VolunteerMatters Wordpress Web Platform Calendar Admin Guide

Version 1.1

VolunteerMatters Wordpress Web: Admin Guide

This VolunteerMatters Wordpress Web Platform administrative guide is broken up into four main areas:

 I. Website (Pages, Posts, Files, etc)
 II. eStore (in coming document)
 III. Calendar
 IV. Volunteer Portal (subscription based - in coming document)

Administrative accounts for the VolunteerMatters Wordpress Web Platform are defined within your VolunteerMatters contact database (https://www.volunteermatters.net/vm) in a built-in custom field called "Website Roles". There are 5 different types of administrative accounts built in to administer to the VolunteerMatters Wordpress Web Platform that you can assign to contacts in the VolunteerMatters database:

- site_administrator
- site_calendar_manager
- site_content_manager
- site_shopping_manager
- site_document_manager

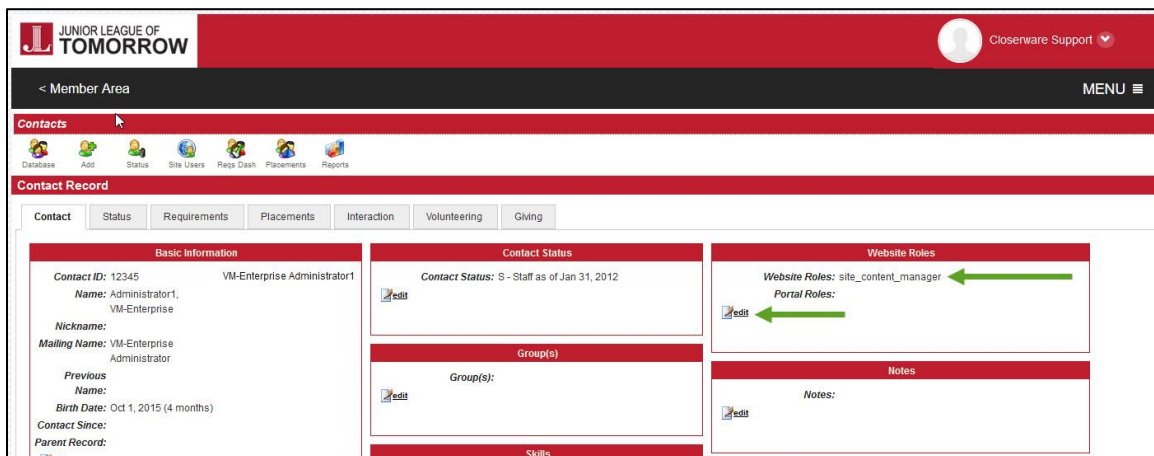The built-in roles are specifically for the administration of the following areas of the VolunteerMatters' Wordpress Web Platform:

1. **site_administrator** - Full site administrative access.

2. **site_calendar_manager** - Can administer the calendar. This includes creating/editing/deleting events as well as event permissions.

3. **site_content_manager** - Can edit any existing page content (including available homepage elements) as well as add/edit/delete any dynamic custom port types.

4. **site_shopping_manager** - Can administer the online store. This includes creating/editing/deleting product categories, items, coupons, etc. as well as item permissions and managing orders.

5. **site_document_manager** - Has control of the Document Management section in the backend.

To assign these roles to a member you will log into your VolunteerMatters administrative system (https://www.volunteermatters.net/vm) and select the "Admin"

link from the dropdown and then click on the "Database" icon ( ) to get to your contact database list (https://www.volunteermatters.net/vm/member/ContactList.do) and then navigate to the contact record you wish to add a role to and click on the "View

Record Detail" icon ( ). Then you will click the "Edit" button/link ( ) to edit the "Website Roles" custom field.

There you can select the "role" that the contact is supposed to have within your VolunteerMatters Wordpress Web Platform and the next time they log into the Website they will have those administrative abilities.

Calendar

Events

The Calendar portlet is powered by The Events Calendar Pro plugin (https://theeventscalendar.com).   From your main calendar you can view events by month (default), list, and week. The month view is set by default but if you would like this can also be configured to default to the list or week views.

Here are some of the features of the Events Calendar:

MULTIPLE VIEWS
Show off your events in a calendar grid, list, week, or day. The month view is set by default but if you would like this can also be configured to default to the list, week, or day views. Views are searchable and show event Featured Images.

FULLY RESPONSIVE
Visitors can find and view events from their desktop, laptop, tablet, or smartphone. Each calendar view is fully responsive and mobile-ready so your users can find events from anywhere.

SAVED CONTENT
Frequently have events at the same venue? No problem! Venue and organizer information is saved so it can be easily used for new events. Of course, you can always edit the details from the admin menu.

CATEGORIES & TAGS
Organize and label events by using Event Categories and post tags. Taxonomies display in event details and users can view Event Category or tag archive pages on the frontend.

IMPORT/EXPORT
Import events, venues, and organizers into your calendar with our CSV Importer. Users can export individual events or a full view's worth for use in iCal or Google Calendar.

Adding Events

To add a new event to your website, you will need to login to the website with appropriate credentials.   The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.

