



WPI

WordPress Manual
First Year Experience

October 1, 2018

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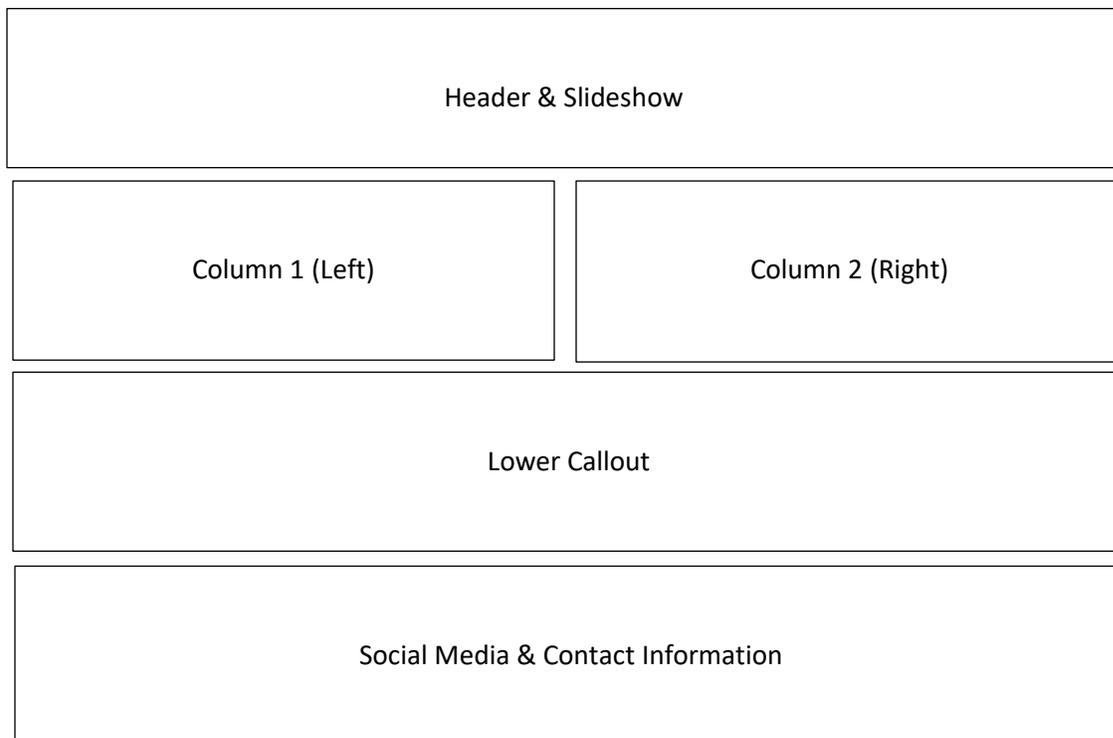
Who should use this manual

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 are not familiar with WordPress, please review the videos and tips at <https://www.wpi.edu/+wordpress>.

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.

