WordPress Manual

For Labs

October 1, 2018

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Who should use this manual

This document contains information specific to the WPI Lab 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 are not familiar with WordPress, please review the videos at https://www.wpi.edu/+wordpress.
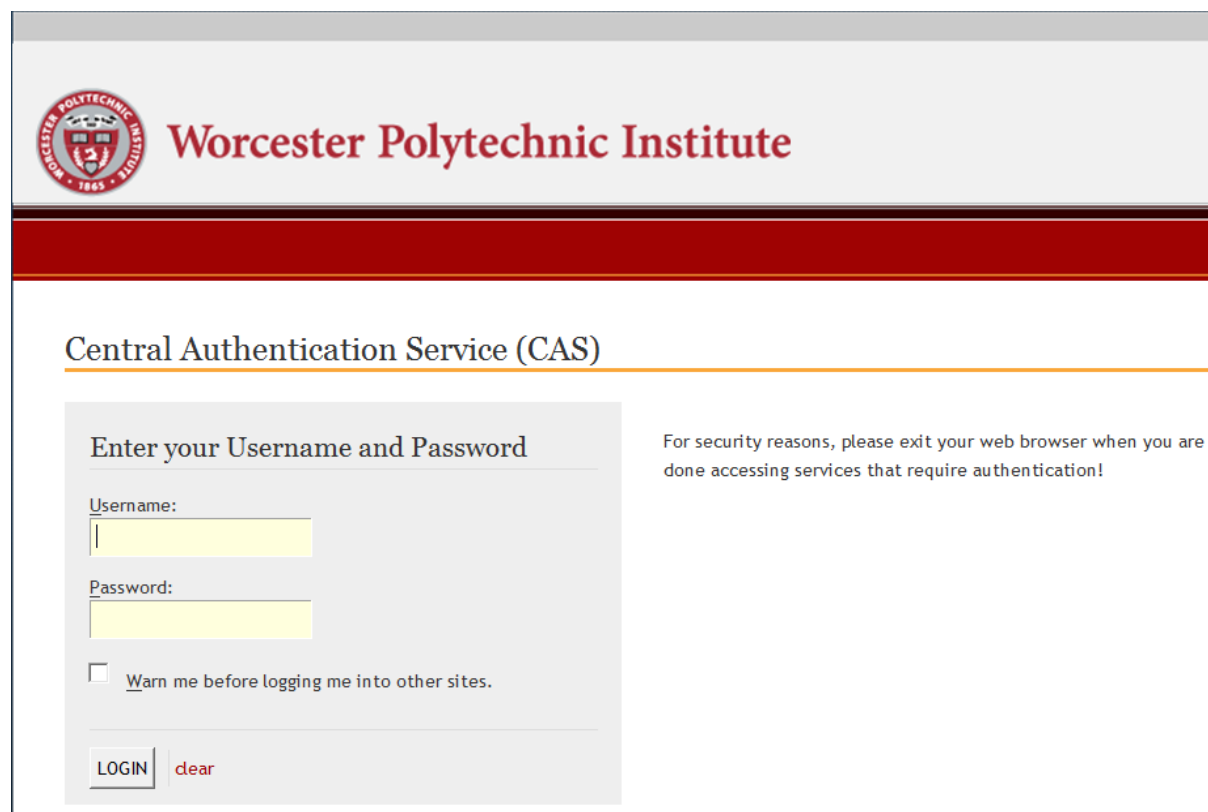
IMPORTANT: Some of our WordPress labs are on the **labs.wpi.edu** server and others are on the **wp.wpi.edu** server. The instructions are mostly the same for both servers, with the exception of logging in and adding users. The "IMPORTANT" label will be used to identify where the instructions differ.

Signing into WordPress

IMPORTANT: If your lab website begins with **https://wp.wpi.edu**/labname , please see the instructions on this page for logging into WordPress.

To access the login page in WordPress, add "/wp-admin" to the end of your web site name. For example: http://labs.wpi.edu/your-lab-name-goes-here/wp-admin.

