



School Website Training – March 2025

Documents Masterclass

# 1 Introduction

Today we will 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

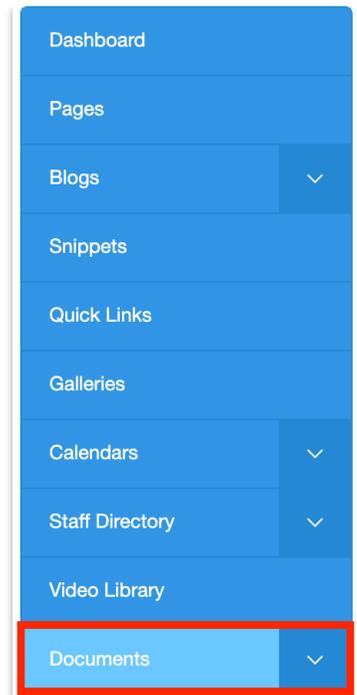
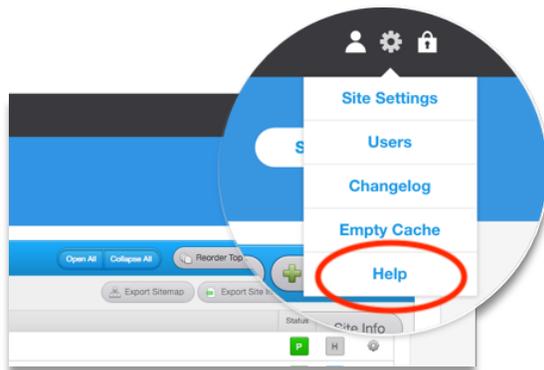
We'll start with a quick tour of a typical school website:

- 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

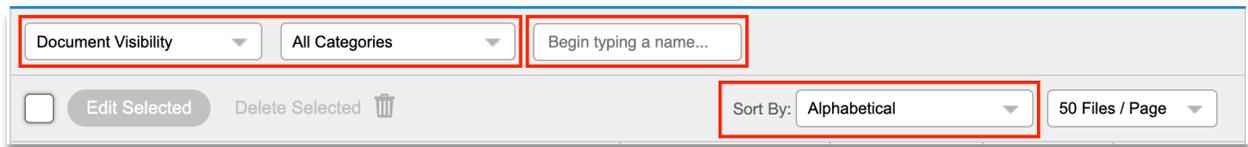
*Filter* your Document list according to:

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

*Search* for a Document by typing its name.

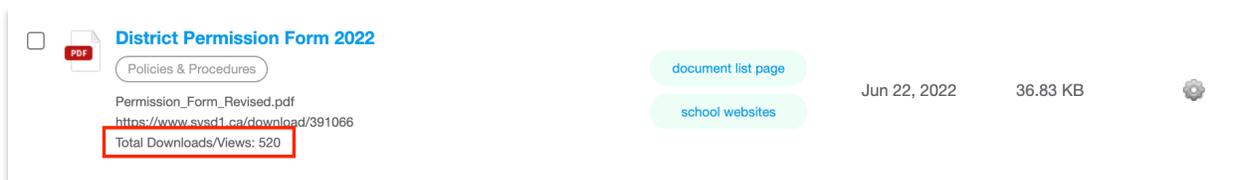
*Sort* using the dropdown menu. You can sort:

