



ECOLOGICAL SOCIETY OF AMERICA

ESA CHAPTER AND SECTION
GUIDELINES AND WEBSITE
MANUAL

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PART A

For information on budgets or any other financial matter contact Liz Biggs (liz@esa.org)

For questions on any aspect of the Annual Meeting contact Christi R. Nam (christi@esa.org)

To obtain a current list of section or chapter members contact Thet Oo (thet@esa.org)

For website questions contact Gordon Potter (gordon@esa.org)

For membership and certifications questions contact Tanya Pendleton (tanya@esa.org)

For registration and exhibit questions contact Faye Pastor (faye@esa.org)

For questions on Long Range Planning Grants or any other questions about the society contact Katherine McCarter (ksm@esa.org)

SECTION BUDGET INFORMATION

- ESA maintains detailed records of each chapter and section budget. All of the chapter/section dues are included as income and any expenses on behalf of the chapter/section are listed as expense. The balance will carry forward if it is not completely spent in any year. Because dues are received throughout the year, please request an updated budget whenever needed.
- Please contact ESA's CFO Elizabeth Biggs at any time if you would like the status of the amount of money in your chapter/section budget.
- If a chapter or section receives a Long Range Planning Grant those funds are tracked separately and do not carry over at the end of the fiscal year. If you would like a status of how much has been spent on a long range planning grant, please contact ESA's CFO Elizabeth Biggs

HOW TO REQUEST PAYMENTS BE MADE OUT OF THE CHAPTER/SECTION BUDGET:

- When requesting a payment be made out of a chapter/section budget please fill out the Chapter/Section Check request form. The form must be signed by the Chair of the chapter or section and then sent to Elizabeth Biggs in the financial office at ESA. If the payment is for a purchase of goods or services (such as a plaque or banner or book) please attach a copy of the receipt.
- If the payment is to an individual and is over \$600 we will need the social security of the individual.

Financial Forms: Please see attached Chapter/Section check request:

http://www.esa.org/esa/?post_type=document&p=9081

HOW FUNDS MAY BE USED

Chapter and Section funds may be spent on any activity related to the activities of the chapter/section if approved by the chair of the chapter/section. They may not be used to reimburse chapter/section leadership for any travel or time spent on chapter/section activities.

LONG RANGE PLANNING GRANTS

The ESA yearly budget frequently contains funds for long range planning grants. Sections, Chapters and Standing Committees are eligible to apply for these funds which are to be used for projects that move the Society towards long range planning goals. Only one application from a Section, Chapter or Standing Committee is permitted.

The announcement for the grant proposals is issued in the fall and sent directly to Section, Chapter and Committee Chairs and includes the application form and the criteria for the awards. Proposals are generally due in late fall. Proposals are evaluated by a subcommittee of the Governing Board and those awarded grants are notified in the winter. Reports on the progress of the activities supported by these grants are due in August at the time of the ESA annual meeting.

To request payment for activities related to long range planning grants, follow the guidelines in the Financial section of this document.

ELECTIONS AND LEADERSHIP UPDATES

Each section holds their own election according to their own bylaws. ESA will provide a list of members. (See Communicating with your Members)

Each section has its own bylaws. Section Chairs are responsible for providing a copy of the bylaws to ESA. Please send them to esahq@esa.org.

Each section is to provide updated leadership list immediately after its elections. ESA will request this information after the Annual Meeting.

EVENTS

If a chapter or section chooses to hold a meeting or other event at a time other than during the ESA Annual meeting, please contact Christi Nam in the business office at Christi@esa.org. Staff at HQ will need to know the particulars of the meeting or event being held. Because of liability issues, additional insurance may be required which would need to be paid for out of the chapter or section budget. In addition there may be other issues that need to be addressed by ESA staff.

COUNCIL REPORTS / ANNUAL REPORT

Each year ESA requests a brief annual report from the committee, section and chapter chairs which are distributed during the annual meeting and published in the Bulletin after the meeting. The deadline for these reports is mid-July. You will be given detailed instructions on where to send the reports and the exact deadline date in the spring before the Annual Meeting. Section and Chapter chairs are members of the ESA Council which meets every year during the annual meeting from 2-5PM on the first Sunday of the meeting. Notices about the location of the meeting are sent in advance of the meeting. Chairs who cannot attend the meeting are welcome to name a substitute by notifying the Executive Director.

ANNUAL MEETING

BUSINESS MEETING AND MIXERS

It is the responsibility of Chairs to organize and reserve space for a mixer and or a business meeting to be held at the annual meeting. You will receive an email form from the meetings department early in the year with a deadline for submitting your meeting/mixer. You will be informed of the money you currently have in your section budget. This money is to be used to pay for any food or drink provided at the mixer or business meeting.

Business meetings can be held Monday through Thursday mornings from 7 am to 8 am or 9 am; lunch time slots run from 11:30 am to 1:15 pm; and evening slots run from 6:30 pm to 8 pm. Evening slots are usually used for mixers, and often a section will combine a mixer and a business meeting in the evening.

EXHIBIT BOOTH

Sections and Chapters are offered the opportunity to have a booth in the exhibit hall free of charge. The Chair is responsible for deciding whether or not to have a booth. The booth needs to be staffed during show hours of 11:00 am to 1:30 pm and 3:00 pm to 6:30 pm, Monday through Thursday. Setup time for the booth is either Sunday from 10 am to 5 pm or Monday 7 am to 9:30 am. Tear down time for the booth is Thursday 6:30 pm and must be complete by 9:30pm. Section members are responsible to pack up their booth, anything left in the booth after 9:30pm will be discarded.

PROMOTION

Sections and Chapters can help us promote our annual meeting and encourage members to attend the annual meeting through newsletters or emails to your membership.

