

# Managing Your Chapter's Web Site



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## A Chapter Webmaster's Handbook

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### **I. INTRODUCTION**

Like any organization that looks toward the future, your RIMS chapter can be greatly enhanced by an effective Web site. A Web site is a great way to communicate with your current members and attract new ones. And, like all other forms of chapter communication, a Web site is an excellent place to tell your chapter's story.



Designing, hosting and maintaining a Web site can be costly – but not for RIMS Chapters. RIMS has designed a simple-to-use software and hosting system to meet the needs of chapters at no cost. RIMS Web software makes creating and editing a Web site as simple as preparing a Microsoft Word document. RIMS servers host your site while RIMS provides technical support.

### **II. GETTING STARTED**

Three steps must be taken before your chapter's Web site can be developed.

#### **1) Establishing a Webmaster for Your Chapter**

The first step towards developing your chapter's site is determining the individual(s) responsible for designing and maintaining it. The Webmaster, chapter president, secretary and database administrator are the officers who can, through [www.RIMS.org](http://www.RIMS.org), edit your chapter's Web site. For the purposes of this document, all who have access to edit the chapter Web site are referred to as "Webmasters".

The Web Editor software is user friendly. Webmasters need not have any special Web experience. Any fairly creative RIMS member with modest computer experience and an hour a month can create and maintain an effective Web site for your chapter.

Webmaster status depends on your chapter's leadership roster as listed in the RIMS database. Be sure to update your Webmaster's information whenever you report leadership changes to RIMS, either by e-mail or when changing the roster through [RIMS.org](http://RIMS.org). You can confirm your Webmaster's identity by visiting the [RIMS Chapter Directory](#).

### 2) Downloading & Installing RIMS Web Software

The RIMS Web software can be downloaded from the RIMS Web site. *Turn off your pop-up blocker* (some can be temporarily disabled by hitting control-enter) open the link below to begin the installation process.



[www.RIMS.org/download/ewebeditproclient.zip](http://www.RIMS.org/download/ewebeditproclient.zip).

Follow the pop-ups and prompts to install the software. If you have difficulty loading the software, contact your IT department. Your organization's security measures may prevent you from downloading the software yourself. Your IT department should be able to install the software for you or give you the permission you need to do so.

Keep in mind: you will need to install the software on each computer you will be using to manage your chapter's Web site.

### 3) Web Training and Tutorials

This handbook fully outlines how to utilize the Web development software. However, training will promote better results and a more effective Web site for your chapter. Spending some time with your chapter's previous Webmaster may provide you with a good introduction, but you are strongly encouraged to take advantage of the RIMS-provided tutorial.

A top-to-bottom review of the Web software and design with a RIMS staff member can be completed over the phone in an about an hour.

**These tutorials are available to new and veteran Webmasters.**

Generally, an appointment can be set within two or three days of a tutorial request. Tutorial requests and all questions about your chapter Web site should be directed to RIMS at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org) or 212.655.6041.

Completion of the three steps outlined above will provide you with the access and knowledge to modify your chapter's Web site. However, before designing or modifying your site, you should take some time to review your chapter's goals for the site.



### **III. GOALS AND PLANNING**

Planning is key in designing an effective Web site for your chapter. The designer of your site has tremendous influence over the layout and content of the various Web pages. But it must reflect the goals, mission and objectives of the entire chapter. This requires consensus building and planning.

#### **1) RIMS Guidelines**

Before changes to a chapter Web site are made, Webmasters will want to familiarize themselves with the RIMS [Guidelines for Chapter Web Sites](#) developed by RIMS Member and Chapter Services Committee. This document lays out the basic standards for the presentation of information and RIMS registered trademarks. Use these guidelines as a starting point before getting input about the goals of the Web site from the chapter's board.

#### **2) Planning and Purpose**

The Webmaster may wish to make an annual presentation to your chapter's board of directors regarding the Web site, its usage, and any proposed features to be added. This discussion is especially important for chapters preparing a Web site for the first time.

Consider the following questions when planning your chapter's Web site:

- How should the site be used to communicate to members?
- How should the site be used for recruiting new members?
- How can the site make our events more effective?
- How often should new information be put on the site?
- What kind of community outreach do we want to accomplish with the site?
- What is a good way to communicate chapter pride through the site?

#### **3) Appropriate Content**

The right content will help you accomplish your chapter's goals for the Web site. A precaution: *be certain the material you display on your site respects copyrights*. Look for copyright and trademark insignia when considering pictures and textual source materials. When possible, ask questions. With this in mind, use resources that will help present your chapter in the proper light.

The following are always appropriate content for your chapter's Web site



- Photos:
  - Landmarks and characteristics of your chapter's region.
  - Chapter meetings and events.
  - RIMS events such as the Annual Conference.
- Chapter mission statement & bylaws.
- Statement(s) on chapter background & history.
- Chapter contacts & officers (the template makes displaying these especially easy).
- Chapter calendar & meeting schedule.
- Notices of special events.
- Chapter newsletters.
- Links to risk management topics.
- Welcome message from your chapter's president.

