



# WPI

WordPress Manual  
First Year Experience

May 18, 2015

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## Who should use this manual

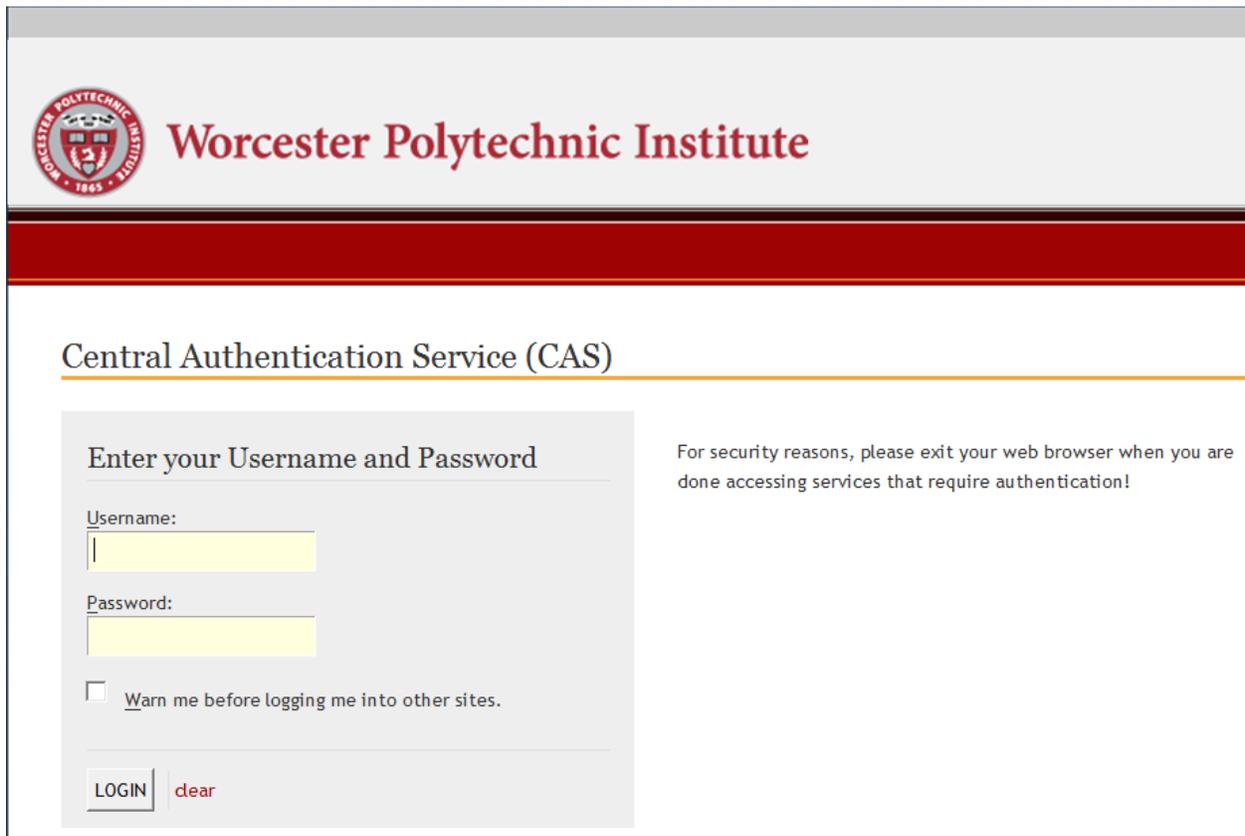
This document contains information specific to the FYE theme. This document focuses on the custom features of the theme and assumes that you are already familiar with the WordPress interface and basic WordPress functions such as editing web pages. If you haven't already reviewed the basic WordPress Manual, 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/fye/wp-admin>.

