



WPI

WordPress Manual
For BETC

July 30, 2015

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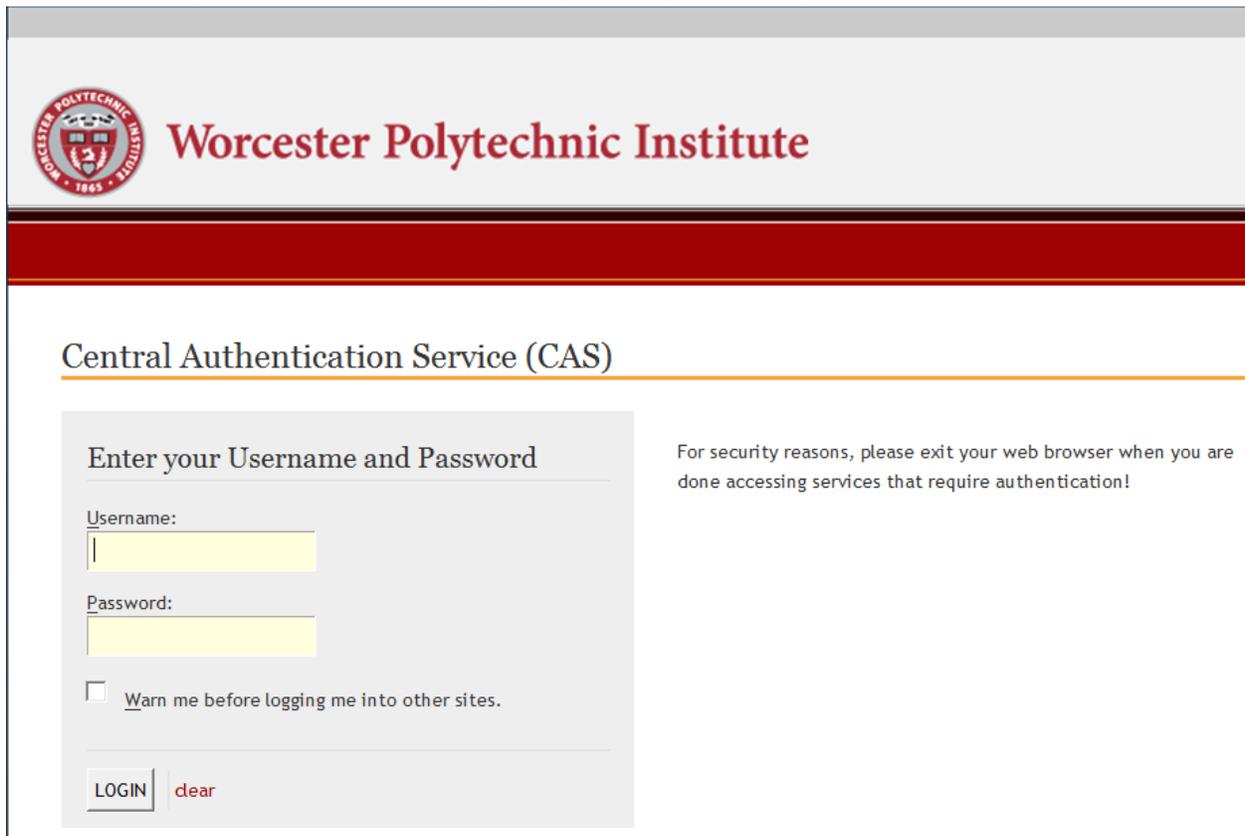
Who should use this manual

This document contains information specific to the BETC Blog theme. This document focuses on the custom features of the theme and assumes that you are already familiar with the WordPress interface and basic WordPress functions such as editing web pages and creating blog articles. If you haven't already reviewed the basic WordPress Manual, please download it from [http://www.wpi.edu/Images/CMS/Marketing/How to Use WordPress.pdf](http://www.wpi.edu/Images/CMS/Marketing/How_to_Use_WordPress.pdf).

Signing into WordPress

To access the login page in WordPress, add “/wp-admin” to the end of your web site name. For example: <http://wp.wpi.edu/betc/wp-admin>.

You will see the familiar WPI login screen as shown below. Use your WPI credentials to sign into your WordPress web site.



The screenshot shows the login interface for the Worcester Polytechnic Institute. At the top, there is a header with the WPI logo on the left and the text "Worcester Polytechnic Institute" in red. Below the header is a red horizontal bar. The main content area is titled "Central Authentication Service (CAS)" and features a login form on the left and a security warning on the right. The login form has a title "Enter your Username and Password" and contains two input fields: "Username:" and "Password:". Below these fields is a checkbox labeled "Warn me before logging me into other sites." At the bottom of the form are two buttons: "LOGIN" and "clear".

Worcester Polytechnic Institute

Central Authentication Service (CAS)

