The purpose of the ASHRAE TC website is twofold: to support and update the TC membership and to inform outside audiences about the TC's contributions in ASHRAE. The new website has been designed to simplify the management process performed by the webmaster. Besides a more simplified structure, many of the sections are automatically loaded either by the program or by ASHRAE staff. For example, minutes and agenda will load automatically to the appropriate sections, if file naming conventions and file locations are adhered to. TC Rosters will be loaded by ASHRAE staff, as will information about future winter and annual conferences.

Primary activities of the webmaster will involve editing - using a basic built-in text editor; uploading of documents – minutes, agenda, etc.; and where needed, linking documents to appropriate areas on the webpage. While most of these actions will appear fairly intuitive, this document has been developed as a reference guide.

The basic structure of the website consists of the following five webpages, though additional pages may be added at the discretion of the webmaster:
- Home
- Membership
- Meetings
- Documents
- Functions

Each webpage consists of two types of areas: editable regions under the control of the webmaster and fixed regions managed by ASHRAE staff. (Please report any errors in the fixed regions to ASHRAE Staff.) When logged into the site, editable areas will be designated with a pencil icon. When a webpage has been edited, the changes must be saved before moving to another page. When the saving process is "publish", the page will become live on the website.

Once the initial set-up is complete, website management is minimized to uploading meeting documents (minutes, agendas, and others); inserting information about the upcoming TC meeting dates, times, and locations; and other updates as needed.   Of course, any additional information or customization by the webmaster will enhance the website experience for all visitors and serve as a great advertisement to draw in potential members and share the contributions of the TC to outside audiences.

Please note: there is no "members only" section of the website. Anything published will appear to all website visitors. A separate product is under review by the Electronic Communications Committee (ECC) to support members-only activities by the TC.

Quick Links (Ctl + click)

Login	File Types	Saving Changes	Custom Menu
Forgot Password	File Naming	Membership	Links
Page descriptions	Convention	Meetings	
Editing	Upload Files	Documents	
Main Editing Page	Minutes and Agendas	Create Page	

ASHRAE Technical Committee Website
Webmaster Instructions
K Cooper 20150922

1. Login (back to top)
   1.1. Open the website in your browser
   1.2. At the end of the text at the bottom of the page (footer) you will find a "Login" link
   1.3. After clicking this link you will need to enter the email address and password that you have been given by ASHRAE staff.
   1.4. When you click the login button, you will be taken to the "Sites" page described next

2. Forgotten Password (back to top)

   2.1. Reset it by selecting "**Forgot your password?**" from the login page.

   2.2. Further instructions will be emailed to you. If you don't receive an email after a few minutes, please check your junk folder

3. Page Descriptions (back to top)
   3.1. Sites page – this is the main page for accessing the editable webpages and the folders which contain documents.
   3.2. Home page – this is the main landing page for a visitor to the TC's website.
   3.3. Membership page – membership information is automatically loaded by ASHRAE staff.
   3.4. Meetings page – this page allows input for additional information about meetings.
   3.5. Documents page – contains links for visitors to download minutes and other documents developed by the TC.
   3.6. Functions page - This page provides an area to describe the activities and responsibilities of the TC such as a list of the TC's standards, handbook chapters, on-going research projects, lists of research final reports, recent or upcoming program sessions, lists of MTG's which TC participates on, FAQs managed by the TCs, etc.
   3.7. Custom page – this is an optional page which can be customized to meet the TC's needs.

