School Website Training – March 2025

Documents Masterclass

1 Introduction

Today will we look at Rally's **Documents** module. Organize your website by publishing a document category on a page, learn to replace a document without breaking links throughout your website, and discover the best practices for keeping your online documents organized.

1.1 WHY ADD DOCUMENTS TO YOUR WEBSITE?

Parents and students look for many types of Documents on your website. The Documents may be files such as PDFs, or online Documents such as Google Docs. School forms, newsletters, and student handbooks are just a few of the Documents visitors expect to find on your website.

1.2 TOUR OF A SCHOOL WEBSITE

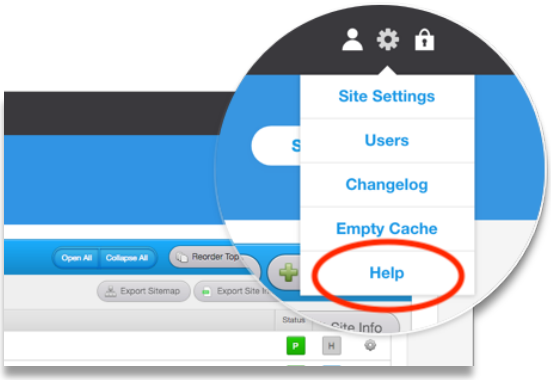
We'll start with a quick tour of a typical school website:

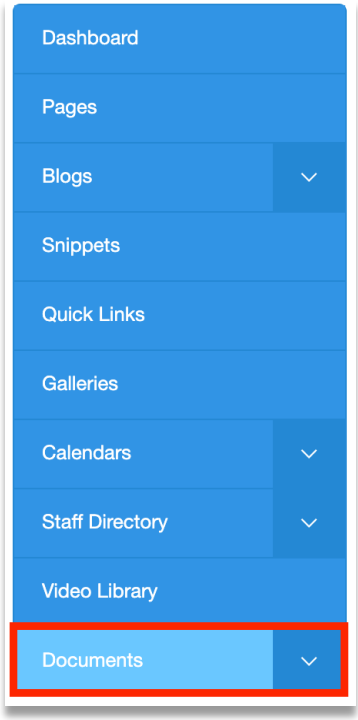
- The Documents Page is a searchable list of the public files on your website
- A category of Documents can be added to a Page
- Document links can be added to Pages, News Posts, and other parts of your website

1.3 TOUR OF THE RALLY SYSTEM

A tour of the Rally software where you update your school website content:

- Login page: add **/rally** to your school website URL
- Overview of the Documents module
- **Help section: contact us for support!**





2 The Document List

See which files are on your website on the **Documents** tab.

2.1 FILTER, SEARCH, AND SORT DOCUMENTS

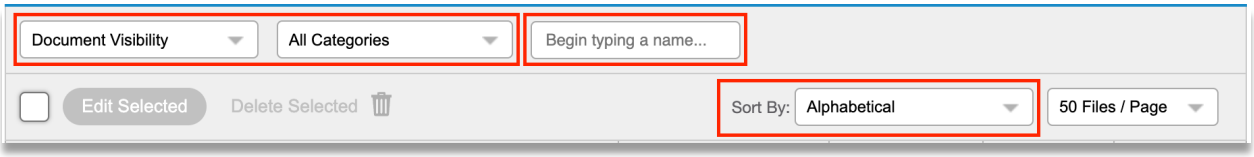
Filter your Document list according to:

- Visibility (is the document visible on your website's searchable Documents page?)
- Category

Search for a Document by typing its name.

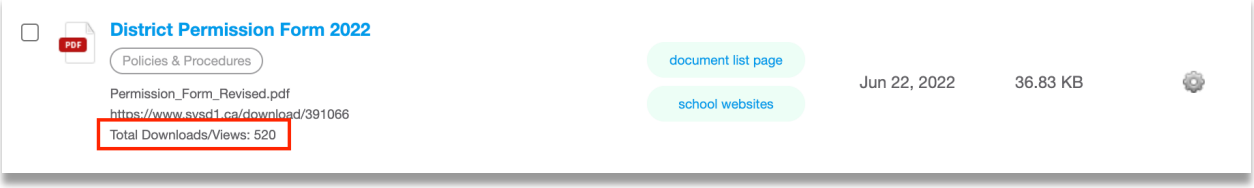
Sort using the dropdown menu. You can sort:

- Alphabetically by Document Title (this is the default)
- Relevance (only available when you use the Search function)
- Last Updated – Newest
- Last Updated – Oldest
- File Size



2.2 HOW OFTEN IS A DOCUMENT VIEWED?

The Total Downloads/Views statistic underneath each Document tells you how often people click that Document on your website!