Enter your Username and Password

Username:
|

Password:
|

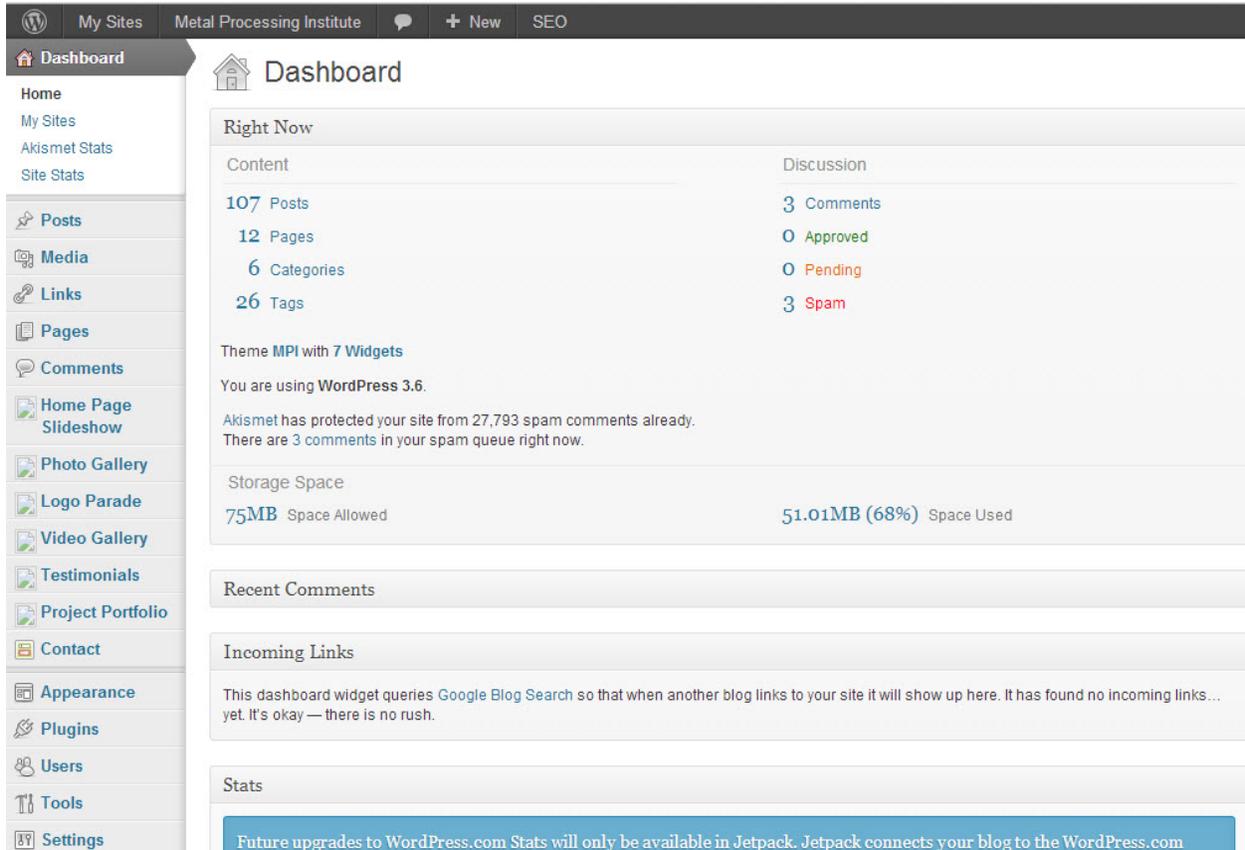
Warn me before logging me into other sites.

LOGIN clear

For security reasons, please exit your web browser when you are done accessing services that require authentication!

The WordPress Dashboard and Left-Hand Navigation Menu

Upon logging in, the first screen that you will see is called the Dashboard screen. The Dashboard provides a quick overview of your web site – the number of blog posts, web pages, comments, spam, etc. You can click on any of these items to go directly to that section of the admin.



The screenshot shows the WordPress Dashboard for a site named 'Metal Processing Institute'. The top navigation bar includes 'My Sites', 'Metal Processing Institute', '+ New', and 'SEO'. The left-hand navigation menu is expanded to show 'Dashboard', 'Home', 'My Sites', 'Akismet Stats', 'Site Stats', 'Posts', 'Media', 'Links', 'Pages', 'Comments', 'Home Page Slideshow', 'Photo Gallery', 'Logo Parade', 'Video Gallery', 'Testimonials', 'Project Portfolio', 'Contact', 'Appearance', 'Plugins', 'Users', 'Tools', and 'Settings'. The main content area displays the 'Dashboard' title and a 'Right Now' summary. Under 'Content', there are 107 Posts, 12 Pages, 6 Categories, and 26 Tags. Under 'Discussion', there are 3 Comments, 0 Approved, 0 Pending, and 3 Spam. Below this, it shows the theme 'MPI with 7 Widgets' and 'WordPress 3.6'. A message from Akismet states: 'Akismet has protected your site from 27,793 spam comments already. There are 3 comments in your spam queue right now.' The 'Storage Space' section shows 75MB Space Allowed and 51.01MB (68%) Space Used. The 'Recent Comments' section is empty. The 'Incoming Links' section shows a message: 'This dashboard widget queries Google Blog Search so that when another blog links to your site it will show up here. It has found no incoming links... yet. It's okay — there is no rush.' The 'Stats' section has a blue banner: 'Future upgrades to WordPress.com Stats will only be available in Jetpack. Jetpack connects your blog to the WordPress.com'.

The left-hand navigation menu is the main way to navigate through the WordPress Admin. This menu appears to the left on every Admin page and each section is expandable. Depending upon your theme and the plugins you have installed, your menu options may be slightly different than what's shown in the screenshot above.

Below is a brief description of each of these sections:

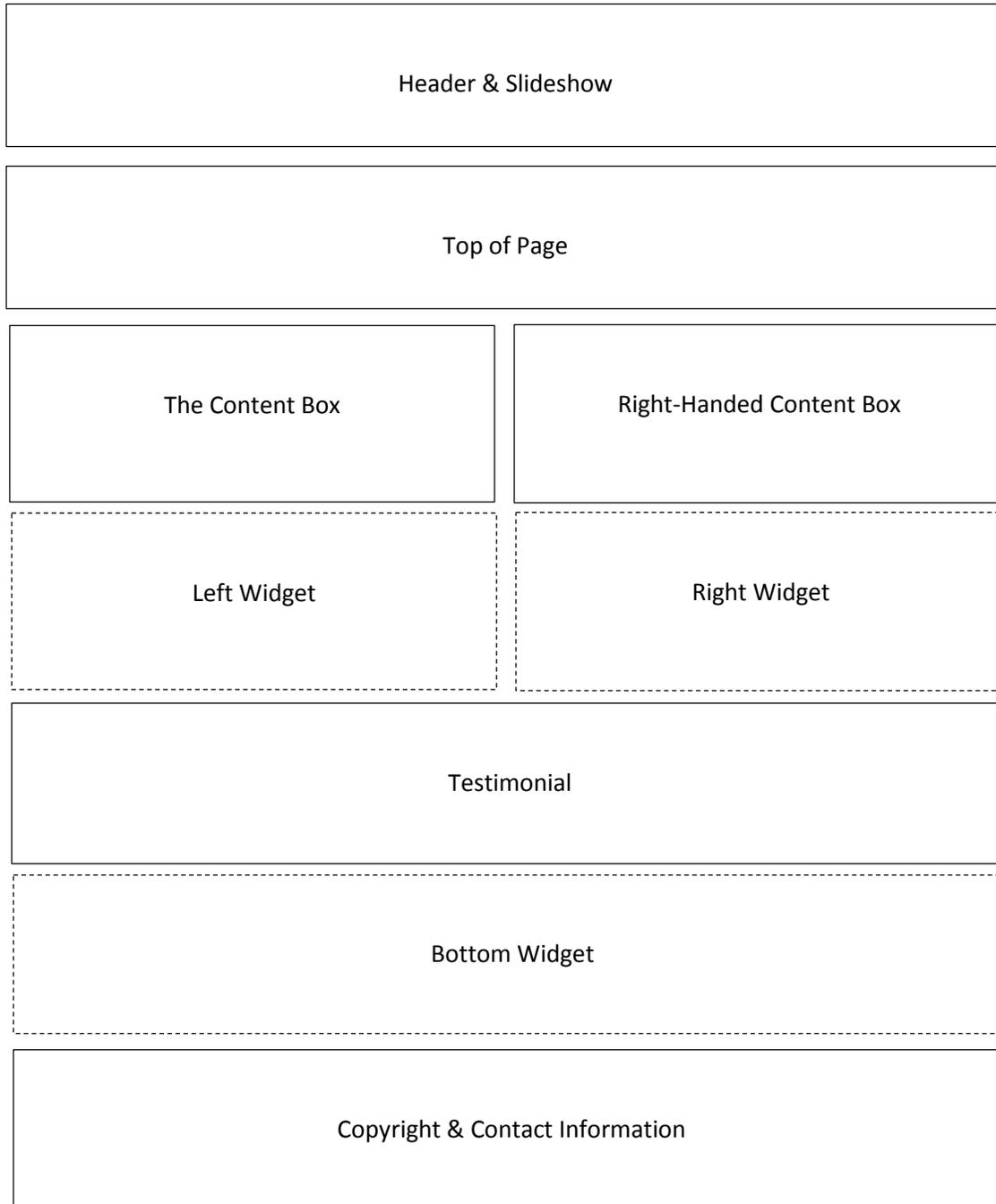
1. Dashboard – click on this menu item anytime you want to return to this main screen.
2. Posts – this is where you go to create/edit your blog articles.
3. Media – the media library stores all photos and documents that you've uploaded to your web site.
4. Pages – this is where you create and edit your web site pages.
5. Comments – if you have a blog & comments are turned on, this is where you would go to moderate your comments
6. Home Page Slideshow – your theme is set up to have an optional slideshow on the home page. This is where you would go to upload your photos.
7. Photo Gallery – in this section you can upload photos to create slideshows
8. Logo Parade* – upload logos (with optional link) to create a logo slider.

9. Video Gallery* – create video galleries – you can upload videos and/or display YouTube videos
10. Testimonials* – add quotes to your web site (with optional photo)
11. Project Portfolio* – can be used to display research projects
12. Appearance – this is where you manage your sidebar widgets, your menus, and your theme settings
13. Plugins – these are modules that allow you to add special functionality to your web site
14. Users – this is where you can grant access to new users or modify your profile
15. Tools – most users will never need anything listed under tools, unless you want to export your site to XML or permanently delete your site (be careful – once deleted you cannot get it back!)
16. Settings – this is where your WordPress settings are saved.

*As of the writing of this document, these features are available with this theme but not currently in use by the BETC.

The Home Page Layout

The home page has a special layout as shown below. Each of these boxes are optional which allows us to customize the look & feel of the home page. The dotted lined boxes represent optional widgets that can be added to the page as needed.



Editing the Home Page

To edit the home page, go to the Pages menu and select Home. The different editing boxes as described below work the same as the standard WordPress editor. As mentioned above, all of the boxes on the home page are optional and if no content is added to a box it will not be displayed.

Header & Slideshow

The header area contains the logo, menu and slideshow.

- **Menu:** If a new page is added to the web site, it needs to be added to the menu via the WordPress menu manager (Appearance → Menu)
- The slideshow can be modified using the Home Page Slideshow section as described later in this document.

Top of Page

When editing the home page, the content for the Top of Page section is in the topmost box.

The Content Box

The Content Box is appears on the left side of the webpage and is half-width. It's "sister box" is the Right-Handed Content Box.

Right-Handed Content Box

The Right-Handed Content Box is appears on the right side of the webpage next to the Content Box and is also half-width.

Testimonial

The Testimonial area on the home page is automatically built for you. All you need to do is select the name of the person from the drop-down box. To add new Testimonials, see the section on Testimonials later in this document.

Copyright & Contact Information

This is a protected area of the web page that appears on all web pages. Any changes to this section would need to be updated by Marketing.

Home Page Widgets

Widgets are optional sections that can be added from the Appearance→Widgets menu. On the far side of this page, you will see two options labelled "**Home Page**" and "**Home Page Footer.**" Note that you can add as many widgets to these sidebars as you want.

- **Left/Right Widgets** – To add left & right hand boxes as shown in the above diagram:
 1. Click on the down arrow next to "Home Page" to open up the sidebar
 2. Find the Text widget on the left side of the screen and drag it into the Home Page sidebar
 3. Add a title in the top box and your content in the box below it. Click the Save Button.
- **Bottom Widgets** – To add full width boxes as shown in the above diagram:
 1. Click on the down arrow next to "Home Page Footer" to open up the sidebar
 2. Find the Text widget on the left side of the screen and drag it into the Home Page Footer
 3. Add a title in the top box and your content in the box below it. Click the Save Button.

