



[www.wellsfound.org](http://www.wellsfound.org)

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## User/Board Member Documentation

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*January 16, 2018*

*Version 1.5*

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## Document Revisions

Date	Version Number	Document Changes
June 26, 2017	1.0	Initial document
July 9, 2017	1.1	<ul style="list-style-type: none"> <li>• Two pages added to the website:               <ul style="list-style-type: none"> <li>○ Veterans Concert Prep Materials</li> <li>○ Website Documentation</li> </ul> </li> <li>• Names of pages appearing on the “Board Members (Private)” menu have been shortened and re-worded to be more understandable.</li> <li>• Made slight changes to verbiage and page spacing that were missed in version 1.0.</li> </ul>
August 1, 2017	1.2	<ul style="list-style-type: none"> <li>• Two pages added to the website. Both are under the “Board Members (Private)” menu.               <ul style="list-style-type: none"> <li>○ Materials Submitted by Applicants Requesting Grants in 2018</li> <li>○ Grants Documents 2010-2006 (Google Drive)</li> </ul> </li> <li>• One page removed since it is duplicated by the “Grants Documents ...” page noted above.</li> <li>• Screenshots and cross-references updated.</li> </ul>
October 18, 2017	1.3	<ul style="list-style-type: none"> <li>• Delete some material that is now redundant since it is documented on the website pages themselves.</li> <li>• Describe:               <ul style="list-style-type: none"> <li>○ The new "embedded spreadsheet" on the website page "Materials Submitted by Applicants Requesting Grants in 2018". This contains everything that was collected by organizations using the online application form introduced for the first time in 2017.</li> <li>○ An addition to the "2017 Site Visit ..." page to include links to reports organizations themselves have created which describe how they have used the funds Wells has provided.</li> <li>○ The addition of the online application form, though inactive until June 1, 2018, to the “Board Members (Private)” menu for to facilitate internal review.</li> </ul> </li> <li>• Remove obsolete screenshots.</li> <li>• Adjust colors of hyperlinks to reflect more typical web practice – i.e., blue for an “unvisited” link and purple for a “visited” link.</li> <li>• Remove references to WordPress at the bottom of website pages.</li> <li>• Clarify/tighten up verbiage in various spots.</li> </ul>
November 20, 2017	1.4	<ul style="list-style-type: none"> <li>• Shortened names of pages (and slightly re-ordered pages) on the “Board Members (Private)” menu to alleviate browser display problem.</li> </ul>
January 16, 2018	1.5	<ul style="list-style-type: none"> <li>• Updated changes to menus, page names, and page order</li> <li>• Deleted references to site map and home page video since these have been from the website itself</li> <li>• Added cross-reference to new technical documentation and, for that reason, added name to this document as “User/Board Member Documentation”</li> <li>• Made minor spelling and grammar changes</li> <li>• Fixed broken internal links</li> </ul>

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# 1 Board member website access “101”

## 1.1 Purpose of this documentation

The initial issue of this documentation is designed to familiarize board members with some of the key features of the new website ([www.wellsfound.org](http://www.wellsfound.org)) that will enable them to do their work. The website itself has been developed using a contemporary application called WordPress. This product was chosen because it is:

- Open source – it has been developed by people who believe in sharing their computer skills and using those skills to constantly improve the product.
- Free-of-charge for the base product (although website hosting and certain plugins – defined below – do involve fees).
- Easy both to develop and maintain.
- Able to be deployed with very little experience in traditional HTML-based website development.
- Very popular<sup>1</sup> within the web development community. This means, among other things, there are thousands of sources of information on WordPress – ranging from online training for individuals at all skill levels to blogging sites that offer solutions for specific customer needs.

The new site has been created using only WordPress-compatible enhancement software applications (called “plugins”). There is no custom coding. Anything displayed on the website *that does not use WordPress and plugins has been developed using standard software*. For example, the video showing the history of the Wells Foundation was developed with Microsoft PowerPoint and is stored on a YouTube site.

## 1.2 Future enhancements and documentation efforts

In the months ahead, this documentation will be updated as changes are made to the website. Suggestions for corrections, improvements, additions et al for both the website and the accompanying documentation should be forwarded to [wellsfoundweb@gmail.com](mailto:wellsfoundweb@gmail.com).

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<sup>1</sup> Although these numbers are inherently imprecise one blogging site estimates that WordPress has been used to develop over 50% of the world’s websites. <https://websitesetup.org/popular-cms/>

### 1.3 Technical documentation

This document has been given the name **User/Board Member Documentation** to distinguish it from a new, separate document entitled **Technical Documentation Including URLs, User IDs, Passwords**. Both are stored under the passworded menu “Board Members (Private)”.