SECTION AWARDS

Sections offer awards that tie in with the annual meeting and often are based on oral or poster presentations. The Membership Manager will notify each of the Section Chairs early in the year to remind them to provide ESA with their awards information. This information will be posted on the ESA website under the Awards tab. This information is very important to annual meeting attendees, since award money is often the only way one can afford to attend the annual meeting.

PROPOSAL REVIEW

ESA's Program Committee relies on ESA's leadership for help assessing proposals for Symposia, Organized Oral, and Organized Poster Sessions for each year's Annual Meeting. Appropriate broad-based peer review of these proposed sessions is critical in order to maintain the high level of quality expected of these sessions at ESA meetings. Reviewers include the Annual Meeting Program Chairs, Section and Chapter Chairs, and members of certain Standing Committees. Each proposal will receive the attention of several reviewers. The input of Section and Chapter chairs as reviewers is extremely helpful as the committee decides which sessions will be accepted for the meeting program. Proposal review is one of the primary ways that sections can assist in developing the meeting program and represent the interests of the membership.

ESA will send out a request for reviewers around the submission deadline. Reviewers typically are asked to review 10-12 proposals over 3 weeks in October. Each proposal is short and does not take very long to read. Please note that chairs are still eligible to be a reviewer even if they have submitted or endorsed a proposal. ESA will avoid assigning to you any proposals in which you are formally involved, and you will be able to opt out of reviewing any proposals that present a conflict of interest.

CHAPTER SECTION WEBSITES

Many of the ESA chapters/sections have websites; some are hosted at esa.org, while some are hosted externally.

ESA webmaster updates those websites, which are hosted at esa.org and don't yet use a content management system (CMS). Those chapter/section websites, which use a CMS, typically update their own content. ESA uses WordPress as the CMS of choice for all new websites hosted at esa.org.

All other web related inquires can be sent to the ESA webmaster, webmaster@esa.org.

COMMUNICATION WITH YOUR MEMBERS

Mailing/email list of the chapter/section members can be requested from Thet Oo, ESA IT Manager. Alternatively, you can also send your text to Thet Oo and he will send it for you to your members. Please allow 3 to 5 business days to process your request. Because members join and renew throughout the year, please request an updated list whenever needed.

All units of ESA (such as sections and chapters) are viewed as part of ESA, therefore it is important that any lobbying activities or social media communications on public policy be coordinated with ESAs Public Affairs Office.

SOCIAL MEDIA

Annual Meeting Social Media Guidelines

ESA encourages open discussion on social/new media outlets at our Annual Meeting. In order to find a balance between the needs and expectations of members and make the meeting a safe and comfortable space for everyone, we set forth the following guidelines:

- Please keep in mind ESA's meeting [Code of Conduct](http://esa.org/ftlauderdale/esa-meetings-code-of-conduct/) (<http://esa.org/ftlauderdale/esa-meetings-code-of-conduct/>) and apply it to your communication online (and in person!). Harassment, intimidation, or discrimination in any form will not be tolerated.
- We ask that you do not photograph, video, or audio record information during scientific sessions (talks and posters). Special arrangements to photograph or record sessions, WITH EXPLICIT PERMISSION FROM PRESENTERS and ESA, can be made through the meetings director, [Christi Nam](mailto:christi@esa.org) (christi@esa.org), but must be pursued well in advance of the event! [PHOTOGRAPHY AT SOCIAL EVENTS, IN PUBLIC AREAS, AND AT PLENARY SESSIONS IS OKAY.]
- There are options for sharing presentation materials without in-session photography: presenters may post slides and posters to the [ESA's F1000 Research Channel](http://f1000research.com/channels/ESA) (<http://f1000research.com/channels/ESA>), Figshare, Github, and other online databases at any time.
- Social/new media (Twitter, Facebook and others) "opt-out" policy: While the **default assumption is to allow open discussion** of ESA presentations on social/new media, please respect any request by a presenter to not disseminate the contents of their talk. The following icon may be downloaded from the ESA website for inclusion on slides or posters to clearly express when a presenter does not want their results posted to Twitter or any other new media sites:

You may download opt-out Twitter image at <http://esa.org/ftlauderdale/social-media/>. (PLEASE INCLUDE THE OPT-OUT TWITTER IMAGE ON EVERY SLIDE TO ENSURE YOUR PREFERENCE IS KNOWN SINCE PEOPLE MAY COME IN AFTER YOUR PRESENTATION BEGINS.) Thank you in advance to everyone for following these basic guidelines for online posts of all kinds and helping us maintain a welcoming environment for sharing information. As a reminder, the official meeting hashtag is #ESA2016. We look forward to seeing your thoughts and discussion online

ESA sections and chapters are encouraged to make use of ESA's social media, which includes Twitter, a blog, Facebook, Google+, Instagram, LinkedIn, and more. Sections and chapters might consider tweeting about news and opportunities. Several have created Facebook pages, which ESA also features on its FB page and section and chapter chairs or other members might also consider submitting a guest post to ESAs blog. Please note that communications related to policy should first be discussed with ESA.

Blog

ESAs blog *EcoTone* showcases ecology and ecologists, focusing on ecological science in the news and its use in policy and education. *EcoTone* welcomes guest submissions on topics of interest to the broad ecological community. Please see: <http://www.esa.org/esablog/>

Twitter

ESA uses Twitter daily to tweet items of interest to the ecological community, including news articles, members who have received a prestigious award or to announce deadlines to submit abstracts to the annual meeting. Sections might tweet about news relevant to their community or special opportunities and awards offered by their section.

Sections can use ESAs twitter handle: @esa_org. The official 2016 Annual Meeting hashtag is #ESA2016. ESAs Twitter page is https://twitter.com/#!/ESA_org Please refer to the Social Media Guidelines at <http://esa.org/ftlauderdale/social-media/>

Please note: During the Annual Meeting, recording or taking photography of another individual's presentation without the explicit permission of ESA is not allowed.