There are multiple methods for adding a new event but all lead to the same page.
Click on the "Events" link in the Admin Bar and select "Add Event" from the drop-down. This will take you to event editor.
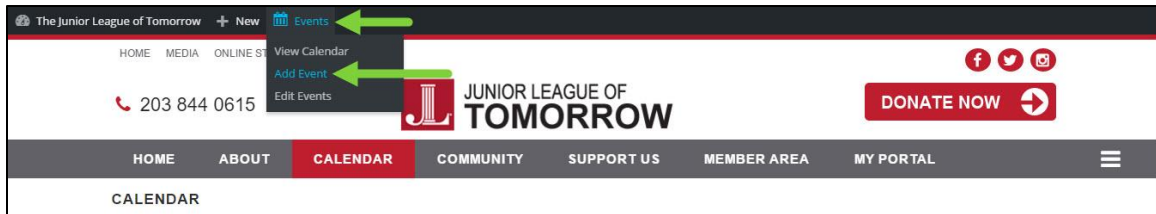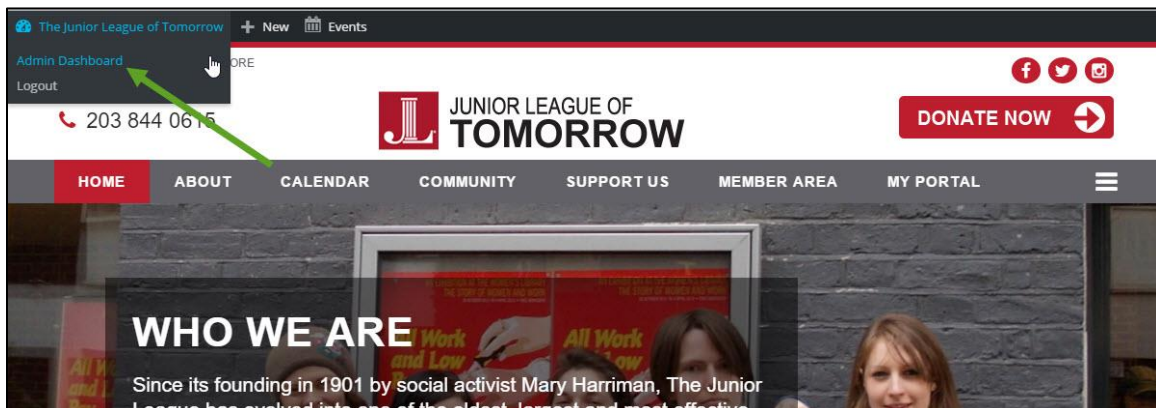

or

Click on the "New" link in the Admin Bar and select "Event" from the drop down. This will take you to event editor.
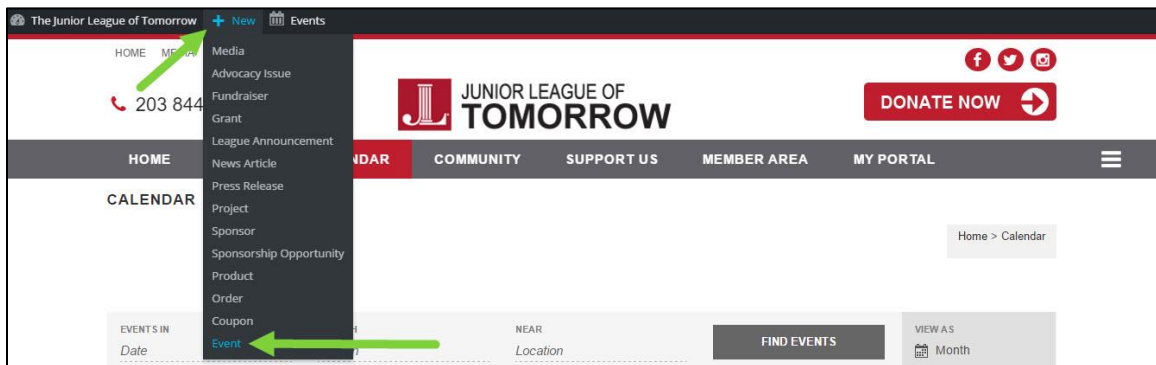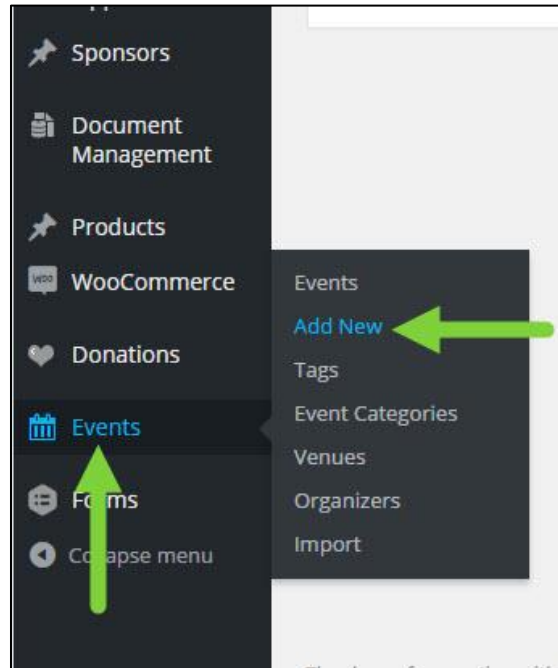

or

Click on the "Admin Dashboard" link to enter the administrative area of the website.
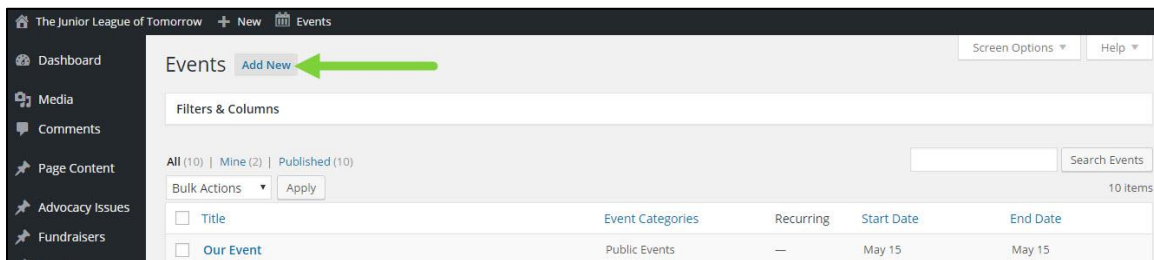
Then click on the "Events" menu entry and then click "Add New". The "Add New" will also appear when you hover the cursor over the "Events" menu entry in the left hand side menu.

or

When you are on the listing of events or editing an event there will be an "Add New" button.