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

Team Members

The Team Members menu allows you to create bios for your team members and add them to a page where they will be nicely formatted similar to the image below:
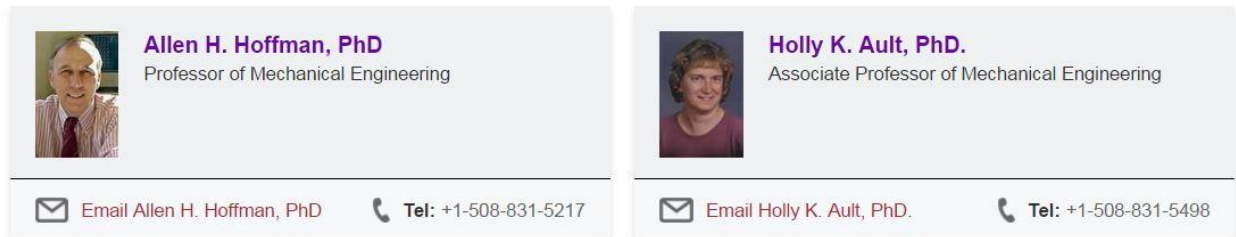
From the left-hand navigation menu, click on Team Members.

Add New Team Member

1. To add a new team member, select "Add New" from the left-hand navigation menu.

2. Enter the team member's name into the title box at the top.
3. Enter the team member's bio into the main editor box.
4. Enter details such as role (title), email, phone, twitter username, etc. These fields are all optional.
5. Click on "Set featured image" in the right sidebar to upload the team member's photo. The team member photos should all be the same size for a consistent layout. **The recommended image size is 100x100**.
6. Click the publish button to save the team member's bio.

Creating the Team Page

Once you've created a profile for each member of your team, add a new page under the Pages menu. In the right column under Page Attributes, select the Template: **Our Team**. WordPress will generated the content for this page. You do not have to add any additional content; however, if you would like to add an introductory paragraph, it will be displayed above the team profiles. Publish the page to make it live on your website.

Edit a Team Member

To edit a team member's bio, select "All Team Members" from the Team Members menu. Click on the name of the person you wish to update. The layout for the edit page is exactly the same as the add team member page.
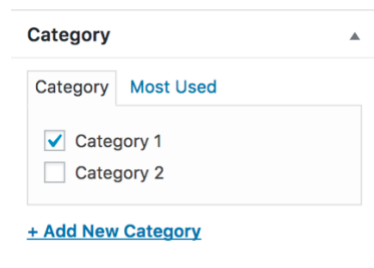
On this page, you can:

1. Update the member's name
2. Update their bio.
3. Change their photo:
   a. Click "Remove featured image" link to remove the old photo.
   b. The text will change to "Add featured image" – click this link to upload the new image.
4. Update other details such as role, email, phone or twitter username.

Make sure you click the Update button to save your changes and make them live.

Team Shortcode

The Our Team plugin comes with an optional shortcode that allows you to put your team members into different categories and customize the look of the page. Beneath the Publish button, there is a box (shown below) where you can select the appropriate category. Create categories by clicking on the Add New Category link. Example categories may be Faculty, Graduate Student, Undergraduate Student, etc.

The following shortcode can be put into a page to display a specific category. You may want to add a heading above the shortcode. For example:

Faculty

[woothemes_our_team category="faculty"]

The value for the category attribute needs to be the slug of the category you've created. This is typically just the category name in lowercase with any spaces replaced by dashes. You can check the slug names by going to Team Members → Categories.

Note: If you decide to use the shortcode on a page, do not use the Our Team template. Keep the Default template.

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.

Lightbox

Once you've added a photo gallery to a page, you either view the photos directly on the page or click on a photo to pop open a lightbox. The photos on the page have been adjusted to fit the column width. The photos in the lightbox will be full size.

Add New Gallery

1. From the left-hand navigation menu, click on Photo Gallery.
2. To add a new gallery, select "Add New Gallery" from the left-hand navigation menu.

3. 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.
4. Click on the Create Gallery Button. A new window will open.
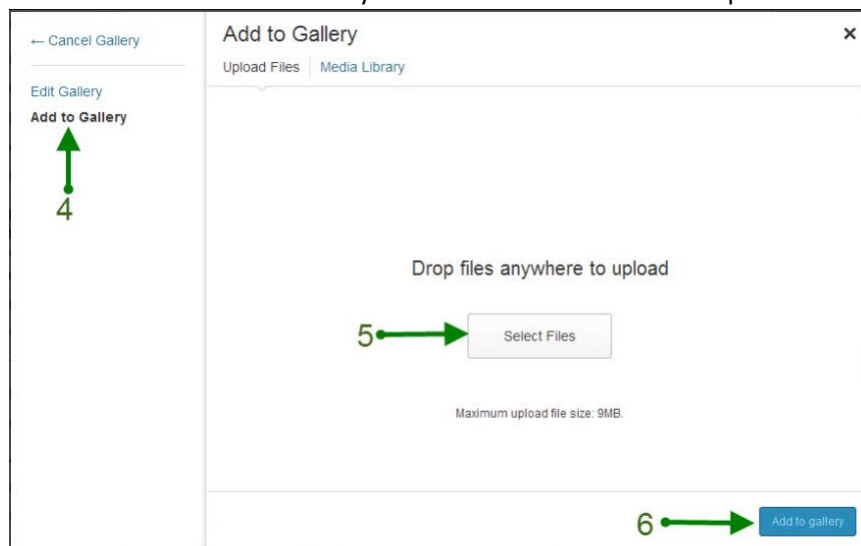
5. Click on Add to Gallery.

