
Richmond Rotary Website Maintenance Guide

Nick Despota
June 2015

Content Management System

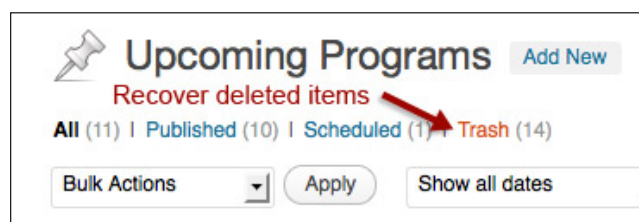
Today many websites are built using a content management system, or CMS. A CMS enables website owners to add, edit or delete content—text, pictures, entire pages—without needing to master HTML or buy special website editing applications.

We built the Rotary website using WordPress, a type of CMS. This guide describes WordPress techniques for maintaining the website. If you want more information, you can find tutorials online (YouTube is full of them) or purchase one of the many books about WordPress 3.

Here you'll learn how to log into its password-protected administrative section, navigating to the section or page you want to change, and entering text or adding pictures in pre-defined areas. The text is automatically formatted to match the website styles and layout. Pretty cool, really.

If you have no prior experience with this kind of tool, learning the basics of WordPress will take a few hours. Getting really comfortable with the basic tasks, however, will probably require performing the basic tasks repeatedly for a few weeks.

The good news: if you make a mistake, you can undo it. WordPress has a revision function that lets you “roll-back” to a previously saved version of a page. If you inadvertently “trash” a post, the item can be recovered from a “trash bin”.



Content types

WordPress organizes content into 3 basic types: pages, posts, and widgets. These types don't correspond exactly to the pages you see on our website, which make editing and display methods a bit confusing. But once you understand the characteristics of each content type, you'll see that these 3 categories make sense.

Pages

In Wordpress, pages are text and pictures that are displayed on the website. They remain unchanged until you edit that content or delete the page. In that sense, Wordpress pages are “static”.

Examples of pages on the Rotary website are the **About** and **Current Projects** pages.

Posts

Posts also display text and pictures but—and it's an important “but”—they also have a date of publication, and are assigned to one or more categories. The date and categories enable us to arrange the posts chronologically and group them by categories. Posts can appear in the main body of pages, but they can also be excerpted for sidebars on selected pages.

Examples of posts on the Rotary website are **The Flywheel** and **Upcoming Programs**. We update this content weekly.

The sidebar for **Upcoming Programs** in the sidebar of Flywheel pages shows the next 3 weeks of programs. This illustrates the sense in which posts are “dynamic”, as opposed to “static” content.

Upcoming Programs

January 11
In our occasional series about Making a Buck & Running a Business in West County, Scott Vickery, General Sales Manager of Honda of El Cerrito will visit Richmond Rotary to discuss the modern, 21st Century, automobile dealership. Forgive Scott if ... [More →](#)

January 18
SparkPoint Centers are financial education centers that help individuals and families who are struggling to make ends meet. They help their clients address

Widgets

Widgets are optional content modules that can be added to, and customized for, a WordPress website. Widget content usually appear in the sidebars of selected pages. An example of a widget on our website is the **Flywheel Archive** in the sidebar of the home page: it's an updated list of links to earlier posts. A new link is automatically generated each time a Flywheel post is saved. Widgets also display the search box, and the listing of club officers on the **Committee and Officers** page.

Rotary Website Maintenance Tasks

In order of the frequency of update (weekly, yearly, rarely), the website maintenance tasks are:

1. The Flywheel (weekly posts)
2. Upcoming Programs (weekly posts)
3. Static pages (for example, About or Current Projects)
4. Member Directory (Uses a simple administrative interface, called Connections.)
5. Sidebar content (Uses widgets).

Only the first 3 of these maintenance tasks are covered in the following pages. But to do any of these tasks you must first log-in. Before you do, we need to explain user roles in WordPress.

User Roles

Wordpress uses the concept of roles, which gives us the ability to control and assign what particular users can and cannot do. These capabilities include writing and editing posts, creating pages, moderating comments (a moot point: we don't allow comments on our posts), and managing the appearance and layout of pages and menus.

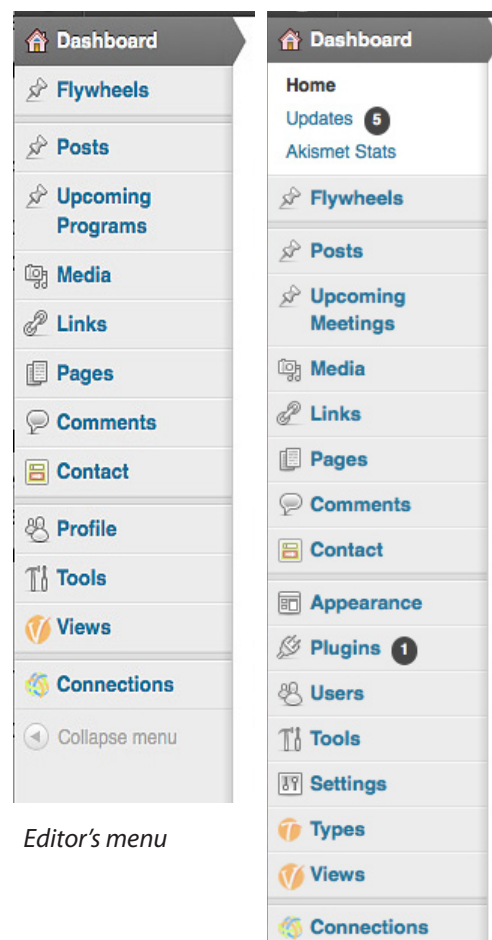
For the purposes of the Rotary website, we only need 2 roles: **Administrator** and **Editor**.

The two images on the right illustrate that the Administrator has access to functions that the Editor does not. This insures that neophytes won't inadvertently mess up pages or crash the website.

In brief, these are the capabilities of these 2 roles:

Administrator: Has access to all administrative features. In addition to adding and editing posts and pages, like an Editor, the Administrator can add new users, add or edit sidebars, change the main navigation menu, change page layouts, create new users, and change the overall look of the website.

Editor: Can create and edit his or her own and others' posts and pages, publish these, and upload files for access by the site's visitors.



Editor's menu

Administrator's menu

Upcoming Programs: The big picture

Upcoming Programs entries are posts. That means each entry has a date, title, text and, optionally, a picture. (See *Elements of Upcoming Programs post*, below.) Posts must also have a category, which is essential for displaying it where it needs to be on the website. The category is usually not visible to the reader. The category name for Upcoming Programs, oddly enough, is “upcoming programs”.

In the right-hand sidebar of the Flywheel, you will see short descriptions of the next 3 upcoming programs in reverse chronological order—most recent first.

If the posts are more than 40 words long, you see an *excerpt* of the post, not the entirety. In that case, a More link, automatically inserted, will lead the visitor to a separate page that shows the entire post.

Keep in mind that the **Upcoming Program** description and picture for any given week will become This Week’s Program for the Flywheel, when that program is current.