Facebook

Facebook (FB) is another outlet for sharing ecological and ESA-related information and encouraging conversation among ESA members and others. Sections and chapters that create their own FB page should notify ESA so that the Society can “like” them on FB and ensure they are featured on the Society’s FB. Sections and chapters are also encouraged to “like” ESA on their respective FB page. Please go to: <http://www.facebook.com/esa.org>

LinkedIn

ESA maintains a LinkedIn profile page that is the world’s largest professionals networking sight used to build a professional identity and access new opportunities. Sections are encouraged to build a unique section page and connect with the ESA main page.

ESAs LinkedIn page can be accessed by this link:

https://www.linkedin.com/groups?home=&trk=anet_ug_hm&gid=1233137

Google+

ESA maintains a Google+ page. Sections and chapters are encouraged to develop their own Google+ page and connect with the main ESA Google+ page.

ESAs Google+ page can be accessed by this link:

<https://plus.google.com/111172871196171730512/posts>

POLICY

Sections and chapters may be interested in becoming involved in policy issues or activities. They should inform the Society about their plans so that ESA is aware of activities that count as lobbying (for IRS purposes) and also to ensure that activities are consistent with the Society’s perspective on a given issue. ESA occasionally encourages its members (often by state or section) to weigh in on a public policy issue. More details about ESA advocacy and policy positions are below. Please contact pao@esa.org with questions or suggestions.

ADVOCACY

As a 501(c) (3) organization, ESA is permitted to lobby but must abide by the Internal Revenue Service’s (IRS) rules in order to maintain ESAs tax-free status. Sections and chapters planning a lobbying activity should coordinate with ESAs Public Affairs Office.

POLICY POSITIONS

ESA periodically issues position statements on policy issues. These must be approved by the Society’s elected Governing Board. Sections and chapters are welcome to suggest public policy topics in which ecology may offer a useful perspective. View ESA positions here: <http://www.esa.org/esa/public-affairs/esa-policy/esa-positions/>

ESA POLICY RESOURCES/OPPORTUNITIES

- **ESA policy handbook, "An Ecologist's Guidebook to Policy Engagement"** provides advice and resources for engaging with decision makers at various levels of government. It also includes overviews of environmental laws, federal agencies, and tips on effective communication. It is available through the ESA eStore.
- **ESA Policy News** is a free resource for those interested in national environmental and science policy. To view and subscribe see: <http://www.esa.org/esa/public-affairs/esa-policy/policy-news-2>
- **ESAs Policy Section** provides networking opportunities for ESA members engaged in or interested in becoming engaged in policy. Contact Andrea Maguire, andreaindicators@gmail.com.
- **ESA Graduate Student Policy Award** is open to all ESA graduate students and provides a two-day policy experience in Washington, DC. For more information visit the webpage, [ESA Graduate Student Policy Award](#).

PART B (WORDPRESS WEBSITE MANUAL)

ESA MAIN WEBSITE

ESA builds its main website on WordPress, which is an open source content management system (CMS). “Open source” is defined as “pertaining to or denoting software whose source code is available free of charge to the public to use, copy, modify, sublicense, or distribute”. A CMS is defined as “a computer program that allows publishing, editing, and modifying content as well as maintenance from a central interface. Such systems of content management provide procedures to manage workflow in a collaborative environment.” The main ESA website strives to create a coherent web presence, streamlined process of updating content and allows for stakeholder participation. WordPress is used to maximize efficiency in the use of staff resources.

In adopting WordPress, ESA has established guidelines for common design elements in an effort to bring continuity to the various ESA websites. These common design elements include basic page layout, color scheme, and logo placement. We believe adherence to these protocols enhances ESA’s brand recognition and facilitates page navigation for users of our websites. This document is intended to provide an introduction to WordPress and an overview of how to use it to manage website content.

CHAPTER AND SECTION WEBSITES

Many ESA chapters and sections have their own websites. It is the responsibility of the Chair to see that the website is updated. Most section/chapter Chairs select an administrator to update their site. Some are hosted at esa.org, while others are hosted externally. Chapter/section members are responsible for updating and maintaining their own web content, although the ESA Webmaster is available to assist them with resolving technical issues, adding functionality, and problem solving.

Although ESA has adopted WordPress as its CMS of choice for all new websites hosted at esa.org, not all chapters and sections are online yet with the ESA CMS. If your chapter/section does not use WordPress, the ESA Webmaster will update the content on your chapter/section website. If your chapter/section does not yet have a website, or if your website is not hosted at ESA, the ESA Webmaster can help your chapter/section establish a WordPress account and set up a website in WordPress. Web-related inquiries can be sent to the ESA Webmaster at webmaster@esa.org.

ESA offers all chapters/sections the opportunity to use WordPress to support their websites and to host their websites at esa.org. We believe broader use of WordPress offers several advantages, both to the chapters/sections and to ESA:

- Using the CMS gives chapter/section members greater autonomy in managing their website content as it frees them from having to rely on the ESA Webmaster to make updates. Chapter/section members managing their own content also allows for greater efficiency in the application of limited ESA staff resources.
- Following format guidelines when using the CMS also leads to increased coherence among ESA websites. The more webpages have a similar look, the more they reinforce the ESA brand.
- Because the CMS offers a robust tool that supports not only editing of content, but also maintenance of content from a central interface, using it allows chapters/sections to integrate documents and create a repository for images, news, profiles, and other media in one place.






WordPress allows for the use of small computer programs that extend the functionality of the site. These plugins include:

- Audio
- Calendaring systems
- Document collaboration
- Forms
- Forums
- Members-only content
- Member profiles
- Photo/video galleries
- Queries/polls
- Social media integration
- Voting
- Analytics

ESA MASTER TEMPLATE AND INDIVIDUAL WEBSITE CUSTOMIZATION

A master template has been developed that predefines the style for our ESA website. Our predefined style sets guidelines for text and background colors as well as page layout, including page width, heading/page/footer width and positioning, and text styling (for regular text, links, and headings). With individual websites some customization is also allowed. However, please refer to the guidelines summarized below.