Once you have used one of those methods to create a "New" event, you will be taken to event editor page. Different from most the Screen Options to remove unnecessary elements only includes a "Number of items per page" configuration. Filters and Columns are handled via the meta box above events called "Filters & Columns". It can be expanded and minimized by clicking on the header in the box. We will cover this functionality further down in this document.

Here is a screenshot of the blank event editor page.

Depending on what you have removed via the Screen Options, the typical elements needed for Custom Post Type are the following:

1. **Event Title**
   The title of your event. You can use any phrases, words or characters. Note: using the same title twice (either manually or copying) will result in a sequential number being added to the slug/permalink. You can use commas, apostrophes, quotes, hypens/dashes and other typical symbols in the event title like "My Site - Here's Lookin' at You, Kid". WordPress will then clean it up to generate a user-friendly and URL-valid name of the event (also called the "post slug") to compose the permalink for the event.

2. **Permalink**
   Permalink stands for "permanent link". That means an event URL that contains a user-friendly event name derived from the event title which could change, although not recommended, but in a more controllable way. This event name (also referred to as "event slug" or just "slug") can be edited. The permalink is automatically generated based on the title you set to the event and is shown below the title field. Punctuation such as commas, quotes, apostrophes, and invalid URL characters are removed and spaces are substituted with dashes to separate each word. If your title is "My Site - Here's Lookin' at You, Kid", it will be cleaned up to create the slug "my-site-heres-lookin-at-you-kid". You can manually change this, maybe shortening it to "my-site-lookin-at-you-kid".
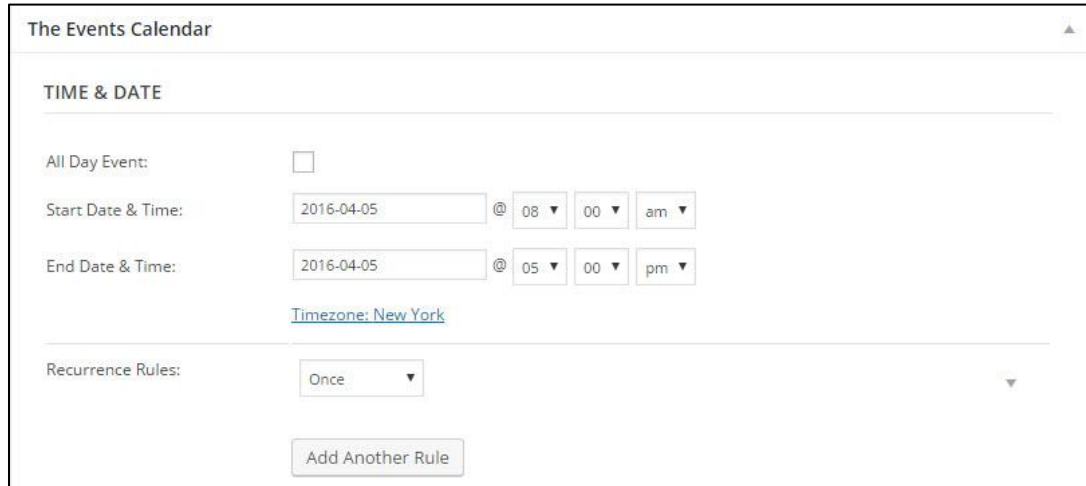
3. **Body Copy Box**
   The blank box where you enter your writing, links, links to images, and any information you want to display on your event. When writing your event, you have the option of using the Visual or Text mode of the editor. The visual mode lets you see your event as is, while the Text mode shows you the code and replaces the WYSIWYG editor buttons with quicktags buttons.

4. **Events Meta Box**
   Events have specific bits of information associated with them that most pages and posts don't require - start and end dates, for instance, not to mention venues and organizers.

   Fields to set all of these things can be found below the description editor, in an area called the events meta box:

Let's look at each of the settings in this area in turn. First, the date and time fields.

- The **All Day Event** checkbox is useful when the event is taking place on a particular date (or dates) - but you don't really know when, or else feel that it is good enough to say it takes place "all day" without being more specific.

- The **Start Date & Time** is fairly self-explanatory - this is simply when the event starts. If you already checked the All Day Event box you will not be able to specify a time - otherwise, of course, you can also pick a time at which the event will start

- Generally what starts must finish, but that isn't always the case. Use the **End Date & Time fields** if there is a defined end time for the event - if there isn't you can leave the end date and time identical to the start date and time: doing so effectively indicates an open-ended event

- **Recurrence Rules** allow you to set guidelines for how, when, and for how long an event with reoccur. To add a rule, first choose a setting from the dropdown. If you leave the dropdown set at Once the event will not recur. For recurring events, you have the following options:

  - Date
  - Every day
  - Every week
  - Every month
  - Every year
  - Custom

For more detailed instructions on recurring event options see the following The Events Calendar support page.

Next, let's move on to the Event Location Details:

The first thing you'll see in this section is the Use **New Venue** dropdown. This allows you to select a venue that you created for some previous event … of course, if this is the first time you have used The Events Calendar it is likely to be empty - but it can save you some time when creating events in the future by re-using existing venue details.

It's also worth noting that you don't need to create (or use) a venue. If you prefer not to specify a venue, simply move on to the next section.

