# New Mexico MESA Website Users Guide

## Prepared by John Davis, IT Manager

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# General Information

1. The website address is [www.nmmesa.org](www.nmmesa.org).

2. The website designer and developer was Ray Gulick, Evo Web Deveopment; PO Box 4188; Santa Fe, NM 87502.  Phone: 505-577-4002.  Fax: 505-466-8292. Email: ray@evowebdev.com

3. Three unsuccessful login attempts will block access from that computer for 15 minutes.

4. The entire website is backed up each Saturday, automatically by a plug-in called Backup Buddy and which is available from the Dashboard.  If a restore is necessary the following information will be needed:

| Information for restoring the MESA Website: |
| --- |
| **ImportBuddy Password** |
| migrate_nmmesa23 |
| **DB Info** |
| DB name: nmmesaor_wp |
| DB user: nmmesaor_wp |
| DB password: V8uK2edss&CD45y |

## Updating Your WordPress User Profile
*(Note: This does not update Regional Coordinator information on the Region page.)*

1. Open the website with your web browser.

2. Logon using the "Login" link in the lower right corner of the webpage.

3. Click on User > My Profile

4. Make changes, including changing your password if desired.

5. Click Update Profile to save your changes

## Creating an Advisor Account

1. Open the website with your web browser.

2. Logon using the "Login" link in the lower right corner of the webpage.

3. Click on Users > Add New

4. Enter:

    a. Username (first letter of first name and last name is recommended)

    b. Email

    c. First Name

    d. Last Name

    e. Website (can leave blank)

    f. Password (same as user name with additional digits, if necessary, until the strength indicator is at least medium).

    g. Send Password – check this box

    h. Role – select Advisor

    i. Click Add New User button

## Creating a News Item

1. Open the website with your web browser.

2. Logon using the "Login" link in the lower right corner of the webpage.

3. Click on News > Add new

4. Enter news headline

5. Enter Event Description (include links to any pertinent resources that you want viewers to have access to, possibly in the Left Sidebar Note)

6. Create a left sidebar note if desired, and add More Info link if desired.

7. Add quote and quote author if desired

8. Indicate which regional pages should display the news item.  (Statewide news – check all; Regional news – check applicable region(s)).

9. Add an Excerpt (a short 1-2 sentence summary of the news item.)

10. Add pictures as desired.

11. Click the Update button before leaving the page.

## Creating a New Event
*Note: Documents that will be linked to from this event should be saved in PDF format prior to beginning these steps.*

1. Open the website with your web browser.

2. Logon using the "Login" link in the lower right corner of the webpage.

3. Click on Events > Add new

4. Enter Event name

5. Enter Event Description (include links to any pertinent resources that you want viewers to have access to.)  To upload these resources:

   a. Convert your document to .PDF so that it is faster to load and does not require that the user have the right software to open it.

   b. Place your cursor where you want to insert a link into the document and type the text of the link.

   c. Click Add Media above the tool bar

   d. Click Upload Files.

   e. Click Select Files

   f. Double click the file you wish to upload.

   g. Wait for the upload to finish.

   h. Once the document has uploaded, highlight and copy (Ctrl-C) the URL for the document which is listed in the Attachment Display Settings (starts with http:// and

ends with the name of the file you just uploaded).  <u>DO NOT click the "Insert into post" button at the bottom of the page.</u>

    i.   Close the Media screen and return to the New Event screen.

    j.   Highlight the text that you wish to be a link to the document

    k.   Click the hyperlink icon   in the menu above.

    l.   Paste the URL you copied into the URL box.

    m.   Title is not required.

    n.   Check the Open link in new window/tab checkbox.

    o.   Click Add Link button.

    p.   Repeat for other documents that you wish to provide a link to.

6. Add quote and quote author if desired

7. Enter Location

8. Enter Order date and Event date

9. Check <u>all</u> user types so that the event appears on all user pages.

10. Indicate which regional pages should display the event.  (Statewide events – check all; Regional events – check applicable region(s).

11. Enter Date and Time in "human" format.

12. Enter venue name and address.

13. Locate Google Map Link for this address and enter it.

14. If using Cvent for registration, enter link.

15. Enter Short Detail Note and More Info link if desired.

16. Excerpt – Enter a 1 to 2 sentence version of the event description.  If you don't add your own text here, WordPress will take the first few hundred characters of your description and use them.