This new document includes, among other things, detail about all the “under-the-hood” such as theme/child theme choice, plugins used, hosting provider accounts/user IDs/passwords (AUPs), cPanel AUPs, WordPress administrator AUPs, domain registrar AUPs, and the process for making database changes.

### 1.4 Structure of the Wells website

The contents of the public-facing menus sub-menu pages for “About Us”, “Grants”, “Administration”, “News”, “Donate”, and “Contact Us” are self-explanatory. **Therefore, the focus here will be to briefly describe some key points in the passworded selections under the “Board Members (Private)” submenu.**

Website menus, pages, and the names of those menus and pages will periodically be updated as discussed below. Here the term **“updated” includes such things as changes or corrections to content, re-ordering of pages in the menu, renaming of pages or menus, and the like.** What is described herein is current as of January 16, 2018.

### 1.5 Board Members (Private) – Menu Items

#### 1.5.1 Login Instructions

Explanation of:

- What materials are under this “private” menu and why.
- Conventions for accessing them via password.
- Caveats about browser behavior.

#### 1.5.2 Board Member Login

The first time you log in you will see this screen. Board members will receive a user ID and password from the Administrator in advance of first logging in. Note:

- This is the screen to access for a password reset.
- The “Remember Me” checkbox *may not work* if your *browser settings override* this function.

**BOARD LOGIN**  
**Username or Email**  
  
**Password**  
  
 Remember Me  
  
[Forgot Password?](#)

### 1.5.3 Contact Information

Includes name, term/officer/committee status, phone number and email address.

### 1.5.4 2018 Grant Applicant Submissions

This page contains an embedded spreadsheet along with detailed “Webmaster Comments” explaining in detail how to use and interpret the content therein. The spreadsheet holds everything that was collected by organizations using the online application form introduced for the first time in 2017.

### 1.5.5 2018 Applicant Acceptance and Rejection Letters

This includes (a) individual Word copies of the various letters and (b) two separate PDF files that “bind” together all the acceptance and rejection letters, respectively.

### 1.5.6 Meeting Minutes 2012 to present

All available minutes for official Wells Board meetings during this period have been posted. These are in PDF format.

### 1.5.7 Grant Recipients Summary 2015-2018

A table showing organizations receiving grants during this period.

### 1.5.8 Google Drive Documents 2010-2016

This page was added on August 1, 2017. It provides direct access from the website to the “historical” Google Drive documents related to grant cycles from 2010 to 2016. The page includes extensive questions and answers about content and navigation.

### 1.5.9 Site Visit/Recipient Reports

Originally, the description for this page was: *“As board members complete visits to sites and write up their findings those documents are posted here”*. An additional column on the far right was added on October 18, 2017 providing links to reports organizations themselves have created which describe how they have used the funds Wells has provided.

### 1.5.10 Site Visit Templates

Microsoft Word templates that can be completed after site visits are conducted.

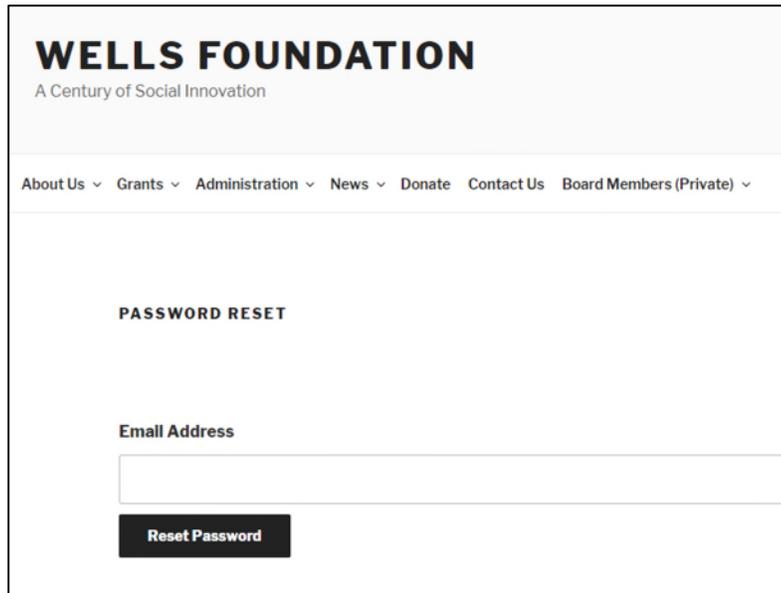
### 1.5.11 Grants Applicant page (inactive until June 2018)

This page — along with its embedded online application form — is what grant-seeking organizations visited between June 1 and October 1 of 2017. It is “inactive” now but is included under this menu so that any board member who has not seen it previously can better understand this critical piece of the website functionality.