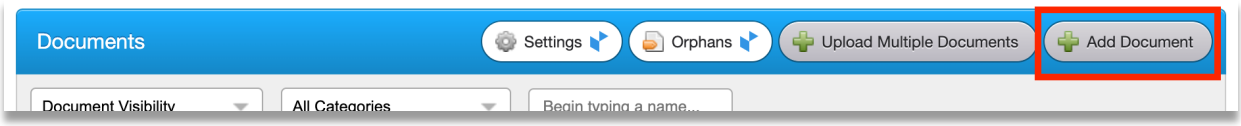


3 Adding Documents

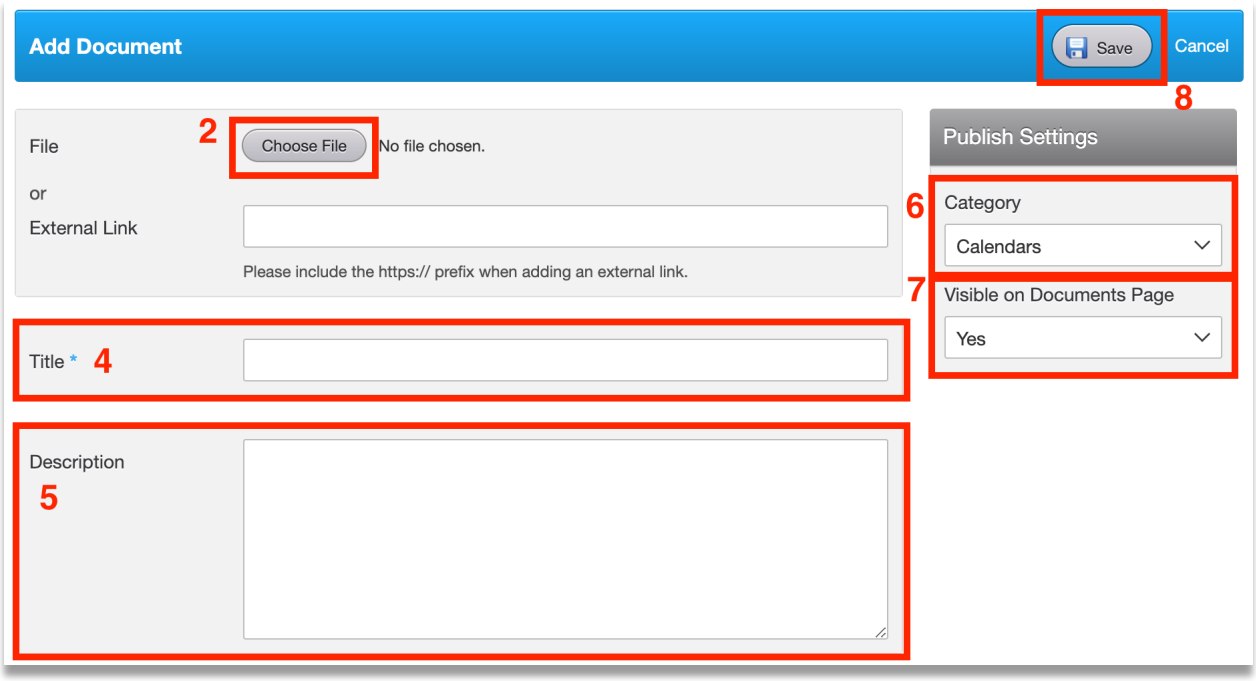
3.1 ADDING A FILE

Upload PDFs, Word Documents, PowerPoints, and other types of files on the **Documents** tab:

1. Click +Add Document



2. Click Choose File
3. Choose a file from your computer
4. Add a Title – it should be clear and easy for website visitors to understand
5. Add a Description to give your visitors more information about the Document (optional)
6. Choose a Category, or add a new one
7. "Visible on Documents Page" means your document can be found on the searchable public Documents page on your website. Select Yes or No.
8. Click Save

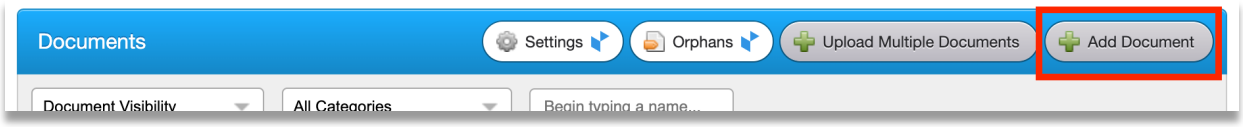


3.2 ADDING AN ONLINE DOCUMENT

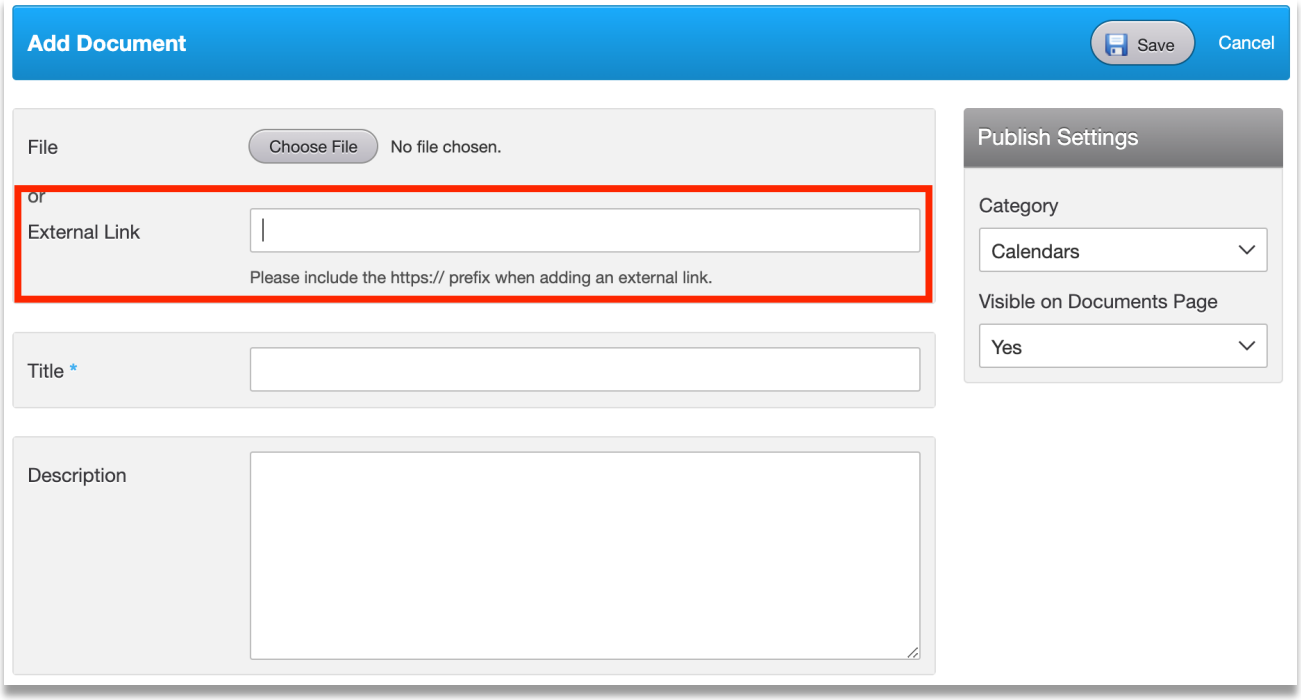
Online Documents such as Google Docs are increasingly popular. These Documents have a URL (a web address). They are not files that can be uploaded.

On the **Documents** tab:

- Click +Add Document



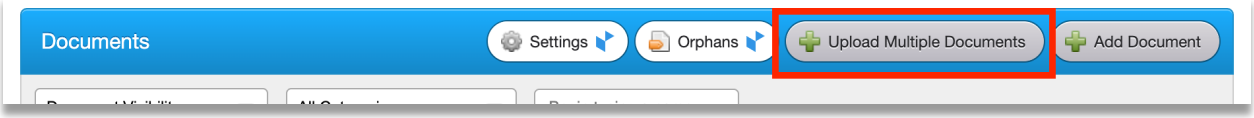
- Paste the URL for your online Document in the External Link field
- Enter the Document Title, Description (optional), Category, and Visibility
- Click Save