Upcoming Programs

January 11

In our occasional series about Making a Buck & Running a Business in West County, Scott Vickery, General Sales Manager of Honda of El Cerrito will visit Richmond Rotary to discuss the modern, 21st Century, automobile dealership. Forgive Scott if ...
[More →](#)

January 18

SparkPoint Centers are financial education centers that help individuals and families who are struggling to make ends meet. They help their clients address

How to Create the Upcoming Program posts

Please read this entire section before creating your first post.

There are two steps to the process of creating Upcoming Program posts. The first is entering text and uploading a suitable picture (or choosing it from the Media Library if it’s already been uploaded.)

The second is placing the post in chronological order so that it appears in the sidebar of the Flywheel, to show the next 3 weeks of upcoming programs.

Elements of the Upcoming Programs post

The screenshot shows the top navigation bar of the Richmond Rotary website with links: The Flywheel, Members Directory, Meetings, Calendar, About, Current Projects, and Log-in. The main content area displays an 'Upcoming Programs' post for January 18. The post title is 'Sparkpoint Centers'. The text describes SparkPoint Centers as financial education centers that help individuals and families who are struggling to make ends meet. They help their clients address immediate financial crises, get them back on their feet, and build financially secure futures. A photo shows a woman presenting to a group of people. Red arrows point to the date 'January 18', the title 'Sparkpoint Centers', the text, and the photo. At the bottom, red arrows point to links for 'January 11' and 'January 26'.

← January 11

January 26 →

Preparing content for Upcoming Program post

1. In a simple text editor (e.g., NotePad on a PC or TextEdit on a Mac), compose the text for the **Upcoming Program** description or copy it from the club's calendar (<http://www.richmondcarotary.org/rotary-calendar/>). In most cases our Program Coordinator will have entered the program description in the calendar. Get it from there. (But don't copy the notes about who is the finder, who will introduce the speaker, etc.) Save this text file in case you don't complete the **Upcoming Program** post in one session.

2. Find a picture. Most images on our website come from other websites. For example, the presenter's organization often has an image that's appropriate for our use. Getting it from there usually won't be a problem. The presenter may also have an image he or she can email to you.

Another source for pictures is **Google Images** (<http://www.google.com/imghp?hl=en&tab=wi>). Images from government-funded organizations are public domain so can be used without obtaining permission. A third source of images is **Creative Commons** (<http://search.creativecommons.org/>) This search engine queries other sites for images for which the owner has given blanket permission for non-commercial uses.

To download an image from a website, right-click it, and choose Save As from the contextual menu (methods differ slightly on PCs and Macs), and save it to a folder on your computer. In most cases, we need horizontal pictures that are approximately 250 pixels wide. Wordpress can automatically crop to that width if your picture is larger. More on that later.

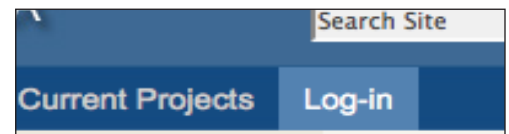
Log in

Click the Log-in menu item on the far right of the Richmond Rotary website's top navigation bar. Alternately, you can go to <http://www.richmondcarotary.org/wp-admin/> then bookmark the link for future use.

In the log in screen fields, enter:

Username _____ and

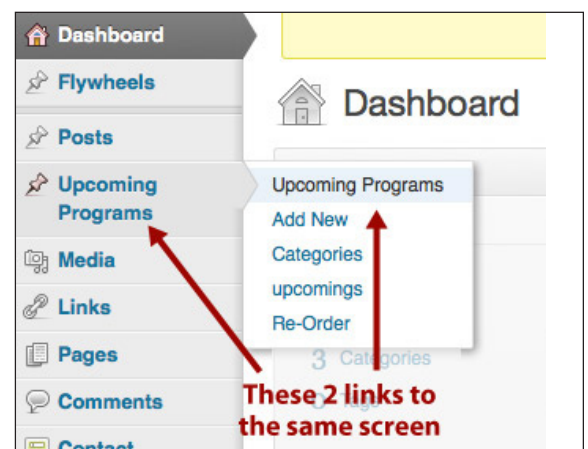
Password _____



Assuming you entered the correct values (passwords are case sensitive), the next screen that appears will be the **Dashboard**. The Dashboard gives a quick status report on the website—number of pages, posts and comments, for instance. But its most important feature is the left hand menu, which you saw on page 3.

Before creating a new **Upcoming Program** post, please orient yourself to the Upcoming Programs administrative options. To do that, roll your mouse over the link Upcoming Programs, then look at the menu of links that appear. (Again, options differ for the Administrator and Editor.)

Choose **Upcoming Programs**. It goes to same screen as the link by the same name in the vertical menu bar. That screen is shown on the next page.



Upcoming Programs screen

WordPress 3.5 is available! Please notify the site administrator.

Upcoming Programs [Add New](#)

All (11) | Published (10) | Scheduled (1) | Trash (14)

Bulk Actions [Apply](#) Show all dates [View all categories](#) [Filter](#)

<input type="checkbox"/> Title	Categories	Date	ID
<input type="checkbox"/> January 18 Edit Quick Edit Trash View	Upcoming programs	2012/12/24 Published	1484
<input type="checkbox"/> January 26	Upcoming programs	2012/12/24 Published	1486
<input type="checkbox"/> February 1	Upcoming programs	2012/12/24 Published	1488
<input type="checkbox"/> February 8	Upcoming programs	2013/01/08 Published	1513

All posts of the category, Upcoming programs, are listed on this screen, most recent first. Posts that have been saved but not yet published are indicated by the word “Draft” after the title of the post (we use the date as the title of the post). After creating a post and saving it, you will return to this screen to edit it by clicking the “Edit” link below its date.

We also trash posts older than a month from the current date. There is no need to keep them because we transfer their content—the program title, description, and image—to the Flywheel for the week in which that program is presented. Now let’s create a new **Upcoming Program** post.

Creating Upcoming Program post

From the left sidebar menu, choose **Add New**. The **Add Upcoming Program** screen appears.

On the next page we’ll describe the method for entering content into the fields on the **Add Upcoming Program** screen. But first, on the right side of this screen look for the **Categories** box.

There you must check the Upcoming programs check box.

If you don’t do that, your post will not appear in the sidebar of The Flywheel page.

Categories

All Categories Most Used

☐ Flywheel

☐ Uncategorized

☒ Upcoming programs

Important. Check this category.

No Categories box? Check your Screen Options

In order to unclutter the screen, Wordpress lets users hide editing features that they don’t use. If **Categories** doesn’t appear in the right side of your screen, then click the *Screen Options* tab in the upper right. A panel will open across the top of the editing screen.

You will want to make sure these 4 *Screen Options* are checked:

- Flywheel Content
- Content Template
- Categories
- Revisions

Now turn your attention back to the main editing screen area.

Screen Options

Click if you don't see the Categories box.

Add New Upcoming Program screen

The screenshot shows the 'Add New Upcoming Program' interface. At the top, there's a title 'Add New Upcoming Program' with a pushpin icon. Below it, a date field contains 'January 11', with a red arrow pointing to it and the instruction '1. Program date. Month and day only, no year'. To the right of the date field are 'Edit' and 'View Upcoming Meeting' buttons. Below the date field is a 'Permalink' field showing 'http://www.richmondcarotary.org/upcoming/january-11/'.