- 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

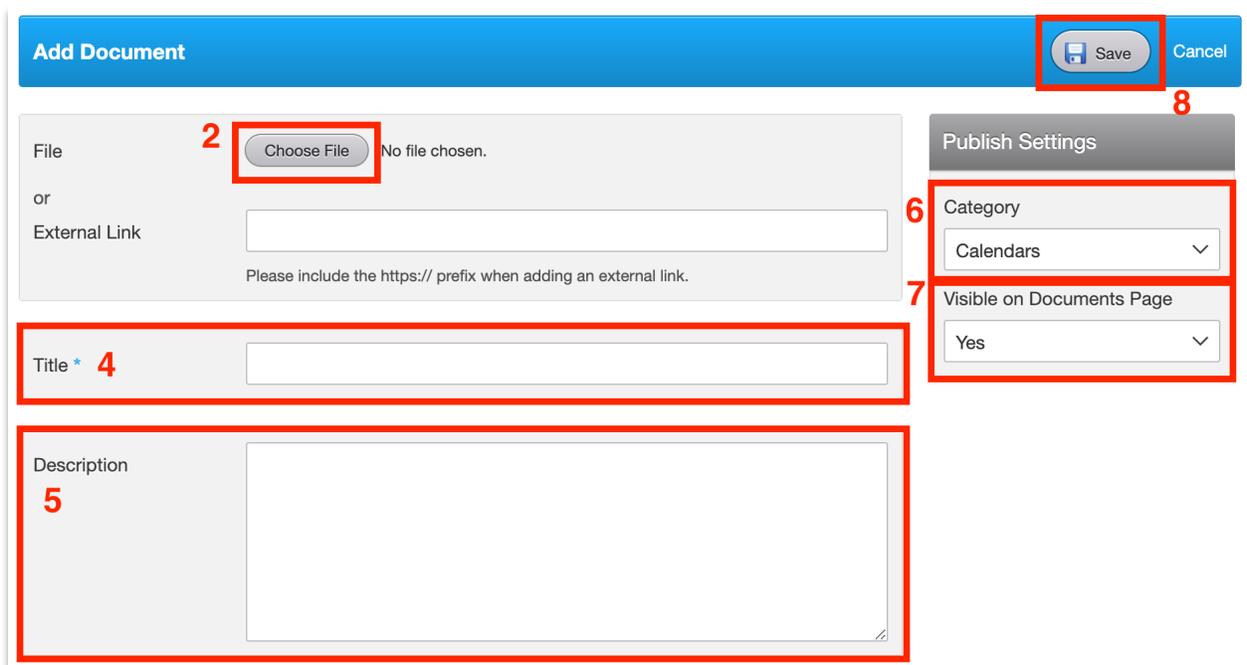
## 3.1 ADDING A FILE

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

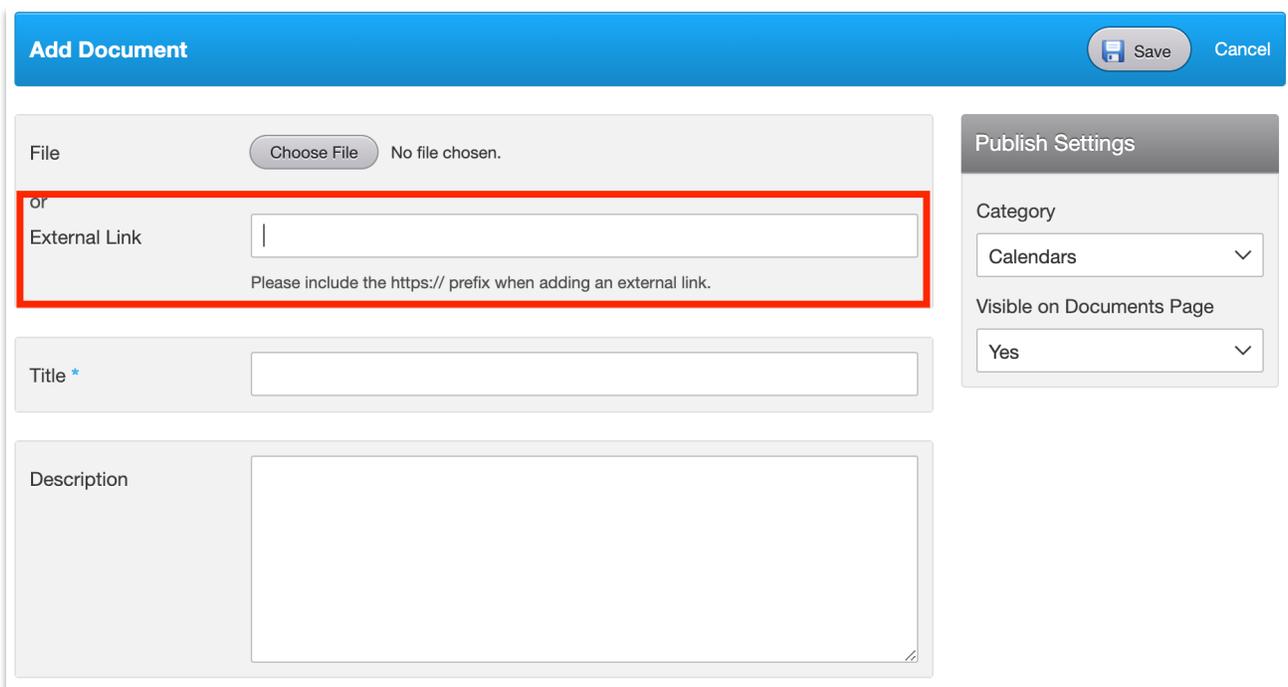
Online Documents such as Google Docs are increasingly popular. These Documents have a URL (a web address). They are not files that can be uploaded.