#### **IV. INITIAL WEB SITE SET-UP**

Most chapter Web sites are set-up during a tutorial with RIMS staff. Regardless, the process is very intuitive and success can be achieved alone. Nothing you do during the initial set-up is permanent. A Webmaster can decide to make changes at any point during or after the initial set-up process.

##### **1) Accessing the Web Editor**

When registered as the Webmaster, follow the steps below to complete the initial set-up for your Chapter's Web site:

- 1) Go to [www.RIMS.org](http://www.RIMS.org).
- 2) Log in. (Your login is your e-mail address, and your password is your last name, unless you have changed your password.)

GO TO:

- 1) "Chapters"
- 2) "Chapter Officers Tools and Resources"
- 3) "Communications Tools"
- 4) "Website Editor" – select your chapter to edit

A series of screens will then lead you through the four-step

initialization process.

### 2) First Initialization Screen – Setting Up the Top Navigation Bar

The first screen prompts you to complete “Step 1: Select three of the following options to replace Button 1, Button 2, and Button 3 above.” During this step, you are prompted to select the links to the RIMS Web site that you would always want available on your chapter Web site’s top navigation bar for visitors to click on. Briefly described, your choices are:

- RISKWIRE: The daily news clippings of interest to risk and insurance professionals.
- RM Magazine: The electronic version of RIMS magazine.
- RIMS.org: RIMS homepage.
- RIMSCOPE: RIMS bi-monthly e-newsletter.

Simply click on the boxes next to your choices. It is impossible to make bad choices with these links. However, choosing the “RIMS.org” link might be a bit redundant, as the RIMS logo in the upper left hand corner of every page of your site is a link to RIMS Web site.

The first set-up screen also prompts you to complete “Step 2: Please complete the title for your Web site.” This information will be inserted for you. When finished, click “Continue”.

### 3) Second Initialization Screen – the Chapter Contact

The second screen prompts you to complete information that can be accessed through the top navigation bar. “Step 3” prompts you to complete the information for the “Contact Us” button that appears in the top navigation bar. As the creator of the site, your contact information will automatically be inputted in the proper fields when you view this page. If this information is correct, simply click continue. If you would like to have another person listed as the primary contact for your chapter on your Web site, input his or her information. You may also include additional contact information. When finished, click “Continue”.

### 4) Third Initialization Screen – Setting Up the Left



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### Navigation Bar

The third screen prompts you to complete “Step 4”, by choosing links for the left navigation bar. Select the links you would like to include. Each of these links (described fully in “The Web Editor” section) offers different functions which you may want to offer on your site, either now or in the future. **Because you can turn these links on and off whenever you wish, it is recommended you select them all at this stage.**



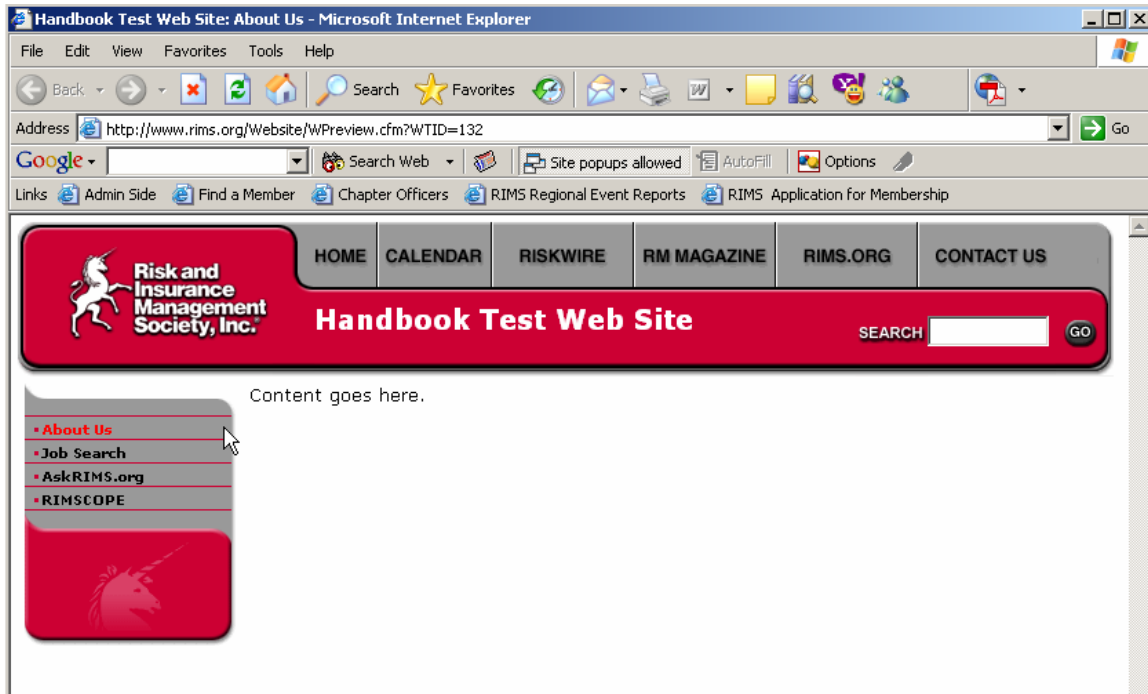
When finished, click “Continue”.