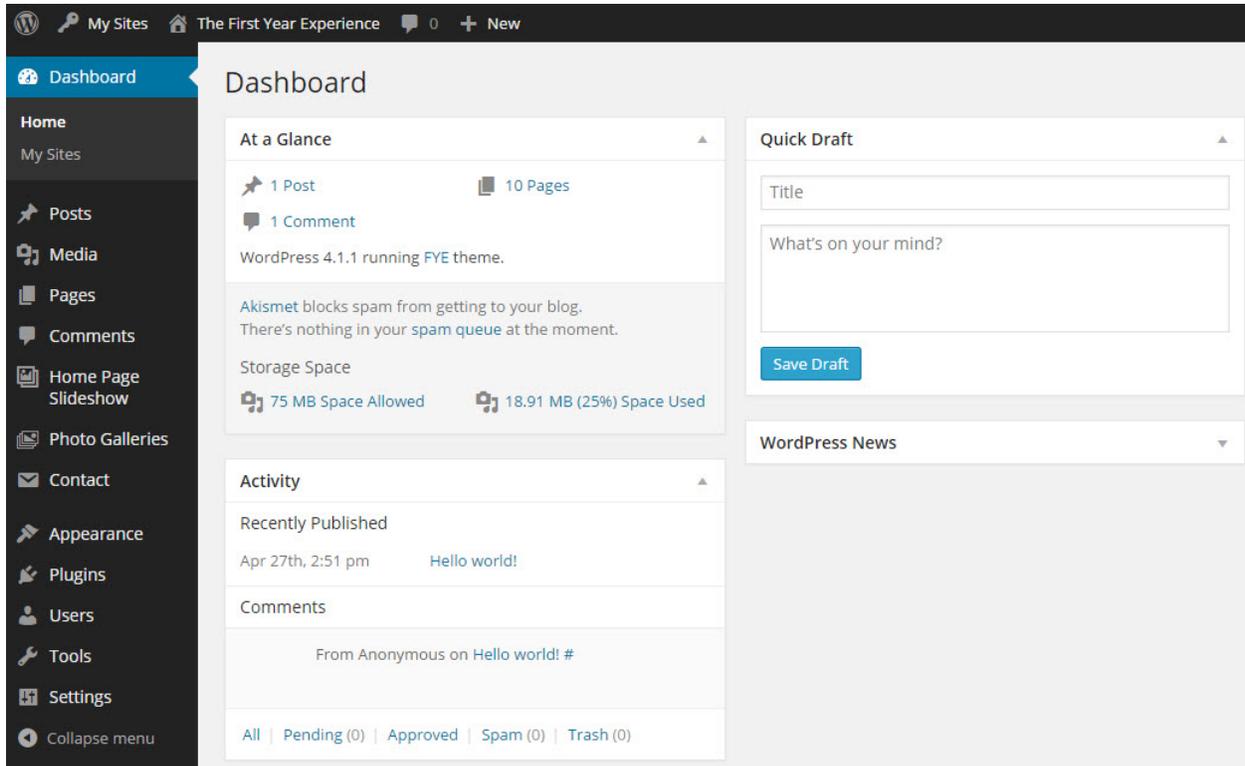
You will see the familiar WPI login screen as shown below. Use your WPI credentials to sign into your WordPress web site.



The screenshot shows the top of the Worcester Polytechnic Institute website with the logo and name. Below is a red horizontal bar. Underneath is the heading "Central Authentication Service (CAS)" with a horizontal line. The main content area is a light gray box titled "Enter your Username and Password". It contains two input fields: "Username:" and "Password:". Below the password field is a checkbox labeled "Warn me before logging me into other sites." At the bottom of the box are two buttons: "LOGIN" and "clear". To the right of the login box is a security warning: "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 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.