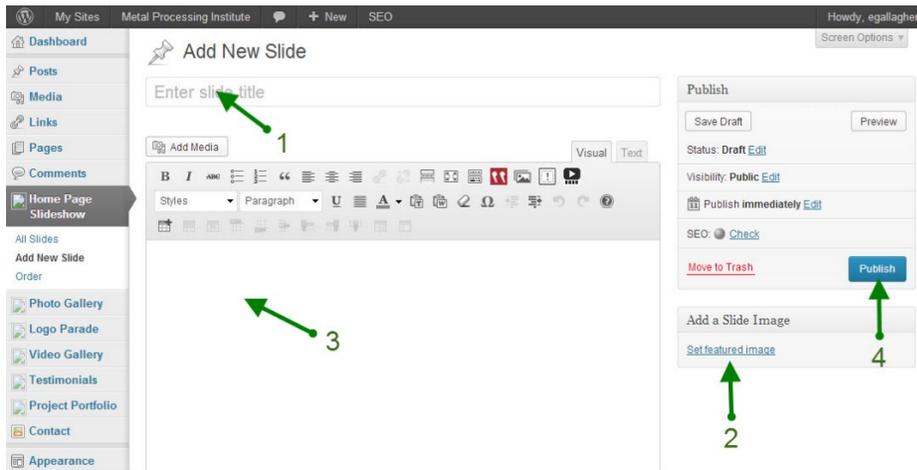
Home Page Slide Show

From the left-hand navigation menu, click on the Home Page Slideshow. You may have one or more images on this page.

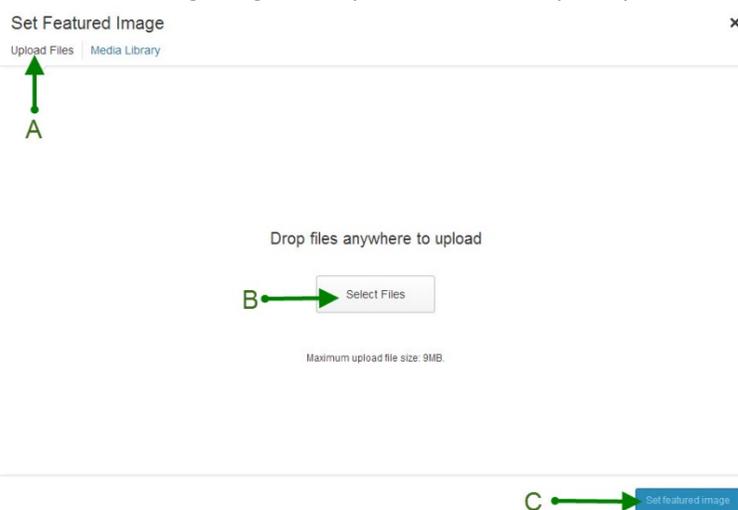
The ideal image size is **1300px wide by 800px high**. The photo size does not have to be exact but you will have more control over the display if you crop the images before uploading to WordPress. Photos will be resized automatically to fit these dimensions, but may become distorted if the image is not in the right proportions.

Add New Slide

To add a new slide, select “Add New Slide” from the left-hand navigation menu.



1. Add a title for your slide – this will be used as the heading text on the slide. If you don’t want any text on the slide, just add a space in the title area.
2. Click on “Set Featured Image” in the right sidebar. A new window will pop up where you can either select an existing image from your media library or upload a new one.



- a. Click on Upload Files
- b. Click on Select Files. Browse to the location on your computer where the image is, select the image and click Open. You can also drag & drop photos into this window. The image will be uploaded to your media library.
- c. Click the Set Featured Image button to insert the photo into your slideshow.

3. Add a brief description in the WordPress editor box, which will be displayed beneath the heading on the slide show.
4. Click the Publish button to save your changes.

Edit Slides

1. To edit a slide, select “All Slides” from the Home Page Slideshow menu. Hover over the image you wish to update and select Edit from the menu
2. To change the photo, click on the “Remove featured image” link in the right hand column, beneath the image.
3. Once the image has been removed, this text changes to “Set featured image.” Follow the same instructions above for uploading a new slideshow image.
4. You can also edit the title and description text as necessary.
5. Click the Update button to save your changes.

Order Slides

If you'd like to change the order that your slides appear in the slideshow, click on the “Order” option under Home Page Slideshow in the left-hand navigation menu. Drag & drop your photos to re-arrange the order. Click “Update Post Order” to save your changes.

Adding Your Slideshow to the Home Page

You do not need to do anything to add the slideshow to the home page. The template will automatically take care of this for you.

Photo Gallery

The Photo Gallery menu allows you to create slideshows for your other pages. These slideshows can be used on your web pages, blog posts, and even in the sidebar.

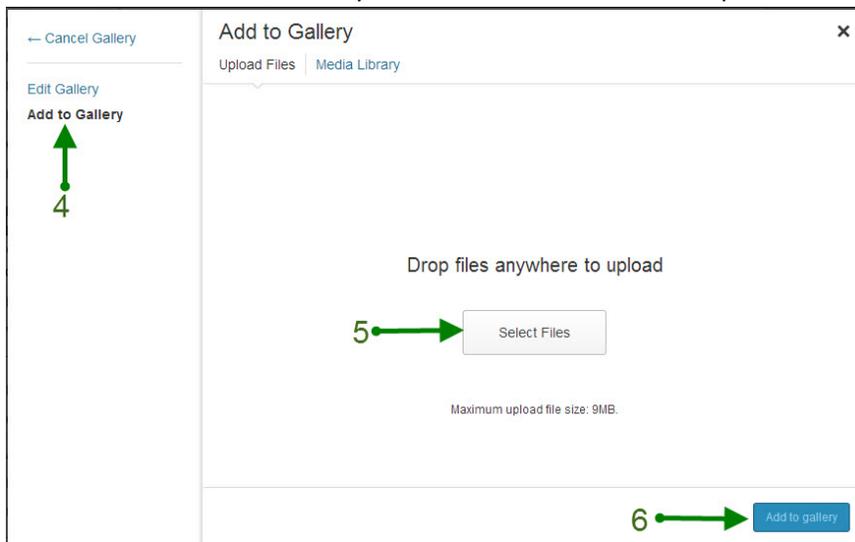
From the left-hand navigation menu, click on Photo Gallery.