Most of the fields are pretty self-explanatory - you provide a venue name, optional address details and - if you like - a contact phone number and website. The last two checkboxes control whether a map should be shown to visitors and/or a link to a map should be displayed.

If your event is happening a little off the beaten path and there isn't a mappable address, you can use latitude and longitude instead. To do this, leave the venue without an address. After you've created the event, go to Events –> Venues and edit the Venue in question. You'll see an option there for adding coordinates.

Once you're happy with the event's venue you can move on to the next section: the organizer details.

Rather like the venue details, you can select any pre-existing organizer details that you have already entered. Also - just as with the venue details - this area is completely optional.

You do not need to provide organizer details and, if you do, you need only provide as much information as you want to. With The Events Calendar you can add multiple organizers to an event. Keep in mind that if you opt for multiple organizers, any organizer meta (like the phone number or email) will not show on the frontend- only the organizer names will be listed and will link to the associated Organizer Page.

The next section in the New Event Admin lets you (again, optionally) provide an event website:

This is particularly useful if you are showcasing events organized by external organizations and they have a dedicated event website.

Next, let's look at the event cost fields:

Once again you can pass on by and leave these alone if you like. If you don't provide a cost, then no cost details will be shown to visitors. If the event is actually free then simply provide a cost of 0 (zero).

This "Cost" is purely informational and DOES NOT connect to the eStore or allow the visitor to add to a cart from this page.

5. **Excerpt**
A summary or brief teaser of your event featured on the one of your calendar views, either on the homepage, calendar page, or custom location. If you do not enter a manual excerpt the system will automatically use as the excerpt the first 55 words of your event body. If you use the manual "Excerpt" field when editing the event, this will be used no matter what.

Discussion (NOT PICTURED)
Options to enable interactivity and notification of your event. This section hosts two check boxes: Allow Comments* on this event and Allow trackbacks and pingbacks on this event. If Allowing Comments is unchecked, no one can post comments to this particular event. If Allowing Trackback and Pingbacks is unchecked, no one can post pingbacks or trackbacks to this particular post. If Allow Comments is checked, it is required to be logged in to submit comments.

*Some event pages have comments removed all together on their display page so it does not matter what setting is checked here.

6. **Wordpress Access Control**
This element determines if the event is Member only or Public. If it is a member only element, you will check "Only accessible by members?" otherwise by default it is a publicly available post.

This should be used in conjunction with the Member Only event category.

7. **Publish box**
There are 3 main elements in this box: Status, Visibility, and Published.

Status can be "Published", "Pending Review", or "Draft". For events, this should remain as "Published" if you want it live on the website or Pending Review or Draft to make it only available on the Admin Dashboard.

Visibility - This determines how your event appears to the world. Public events will be visible by all website visitors once published. Password Protected events are published to all, but visitors must know the password to view the event content. Private events are visible only to you (and to other editors or admins within your site)   FOR THE MOST PART YOU WILL ALWAYS LEAVE AS PUBLIC AND MEMBER ONLY EVENTS WILL BE DESIGNATED BY WORDPRESS ACCESS CONTROL BOX AND THE MEMBER ONLY CATEGORY.

Published will show the date/time the event was created.

For the most part you will only click the "Publish/Update" button in this box to either publish your event the first time or to update your event. I would recommend the "Preview Changes" button before clicking the "Publish/Update" button.
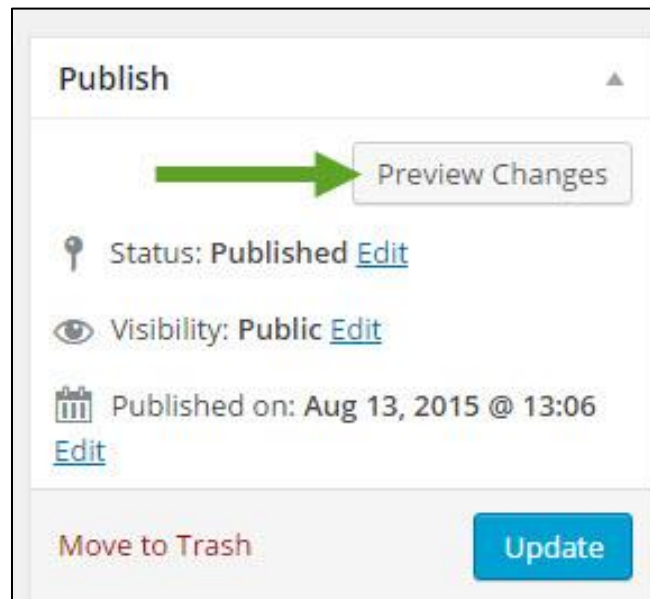
This opens up a new browser window of the event to allow you to review the new event or any changes to an existing event before committing them.

8. **Event Tags**

These can be used with events as micro-categories. Event with similar tags are linked together when a user clicks one of the tags. Add new tags to the event by typing the tag into the box and clicking "Add". You can also choose from the most used tags or when typing the tag name in the box, if one exists that matches it will be displayed so you can click on it.


9. **Event Categories**

   The general topic the post can be classified in. We start with two default categories: Public Events and Member Only. We recommend configuring your events with the proper category as this allows you to filter within the admin by the event category and display category specific calendar pages. You can add additional event categories as needed from the Event Categories section under Events in the Wordpress Dashboard.