### 1.5.12 Password Reset

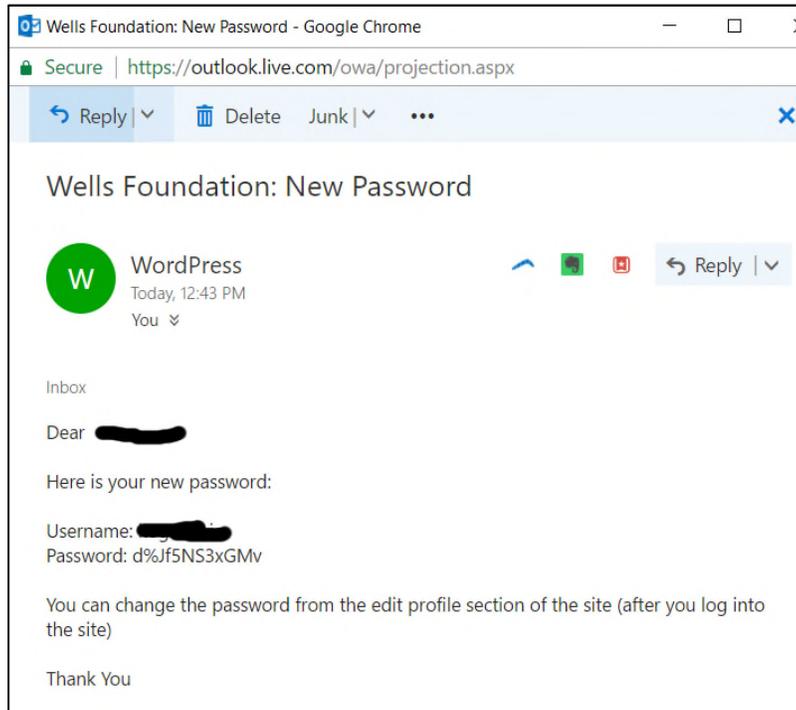
The password reset involves these steps:

- a) Go to the “Password Reset” page (shown in the following screenshot) and complete the email address.

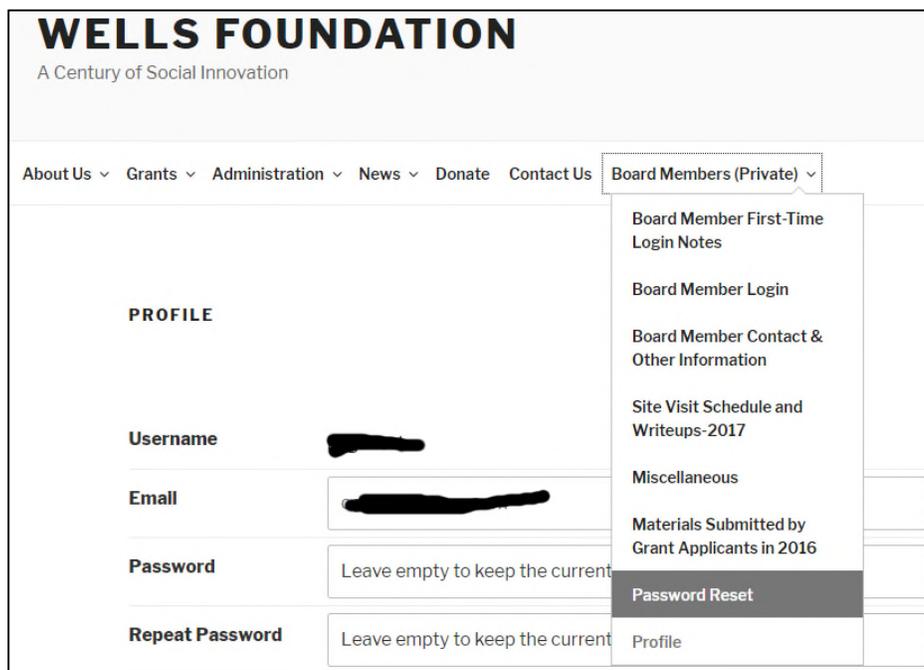


The screenshot shows the Wells Foundation website's password reset page. At the top, the logo reads "WELLS FOUNDATION" with the tagline "A Century of Social Innovation" below it. A navigation menu includes "About Us", "Grants", "Administration", "News", "Donate", "Contact Us", and "Board Members (Private)". The main content area is titled "PASSWORD RESET" and features a form with an "Email Address" label and a text input field. Below the input field is a black button labeled "Reset Password".

b) Review and act upon the email coming out of the step described above.



c) Reset the password (optional). NOTE: there are additional fields below "Repeat Password" but these do not have to be completed.