### 5) Fourth Initialization Screen – Picking a Color Scheme

The fourth screen prompts you to make your final choice regarding the site's basic appearance by clicking on your preferred color combination. You will see there are a number of different colors to choose from. Click “Continue”.

### 6) Congratulations!

Following these steps, the process of setting-up your Chapter's site will be completed. Your site's homepage will appear in a new window while your main browser will show the template for making additional page modifications. First, look over your new homepage. It will appear like this:



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Your home page has no content, but the links you have chosen will be included. Notice the following:

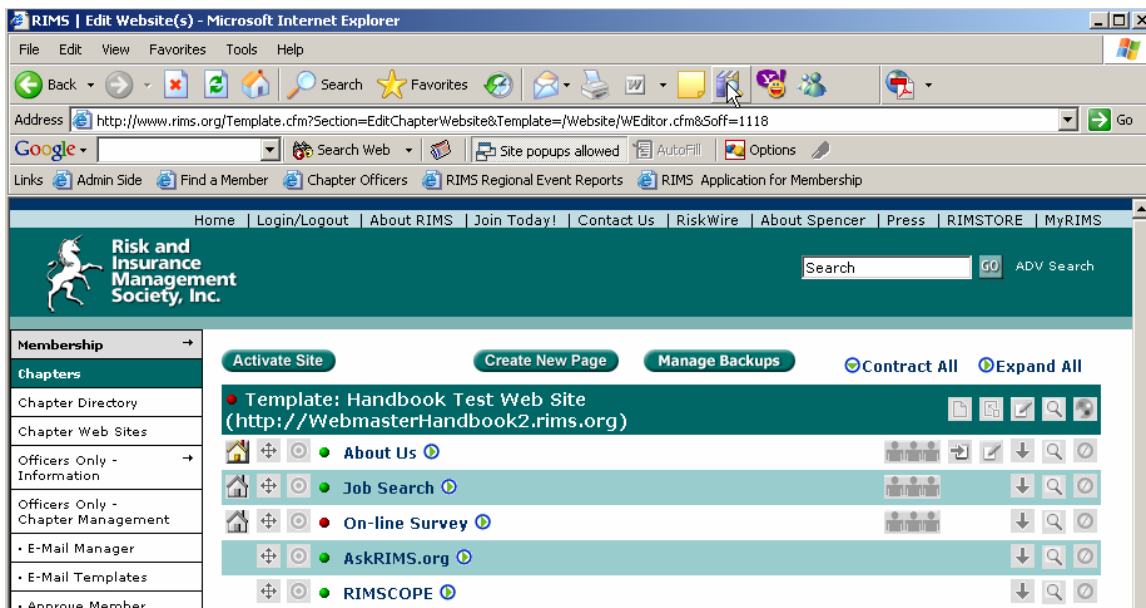


- The two grey fields, called “navigation bars” contain the links you have chosen.
- The RIMS unicorn logo is in the top left corner. It is a link to RIMS Web site.
- The main field for the page says “Content Goes Here” – this is where you will add your chapter’s homepage information, and graphics.
- The search field to the top right searches the RIMS Web site.

Close the window containing your homepage and focus on the Web Editor.

### V. THE WEB EDITOR

The Web Editor serves many functions. It shows you what pages are active and enables modifications of pages, page names, and your Web site’s basic format. Familiarizing yourself with the Web Editor is the next step for Webmasters once the initial set-up is complete.



#### 1) Page Status at a Glance

This Web Editor visually confirms many things about this site:



- The sample site above is not active – the red light by the word “Template” indicates the page is not live.
- The sample site has four pages waiting to be activated – the green lights correspond to the page names to their right. The green lights indicate that these links will be displayed in the left navigation bar once the site is active.
- “About Us” is the home page – the colored yellow house icon indicates that the corresponding page is the home page.
- The “On-line Survey” will not be active – the red light indicates the survey feature is not yet enabled.
- Anyone will be able to access all the sample site’s pages once the site is active– the icon that looks like three men standing next to each other indicates that access to these pages has not been blocked for any visitor to the site.

### 2) Web Editor Icons

More data and options are available through the icons on the Web Editor tool bar “Template” and your chapter’s name. These icons are:



**Create a New Page:** You can create as many pages as you need to achieve your chapter’s Web site goals.



**Add and Modify RIMS Links:** Allows adding and removing of links on the left tool bar.



**Preview the Template:** Opens your Web site in a new window.



**Edit the Template:** Allows adding and removing of links on the top tool bar, also allows modification of the “Contact Us” information.



**Edit Color Scheme:** Allows changing the look of your site by editing the template’s colors.



**View Site Tracking Statistics:** Opens the tracking statistics tool which displays site traffic data.

Webmasters can use this tool to see who has been visiting the chapter's Web site.



Other links and tools are explained in the extensive "Legend" which is displayed at the bottom of the Web Editor page. These will be covered in more detail later in this handbook under "Customizing Your Web Site – Execution".

