MACPAC WORDPRESS DOCUMENTATION

Prepared by Materiell for the MACPAC Team
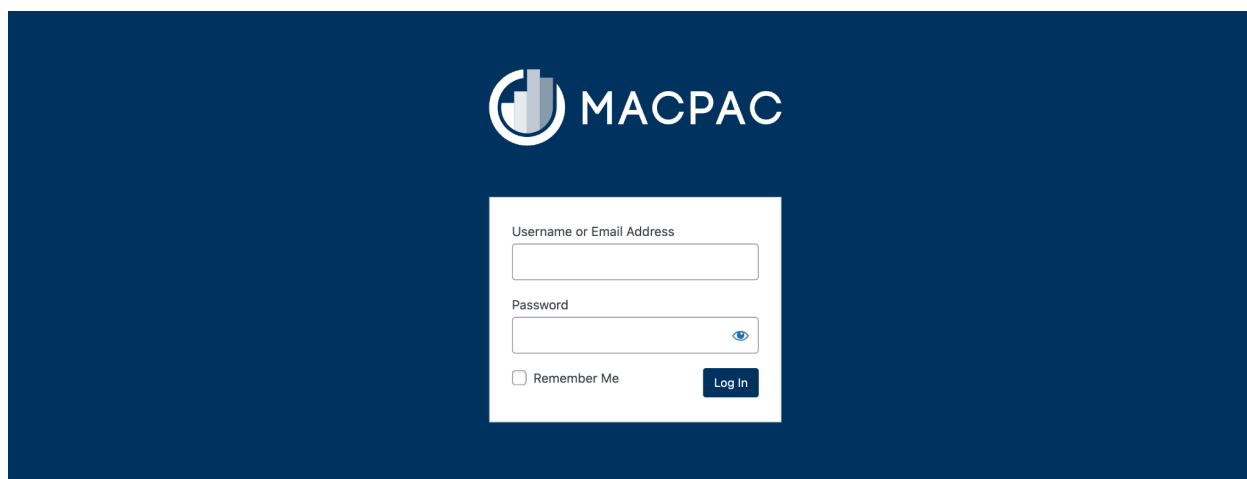
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Table of Contents

Login and New Accounts

Website Login Address: https://www.macpac.gov/wp-admin
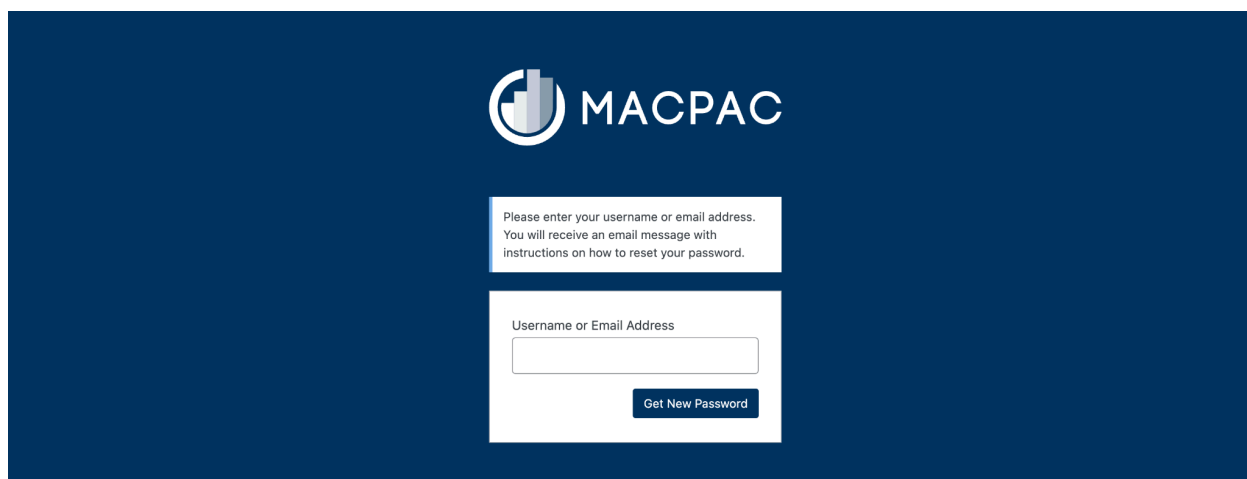
New User Accounts

An administrator of the website can add a user account for you. Please reference the Add New Users section of this documentation for instructions on how to add a new user account.