### 1.5.13 Profile

Same screen as shown above. It exists only to show the (skeletal) information carried on board members. It is also an **alternative way to change a password when you know it** (i.e., it skips the email notification mentioned above in section 1.5.12).

### 1.5.14 Veterans Concert Prep Materials

This page stores documents that have been used in the past for publicity and other activities related to the annual “Honoring Our Veterans” concert.

### 1.5.15 Website Documentation

This page contains a link to PDF format copy of the website documentation.

## 2 How grant applicant organizations will use the website

### 2.1 Navigating to the “Apply for a grant” page

Organizations applying for Wells Foundation grants will go to the website and navigate **Grants > Applying for Grants**.

### 2.2 The grant application form itself and accompanying instructions

When they arrive on the page highlighted above applicants will see a page containing instructions for applying online including time periods for applying, documents that need to be uploaded, mandatory vs. optional fields etc. **DURING the July 1 to October 1 grant period a paragraph like the following will appear:**

Application Procedures

The Wells Board accepts applications from organizations beginning July 1 and running through October 1 of each year. During this period use the online application that will appear at the bottom of this page. We will acknowledge receipt of the application immediately and follow up within you within three weeks.

**OUTSIDE OF the grant period a different paragraph like the one below will appear.** Note that during this period there is a link to a PDF image of the form.

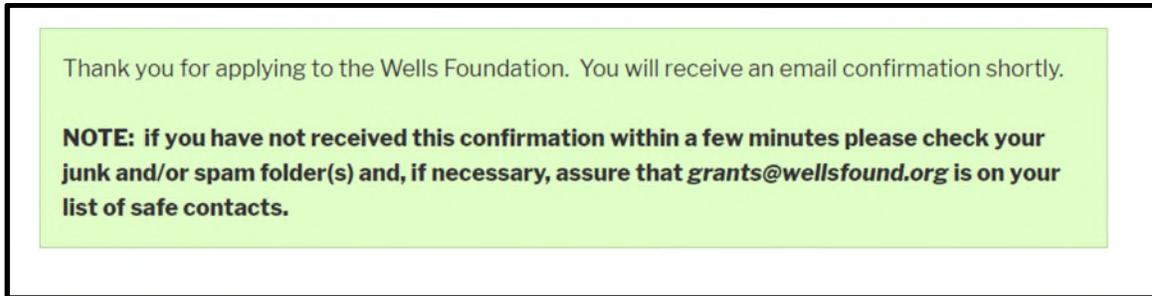
Application Procedures

The Wells Board accepts applications from organizations beginning July 1 and running through October 1 of each year. **During these 3 months an online application form will appear at the bottom of this page along with specific instructions for its completion.** We will acknowledge receipt of the application immediately and follow up within you within three weeks. [Click here to view the application form](#) that will appear during the application period.

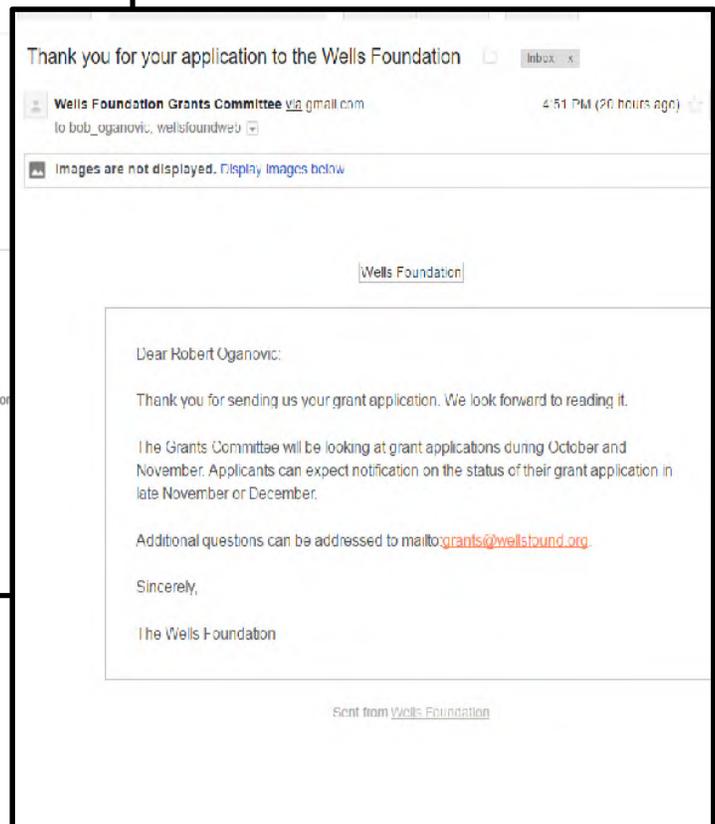
Technically there are **two separate pages that are manually “swapped” in and out** to reflect these differences according to the beginning and end of the grant application period. This is a straightforward (albeit manual) procedure in WordPress.