On the **Documents** tab:

- Click +Add Document



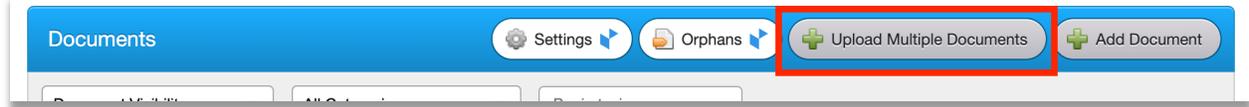
- Paste the URL for your online Document in the External Link field
- Enter the Document Title, Description (optional), Category, and Visibility
- Click Save

A screenshot of the 'Add Document' form. The form has a blue header with the title 'Add Document' and 'Save' and 'Cancel' buttons. The main content area is divided into several sections. On the left, there is a 'File' section with a 'Choose File' button and the text 'No file chosen.'. Below this is an 'or' separator, followed by an 'External Link' section with a text input field and the instruction 'Please include the https:// prefix when adding an external link.'. Below the 'External Link' section is a 'Title \*' section with a text input field. At the bottom is a 'Description' section with a large text area. On the right side, there is a 'Publish Settings' section with a 'Category' dropdown menu set to 'Calendars' and a 'Visible on Documents Page' dropdown menu set to 'Yes'.

### 3.3 UPLOADING MULTIPLE DOCUMENTS

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

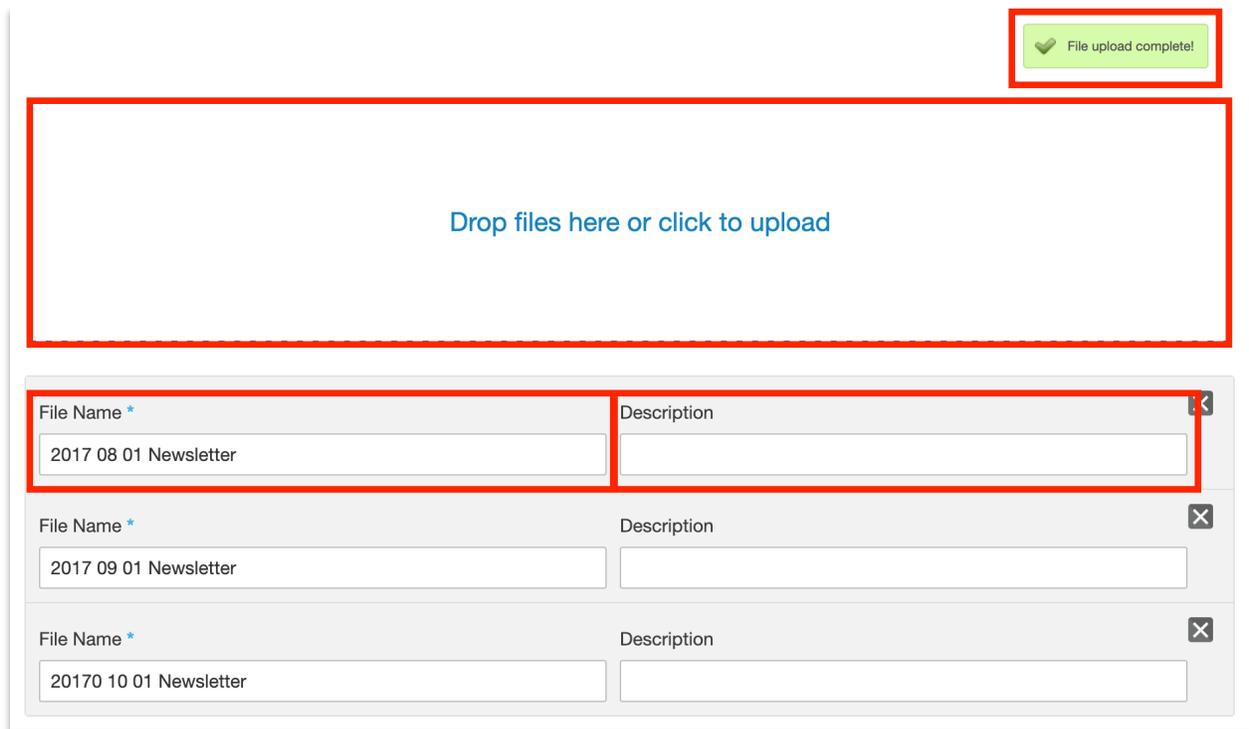
- Click +Upload Multiple Documents



- 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

A screenshot of a configuration form for document uploads. It has two rows. The first row is labeled 'Category \*' and has a dropdown menu with 'Select Category' and a downward arrow. The second row is labeled 'Show on Documents Page' and has a dropdown menu with 'Yes' and a downward arrow. Both rows are enclosed in a red rectangular box.