Below the permalink is a 'Visual' and 'HTML' tab interface. A red arrow points to the 'Visual' tab with the instruction '2. Click "Visual" if not already chosen.' The 'Visual' tab is active, showing a rich text editor toolbar with various formatting options like bold, italic, underline, link, unlink, and text color. Below the toolbar is a text entry box containing a paragraph of text about Scott Vickery, General Sales Manager of Honda of El Cerrito, visiting Richmond Rotary. A red arrow points to this text box with the instruction '3. Paste in text you copied from the Calendar to your text editor.'

Below the text entry box is a 'Path' field with the value 'p'. Below that is a 'Word count' field showing '69'. To the right of the word count is a status bar indicating 'Draft saved at 6:15:17 pm. Last edited by admin on January 6, 2013 at 3:06 am'.

Below the status bar is a section titled 'Upcoming presentation'. It contains a description: 'Title and image. For description, please use editing field above. Description should be under approximately 100 words.' Below this is a 'Title of presentation' field containing 'Honda of El Cerrito', with a red arrow pointing to it and the instruction '4. Enter the title of the presentation.' Below the title field is a note: 'Title of presentation. Keep to one line.'

1. Enter program date in the format shown. Don't enter the year (we *do* add the year to Flywheel posts, but **Upcoming Program** posts are not kept for more than a month or two so the year is irrelevant).

2. At the top of the main text entry screen (the biggest box), notice the 2 tabs in the upper right: **Visual** and **HTML**. If it is not already chosen, click **Visual**. This provides a full menu of formatting options in the menu bar above the text entry box.

HTML reveals some of the basic coding and so enables you to understand why something doesn't appear as you expect. You don't need the HTML view now but click the tab anyway to see what's there. Spaces between blocks of text are rendered as spaces in the visual rendering. (This is not true of actual HTML code, in which line spacing is ignored. The Wordpress HTML view is a hybrid of code and visual rendering.)

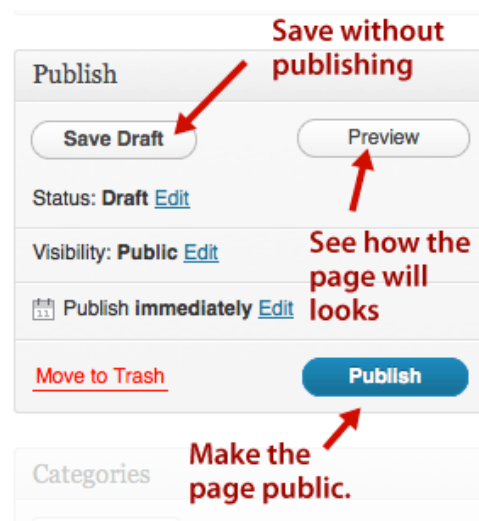
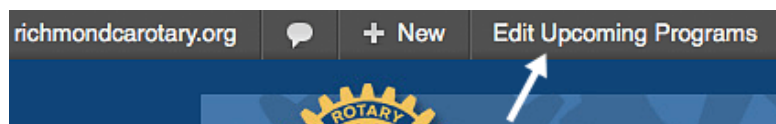
3. Now go back to the Visual tab and paste the descriptive text you composed or copied from the Rotary Calendar. Select the words for applying bold and italic format, and click the corresponding formatting icon in the top menu bar.

We'll talk about uploading images from your computer in a moment, but first look at the **Publish** box on the right.

The **Preview** and **Save Draft** buttons in this box let you preview and save your work without publishing it (that is, making it visible to the public). By saving a draft, you can return to it later, and publish it only when you're ready.

When you click **Publish**, the post won't necessarily appear in the sidebar because we have set its widget to show only the 3 most recent posts. More on that later.

Note that after you preview a post, you can quickly return to its editing screen by clicking the **Edit Upcoming Meeting** link in the dark horizontal band that runs along the top of the post.



Uploading pictures

In the first part of this section, we asked you to find a picture suited for a particular week's presentation and save it to your hard drive. Now we'll insert it into the **Upcoming Programs** post.

Crop or resize to reduce image file size

If the picture file size is quite large, more than, say, 250 kb, crop or resize it before uploading it to the Richmond Rotary website. Camera image files are typically 10 to 20 times larger than that: 2.5 to 5 MB. Inserting such a large file into a web page—even if its visual display dimensions are shrunk by the browser—results in very long download times for web visitors as they wait for the image to load. Not only that, but before we know it, uploading such large files on our web server will quickly max out our storage capacity.

To crop and resize images, you will need photo editing software. Photoshop, the most popular professional software, is expensive and has a steep learning curve. Photoshop Elements is not so expensive (about \$100) but if you're not familiar with digital photo editing, it too requires significant time and diligence to learn basic techniques.

Good news! There are free alternatives, including **Photoscape** (for Windows), and free online photo editing software, such as **Pixlr**, illustrated on the right. (<http://pixlr.com/editor/>). Online photo editing applications require that you first upload the image you want to edit. Then you edit the image and download it to your computer. (Rename the edited file so you won't accidentally over-write the original.)

The most useful image dimension for our website is 250px wide, horizontal format. That's not to say you can't use square or vertical images. But more often than not, because of the way that the text of our rather short "stories" wraps around pictures, horizontal images permit a side-by-side alignment that assists page layout.

Once you have an image suited for the website, you're ready to upload it to the our web server.



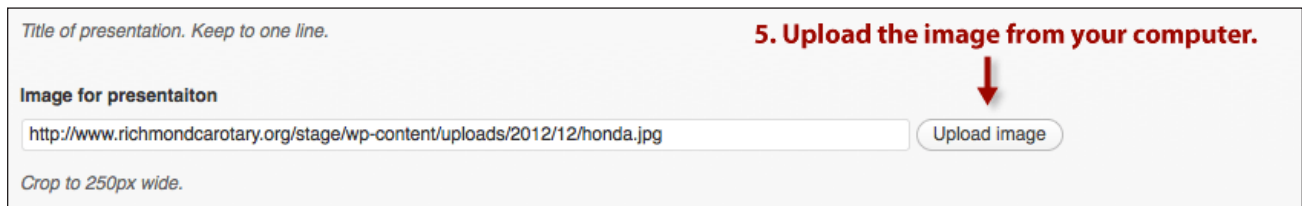
Pixlr online photo editor

Uploading picture from your computer to the website

Assuming you're logged in, go to the **Dashboard** and choose **Upcoming Programs** from the sidebar menu. From the next screen, the "table of contents" for Upcoming Programs, click the date of the post in which you want to insert the picture.

The **Edit Upcoming Program** screen appears (it's titled **Add New Upcoming Program** before you've saved your work the first time).

About halfway down the screen, look for a box entitled **Upcoming Programs**. You'll see the Title of presentation you entered earlier. Below that you'll see a button, **Upload image**. Click it.