## 2.3 Feedback to the applicant

Immediately after hitting “Submit” **the applicant sees a message on the web page similar to the following** (note the junk mail warning).



**A confirmation email is simultaneously forwarded to the applicant (below left) and grants committee and webmaster (below right).** The content of the message and determination of the recipients are configured within the WPForms plugin.

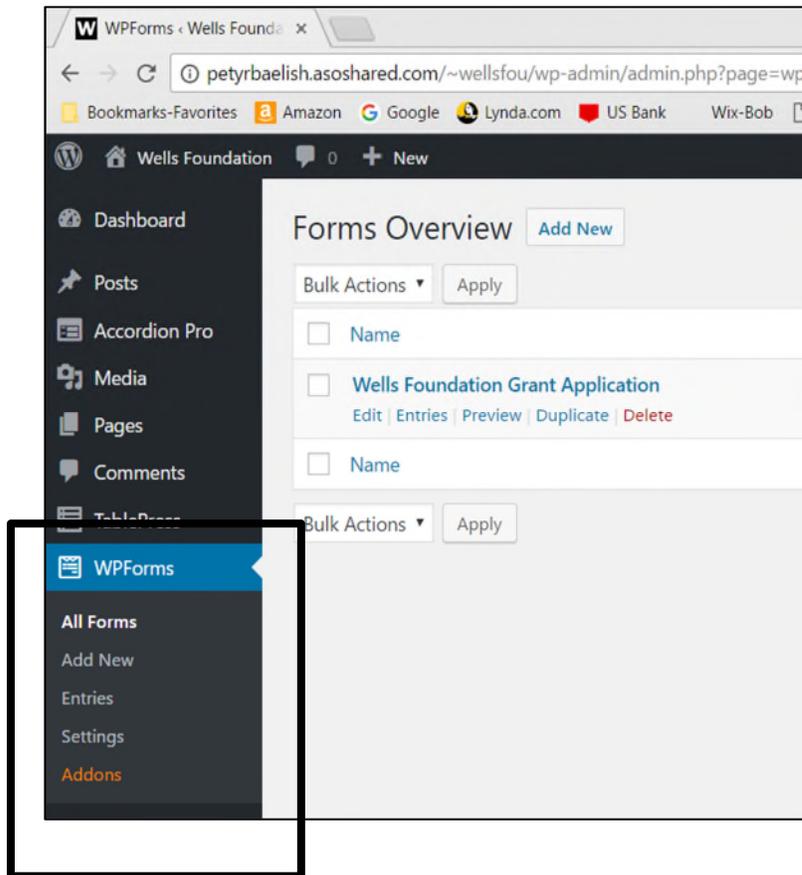


### 3 “Under the hood” – behavior of the applicant form

#### 3.1 The view from the website “Administrator”

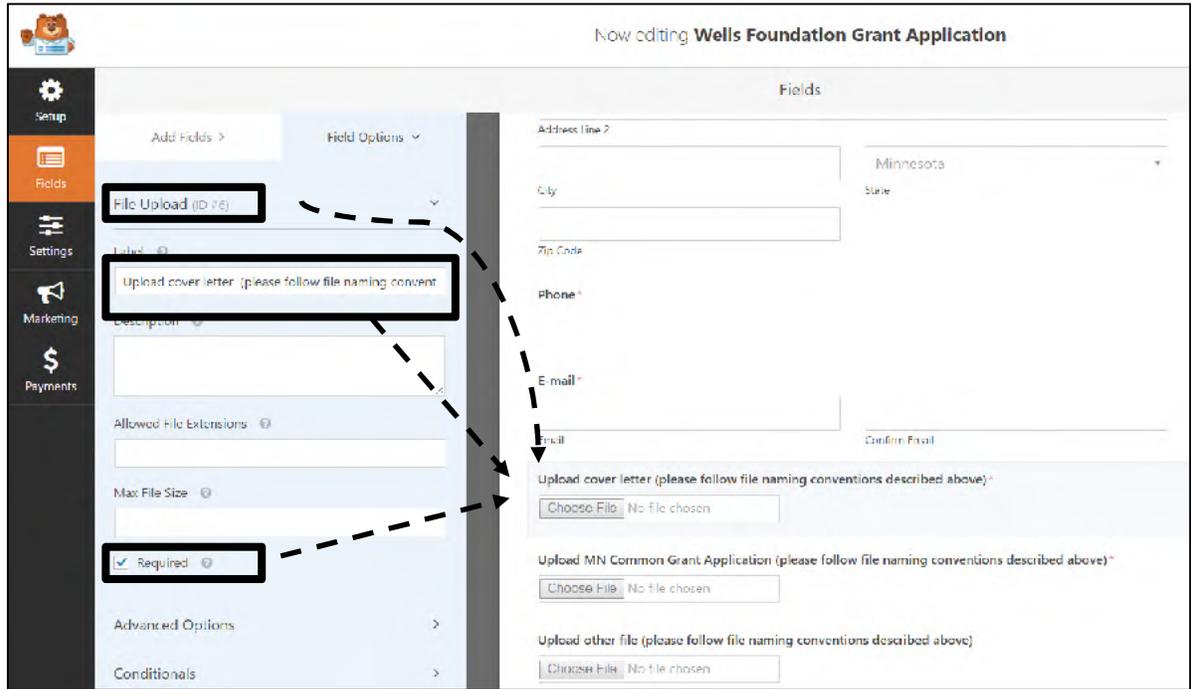
A partial screenshot of the Administrator’s configuration page is shown below. As noted earlier:

- The form will be visible to applicant organizations only during the July to October 1 grant period.
- Removing the form and -- in the following year -- re-instating it are manual but simple procedures in WordPress.



### 3.2 Additional detail and choices around the form

Within the WPForms plugin you can drill down into the form configuration screen. Here you define how you want each data field to behave. This can be tailored further in the future should new needs arise. Shown below is how the Administrator can configure the field on the form that permits the applicant to upload their cover letter



### 3.3 New email domains

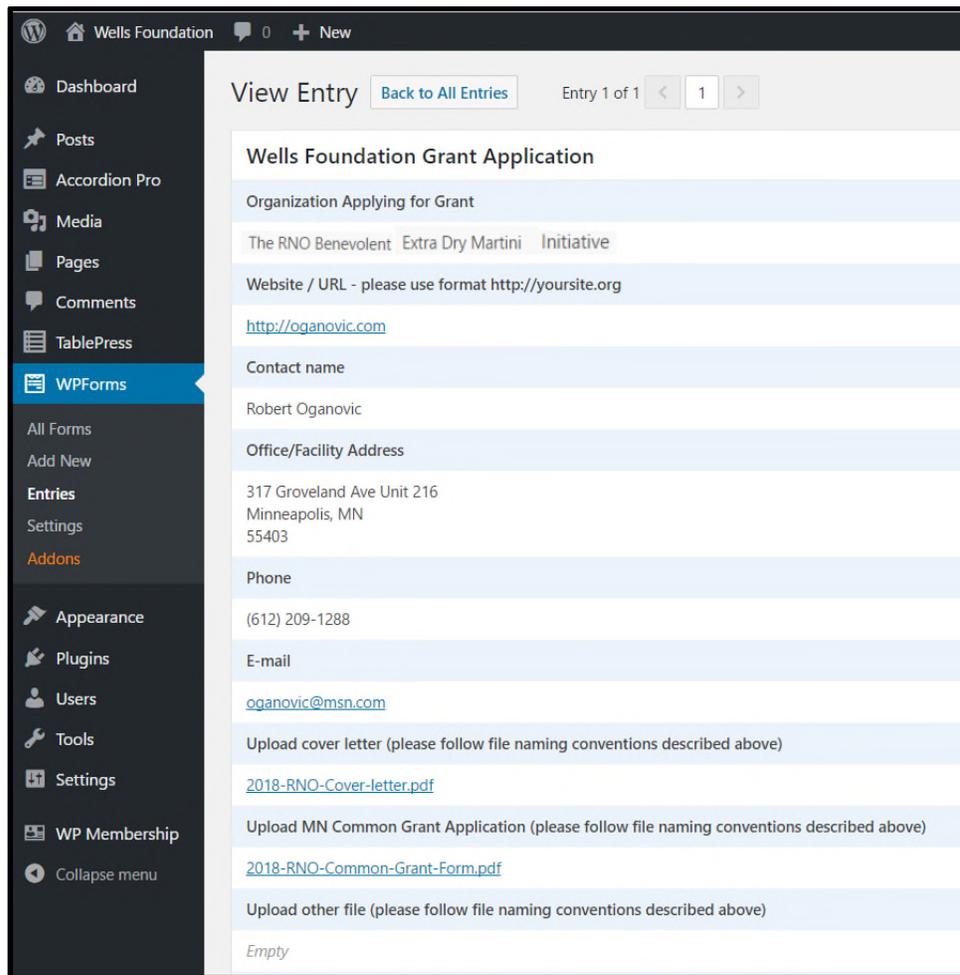
Going forward there will be no email addresses using the [\\_\\_\\_\\_@wellsfound.org](mailto:____@wellsfound.org) domain. These will be replaced by Gmail accounts. The content of the two active email accounts with this domain have been transferred to [wellsfoundgrants@gmail.com](mailto:wellsfoundgrants@gmail.com) and [wellsfoundpres@gmail.com](mailto:wellsfoundpres@gmail.com). A new website-centric account ([wellsfoundweb@gmail.com](mailto:wellsfoundweb@gmail.com)) has also been established.