6. 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.
7. Once the photos have been uploaded, they will appear in the Media Library with checkmarks in the upper right corner indicating that they will be added to the gallery.

8. Click on each of the checked images to view the attachment details on the right side of the screen. The **Title** field defaults to the file name (see screenshot.) Either delete this value or replace it with something meaningful, as it will be displayed in the photo gallery lightbox.
9. Once all of the photo titles have been edited, click the Add to Gallery button to add the photos to your gallery.
10. Click the Publish button to save your photo gallery.

Edit Gallery

1. To edit a gallery, select "All Galleries" from the Photo Gallery menu. Click on the name of the gallery you wish to update.
2. To change the photos, click on the "Edit Gallery" button.
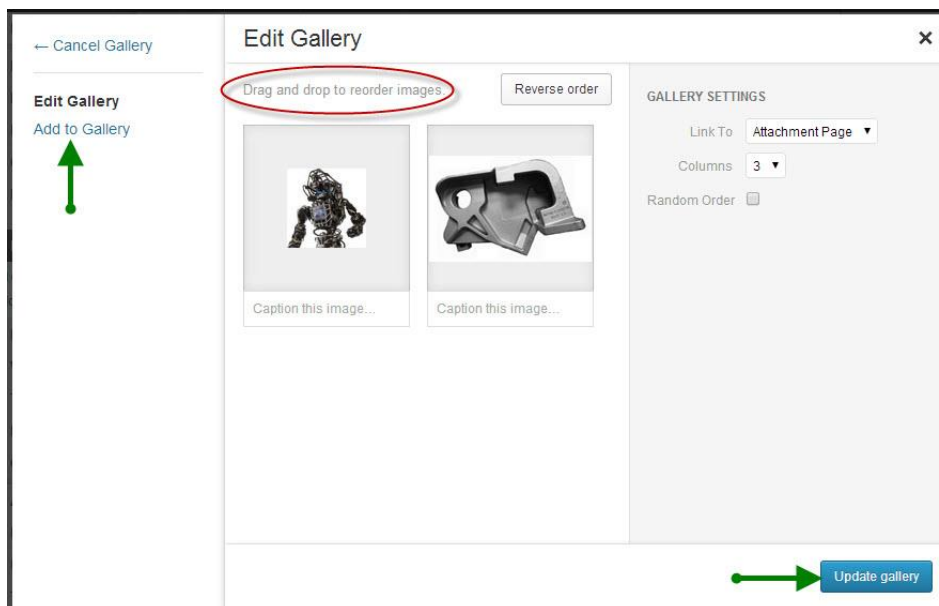
3. To add additional photos, click on the "Add to Gallery" button and follow the instructions above (under Add New Gallery.)
4. You can also re-order the photo display by dragging the images.
5. Click the Update Gallery button to save your changes.
6. Click the Update button to save your changes.

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.

Recommended Photo Size

This theme will adjust your photos to fill the space you put them in. So a page without a sidebar will expand the photo gallery to the full width of the page. If you add a sidebar to that same page, the photo gallery will automatically be adjusted to fit the full width minus the sidebar width. Likewise, a photo gallery placed in the sidebar will be reduced in size to fit the sidebar. This holds true for single images and videos too.

Automatic photo resizing makes it easier on the page editor so that they do not have to keep resizing photos as the content on the page changes. However, you want to make sure that you don't size your images too small or they may end up stretched and pixelated. To avoid this, please use the following guidelines when sizing your photos. To maintain image quality, it's better to size the images larger than too small.