TEXT AND BACKGROUND COLORS

	Name	RGB	Hexadecimal	Usage
	Teal	RGB(0,99,96)	#016360	Headings
	Light Teal	RGB(0,153,147)	#009993	Headings
	Blue	RGB(0,83,158)	#00539E	Highlights
	Green	RGB(0,144,0)	#009000	Highlights
	Orange	RGB(255,166,0)	#FCA600	Highlights

Text should appear in black on a white background to create a good contrast for reading.

Element	Size	Color (hexadecimal)
P	12px	Black (#000)
H1	36px, Bold	Light black
H2	18px, Bold	Dark Teal (#006360)
H3	14px, Small-Caps	Light Teal (#03bbb7)
Viewport	100%	Width=device-width
Page	1000px Wide	White (#fff)

PAGE LAYOUT

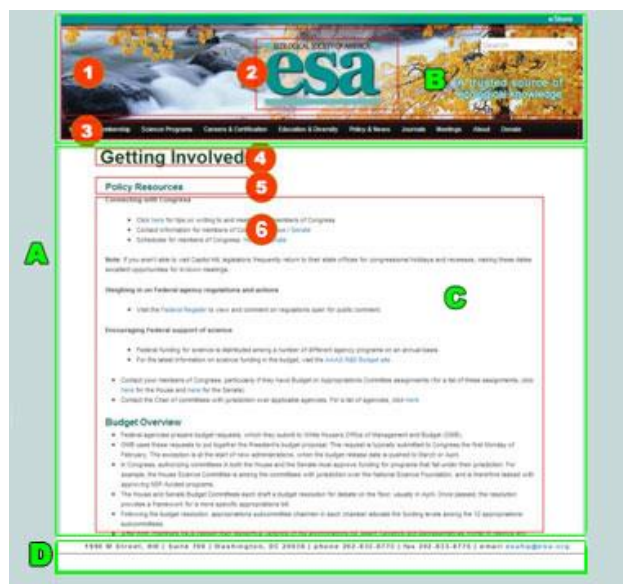
ESA defines the elements of a basic page as follows:

Template areas

- A. Site background
- B. Header
- C. Page
- D. Footer

Page parts

1. Masthead (banner)
2. Logo
3. Menu
4. Page heading (title)
5. Sub heading (title)
6. Page text



CHAPTER AND SECTION WEBSITE CUSTOMIZATION

Elements that chapters/sections should maintain include background, header, and basic font styling, as well as the width and height of pages. Chapter/section members may choose their own banner/logo and customize the page layout within the ESA Master Template constraints. ESA recommends moderation in the use of different font styles.

A good rule of thumb is to choose only 2 different fonts when trying to emphasize content. It is also important to know that underlining on the internet indicates a hyperlink. Therefore do use an underline but instead use bold, italics or a different font size for emphasis.

Be consistent when considering your layout. Try not to incorporate too many different styles and colors into your design.

WORDPRESS USER MANAGEMENT

WordPress has a built-in system that limits which types of functions may be performed by individual users. Users are defined by their *roles* and each role designation corresponds to a set of tasks called *capabilities* that a user with that particular role designation has authority to perform. The default role for all users can be set in **Administration Panels > Settings > General**.

We recommend assigning the highest level role, administrator, to the chapter/section chair who would then control what other users can and cannot do within the site. Chairs would also manage other users' access to such tasks as writing and editing posts, creating pages, defining links, and managing other users, by assigning a specific role to each user.

UNDERSTANDING ROLES AND CAPABILITIES

Within WordPress there are six pre-defined roles: **Administrator**, **Editor**, **Author**, **Contributor**, and **Subscriber**. Each role corresponds to a set of tasks called *capabilities* that one with that particular role designation has authority to perform. Although there are many specific capabilities WordPress supports (e.g., "publish_posts", "moderate_comments", and "edit_users"), the following summarizes the functionality associated with each role.

- **Administrator** – has access to all the administration features within a single site
- **Editor** – can publish and manage posts including the posts of other users
- **Author** – can publish and manage their own posts
- **Contributor** – can write and manage their own posts but cannot publish them
- **Subscriber** – can only manage their profile

The **Administrator** has authority to perform all possible tasks. Although no role should be considered to be senior to another, the range of tasks one has authority to perform narrows with each succeeding role on the list, allowing fewer and fewer tasks to be performed. For instance, a user designated with the **Subscriber** role has the authority only for "read" capability. Roles may be considered also to define users' responsibilities within the site.