3.3 UPLOADING MULTIPLE DOCUMENTS

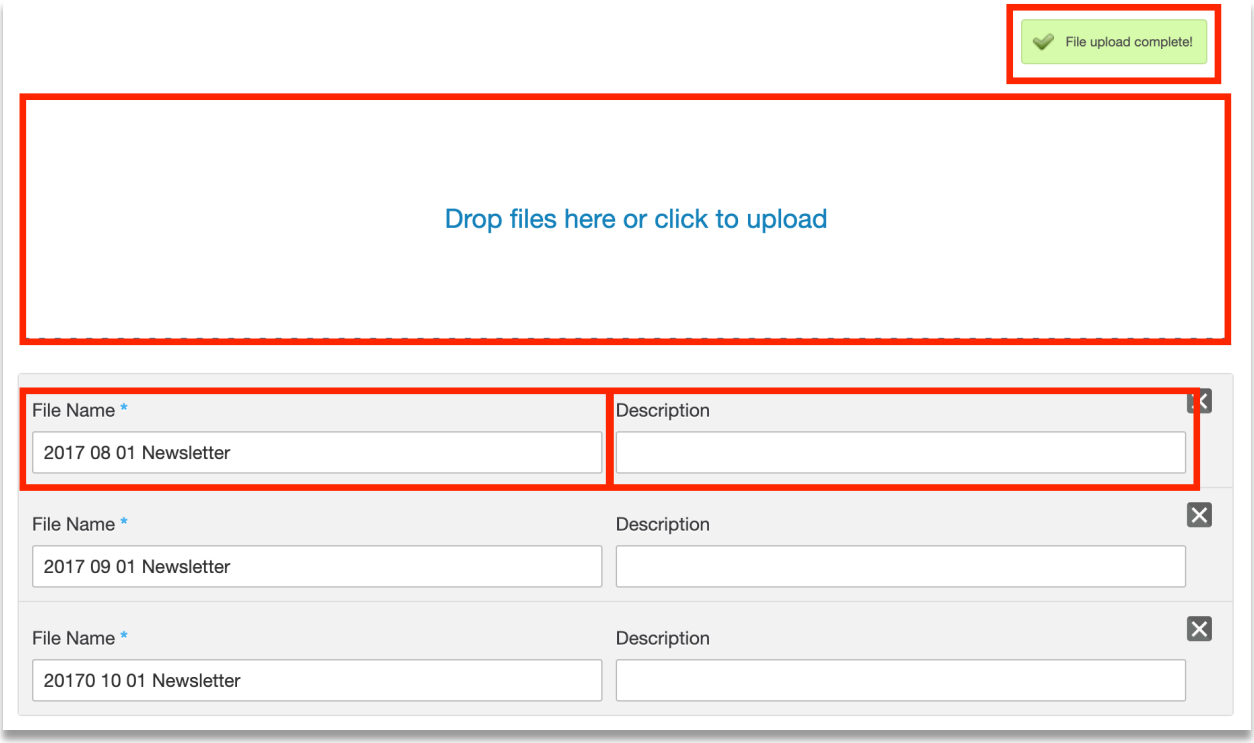
You can add multiple documents to your website at the same time. On the **Documents** tab:

- Click +Upload Multiple Documents



- Select the category you want all the documents to be added to
- Select if you want all the documents to be visible on the public documents page on your website

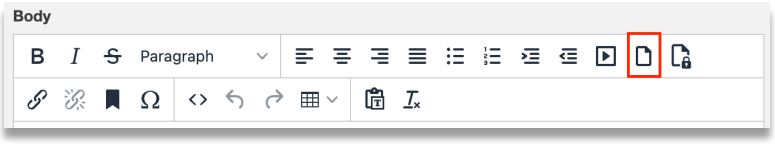
- Drag multiple files from your computer to the drop box in Rally (you can even drop a folder of Documents)
- Adjust the Title of each Document, if needed
- Add a Description for each Document, if needed
- Once all the files have uploaded (you'll get a green success message at the top of the list of files, click Save



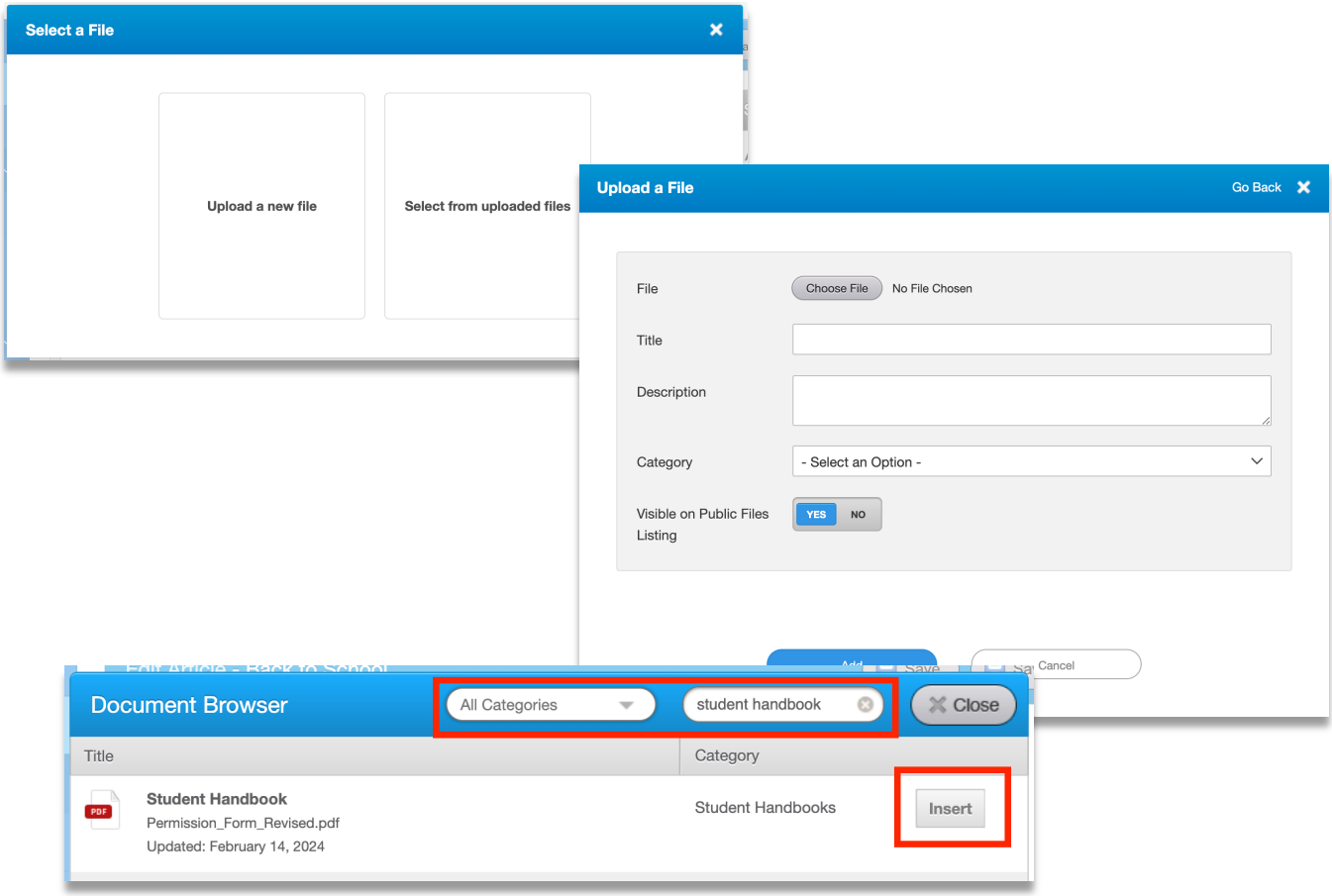
4 Document Links

4.1 ADDING A LINK TO A DOCUMENT

Add links to your Documents in any Article or Blog Post. Start by editing the body of the Article or Post (on the **Pages** or **Blogs** tab):