### 3) Level 1 and Level 2 Links:

There are two orders of links for RIMS Chapter Web pages: Level 1 and Level 2. In the Web Editor, notice the small arrowhead in the circle to the left of the page names. This icon exposes Level 2 links. To expose all the Level 2 links, click on "Expand All" toward the top right of the template.

The primary difference between Level 1 and Level 2 links is how they appear in the left navigation bar. Level 1 links are always visible on the left navigation bar. Level 2 links will not appear on the left navigation bar until their corresponding Level 1 link is activated.

Links can be designated as either Level 1 or Level 2 through the Web Editor. Simply click on the up arrow icon to the far right of the corresponding page name to upgrade a Level 2 link to a Level 1 link. Click on a down arrow icon to achieve the opposite result.

### 4) Basic Page Forms:

The sample Web Editor on page 9 shows some of the page types that have special features. Pages can be added and removed from the Web Editor by clicking on the "Add and Modify RIMS Links" button. These linked pages, plus created pages, make up the 9 page types. An overview:

1. **About Us:** the default home page. When someone visits your chapter's Web site they will go to the home page first. After the initial set up, the page is blank and ready for you to add text, pictures and/or links to make it an effective home page. The "About Us" page links to a special, default Level 2 Link, "Chapter Officers." The "Chapter Officers" page automatically displays the names and, if available, pictures of all chapter officers listed in the RIMS database. Special consideration should be given to your Web

site's home page – the first page most visitors to your site will see. Your home page should make a good first impression, introduce basic chapter information, and make clear how visitors can accomplish the goals that brought them there. Most chapters leave “About Us” as their home page, although many others choose to rename it. You can gain ideas about the right approach for your chapter by reviewing the [sites of other chapters](#).



2. **Job Search:** all chapter Web site visitors can search the RIMS online Job Bank.
3. **On-line Survey:** allows your chapter to set up different kinds of surveys. These can be individually tailored to allow users to select the answer from a list or input it in a field. Survey results can be displayed or held privately. Instructions on how to enable a survey are on page 20. (If you select the On-Line Survey option, be sure to “red light” it until a survey is activated.)
4. **RIMSCOPE:** RIMS bi-monthly e-newsletter. (You also have the option to include a link to RIMSCOPE on the top navigation bar).
5. **Links:** this page is designated for you to create hypertext links to other useful Web sites.
6. **Membership:** the Membership link will provide a Level 2 link to connect your site's visitors directly to the RIMS Web site membership page. Webmasters should erase the default “Content Goes Here” message and prepare an appropriate message urging visitors to consider applying to RIMS through the links that appear on the left.
7. **Membership Categories:** this link will connect your site's visitors directly with an explanation of RIMS membership categories, classes, and fees on RIMS Web site.
8. **Membership Benefits:** links site visitors with an explanation of membership advantages and benefits on RIMS Web site.
9. **Created Pages:** by clicking the “Create New Page” button icon in the Web Editor, you can create and name a new page. There is no limit to the number of pages you can create. The new pages

will be blank, waiting for you to provide content and purpose.



### 5) The Legend

At the bottom of your Web Editor page is a legend. The legend provides a quick reference guide to Webmasters by briefly explaining the meaning of the icon buttons on the Web Editor page. If you are not sure how to perform a function, you can refer to this handbook or the legend. Both will be able to help you. The legend is below:

## VI. CUSTOMIZING YOUR WEB SITE

All changes to your Web site and individual Web pages begin at the Web Editor. Some functions are less complicated to execute than others. For this reason, this section is broken down into the following subsections: "Basic Web Editing," "Advanced Web Functions," "Data Management," and "Editing the Template / Format."

### **BASIC WEB EDITING**

#### 1) Adding a New Page

You will need to add new pages in order to make full use of your chapter's Web site. Before you create a page, have its mission and title in mind. When you create the page, it will appear on the bottom of the Web Editor as a Level 1 link.

From the Web Editor:

- 1) Click on the "Create New Page" button in the top middle of the Web Editor page.
- 2) Input the name of the new page in the "Web Page Title" field.
- 3) Click on the "Save and Go Back" button.
- 4) If you are ready for the page to be activated, click on the "red light" to the immediate left of the page name. A red light indicates that the page is not live; a green light indicates that a page is live. You can toggle between settings by clicking on the light. (You should not activate a page until content has been added).

#### 2) Adding and Positioning Text

Most Web pages on your site will require personalization. Adding text and getting it to appear as you wish is perhaps the most useful and necessary skill for chapter Webmasters. Choose from eight heading options, six font options, and seven font size options.. Also available are bold, italics and underline options, as well as a wide palette of colors.