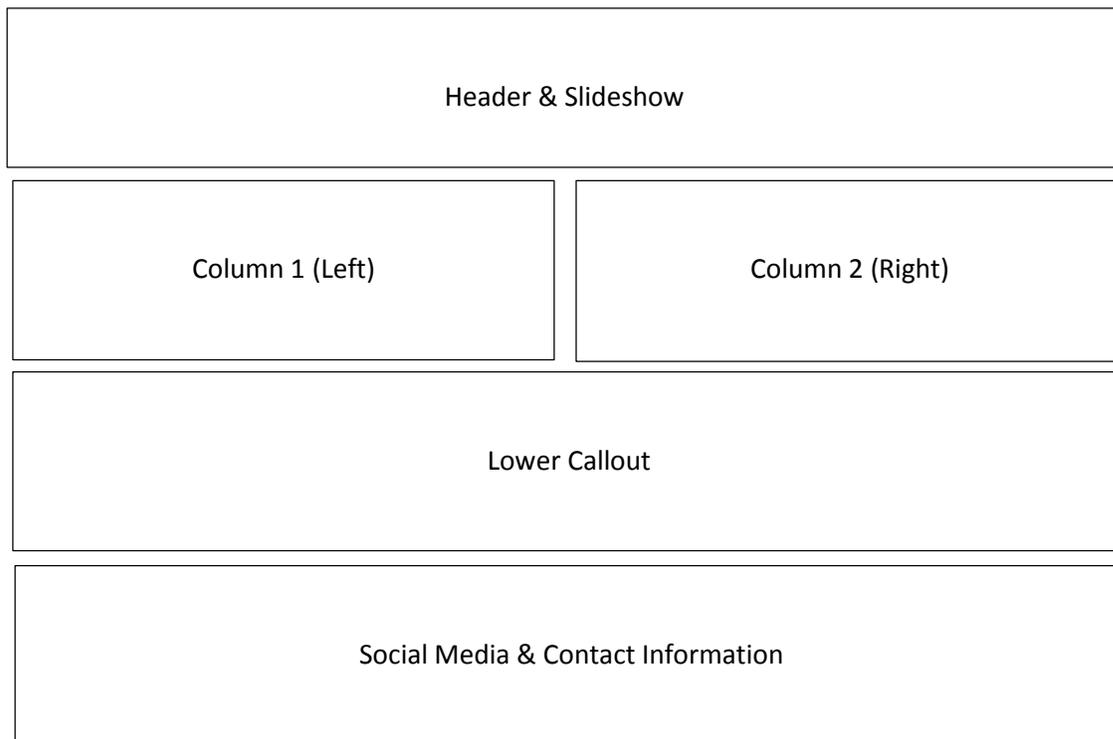
Below is a brief description of each of these sections:

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 (FYE was not designed for a blog)
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 – This is where you would go to modify your home page slide show
7. Photo Gallery – in this section you can upload photos to create slideshows
8. Appearance – this is where you manage your sidebar widgets, your menus, and your theme settings
9. Plugins – these are modules that allow you to add special functionality to your web site
10. Users – this is where you can grant access to new users or modify your profile
11. Tools – most users will never need any of the features under tools
12. Settings – this is where your WordPress settings are saved.

## The Home Page Layout

The home page was designed to address the needs of both newly enrolled students and existing first year students. In order to accommodate both audiences, the center of the page is divided into 2 columns. Two-thirds of the year, both columns will be used to address a single audience. However, during the January-April timeframe, one column is intended to direct the actions of the newly enrolled students and the other column will be focused on the existing students.

You will be able to customize the headings, content and call-to-action buttons as needed for each audience.