- Highlight the text you want to link to your document
- Click the Insert File tool in the toolbar
- Choose if you want to upload a brand new file or select from existing files in your Documents Module.
- If uploading a new file:
  - Fill out the necessary fields and click Add
  - As soon as you add it here, it will also be added into the list on the Documents tab
- If selecting from uploaded files:
  - Find your Document in the file browser and click Insert.
  - You can use the filters or search in the File Browser to help locate your Document.



4.2 LINK AN ENTICER OR QUICK LINK TO A DOCUMENT

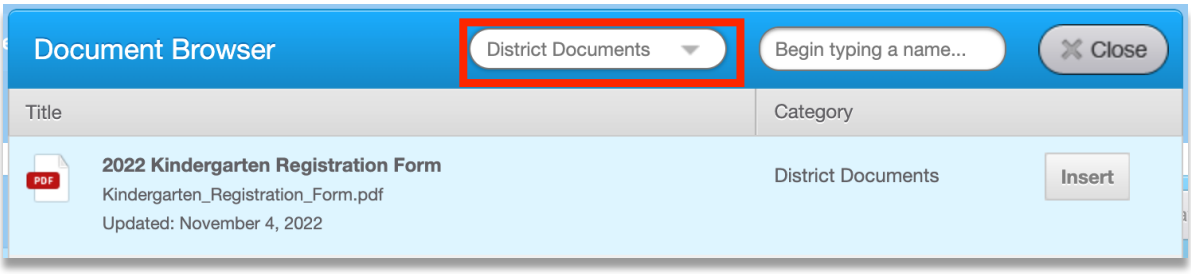
Enticers and Quick Links on your website can also be linked to a Document. Start by editing the Enticer or Quick Links (on the **Snippets** or **Quick Links** tab):

- Select File as the Link Type
- Click the yellow “file folder” icon to open the File Browser
- Find your Document in the file browser and click Insert

4.3 DISTRICT DOCUMENTS

Your school district can add Documents onto your website. This can be very handy when you want to make sure you link to the current version of a school district form or document!

In the File Browser, filter to the District Documents to see which Document have been added to your website by your school district.

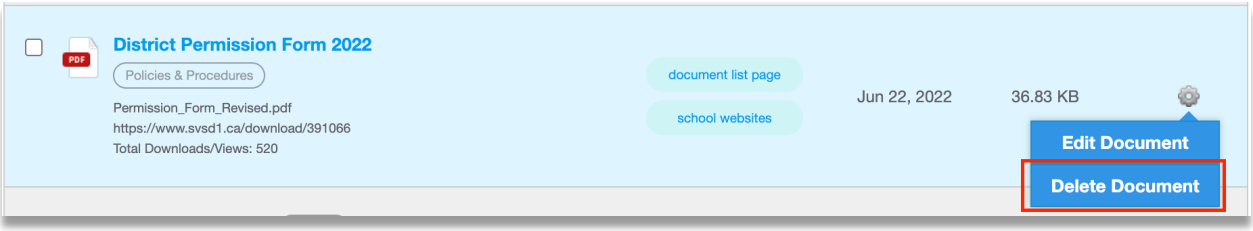


5 Deleting or Replacing Documents

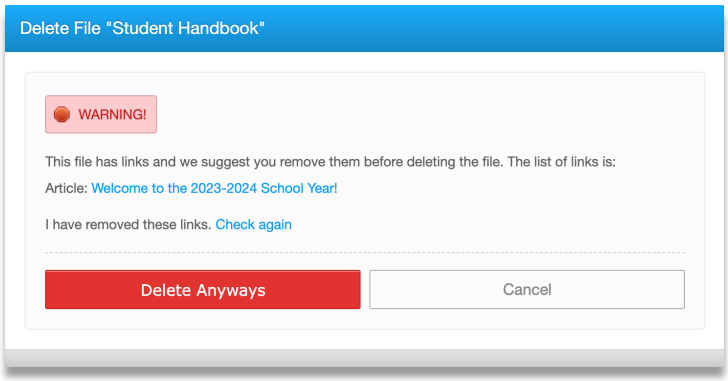
5.1 DELETING DOCUMENTS

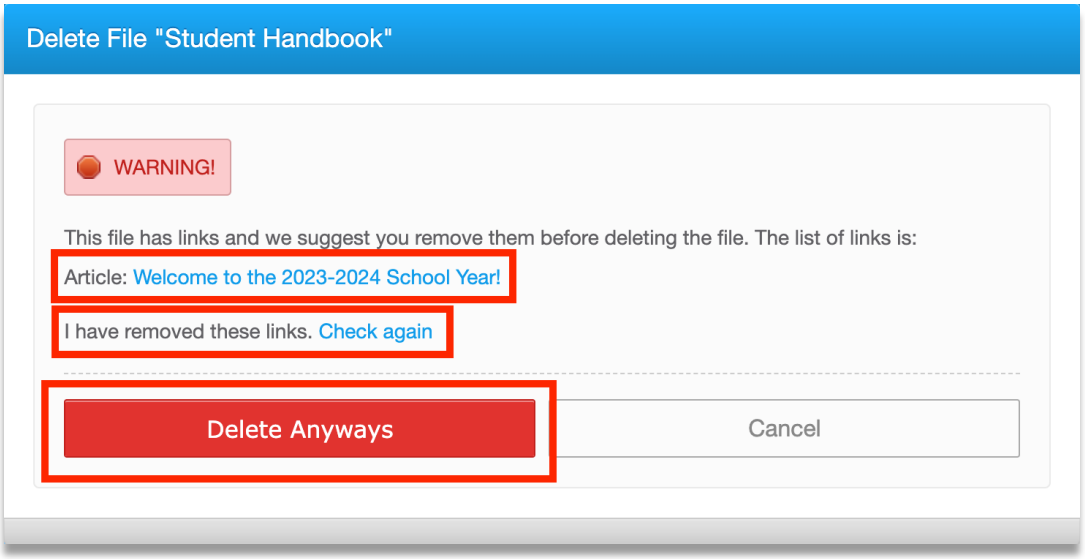
On the **Documents** tab:

- Find the document you want to delete
- Click the gear icon and click “Delete Document”



- If the document is linked in an Article, Blog Post, or something else on your website, you’ll receive a warning →
- Click on the blue text to navigate to the content that contains the link (the “Article: Welcome to the 2023-2024 School Year!” link in the example below)
- Remove (or update) the link and save your changes
- Come back to the document page and click “Check Again” to double check the link was successfully removed
- Once successful, click “Delete”



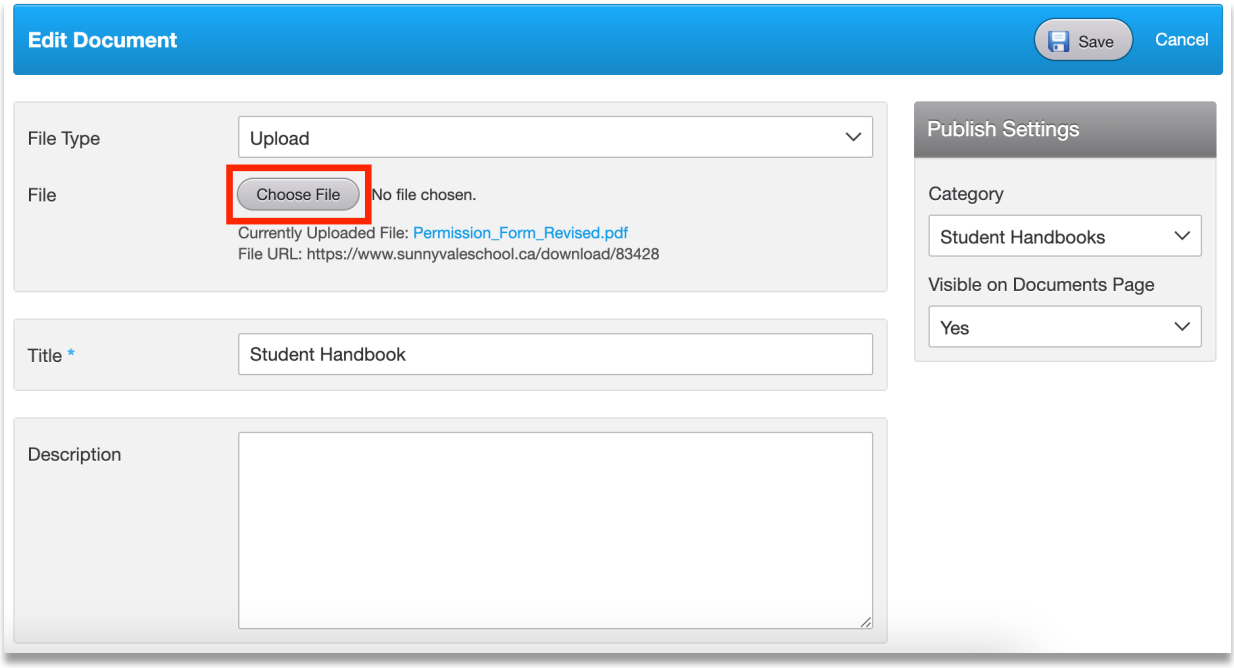


5.2 UPDATE (REPLACE) A DOCUMENT

When you have a new version of a document, don't delete the old version! Instead, you can *replace* the old version. This means any links you have created to the document will instantly point to the new version!

On the **Documents** tab:

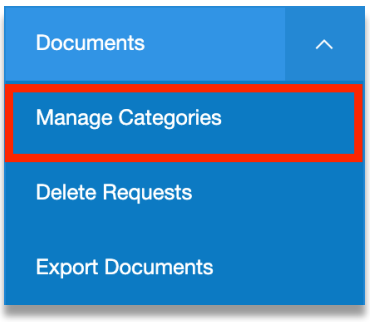
- Find the Document you need to update and click on its Title
- Choose the new file from your computer OR add the updated Document URL
- Click Save



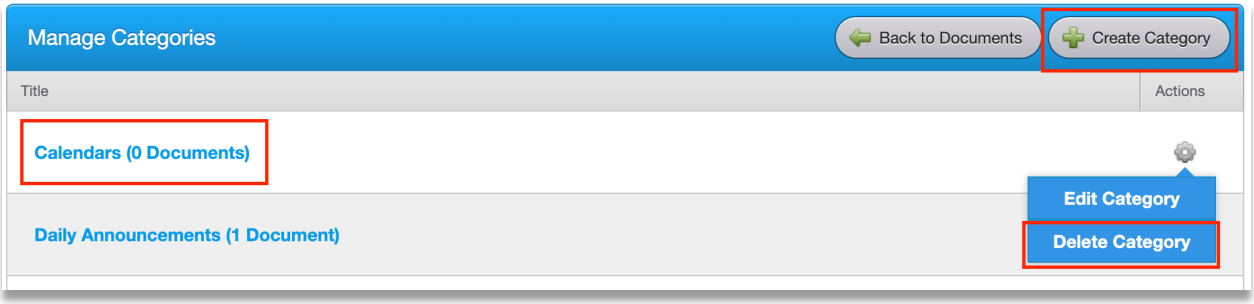
6 Managing Categories

6.1 ADD OR EDIT A CATEGORY NAME

Under the **Documents** tab, click the **Manage Categories** tab:



- Click +Create Category to add a brand-new Category
- Click the name of a Category to edit its name
- You can delete a Category *only* if there are no Documents in that Category



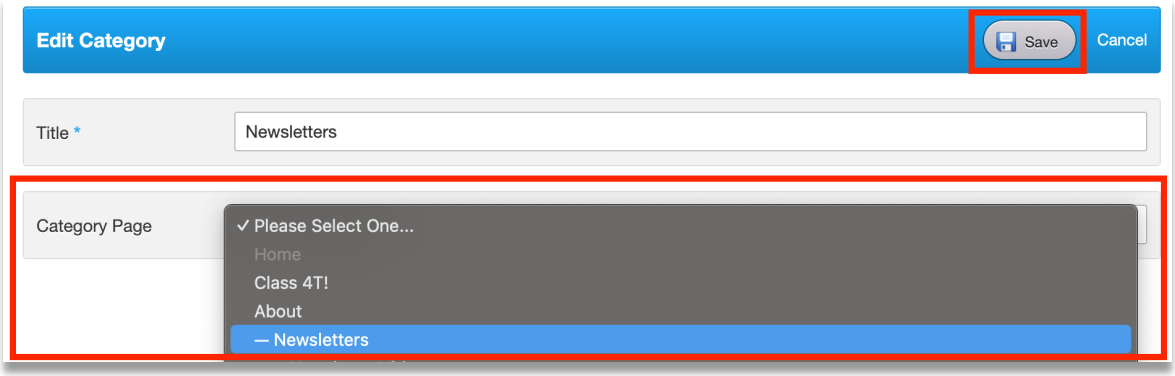
6.2 ATTACH A CATEGORY TO A PAGE

Add an entire Document Category to a page on your website!