If the administrator selected for the new account user to receive notification of their new account, you will receive a system email informing you of the account along with a password reset link. The initial reset link is valid for 24 hours.

Resetting Your Password

After the 24 hours, it will expire and you will need to visit the Lost Password page located at https://www.macpac.gov/wp-login.php?action=lostpassword to request a new password reset. Use your email address if you are unsure what your username is.

Admin Bar and Sidebar Navigation
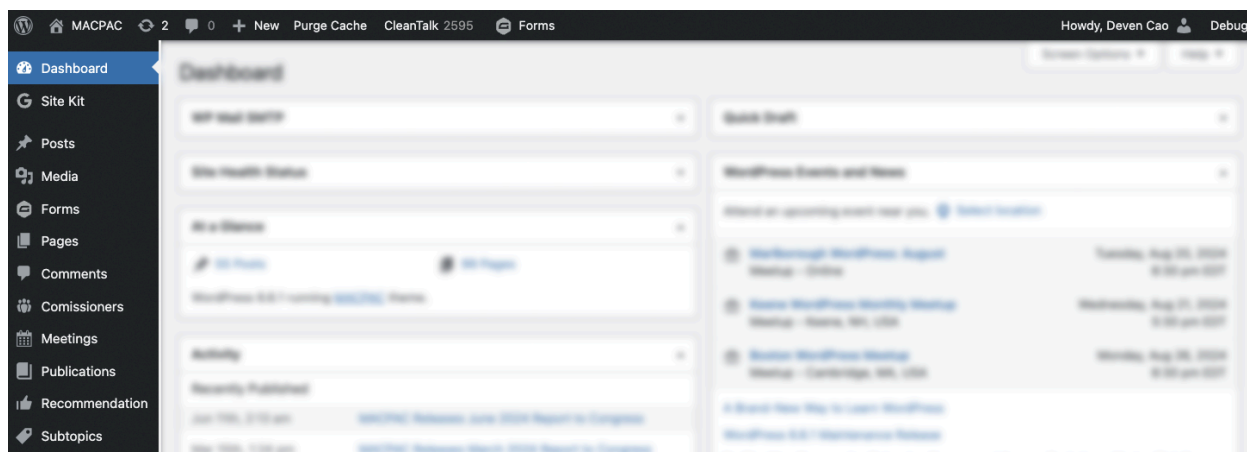
When logged into and viewing the backend of the site, there is an admin bar across the top and a sidebar in along the left. The top bar has quick tool type options whereas the left sidebar allows for navigating the different sections of content in the backend.

Admin Bar
The top admin bar can be used to toggle quickly between the frontend and backend of the site by clicking on the MACPAC link in the upper left. The Purge Cache button should be clicked on to purge the site cache after making changes to the site. Hover over the +New link to quickly add a new post, page, or custom post type.

Custom Post Types (CPT)
In WordPress content management system, everything is technically treated as a post. To prevent confusion and facilitate better content organization, we've split some posts off into their own post types and listed them in the left sidebar.

The following types of content are using CPTs:

- Commissioners
- Meetings
- Publications
- Recommendations
- Subtopics

Posts

MACPAC News, Press Releases, Announcements and similar posts are located in the Posts section of the content management system.

Categories
These types of posts are separated by Categories. Under the Posts heading in the admin sidebar, Categories is a submenu item. New categories can be created and can be nested by first creating a parent category or choosing an existing parent category when adding a child category.

Adding a New Post:

Title and Slug
Enter a title for the post in the designated title field. A slug is automatically generated below the title. In WordPress, the slug is the editable part of the URL of a post or page.

Content
Enter the post content into the rich text editable area and format as needed.

News Details field
If there is a PDF attachment for this post, click on the Add File button in the News Details section below the content editor. A media library prompt will appear to upload the News File.

News Details	▲
News File	Add File

SEO Settings - This feature uses the SEO Framework Plugin

- On the General tab, the fields can be overridden to be more specific and tailored to marketing specific goals. These fields will automatically populate some default values based on the title and content entered above.

SEO Settings	∧ ∨ ▲
⚙ General ◁ Social 👁 Visibility	
Meta Title [?] Characters: 19 – Far too short	Auto Draft - MACPAC ☐ Remove the site title? [?]
Meta Description [?] Characters: 0 – Empty	

- Under the Social tab, the title and description can be added or edited to customize how the post, when shared on social media platforms, appears. Open Graph fields work for Facebook and LinkedIn. Twitter has their own fields. Use the Social Image URL field to add a social media thumbnail to the post.