4. Sites page – this page controls where you can go and contains links to the various pages and files
   4.1. Manage files (back to top)
      4.1.1. This opens a fixed window that has several important items
         4.1.1.1. The shortcuts in the upper left will take you directly to folders that are unique to your TC only. The most important one is the "Documents" shortcut – this is where you will upload the TC minutes and supporting documents.
         4.1.1.2. The Home button takes you back to the root of the site files, so if you are deeper in the site structure, eg: root/documents/agenda, clicking the home link will take you to /root.
         4.1.1.3. Supporting information like a separate sign-in sheet for the meeting or separate minutes or other information for one or more of your subcommittees are also put into the "meeting-information" folder so that they will appear on the documents page along with the main committee minutes.
   4.1.1.4. If the document is not to be shown on the documents page, but is to be linked to another place in the website, put the file in the "documents" folder. The subfolders "research" and "programs" can also be used to store files as desired.
      4.1.2. File types – any recognized file type can be used (ex: PDF, DOC, DOCX, XLS, XLSX) (back to top)
         4.1.2.1. **The PDF file type is preferred for text** since it cannot be altered by most people. Alternately, you could password protect other file types before posting.
      4.1.3. File Naming Convention – It is **CRITICAL** that ALL files uploaded have certain information built into the FILENAME because these key words are used to automatically populate various items in the website described below. If the filename received omits one or more of these items, the **webmaster MUST** insert them as required. (back to top)
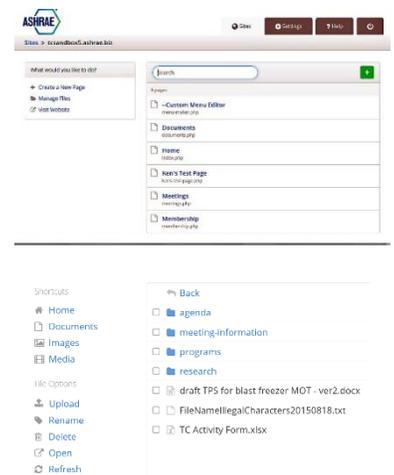
4.1.3.1.   Committee designation – the committee TC number in "TC0709" format must appear FIRST in the file name – no spaces, no punctuation, 4 digit file name

4.1.3.2.   Minutes of meetings – the word "Minutes" must appear in the file name

4.1.3.3.   If Agenda – the word "Agenda" must appear in the file name

4.1.3.4.   Additional descriptors can be added to the filename for clarification. If the filename already contains the appropriate key words, you don't have to add it a second time.

4.1.3.5.   Date of meeting – the date in "YYYYMMDD" format must appear LAST in **ALL** file names, not just the minutes and agenda. **This is the only date allowed**.

4.1.3.6.   Examples
    4.1.3.6.1.   "TC0709 draft Minutes Atlanta 20150628.pdf"
    4.1.3.6.2.   "TC0109 research subcommittee Minutes Atlanta 20150627.doc"
    4.1.3.6.3.   "TC0709 Sign In sheet main committee Atlanta 20150628.pdf"
    4.1.3.6.4.   "TC0709 Agenda Atlanta 20150628.docx"
    4.1.3.6.5.   "TC1005 draft RTAR Freezing Stuff 20141231.txt"
    4.1.3.6.6.   "TC0104 Draft Minutes 2015-06 Atlanta 20150628.pdf" THIS IS NOT ALLOWED because there are two references to the year.
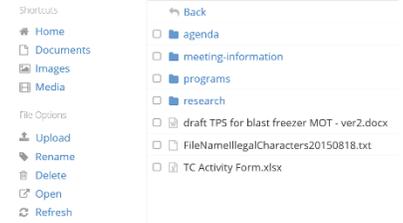
4.1.4. Minutes and Agendas (back to top)
    4.1.4.1.   Be sure to follow the naming conventions above – exactly as described so that the home page will be populated correctly.
    4.1.4.2.   The agenda for the next meeting is uploaded to the folder "agenda". Be sure you are in the "agenda" folder before uploading.
        4.1.4.2.1.   Remove old agendas from the folder so that they do not show on the home page.
    4.1.4.3.   The draft and final minutes for the main committee meeting are uploaded to the "meeting-information" folder. Be sure you are in the "meeting-information" folder before uploading.
    4.1.4.4.

4.1.5. Upload Files
    4.1.5.1.   Navigate to the folder you want to save the file in.
    4.1.5.2.   Click on the "upload" word in 'manage files'
    4.1.5.3.   This will open a window to your computer. Navigate to where your file is stored
    4.1.5.4.   Select the file and click "open. The file will be uploaded to the folder you are in.
    4.1.5.5.   You may view a file that has been uploaded by selecting it and clicking on "open"
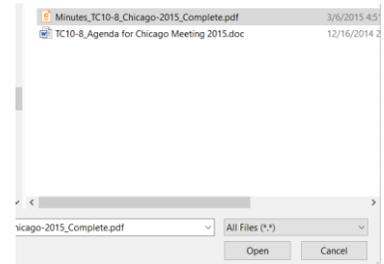
4.2. Visit Website
    4.2.1. Clicking this link will take you to the TC website in a new tab but not logged in

4.3. "Sites" icon – top center of the window.
    4.3.1. This link will bring you back to this 'sites' pages when you are finished updating them and have 'Published' the page.