Add New Gallery

1. To add a new gallery, select “Add New Gallery” from the left-hand navigation menu.



2. Enter a title for the photo gallery. This does not appear on the web site but will help you to identify your different photo galleries.
3. Click on the Create Gallery Button. A new window will open.



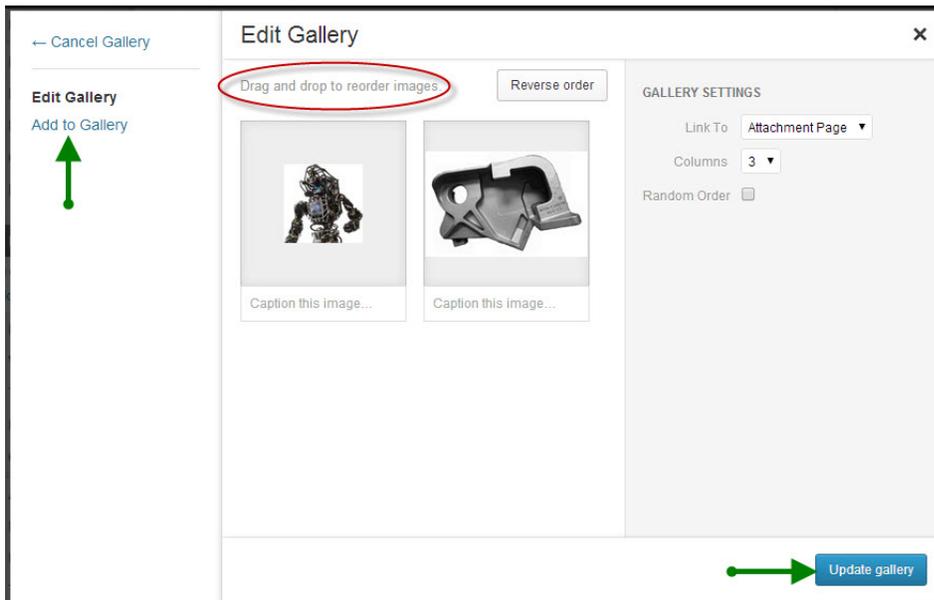
4. Click on Add to Gallery.
5. Click on Select Files. Browse to the location on your computer where your images are. You can select multiple files by holding down the CTRL button as you click. Once you've selected all your images, click Open. You can also drag & drop photos into this window.
6. Click the Add to Gallery button to add the photos to your gallery.
7. Click the Publish button to save your photo gallery.

Photo Captions (optional)

When you are creating a new gallery or editing an existing gallery, you can click on each photo to add a title and caption. The caption can be typed directly below the photo or on the right side of the screen. The title and caption fields will be displayed above each photo in the gallery.

Edit Gallery

1. To edit a gallery, select “All Galleries” from the Photo Gallery menu. Hover over the gallery you wish to update and select Edit from the menu
2. To change the photos, click on the “Edit Gallery” button.



3. To add additional photos, click on the “Add to Gallery” button and follow the instructions above (under Add New Gallery.)
4. You can also re-order the photo display by dragging the images.
5. Click the Update Gallery button to save your changes.
6. Click the Update button to save your changes.

Adding a Gallery to a Page



To add a photo gallery to your web page, place your cursor in the location where you’d like your photos to be displayed and click on the Photo Gallery Button on the toolbar. Select the name of the Photo Gallery from the drop-down menu and click the “Insert Shortcode” button. To preview the gallery, you’ll need to click on the Preview Changes button in the Publish box. The preview will open in a new tab. To save your changes, make sure you click on the Publish/Update button in the right sidebar.