- In the <u>Visibility</u> tab, the Robots Meta Settings and Archive Settings fields can be set to make this page a published, but searchable, page on the website as long as it's not linked from anywhere else. To do so, set Indexing to noindex, Link Following to nofollow, Archiving to noarchive, and check both Exclusion options under Archive Settings. // *Note:* Please do not use the 301 Redirect URL field on a post by post basis unless there's a way to track these to avoid forgetting that a redirect is set here.

Additional Post Settings Prior to Publishing

Categories
By default, if a category is not selected, the News category will be assigned to the post. Posts should have a category assigned for organization best practice.

Author
Posts can be created and attributed to other users in the system, making them the author of the post. For Posts, the author is not visible on the frontend so this is used as internal metadata only.'

Publish
To publish immediately, click on the Publish button. To change the status of the post, click on Edit next to the Status state. By default, all published pages are set as Public for visibility.

Visibility of posts and page can be changed to password protected which requires a single password to access or to private which only internal users can view.

Posts can also be backdated or scheduled in advance by clicking on the Edit link next to the calendar icon to open up the time and date fields. Selecting a date and time in the past will backdate the post. Selecting a date and time in the future will set the post to draft and schedule it to automatically publish at the designated date and time.

Pages

Pages are mostly static pages in the WordPress content management system. Adding new basic pages is similar to creating posts.

Page Attributes

Parent

Unlike posts, pages sometimes require nesting. For example, Medicaid 101 is a top level page and Administration is a subpage of Medicaid 101. In this case, Medicaid 101 must be selected as the parent. This allows the system to correctly create the URLs. This concept is similar to creating folders and the URL will read as such for this example where it shows the slug for Medicaid 101 first then Administration: /medicaid-101/administration/

Template

By default, the pages use the Default Template which adds a right sidebar area for additional navigation links or other types of custom content. However, other templates can be selected to change the layout of the page content.

- **Blank:** This template allows for complete left to right (true full-width) content and eliminates the left right margin or container of the site. For example, this is seen with the hero slider of the homepage.
- **Full Width (No Sidebar):** This template only removes the sidebar area and stretches the layout across, but maintains the standard left and right margin or container of the site.
- **Meetings and Past Meetings:** These two templates are archives and already applied to their respective pages. They should not be used anywhere else.

Content Builder

Included with the MACPAC theme is the fully customizable content builder blocks.

Meetings

Future meetings and past meetings are both stored in this section of the site.

Adding New Meeting

Click on Add New Meeting in the Meetings section and give it a title. The format for the meetings is currently "Month YYYY Public Meeting." The content editor for future meetings can be left blank if there is no additional information at this time. Scroll down to Meeting Details and choose the Start and End Date/Time information, add a location, attach an Agenda file. Click update to publish the new meeting.

Updating Past Meeting

Past meetings are determined by the timestamp in the Meeting Details date and time picker. Once the time has passed, the post will automatically move from the main Meetings page to the Past Meetings archive page. Navigate to the Meetings section of the site and click on the title of a past meeting to edit it. Update the body content field with information and format as needed. Then scroll down to the Meeting Details area of the page and attach the Transcript file. Click update to publish the new changes.

Publications

Publications is a custom post type and contains several Publication Types.

Publications Type

Publications Type is a taxonomy. The current list of Publication Types include:

- Comment Letters
- Congressional Testimony
- Contractor Reports
- Data Books
- Fact Sheets
- Issue Briefs
- MACStats
- Policy Briefs
- Presentations
- Reference Materials
- Reports to Congress
    - Chapter (Reports to Congress)
- State Policy Compendia

New Publication Types can easily be added. Direct link to Publication Types:
https://www.macpac.gov/wp-admin/edit-tags.php?taxonomy=publication-type&post_type=publication

Topics

Publications can also use the Topics taxonomy. This allows publication posts tagged to show up on the corresponding Topics archive page.

Publications Settings

The publications settings allow a two-way relationship mapping between a parent report and the child reports. Be sure to publish the parent report and child chapters prior to connecting them.