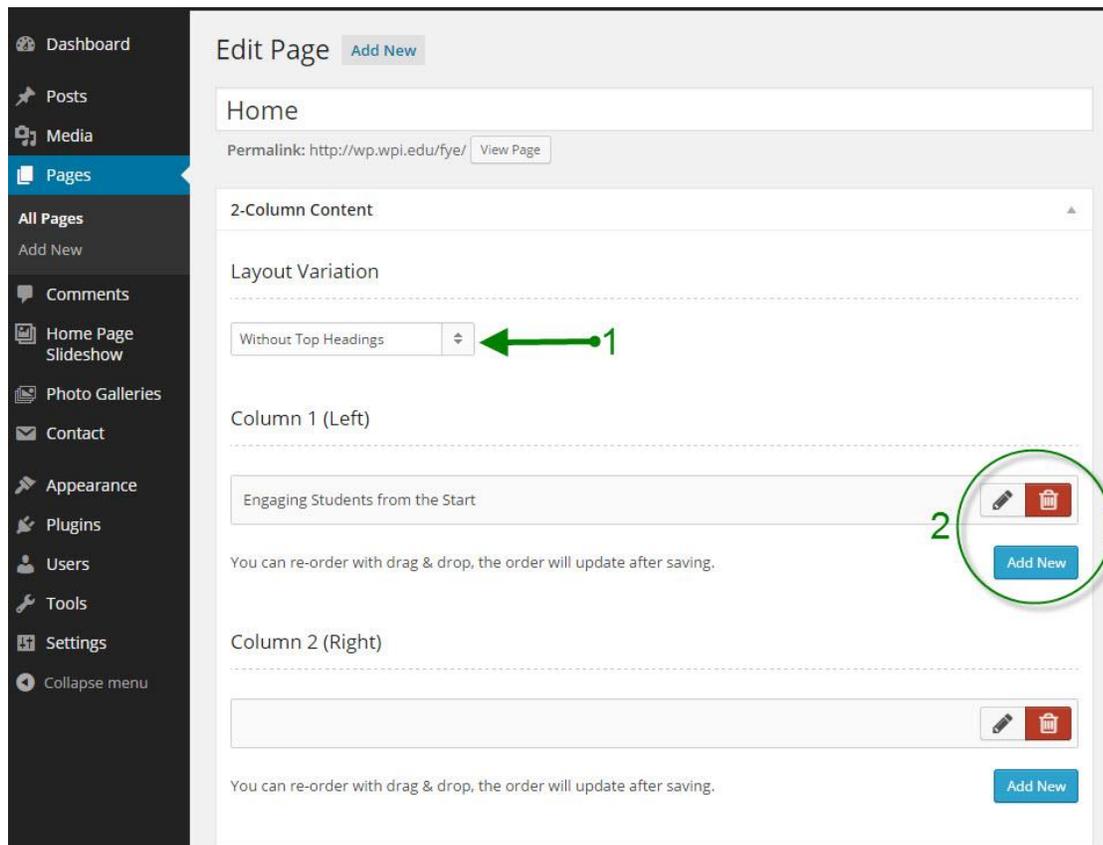


Header & Slideshow

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)

The screenshot shows a content editor interface for a block titled "Engaging Students from the Start". The interface is divided into several sections:

- Title:** A text input field containing "Engaging Students from the Start".
- Content:** A rich text editor with a toolbar. The toolbar includes options for Bold (B), Italic (I), text color (A), background color (ABC), bulleted list, numbered list, quote, indent, link, unlink, table, unlink, icons, and formats. The text area contains the following paragraph:

Keeping students engaged and motivated throughout their college experience is at the cornerstone of a WPI education. That engagement starts in the first year, beginning with opportunities to Get Connected in the months leading up to your arrival on campus, to New Student Orientation where you will meet upperclassmen, faculty, and staff and learn all about campus life, to immersion into our distinctive first
- Heading Top:** A text input field.
- Expiration Date:** A date picker input field with a tooltip that reads: "Select a date after which this content should no longer be displayed".

Expiring Content

Because we anticipate that some of the content may be re-used from year to year with only slight modifications, we will be adding the ability to add an expiration date to each of these column blocks so that you can turn off content and save it for use at a later date. **Please note the expiration date field is not currently working and will be activated in Phase II of this project.**

Adding New Content

Important: When adding a new block of content to one of the columns, you'll notice that the toolbar above the editor does not initially display. This is a bug in the editor. You'll need to Publish/Update the page before the toolbar will appear.

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 2nd 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.](#)

Image

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3

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:

For assistance with editing the contact form in the footer of the page, please submit a helpdesk ticket to WordPressHelp@wpi.edu.

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.

Timeline to Campus

The Timeline to Campus page is divided into 3 sections: Content, Banner Image & Date Buttons.

1. At the top of the page is the content editor as shown below.

Timeline to Campus

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

Add Media Visual Text

B I ABC Icons Formats

Paragraph

Start Your WPI Experience

We're delighted that you've chosen to come to WPI. This handy website will guide you through the steps necessary to be ready to join us in August.

Click on each of the deadline dates on the right to find your tasks in priority order. You can start the process and come back as often as you need to. Some items need to be completed during a specific timeframe, so check back regularly to make sure all tasks are completed on schedule.

Let's get started. We can't wait to see you during New Student Orientation.]

P

Word count: 98 Last edited by egallagher on April 29, 2015 at 7:17 pm

2. Below that is a section with 2 tabs. The first tab is the Splash image. On this tab, you can remove the current image by clicking on the red minus sign and add a new image by clicking on the blue plus sign. You can also add an optional caption to be superimposed on the image.