From the Web Editor:

- 1) Identify the page you want to modify.
- 2) Click on the “Edit this page” icon (it looks like a diagonal pencil over a piece of paper).
- 3) Highlight the default “Content goes here” text and hit delete.
- 4) Click anywhere in the field and begin typing your message.
- 5) When you have finished typing, highlight any portion you would like to further modify (size, font, color, etc.)
- 6) The icons and fields for modifying text are similar to their counterparts in Microsoft Word. To change the heading setting, font, or font size use the pull down menus on the bottom left toolbar. Click on the appropriate icons for other modifications (bold, italics, color).
- 7) Position text by utilizing the “align” icons, which are on the top right toolbar. The images resemble their counterparts in Microsoft Word. Highlight the text you would like to position, and then hit the appropriate icon.
- 8) Once you are satisfied with your changes, click “Save”.
- 9) You will have the opportunity to preview the page. If the page appears as you wish, hit “continue” to return to the template. If not, hit the “back” button on your browser and continue modifying the page.

### 3) Adding and Positioning Pictures

Adding pictures is easy – as long as you remember three things. First, be sure the picture you want to use is saved as a **.jpg** or **.gif** file. Second, be sure the name of the picture has no spaces (example: “picturefile.jpg” is perfect while “picture file.jpg” will not work). Third, make sure that the picture is saved at an appropriate size for use on your chapter’s Web site.

Adding a picture in the Web Editor:

- 1) Identify the page you want to modify.
- 2) Click on the “Edit this page” icon (it looks like a diagonal pencil over a piece of paper).

- 3) If necessary, highlight the default "Content goes here" text and hit delete.
- 4) Make sure that your Pop-up Blocker is disabled.
- 5) Click on the icon that looks like a mountain against a yellow background. (This brings up the "Picture Dialogue" box).
- 6) The "Picture Properties" box will open. Hit "Select New File".
- 7) The "Image Manager" box will open. Hit "Browse".
- 8) The "Choose File" box will open. Go to where the picture is found on your computer. Double click on the picture file you want to include on the Web page.
- 9) Hit "Upload Image" in the "Image Manager".
- 10) If the image in the Image manager is part or the entire image you want to bring to your Web page, hit "OK".
- 11) In "Picture Properties", hit "OK".



The image will appear on the page. Now it can be positioned.

- 1) Left-click on the image you would like to move.
- 2) To position horizontally, use the "align" icons on the top right toolbar. These also resemble their counterparts in Microsoft Word.
- 3) To position vertically, left click to the left of the picture. Hit the enter key to move down and the backspace key to move up on the screen.
- 4) When satisfied, hit "Save".
- 5) If the page appears as you wish, hit "continue" to return to the Web Editor. If not, hit the "back" button on your browser to continue modifying the page.

Pictures can also be positioned in reference to other graphics and text on the page. Follow these steps to use this positioning option:

- 1) Right-click on the picture.
- 2) Select "Picture".
- 3) In the "Picture Properties" box, click on "Alignment".
- 4) Choose the alignment setting.
- 5) Click "OK".

#### 4) Adding Hyperlinks

Hyperlinks make the Web a unique medium for communicating with members and potential members. They provide instant cross referencing and access to related documents. You can add hyperlinks

to your pages and allow site visitors to instantly visit other Web sites of your choosing.



From the Web Editor:

- 1) Identify the page you want to modify.
- 2) Make sure that your Pop-up blocker is disabled.
- 3) Click on the "Edit this page" icon (it looks like a diagonal pencil over a piece of paper).
- 4) If necessary, highlight the default "Content goes here" text and hit delete.
- 5) Type in the text you would like to serve as the link.
- 6) Highlight the text.
- 7) Click on the "Hyperlink" icon (looks like a globe with chain links in front of it). The "Hyperlink" box will appear. Type or paste the URL in the "Link" field, for example: <http://www.pbs.org/>.
- 8) If you want the link to open in a new window, select "New Window" in the "Target Frame" field of the Hyperlink Box.
- 9) Hit "OK" in the Hyperlink Box.
- 10) If satisfied, hit "Save".
- 11) If the page appears as you wish, hit "continue" to return to the Web Editor. If it does not, hit the "back" button on your browser and continue modifying the page.

### 5) Uploading PowerPoint, Word and PDF Files

Chapter newsletters, announcements, invitations and other chapter documents are often drafted as Word or PDF files. You can upload these documents directly to your page, allowing anyone with the corresponding software to view and print them.

Like picture files, documents to be uploaded need to be saved correctly. Be sure the name of the file has no spaces (example: "golf2005.doc" is perfect while "golf 2005.doc" will not work). Also, a document cannot be uploaded onto a page that already contains other content or another uploaded document. You must create a new page before uploading a document to your chapter's Web site.

From the Web Editor:

- 1) Create the page on which you want to upload the document.

- 2) Click on the "Upload a file" icon (looks like an arrow pointing into a piece of paper).
- 3) Click on "Browse" and find the file on your computer.
- 4) The "Choose File" box will appear. Find the file you wish to upload, and click on "Open."
- 5) Click on "Save and Go Back."



#### 6) Adding Video Clips

Your chapter Web site can include videos, which can be accessed either through a link on the left navigation bar or through a link on a page.

To add a video with a link on the left navigation bar, from the Web Editor:

- 1) Click on the "Create New Page" button.
- 2) Type in a page name.
- 3) Click on "Browse" and upload the file (this will take some time to do).
- 4) Click on "Save and Go Back".