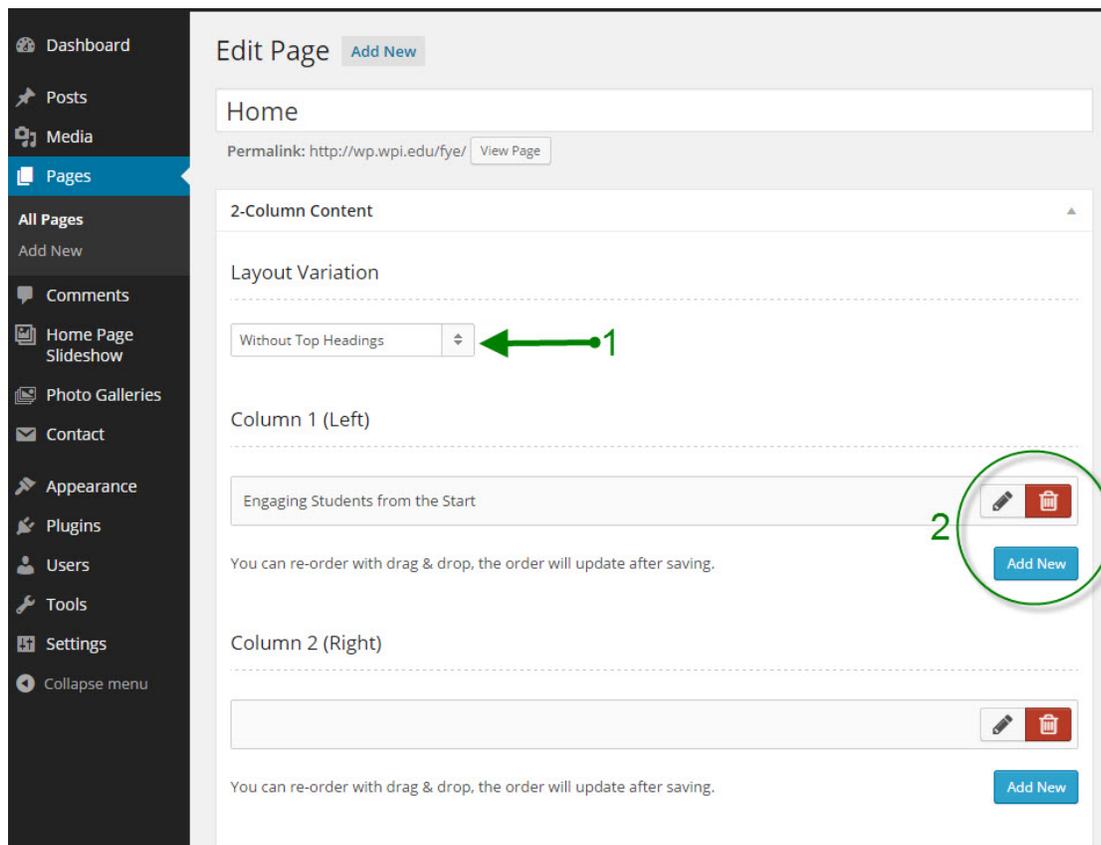


### Header & Slideshow

The header area contains the logo, menu and slideshow. The slideshow can be modified using the Home Page Slideshow section as described later in this document. Note that each slide can include text and a link to assist with directing students to the different sections of the website.

## The Left & Right Columns

1. At the top of the screen, under 2-Column Content, you'll see an option entitled "Layout Variation." This is intended for use during the time period where you will be addressing the needs of 2 different audiences. If set to "With Top Headings" you will be able to specify heading text for each column. During the rest of the year, when both columns will be addressing the same audience, this value should be set to "Without Top Headings."



2. Next to each column, you have 3 editing options
  - Edit the content (pencil icon)
  - Delete the content (trashcan icon)
  - Add new content (button)

When editing or adding new content, the screen will expand to display the fields as shown in the screenshot below.

- Title: This will be displayed in a larger font at the top of the column
- Content: This box contains the content to be displayed in the column.
- Heading Top: If you have "With Top Headings" turned on, you should enter a descriptive heading to this box to be displayed at the top of the column.

## Column 1 (Left)

Engaging Students from the Start  

---

Title

Engaging Students from the Start

---

Content

Visual Text

**B** *I* ABC                                   

## New Toolbar Icons

- **Toolbar Toggle** – The toolbar has 2 levels as shown below. If you are only seeing a single line of icons, click on the button outlined in red below to open the 2<sup>nd</sup> level of the toolbar for more options.



- **Icons** – The icons option allows you to select from a large number of icons that can be inserted into your web page as needed. First put your cursor in the editor where you'd like to insert the icon and then click on the button as outlined in red below. When the window pops up, click on the icon you wish to insert and it will automatically be added to the page.



- **Formats** – The formats button allows you to apply certain formatting codes to the content as described below. Before choosing a format, first highlight the text that should be affected.



The Formats drop-down menu includes the following options:

- Sub Title – makes your text larger and purple (see top of date pages)
- Heading Red – makes your text bold and red
- Indented List – indents the copy
- Gray Box – puts the selected text into a gray box with no border
- Playlist Caption – centers and bolds your text
- Icon Exclamation Triangle – places an orange triangle containing a white exclamation point in front of the text
- Icon Circle Checked – adds a circle containing a checkmark prior to the text
- Bold Link (not currently working) – will be removed in Phase II as it performs the same function as the standard bold icon in the toolbar
- Large Icon (Fontawesome) – highlight an icon prior to selecting this button. This option will increase the size of the icon and make it green.
- Suitcase Icon (Fontawesome) - adds a green suitcase icon prior to the text. Intended for use on the August Events and Orientation prior to the packing list.

## Re-ordering Content

Once the expiration feature has been added, you have the option to drag & drop the left & right hand content to organize the blocks as desired. This is just to suit your own preferences and does not affect how the content is displayed to the user. Note that only one block of content is displayed in each column and you cannot drag & drop content between columns.

### The Lower Callout Section

This is the content that is displayed beneath the left and right hand columns.

1. Enter Heading Text
2. Enter content with call to action links – this content floats to the right of the image
3. Click the blue plus sign to upload an image (or select one from your media library.) Click the red minus sign if you want to delete the image. The image will float to the left of the text.

