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Who should use this manual

This document contains basic information for editing a WordPress web site and pertains to anyone who is an Administrator of a WPI Project Center web site.

Signing into WordPress

To access the login page in WordPress, click on the Login link in the top right corner of your web page. You will see the familiar WPI login screen as shown below. Use your WPI credentials to sign into your WordPress web site.

Important: If you have another domain for your web site, you must use the http://wp.wpi.edu domain for editing the site. This is where your web site physically resides and your other domain just points to this location.

To access the login page go to: http://wp.wpi.edu/your-website-name-goes-here/wp-admin.
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 WordPress stores blog articles. The Project Center web sites were not set up with 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. Slideshow – your theme is set up to have an optional slideshow on the home page. This is where you would go to create the slideshow.
6. Comments – if you have a blog & comments are turned on, this is where you would go to moderate your comments.
7. WPZoom – This is where some of the settings for your theme are located.
8. Appearance – this is where you manage your sidebar widgets, your menus, and possibly your theme settings (depending upon the theme).
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 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!)
12. Settings – this is where your WordPress settings are saved.
WordPress Settings
Please use caution when making any changes to the sections beneath the Settings Menu. Although some changes may be minor, others could adversely affect the functioning of your web site.

Web Site Branding
On the General Settings page, the site title should be set to the name of your project center and the tagline should be set to Worcester Polytechnic Institute. This was set up prior to your site going live and should not be changed unless the name of the project center changes. Please do not make any modifications to the tagline field.

Adding & Editing Web Pages

Click on [Pages] in the sidebar menu to access your web pages.

The Pages Screen lists all of your existing pages.

➤ If you hover over the title of a web page, a menu will appear beneath the title that allows you to: Edit, Quick Edit, Trash or View.

  Edit will bring you to the WordPress editor so you can make changes to the page
  Quick Edit allows you to modify some of the parameters for this page, but not the content
  Trash will delete the pages (note that it goes into the trash & is not permanently deleted)
  View allows you to view the web page

➤ To add a new page, click on the “Add New” button at the top of the page OR from the left Navigation menu.
Whether you are adding a new web page or editing a page, the process is exactly the same.

1. First you add a title for your web page. It’s important to create a meaningful title to make it clear to your readers and the search engines what this page is about.

2. Then you add the content to the text editor.

3. Under Page Attributes in the right sidebar, you must specify a parent page for all sub-menu items. WordPress will automatically build the left-navigation menu based on the parent/child relationship specified here. For Students, make sure you set the page parent to your project’s main page.

4. Make sure you press the Publish (or Update) button to save your changes!

Note: New top-level pages and drop-down menus need to be added by an Administrator (see section on updating menus).

How to determine which page is your Home Page

Unless it is named Home, it is not always obvious which page is your home page. You can find out this information under Appearance > Widgets. In the right column, look for the section entitled "Homepage: Main" and expand it using the down-arrow. Then expand the “WPZOOM Single Page” widget to see which page is selected as the “page to display.”
Permalinks

The URL of each page is called a Permalink. You can see the URL beneath the page title in the WordPress editor. You can click on the Edit button next to the URL to change it.

**Note that WordPress URLs cannot end in all numbers.** So you can’t use a class year such as “2014” for your permalink. You must include a letter or a dash (i.e. yr-2014) or WordPress will automatically add a “-2” to the link, resulting in a URL that looks like this: http://wp.wpi.edu/projectcenter/2014-2/.

Page Width Limitations

It is important that the images, tables, and other content that you upload to your web pages fall within the width limitations of the page body. Because the left-hand navigation menu takes up roughly one-third of the page width, that leaves 600 pixels for the body width. Make sure that you do not upload images or tables that are wider than 600 pixels, otherwise they will wrap beneath the menu where there is more room.

Note that if you are copying content from an existing web site, you can open 2 different browser windows and copy text from your old web site to your new WordPress site. However, be very careful not to copy images, tables and other content that will exceed the page width limitations and break your web page formatting.
The WordPress Editor & Toolbar

Below is a close-up of the toolbar at the top of the WordPress editor. If you are only seeing one row of icons, click on the “show/hide kitchen sink” button that is circled in green below.

Most of these buttons should look very familiar. Just like Microsoft Word or any other word processing program, you can add bold text, italic text, bullets, numbered lists, etc. just by clicking the buttons in the toolbar.