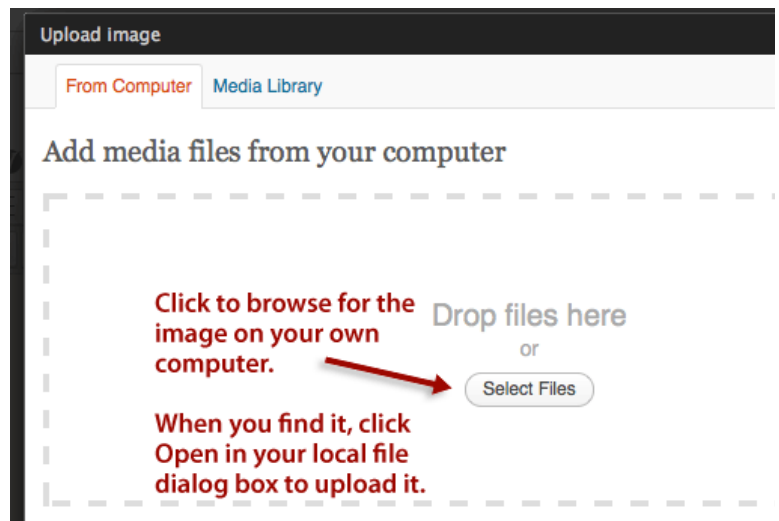
This screenshot shows a form titled "Add New Upcoming Program". At the top, there is a text input field with the placeholder "Title of presentation. Keep to one line." Below this is a section labeled "Image for presentation". It contains a text input field with the URL "http://www.richmondcarotary.org/stage/wp-content/uploads/2012/12/honda.jpg" and a button labeled "Upload image". A red arrow points to the "Upload image" button, and a red text label "5. Upload the image from your computer." is positioned above it. At the bottom of the image section, there is a note "Crop to 250px wide."

A moment later, the **Upload Image** screen appears.

The upper left of the screen provides tabs for at least 2 options: upload an image from your computer (**From Computer**), or choose an image from among those already uploaded to the website (**Media Library**).

If it isn't already selected, click the tab **From Computer**.

Then click the **Select Files** button. Your computer's file selection box will open. Navigate to the directory that contains the image you prepared earlier and click the button at the bottom of the file box, labeled **Open** (or **Upload**).




This screenshot shows the "Upload Image" screen. At the top, there are two tabs: "From Computer" (selected) and "Media Library". Below the tabs is a large dashed box with the text "Add media files from your computer". Inside this box, there is a red text label "Click to browse for the image on your own computer." with a red arrow pointing to a button labeled "Select Files". To the right of the "Select Files" button, there is a text label "Drop files here or". Below the dashed box, there is another red text label "When you find it, click Open in your local file dialog box to upload it."

The screen that appears next (see next page) provides options for setting the display dimensions of the file, which you'll need if you haven't already cropped the image to size.

After your image is uploaded this screen appears.

Maximum upload file size: 8MB. After a file has been uploaded, you can add titles and descriptions.

journalism_students [Hide](#)



File name: journalism_students.jpg
File type: image/jpeg
Upload date: January 7, 2013
Dimensions: 300 x 189

[Edit Image](#)

Title * journalism_students **1. Default for title is the file name. No spaces; use underscore or dash to separate words. Choose title suited for search by others (keep it obvious).**

Alternate Text 2. Students talking in class
Alt text for the image, e.g. "The Mona Lisa"

Caption
Caption, if you want one, can be inserted in the Edit Upcoming Program screen.

Description

Link URL 3. We don't use a Link URL. Click None if a URL appears.
None File URL Attachment Post URL
Enter a link URL or click above for presets.

Types 6. **Use as field value** 4.

Alignment
☐ None ☐ Left ☐ Center ☒ Right

Size 5.
☐ Thumbnail (150 x 94)
☒ Medium (250 x 157)
☐ Large
☐ Full Size (300 x 189)

[Save all changes](#)

1. By default the image file name becomes the **Title**. Titles should not have spaces; use a dash or underscore to separate words. With hundreds of images on the website, take care to name images so that they can be easily found by another person searching the **Media Library**. Use obvious, descriptive names.

2. **Alternate Text** is for blind or visually-impaired users. Disabled people use software on their computers that reads aloud page text, including the Alternate Text of images. "Alt text" briefly describes the image. Supplying "alt text" is good practice but not required. Again, it must be short and descriptive.

3. If the **Link URL** is supplied, then clicking on the small image within a post opens another page in which the full size image appears. Since we don't upload large images (full page width, for example), we don't need to link the image to a secondary page to display it. That's what the Link URL enables. Leave it blank.

4. Choose **Align Right** and **Size: Medium** (Regardless of the size you choose, Wordpress will crop images to preserve proportions of the image you choose.)

5. Most important: Click **Use as field value** when you're done. This inserts the image into the post. Even though you inserted it here, that image is available for insertion into other posts and pages. You access stored images through the **Media Library**. We'll look at that in some detail later.

Preview and Save Draft of the Upcoming Meeting post

You've inserted the image and you're almost done. Click **Preview** to view the post, and if you need to make any other changes, return to the edit screen by clicking the "Edit Upcoming Programs" link in top menu bar of the preview screen, as shown earlier.

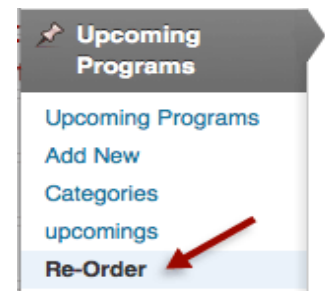
If it looks good, then click **Save Draft**. There's just one more step before publishing the post.

Put posts in chronological order

Remember that *only the 3 most recent posts* appear in the sidebar. If we created and saved **Upcoming Posts** strictly in chronological order, then the display order would take care of itself. But we create the posts in the most efficient way possible: several of them at once, or when the program information is confirmed.

Therefore, after creating the post we need to manually set the display order. That's done in the **Re-order posts** screen, shown below. It's not hard.

From the sidebar menu, choose Re-order. The **Upcoming Programs Re-order** screen appears.



A screenshot of the 'Upcoming Program - Re-order' screen. At the top is a header with a pin icon and the text 'Upcoming Program - Re-order'. Below this is a list of dates: January 18, January 26, February 1, February 8, February 15, February 22, March 1, April 1, December 28, January 4, and January 11. A red arrow points from the 'January 18' date to the 'January 11' date, indicating a move. To the right of the list are three red text instructions: 'Rearrange the order of posts (default is last-saved date) into reverse chronological order: most-recent first.', 'You'll see that past Upcoming Program posts have been moved to the bottom of the list.', and 'After posting each Flywheel, we move the Upcoming Program for the current week to the bottom of the list on this screen.' At the bottom left is a blue 'Update' button. A red arrow points from the 'Update' button to the text 'After arranging the posts chronologically, click Update.'

This click-and-drag interface is self-explanatory. Click on a post and, holding down the mouse button, drag it into a new position to place it in chronological order. Because the schedule of upcoming presentations (posted in the calendar on our website) inevitably has gaps in it, we cannot create a continuous run of Upcoming Program posts. Our goal is to make sure at least the first 3 or 4 Upcoming Program posts are complete.

Note that post *after* the current date gets moved to the bottom of the list. We do this as part of the weekly Flywheel maintenance, so don't concern yourself with this now.

Click **Update**. Now go back to the **Edit Upcoming Program** screen, and click **Publish**. You're done!

The Flywheel: a post inside a page

Like **Upcoming Programs**, **The Flywheel** is also a post; the most recent Flywheel replaces the previous one. But unlike Upcoming Programs, The Flywheel appears in the *main body* of a page, not the sidebar.