Please note that since these are two-way relational that only one of the following needs to be done and the system will cross reference the other side:

- Open all the chapters and select the parent report, *or*
- Open the parent report and select all the children chapters

Parent Report
Type the title of the parent report in the search field and the results will start to narrow down to remaining matches. Click on the item to add it to the right column. Please select only 1 parent report.

Chapters
Type the title of the chapters in the search field and the results will start to narrow down to remaining

matches. Click on the items to add them to the right column. The items in the right column can be dragged to re-order.

XLS File and PDF File
If a spreadsheet exists, attach in the XLS File field using the Add File button. If a PDF exists, attach in the PDF File field using the Add File button.

Helpful Tips

- Sometimes the names of the Publication may already be in use. The system will automatically add a number to the end of the slug. This occurs when publications from different years have the same name. To avoid the system assigned numbers to the end of the slug, please add a year (-yyyy) to the end to make clear which year that publication belongs to. If there are two chapters in separate reports with the same year, add a month before the year (-mm-yyyy) for clarity.

- Remember to choose the publication type and topics before publishing the post.

Recommendations

Recommendation Topics have already been set up. Individual Recommendation Topics do not have individual pages as they all display on one archival page called MACPAC Recommendations located at: https://www.macpac.gov/recommendation/

Adding New Recommendations to the Existing Recommendation Topics

Navigate to the Recommendation section via the admin left sidebar and choose a Recommendation Topic to add new entries. Inside a recommendation topic, new recommendation entries can be added. To add to the top, hover over the right corner of the top Recommendation Entry and a plus icon and tooltip called Add row will appear. Fill in the blank fields and update the page. Please use the Recommendation Intro field to add a line of text in a merged cell across the three columns above an entry.

Subtopics

Adding a subtopic post is very similar to creating a post. Enter a title, add the body copy, and configure the necessary settings. Instead of selecting a category, make sure to choose a Topic so that it can automatically be added to the Topics archive pages.

Topics

Topics is a taxonomy and not a custom post type. This taxonomy does have frontend support for archive pages and will automatically display new posts tagged to specific Topics. It is visible as a taxonomy for the following custom post types: Publications and Subtopics. To get to the list of Topics, navigate to either the Publications or Subtopics section and Topics will be a submenu item.

Direct Link: https://www.macpac.gov/wp-admin/edit-tags.php?taxonomy=topic&post_type=subtopic

Description
To edit the description of a topic, click on it from the list view and scroll down to the bottom where the Topic Description field is located.

To get a direct link for a specific Topics page, click on View and on the frontend screen, copy the URL from the address bar. If your URL contains ? or .php, then you are still in the backend and that URL will not be viewable by non-users.

Accessibility Best Practices

Alternative Text (Alt Text) for Images

When uploading images to the Media Library, make sure to click on the Alternative Text field of each image and enter in a description for the image. This description is read out by assistive technologies to help people who are visually impaired understand the context and purpose of that image.

Missing Alt Texts is one of the easiest ways for bots to determine that a site is not compliant and are frequently used by third party agencies trying to market their Accessibility services. To avoid unsolicited contact and stay compliant, please enter Alt Text when uploading the image as standard practice.
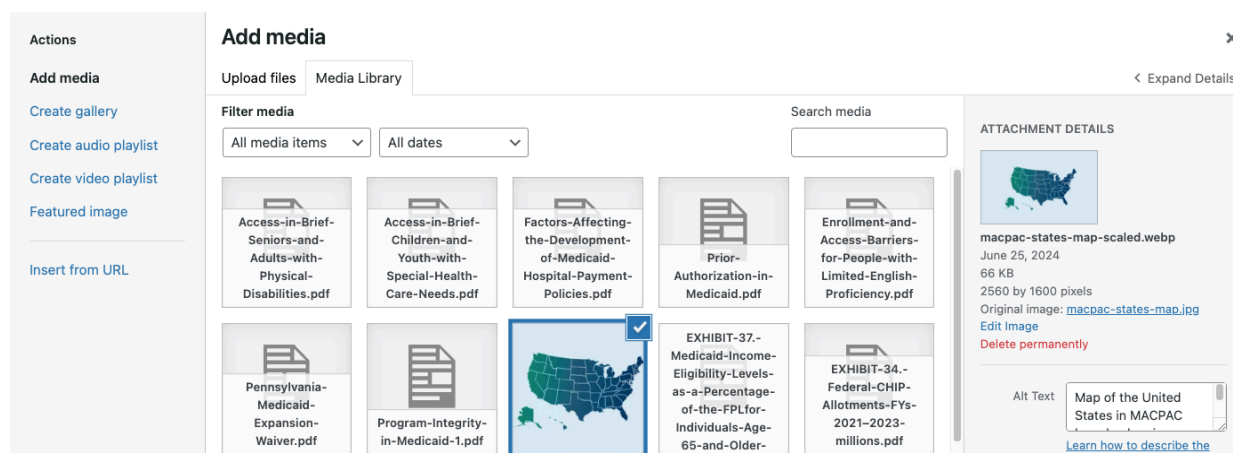
Hierarchical Headings