MANAGING THE USER PROFILE

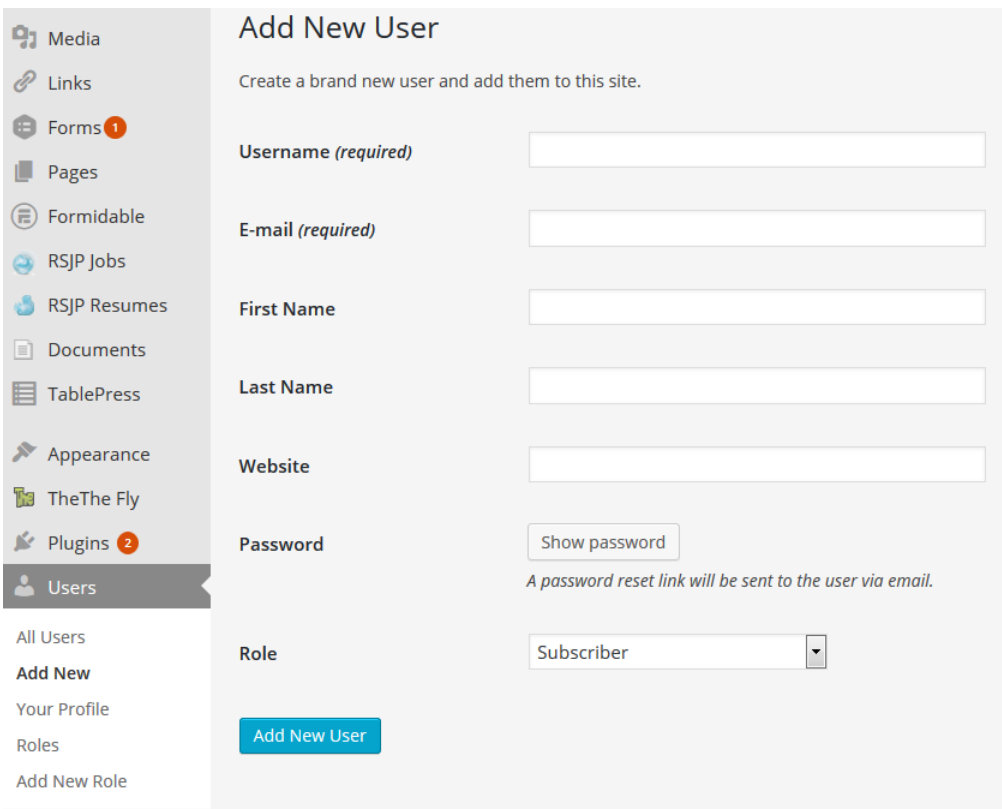
The profile includes the username, passphrase, and email address. You should always keep it up to date. You also should periodically change your passphrase for security reasons. *It is important to use a **secure** passphrase, which meets the following criteria:*

- Include at least 11 characters
- Include both upper- and lowercase letters
- Include numbers
- Include special characters
- Do not use commonly used words
- Avoid words or names that can be guessed by someone who knows who you are. (Words related to your hobbies, religion, work, interests, sports, personal history, names of relatives, etc., are commonly used but very poor sources of passwords.)
- Avoid numbers or letters that are part of your email address.

Maintain the security of your account! Change your pre-assigned password the first time you log into WordPress.

ADDING NEW USERS

The **Add New User** screen allows you to add a new person who can login onto your site



Add New User

Create a brand new user and add them to this site.

Username (required)

E-mail (required)

First Name

Last Name

Website

Password

A password reset link will be sent to the user via email.

Role ▼

ADD NEW USER

To add a new user, you must provide the following information.

- **Username (required)** - Enter the username of the new user. This will also serve as his/her **Login name**.
- **E-mail (required)** - Enter a valid e-mail address for the new user. The e-mail address must be unique for each user. If a published post or page is authored by this user, then when approved comments are made to that post or page, a notification e-mail will be sent to the author.
- **First Name** - Enter the first name of the new user.
- **Last Name** - Enter the last name of the new user (the display name defaults to first and last name).
- **Password (twice)** - Enter a password for the new user twice, once in each text box displayed.

NOTE: Strength Indicator – After the password is entered, a message will appear indicating whether the password entered is Very Weak, Weak, Medium, or Strong (displayed in green). The stronger the password, the more secure the login.

HINT: The password should be at least seven characters long. To make it stronger, include a combination of upper- and lowercase letters, numbers, and symbols (e.g. *!?"\$%^&*).

- **Send Password?** - Check the box to send the password to the new user by email.
- **Role** - Select the desired **Role** for this user from the drop-down box options displayed. **DEFAULT: Administration > Settings > General - New User Default Role**
- **Add User** - Click this button to save the new user's information in the WordPress database. If you do not click this button, the user will not be added. A message flashed at the top of the screen will advise you when the new user has been added.

WORKING WITH WORDPRESS

This section contains a brief description of how to perform the most common tasks as you start to use WordPress. Additional information can be found at <http://www.wordpress.org> and http://codex.wordpress.org/Administration_Screens. The ESA Webmaster also is available to assist you with site related inquiries.

LOGGING IN TO WORDPRESS

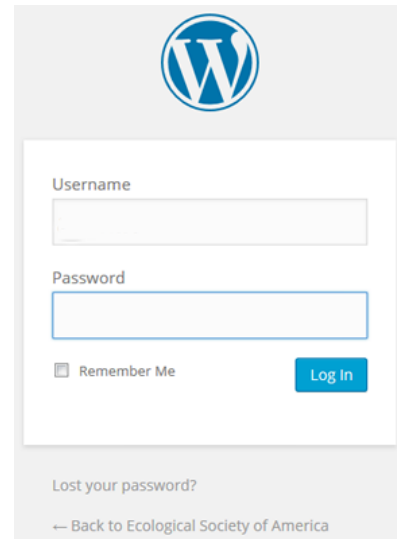
To get started:

- Go to www.esa.org/sitename*/wp-admin.
- Enter your **username** and **password**.
- Click on the **Log In** button.

* *Sitename* here is the name of your site, which is assigned by ESA.