Note this: The *page* in which The Flywheel appears is a *frame* that also includes a sidebar with dynamic content: the **Flywheel Archive** and **Upcoming Programs**. Occasionally we add special, temporary content to the sidebar as well, like the Crab Feed announcement with its PayPal button.

As an editor, you'll never change the site's home page, in which **The Flywheel** appears. Instead, you'll create *Flywheel posts* that appear in the body region of this page on a weekly cycle.

The other components of the home page are automatically updated by widgets (specialized components, like the archiving widget that generates links to earlier Flywheels), or manually by the webmaster (like the occasional addition of special content, like the Crab Feed announcement).

Parts of Richmond Rotary home page

The screenshot shows the Richmond Rotary website. The header includes the Rotary Club logo, the text "ROTARY CLUB Richmond, California USA", and the motto "Service Above Self". Navigation links include "The Flywheel", "Members Directory", "Meetings", "Calendar", "About", "Current Projects", and "Log in".

The Flywheel: A red box highlights the main content area. A red arrow points to the "NEXT MEETING: FEBRUARY 1, 2013" section, with the annotation: "The Flywheel: a post that changes weekly". Below this is a "Local Rotarians Climb World Summits" article with a photo of a person on a mountain. Further down is a "MEETING OF JANUARY 25, 2013" section with a "Welcome" message from Jim Young, Club President.

Flywheel archive: A red box highlights the "Flywheel archive" widget on the right sidebar. It shows a list of dates from 2013 (January 1, 2013 to January 4, 2013) and 2012. A red arrow points to this widget with the annotation: "Flywheel archive (a widget with dynamic content)".

Upcoming Programs: A red box highlights the "Upcoming Programs" widget on the right sidebar. It lists events for February 8, 15, and 22. A red arrow points to this widget with the annotation: "Upcoming Programs: a widget that shows excerpts of last 3 posts in this category".

Creating Flywheel posts

The method for creating Flywheel posts is essentially the same as that for Upcoming Programs. And since you don't need to re-order these posts (because Flywheels *are* created chronologically, one week after the next), the procedure is simpler.

Essentially, you copy notes from the Flywheel template (the Word document that scribes prepare) and paste them, section by section, into the pre-defined text boxes (Announcements, Welcome, Recognitions, and Program), insert pictures, and check the correct category ("Flywheel"). The Upcoming Programs is just copied and pasted from that week's Upcoming Program post. (It's helpful to open NotePad or TextEdit on your desktop, to have a place to store copied text or picture URLs while you're creating the Flywheel.) You click the **Save Draft** and **Preview** buttons (upper right, in Publish box), then review your work. Note that the previewed page shows the post itself not the post inserted into the Flywheel homepage that you usually see. Don't freak out if you don't see the sidebar in your previews.

You'll probably see things you want to change. Go back and make the changes. When you have things the way you want, click the blue Publish button.

The new Flywheel post appears on the home page.

Of course, the devil is in the details. Let's get into them.

From the sidebar menu of the administrative section, click **Flywheel > Add New**. The **Add New Flywheel** screen appears.

So you don't forget to do it later, begin by finding the **Categories** box in the right column and check "Flywheel".

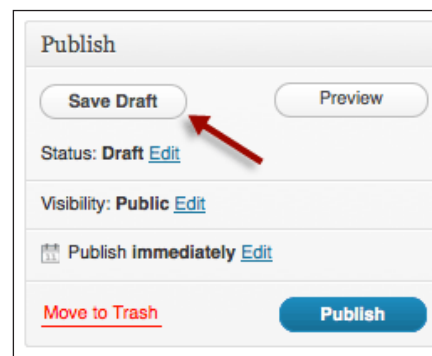
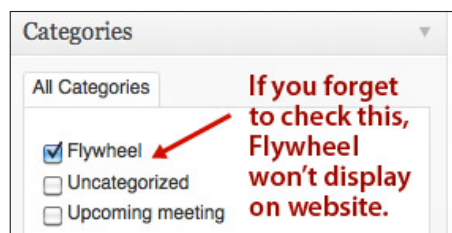
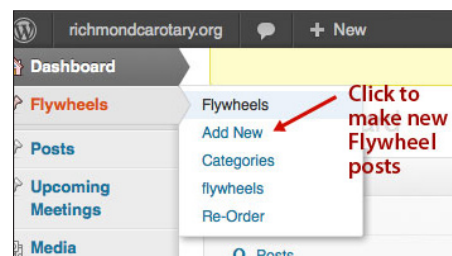
(Remember our earlier note about Screen Options, bottom of page 6: If you don't see **Categories**, click **Screen Options** in the upper right screen, and check the Categories box.)

Begin by entering the date of the next meeting, including the year, in the two top boxes.

In the right sidebar, check the category "Flywheel". As mentioned above, then click the button **Save Draft**.

Oops control

Don't click **Publish** yet, otherwise this virtually empty Flywheel will appear on our home page! If you *do* accidentally publish it, you can "unpublish" by changing clicking Edit next to the phrase "Published on", then change the date to some point after the current date. You'll change it back to the current date when you're ready to publish.



Upper part of Edit Flywheel screen

Edit Flywheel [Add New](#)

February 1, 2013 ← **1. Enter next meeting date same in both boxes.**

Permalink: <http://www.richmondcarotary.org/flywheel/february-1-2013/> [Edit](#) [View Flywheel](#)

Flywheel content


Next meeting date
February 1, 2013

Title, above, is the same as date of next regular meeting, entered here. Format: March 4, 2012

Title of presentation
Local Rotarians Climb World Summits ← **2. Copy the Title, Description and Image URL from the Upcoming Programs post; then paste it in these boxes.**

Title of presentation. Keep to one line.

Upcoming program description
Click the Upcoming Meetings tab in left-hand column, and in next screen, open the posting for this week. Copy the text from there and paste it here..

Upload/Insert 


"Buddies and I, including the world renowned Jon Lawlis, have summited at least one of the Seven Summits, ie, the tallest mountain on each continent. Jon summited Mt. Kilimanjaro a few years ago. I've now summited 3 of the 7 and have given numerous presentations about the Mt. Elbrus, Russia ascent (dodging terrorist attacks, colleagues getting blown off the mountain, climbing in sub zero temperatures, i.e., -30F, and succumbing to acute mountain sickness) and the Mt. Aconcagua, Argentina ascent."

- James Brandt

Path: p

Image for next meeting
<http://www.richmondcarotary.org/stage/wp-content/uploads/2012/12/kilimanjaro.jpg> [Upload image](#) [Add Another Field](#)

Click the Upcoming Meetings tab in left-hand column, then open the posting for this week. Copy the image URL from there and paste it here.

 ← **Clicking this link opens the Upload Image dialog. If your image is in the Media Library, you can get its URL by clicking this link and then searching the Library to obtain its URL.**

After inserting the text and image URL indicated above, you're ready to add the meeting notes, and summary of last week's program. Please see the next page.

As we said earlier, the **Edit Flywheel** screen has pre-defined text boxes that match both our meeting agenda and The Flywheel format: Welcome, Announcements, Recognitions, Program.