- Full width (no sidebar): images should be at least 925 pixels wide
- Body with sidebar: images should be at least 598 pixels wide
- Sidebar: images should be at least 271 pixels wide

Also note that there is no height limitation. Just make sure that you keep the same aspect ratio when you are resizing your photos so that they do not become distorted.
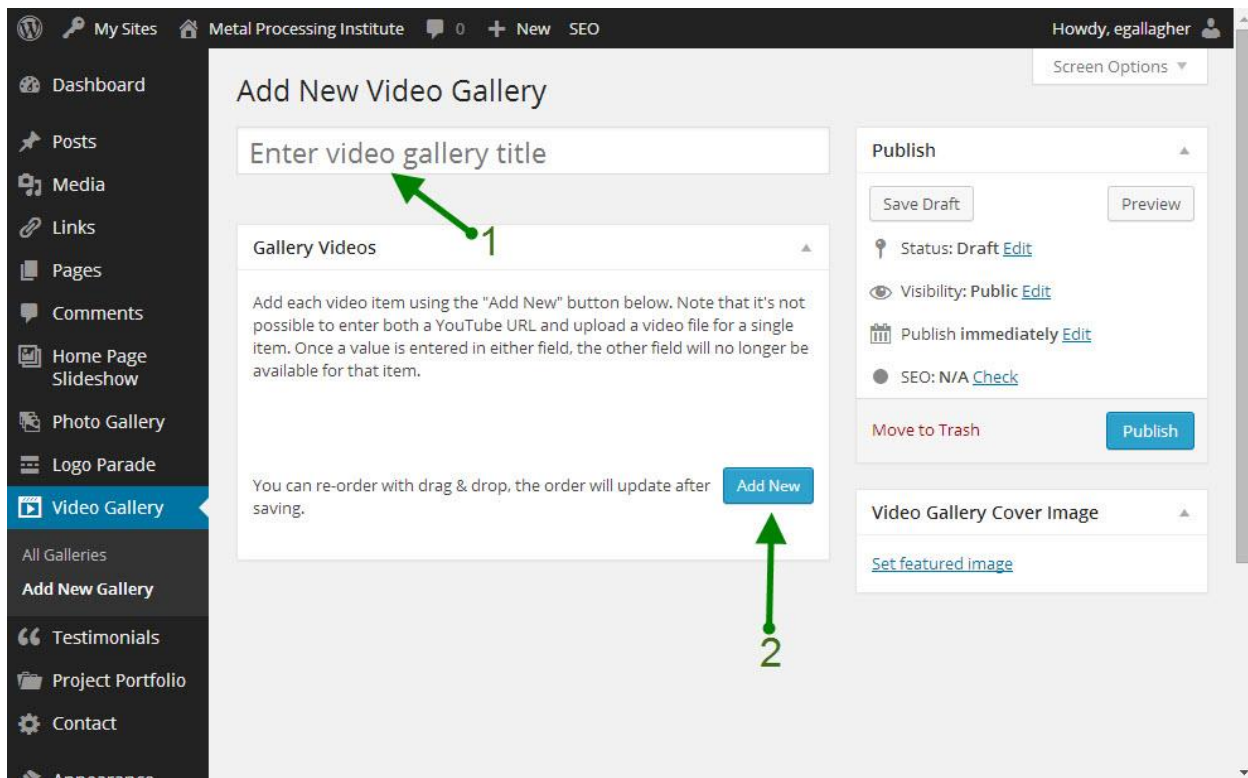
Video Gallery

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

Important Note: Do not put the video gallery in the sidebar. It was not designed to work in the sidebar and will break any other video gallery or photo gallery on the page.

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.

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 resized and cropped by WordPress to **150 pixels by 150 pixels**. Sizing the images before you upload them is not required but will give you more control over what's displayed in the thumbnail images.

A few things to note:

a. If the page doesn't have a sidebar, the video gallery can fit 6 thumbnails beneath it.
b. If the page does have a sidebar, the video gallery can fit 4 thumbnails beneath it.
c. 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 (preferred)
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.
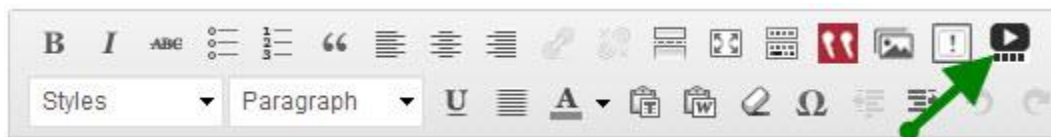
Edit Video Gallery

To edit a video gallery, select "All Galleries" from the Video Gallery menu. Click on the name of the gallery you wish to update.