4.4. Settings - do not change anything in this section
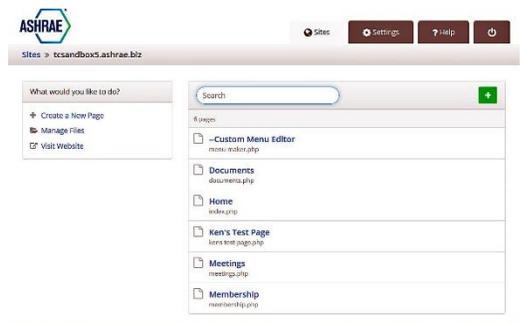
5.   Editable Regions (back to top)
    5.1. You can only change areas on any website page if you see an icon that looks like a 'pencil' next to it. Otherwise the information will be placed there automatically.

5.2. On each page, you will find "tips" to help you maintain the page.

5.3. Areas which do not have a pencil icon will not be editable by the webmaster. These areas are maintained by ASHRAE staff. If changes are needed or there are errors in these areas , please contact the Manager of Research and Technical Services (MORTS)

6. Editing text boxes

6.1. When you click on a 'pencil' or into an editable region, standard editing features will be enabled at the top of the window. These include most common editing items such as font actions, linking (chain icon in center), images, media insert and tables.

6.2. You can copy and paste text from another source into a text box, however, copying from MS Word is not recommended because there can be problems with embedded control characters. It is recommended that you first copy text from MS Word into a text editor (Notepad, Notepad++) that will strip these characters, then 'recopy' from the text editor into the website text box.

7. Saving changes (back to top)

7.1. There are three options for saving your work when you click on the "save" button in the top right of the window

7.1.1. "Save Draft" – this allows you to save your work when it is not yet ready for publication so that you can come back and finish it in another session

7.1.2. "Auto-publish…" – this allows you to delay the publication of the page until a future time when it will be automatically updated

7.1.3. "Publish" – this immediately makes the page live with no delay

7.1.4. "Cancel" – this will erase any changes you might have made to the page and take you back to the "sites" page

8. Home page

8.1. Click on the "Home" page link in the center of the 'sites' window.

8.2. The first thing you note is that you do NOT link the agenda for an upcoming meeting on this page. You put the agenda file (properly named of course) in the "agenda" folder.

8.3. Everything in the rightmost column is contained in the 'configuration file' or other documents maintained by ASHRAE staff and any errors should be reported. You cannot change anything here.

8.4. Upcoming TC meetings – here you MUST insert whatever scheduling or other information is necessary to announce date, time, and place of upcoming meetings. This is just a text box and when you click inside it you can start typing or pasting or whatever you want to do. (for example, you can copy the TC meeting schedule complete from the ASHRAE meetings schedule and just paste it into this box – no typing necessary and you have the dates, times and meeting rooms)

8.5. Minutes – this information is automatically linked from the files (properly named) you have inserted into the "minutes" folder. You cannot change anything here. If you do not see the information on the website (when not logged in) the first thing is to check to be sure the file is named properly.

8.6. Other Information – the last text box at the bottom of the center column is where you can put any additional information, announcements, photos, links to other places you want.

8.6.1. For example, you could put information about an ongoing research project, announce a project for bid or a standard open for public review or any special committee activity that you want to highlight. It can be a 'current events' area.

9. Pre-footer link (at the bottom of the page just above the "footer" text)
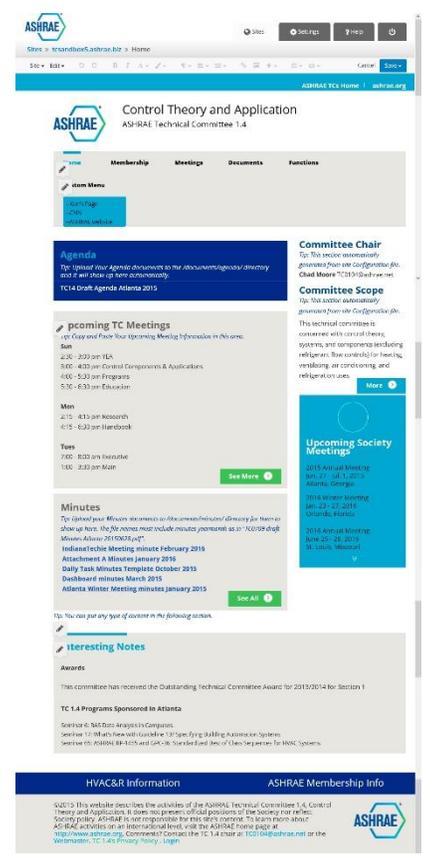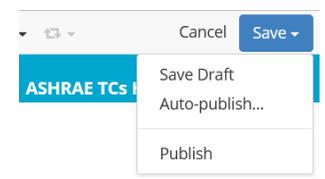
9.1. The information in this area has been set to 2 nominal links (HVAC&R Information and ASHRAE Membership Info). It is changeable if there is something special that the TC wishes to replace it with.

