

# Board Sites

## Getting Started Guide

Welcome to the CU\*Answers Board Sites where you can connect your board members for meetings and other board activities. This document is intended for board site administrators. There is another document for board members. After reading this document, you'll be able to add your board members as users, add content for meetings and maintain a calendar of upcoming meetings on your board site.

## Quick Start for Board Site Administrators

This document will walk you through the first steps every credit union should take when setting up their new board site.

1. Logging In for the First Time  
see page 1
2. Updating Appearance  
see page 3
3. Editing the Calendar  
see page 4
4. Adding a PDF  
see page 4
5. Editing a Page  
see page 5
6. Adding a Board Member  
see page 6



[bod.cuanswers.com](https://bod.cuanswers.com)

# Board Sites

## Your New Site is Ready

Your Online Banking ID is used to create your unique address. For example, if your Online Banking ID is 087, your board site will be located here: <https://bod.cuanswers.com/087/>.

As the site administrator, you will receive an email inviting you to join the new board site as a Board Member Admin. You will also receive a second email with your username and password. Your password will be visible in this email. The first thing you should do is log into the board site and change your password on the Profile page.

You must activate your new account. Click the second link in the email to activate your account. You'll be taken to a page like this:

**Test Credit Union Board Site**  
Home Resources Calendar

**Log In**  
Your account is now active!

Username: kurthansen

Password: q12345678901234567890

☐ Remember Me

**Log In**

**Log In**  
Username

Password

**Log In**

## Logging In

You can log into your new site using the Log In form on the right side of the account activation page. When you log in you'll see a page like this:

**Test Credit Union Board Site**  
Home Resources Calendar

**The Pulse**  
CU\*Answers Disaster Recovery/Business Resumption Team to Host January's Education Express Webinar!

**Your Profile**

Name

Username: kurthansen Your username cannot be changed.

First Name

Last Name

Nickname (required): kurthansen

Display name publicly as: kurthansen

**Contact Info**

Welcome, kurthansen

Profile

Admin

Log Out

Search... **Search**

**Helpful Links**

Cooperative Score

ExamShare

This is the "Your Profile" page where you can make changes to your name, email address or password. Do not add information to the User Details section unless you are a board member. The User Details are for board members only.

Add your first and last names in the profile screen.

## Change Your Password

Scroll down and change your password the first time you log into the site. Your password must be at least 7 characters and should include upper & lower case letters along with numbers and symbols. A strong password is your defense against bad guys.

Support Email: [web\\_services@cuanswers.com](mailto:web_services@cuanswers.com)

Support Phone: 800.327.3478 x275

General phone support is available from 8:00 a.m. to 5:00 p.m. ET Monday through Friday.

# Board Sites

## Board Site Administration

Your board site has been created using the widely used WordPress website software. After logging into your site, you will be on the Your Profile page.

To enter the WordPress admin, click on the Admin link in the right sidebar.



WORDPRESS

Navigation for WordPress is down the left side of the screen. You should see the Dashboard page when you first enter WordPress admin.

## Did You Know?

Except for the content on the home page of your site, all other content can only be viewed by people who are logged into the site.

## URLs To Know

- The URL (address) of your site will be:  
<https://bod.cuanswers.com/XXX/> where XXX is your Online Banking ID. If your OBC ID is 087, the URL would be:  
<https://bod.cuanswer.com/087/>.
- If anyone forgets their password, they can use this URL:  
<https://bod.cuanswers.com/XXX/lostpassword/>.  
Don't forget to change XXX to your Online Banking ID.
- If anyone needs to change their profile (e.g., new email address, new last name, new title), they can use this URL:  
<https://bod.cuanswers.com/XXX/your-profile/>.  
Don't forget to change XXX to your OBC ID.