10. **Event Options**

    Usually found close to the tag and event category meta boxes, you can find the Event Options:
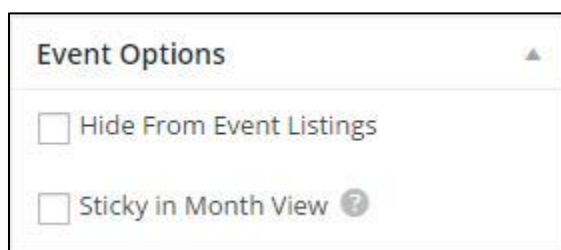

    Sometimes you want to be able to link to an event (by email, or directly via a menu) but would prefer it isn't included in the main event views - checking the **Hide from Event Listings** box accomplishes just that.

    You might also happen to have a whole load of events taking place on the same day … naturally that can cause some problems in month view - and so, at least by default, no more than 3 events per day are shown in that view - selecting **Sticky**
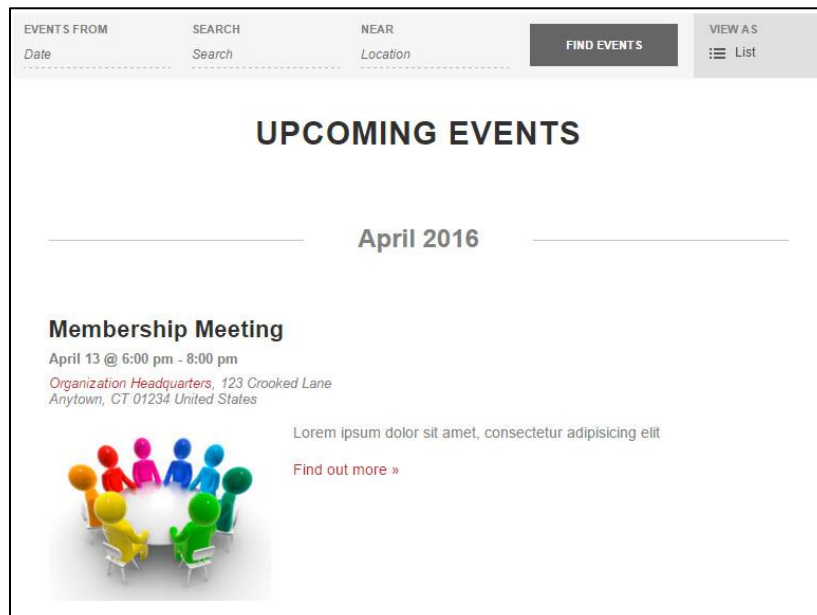
in Month View helps you to ensure that this event is one of the ones that do show

11. **Featured Image**
   This is the image that is chosen as the representative image for your event. When in the calendar view, a thumb-nailed version of the feature image will be displayed when you hover over an event.
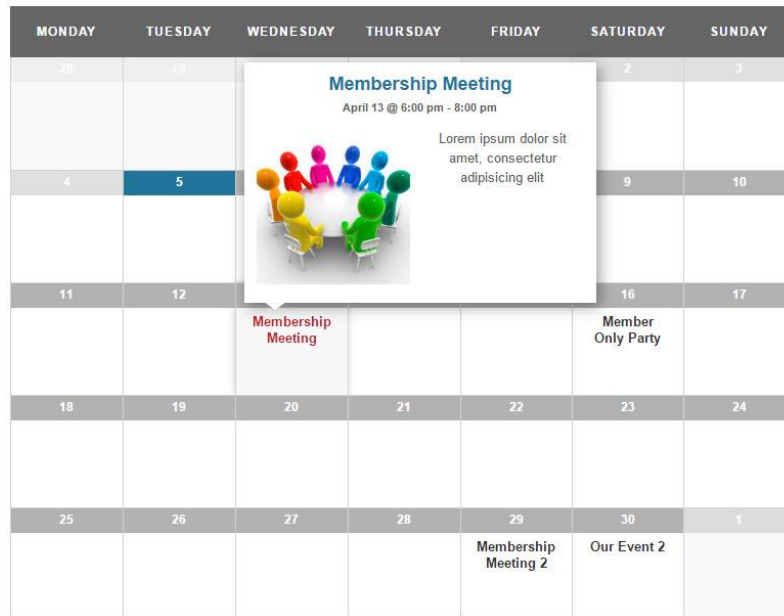
As well as in the events list.

The featured image is then displayed on the event page above the body content.
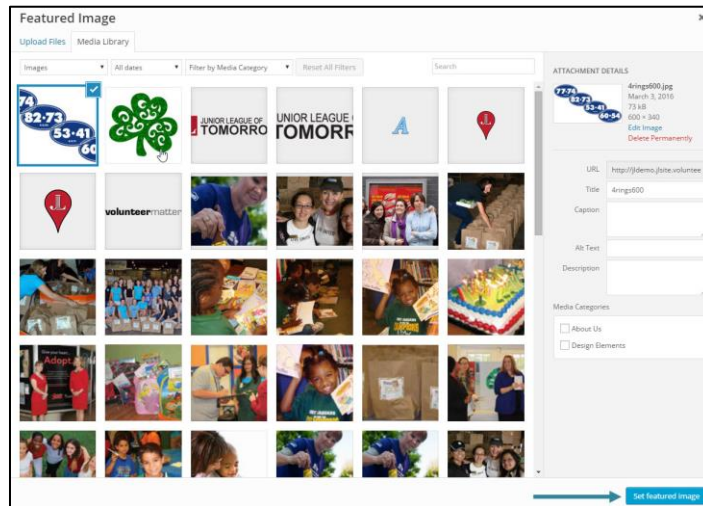

To set a Featured Image click "Set Featured Image".
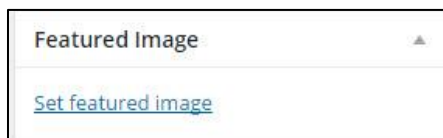
You will see an uploading screen identical to that used when inserting an image into a post or page content. Follow the on-screen prompts to choose the image from your computer and upload it or choose it from one of the images already in your Media Library.