For example, if you add a PDF newsletter to your website every month, attach your “Newsletters” Document Category to a Page on your website called “Newsletters”. Your Newsletters will automatically appear on that Page.

On the **Manage Categories** tab:

- Click on the Category that you want to attach to a Page
- In the “Category Page” drop down, select the Page
- Click Save



7 Document Management & Clean-Up

It's good practice to review your website documents once or twice per year and delete anything you no longer need.

7.1 NAMING CONVENTIONS

Remember that Documents are for parents and students! Give them Titles that are easy to understand.

If you add a lot of the same type of Document (such as newsletters), make sure you title them in the same way every time. This will help website visitors to sort the Documents to find the one they want.

For newsletters and other time-sensitive content, it's good practice to start with the date in the YYYY-MM-DD format. This will help website visitors to quickly sort them newest to oldest.

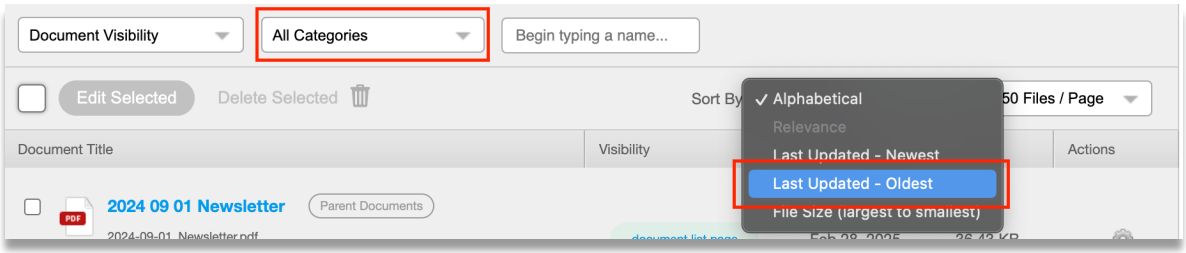
For example: "**2023-02-01 February School Newsletter**"

7.2 ANNUAL DOCUMENT CLEAN-UP

Try to set some time aside to clean up your website Documents once per year. Using the Sorting and Filtering options on the **Documents** tab you can quickly find out-of-date Documents.

On the **Documents** tab:

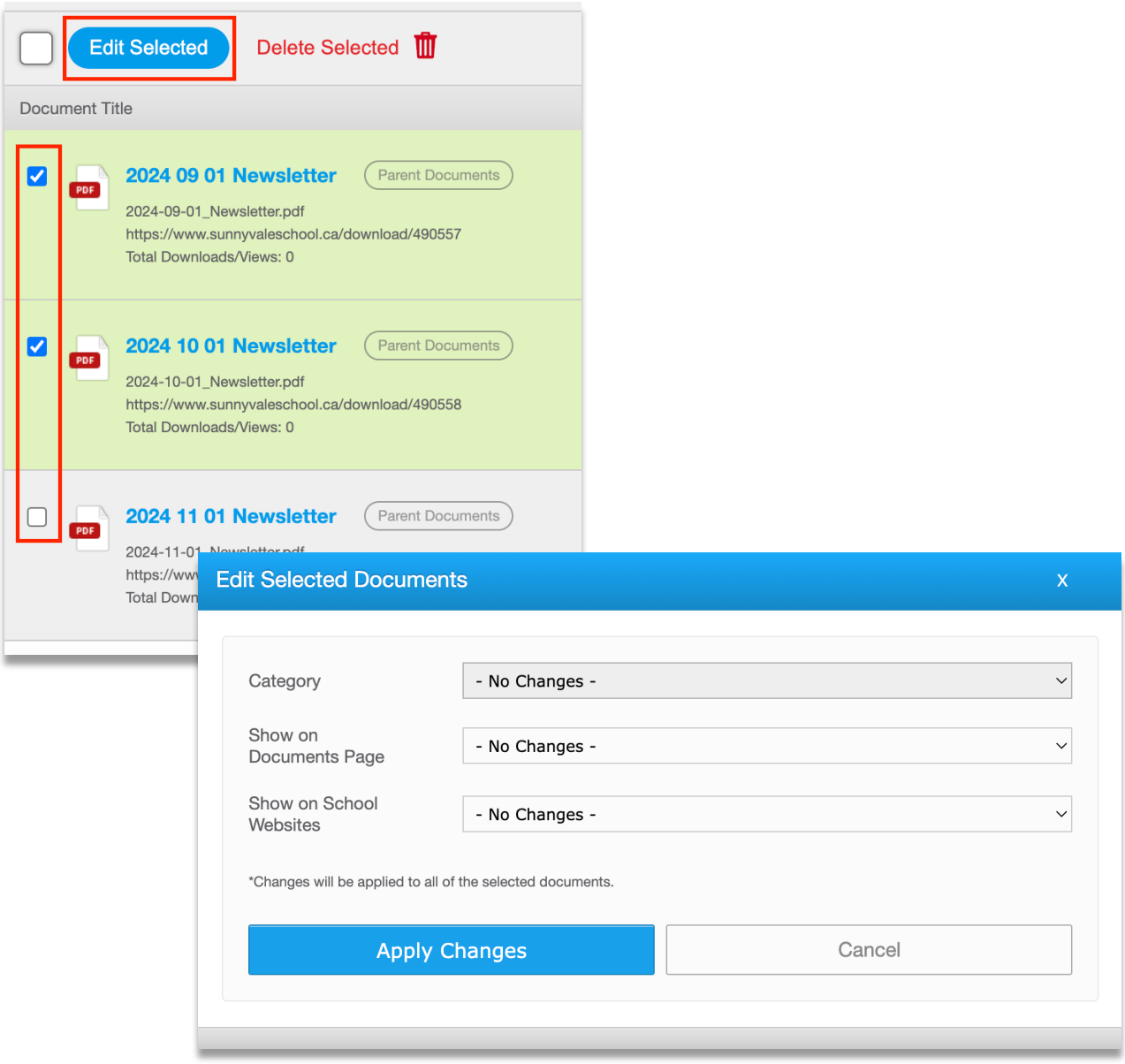
- Use the Category filter to view one Category at a time
- Sort Documents by Last Updated - Oldest to find your oldest Documents
- Delete time-sensitive Documents that are no longer needed by your audience, like old newsletters, schedules, and information about past events
- If there are two versions of a Document (such as a form) make sure the older one is deleted
- As you delete Documents, remember to also delete links to those Documents as you go