If you do not remember your password:

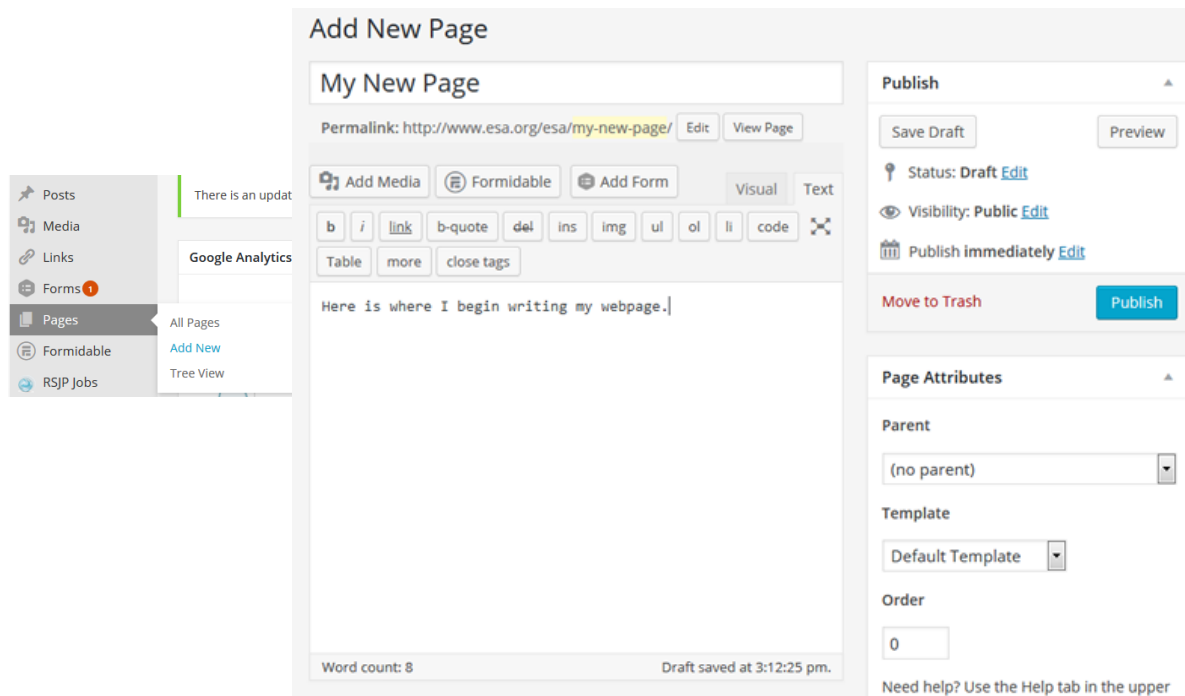
- Click on the **Lost your password?** button under the login box.
- When asked, enter the email address associated with your user account,
or your username.
- Click on the **Get New Password** button.
- Follow the instructions in an email containing a link to reset your password that will be sent to you.



The image shows the WordPress login interface. At the top is the WordPress logo. Below it are two input fields: 'Username' and 'Password'. There is a 'Remember Me' checkbox and a 'Log In' button. Below the login box is a link for 'Lost your password?' and a footer link that says '← Back to Ecological Society of America'.

CREATING PAGES

To create a new page, log into your WordPress account. Select **Administration > Pages > Add New** to access the **Add**



The image shows the 'Add New Page' screen in WordPress. The title is 'My New Page'. The permalink is 'http://www.esa.org/esa/my-new-page/'. There are buttons for 'Add Media', 'Formidable', and 'Add Form'. The visual editor shows a text area with the placeholder text 'Here is where I begin writing my webpage.' and a word count of 8. On the right, there are sections for 'Publish' (with 'Save Draft', 'Preview', 'Status: Draft Edit', 'Visibility: Public Edit', and 'Publish immediately Edit' buttons) and 'Page Attributes' (with 'Parent' set to '(no parent)', 'Template' set to 'Default Template', and 'Order' set to 0). A footer note says 'Need help? Use the Help tab in the upper'.

New Page screen shown below and begin creating a new page.

TITLE EACH PAGE

You should start by giving your new page a title. Avoid using the same title twice. You may use commas, apostrophes, quotation marks, hyphens/dashes, or other symbols in the page title (e.g., "*About My Site - Here's Lookin' at You, Kid*"). WordPress will reformat the title and create a link to the page from the title.

PAGE EDITING AREA

Enter text, links, links to images, and any other information you want to display in this area. You can use either the **Visual** or the **HTML View** to compose your pages.

PREVIEW BUTTON

Click on the **Preview** button to review the page before publishing it.

PUBLISH BOX

This box contains buttons that determine access to your page. The options are **Published**, **Pending Review**, and **Draft**. *Published* means the page has been published on your website for all to see. *Pending Review* means a draft of the page is available for review by those with Editor permissions prior to publication. *Draft* means the page has not been published and will be saved as a draft. Select one of these options from the dropdown menu to publish the page with the corresponding level of access.

VISIBILITY

This feature determines who can see your page. *Public* pages will be visible by all website visitors. *Password protected* pages may only be seen if the password is known. *Private* pages are only visible to those with Editor or Administrator authority.

SAVE

This feature allows you to save your page as a **draft/pending review**, rather than immediately publishing it. To return to a draft later, select **Pages > Edit** from the menu bar and select your page from the list.