Mail messages sent to the old [\\_\\_\\_\\_@wellsfound.org](mailto:____@wellsfound.org) addresses receive an auto-response telling the sender to re-send their message to the new corresponding [\\_\\_\\_\\_@gmail.com](mailto:____@gmail.com) address.

## 4 Applicant information collected and available on the website

### 4.1 Content visible to Wells Board Members

A profile (below) is immediately created when the applicant submits the online application (the WPForms plugin refers to this page as the “Entries” page). Everything the applicant entered on the online form and uploaded appears on this profile.



The screenshot shows the WPForms 'View Entry' page for a 'Wells Foundation Grant Application'. The page is titled 'View Entry' and includes a 'Back to All Entries' button and a pagination indicator 'Entry 1 of 1'. The application details are as follows:

Field	Value
Organization Applying for Grant	The RNO Benevolent Extra Dry Martini Initiative
Website / URL - please use format http://yoursite.org	<a href="http://oganovic.com">http://oganovic.com</a>
Contact name	Robert Oganovic
Office/Facility Address	317 Groveland Ave Unit 216 Minneapolis, MN 55403
Phone	(612) 209-1288
E-mail	<a href="mailto:oganovic@msn.com">oganovic@msn.com</a>
Upload cover letter (please follow file naming conventions described above)	<a href="#">2018-RNO-Cover-letter.pdf</a>
Upload MN Common Grant Application (please follow file naming conventions described above)	<a href="#">2018-RNO-Common-Grant-Form.pdf</a>
Upload other file (please follow file naming conventions described above)	Empty

Beginning with the 2017 grant cycle there is an additional page added to the “Board Members (Private)” menu that replicates the content of this page for all applicant organization in a spreadsheet (see next page).

This approach will permit both Grant Committee members and other Board Members to easily review in one spot whatever the applicants have submitted. The can also cross-reference other related content on the website such as prior year applications and site visit writeups described elsewhere in this documentation.

[About Us](#) ▾ [Grants](#) ▾ [Administration](#) ▾ [News](#) ▾ [Donate](#) [Contact Us](#) [Board Members \(Private\)](#) ▾ [Site Map](#)

## Applications for grants to be awarded in January 2018

	A	B	C	D	E	
	Organization Applying for Grant	Website / URL - please use format http://yoursite.org	Contact name	Office/Facility Address	Phone	E-mail
1	African Chamber of Commerce	[REDACTED]	ib Martin [REDACTED]	2751 Hennepin Ave. S. Suite 142 Minneapolis, MN 55408	(612) [REDACTED]	[REDACTED]@gmail.com
2	[REDACTED] Housing Inc.	[REDACTED]	o Barbara [REDACTED]	Alliance Housing Inc. 2309 Nicollet Ave Minneapolis, MN 55404	(612) [REDACTED] 3	[REDACTED]@ncehousing.org
3	[REDACTED] Technology [REDACTED]	[REDACTED]	e Carol [REDACTED]	5563 Pioneer Creek Drive Suite A Maple Plain, MN 55359	(763) [REDACTED]	[REDACTED]@e.org
4						

2017-10-03 applicants for 2018

[Download \[28.49 KB\]](#)

#### 4.2 Links in the profile to relevant information

The spreadsheet contains basic information about the applicant organization along with:

- *External* links to the applicant email address and the organization’s website and ...
- ... *Internal* links to content (i.e., the uploaded documents) stored within the website (an area WordPress calls the “Media Library”).

Clicking on these links opens the documents within the browser as shown on the next page.

o-content/uploads/2017/05/2018-RNO-Cover-letter-592cba971fdbe.pdf

m US Bank Wix-Bob WP-Bob YouTube ASO Wells Admin ASO Wells Public IMSLP/Petru

1 / 1

[REDACTED]

October 1, 2016

[REDACTED]

President, Development Task Force, Grants Committee  
Wells Foundation  
5775 Wayzata Blvd., Suite 700  
St. Louis Park, MN 55416

Dear [REDACTED]

