Page Admin Guidelines for Town Website – DRAFT

1. Overview

Hilma Sumner is the Site Admin for the Town website. Hilma or a designee will create your page with the initial infrastructure and member information.

Each top-level page must have a *Files* section for documents relevant to your board or committee and a *Meetings* section for Agendas and Minutes. It may have other sections as you see fit, but it must have these two.

Note: Some existing pages also have a separate section for *Agendas,* or some page admins may upload them into the *Meetings* section*.* But if the agenda is uploaded along with the calendar entry, it will automatically appear on the committee page.

2. Rules

2.1 Documents should always be posted as PDF files.
This can be done using the Export function of most word processors. This ensures that the file can't be changed on the site and makes it unnecessary to download a file to view it.

2.2 File names should follow a naming convention that easily identifies (1) the Board or Committee, (2) the document date, and (3) the file name.

2.3 The agenda should always be posted as an attachment to the calendar entry
The advantage to this is that it is automatically uploaded and visible on your page under *Next Meeting* and all previous meetings are listed below it.

3. File Naming Convention

Use the file naming convention recommended by Montague Webworks:

BB_yyyy-mm-dd_filename.pdf
where **BB** is the full or abbreviated name of your board or committee
yyyy-mm-dd is the document date (not the post date).
filename as appropriate

Use leading zeros in the date to ensure the files sort in reverse chronical order.

Use underscores before and after the date and hyphens between the date fields. The underscores are not visible when the file is loaded. The hyphens make the date more readable.

Board of Health Example:

BoH_2021-05-25_Minutes.pdf displays on the page as ***BoH 2021-05-25 Minutes.pdf***

Council of Aging Example

COA_2021-05-25_Agenda.pdf displays as ***COA 2021-05-25_Agenda.pdf***

Do not use "Posting" or "Meeting Notice" in the name of your agenda. The notice or posting of meetings in Heath is done using a physical notice on the bulletin board in Sawyer Hall and Jacobs Road.

4. Attaching the Agenda to the Calendar Entry

You must be logged in to make an entry on the calendar.

1. From the town website landing (main) page, select your town entity.
2. Scroll to the bottom of the page to see the login link and click on it.
3. Enter the username and password provided to you by Hilma

    In the upper left corner, there will be a red RocketFusion icon which indicates a successful login.

4. Access the town calendar by:

    a. Going to https://townofheath.org/calendar
    b. Scrolling down the main page to the calendar
    c. Scrolling to the bottom of the Calendar of Events list on your page and selecting the link, *Go to Calendar* which will bring up the Calendar.

4.1 Make the Calendar Entry and Upload the Agenda.

Create or obtain the agenda before making the calendar entry so you can upload it when you enter the meeting in the calendar. But if it is not yet available it can be added later.

1. Go to the date in the calendar when the meeting will take place
2. Click the green plus sign to bring up the ***Add an Event*** screen.

3. Enter the relevant information for the Fields: ***Event Date, Start Time, End Time***, and ***Location.***

    Additional fields needed:

4. **Title:** enter your meeting title which will show up on the calendar.

5. **Department/Board:** from the drop-down list, select *Council on Aging*

6. **Board:** select *Council on Aging* (**it seems redundant,** but both these selections must be done if you want the agenda to upload automatically.)

7. Select ***Attach File*** to upload the PDF version of the file. To ensure the files sort correctly, use the naming convention*: COA_2021-02-08_Agenda.pdf*

    NOTE: leading zeros with single digit dates ensure your files sort correctly in reverse chronological order.

8. **Save** your changes and you are done.

When users click on the COA calendar entry it will bring them to the COA page and the Agenda will be there.

If you have already made the calendar entry, and wish to add the agenda—login, click on the calendar entry, and then click on edit. Follow the instructions above.

5. Uploading Files

Steps if you just wish to upload files,

- Login as the page admin.
- Go to the section where you want to add a file. You already have a Meetings section and a Files section.
- Select *Upload Files*
- In the box that opens, just drag the file into the box and then select Save
- Or at the bottom of window select *Add Files* to browse for files and upload

6. Adding Members to a Board

From the **https://rocketfusion.com/FAQ, Adding Members to a Board:**

"If a board has any empty seats you will see a long green button labeled **Add Member**. To add a member you simply click the button, which opens up a small form. In the name field, click the dropdown to choose from a list of existing people. Type in their Role on the board (chair, clerk, 1st alternative, etc), whether they're elected or appointed (people who are elected have their contact info displayed on the website), and the start and end dates of their term."

Adding someone NOT on the drop-down list

I was not able to follow the information in the FAQ to add someone that is not on the drop-down list. This capability seems to lie only with the Site Admin not the Page Admin. You will need Hilma to add that person.

7. Transitioning towards Standardization on Existing Pages

• Existing pages will be transitioned over time to have a *Files* and a *Meetings* section on the top level page.
• Any minutes or agendas, in the *Files* section will be moved to a Meetings section.

• File names will be changed to the format noted above.
Board/Committee_YYY-MM-DD_Minutes.pdf
Board/Committee_YYY-MM-DD_Agenda.pdf

8. Entering a Montague Web Works Page Problem or Bug

Go the Web Admin page: ***https://townofheath.org/p/1168/Web-Admin,*** and
 select ENTER A NOTE

   Entries are only visible when logged in). On the Web Admin page, under Web Admin Form, select Manage this Category. Then click on the blue box with the number.

		Open	Disp	Sort	Title	Category	Revw	Expt	Del?
✏️	👁️	☑️	☐	(	Email Tracker	Web Adr ⌄	2	2	☐
✏️	👁️	☑️	☑️	(	MWW Change Request	Web Adr ⌄	8	8	☐

Sample Agenda

NOTICE OF MEETING
MEETING AGENDA
Town of Heath
Board or Committee Title
Meeting Location or Virtual
Date

Call-In Information if it is a Zoom Meeting

Time Call Meeting to Order

Identification of Callers

Review Agenda

Review Minutes: Date(s) of Minutes Reviewed

Agenda Items