10. Membership page (back to top)

10.1. There is a 'notes' section at the top where you can put any descriptive information about the membership you wish. You may also leave it blank if desired.

10.2. The membership roster is automatically generated by ASHRAE staff and is ordered alphabetically by Officers, Voting Members, Corresponding Members and Provisional Corresponding Members. It is based on the "official" TC roster for the current Society year and should agree with the roster distributed by the TC Chair.

10.3. The "Join TC" link will take you to the ASHRAE website where application for Provisional Corresponding Member can be made.

11. Meetings page(back to top)

11.1. There will be some general information about meetings and attendance. You are allowed to modify this information provided any changes conform to ASHRAE rules and practice.

11.2. The first 'pencil' in the center column allows you to change the title of the information

11.3. The second 'pencil' is where you put whatever information you would like to be publically available for normal or special TC committee/subcommittee/web calls, etc you need to have.

12. Documents page (back to top)

12.1. At the top you will see the "meeting minutes" section with 'accordion' sections that correspond to the Society year (July 1 – June 30). You CANNOT modify this section. All minutes MUST be put into the proper folder AND properly named (see section 2.1). They will be automatically inserted into the proper year.

12.2. The first 'pencil' allows you to change the Title of the following section (shown as 'whitepapers'). You can call it anything you want, including leaving it blank if you do not want it to show on the page.

12.3. The second 'pencil' allows you to add any text you want to describe what follows

12.4. The next 'pencil' is where you can add 'accordions' to highlight specific information and put text or links in each accordion section.

12.4.1. Adding and moving an accordion

12.4.1.1. Click on the section title (the thing with the 'down carrots')

12.4.1.2. On the editing menu at the top of the window is an icon that looks like a 'square with arrows'

12.4.1.3. When you click on this icon you will see several choices that are self-evident.

12.4.1.4. Once you have inserted a new accordion you will see that it is a copy of the section you started with however since both the title and text are editable, you can replace everything with the new information.

12.4.2. To delete an entire accordion, click on the one to delete then click on the 'square with arrows' and select "delete"
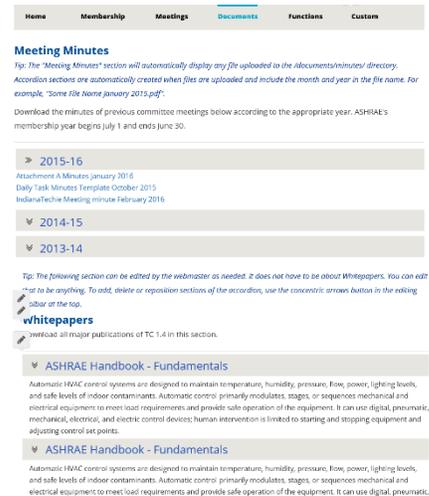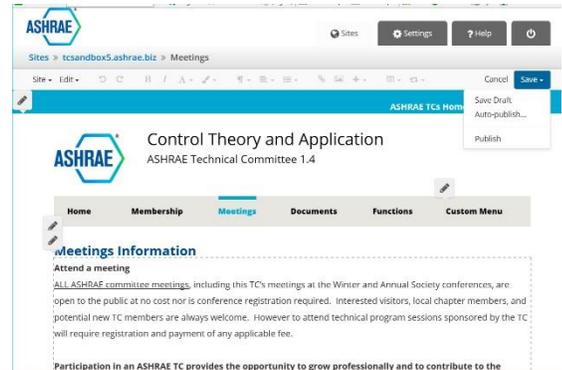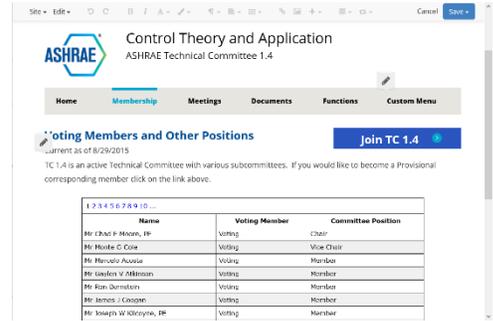
13. Functions page

13.1. This page provides an area to describe the activities and responsibilities of the TC, such as a list of the TC's standards, handbook chapters, on-going research projects, lists of research final reports, recent or upcoming program sessions, lists of MTG's which TC participates on, FAQs managed by the TCs, etc.