- 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

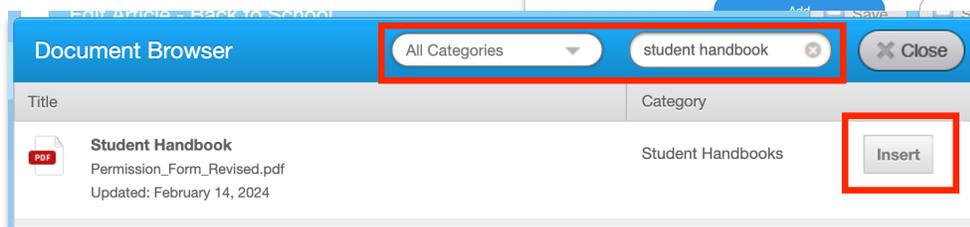
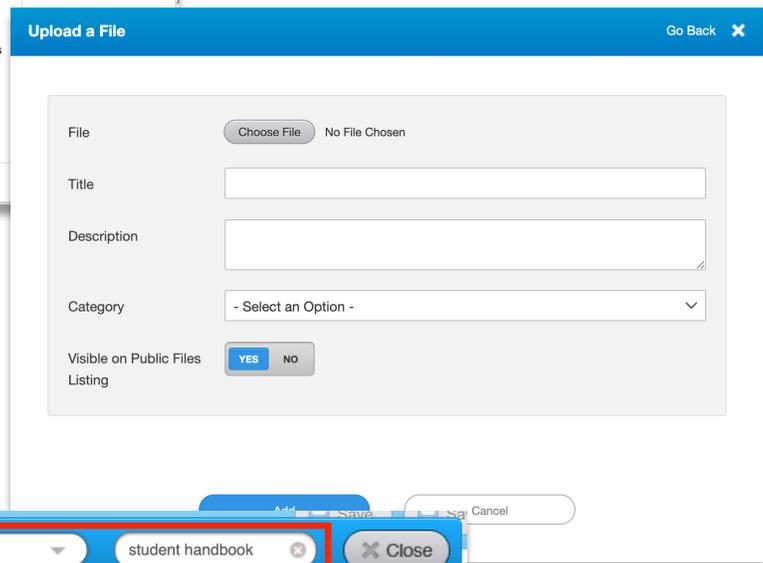
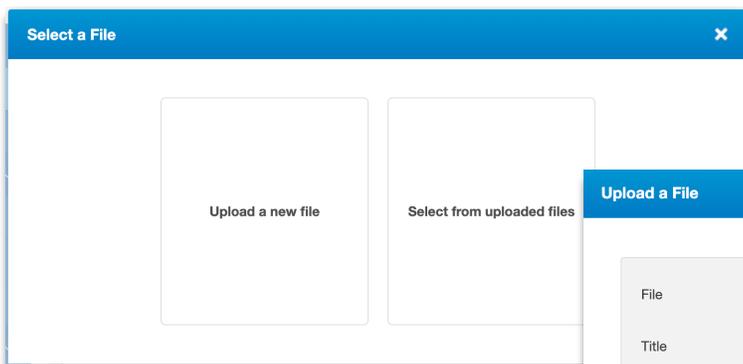
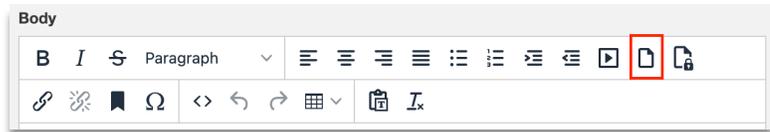
A screenshot of the document upload interface. At the top right, a green success message 'File upload complete!' with a checkmark icon is shown in a box. Below it is a large white drop box with a red border containing the text 'Drop files here or click to upload'. At the bottom, there is a table with three rows, each representing a document. The first row is highlighted with a red box. Each row has a 'File Name \*' column and a 'Description' column. The first row contains '2017 08 01 Newsletter' and an empty description field. The second row contains '2017 09 01 Newsletter' and an empty description field. The third row contains '20170 10 01 Newsletter' and an empty description field. Each row has a close button (X) on the right side.