Lower Callout

Heading

Get Connected

Text

Add Media

Visual Text

Paragraph

WPI resources at your fingertips. Download the **WPI app** and explore our interactive **virtual tour** — both providing expedient mobile access to campus services and information. Read the latest news. Be social. Learn more about the campus and nearby attractions. It's all in the palm of your hand.

- [Download the WPI app.](#)
- [Explore our Virtual Tour.](#)

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Image

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## Social Media & Contact Information

The footer area can be edited under the Appearance menu → Theme Options.

### Theme Options:

1. Footer Options – From the Footer Options tab, you can modify the following content
  - a. Facebook URL
  - b. Twitter URL
  - c. Instagram URL
  - d. Address and Contact Details
  - e. The heading above the contact form
  
2. Home Page Options – This tab allows you to control the following slideshow options
  - a. Pause Time – the time, in milliseconds, that a slide remains on screen (defaults to 5 sec)
  - b. Transition time – the time, in milliseconds, that it takes a slide to transition to the next

### Contact Form:

Your website uses a plugin called Contact Form 7 to generate the contact form in the footer of the page. Because this plugin requires HTML knowledge, it is recommended that you submit a helpdesk ticket to [WordPressHelp@wpi.edu](mailto:WordPressHelp@wpi.edu) for any changes to this form.

## Home Page Slide Show

From the left-hand navigation menu, click on the Home Page Slideshow. This page displays the images that have been uploaded for your home page slideshow.

### Add New Slide

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

### Add Slide

**Slide Properties**

**Image**

+

**Caption**

**Caption URL**

Optional

1. In the top box add a title for your slide – this is for your reference only and will not be displayed on the slide show
2. Click on plus sign to add an image. A new window will pop up where you can either select an existing image from your media library or upload a new one. **IMPORTANT:** **IMPORTANT:** Images should be sized to **1400px wide by 579px high** before uploading.
3. Once the image has been selected, click on the blue button “Send to OptionTree”
4. You can add an optional caption which will be displayed on the photo
5. If you add a caption, you can also add an optional URL linking the text to a page on your website.
6. 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 remove the old photo, click on the red minus sign next to the image.
3. Follow instructions above for adding a new slide.
4. 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.



- The second tab identifies the date buttons. Here you can change the text on the buttons and the page to which each button links.

Timeline to Campus Page Details

Splash

Date Buttons

Yellow Button - Label

Prior to May

Yellow Button - URL

http://fye-test.wpi.edu/timeline-to-campus/prior-to-may/

Green Button - Label

By May 31

Green Button - URL

http://fye-test.wpi.edu/timeline-to-campus/by-may-31/

## Date Pages

Each of the date buttons on the timeline page is associated with a date page. When editing these date pages, you'll notice that the top editor actually contains the content to be displayed at the bottom of the page, below the icons and their related content.

By May 31

Permalink: <http://wp-devel.wpi.edu/fye/timeline-to-campus/by-may-31/> Edit View Page Get Shortlink

Add Media Visual Text

**B I ABC** [List icons] [Link icon] [Image icon] [Table icon] [Icons] Formats

Paragraph [Link icon] [Image icon] [Table icon] [Icons]

[callout\_box]

**Reminders & Tips**

Freshmen Welcome Events: Watch for your email invitation for registration details!

[Check email](#) regularly.

[[callout\_box]]

[step\_note color="blue" label="By June 30" url="http://fye-test.wpi.edu/timeline-to-campus/by-june-30/"]

You don't need to wait to complete more steps. Move onto tasks due by June 30.

[/step\_note]