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:

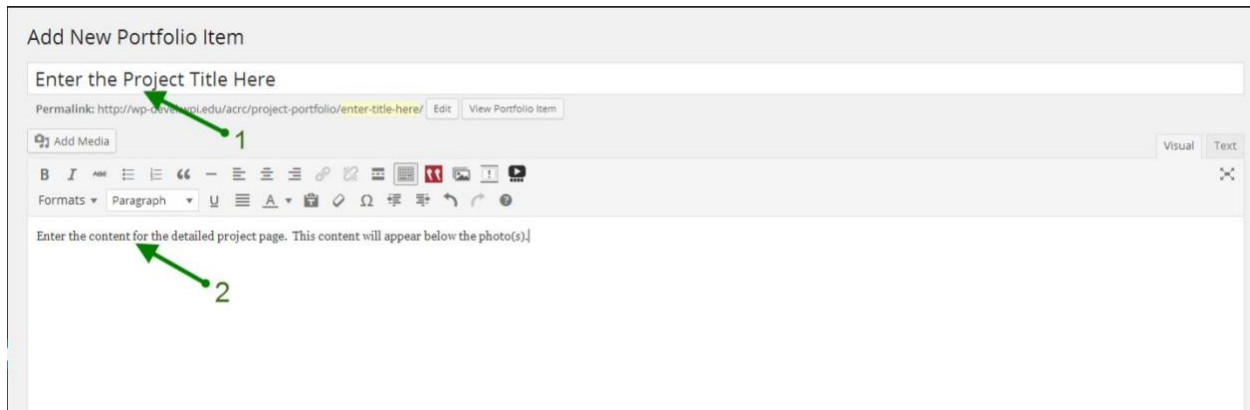1. Upload your video to YouTube.
2. Copy the URL from the top of the YouTube page (it should look similar to this with a different ending parameter: http://www.youtube.com/watch?v=pzmishrWqiA)
3. Paste the URL into your WordPress page where you want the video to display. You should be on the visual tab, 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.
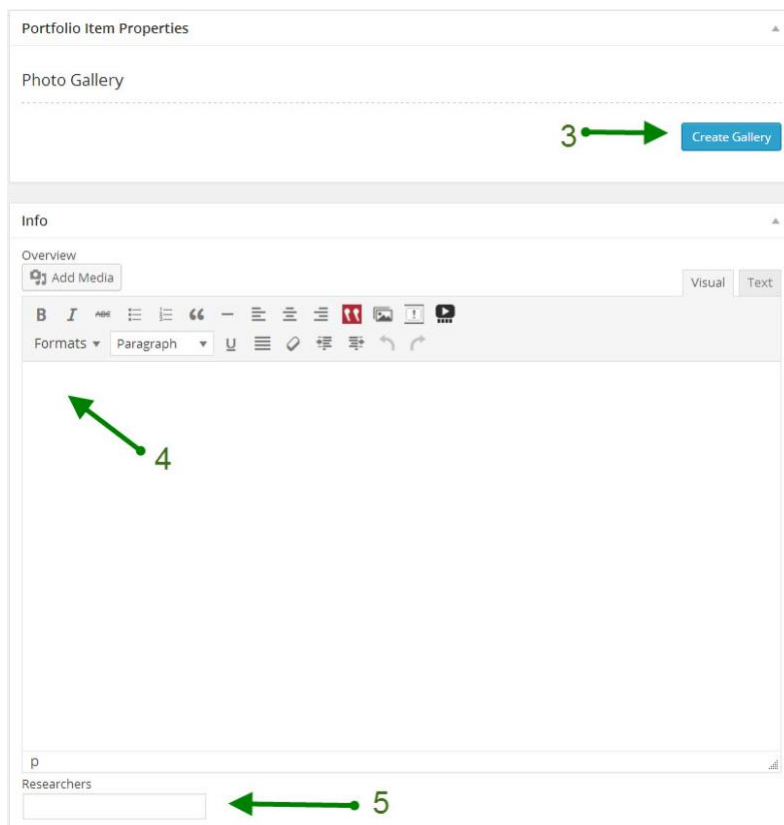
Project Portfolio

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.** You can upload a single image or multiple images to create a slide show. 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 (optional.)
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. Click on the name of the project you wish to update.