A few “new” icons that you may not have seen before are:

These 2 chain link icons are for creating & removing hyperlinks. These buttons are grayed out until you highlight a word that you want to format. You can click on the first icon if you want to create a new hyperlink. This could be to another page within your web site or to a page on another web site. A box will open up allowing you to specify the link. If you are linking to a different web site, make sure you click on the button that says to open the link in a new window. If you want to remove a link, just put your cursor on an existing hyperlink and click the broken link icon.

This toggle button will allow you to paste in plain text mode which will remove all formatting. You do not need to turn this on if you are pasting from Microsoft Word. The default editor will retain the basic formatting (bold, bullets, etc.) from Word but will remove all of the extra code Microsoft uses to make your documents look pretty, since this extra code can cause problems for your web site.

The Add Media button allows you to upload photos and documents to your web page (see section on Adding Photos and Documents to the Media Library).

On the far right side of the editor you’ll notice 2 tabs at the top: Visual and Text. Most people should only use the Visual Tab. If you are seeing HTML code in the editor, you are probably in Text Edit mode and need to change tabs. Unless you are very comfortable editing HTML code, I recommend that you only use the Visual Tab.
Adding Photos and Documents to the Media Library

If you click on Media in the left navigation menu, you will see all of the photos that are on your web site and possibly some documents. You can click on the “Add New” button at the top of the Media page or choose “Add New” from the left-hand menu, but it is usually easier to just upload documents and images while you are editing a web page or blog post. Everything that you upload into WordPress is stored in your Media Library and can be re-used as needed.

When editing a web page or blog post, you’ll notice the “Add Media” button directly above the WordPress editor.

Uploading Images
When you click on the Add Media button, it will open up a window that allows you to either select a photo from the Media Library or Upload a new file. Notice the 2 links at the top of the page that lets you indicate where you want to select the photo from.

If you want to upload a photo from your computer, click on the Upload Files link and then the Select Files button. Navigate to the photo you want to upload. Once the file has been uploaded, you are given a few options to choose from before inserting the image into your page. You can choose the photo alignment in relation to the text (left, right or centered); you can choose to link the photo to a URL (note that the default link is to the photo itself – which I usually delete); and you can select the image size. You can also add a caption and some meta data (description and alt text) to the photo.

Uploading Documents
The process is pretty much the same for uploading a document. Click on the “Add Media” button. Click the link to “Upload Files.” Navigate to the file you want to upload and click Open. The file will be uploaded to your web site. Before clicking on the button to “Insert into Page,” change the Title text to whatever you would like the link to say on your web page.
Updating your Web Site Menus (Administrators Only)

When you add a new page to your web site, you will need to update the web site menu. From the Appearance Menu, select Menus. This will bring you to a page as shown below.

1. At the top of the page, select the menu that you would like to edit. Note that your web site may only have one menu.
2. From the Pages section on the left, check the box next to the page you want added to the menu and click the “Add to Menu” button.
3. The new page will be added to the bottom of the menu structure. You can use your mouse to drag the new page to a different location in the menu. If you drag it below and to the right of another web page, it will create a drop-down submenu. You can also expand each of these menu items and adjust settings, such as the Navigation label.
4. When you are finished, make sure you click the “Save Menu” button to save your changes and make them live on the web site.

**Important:** You want to use the **Pages** section to add pages to your menu and not the Links section. Both will allow you to add web pages to your menu, but Pages will link the menu to the page ID instead of the page URL. If someone changes the URL, the page IDs will continue to work but page URLs will break.

**Exception:** Because this theme requires that the front page be set to your latest posts, it does not recognize the home page ID as being the same as the “front” page. When adding your home page to the menu, you will need to use the Links section and add the link to your home page.
Menu Settings
At the bottom of the Menus page, there are some Menu settings. We do not recommend that you check the box to automatically add new top-level pages to this menu. Because your main menu can only fit about 8 or so options across the top, you do not want users to inadvertently add new top level pages because it will cause your menu to wrap. This means that an administrative user will need to add all new pages to the menu, allowing you full control over your top-level menu and all sub-menus.

Links
You can also use WordPress menus to create a list of related web site links. Create a new menu and use the Links Section at the left to add URLs. After saving your menu, go to Appearance -> Widgets and add a Custom Menu widget to your Sidebar. Expand the widget and select the new menu that you created. See the following section for more information on using widgets.
Sidebar Widgets

Most of the content that you see in your sidebar is contained in what’s called a Widget.

From the Appearance Menu, select Widgets.