Look inside for more instructions

# Board Sites

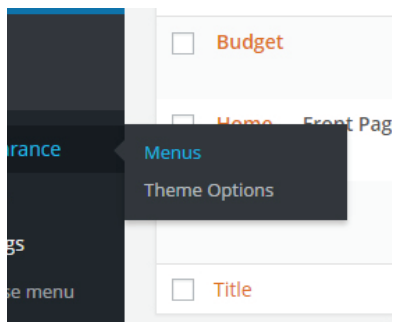
## Appearance

**Theme Options:** This option is found when you hover over the Appearance link on the WordPress sidebar.

**Changing the Colors on Your Board Site:** Click on the Select Color button. A color picker appears. You can drag the circle around to get the color you want. You can also click on the colored squares at the bottom to move the circle around. When you have a color you like, just click anywhere outside the color picker. Click the Save Options button to save your changes.

The primary color is used for the navigation bar, buttons and links. The secondary color is used for some of the headings on each page. The header, which is the area behind your logo, color can be set independently; the default color is gray.

Here's a screenshot of the color picker:

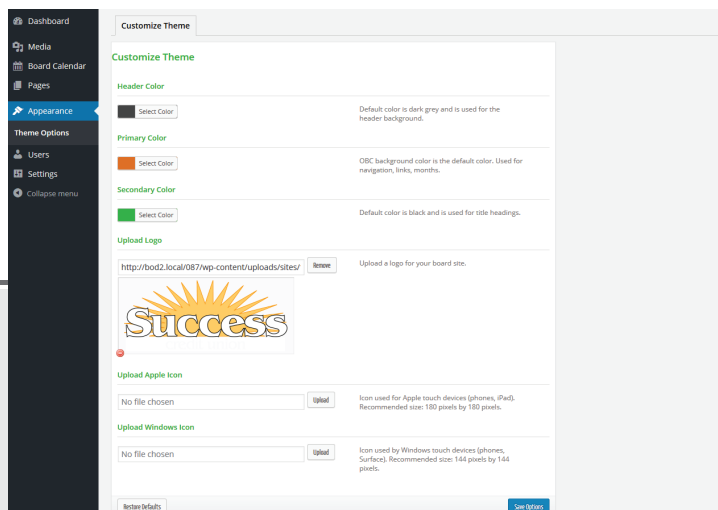
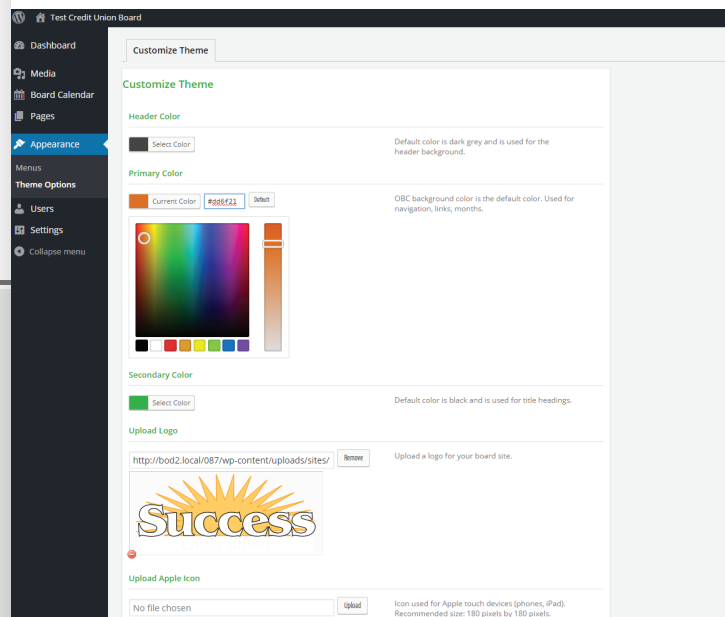


**Uploading a Logo:** You can upload your credit union logo to your board site. The logo should be one that looks good on a dark background or on your Online Banking primary color. A good size for your logo is 300 pixels wide by 125 pixels in height. Your logo should also be a transparent PNG. If your logo doesn't match these dimensions or you need it modified to work with a dark background, CU\*Answers Web Services can modify it.

Uploading a logo is very easy because the drag-n-drop interface is used here as well. Just click on the Upload button and the drag-n-drop screen appears. Drag your logo from your computer and drop it. Click on the Select button. Then click on the Save Options button.

The admin can also now upload an Apple icon and a Windows device icon. The default for either of these icons is the CU\*Answers Board Site icon.