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.
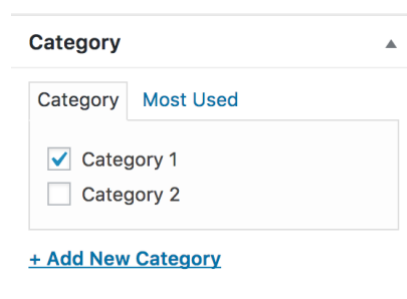
Order Projects

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

Once you've added your research projects, create a new page under the Pages menu. In the right column under Page Attributes, select the Template: **Projects Landing**. WordPress will generated the content for this page. You do not have to add any additional content; however, if you would like to add an introductory paragraph, it will be displayed above the project thumbnails. Publish the page to make it live on your website.

Project Categories & the Project Portfolio Shortcode

When adding a project to the portfolio you may have noticed the Category box beneath the publish button.   Categories allow you to organize your projects. Shortcodes, highlighted in yellow below, can be used to display your projects on different pages or to group similar projects together on the same page. This was designed to give you the utmost flexibility but is totally optional. You can just use the projects landing template as described above to display all projects on the same page.

Note: If you decide to use one of the following shortcodes on a page, do not use the Projects Landing template. Keep the Default template.

Shortcode Options

Add one or more of the following shortcodes into the editor, making sure to change the values in the *category* attribute to the names of the categories you have created.
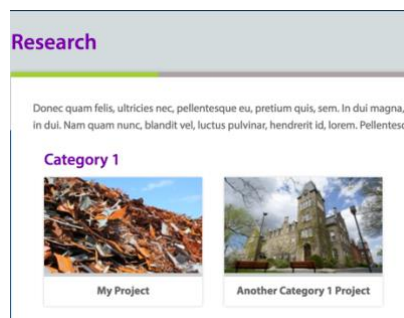
[projects_listing]

This shorcode will display all projects on a page, grouped by category as shown in the screenshot at the right . The name of the category will be displayed above the projects.
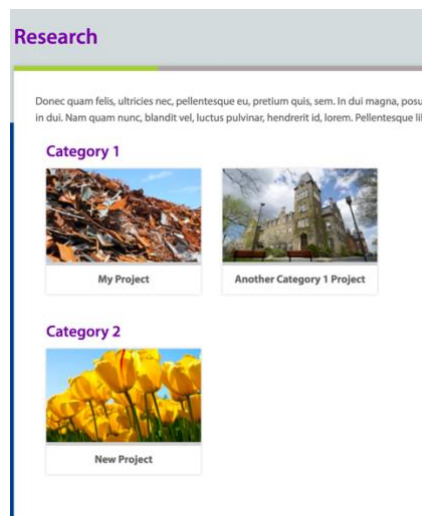
[projects_listing category="Category 1"]

Displays only the projects in the specified category. This can be used if you have a large number of projects and would like to display different categories on different pages.

You can also change the category title that is displayed above the projects by adding a title attribute:

[projects_listing category="Category 1" title="This is the new title for Category 1"]

Or completely hide the category title (this may be useful if the page name is the same as the category name):
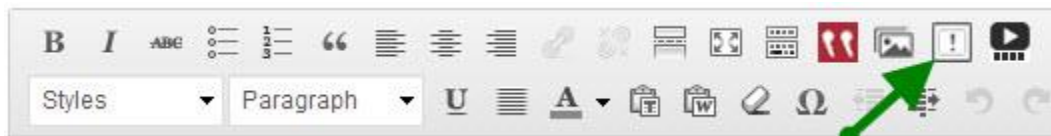
[projects_listing category="Category 1" hide_title

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

Note that the highlight box will not be displayed in the editor. You will need to preview or publish the page to see this content.

Adding New Users

IMPORTANT: If your lab website begins with **https://wp.wpi.edu**/labname , please see the instructions on this page for how to add users to your website.

This is a 2-step process. New WordPress users must first create an account by logging into WordPress following the first 4 steps listed below. Once they have logged into WordPress, you will be able to add them as a user to your website.

New Users: Creating an Account

1. Go to: http://labs.wpi.edu/
2. Scroll to the very bottom and click on the log in link
3. Log in with your WPI username and password
4. 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. From the menu, choose "Add Existing User"
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.

The user will be sent an email letting them know that they have been added as a user to the web site.

Columns 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] This content will appear in the first column (first half) of the page.
[/half][half_last] This content will appears in the second column (last half) of the page.
[/half_last]

Social Media Links in Footer

There are 3 optional social media links (Twitter, Facebook & LinkedIn) that can appear in the footer above the copyright as shown in the image below:

Unfortunately, the screen for entering these links is only available to super-admin users. If you would like one or more of these links added (or updated), please send the links to WordPressHelp@wpi.edu and our helpdesk staff can add the links for you.