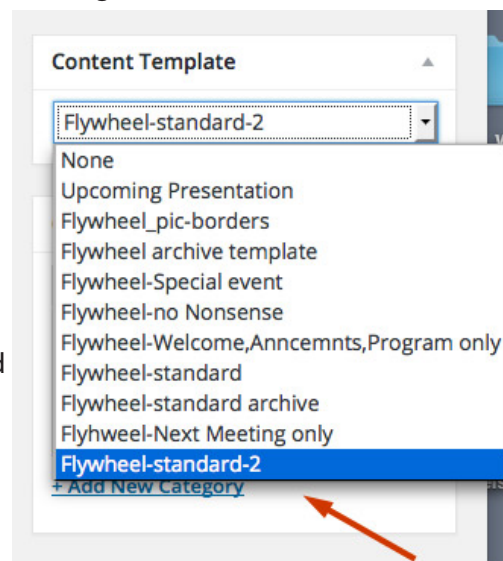
We created WordPress Content templates for the Flywheel, which provides “hard-coded” headlines above the text entered into the sections’ fields.

You need to choose the right Content Template to display the correct headlines and sections.

Do this in the **Content Template** box in the top upper right column. Choose the Content Template “Flywheel-standard-2” before previewing or publishing the post.

(If you don’t see the Content Template box, it may not be displayed on your screen. Choose it from the Screen Options, as described near bottom of page 6.)

Choose the Content Template “Flywheel-standard-2” before previewing or publishing the post.



You will notice that even if you don’t add any content to those text boxes, the headlines appear in the finished post. On the right you see an incomplete post in which most of the fields have been left empty.

We sometimes need headlines that are *not* defined within the template because they may or may not be necessary for any given Flywheel. Examples are **Rotarians with Guests, Visiting Rotarians and Sunshine Report**.

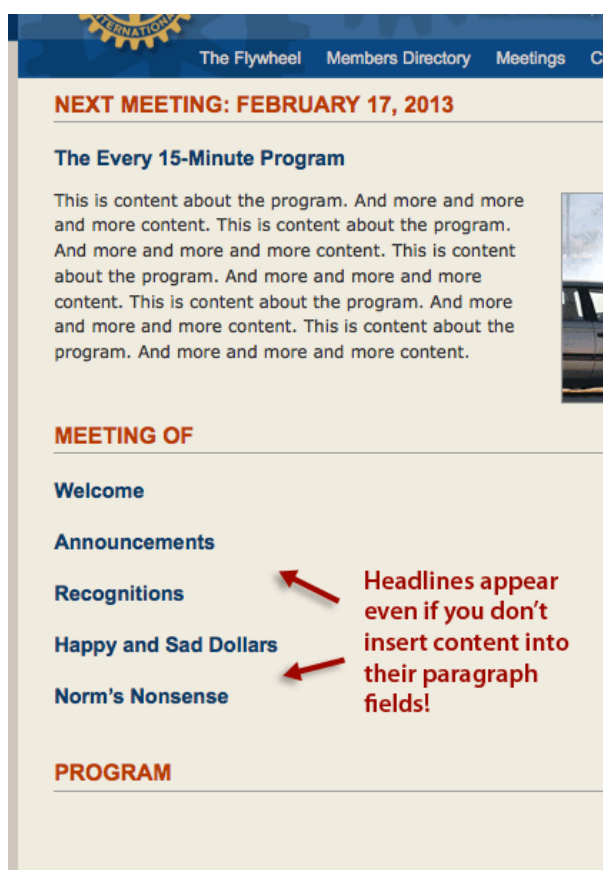
On the next page we’ll cover how to add that special case headline.

In the event you need to add a special headline, simply enter the words of the headline in the *proper text box* (e.g., Rotarians with Guests goes inside the Welcome box), then format it as Heading 3.

Formatting an occasional headline is simple. In the formatting bar above the text field, notice the **Paragraph** drop-down menu (far left, second row of icons).

First select the text, and from the drop-down menu, choose **Heading 3**. Note: if the selected text is not a separate paragraph—that is, not separated from what follows by a line break—then the Heading 3 attribute will be applied to the entire paragraph.

It’s easiest to fix this in the Text mode. Look for the `</h3>` closing tag (mean-



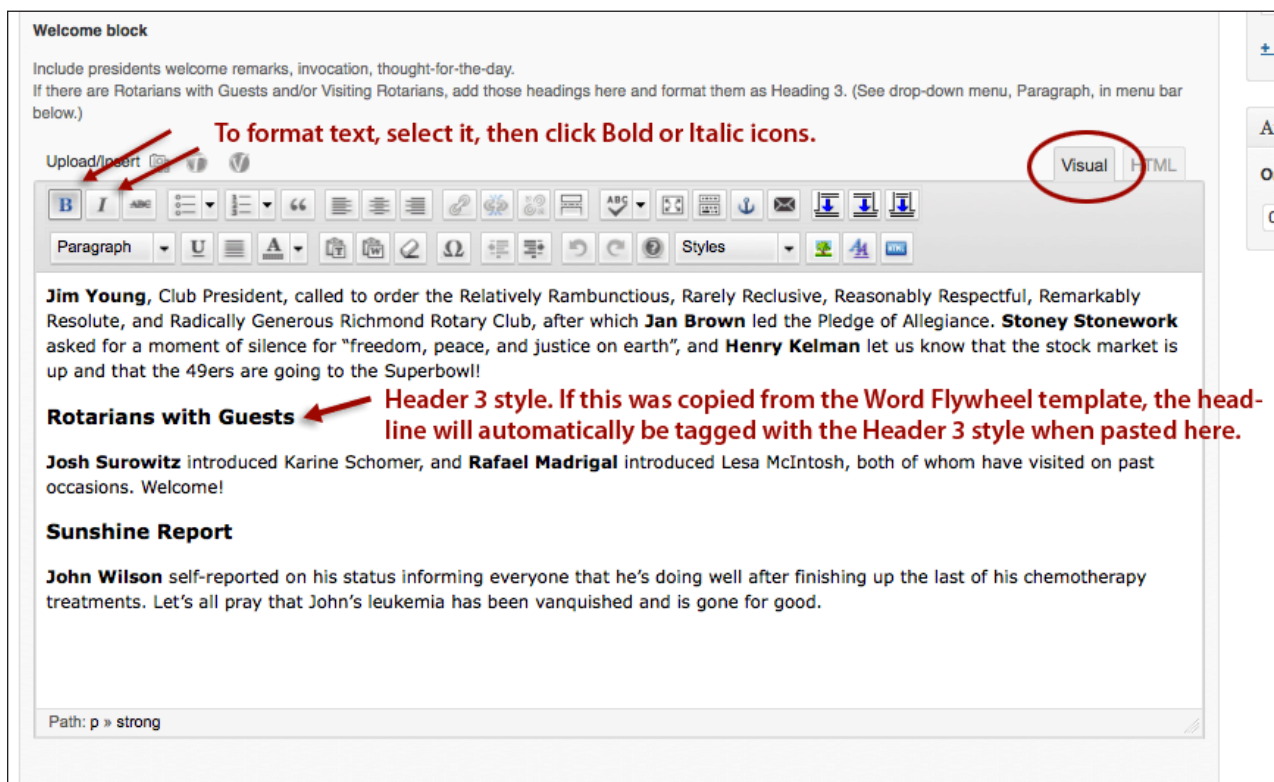
Inserting text

Before entering text, choose the **Visual** tab in the upper right. If you've already created your notes using the MS Word Flywheel template, you can simply copy and paste the text from there into the correct fields (Welcome, Announcements, etc.) on the Edit Flywheel screen.