Here's a screenshot after the header color, primary color, and the secondary color is set, a logo has been uploaded, and the Apple and Windows icons are editable:



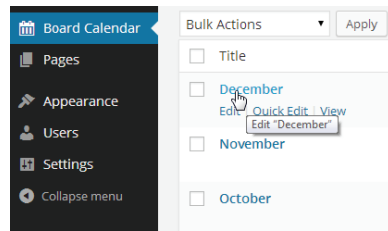


# Board Sites

## Board Calendar Page List

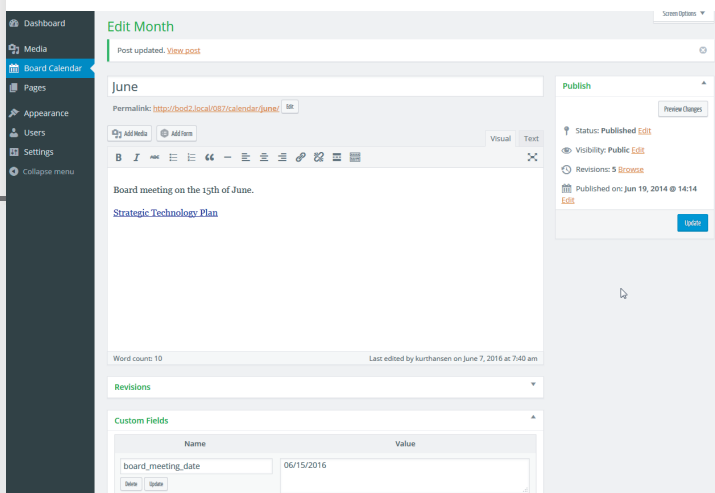
The Board Calendar page lists each month of the year. The calendar is rolling so there is one page for each month. It is not year-based so there's no January 2015, January 2016, etc. Use each page for the upcoming months. If you start your board website in July, start with July and work forward. You can remove the content in each month as you get further away. Remember, this is not an archive, but rather a planning calendar.

To edit a month, enter the Admin screen click Board Calendar and select the month you would like to edit.



If the custom field board\_meeting\_date is set in a Calendar month, the content for that month will be displayed on the Home page after logging in. If one month has a date set, all other months that the admin wants to appear on the Home page should have a date set. Setting a date is not required.

Here's a screenshot of the editing screen for a Board Calendar page:



## Edit a Month

Editing a month should be as easy as using Microsoft Word. In the content area of this page you can add your information and files to your post. When completed, click one of the following buttons:

**Preview Changes button:** This button is on the right-side, and allows you to preview any changes you've made in the editor prior to publishing the changes. Clicking it will open a new tab and display the page as if the changes have been published.

**Update button:** The Update button allows you to save your changes and publish them. If you already have a browser tab open, you may need to refresh your browser to see the changes you made.

PDF



## Adding PDFs

PDF files can be added to a month while editing the page by simply dragging a file from your computer into the content editing area in WordPress. You can also access previously uploaded items within the Media Library by clicking the Media link which is listed along the left side of the screen.

### Content Reminder:

1. No private data. While reasonably protected, the server hosting this site is not internally rated for private data.
2. No information that would hurt any business if it was exposed.
3. This site is not an archive. Board members are encouraged to securely archive documents on their own if they need them.

# Board Sites

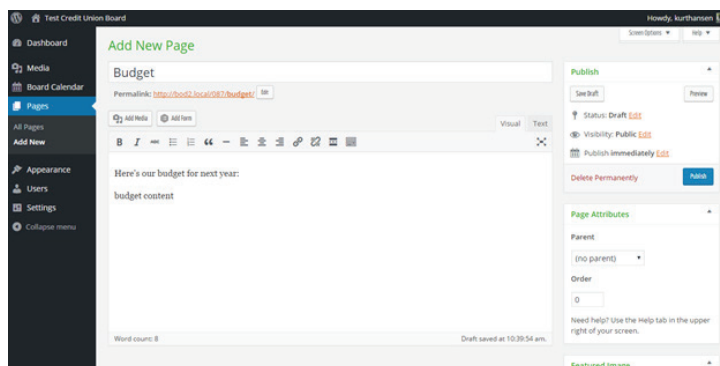
## Pages

The Pages navigation option in WordPress provides a listing of the pages on your website. There are two default pages, Home page and Resources. Board admins can add new pages by going to Pages in the WordPress admin navigation and clicking on Add New at the top of the page.

