

# Colloquy

# Downeast

Information for Facilitators:

Managing Your Colloquy on the Web Site

## Introduction

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Some colloquy facilitators want to control “their” colloquy page as presented on the ColloquyDowneast.org web site.

This document describes how the pages are organized and provides instructions for administering a colloquy’s page.

## Logging In to the Site

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When you log in to the Colloquy Downeast site and have been designated a “Facilitator” by a Colloquy Downeast administrator, the system will recognize your extra privileges and will show you a slightly different page layout:

- **Black Bar.** There will be a black bar at the top of the page, with “Colloquy Downeast” at the far left and “Howdy...” at the right.

This bar is an extra menu that gives you access to a “Dashboard” with extra features available to you as Facilitator.

If you do not see a black bar, the most likely cause is that you haven’t been set up as a Facilitator in the system. Contact [info@colloquydowneast.org](mailto:info@colloquydowneast.org) to get that changed.

## What You Can Do

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As a Facilitator of a colloquy, you have been given special permissions on the web site, which gives you a degree of control over your colloquy.

- **[Check on “Booking” status.](#)** You can see how many (and who) has registered for your colloquy, together with their email addresses. And you can download this information into a spreadsheet (which may make it easier to copy and paste emails, for example).
- **[Edit colloquy description page.](#)** If you wish to, you can change the text on the page describing your colloquy. If you choose not to learn more about WordPress editing, a Colloquy Downeast volunteer will do it for you.
- **[Advanced editing features.](#)** WordPress provides a huge array of capabilities to get the organization and design that you want. As long as it’s consistent with the Colloquy Downeast “brand,” you can utilize these features as much as you like.

## Working with Your Colloquy

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### Viewing/Managing Bookings

To check on (or manage) colloquy bookings:

- Navigate to your colloquy's description page.
- **Click "Edit Event"** in the black bar at the top of the page.
  - You should see a pretty crowded page with lots of boxes (for various settings) in two columns.
- In the **right-hand column**, there should be a box labeled **"Booking Stats."**
- At the bottom of that box, there is a link labeled **"manage bookings."** **Click** on it.
- This will take you to a **"Bookings"** page, on which you can see the registrants, their email addresses, when they registered, whether they've paid, etc.
  - ***Please do not change the payment information (Reject, Delete, Edit/View). You might create havoc for the Treasurer to resolve!***
- You can **change the display settings** by clicking on the **"gear"** icon just above the table of registrants.
- You can **export the table** into a CSV (Excel-compatible) file by clicking on the **"CSV printer"** icon just above the table of registrants.
  - You'll be presented with a dialog box showing **"Columns to export."**
    - Select the information you want to include (such as E-mail) by dragging them to the left so they're highlighted in yellow.
    - Click **"Export Bookings"**
    - Select where you want the downloaded file stored.

### Editing a Colloquy Description Page

To edit your colloquy information:

- Navigate to your colloquy's description page.
- **Click "Edit Event"** in the black bar at the top of the page.
  - You should see a pretty crowded page with lots of boxes (for various settings) in two columns.
- **For simple changes**, you can just make them on the page displayed after **Edit** was clicked.
  - **After making your changes, press the "Update" button** on the right-hand side of the page. ***If you don't press Update, your changes will be lost!***

### The WordPress Editor (generally)

The WordPress editor is reasonably straightforward, though more limited than a full word processor like Word.

- Of the available **styles**, “Paragraph,” “Heading 4” and “Preformatted” tend to make good choices for the body of the description.
- In the edit “toolbar,” there are a variety of formatting controls. If you hover your mouse over the icon, a description will be displayed. Frequently used controls include:
  - **Bold**
  - **Italic**
  - **Bulleted list**
  - **Numbered list**
  - **Insert/edit link**
  - **Toolbar toggle** (to show the following options)
  - **Text color**
  - **Special character**
  - **Increase/decrease indent**
  - **Undo/redo**

### Shortcodes

On the page, there are several so-called “shortcodes” that control aspects of the page’s formatting and performance.

- **[cd\_dropdown\_area]** Pretty much all colloquies have one or more of these shortcodes. The text between the shortcode and its closing mark **[/cd\_dropdown\_area]** is initially collapsed and hidden from visitors to the page. It is displayed when the visitor clicks on the name or down arrow. This is helpful to focus visitors on the “important” text when they visit the page, while allowing them to see more information in a specific subject area if/when they’re interested.

**Editing/updating the text contained within the [cd\_dropdown\_area] shortcodes is one of the most common activities for a colloquy. The reading list changes, additional links are posted, etc.**

- **[cd\_colloquytable...]** All colloquy events start with this shortcode, which formats a standard table describing the facilitators, schedule, etc. and providing a “Register” button if registration is currently available.

If you like, you can edit the shortcode fields enclosed in double-quotes to correct typos, the schedule, etc. ***But do not try to edit the field names—the bits before the “=” signs—themselves. Doing so will “break” the display of the table.***

- **[cd\_registration\_area]** and **[cd\_scroll\_code]** These shortcodes should appear at the bottom of every colloquy event page. The first one provides the form for visitors to register for the colloquy (if registration is available at the time); the second adds some code that helps the page look better when displayed. ***You should never have to change or remove these shortcodes.***

## Advanced Features

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This is a very rudimentary description of the capabilities of WordPress and the ColloquyDowneast.org web site. One of the reasons that WordPress was chosen as the platform for the web site was its powerful features and clear design path for customization.

If you require something a bit “fancier” or some additional functionality, please send an email to [info@colloquydowneast.org](mailto:info@colloquydowneast.org) and we’ll see if your request can be accommodated!