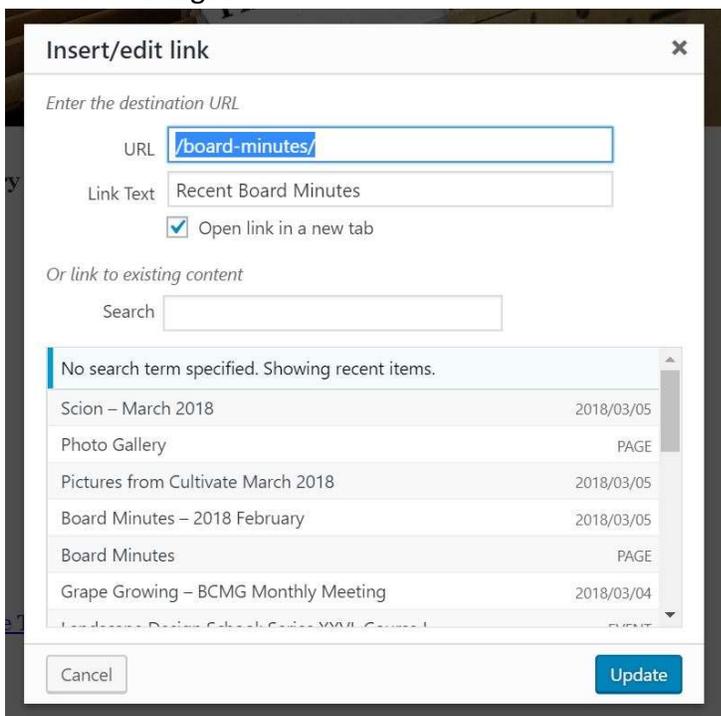


Click the pencil to enter edit mode.

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Then click the gear.



To have the link open in a new tab, check the box for “Open link in new tab”, then Update.

How to insert a PDF

The PDF must first be uploaded to the Media library.

From Admin menu,

1. Media -> Add New
2. Drop or select files to upload

To then add to a page/post/event,

1. Add Media
2. Select the PDF

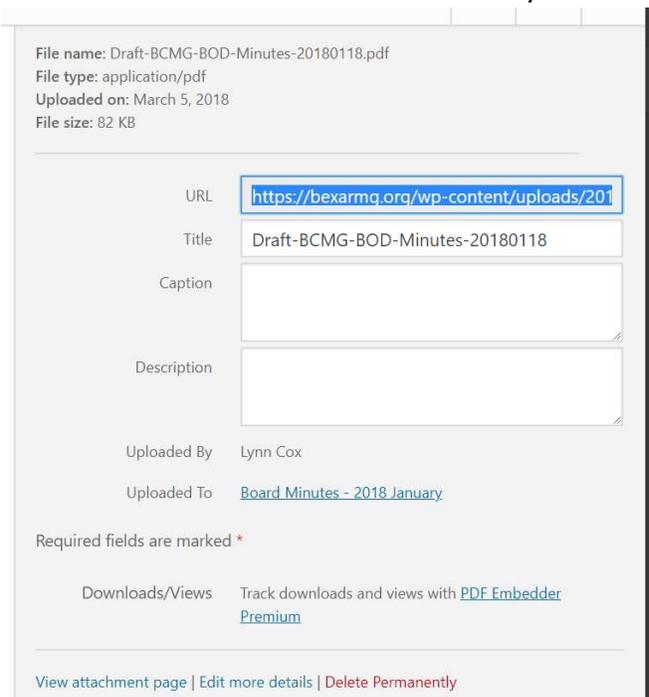
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This method inserts the PDF Embedder which shows the PDF in the web page.

If you want to insert a link to a PDF

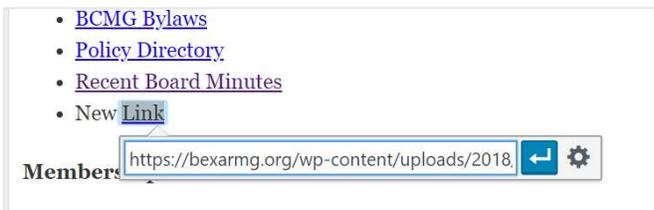
1. Ensure the PDF is in the Media library
2. From the media library, select the PDF
3. On the right side of the Media details, select the text in the URL and copy to the clipboard
4. Then past that URL into the desired link

URL for the PDF item in the Media Library



The screenshot shows the 'Media details' page for a PDF file. At the top, it lists the file name 'Draft-BCMG-BOD-Minutes-20180118.pdf', file type 'application/pdf', upload date 'March 5, 2018', and file size '82 KB'. Below this, there are several input fields: 'URL' (containing 'https://bexarmg.org/wp-content/uploads/20180118/Draft-BCMG-BOD-Minutes-20180118.pdf'), 'Title' (containing 'Draft-BCMG-BOD-Minutes-20180118'), 'Caption', and 'Description'. The 'Uploaded By' field shows 'Lynn Cox' and 'Uploaded To' shows 'Board Minutes - 2018 January'. At the bottom, there is a checkbox for 'Track downloads and views with PDF Embedder Premium' and a note 'Required fields are marked *'. Navigation links at the bottom include 'View attachment page', 'Edit more details', and 'Delete Permanently'.

Pasting the link text.



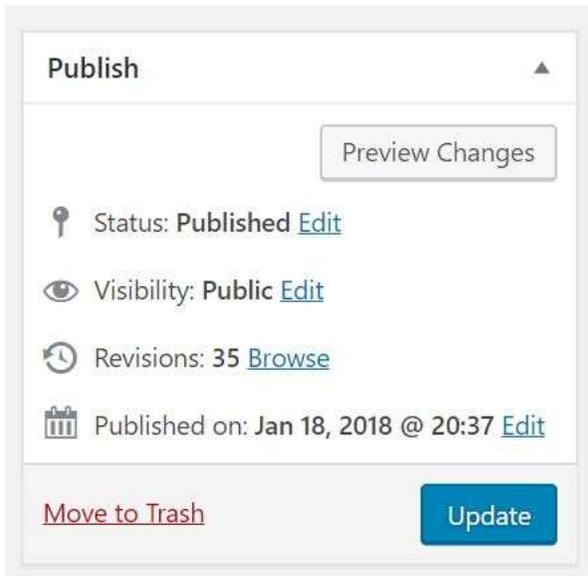
The screenshot shows a link insertion dialog box. It has a list of links: 'BCMG Bylaws', 'Policy Directory', 'Recent Board Minutes', and 'New Link'. The 'New Link' option is selected. Below the list, there is a text input field containing the URL 'https://bexarmg.org/wp-content/uploads/20180118/Draft-BCMG-BOD-Minutes-20180118.pdf'. To the right of the input field are a blue arrow icon and a gear icon. The word 'Members' is partially visible on the left side of the dialog.

How to revert to a previous version of a Page or Post

If you find that the changes you made to a page after an update are not to be kept then you can revert to a previous version of the page. Note that you cannot revert on Events.

In the top right of the page/post edit, click Browse next to Revisions.

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This will bring up a screen to let you see the changed between the current version and all previously saved versions. Use the slider at the top of that screen to change the version to restore to.