On the left side of the screen are the available widgets you can use in your sidebar. On the right side of the screen are the sections of your web site that you can drag widgets into.

Although there are numerous sidebar sections installed with this template, only 3 are being used:

1. Sidebar – This is the left sidebar on your interior pages. This sidebar contains your left-hand navigation menu, the search box, and any other widgets that you install
2. Homepage: Main – this determines which page contains your home page content
3. Homepage: Right of Main - This is the right sidebar on the home page. It contains the search box and some optional image widgets

Frequently Used Widgets

Text Widget
The most commonly used widget is the text widget. Although the text widget can be used for just plain text, it is often used for both text and HTML code. If you are not familiar with HTML code, be careful when you are editing your text widgets. One small error in a sidebar can break the code for the entire web page.

Image Widget
Another useful widget is the image widget, which can be used to add an image with a title and description.

Custom Menu Widget
As previously discussed, the custom menu widget can be used to add a list of links to your sidebar.
Slide Shows

The Venture theme that your web site is based on has several slide show options as described below.

Home Page Banner Image & Slide Show

Whether you want just a simple banner image or a slide show on your home page, the process is exactly the same. Click on Slideshow from the sidebar menu. On this page you can either add a new slide or edit an existing one.

Add: To add a new slide, click Add New from the left navigation bar or at the top of the page.
Edit: To edit an existing slide, hover over the slide name and click the Edit link.

1. Add a title to the slide (optional.) This is the larger text that appears on the slide. If you do not want any text on the slide, you can leave this field blank.
2. Click Add Featured Image and upload your photo. The program will resize your image to 1014 pixels wide by 279 pixels high. You may want to size the photos yourself before uploading to control the quality.
3. Add subtitle text to the body editor. This is the smaller text on the slide. You want to keep it short – the visitor only has a few seconds to read it. Keeping it to under 70 characters will also prevent the text from wrapping.
Note that you do not have to have multiple slides. If you choose to have only a single slide, it will appear as a static image on the page.

After completing the above steps, if you still do not see a photo or slideshow on your home page you need to adjust some of your web site settings.

1. First check to make sure that your home page is set to your latest posts: Under Settings -> Reading, make sure the top radio button is selected for “Front page displays your latest posts.” You do not want to set a static home page for this theme if you are using a slide show or even just a banner image.

2. Click on the WPZOOM menu. This page appears to be a page within a page as shown below:

   ![WPZOOM menu](image)

Click on the Homepage menu. Make sure the checkbox for “Display the slider on homepage?” has been checked. On this page you can also adjust other settings, including:

- Autoplay slider (so that it starts without user interaction)
- Slider interval in milliseconds
- Slide effect: Slide or Fade
- Number of images

Make sure to click the “Save all Changes” button when you are done.
Adding a slide show to a web page

Follow the steps below to create a slide show similar to the one at the right.

1. Edit the page where you want to add a slide show and click the Add Media button.

2. A new box will open up. Click on the tab to Upload Files. You can either click on the “Select Files” button and navigate to the photos you wish to upload OR just drag & drop your photos into the box. These photos will become your slideshow.

Note that you must upload the images for the slideshow to the page you are editing. You cannot use existing photos from your media library.

ALL photos uploaded to this page will appear in the slideshow.
3. Once the images are uploaded, they will be displayed on the media library tab. As you click on each photo, you'll notice that the information in the right pane changes to display details about the selected photo.

In this pane, as shown to the left, you can enter in an optional title and description for each photo. This information will be displayed beneath the photo if you select the captions option (see below.) Note that the title field defaults to the file name, so you should either change or delete this value.

4. **Important:** When you are done editing, do not insert the photos into the page. Just click on the “x” in the top right corner to close the box.

5. Put your cursor in the editor where you want to place the slide show and then click on the WPZOOM Slideshow Shortcode” button circled in red in the screen shot below.

This will pop up a window with your slideshow options:

- Autoplay Slideshow
- Slide Interval in milliseconds
- Slideshow Height (in pixels)
- Transition Effect (Fade, Slide or Flash)
- Lightbox (Yes or No)
- Captions (Yes or No)

After you click on the “Insert Gallery” button, you will see the wszlider shortcode similar to the one highlighted in purple above. The parameters may vary depending upon the options you selected. You will not be able to view the actual slide show in the editor. You must click the preview or publish button to see your slide show. Make sure you click the update button to save your changes.
Users

New Users: Creating an Account

1. First time users must click on the LOG IN link at the top of the main WordPress page:  
   http://wp.wpi.edu/
2. Log in with your WPI username and password.
3. After logging in, notify the administrator so they can add you as a user to the web site.

