

# Oakland Hills Condominium Association

## Archiving Website Documents

### Basic Concepts & Procedures

Defining some basic concepts and procedures up front will help minimize repetition later on. For example, instead of repeating how to enter a particular editing mode every time it comes up, we can assume that it'll be understood as it has already been described here.

**Logging in:** Go to the website and click on "Login" at the bottom, right on the page. Enter your credentials (username and password) and hit Enter. Your dashboard will be displayed. Click on the website name at the top, left and the website will be displayed with a brown command strip at the top, giving you an easy access to editing the page and to go back to the dashboard.

This document will refer to the "Dashboard" and the "Website", the "Dashboard" being the editing part of the website and the "Website" being the website that visitors to the website will see. We will be going back and forth between these two, so you need to understand how to go from one to the other.

Go to the "Dashboard" by clicking on website name at the top, left of the brown strip and return to the website by doing the same thing, clicking on the website name at the top, left.

When you encounter an instruction to log into the website and you are already logged in, you don't need to log in again.

Please note that this is different from logging in as a resident to have access to the secured Resident Area. The login you will use here is the one described above, which gives you access to editing the website, a function not available to logged in residents.

**Editing Modes:** The website has three main editing modes, Classic Mode, Frontend Editor, and Backend Editor. When one is active after you open "Edit Page", the buttons to activate the other two modes will show at the top, so switching from one mode to any other mode is easy. Additionally, there are two tabs at the top of the page when you are editing, Visual and Text. Visual means that the system will try to show you the content as it will be displayed on the website and Text means you can edit the raw HTML code. An example in the instructions that follow might be "Go to Classic Mode/Text," which would refer to clicking on the Classic Mode button, if you are not already in Classic Mode, and clicking on the Text tab, if you are not already there.

**Dashboard:** This is the part of the website that is hidden to the regular visitor, resident or not. It gives you access to the editing of pages, menus, plugins, themes, and much more. You will only be editing pages and, for the most part, only see the Dashboard after you first log in and on each side of the page area you will be editing.

**Control Functions:** We'll refer to a few control functions below in a short-hand as CTRL-A, CTRL-C, CTRL-X, and CTRL-V. This means to hold the control key (bottom, left of keyboard) and hitting the character specified after the dash. For example, CTRL-A means hold the control key down and hit A. Upper and lower keys are immaterial and are just used here for emphasis.

CTRL-A will select all the content of the area, where the cursor is

CTRL-C will copy the selected content into the clip-board

CTRL-X will copy the selected content into the clip-board and delete it from the page

CTRL-V will paste the content of the clip-board into the area, where the cursor is

We'll use "select all" to mean CTRL-A, "copy" to mean CTRL-C, "copy/delete" to mean CTRL-X, and "paste" to mean CTRL-V. Of course, you can also use your left mouse-clicks to perform these functions, if you prefer.

**Symbols in the Backend and the Frontend Modes:** You need to recognize a few symbols when you are editing areas of a page:



Pencil for Edit



Pages for Duplicate



Trash Can for Delete

## Create a New Archive Page

- Log into the website,; you'll see the Dashboard
- Go from the Dashboard to the website
- Click on the "Residents Main" on the main menu
- Click on "Association Documents"
- Go to Classic Mode and Edit Page/Text
- Click anywhere inside to the content of the page to position the cursor there
- Select all, then copy
- Click "Add New" at the top of the page and a new page will be created

- On this new page, go to Classic Mode and Edit Page/Text
- Place the cursor inside the content of the page
- Paste
- Enter the name of the new archive page into the page name right above the editing mode buttons, f. ex. 2016-archive
- Under Page Attributes on the right, change the Template drop-down to "Layout - Fullwidth"
- Hit Update to save and publish the page - wait until it finishes; the page will refresh
- Click View Page at the top to display the new page - verify that it is identical to the original Association Documents page
- Click once in the address bar to highlight/select the URL and copy the link address of the new archive page into the clip-board - you'll be pasting this into a new button on the Association Documents page

### **Add Archive Button to the original Association Document Page**

- Go to Residents Main and Association Documents
- Go to Edit Page, Backend Mode
- Place the mouse in the area of page you need to edit, a green box will appear, click on the "pencil" to edit - this applies to any of the areas you need to modify
- The first area you need to edit is the button that links to the archive page(s) - click on the "pages" to duplicate the button
- Move the mouse over the button you just duplicated (the one on top, not the new one created) and click on the "pencil" to edit
- Change the archive text (i.e. if it was "2015 Archive," make it "2016 Archive")
- Replace the HREF field with the link you copied above by pasting it in
- Click Save Changes; this just updates this particular area
- Remove (delete) empty rows at the bottom, if there are any
- Click the Update button on the right to save your page changes and publish the page

### **Modify the New Archive Page**

- Click on View Page at the top - you should see your new button on the page
- Click the new archive button to go to the new archive page
- Click Edit Page at the top and go to Backend Mode
- Move the mouse over the first section, editing to remove items that'll stay on the Association Documents page (i.e. the current items)
- Save Changes and repeat for each section

- When all are done, click Update to save your page changes and publish the page

### **Modify the Association Documents Page**

- Go to the Association Documents page and click Edit Page
- Repeat the process above, except this time remove items that you didn't remove from the new archive page (i.e. the current files)
- Click on Update to save your changes and publish the page

You might choose to leave some items on both the Association Documents page and the Archive page, such as documents that stay the same for year to year or even some items that technically should only be on one and not the other in order to not leave a section empty. This way you'll always have a document you can duplicate and modify, when you post new items.

You might question why the order above calls for adding button on current page, modifying archive page, and then going back to the current page. This is not really significant, but this approach lets you keep your original page in its original state, except for the new button, until you have finished the archive page and verified that all looks good.