Once the image has successfully been uploaded, you'll see one or more images displayed as thumbnails. Click on the one you want to use as a featured image. It will then appear outlined in blue with a checkmark. If desired, you can add a caption and alt text under the Attachment Details area (optional).

Next, click the button Set Featured Image at the bottom right.

To remove or change a featured image, simply re-open the event and click "Remove featured image" in the Featured Image box.
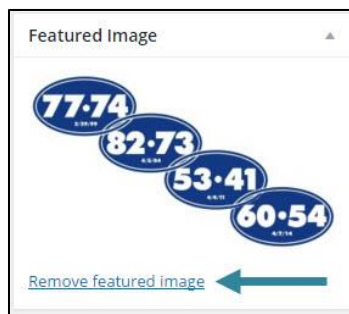

Once you finished configuring your new event you will then click the "Publish" button and it will be added to the calendar and the event itself will be available by URL.

For more information on Adding Images and File Downloads to your Event's body click here.

Editing Events

The initial event display order is by event start date (descending). You can change that when you are on the page to sort by "Title", Categories, Date, etc.. Basically most any column you add to the display via the "Filters & Columns" meta box. You can also create filters based on Event criteria and create saved filters based on the same criteria the "Filters & Columns" meta box For more information on the "Filters & Columns" meta box see the section below.

You can also search for keywords in your events.   For example, if your website has a lot of events and you are looking for the "gala" event, you could enter gala in the Search field and click "Search Events" or "Enter" on your keyboard.
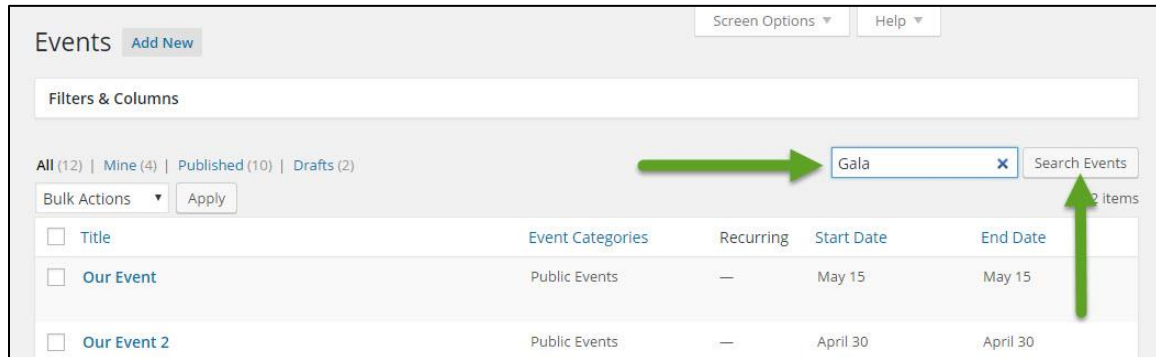
This will return all events that feature that keyword whether in the title or content.

Once you locate the event you wish to edit, you can hover your cursor over the element and additional elements will be displayed for each event:

Edit | Quick Edit | Trash | View | Duplicate Event

Edit - This Action can be either an "Immediate Action" or a "Bulk Action". The Immediate Action, initiated by click on the Event Title or clicking on the Edit option just below the Event Title, causes the Edit Event screen to display. Edit is also available as a Bulk Action for the selected events (see following selection for Bulk Actions)

Quick Edit - Quick Edit is an Immediate Action performed on one Event by clicking the Quick Edit link, under the Event Title in the Table of Events. Quick Edit is just an in-line edit that allows you to change the following items--Title, Slug, Date, Author, Password or Private post box, Event Categories, Tags, Allow Comments, and Status, etc..

Trash - This Action deletes the Event. Delete is available both as a Bulk Action, and an Immediate Action. Note: You cannot delete locked events. This will only place the event in the trash section of the Table of Events. From there you can either restore it or delete permanently.

View - This Action presents the Event as it appears on your website. View is available only as an Immediate Action.

Duplicate Event - This action will create an exact duplicate of whatever event you select it on.

When on the Edit Event screen, once you make your necessary changes to the event, you will click the "Update" button and your changes will be committed and display on the event in question and the website calendar.

Bulk Edit Options for Events
The Bulk Edit Events 'screen' is displayed below the Table Of Events header once, one, or more Events, have been selected, and the Bulk Action of Edit is Applied. Bulk Edit allows the fields, Author, Comments, and Status to be changed for all the selected Events.

It is important to note, Categories and Tags can be ADDED in bulk to a set of Events but it is not possible to CHANGE, or DELETE, a Category, or Tag, for those Events.

- **Cancel** - Click Cancel to cancel and abort the Bulk Edit of these Events.
- **Update** - Click Update to save the Bulk Edits made to these Events.

Deleting Events

If you wish to delete an existing event, you can do so in a few different ways:

- **Immediate Action from the Table of Events list** - hover over the event and click on Trash

- **Bulk Delete from the Table of Events list -** once, one, or more Events, have been selected, and the Bulk Action of "Move to Trash" is applied those events will immediately be sent to the event trash section.
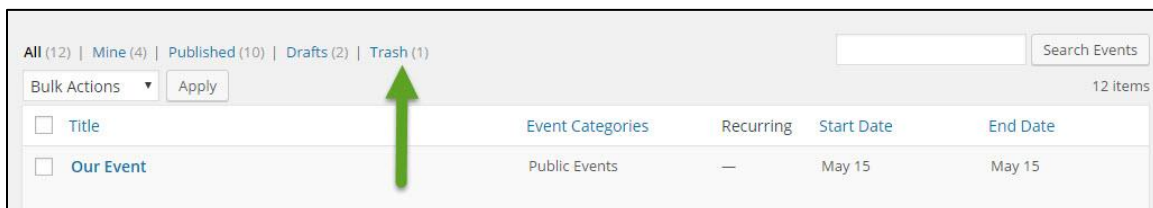