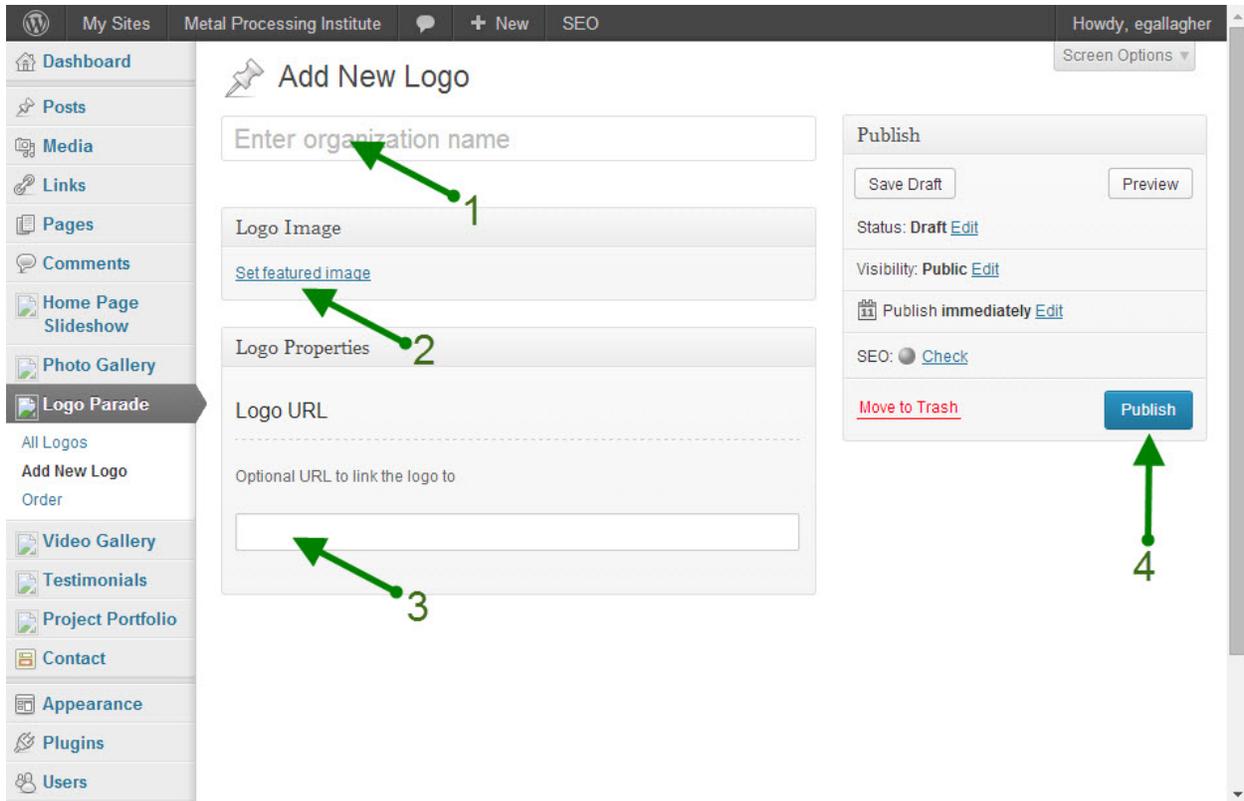
Logo Parade

The logo parade creates a rotating list of logos and their respective links. Since logos come in all shapes and sizes, it is almost impossible to make all of them the same width and height. To create a somewhat uniform look & feel, all logos should be pre-sized to be no larger than 300 pixels wide by 120 pixel high.

From the left-hand navigation menu, click on Logo Parade.

Add a New Logo

To add a new logo, select “Add New Logo” from the left-hand navigation menu.

A screenshot of the WordPress dashboard showing the 'Add New Logo' page. The left-hand navigation menu is visible, with 'Logo Parade' selected. The main content area has four green arrows with numbers 1 through 4 pointing to specific elements: 1 points to the 'Enter organization name' text input field; 2 points to the 'Set featured image' link under the 'Logo Image' section; 3 points to the 'Optional URL to link the logo to' text input field; and 4 points to the blue 'Publish' button in the right-hand 'Publish' sidebar.

1. Enter the name of the organization. This is for your reference only and is not displayed on the web site.
2. Click the Set Featured Image link. When the Set Featured Image box opens:
 - a. Click on the Upload Files link
 - b. Click on the Select Files button
 - c. Navigate to the logo image on your computer, select the image and click Open.
 - d. Click on the Set Featured Image button.
3. You can add an Optional URL that will allow the user to click on the logo to go to the organization’s web site.
4. Click on the Publish button to save your changes.

Edit a Logo

To edit a logo, select “All Logos” from the Logo Parade menu. Hover over the logo you wish to update and select Edit from the menu

On this page, you can:

1. Update the Organization Name (note that this is not displayed on the web site)
2. Update the URL
3. Replace the Logo image
 - a. To change the image, click on the “Remove featured image” link beneath the logo.
 - b. Once the image has been removed, this text changes to “Set featured image.” Follow the same instructions above for uploading a new logo.
4. Click the Update button to save your changes.

Order Logos

If you’d like to change the order that your logos appear in the slideshow, click on the “Order” option under Logo Parade in the left-hand navigation menu. Drag & drop your logos to re-arrange the order. Click “Update Post Order” to save your changes.

Add Logo Parade to a Web Page

To add the logo parade to a web page, you’ll need to add the following shortcode in the editor where you would like the parade to display: **[parade]**

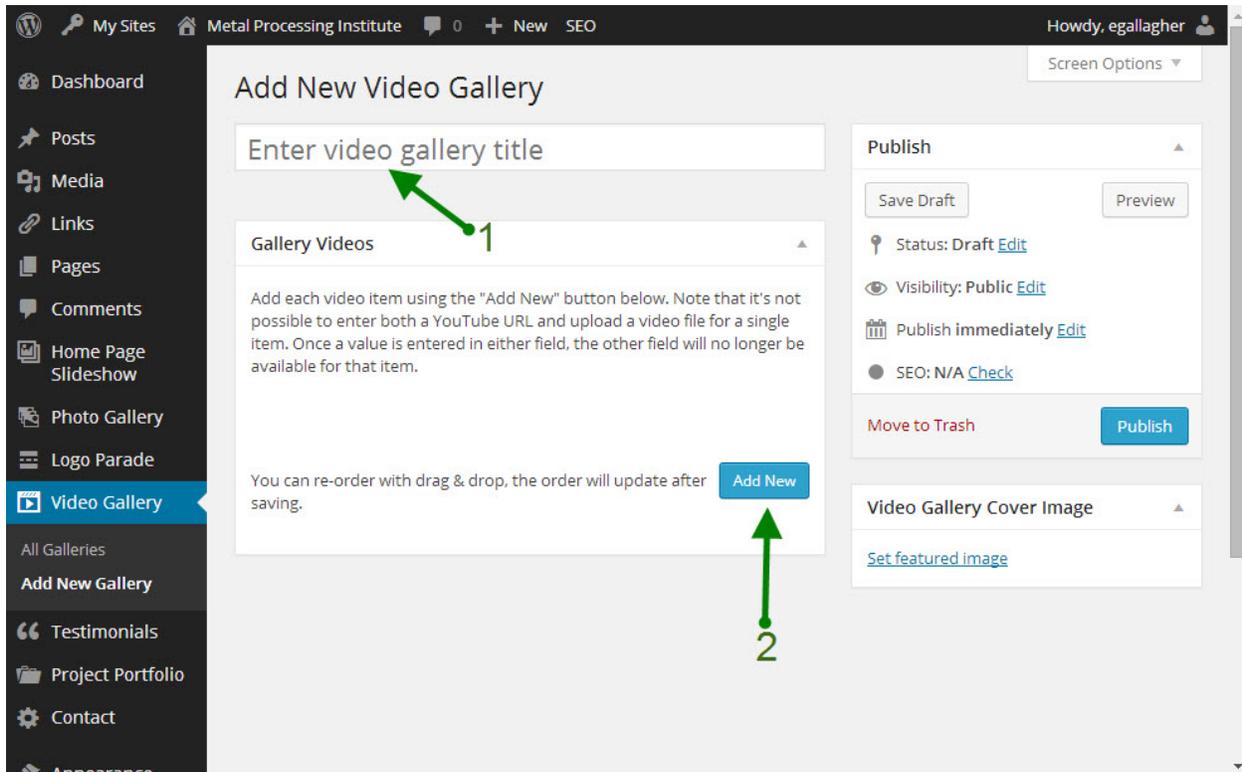
To preview the logo parade, you’ll need to click on the Preview Changes button in the Publish box. The preview will open in a new tab. To save your changes, make sure you click on the Publish/Update button in the right sidebar.