Headings are pre-styled in the theme and sometimes it's tempting to use a specific heading to achieve a particular style. However, from an Accessibility perspective, it is best practice to apply headings in its natural nested order and not by style. Headings communicate the organization of the content on the page. Web browsers, plug-ins, and assistive technologies can use them to provide in-page navigation. If a particular style is needed for a certain heading level, custom classes can be used to provide specific or new styles. Please request as needed and the Materiell team will get it implemented for use.

Heading 1 is automatically used for Page titles and should not be applied to any content. Additionally, Heading 1 should only be used once on the page for SEO purposes.

Headings can be selected and applied to copy inside of any WYSIWYG or rich text field. In certain plain text fields, HTML markups may be required to apply Headings by wrapping the content in <h2>, <h3>, <h4>, <h5>, and <h6> and closing with corresponding </h2>, </h3>, </h4>, </h5>, and </h6> tags.

Adding New Users

Administrators of the website can add new users by navigating over to the Users section and click on Add New User.

Please note! The username cannot be changed once the user is created.

Enter the username, email address, first and last name, and select the Role for the new User. Website field and Password field are not important as the new user will be able to reset their password when they receive the system email.

In the event that a notification should not be sent, simply uncheck the Send User Notification box and the system will create the account without informing the user.

Click Add New User to finalize and create the user.

User Roles

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

Purge Cache

Caching is enabled to keep the site performant and speedy for visitors. Sometimes, the site cache has to be purged for new changes to be reflected for logged out users. In the top admin bar, there's a Purge Cache button when viewing from the backend of the site and when not inside of any specific post. If inside of a post, the link will says Purge Current Page. Our recommendation is to use the Purge Cache link when not inside of an item instead.
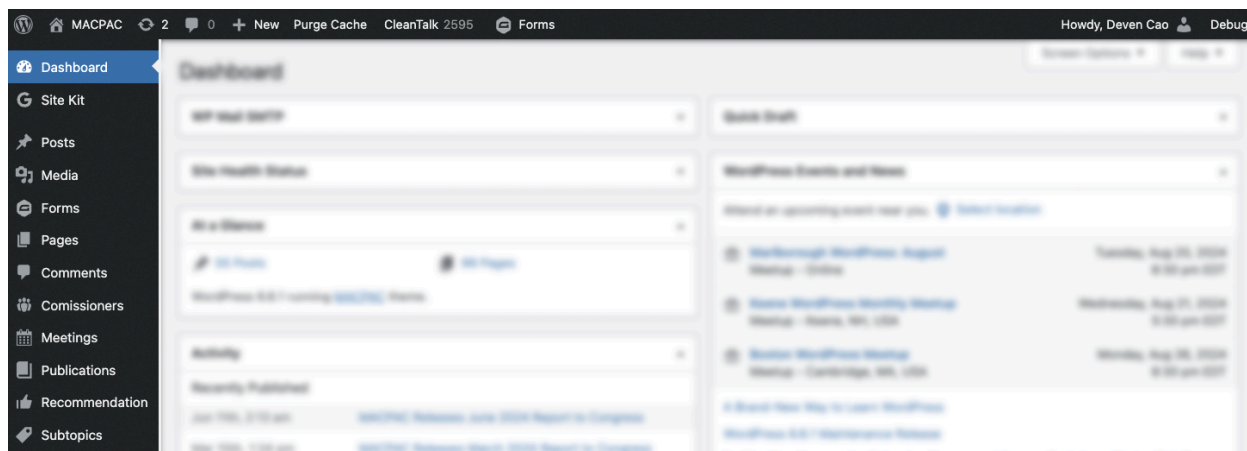
If the issue persists, please open a support ticket at https://materiell.zendesk.com and the Materiell team can flush the server cache.

Support

Please contact Materiell at support@materiell.com with any questions.