# 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):

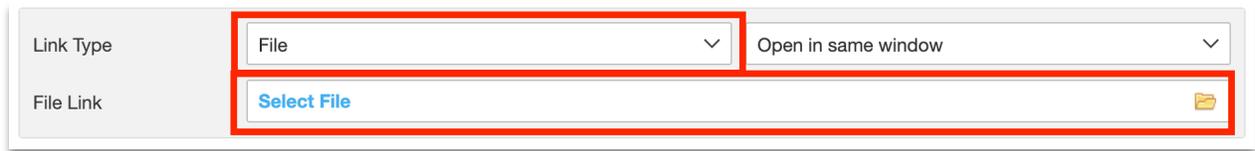
- Highlight the text you want to link to your document
- Click the Insert File tool in the toolbar
- Choose if you want to upload a brand new file or select from existing files in your Documents Module.
- If uploading a new file:
  - Fill out the necessary fields and click Add
  - As soon as you add 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



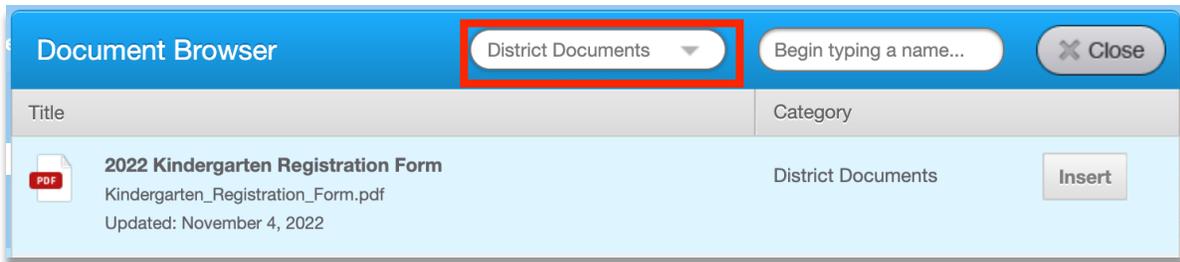
Link Type: File (dropdown) | Open in same window (dropdown)

File Link: [Select File](#) (button) | 

## 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.



Document Browser | **District Documents** (dropdown) | Begin typing a name... | Close

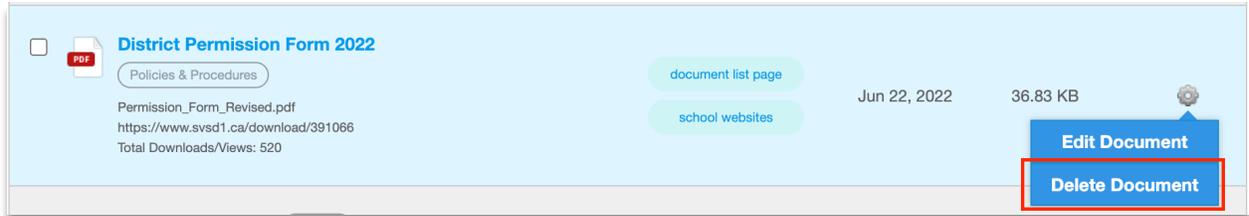
Title	Category
 <b>2022 Kindergarten Registration Form</b> Kindergarten_Registration_Form.pdf Updated: November 4, 2022	District Documents   <a href="#">Insert</a>

# 5 Deleting or Replacing Documents

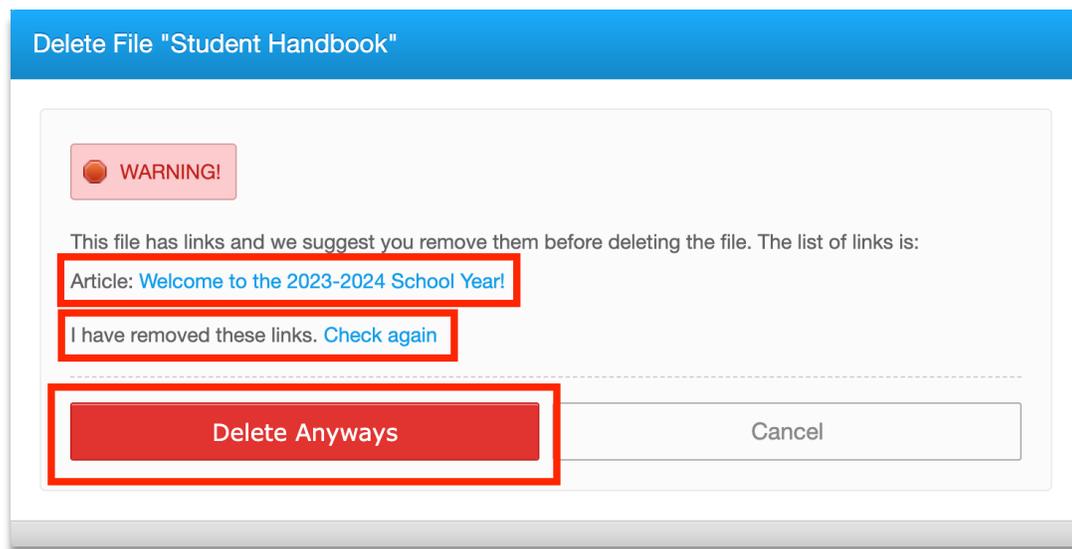
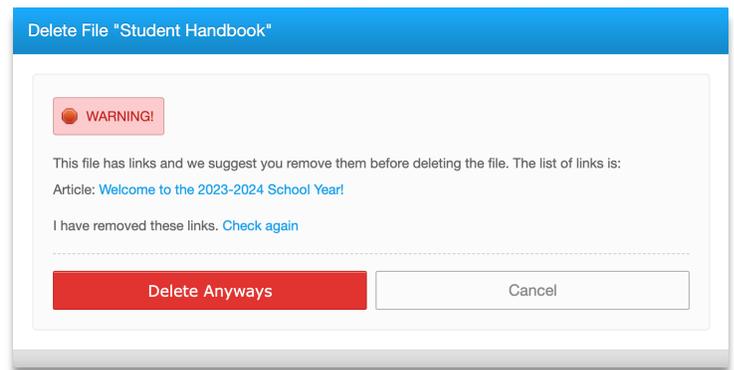
## 5.1 DELETING DOCUMENTS