7.3 BULK EDIT OR DELETE DOCUMENTS

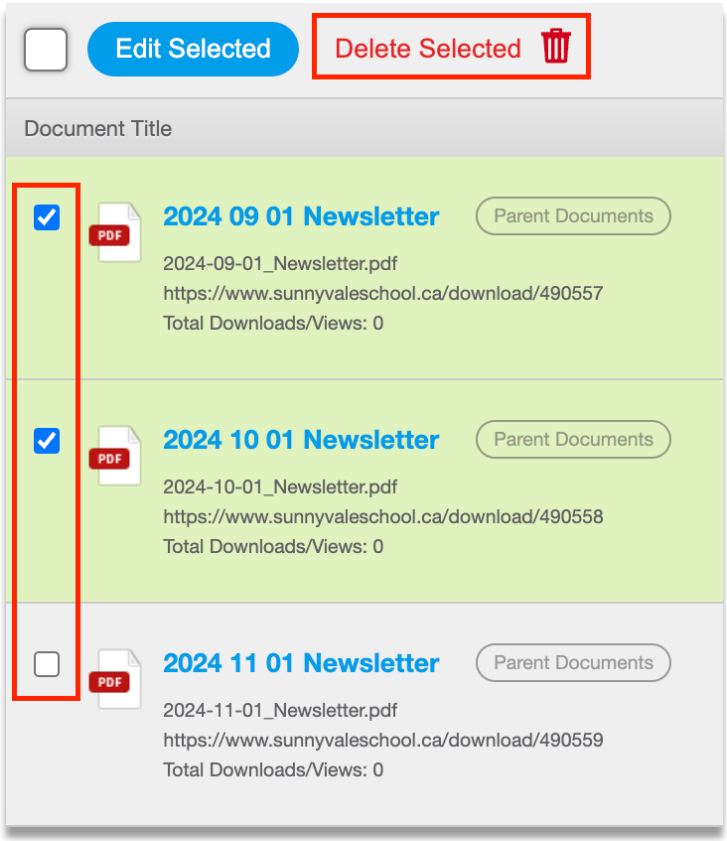
To bulk edit documents:

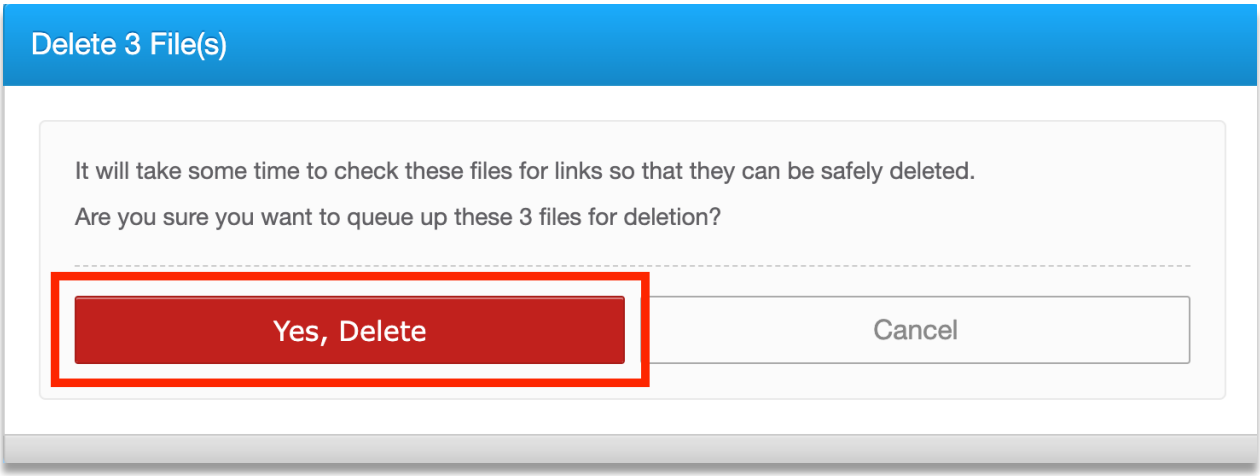
- On the **Documents** tab, click the checkbox next to all the Documents you want to edit (remember to use Sort and Filter to narrow the list)
- Click Edit Selected
- Changes the documents' Category or Visibility settings and click Apply Changes. Remember this change will apply to all the documents you selected.



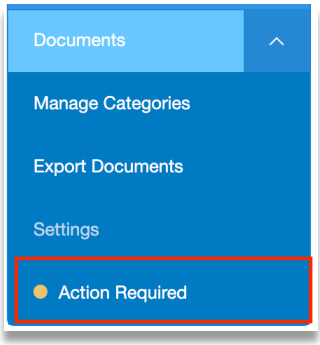
To bulk delete documents:

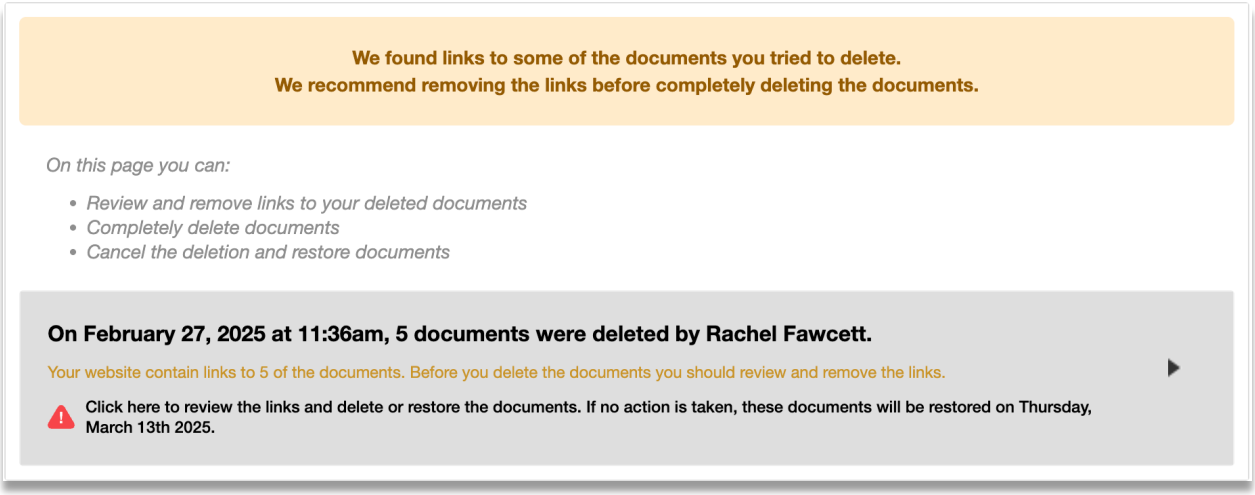
- On the **Documents** tab, click the checkbox next to all the Documents you want to delete (remember to use Sort and Filter to narrow the list)
- Click Delete Selected
- Rally will check if there are existing links to any of your deleted Documents