Video Gallery

The video gallery allows you to add a video player to your web site. From the left-hand navigation menu, click on Video Gallery.

Add a New Video Gallery

To add a new video gallery, select “Add New Gallery” from the left-hand navigation menu.



1. Enter the name of the video gallery. This name is not displayed on the web page but is for your reference so that you can differentiate between video galleries.
2. Click on the Add New Button. The screenshot on the follow page displays the fields for adding a new video.

Gallery Videos

Add each video item using the "Add New" button below. Note that it's not possible to enter both a YouTube URL and upload a video file for a single item. Once a value is entered in either field, the other field will no longer be available for that item.

✎
✖

Title

Video Cover Image 2

1

Upload a video cover image:

+

YouTube URL

Enter the YouTube URL of the video:

Upload a Video 4

3

Upload a supported video file (mp4/webm/ogg):

+

You can re-order with drag & drop, the order will update after saving.

Add New

1. Enter a title for your video. This is for your reference only and is not displayed on the website.
2. Click the plus button to upload a video cover image. This will be displayed as a thumbnail image beneath the video gallery and will allow the user to click from one video to another.



The thumbnail images are not resized by WordPress, so you'll have to size them before uploading. This gives you the flexibility to choose your thumbnail size, depending upon the number of videos you have in your gallery. For example, the screenshot at the left shows thumbnails that are 150 pixels by 150 pixels. This will allow you to fit 4 images beneath the gallery. If you have 5 videos, you may choose to make the thumbnails a little smaller.

Note: If the thumbnail slider is wider than the video player, the visitor can use the Prev/Next buttons to scroll through the additional videos.

3. Enter the URL of the YouTube Video
4. Alternatively, you can choose to upload your own video. Click on the plus button and click on the Upload Files link. As with uploading images, click on the Select Files button and navigate to the video that you wish to upload. The maximum upload size is 9 MB. The supported video types are MP4, WebM and Ogg.

After you've added all of your videos, you can drag & drop the videos to get them into the preferred order. Click on the Publish button to save your video gallery.

Edit Video Gallery

To edit a video gallery, select "All Galleries" from the Video Gallery menu. Hover over the gallery you wish to update and select Edit from the menu

On this page, you can:

1. Update the Gallery Name
2. Add a new video by clicking on the Add New button and following the instructions above.
3. Update an existing video by clicking on the pencil next to the video title.
4. Delete a video by clicking on the red trashcan next to the video title.

Make sure you click the Update button to save your changes.

Add Video Gallery to a Web Page



To add a video gallery to your web page, place your cursor in the location where you'd like your videos to be displayed and click on the Video Gallery Button on the toolbar. Select the Gallery name from the drop-down box and click the "Insert Shortcode" button. To preview the video gallery, you'll need to click on the Preview Changes button in the Publish box. The page will open in a new tab. To save your changes, make sure you click on the Publish/Update button in the right sidebar.

Adding a Single YouTube Video to a Web Page

To add a single video to a WordPress page:

1. Upload your video to YouTube.
2. Copy the URL from the top of the YouTube page (it should look similar to this with a different ending parameter: <http://www.youtube.com/watch?v=pzmishrWqiA>)
3. Paste the URL into your WordPress page where you want the video to display. You should be on the visual tab, not the text tab. It will not display the video in the editor. You'll need to click on the Preview Changes button to see the video. Click Publish/Update to save your changes.

Testimonials

To add testimonials to your web site, click on Testimonials in the left-hand navigation menu.

Add a Testimonial

To add a new testimonial, select “Add New Testimonial” from the left-hand navigation menu.

The screenshot shows the 'Add New Testimonial' interface. At the top, there is a text input field labeled 'Enter author name' with a green arrow and the number 1 pointing to it. Below this is a rich text editor with a toolbar and a large text area, with a green arrow and the number 2 pointing to the text area. To the right of the editor is a 'Publish' sidebar containing buttons for 'Save Draft', 'Preview', and 'Publish', along with status and visibility options. A green arrow and the number 3 point to the 'Set featured image' link in the 'Author Photo' section. A green arrow and the number 5 point to the 'Publish' button. At the bottom of the form, there is a 'Properties' section with two input fields for 'Title' and 'Company', with a green arrow and the number 4 pointing to the 'Company' field.

1. In the top box, enter the author’s name.
2. In the editor, enter the quote. Be sure to include quotation marks around the testimonial.
3. Click on the Set Featured Image to upload the author’s photo. The photo should be sized 120 pixels wide by 150 pixels high.
4. At the very bottom of the page, you can enter the person’s title and company name. These are optional fields.

The screenshot shows the 'Properties' section of the testimonial form. It contains two input fields: 'Title' and 'Company'. A green arrow and the number 4 point to the 'Company' field.

5. Make sure you click on the Publish button in the right sidebar to save your changes.

Edit a Testimonial

To edit a testimonial, select “All Testimonials” from the Testimonials menu. Hover over the quote you wish to update and select Edit from the menu

On this page, you can:

1. Update the author’s name
2. Update the quote
3. Update the author’s title and company name
4. Remove the author’s photo & add a new one

Make sure you click the Update button to save your changes.