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

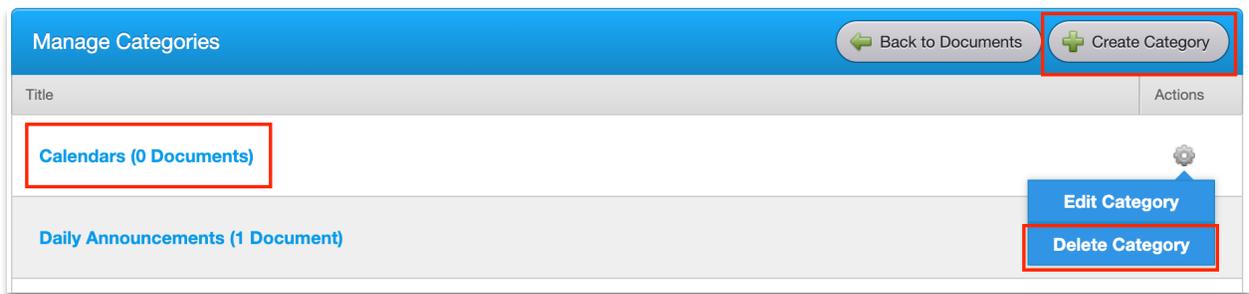
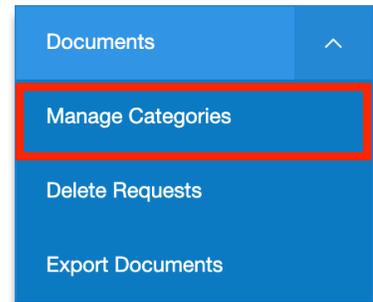
The screenshot shows the 'Edit Document' interface. At the top, there is a blue header bar with the text 'Edit Document' on the left and 'Save' and 'Cancel' buttons on the right. Below the header, the form is organized into several sections. On the left, there is a 'File Type' dropdown menu set to 'Upload'. Below it is the 'File' section, which includes a 'Choose File' button (highlighted with a red box), the text 'No file chosen.', and information about the currently uploaded file: 'Currently Uploaded File: Permission\_Form\_Revised.pdf' and 'File URL: https://www.sunnyvaleschool.ca/download/83428'. Below the file section is a 'Title \*' field containing the text 'Student Handbook'. At the bottom left is a 'Description' field with a large empty text area. On the right side of the form is a 'Publish Settings' sidebar. It contains a 'Category' dropdown menu set to 'Student Handbooks' and a 'Visible on Documents Page' dropdown menu set to 'Yes'.