If you want the video to be a button on the left hand navigation bar, this is all you need to do. To add a video with a hyperlink in a Web page, also complete the steps above, then:

- 1) In the Web Editor make the new video clip page inactive by giving it red-light status.
- 2) View the red-lighted page by clicking on the corresponding "Preview this Page" icon (resembles a magnifying glass).
- 3) Copy the URL of the red-lighted page from the address bar, and then close the page.
- 4) In the Web Editor, create a new page and name it appropriately or go to the page on which you would like to place the hyperlink.
- 5) Prepare text and a hyperlink (instructions above) – the hyperlink will send visitors to the red-lighted page containing the movie clip.
- 6) Paste the URL of the red-lighted movie clip page in the URL field.
- 7) Save the page and return to the template.

#### 7) Changing a Page Name

From the Web Editor:

- 1) Click on the name of the page you wish to change.
- 2) Input the name of your choosing in the "Web Page Title" field.
- 3) Click "Save and Go Back".

Upon completion of the last step, the name of the page will be changed, and you will be returned to the Web Editor.



### **8) Changing the Order of Links in the Left Navigation Bar**

Generally, the links closest to the top of the left navigation bar strike the eye first. You may wish to change the order of the links in the left navigation bar to reflect changes in page importance.

In the Web Editor:

- 1) Identify the page you wish to move.
- 2) Click on the four pointed arrow icon located to the left of the page you wish to move.
- 3) Identify where you want to move the page.
- 4) Identify the page that you want the page to be directly in front of.
- 5) Click on the target icon corresponding with that page.
- 6) After a pause, you will see the template adjust and accommodate your move.

### **9) Changing links from Level 1 to Level 2 and Level 2 to Level 1**

As noted in "The Web Editor" section of this handbook, Level 2 links only appear in the left toolbar when a corresponding Level 1 link is activated. Additionally, Level 2 links only appear on the Web Editor when they are exposed by clicking on "Expand All" toward the top right of the Web Editor. You can adjust the status of links easily.

From the Web Editor:

- 1) Identify the page you want to make Level 1 or Level 2.
- 2) If the link is to be promoted to Level 1, click on the up-arrow icon to the far right. If the link is to be demoted to Level 2, click on the down-arrow icon to the far right.

### **10) Deleting Pages**

Some pages seem to be obvious candidates for deletion. Old newsletters probably have no value – why keep them on your Web site? But before you delete, consider two possibilities: red-lighting and archiving. Just clicking the page's green light to red in the Web Editor will make the pages invisible to visitors – but the Webmaster will still have access to them. Archiving is simple and fully described in section VI, 3 of this handbook. Who

knows when a former newsletter contributor wants a copy of a past masterpiece?



Some pages should never be deleted. You may not have any plans to activate the “On-line Survey” page, but deleting the page will make it necessary for RIMS staff to restore it should your chapter ever choose to use the function in the future. When in doubt, deactivate or archive, don’t delete.

When you choose to **permanently** delete a page, the process is simple.

In the Web Editor:

- 1) Identify the page you want to permanently delete.
- 2) Click on the corresponding “Delete this page” icon (the “ban” icon to the far right).
- 3) Click “OK” to finalize the deletion.

This will permanently delete any pages **not backed-up in the archives**. To learn more about removing archived files, see “Using the Archives”, section VI, 3.

### ADVANCED WEB FUNCTIONS

#### 1) Adding and Positioning Tables

Tables can be used to provide additional formatting to a page and present information in a structured way. Individual cells can be filled with text and colored for dramatic and unique style effects. However, they are among the trickiest and quirkiest elements of the RIMS Web Editor software.

If you want to apply spreadsheet-type data to your site, tables are not your best option. A better approach would be to prepare a MS Excel spreadsheet, copy and paste it into a graphics application like MS Paint or Adobe Photoshop, save it as a **.jpg** file, and save the image to the Web site as you would any other picture file.

Adding a table, from the Web Editor:

- 1) Identify the page you want to modify.
- 2) Make sure your Pop-up blocker is deactivated.
- 3) Click on the “Edit this page” icon (it looks like a diagonal pencil over a piece of paper).

- 4) If necessary, highlight the default "Content goes here" text and hit delete.
- 5) Click on the "Table" icon in the middle of the top tool bar (it is white and blue) and select "Insert Table".
- 6) Specify the number of rows and columns, and colors for your table in the 'Insert Table Box', then hit "OK".
- 7) The table size may be much smaller or larger than you require. You can modify the table size by positioning the cursor over a part of the table's border, then clicking when the cursor becomes four-pointed. After this, the table can be modified by placing the cursor over a corner and, when the two-pointed cursor appears, clicking and holding while you move the mouse to resize the object. (You can also adjust the width of a created table by right-clicking on the table, selecting "Table Properties" and inputting specific percentages or pixels in the "Width" field).



The table will appear on the page. Now it can be positioned:

- 1) Place the cursor on a border of the table and left-click when the cursor becomes four-pointed.
- 2) To position horizontally, use the "align" icons on the top right toolbar. These resemble their counterparts in MS Word.
- 3) To position vertically, left-click to the left of the picture. Hit the enter key to move down and the backspace key to move up on the screen.
- 4) When satisfied, hit "Save".
- 5) If the page appears as you wish, hit "continue" to return to the template. If not, hit the "back" button on your browser and continue modifying the page.