P

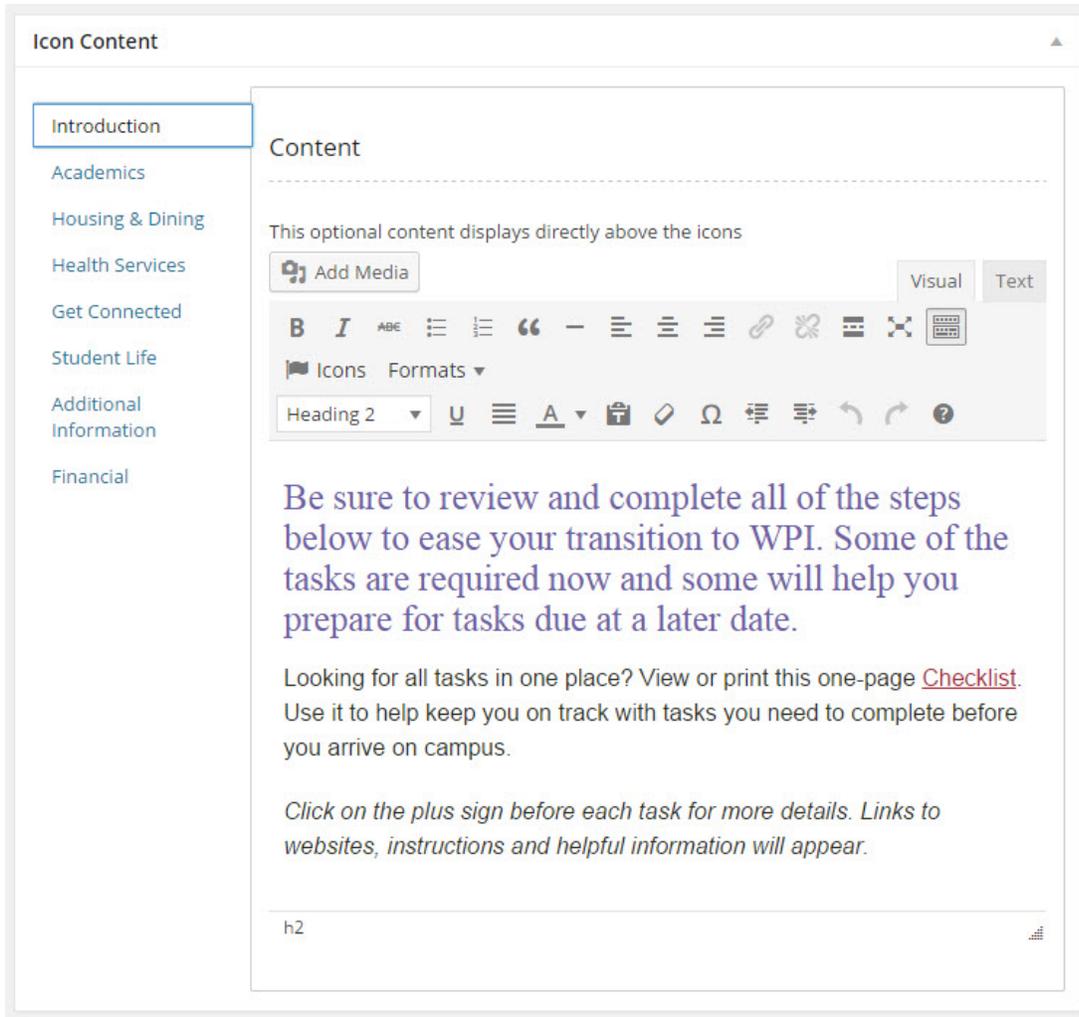
Word count: 40 Last edited by egallagher on April 30, 2015 at 3:27 pm

Please refer to the [shortcodes section](#) at the end of this document for some of the formatting options that can be used to make important information in this bottom section stand out. In the example at the left, a callout box is used for Reminders & Tips. Also, each of the date pages uses a [Step Note](#) shortcode to encourage the user to move onto the next step in the process.

The bottom section of the date pages contains the bulk of the page information. Each tab at the left represents one of the icons to be displayed at the top of the page. The only exception is the introduction tab, which contains the introductory text above the icons.

The icons are displayed automatically based on the content that is provided. If there is no content on a tab, that icon will not display. Note that the tab order does not reflect the order displayed on the web site. The icons are displayed in the same order on every page for consistency.

Some of the frequently used shortcodes sections include 2-columns, border boxes and accordions. [Shortcode descriptions](#) can be found at the end of this document.



## Date Buttons

At the bottom of the date pages, there is a button menu that allows the user to easily move from one date page to another. These buttons are defined under the Appearance→Menus section of the admin. **Use caution** if you need to modify these buttons. Removing a button from this menu affects all of the date pages. This menu also determines the appropriate formatting for each button -- any changes could inadvertently affect the look & feel of the buttons.



## Photo Gallery

The Photo Galleries menu allows you to create slideshows to be used on your web pages, blog posts, and even in the sidebar.