# 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



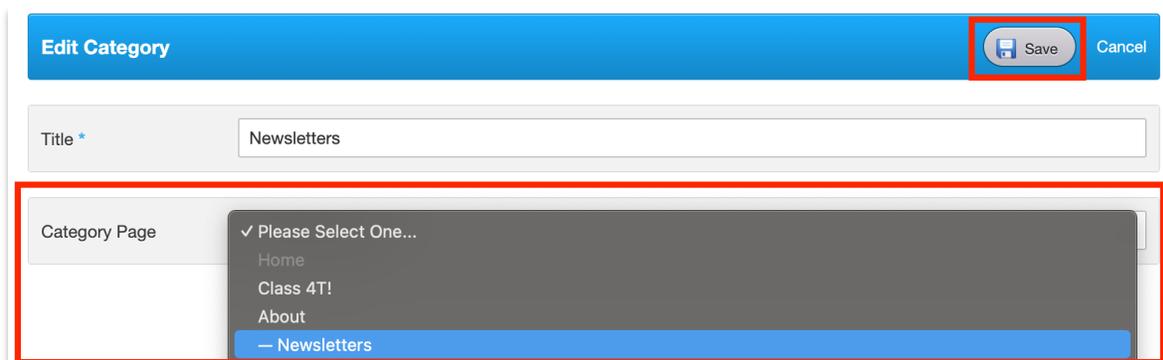
## 6.2 ATTACH A CATEGORY TO A PAGE

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.

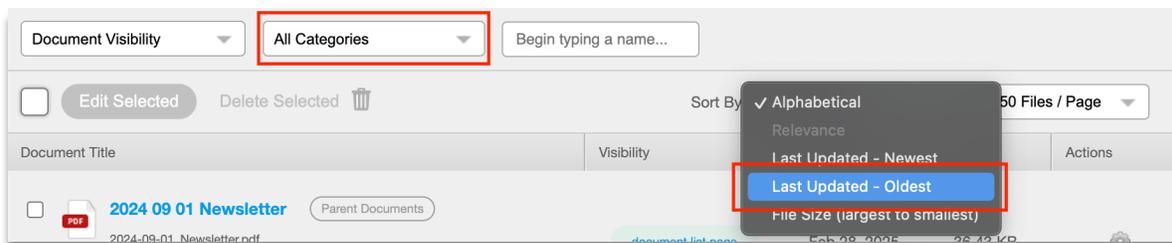
For example: **"2023-02-01 February School Newsletter"**

## 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

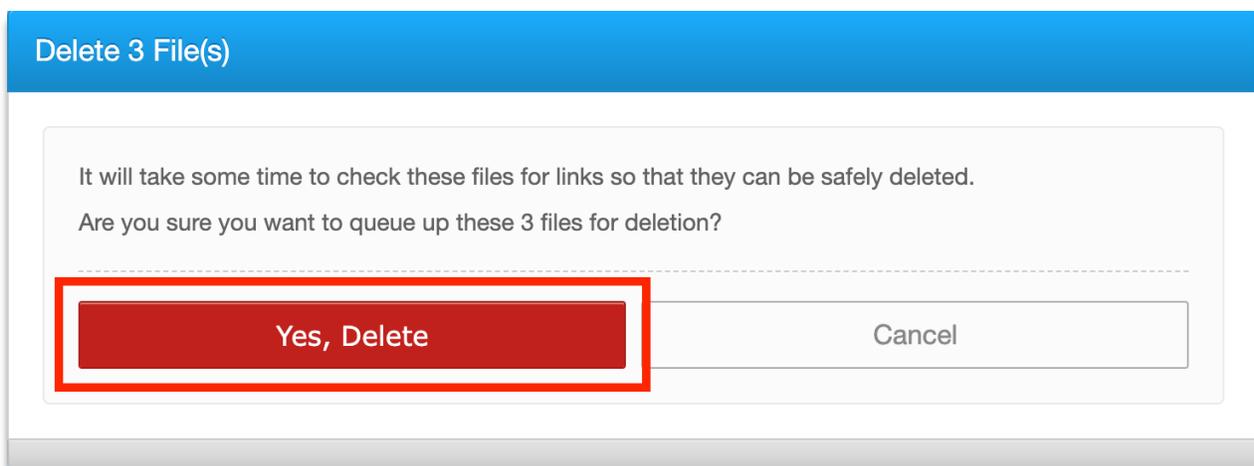
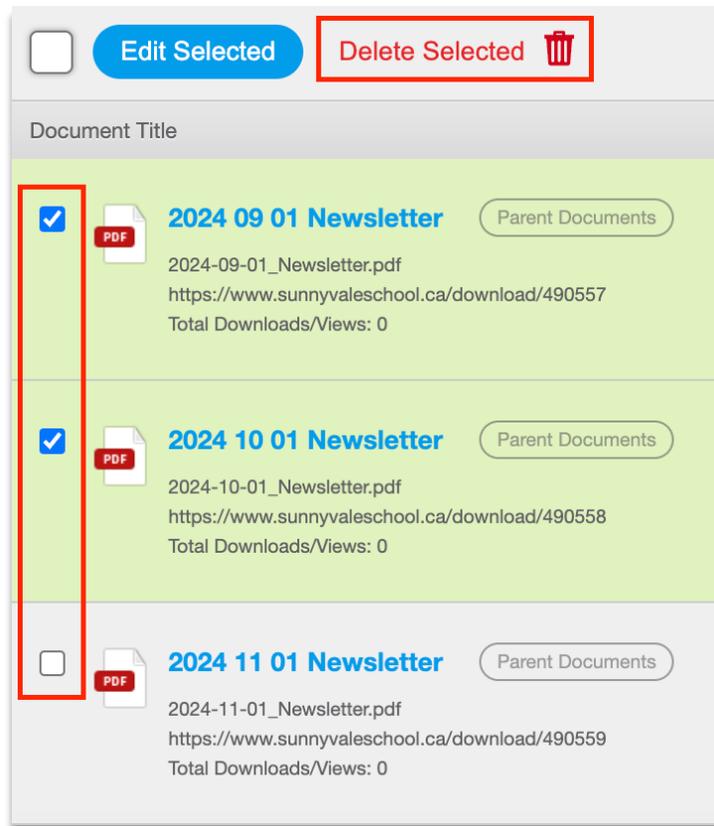
To bulk edit documents:

- 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.

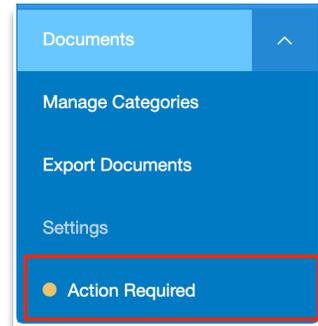
The screenshot displays a user interface for managing documents. At the top, there are two buttons: "Edit Selected" (highlighted with a red box) and "Delete Selected" with a trash icon. Below this is a list of documents under the heading "Document Title". Three documents are visible, each with a checkbox in the left margin (the first two are checked, the third is unchecked). The first two documents are highlighted in a light green background. Each document entry includes a PDF icon, the title, a "Parent Documents" button, the filename, the URL, and the total downloads/views. A modal dialog titled "Edit Selected Documents" is overlaid on the bottom right. It contains three dropdown menus for "Category", "Show on Documents Page", and "Show on School Websites", all currently set to "- No Changes -". A note at the bottom of the modal states: "\*Changes will be applied to all of the selected documents." At the bottom of the modal are two buttons: "Apply Changes" (in blue) and "Cancel".

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.



**We found links to some of the documents you tried to delete.  
We recommend removing the links before completely deleting the documents.**

On this page you can:

- Review and remove links to your deleted documents
- Completely delete documents
- Cancel the deletion and restore documents

**On February 27, 2025 at 11:36am, 5 documents were deleted by Rachel Fawcett.**

Your website contain links to 5 of the documents. Before you delete the documents you should review and remove the links.

 [Click here to review the links and delete or restore the documents.](#) If no action is taken, these documents will be restored on Thursday, March 13th 2025.

**school level external document** I have removed the links. [Rescan my website](#)

[View Links](#) Actions 

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**Restore Document**

**Delete**

[with cookie save](#) Blog Post  
[school level document with cookie](#) Quicklinks

There are links to this document in the locations listed above. To avoid broken links on your website, remove the links before deleting this document. If you want to restore the document or delete it anyway, click the Actions icon.

## 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

The screenshot shows the 'Edit Document' interface. At the top, there is a blue header with the text 'Edit Document' and two buttons: 'Save' and 'Cancel'. Below the header, the interface is divided into several sections. On the left, there is a 'File Type' dropdown menu set to 'Upload'. Below that is a 'File' section with a 'Choose File' button and the text 'No file chosen.' Below that, it says 'Currently Uploaded File: [Permission\\_Form\\_Revised.pdf](#)' and 'File URL: <https://www.sunnyvaleschool.ca/download/83428>'. Below the file information is a 'Title \*' field containing 'Student Handbook'. Below the title is a 'Description' field, which is currently empty. On the right side, there is a 'Publish Settings' section with a 'Category' dropdown menu set to 'Student Handbooks' and a 'Visible on Documents Page' dropdown menu set to 'Yes'. At the bottom of the form, there is a button labeled 'Scan for Links to this Document', which is highlighted with a red rectangular box.

- 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

The screenshot shows the 'Links to this Document' section. It has a title 'Links to this Document' at the top. Below the title, there is a list of links. The first link is 'Welcome to the 2023-2024 School Year!', which is highlighted with a red rectangular box. To the right of this link, the word 'Article' is displayed. Below the first link, there is a horizontal line, and then another link is partially visible, but it is not fully shown.