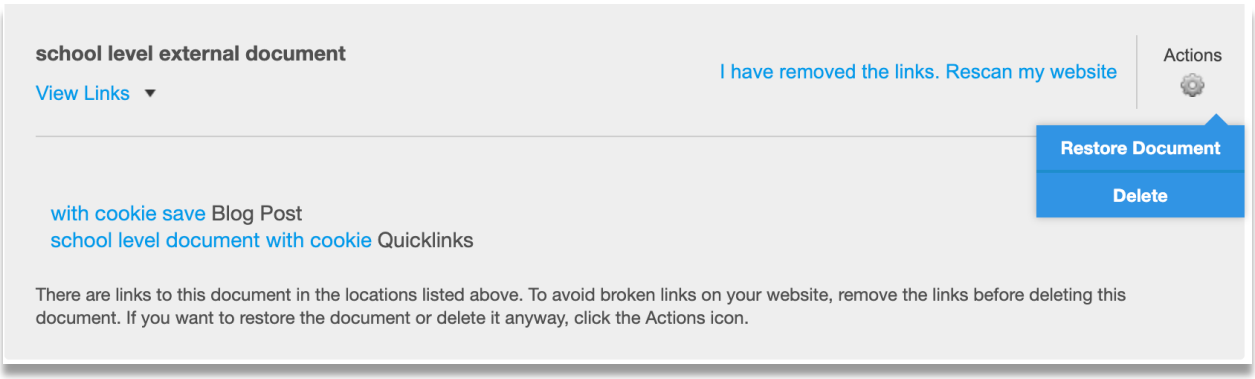




- A document will not be deleted if there are links that exist to that document throughout your website.
- You will receive a report by email. If documents failed to be deleted, follow the link in the email or click on Action Required in the Rally menu.
- Click on the report to see more information.
- Click on View Links to see specifically where documents are linked on your website and to resolve those issues.
- Click the gear icon if you would like to Restore a document to your website.
- If these issues aren't resolved within 2 weeks, the documents will automatically be restored into the Documents Module.



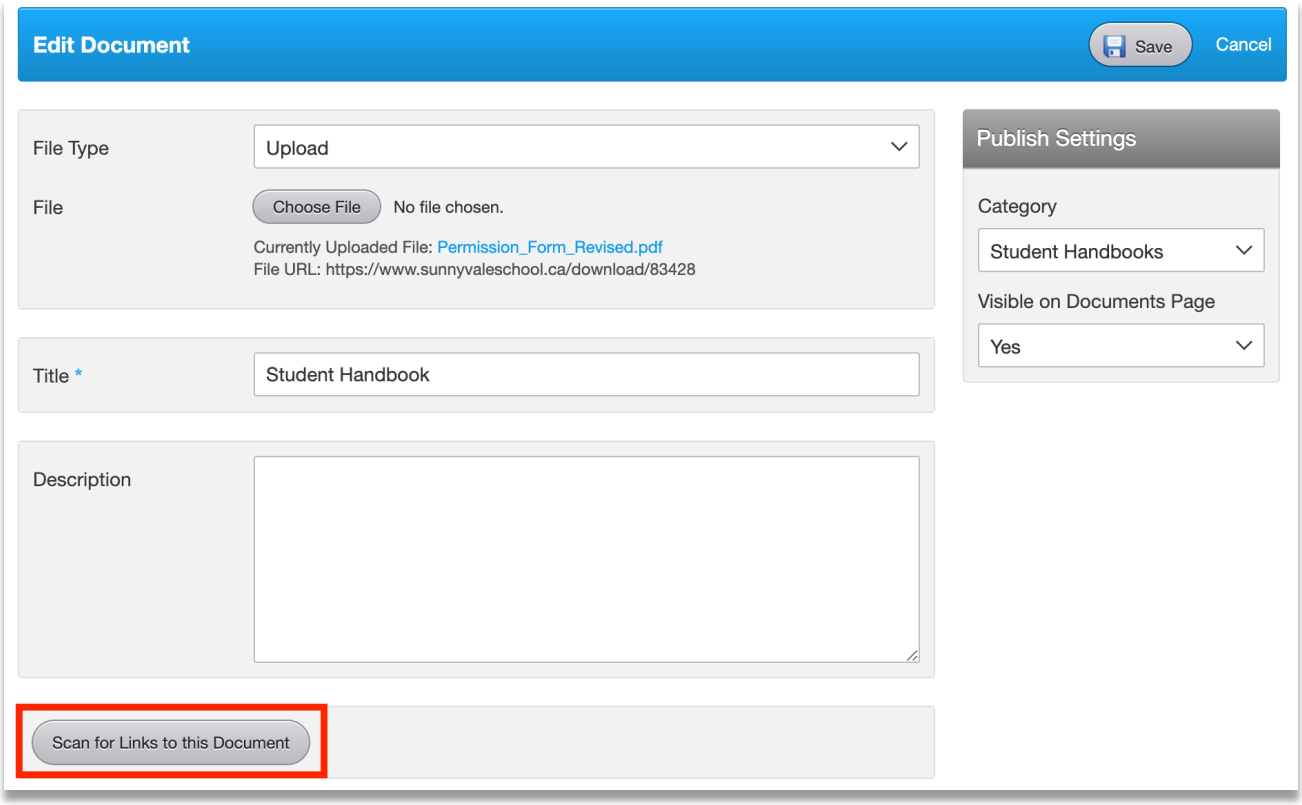
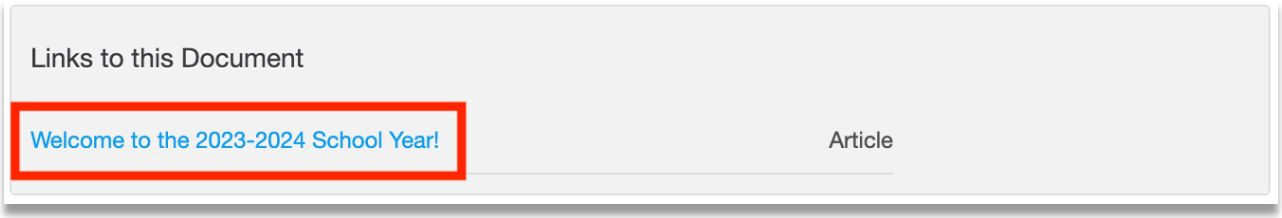




7.4 SCANNING FOR LINKS TO DOCUMENTS

Scan for links to your documents throughout your website to know where the document is being used.

- Find the document that you want to scan and click on the title
- Click Scan for Links to this Document



- Click on the title of any of the elements where the document is saved to go to that element to view or edit the link