Timeline to Campus Page Details

Splash

Date Buttons

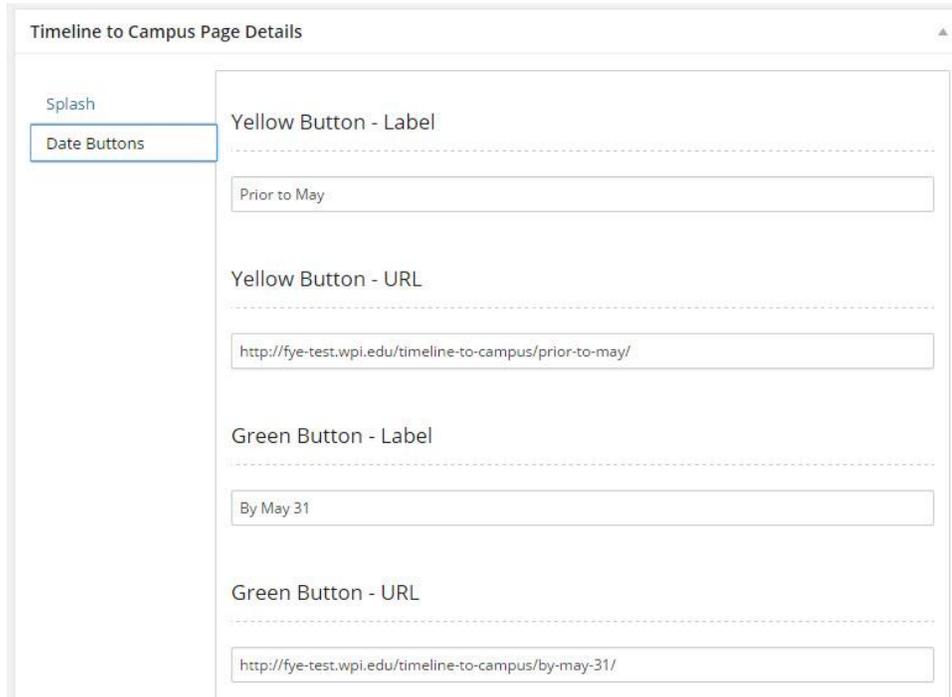
Splash Image

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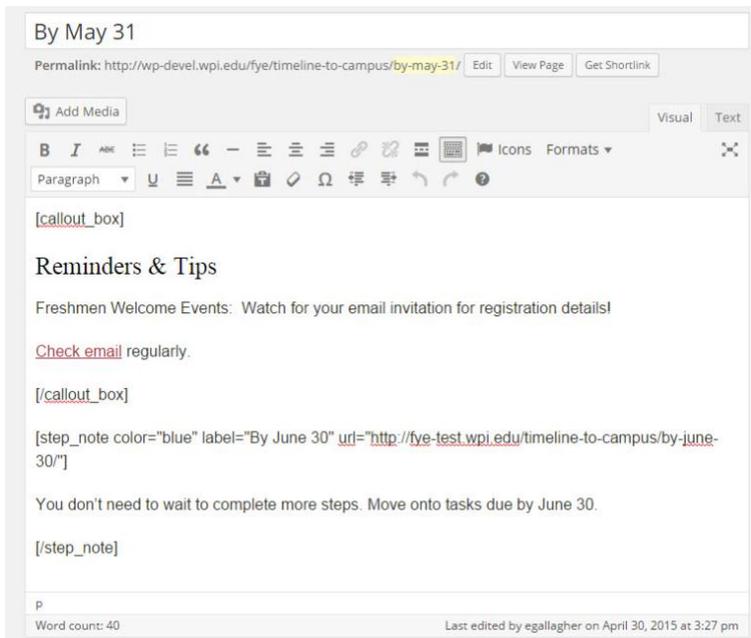
Splash Caption

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



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.