Tables can also be positioned in reference to other graphics and text on the page. Follow these steps to use this positioning option:

- 1) Right-click on the table.
- 2) Select "Picture".
- 3) In the "Picture Properties" box, click on "Alignment".
- 4) Choose the alignment setting.
- 5) Click "OK".

## 2) Surveys

One of the most powerful tools available to Webmasters is the online survey tool. The survey tool allows chapters to quickly and easily assess site visitor

statistics, enabling decisions based on data rather than guesswork. Among its many capabilities, the survey tool permits:



- Numerous formats: Your surveys can be multiple-choice, short-answer or one of many different formats.
- Participation restrictions: Survey responses can be limited to all site visitors, only Corporate and Associate Members, or all members except Associate Members.
- Data restrictions: Access to survey results can be restricted or open to the public.
- Unique questions: The survey designer drafts all questions.
- Confidentiality options: Survey participants can be anonymous or identified.
- Reporting options: Results can be displayed in charts, overviews, or downloaded as a .csv file for a spreadsheet.
- Printable questionnaires: Your survey can also be added to the Web site in a Word document, which gives respondents the ability to answer online or on a printable version to fax or mail back to your chapter.

If “On-line Survey” is a page listed on your Web Editor, simply click on the “On-line Survey” to begin the process. If the survey is not enabled, click on the “Add and Modify RIMS Links” icon in the Web Editor and check the “On-line Survey” box.

The survey set-up process is fairly intuitive. However, you are encouraged to contact RIMS at 212.655.6041 when you would like to put a survey together.

### **3) Restricting Access to Pages (except uploaded files)**

Webmasters can choose to make some pages visible exclusively to specified groups, such as all members or Deputy Members only. Chapters have utilized this feature to ensure privacy regarding upcoming elections, to ensure that only members have access to surveys, and to restrict access of information to members-only.

From the Web Editor:

- 1) Identify the page for which you wish to change the access restriction setting.

- 2) Click on the corresponding privacy settings icon (that looks like men standing next to each other) to the far right of the page name.
- 3) Select one of the three security settings and click on "Save Changes".
- 4) You will be returned to the Web Editor where the new setting will be represented by a change in the icon.



#### 4) Restricting Access to Uploaded Files

Currently, the Web Editor software does not allow access restrictions to pages with an uploaded document. A workaround has been identified and successfully implemented by chapters.

From the Web Editor:

- 1) Begin the process by uploading the document to a page.
- 2) In the Web Editor make that page inactive by giving it red-light status.
- 3) View the red-lighted page by clicking on the corresponding "Preview this page" icon (resembles a magnifying glass).
- 4) Copy the URL of the red-lighted page from the address bar, and then close the page.
- 5) In the Web Editor, create a new page and name it appropriately.
- 6) Prepare text and a hyperlink (instructions above) – the hyperlink will send visitors to the red-lighted document.
- 7) Paste the URL of the red-lighted document page in the URL field.
- 8) Save the page and return to the template.
- 9) Change the access status of the page containing the hyperlink to the uploaded document page.

## DATA MANAGEMENT

### 1) Backing-Up Web Pages

Occasionally, mistakes are made and pages are inadvertently lost or erroneously altered. Just as you back up other files, the RIMS Chapter Web Editor software allows your Web pages to be backed up. It is recommended you do this with all important documents and pages whenever you make any major changes to your Web site, and at least twice a year.

Backing up your files is also a good idea because doing so creates an electronic archive for your chapter. If you delete a file **that is backed-up** it does not get completely deleted but instead remains in the

archives. If you wish to clear out your inactive/historical files from your active Web Editor area you can back them up and then delete them. This will move them to your archives.



Backing up files, from the Web Editor:

- 1) Click on the “Manage Backups” button on the top of the Web Editor page.
- 2) Identify a page you want to back up, and click the corresponding “Create a New Backup” button.
- 3) You can backup all pages at once the first time you are backing up your site by clicking on the “Backup All Pages Button.”

Restoring files, from the Web Editor:

- 1) Click on the “Manage Backups” button on the top of the Web Editor page.
- 2) Identify the page you want to restore, and click on the “Preview Backup” to be sure the information you want is there.
- 3) Click on the “Restore from Backup” button.

#### **2) Using the Archive**

As mentioned above, whenever you back up a page and then delete the page from the Web Editor, a copy of the deleted file remains in the archive. You can use the archive to store as many documents as you wish. Your chapter probably has a box of files that needs to be passed from officer to officer as terms end and begin. Why not place those files in an electronic archive? They will be safer, and much lighter. RIMS encourages you to scan and upload important documents to the archives section of your chapter's Web site.