17. Content Permissions – leave all unchecked

18. Add pictures as desired.

19. Click the Update button before leaving the page.

## Updating a Regional Page

*Note: News items and events are created and updated as separate items. You should not attempt to update them from this page.*

1. Open the website with your web browser.

2. Navigate to the page you wish to update.

3. Logon using the "Log in" link in the lower right corner of the screen.

4. Click "Edit Region".

5. Update or add information as necessary.

6. Click Update to save your changes.

7. Click View Region to view your changes.

## Uploading Pictures and Documents for use on the website

Resources can be pictures or documents.

Pictures are displayed on most pages as items of visual interest. Pictures are also attached to events (both upcoming and past) and to news items as repositories of pictures taken during the events or associated with the news items. News items typically only contain one photo whereas events contain galleries of pictures taken during the event.

Documents fall into two categories, resources or media:

- Resources are reference documents that exist year-to-year with only minor edits each year. They appear in the list of resources available on the website. Examples include MESA forms, handbooks, user guides, etc.

- Media includes documents that will be linked to from events or news items, and are specific to that event or news item. Examples would include agendas, event handbooks, advisor memos, etc.

## Preparing Photos for Upload

1. Download the photos from your camera to a folder on your local computer drive.

2. Decide which photos you want to use on the website and save them to a new folder on your local drive.

3. Rename each photo to describe its subject.

4. Crop and resize the images for the website:

   a. Open the folder, which you created in step 2 above.

   b. **Right-click** on the picture you want to resize or crop

   c. Select **Open with** and choose **Microsoft Office Picture Manager**

   | Open with | ▸ | 🖼 Microsoft Office Picture Manager |
   |---|---|---|

   d. Select **Edit Pictures…** from the top toolbar.  🖼 Edit Pictures...

5. To crop a picture
   *You would crop or trim some of the picture first before resizing*

   a. On the right side click on **Crop**  ⊹ Crop

   b. Using the **resizing handles** select the part of the picture you want to keep.

   c. Click **OK** button to keep the changes

6. To resize a picture
   *For **on-page picture** it must be a maximum of **338** pixels wide*
   *For a **slide image** it must be a maximum size of **800** pixels wide and **600** pixels height*

   a. On the right side click on Resize.

   b. If you are also wanting to use the picture for a large slide image then first resize to a maximum of 800 (w) x 600 (h).

   c. *Slide image: Use the* **percentage of original width x height** *to change the image to 800x600 or as close to that without going over in size. The reason to use percentage is that it maintains the image's proportions by constraining them. Otherwise it gets skewed*
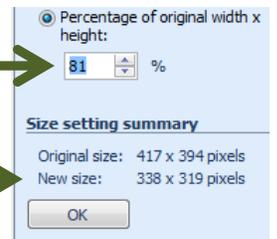
   d. *Check the **New size** information as you go till you reach the desired width and/or height.*

   e. *Click **OK** and then save the picture*

   f. On-page image: Use the **percentage of original width x height** to change the image to as close to 338 width, but not above 338. *The reason to use this selection is that it maintains the image's proportions by constraining them. Otherwise it gets skewed*
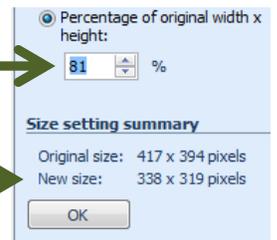
   g. *Check the **New size** information as you go till you reach the desired width and/or height.*

   h. *Click **OK** and then **Save as…** the picture. Put **sm** at the end of the picture name so you can tell them apart when uploading to the site.*

7. You are now ready to upload these photos for use with an event or a news item.

**Updating or Adding Pictures to an Event or News Item**

*Note: Photos must be prepared before adding them to an event or news item. See "Preparing Photos for Upload" before beginning this process.*

1. Open the website with your web browser.

2. Navigate to the news item or event you wish to update.

3. Logon using the "Log in" link in the lower right corner of the screen.

4. Click EDIT the page.

5. Click on Add an On-Page Image in the right hand column.

6. Click Upload Files and then Select Files

7. Navigate to where you saved the photos on your local drive. Choose the photo that you saved with a width of 338 and double click it to select it.

8. Provide On-Page Image Alt. text. <u>This is required or image will not display on the website.</u>

9. Enter picture caption (Although shown as optional, MESA requires captions on all pictures used on the website. Consider adding a note about clicking the photo to see other photos.)

10. If you want to attach additional photos, select "yes" under "Upload larger slide image?" to add a larger slide version of the on-page image. Upload the one that you saved as (800x600 pixels)

11. Select "yes" under "More Slides?" to add additional slides. Use the other photos that you saved as (800x600). You can select multiple photos and upload them all at once in this step.