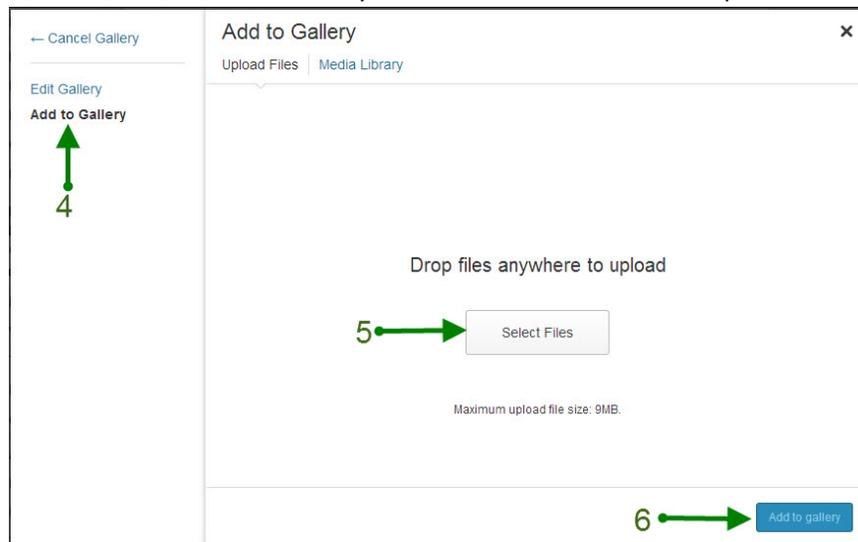
From the left-hand navigation menu, click on Photo Gallery.

### Add New Gallery

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



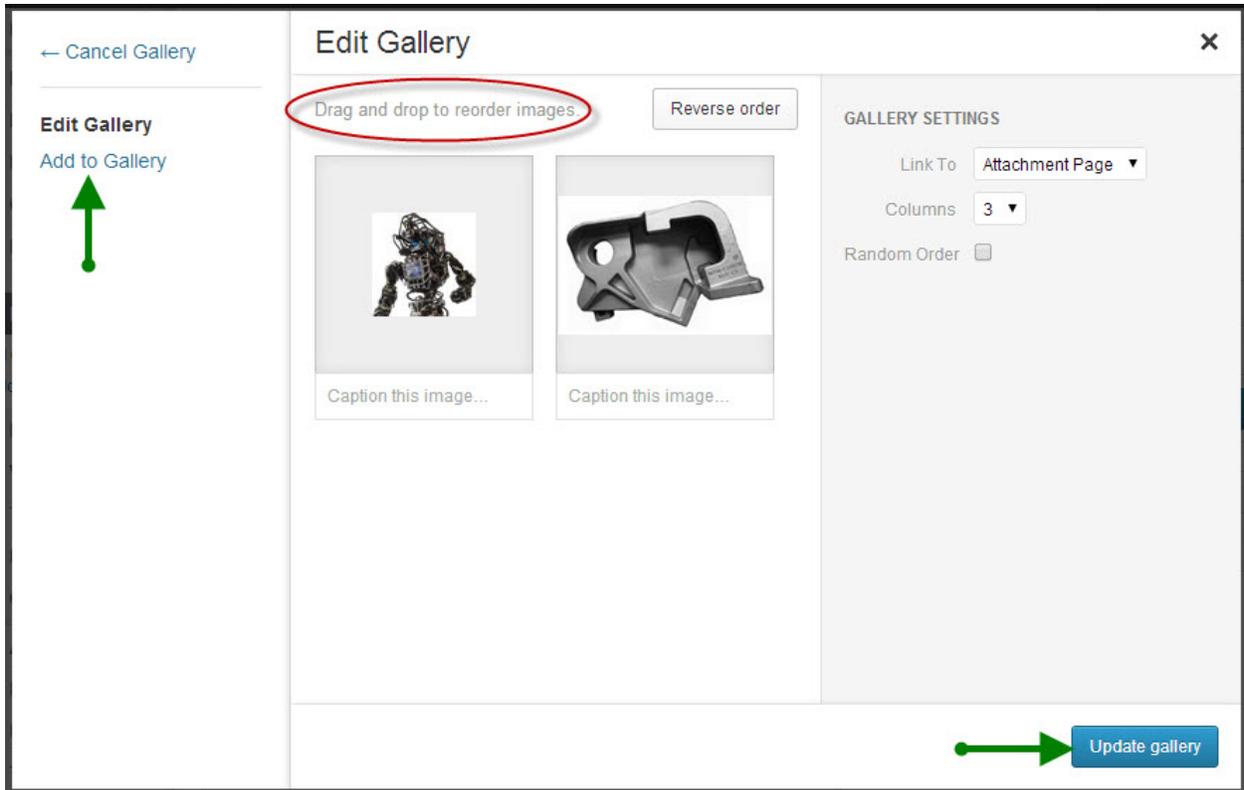
2. Enter a title for the photo gallery. This does not appear on the web site but will help you to identify your different photo galleries.
3. Click on the Create Gallery Button. A new window will open.