You'll want to edit the Home page and add any content you want to appear before the listing of board members. There is default content in the Home page so make sure you delete it or edit it. The Resources page is a place where you can provide information, links or files to your board members.

## Editing a Page

To edit a page, click on the page title listed. Making edits in WordPress is very similar to working with Microsoft Word, and the same functionality and tools exist that you use to edit a month on your calendar. (See page 4)



## Add a New Page

Add the new page to your menu by going to: Appearance => Menus. On the left is a list of pages that can be added to the menu. The menu is on the right side. Find the new page in the list of pages on the left, click on the checkbox next to the page name, and click on the Add to Menu button. The menu system is drag-n-drop. New pages are added to the bottom. Drag the new page to the correct place. If the new page is indented it will be a sub-page of the page above it. To save, click on the blue Save button on the right. Now go visit your board site and refresh your browser to see the new menu option.

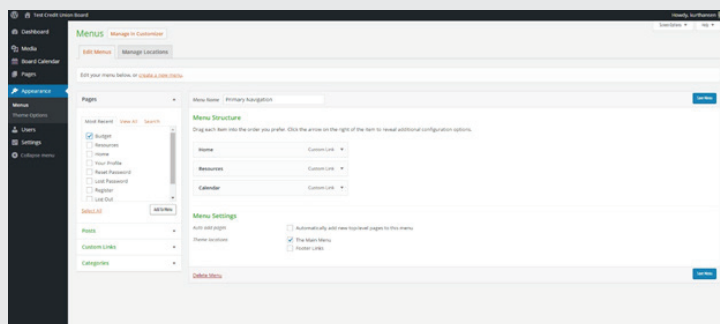
## Adding PDFs



PDF files can be added to a page while editing the page by simply dragging a file from your computer into the content editing area in WordPress. You can also access previously uploaded items within the Media Library by clicking the Media link which is listed along the left side of the screen.

### Content Reminder:

1. No private data. While reasonably protected, the server hosting this site is not internally rated for private data.
2. No information that would hurt any business if it was exposed.
3. This site is not an archive. Board members are encouraged to securely archive documents on their own if they need them.



# Board Sites

## Board Members Will Receive an Email

Before adding a board member, contact them via phone or email. Let them know that they will be receiving an email invitation to join the site. Advise them of the name of your board site and that they must click the link in the email to activate their account.

## Adding a New User

1. Go to Users in the WordPress admin.
2. Click on the Add New button at the top of the page.
3. Enter a user name using their first name and last name. For example, if you were adding Sally Smith, enter the user name as: sallysmith. Note that there are no capital letters and no spaces. If you have more than one user with the same name, use a middle initial. Another option is to set one as ssmith and the other as sallysmith. Last, you could add a number on the end like this: sallysmith1, sallysmith2.
4. Enter the user's email address.
5. You can assign new users as a Board Member, Board Member Admin, Board Committee Member or Auditor.
6. Click on the Add New User button.
7. If you receive any error messages, edit the fields as needed and click on the Add New User button a second time.

## Member Activation

After adding a new user, they will receive an email indicating they have been invited to join the site. The user must click the link in the email to activate the account. They will not appear as a user until the link is clicked.

After a board member has activated their account by clicking on the link, you can finish the process of adding a board member.

Finish adding a board member after his/her account is activated:

1. Go to Users in the WordPress admin.
2. Click on the board member's name in the list to edit it.
3. Scroll down to the bottom and update the board member information under User Details.
4. The Board Member Order sets the order of the board member listing if you don't want it to be alphabetical.
5. Check the Board Member Visible box if you want the board member to appear in any list on your board site.



**Only an admin can edit other users**



# Board Sites



**[bod.cuanswers.com](http://bod.cuanswers.com)**

**Support Email: [web\\_services@cuanswers.com](mailto:web_services@cuanswers.com)**

**Support Phone: 800.327.3478 x275**

General phone support is available from 8:00 a.m. to 5:00 p.m. ET Monday through Friday.