**Uploading a Resource Document**

*Note: All documents should be converted to PDF format prior to uploading. Resource documents are used year after year with only minor changes (handbooks, forms, user guides, etc.) as opposed to "media" documents that are tied to a particular event or news item (agendas, memos, instructions, etc.). See the Creating an Event section for instruction on uploading media documents.*

1. Open the website with your web browser

2. Logon using the "Admin." link in the lower right corner of the screen.

3. Click on Resources > Add New

4. Enter a title for the Resource

5. Either enter the Webpage Link if resource is a webpage, rather than a downloadable resource. Paste entire URL starting with http:// <u>OR</u>

6. Click Add File > Upload Files to select the file you wish to upload as a resources

7. Click Select

8. Enter a short description of the Resource that will appear with it in the list of Resources on the website.

9. Select User Type.  For Resources that should be available to the general public (including students and parents), check the Public and Students boxes.  For Resources that should only be available to Advisors or Staff, check the appropriate boxes.

10. Content Permissions – Leave all boxes unchecked.

11. Leave custom error message blank

## Uploading Media Files

Media files are uploaded so that links that point to the item can be created on events and news pages.  See Creating an Event for instructions for uploading media.

## Using videos on the website

Videos are NOT to be uploaded to the website because of their size and the bandwidth that they require to play effectively.  All videos should be uploaded to You Tube and a link to the video placed on the website. Most schools block You Tube so other options might be needed if you want the video for schools.

1. Logon to MESA's You Tube account:
    a. User name = [nmmesa83@gmail.com](mailto:nmmesa83@gmail.com)
    b. Password = 123mesa!

2. Upload the video file from your local drive.

3. When the upload is complete, copy the URL provided by "Upload complete! Your video will be live at: *url*"

4. Use this URL to create a link to the video on the website.

## Managing Volunteers

When a volunteer enters an application on the website, an email containing all the volunteer information is generated to the appropriate Regional Coordinator.  Upon receiving this email, the RC performs the steps below.  (If you wish to add a volunteer yourself, complete the on-line volunteer application yourself and then follow the steps below.)

1. Open the website with your web browser

2. Logon using the "Admin." link in the lower right corner of the screen to access the dashboard.

3. Click on Volunteers at the top of the page.

4. If the email indicated that this is an updated profile, use the search function on this page to locate the existing profile and Trash it.  Locate the volunteer's new profile.  (It will be noted as *Pending* and be near the top of the listing).

5. Click the Edit link under the volunteer's name.

6. Review the submitted information.

   a. If you wish to accept the volunteer, click the blue PUBLISH button on the right of the screen. Publish

   b. If you DO NOT wish to accept the volunteer, click the MOVE TO TRASH link on the right of the screen. Move to Trash
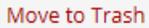
## Managing Alumni

When a MESA alumnus completes an on-line profile, an email message is generated to the staff member responsible for the Alumni portion of the website.  At this point the profile exists on the website but has not been published (viewable).  To publish the profile, follow the steps below.

1. Open the website with your web browser.

2. Logon using the Admin. Link in the lower right corner of the screen.

3. Click on Alumni in the top menu.

4. If the email indicated that this is an updated profile, use the search function to locate the existing profile and Trash it.  Locate the alum's new profile.  (It will be noted as Pending and be near the top of the listing.

5. Roll your cursor over the name and select Edit.

6. Read the profile and determine if it is appropriate for public posting.

7. To publish, click the Publish button.  To delete an inappropriate profile, click on the "Move to Trash" link.

## Uploading Student Profiles into MIMS

1. Open the website with your web browser.

2. From the Admin. Dashboard, select Forms > Import Export

3. Select Student Profile

4. Select all fields except the ones following "Income Range"

5. Enter the date range that you want to import i.e. since the last time a download was requested.

6. Click Download Export File.

7. Save the file as a CSV file type on the local drive.  (Example: *filename.csv*)

8. Log in to MIMS

9. Go to Tools > Admin > Batch Student Update

10. Browse to the file saved above.

11. Click Preview to allow MIMS to validate the information contained in the spreadsheet file. Records containing errors will be identified and the problems with each record noted.

12. Return to the downloaded spreadsheet and make corrections as necessary.  If the needed changes cannot be made (lack of information, etc.), contact the student, explain the problem and ask that a new profile be submitted from the website.

13. Return to MIMS Batch Student Update page again and preview the file once more to insure that all the initial errors have been corrected.  Repeat steps 12 and 13 until all errors have been corrected.

14. Browse to the corrected file once again.

15. Click on Upload.