PERMALINK

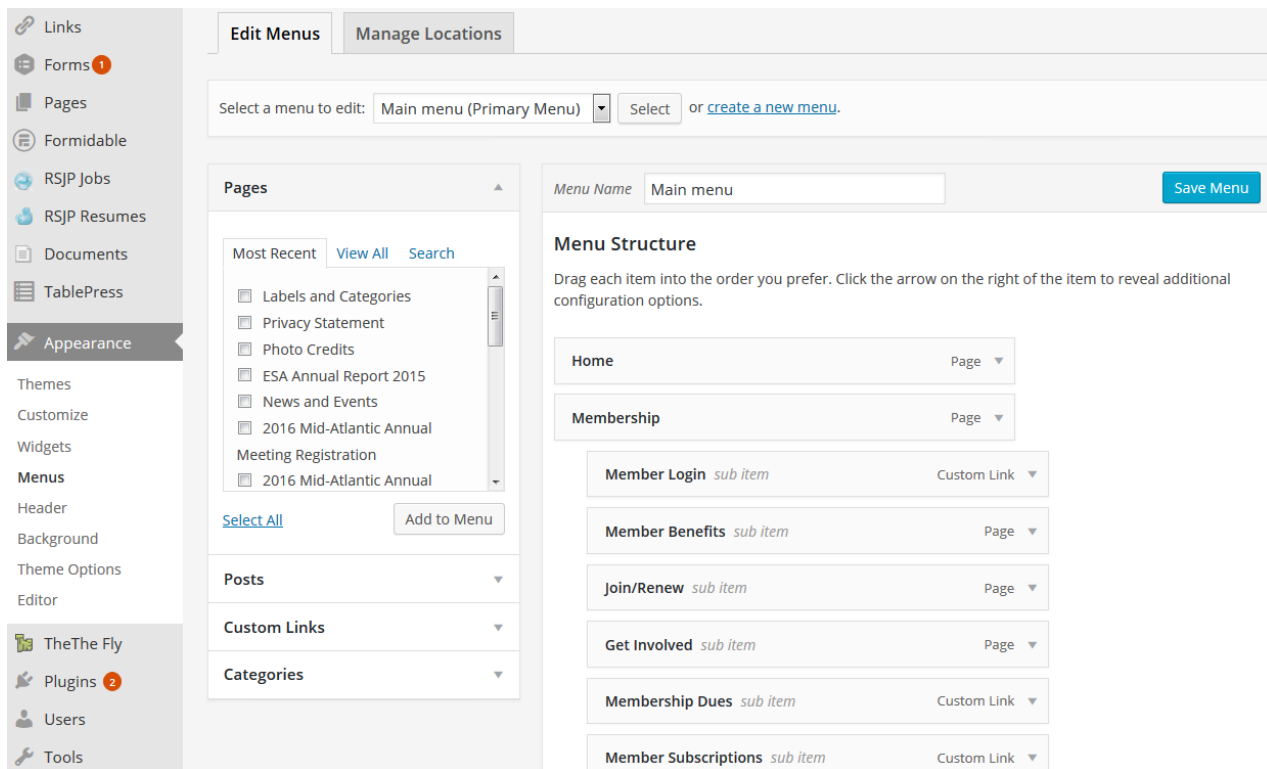
After you save your page, a permalink is automatically created and appears below the title, generating a URL for the page. The URL generated may reformat your title, replacing most punctuation and blank spaces with a dash. For example, if your title is "*My Site - Here's Lookin' at You, Kid*", it will be changed to "*my-site-heres-lookin-at-you-kid*" in the URL. You can also manually change the URL to one that you prefer.

PUBLISH

This feature allows you to publish your page to the site. You can edit the time when the page will be published by clicking the **Edit** link above the **Publish** button and entering the time you want the page to be published. By default, when you first save your page, that will be the date and time your page goes live.

USING WORDPRESS MENUS

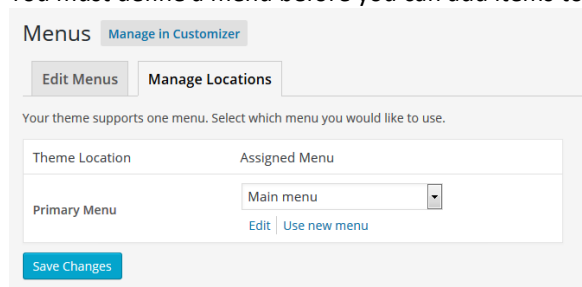
This section covers the basic tasks a user may carry out when using the built-in WordPress menu editor.



The screenshot shows the WordPress Menu Editor interface. On the left is a sidebar with navigation options: Links, Forms (1), Pages, Formidable, RSJP Jobs, RSJP Resumes, Documents, TablePress, Appearance (selected), Themes, Customize, Widgets, Menus, Header, Background, Theme Options, Editor, TheThe Fly, Plugins (2), Users, and Tools. The main area has two tabs: 'Edit Menus' (active) and 'Manage Locations'. Below the tabs, there's a dropdown to 'Select a menu to edit: Main menu (Primary Menu)' and a 'Select' button, with a link to 'create a new menu.'. The 'Pages' panel on the left lists items like 'Labels and Categories', 'Privacy Statement', 'Photo Credits', 'ESA Annual Report 2015', 'News and Events', '2016 Mid-Atlantic Annual Meeting Registration', and '2016 Mid-Atlantic Annual'. There are 'Select All' and 'Add to Menu' buttons. The 'Menu Structure' panel on the right shows a 'Menu Name' field with 'Main menu' and a 'Save Menu' button. Below it, a list of menu items is shown, including 'Home' (Page), 'Membership' (Page), 'Member Login' (sub item, Custom Link), 'Member Benefits' (sub item, Page), 'Join/Renew' (sub item, Page), 'Get Involved' (sub item, Page), 'Membership Dues' (sub item, Custom Link), and 'Member Subscriptions' (sub item, Custom Link).

DEFINING A MENU

You must define a menu before you can add items to it. To do so:



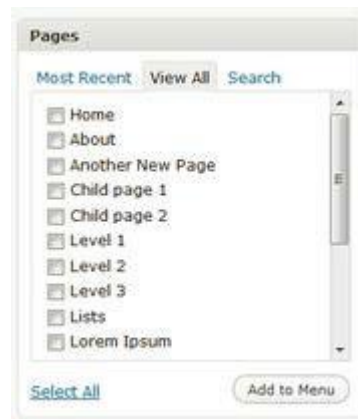
The screenshot shows the 'Manage Locations' tab in the WordPress Menu Editor. It has 'Edit Menus' and 'Manage Locations' tabs. Below the tabs, it says 'Your theme supports one menu. Select which menu you would like to use.' There's a table with 'Theme Location' and 'Assigned Menu' columns. The 'Primary Menu' row shows 'Main menu' in the 'Assigned Menu' column. There are 'Edit' and 'Use new menu' links below the dropdown. A 'Save Changes' button is at the bottom left.