Add a Testimonial to a Web Page



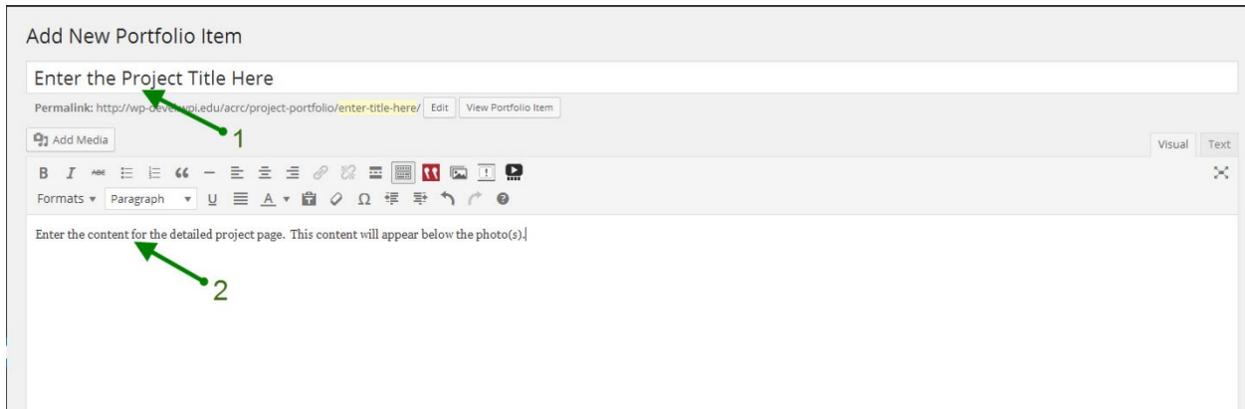
To add a testimonial to your web page, place your cursor in the location where you’d like your testimonial to appear and click on the Testimonial Button on the toolbar. In the pop up box, select the name of the person’s whose quote you would like placed on the page. Click on the Insert Shortcode button.

Project Portfolio

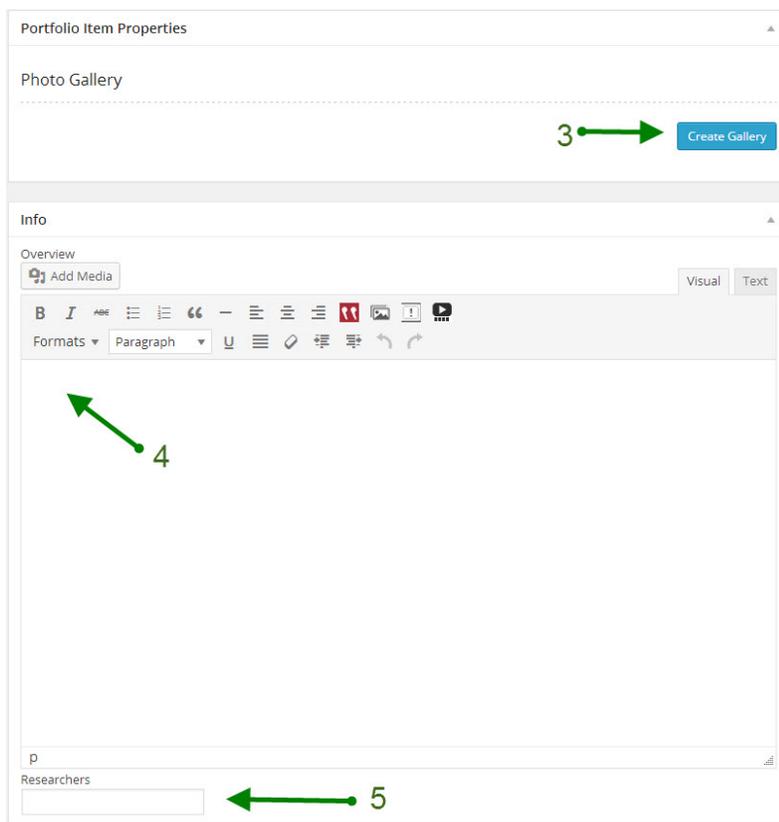
The Project Portfolio section allows you to showcase your projects. The project pages can be accessed from the Project Portfolio menu left-hand navigation.

Add a Project

To add a new project, select “Add New Portfolio Item” from the left-hand navigation menu.



1. Type in the project name at the top of the page
2. Add the project description into the editor. This will appear under the photo(s) on the detail page.



3. Click on the Create Gallery button to add photos. In the pop-up box, click on the Add to Gallery option on the left. You can either Drag & Drop photos or click on the Select Files button to navigate to the images for uploading. **The images should be 613 pixels wide.** Click on the Update Gallery button when all images have been uploaded.
4. Enter the Project Overview information into the “Info” box. This content will appear in the sidebar.
5. Enter the names of the researchers into the Researchers box.
6. Make sure you click on the Publish button to save your changes.

Edit a Project

To edit a project, select “All Portfolio Items” from the Project Portfolio menu. Hover over the project you wish to update and select Edit from the menu

On this page, you can:

1. Update the project’s title
2. Update the project description
3. Edit the Photo Gallery
4. Update the project overview text
5. Update the Researcher’s names

Make sure you click the Update button to save your changes.

Order Projects

If you’d like to change the order that your projects appear on the landing, click on the “Order” option under Project Portfolio in the left-hand navigation menu. Drag & drop your projects to re-arrange the order. Click “Update Post Order” to save your changes.

The Research Projects Web Page

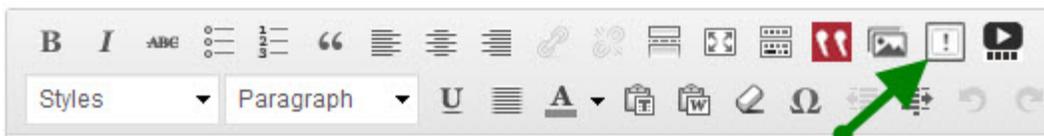
The Research Projects web page has a special template named “Projects Landing.” If you edit this page, it will appear to be blank. This is because WordPress is automatically generating the landing page and each individual project page from the content you’ve entered in the Project Portfolio section.

Highlight Box

The highlight box allows you to add a heading, image and text to a box as shown below:



To add a highlight box to your web page, place your cursor in the location where you'd like the box to be displayed and click on the Highlight Box Button on the toolbar.



A box will pop up where you can enter the content for the highlight box.

1. Add an optional heading
2. Upload an optional image
3. Enter the content for the highlight box
4. Click on the Insert Shortcode button

Highlight Box ✕

Insert Highlight Box

Highlight Box

Heading

Enter an optional heading 1

Image URL

Upload Image 2
Upload or enter an optional image URL

Content

Insert Shortcode 4 Cancel