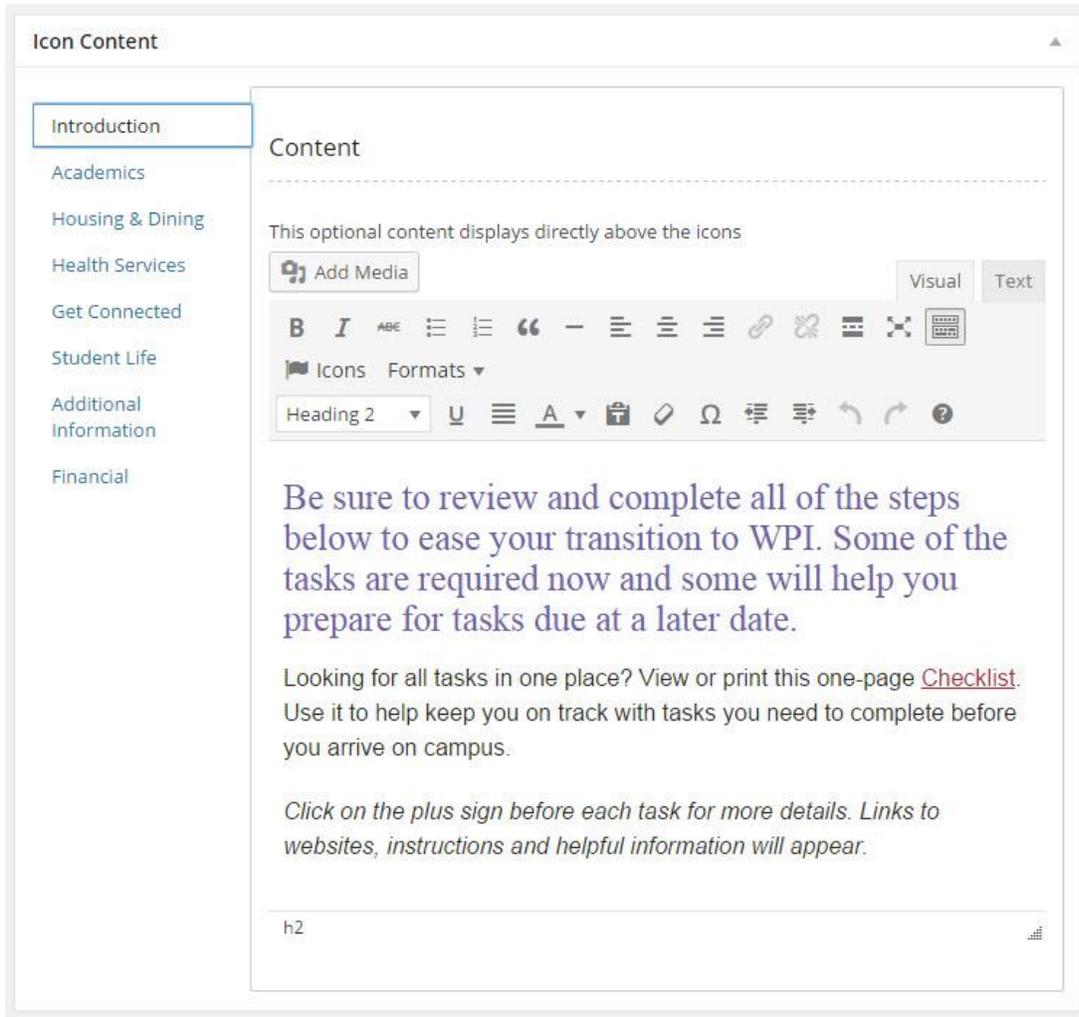


Please refer to the [shortcodes section](#) at the end of this document for some of the formatting options that can be used to make important information in this bottom section stand out. In the example at the left, a callout box is used for Reminders & Tips. Also, each of the date pages uses a [Step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

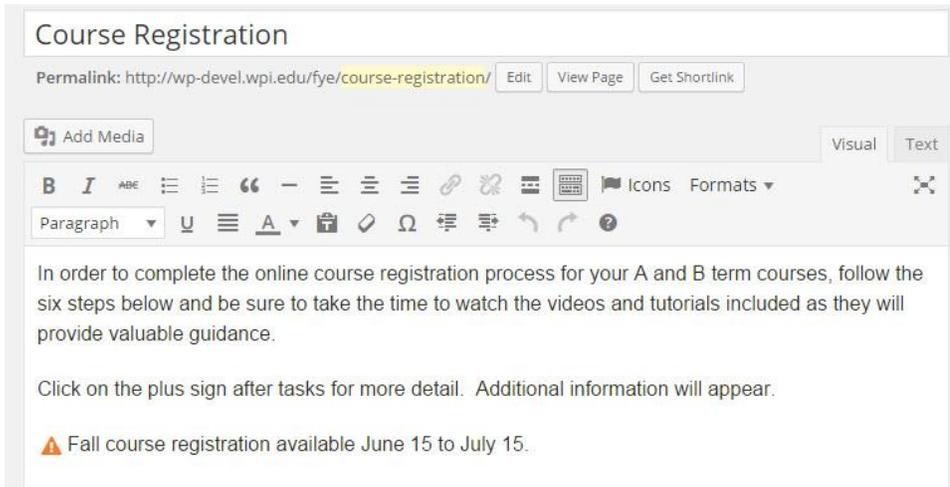


Date Buttons

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.