- **Publish meta box "Move to Trash" link** - when editing an event clicking on the "Move to Trash" link in the "Publish" meta box will immediately send the event to the event trash section.
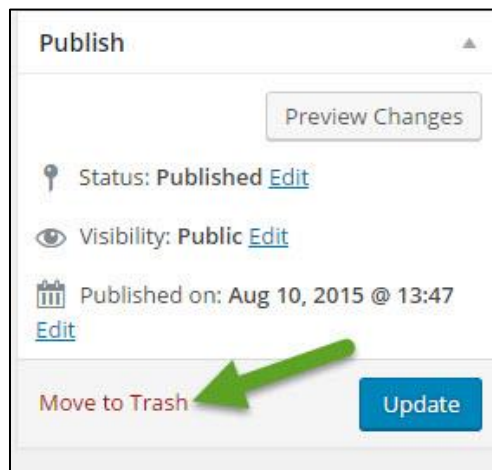
Events Trash Section

In the Table of Events, if there are trashed events, they will show as a link (with number of events trashed) that you can click on.
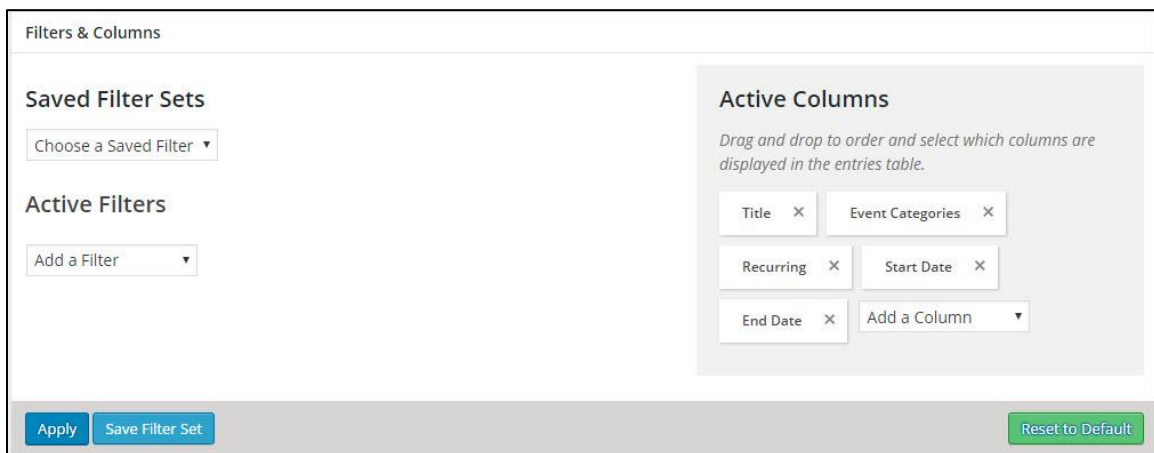

From there you can either restore an event(s) or delete permanently.

Filters & Columns Meta Box

When you are in your Table of Events from the admin dashboard, right above that list, you should see a meta box called **Filters & Columns**. That might be collapsed for you:

So go ahead and expand it to see the full capabilities by clicking on the header (where it says "Filters & Columns):


Sort events by column
The Filters & Columns meta box gives you a slew of options you can use to sort events. You can arrange events in ascending or descending order for any of the available columns in the list. Right off the bat, the default available columns for Events include:

- Title
- Event Categories
- Recurring
- Start Date
- End Date

Don't like those options? Remove them from Active Filters area in the Filters & Columns box above the list. Similarly, any of those options can be added as columns by selecting them from the "Add a Column" menu. Additional columns available:
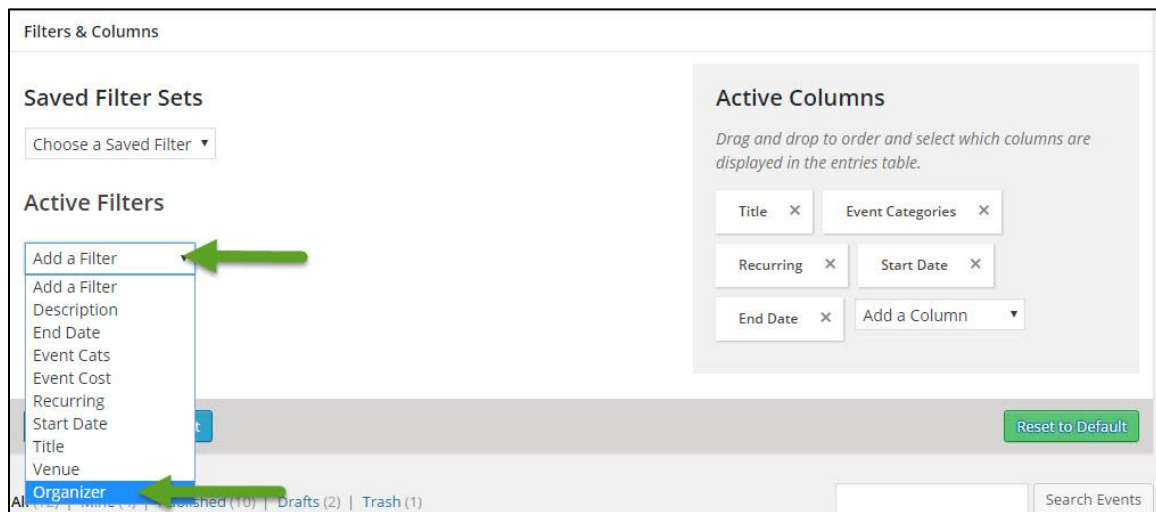
- Organizer
- Venue
- Event Cost