To format text as bold or italic, select the text then click the Bold or Italic icons in the formatting bar .

In the event you need to add a special headline, simply enter the words of the headline in the *proper text box* (e.g., Rotarians with Guests goes inside the Welcome box), then format it as Heading 3. Formatting a headline is the same as formatting for bold or italic. Select the text. Click the format button.

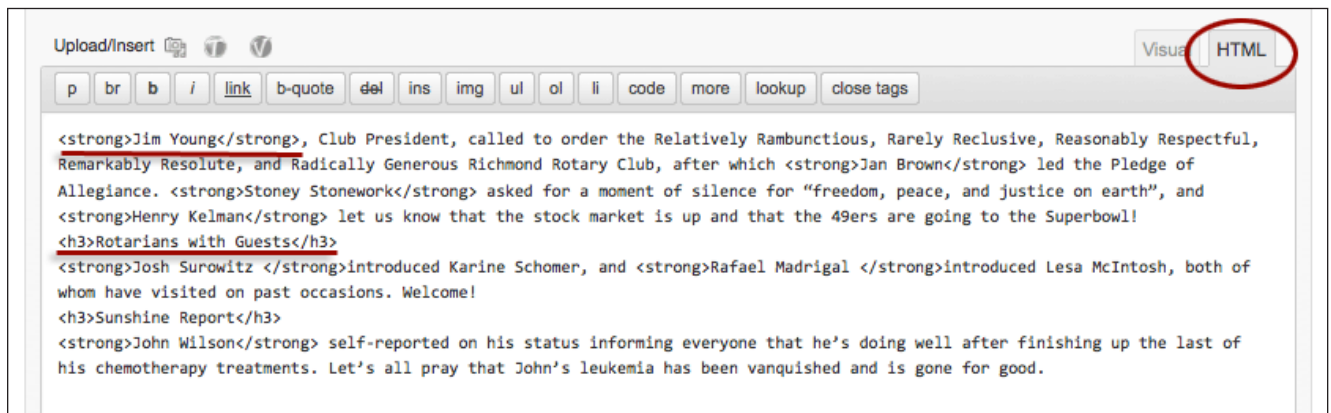
It helps to know something about HTML formatting, which you can see in the Text window. For Header 3, or `<h3>` to be applied, the code must have an "opening" and "closing" tag wrapped around the text you want formatted: `<h3> This is the headline</h3>`.



If you've tried to apply the header tag to several words that are actually part of a complete paragraph, even though those words are separated by a line break in the Text mode, the *entire* paragraph will be formatted h3. The headline must be separated from the following text by a regular paragraph return for its formatting to be confined only to the headline.

Again, this all becomes clear if you view the text box in the **Text** , rather than the **Visual**, mode. To do that, click the HTML tab in the upper right of the text entry box. (on earlier versions of WordPress the Text mode was labeled HTML, which you see in our screen shots. I guess the developers thought "HTML" might scare off some people.)

HTML mode of the *Welcome* text box



Note that bold formatting uses the HTML tag, `` and ``. The formatting begins with the opening tag and ends with the closing tag.

The other text boxes in the **Edit Flywheel** screen are edited in exactly the same way.

The formatting bar above each text box (the options change depending on whether you're in the Visual or HTML mode), also permit you to create bulleted lists, change alignment (we consistently use left-aligned except for sidebar announcement boxes), and to insert images that adjoin a given section of text. (These images would be in addition to the pre-defined image insertion fields. More about this in a moment.)

To insert an image, click the camera icon next to the words Upload/Insert above the text box.



The technique for inserting images or pdf files and their links involves the same dialog box you saw earlier. Though the method is not difficult, it does involve several steps and a sequence of screens. We won't try to explain it here. Depending on your learning style, you can learn this method by trying it yourself or by searching *YouTube* for a brief video that walks you through the process.

Use the **Preview** button to view your efforts as you go. As long as you don't click **Publish**, no one can see your work. Previews appear in a separate posts window, not the Flywheel home page. The preview template doesn't match the published view exactly. Spacing below the top most headline is tighter than it is on the published view.

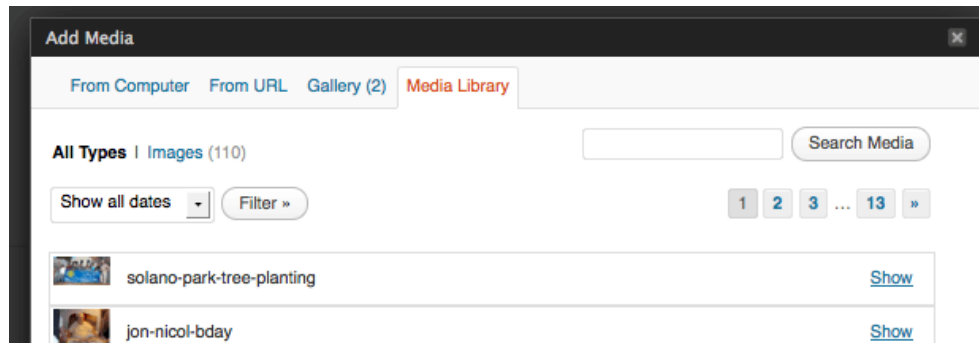
Note that the template includes 2 pre-defined image insertion fields. You used one already: **Image for next meeting**. You saw that you could get the URL for this image from the Upcoming Program post, or by searching the Media Library for an image.

The second pre-defined image insertion field is **Image for Last Program**. This picture is already on the website since it was used for the Next Meeting field of the Flywheel last week. As you did with the Upcoming Program image, you can either go to last week's Flywheel to copy the image URL of that image, or you can click Upload Image and search the Media Library. (Please see next page.)

Media Library

After only a few months since launching the new Wordpress website, the Media Library contains over 100 files. The number will grow into the thousands. Therefore, get familiar file searching and filtering.

1. Filter the list of files by date (e.g., show only January 2013)
2. Search by name (you must know or guess the file name)
3. Show all files or images only (the library may contain pdfs)
4. In all instances, you click through multiple pages of file names and thumbs: 1, 2, 3... 27 >>



After finding the image (or pdf) you want to insert into the post, click the [Show](#) link. The dialog box opens that you used in the **Upcoming Programs** section earlier (page 10).

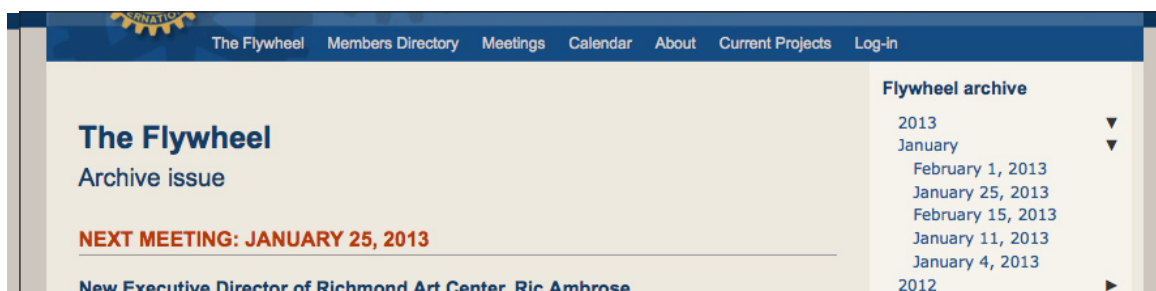
Sign your work

The last field in the Edit Flywheel screen is the easiest: **Scribe**. Add your name and job title (a lot of flexibility here!). The text entered into this box will be automatically formatted (italic, font size is 80% of body text).