- Login to the Wordpress dashboard.
- From the **Appearance** menu on the left-hand side of the Dashboard, select the **Menus** option to bring up the **Menu Editor**.
- Enter a name for your new menu in the **Menu Name** box.
- Click on the **Create Menu** button.

ADDING ITEMS TO A MENU

The **Screen Options** allow you to select items you add to a menu. Certain items, like **Posts** are hidden by default.

- Locate the panel titled 'Pages'
- Within this panel, select the **View All** link to bring up a list of all the pages on your site.
- Select the pages that you want to add to the menu by clicking the checkbox next to each page's title.
- Click on the **Add to Menu** button located at the bottom of this window to add those page(s) to the menu.
- Scroll back to the **Menu Editor**.
- Click on the **Save Menu** button.



The screenshot shows the 'Pages' panel in the WordPress Menu Editor. It has 'Most Recent', 'View All', and 'Search' tabs. Below the tabs, there's a list of pages with checkboxes: 'Home', 'About', 'Another New Page', 'Child page 1', 'Child page 2', 'Level 1', 'Level 2', 'Level 3', 'Lists', and 'Lorem Ipsum'. There are 'Select All' and 'Add to Menu' buttons at the bottom.

DELETING A MENU ITEM

To delete a menu item, navigate to menus under Appearance.

- Locate the menu item you want to remove in the menu editor window.
- Click on the arrow icon in the top right-hand corner of the menu item/box to expand a menu item.
- Click on the **Remove Link** button. The menu item/box will be immediately removed.
- Click on the **Save Menu** button to save your changes.



CUSTOMIZING MENU ITEMS

The Navigation Label This field specifies the title of the item on your custom menu. This is what visitors will see when they visit your site. **The Title Attribute** This field specifies the Alternative ('Alt') text for the menu item. This text will be displayed when a user's mouse hovers over a menu item.

- Click on the arrow in the top right-hand corner of the menu item to expand it.
- Enter the values that you want to assign for the **Navigation Label** and **Title Attribute** items.
- Click the **Save Menu** button to save your changes.

CREATING MULTI-LEVEL MENUS

When planning the structure of your menu, you should think of each menu item as a heading in your formal document. The main section headings (Level 1 headings) are far left on the page; sub-section headings (Level 2 headings) are indented slightly to the right; any other subordinate headings (Level 3, 4, etc) are indented even further to the right.

The WordPress menu editor allows you to create multi-level menus using a 'drag and drop' interface. You can drag your menu items up or down to change the order of appearance in the menu. Drag menu items left or right to create a sub-level.

To make one menu item a subordinate to another, you need to position the 'child' underneath its 'parent' and then drag it slightly to the right.

- Position the mouse over the 'child' menu item.
- While holding the left mouse button, drag it to the right.
- Release the mouse button.
- Repeat these steps for each sub-menu item.
- Click on the **Save Menu** button in the Menu Editor to save your changes.

Menu Structure

Drag each item into the order you prefer. Click the arrow on the right of the item to reveal additional configuration options.

Home	Page ▾
Membership	Page ▾
Member Login <i>sub item</i>	Custom Link ▾
Member Benefits <i>sub item</i>	Page ▾
Join/Renew <i>sub item</i>	Page ▾
Get Involved <i>sub item</i>	Page ▾
Membership Dues <i>sub item</i>	Custom Link ▾
Member Subscriptions <i>sub item</i>	Custom Link ▾

WORDPRESS PLUGINS

Plugins are 3rd party software packages that can extend WordPress' functionality. There are literally thousands of WordPress plugins available, both free and requiring payment of additional fees.

Before using a specific plugin to add functionality to your website, contact the **ESA Webmaster**. Many plugins can cause disruption on the entire ESA site or cause some elements to not function properly. Often plugins are the main cause of site instability and pose a serious site security threat.

A site that has been hacked can suffer from loss of content, stolen data, and expensive downtime. Maintaining the security of your site helps provide visitors with the best service possible. Because WordPress is such a popular platform

for blogging, it is a regular target for hacking attacks launched by people who find and exploit weaknesses and vulnerabilities in websites. You can increase the security of both your site and the ESA website by being attentive to the items listed below.

SITE SECURITY

1. Basic Precautions

- Report all suspicious activity to the ESA Webmaster.
- Contact the ESA Webmaster if you discover issues with plugins, the site in general, etc.
- Inform the ESA Webmaster of all current administrators of your site.
- If you suspect a breach, notify the ESA Webmaster immediately.
- Deactivate all unused plugins.

2. User-Based Protections

- Create user accounts only for people who will have responsibility for editing your site.
- Do not create unnecessary administrative accounts.
- Do not create accounts for outsiders.
- Delete all inactive accounts.
- Monitor all accounts.

3. Password/Username Protection

- Make sure all users use strong passwords.
- Change passwords regularly.
- Remind all account holders to change their passwords at least twice a year.

COPYRIGHT AND LEGAL ISSUES

All chapters/sections are responsible for the content on their website. Remember:

- Do not use images or any other content you find from common internet search engines (Google, Bing, etc.), unless you can verify the copyright holder and obtain their written permission to use that content.
- Only post images that you are legally allowed to use on your website.
- Include copyright information when you use content that you have not created.
- If you use comments, review these regularly and delete inappropriate content.
- Do not allow hateful or discriminatory content to be posted on your website.

ADDITIONAL RESOURCES

If you need help with your website, feel free to contact the ESA Webmaster, Gordon Potter, by email at webmaster@esa.org, or by phone at 202 833 8773 ext. 210.

The following sites also offer a wealth of information about WordPress.

WordPress Website <http://wordpress.org/>

WordPress Plugin Directory <http://wordpress.org/plugins/>

WordPress Documentation <http://codex.wordpress.org>