Restoring Archived Files, from the Web Editor:

- 1) Click on the “Manage Backups” button on the top of the Web Editor page.
- 2) Click on the “Go to Archives” button (this button will not appear if you have not created an archived file. Create an archived file by creating a backup and then deleting the original page in the Web Editor).
- 3) Click on the “Restore from Archive” button that corresponds to the appropriate page.
- 4) Return to the Web Editor – the restored page will appear at the bottom.

#### 3) Using Tracking Statistics

You or your Board may be interested in knowing how effective your Web site is. A good way to measure this is by looking at the tracking statistics for your Web site.



From the Web Editor:

- 1) Select the page for which you want to see visitor data, or determine if you want data for the entire site.
- 2) Click on the corresponding "View site tracking statistics" icon (looks like a bar chart) on the far right.
- 3) Manipulate the data fields to select the dates you want data. Then hit "Submit".

Following the above steps, you will be given options to display or save your survey data. The data can be presented in charts, or saved to a .csv file for further modification in a Microsoft Excel spreadsheet.

#### EDITING THE TEMPLATE / FORMAT

##### 1) Updating Contact for "Contact Us" Button

Generally, the "Contact Us" button on the top navigation bar provides the information of your current chapter Webmaster or president. Changing the data fields is easy.

From the Web Editor:

- 1) "Click the Edit the Template" icon (looks like a diagonal pencil over paper), which is located on the right of the dark green bar with your chapter's name.
- 2) Enter the data for the new contact in the appropriate fields.
- 3) Click on "Save Changes".

##### 2) Changing Buttons on the Top Navigation Bar

Changing the buttons on the top navigation bar is just as easy as changing the "Contact Us" data. The process is the same.

From the Web Editor:

- 1) Click the “Edit the Template” icon (looks like a diagonal pencil over paper) which is located on the right of the dark green bar with your chapter’s name.
- 2) Check the three boxes representing the buttons you wish to have in the top navigation bar.
- 3) Click on “Save Changes.”



### 3) Changing Buttons on the Left Navigation Bar

Adjusting the left navigation bar is simple and straightforward.

From the Web Editor:

- 1) Click the “Add and Modify RIMS Links” icon (looks like a small box entering a larger box).
- 2) Select the links you want displayed in the left navigation bar by checking the corresponding boxes.
- 3) Click on “Save”.

Remember: You can simply deactivate pages if you want to remove them from the left navigation bar.

### 4) Changing the Color Scheme

Looking for a fresh new look? Consider changing your Web site’s color scheme.

From the Web Editor:

- 1) Click on the “Edit the color Scheme” icon (looks like a painter’s palate) which is located on the right of the dark green bar with your chapter’s name.
- 2) Click on the button corresponding with the color scheme of your choice.
- 3) Click on “Save Changes”.

### 5) Default Page Information

Every page within a chapter Web site is automatically tagged with two pieces of information:

### 1) **Last Modified Date:**

The date of a page's last modification is provided at the bottom of every page by default, allowing visitors to assess the freshness of the information. Any change to a page, no matter how small, will refresh this date. Note: this date will not show up on RIMS.org pages that can be accessed through your chapter's site.



### 2) **Legal Notice:**

Following the copyright information on the bottom of your Web pages is a link to a more detailed legal notice. This is the last item on every page on your chapter's site. You can review this information by clicking on the following link:

<http://www.RIMS.org/chapterwebsite/ChapterLegalNotice.htm>.

As your experience grows, so will your understanding of the Web Editor software's quirks. Occasionally, you may feel that some problem is keeping you from making a change to your page that you should be able to make. Contact RIMS by phone at 212.655.6041 or by e-mail at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org). RIMS staff will be happy to assist you.

## **VII. RIMS REQUIREMENTS AND GUIDELINES**

This handbook is designed to familiarize the chapter Webmaster with the RIMS Web Editor software. Other documents are designed to provide chapter officers with information regarding the requirements and guidelines for your site.

RIMS Member and Chapter Services Committee has developed the guidelines listed below to assist you with the administration and maintenance of one of your chapter's most powerful communication tools - your Web site. Click on the links to the guidelines below for more information on creating and updating your site:

1) **Required Content:** The content included here is to appear on the Web site of each RIMS chapter in order to maintain consistency and for quality assurance.

2) **Recommended Content**: An informative, balanced RIMS chapter Web site includes some standard links and content. RIMS suggests that the items included here appear on your chapter's Web site.



3) **Tips to Better Manage Your Chapter's Web Site**: This information includes tips to help your chapter maintain a well balanced and accurate Web site.

4) **Future Enhancements**: The items listed here are additional features that would ease the administration for chapter Webmasters. These items are in queue waiting budgetary support.

### **VIII. CONCLUSION**

Serving as your chapter's Webmaster can be a very rewarding experience. It makes you an essential part of your chapter's recruiting, administrative, document management, and planning activities. While that seems like a lot of work, many Webmasters report they also find managing the Web site to be a lot of fun.

Not sure how to do something? Wondering if the RIMS Web Editor software supports a certain function? Need a graphic? Never forget that RIMS staff is looking forward to helping you achieve your vision for your chapter's Web site. Contact RIMS at 212.655.6041 or send an e-mail to [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).

So, enjoy the experience and let your creative juices flow.