After you've previewed your work, click the **Publish** button. The Flywheel you created now appears on the home page of the website.

One Last Step: set previous Flywheel to use archive template

Previous issues of the Flywheel use a different template than the current issue. The main difference is that when you click a link for a previous issue in the Flywheel Archive box in the sidebar, that issue appears with the words "Archive Issue" appears below the main title, **The Flywheel**.

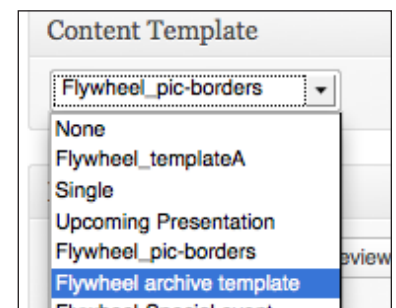


The archive template must be manually applied to the previous issue of the Flywheel. Easy.

Click Flywheels in the sidebar. A list of recent Flywheels opens. Click Edit in the small menu that appears when the mouse rolls over the date of the previous week's Flywheel.

In the next screen, look for the Content Template box in the right column. From the drop-down menu, select "Flywheel archive template".

Click the **Update** button immediately below the menu. You're done.



Pages

Repeating what we wrote at the onset, pages are text and pictures that are displayed on the website. They remain unchanged until you edit that content or delete the page. In that sense, Wordpress pages are “static”. Unlike posts, pages don’t have categories or publication dates that govern where and what in order they are displayed. To provide public access to pages, we place links to them in our navigation menu at the top of each page.

A few of the pages on the Richmond Rotary site are **Meetings, About, Current Projects, and Committees and Officers**. Links to some of these pages appear in drop-down menus from the main navigation bar items.

As an editor you don’t need to worry about this. We rarely build new pages for the Richmond Rotary website, and when we do, the webmaster will take care of creating it and providing menu links. (The **Holiday Auction** page, for instance, is created in late November and is removed after the Auction is over. A link to that page is placed in the menu bar, then removed when the Auction is over.)

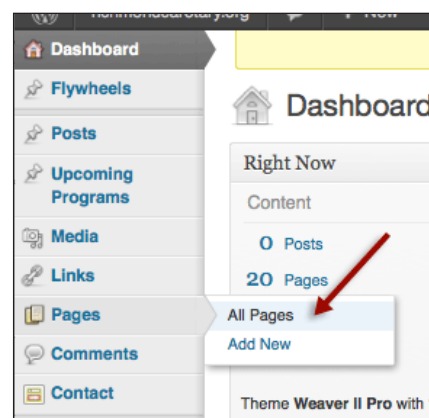
Although you won’t be creating new pages, you may be asked to update or edit text on an existing page. Doing this is quite straightforward.

Editing existing pages

Log into the website, and from the left column menu in the Dashboard, choose **All Pages**.

The next screen that appears lists all the pages in the website, or if you’ve selected a date filter, those pages published during a chosen period.

If you don’t see the page you’re looking for, it’s because there are too many to fit on this first screen. Use the buttons in the upper right to view the second page.

A screenshot of the WordPress 'Pages' management screen. The left sidebar shows the 'Pages' menu item selected. The main content area shows a table of pages. A red arrow points to the '1 of 2' pagination link, indicating that some pages may appear on a second screen.

<input type="checkbox"/>	Title	Author	Date	ID
<input type="checkbox"/>	Past projects	admin	2012/07/29 Published	60
<input type="checkbox"/>	Projects	admin		
<input type="checkbox"/>	About	admin	2012/07/29 Published	54
<input type="checkbox"/>	Document archive	admin	2012/07/29 Published	41
<input type="checkbox"/>	Committees & Officers	admin	2012/07/29 Published	36
<input type="checkbox"/>	Meetings	admin	2012/07/29 Published	34
<input type="checkbox"/>	Members Directory	admin	2012/07/29 Published	32

This is the same kind of “table of contents” display you saw for Upcoming Programs and Flywheels. Roll your mouse over the title of the page you want to edit and from the small group of links that appear below the title, choose “Edit”.

The **Edit Page** screen now appears. Now you can select and replace text in the main editing box. Make your changes, being careful to observe paragraph returns after headlines. If you get unexpected results, click to the HTML view and see where the line breaks and HTML tags are occurring. After you've made the changes and your happy with the way things look (Preview Changes), then click Update. You're done.

However you may notice two things:

1. Some pages have pictures included in the main editing box, rather than designated in a separate "custom field" below the main editing area.
2. The sidebar that you see on the page in the public site doesn't appear on the **Edit Page** screen.

The images on pages (maps, photos) are added manually, using the method described above (Edit Flywheel, page 17). Since images on pages are more permanent than those used in our weekly posts, please leave the task of editing and placing new images to the webmaster.

Even so, in the process of adding or editing text you may inadvertently alter the code that places the image on the page. **Revisions** to the rescue! This function, enabled by a box at the very bottom of your **Edit Page** screen, lets you revert back to a previously saved version of this page.

Revisions box doesn't appear?

As mentioned earlier, WordPress lets you hide or reveal functions selectively to reduce screen clutter. If the **Revisions** box doesn't appear, open **Screen Options** (tab in top right screen), and check Revisions. While you're there you may also notice that WordPress has options for Discussion, which places comment boxes at the bottom of pages so that visitors can add suggestions, reactions, or whatever. We don't allow comments on the Richmond Rotary site; moderating and responding to them would require more time than anyone, thus far, can give it.

Revisions

[31 January, 2013 @ 21:33 \[Autosave\]](#) by Nick
[31 October, 2012 @ 2:22](#) by admin
[12 October, 2012 @ 13:35](#) by admin
[12 October, 2012 @ 13:33](#) by admin
[12 October, 2012 @ 13:28](#) by admin
[12 October, 2012 @ 13:28](#) by admin

Back to **Revisions**. In the Revisions box, click the most recent time and date link that you want to restore. A second screen opens. Notice the title at top of the page, which shows a particular time and date. At the bottom of this screen, you see other time/date links. Clicking one of them changes the display of code at the top, thereby letting you choose which version of the page you want to restore. When you have the version you want, click **Restore**. The earlier version of the page is once again available in your editing screen. If you've chosen the wrong version you can go back and choose another.

Revision for "[Current Projects](#)" created on 31 October, 2012 @ 2:22

Title	Current Projects
Content	<pre><h2 style="margin-top: 0;">How is Richmond Rotary helping?</h2> </pre>

You can now again edit the page, preview changes, and when you're satisfied, click **Update**.

Sidebars

The sidebars of pages, as mentioned in our introduction, are generated by custom modules called widgets. Because the creation of sidebar content and its assignment to particular pages both require a familiarity with HTML, access to the widgets is not included in the Editor user role. You'll need to ask the webmaster to edit or add sidebar content.

This completes the Richmond Rotary Website Maintenance Guide. Congratulations for getting through it!