Administrator: Adding Users

Once a user has logged in, they will be added to the global WordPress users list. To add them to your site:

1. Click on the Users menu from the left-hand navigation bar.
2. Click on the “Add Existing” button at the top of the page.
3. Enter the user’s email address into the box and select the appropriate role:
   - Administrator – somebody who has access to all the administration features within a single site.
   - Editor – somebody who can publish and manage posts including the posts of other users.
   - Author – somebody who can publish and manage their own posts.
   - Contributor – somebody who can write and manage their own posts but cannot publish them.

Students are usually assigned the role of Editor.

Note: If the user’s email address does not appear in the email box as you are typing, that indicates they have not yet logged into the WordPress System (see above - New Users: Creating an Account.)

Videos

To add a video to a WordPress page, follow these 4 steps:

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
4. The full size video may be too wide for the page, especially if it is placed at the top of the page next to the left navigation menu. If necessary, you can adjust both the height and width by surrounding your video link with an [embed] shortcode as shown below.

   [embed width=”600” height=”500”]http://www.youtube.com/watch?v=pzmishrWqiA[/embed]

Remember: The width limitation is 600 pixels for the area to the right of the left-hand menu.
Theme Color Options

Your theme comes in 6 different colors. To change the color of your web site, go to Appearance -> Spectrum CSS and select the desired color. The options are:

1. Cranberry
2. Green
3. Blue
4. Burnt Sienna (Brown)
5. Eggplant (Purple)
6. Black

Team Profile Page

The Project Center web site has a special template designed to showcase the members of your project team as shown below:

On this page you can add photos, names, and some optional information such as project role, web site URL, twitter name and a brief description. Although you can display different size images as shown above, it will look more uniform if all photos are the same size.

Activate Our Team Plugin

If you do not see Team Members in the left hand navigation, you need to first activate the Our Team Plugin. Go to the plugins page, scroll down to “Our Team” and click Activate.
Adding Team Members
The first step in creating a team page is to add your team members.

1. Click on the Team Members option in the left navigation
2. Select Add New
3. Enter Team Member’s Name
4. Set Featured Image – click to upload Team Member’s Photo [Recommended Size 300 pixels square]
5. Enter any optional information you want to enter (you should be consistent for all team members)
6. Enter a very brief description (optional)
7. Select a category (optional) – see more about categories below
8. Click the Blue Publish button to save your changes.

Important: To ensure a consistent page layout, you should use the same photo size and descriptive information for all members.

Updating Team Members
1. Click on the Team Members option in the left navigation
2. Hover over the name you wish to edit and click the Edit link
3. Follow the instructions above for Adding a Team Member
Creating a Team Page

Once you’ve added your Team Members, you’ll need to go to the Pages menu to create the Team Page.

1. Click on Pages → Add New
2. Add your page content (see section on Adding & Editing Web Pages)
3. In the Page Attributes box in the sidebar, choose the Team Template
4. Click Publish

This will automatically put all of your team photos beneath the content on the page.

Putting Team Members in a Sidebar Widget (Administrators Only)

Team Members can also be added to a sidebar widget.

1. Click on Appearance → Widgets
2. On the right side of the page, click on the down arrow next to “Sidebar”
3. Find the text widget in the center and drag it over into the sidebar
4. Add this short-code to the text widget: [woothemes_our_team]
5. In the drop-down box, make sure you select the option “Show on checked pages”
6. Check the box next to the page where you want the team to display in the sidebar
7. Note that it also give you an option to enter a post ID for any page or post. The easiest way to find a page or post ID is to edit the page. The id will be displayed in the URL at the top of your browser as shown in the image below. In this case the post id is 197.

Using Categories (optional)

If you have more than one team, you can use categories to distinguish between the teams. From the Team Member menu, select Categories. Give each Category a distinct name, with an optional parent category and an optional description. Click Add New Category. Now when you are adding new team members, you can choose the appropriate Team Category. The benefit to this is that you can use a short-code in a web page to display a single category – so that you can create separate team pages. The short-code should look like this:

[woothemes_our_team category=”71401”]

Just like pages & posts, the categories are given a unique id. The best way to find the id is to edit the category. The tag_ID will be display in the URL as shown in the image below.