13.2. It is edited the same as the bottom portion of the "documents" page above.

14. Create a New Page (back to top)

14.1. Click on the "create a new page" on the 'sites' screen

14.2. Fill in the information required in the pop up window. Note the instructions. As you fill in the 'Label", the file name will be automatically generated.

14.3. Click on 'submit' and a blank page will appear on the 'sites' page

14.4. Edit content on this new page as described above.

15. Custom Menu Item(s) (back to top)

15.1. TC Webmasters may create their own Custom menu item, which appears at the end of the main menu, and hyperlink listed items to another page on the site or any other website.

15.2. Open the '—Custom Menu Editor' for editing and click on the top 'pencil'

15.2.1. To change the title for the custom menu page:

15.2.1.1. A text box will open where you can change what is displayed on the main menu

15.2.1.2. This text should be no more than two (2) words so that the main menu does not 'look funny'

15.2.1.3. Click "Submit" in the text box to save.

15.2.1.4. Click "Save" and select 'publish' on the 'home page edit' unless you are going to add links

15.3. Add text to be linked in the list below the title. Each should also be short but descriptive and be on their own line. This is what will be displayed on the dropdown in the main menu.

15.3.1. Add a link to another page, document or website using the "links" procedure for each line item.

15.4. When done, click 'save' and 'publish' to make the changes permanent.

15.5. You may remove the custom menu items by deleting them from the list.

16. Add links (back to top)

16.1. On any page where you can edit the text

16.2. Highlight the text you wish to have linked

16.3. Click on the "link" icon in the editing bar (chain like thing)

16.3.1. To add a page YOU HAVE ALREADY CREATED to the Custom Menu, find the 'php' file by clicking on the "folder icon" on the right.

16.3.2. To add a link to an external website, enter the complete URL for that site.

16.3.2.1. You probably want it to open in a new window – click the box.

16.3.3. To link a file in any text

16.3.3.1. If you have already uploaded it to a folder, you can select it for the link.

16.3.3.2. You can also upload the file using the file manager. Remember to select the 'documents, research or programs' folder before uploading. After upload, you can select it for the link.
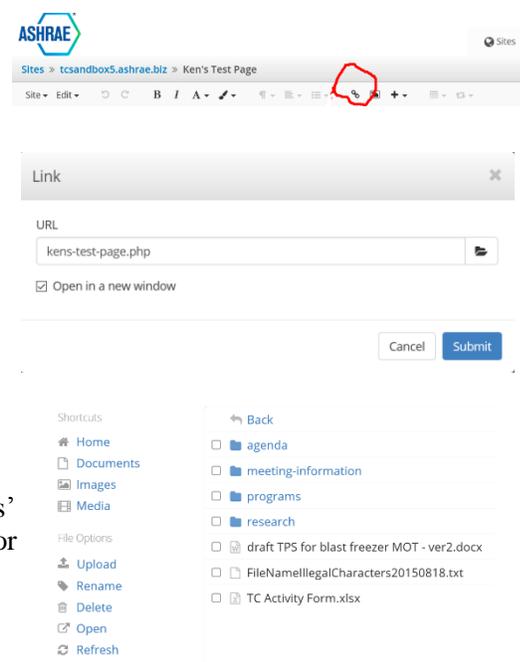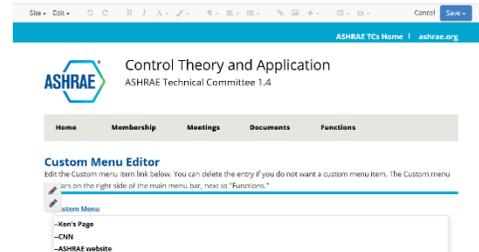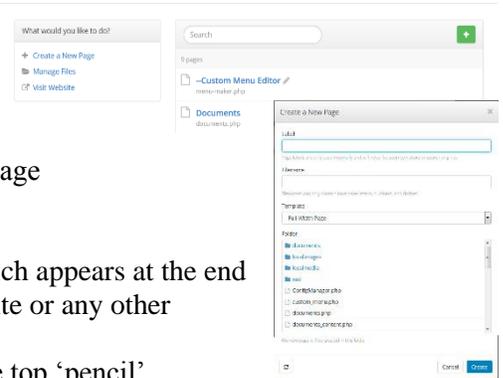
16.3.3.3.   Do NOT upload the file into the "meeting-information" folder unless you want it to be shown in the documents page.

16.3.3.4.   Always include a date in the file name so that it is easy to tell when it was added without having to open the file.

16.3.4. Click 'submit'