- Author
- Tags
- Comments
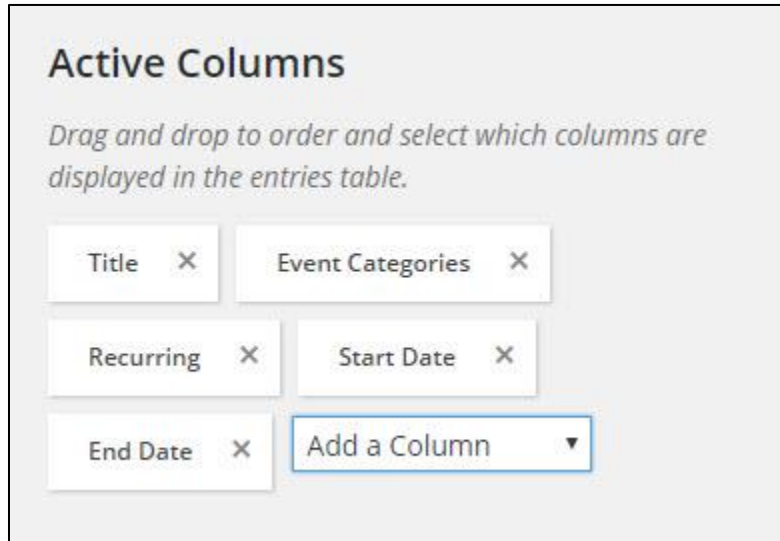
Creating saved filters

The Filters & Columns meta box also allows you to created saved custom filters based on any combination of available filters. For example, you could create a reusable filter that only displays events organized by a specific organizer. To do so in the "Active Filters" dropdown select a criteria, in this case "Organizer".

Once you select it will appear above the dropdown and you can place your cursor in the box and you will automatically be presented with a list of organizers for your calendar and you just need to select the one you want.
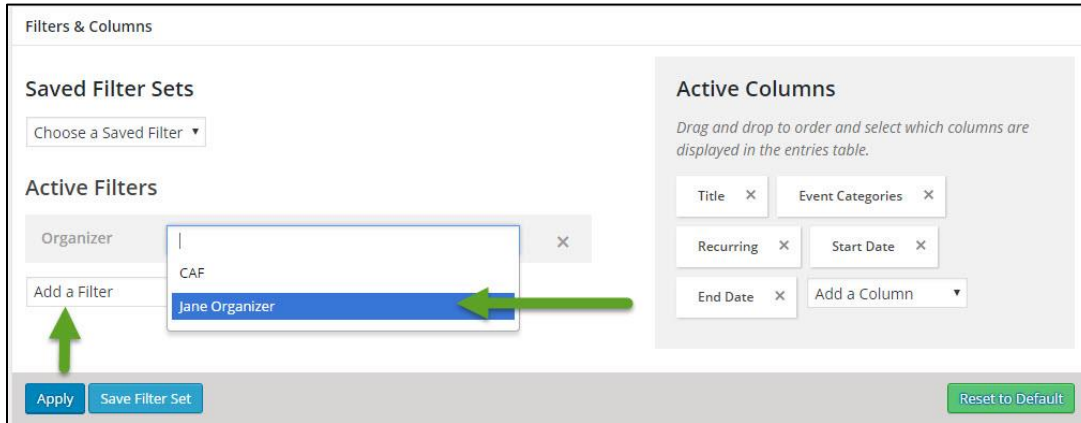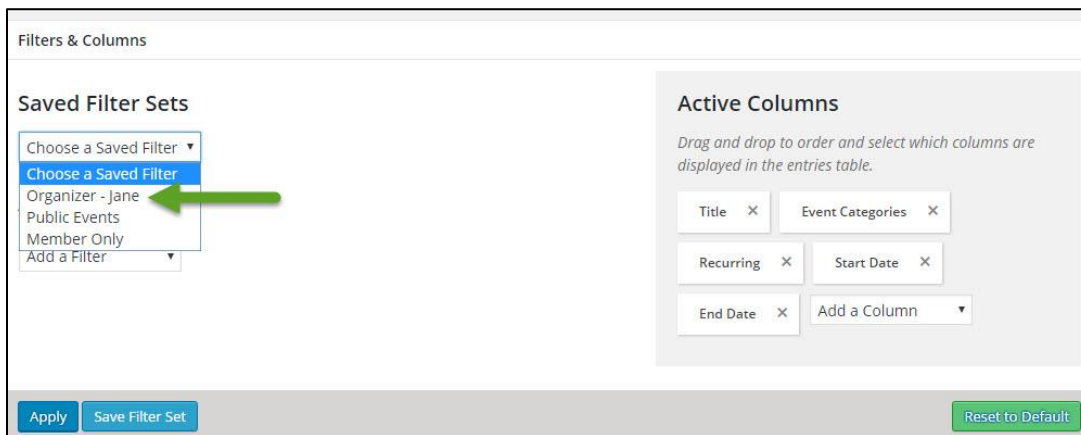
Then click "Save Filter Set":

This will open a space for you to enter the "Filter Name" and click Save or Cancel.

Once saved, the filter will now appear in the "Saved Filter Sets" dropdown for future use.

To delete a "Saved Filter Set" just select it and the when loaded click "Delete Filter" under the "Saved Filter Sets" dropdown.

NOTE: The saved filters do not retain their own columns. Columns are set globally for the user and they will change for a Saved Filter if you change for one.

To collapse the "Filters & Columns" meta box just click in the header once again.