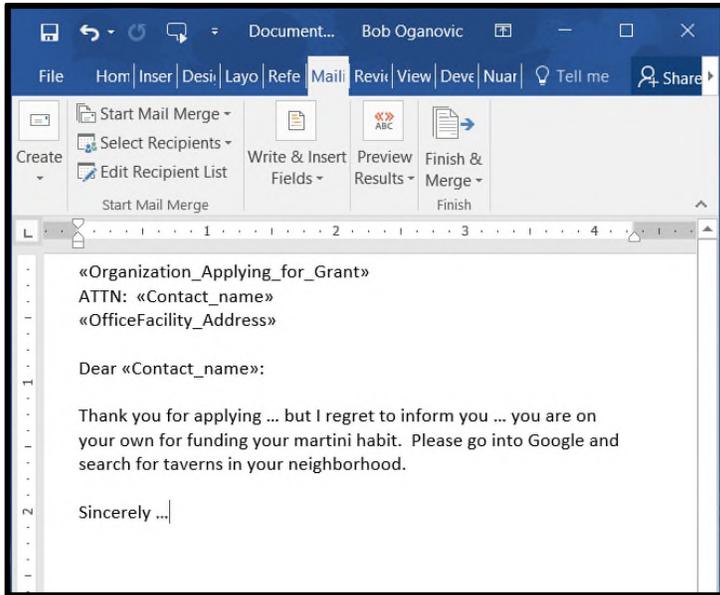
Thank you for the Wells Foundation's past generous support of [REDACTED] and the [REDACTED]. We invite you to continue the Foundation's tradition of philanthropy with a \$[REDACTED] grant to this unique, responsive, and outcomes-based program.

[REDACTED] meets the needs of sexually abused and exploited runaway youth, reaching young people who are often invisible, forgotten, or ignored by society. Our trauma-informed approach to care helps restore healthy developmental trajectories, promotes resiliency, minimizes risk-taking behaviors, and addresses complex family dynamics. The program serves as a national model for

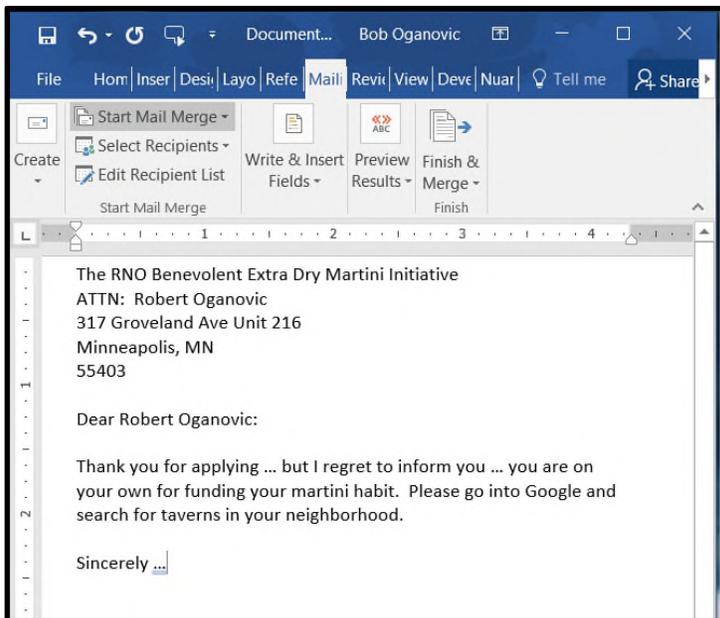
### 4.3 Leveraging the Entries page for other uses

There is a separate page in WPForms wherein data collected by applicant organizations can be exported into a comma separated value (CSV) format. This is a standard file convention which can be used to populate applicant-specific data in otherwise generic letters, mailing labels and the like using the Microsoft Word processing and email mail-merge capability.

Here is a sample template in MS Word that could be modeled for sending acceptance/rejection letters to applicant organization. The data field values that will come from the WPForms plugin page shown below are identified by the << >> marks.



Once these fields are populated the letter looks like this:



## 5 Changes to the website not mentioned elsewhere

### 5.1 Hyperlinks

The colors of hyperlinks have been adjusted to reflect more typical web practice – i.e., blue for an “unvisited” link and purple for a “visited” link.

### 5.2 Removing references to WordPress at the bottom of website pages

By default, the WordPress theme we are using indicates “Proudly Powered by WordPress”. This smacks of product placement and has been changed to include the copyright symbol, a date, and a reference to the Wells Foundation.

### 5.3 Items removed

#### 5.3.1 Sitemap (*removed January 16, 2018*)

The sitemap plugin and corresponding page has been removed:

- It was a free and sub-par plugin. The visual format of this page was poor.
- It had been placed on a public-facing menu. It was discovered that it displayed the names (although not the content of) the pages on the “Board Members (Private)” menu.

#### 5.3.2 Home page “About Us” video (*removed January 3, 2018*)

This has been replaced by a photos and captions embedded in a “slider” that is described in the technical documentation.