4. Click on Add to Gallery. Verify that you are on the Upload Files tab & not the Media Library tab.
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.

## 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 a page, use the [Photo Carousel Shortcode](#) as described in this document.

## Adding a YouTube Video to a Web Page

To add a 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. Click Publish/Update to save your changes.

## Important Shortcodes

Shortcodes allow us to add formatting to our content that is interpreted by WordPress when it displays the web page.

### 2-Column Shortcode

Use the 2-Column Shortcode to divide your page content into 2 equal width columns. The left column content should be surrounded by the text `[half]` and `[/half]` as shown below. This tells WordPress where the first column begins and ends. The right column is surrounded by `[half_last]` and `[/half_last]`. See the example below:

```
[half]
Content in the first column.
[/half][half_last]
Content in the second column.
[/half_last]
```

### Callout Box Shortcode

To add a callout box to your page, as shown below, use the `[callout_box]` shortcode.

---

#### Callout Box Shortcode

The `callout_box` shortcode can be used to create callouts just like this one.

---

The content should be placed between the `[callout_box]` start and end tags and can include html formatting as shown below.

```
[callout_box]
<h2>Callout Box Shortcode</h2>
The callout_box shortcode can be used to create callouts just like this one.
[/callout_box]
```

## Border Box Shortcode

The border box shortcode adds a light gray box around the content as shown below.

**BB 2040. PRINCIPLES OF ECOLOGY.**

*Cat. I*

This course is designed to give the student a basis for understanding the abundance and distribution of plants and animals from the level of the individual to that of the ecosystem. Topics may include population ecology, competition, community ecology, patterns of species diversity, and energy flow.

Recommended background: BB 1045, and MA 1021-1022

Like the other shortcodes, the content in the box should be placed between the [border\_box] start and end tags. As shown below, this shortcode contains an optional “align” attribute, which could be set to either “left” or “right” to align the box in that direction. For example:

```
[border_box align="right"]  
  
Sample content to appear in the bordered box. This box will be right  
aligned to the rest of the content due to the align attribute.  
  
[/border_box]
```

## Step Note Shortcode

At the bottom of each of the date pages, there is a button & some bold text instructing the user to take the next step (an example of which is displayed below.) This is done using the step note shortcode.

**Return to the timeline to campus to finish  
any incomplete enrollment requirements.**



This shortcode takes a few parameters as described below:

- **color** – Changes the color of the button. Accepts “yellow”, “purple”, “blue”, “green”, “yellow2”, “black” (defaults to “yellow”)
- **label** – Change the button label (defaults to “See Next”)
- **url** – The page URL that the button is linked to.

As you can see below, the text that appears to the left of the button should be placed between the [step\_note] start and end tags.

```
[step_note color="purple" label="By July 31" url="google.com"]  
  
Return to the timeline to campus to finish any incomplete  
enrollment requirements.  
  
[/step_note]
```

### Accordion Shortcode

The accordion shortcode allows content to be hidden below a clickable heading element. When the heading is clicked, the content below is revealed. For example, when the user clicks on the arrow next to Categories, hidden content is revealed. If they click on the arrow again, the content will be hidden.

- Course Numbering**
- Course Registration Number**
- Categories**
  - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin semper ac ipsum vitae varius. Proin auctor sem nec tincidunt accumsan. Sed varius volutpat nunc ac molestie.

- Background**

The accordion shortcode accepts a “label” attribute which is displayed to the right of the arrow. If no label is specified, the text will default to: “Expand to learn more”. The text between the [accordion] tags is the content that will be initially hidden.

```
[accordion label="Categories"]  
  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin  
semper ac ipsum vitae varius. Proin auctor sem nec tincidunt  
accumsan. Sed varius volutpat nunc ac molstie.  
  
[/accordion]
```

### Photo Carousel Shortcode

This shortcode allows you to place a photo gallery in a page. It requires the post “id” of an existing photo gallery. When you edit a photo gallery, the post id is displayed in the URL. To add a photo carousel to a web page, use the following shortcode with the appropriate ID. Note that there is no ending shortcode.

```
[carousel id="101"]
```