Course Registration Pages

The intro text, above the 6 Step buttons, can be entered into the top editor box as shown below.



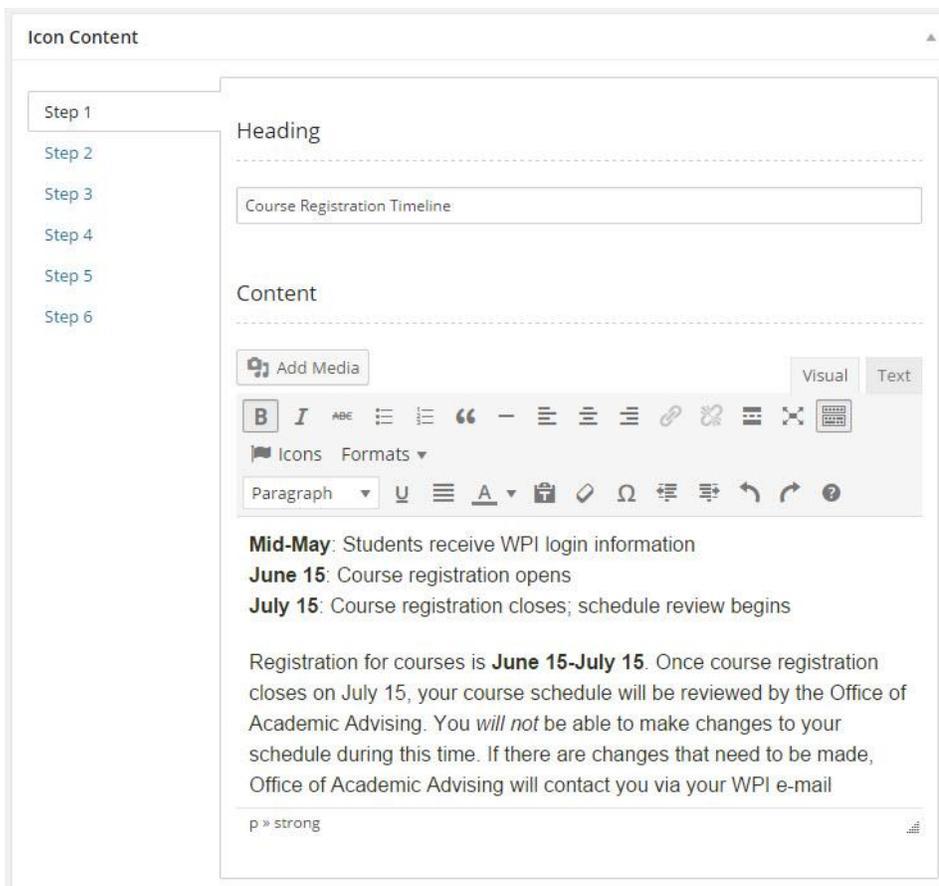
The screenshot shows the top editor box for a page titled "Course Registration". It includes a permalink: <http://wp-devel.wpi.edu/fye/course-registration/> with "Edit", "View Page", and "Get Shortlink" buttons. Below the permalink is an "Add Media" button and "Visual" and "Text" tabs. A rich text editor toolbar is visible, with the "Text" tab selected. The main content area contains the following text:

In order to complete the online course registration process for your A and B term courses, follow the six steps below and be sure to take the time to watch the videos and tutorials included as they will provide valuable guidance.

Click on the plus sign after tasks for more detail. Additional information will appear.

⚠ Fall course registration available June 15 to July 15.

To enter content for each of the 6 steps, select the appropriate tab from the left and enter the content into the editor as shown below.



The screenshot shows the "Icon Content" editor. On the left, there is a sidebar with tabs for "Step 1" through "Step 6". The "Step 1" tab is selected. The main editor area has a "Heading" section with a text box containing "Course Registration Timeline". Below this is a "Content" section with an "Add Media" button and "Visual" and "Text" tabs. The "Text" tab is selected, and the content area contains the following text:

Mid-May: Students receive WPI login information
June 15: Course registration opens
July 15: Course registration closes; schedule review begins

Registration for courses is **June 15-July 15**. Once course registration closes on July 15, your course schedule will be reviewed by the Office of Academic Advising. You *will not* be able to make changes to your schedule during this time. If there are changes that need to be made, Office of Academic Advising will contact you via your WPI e-mail

p » strong

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.

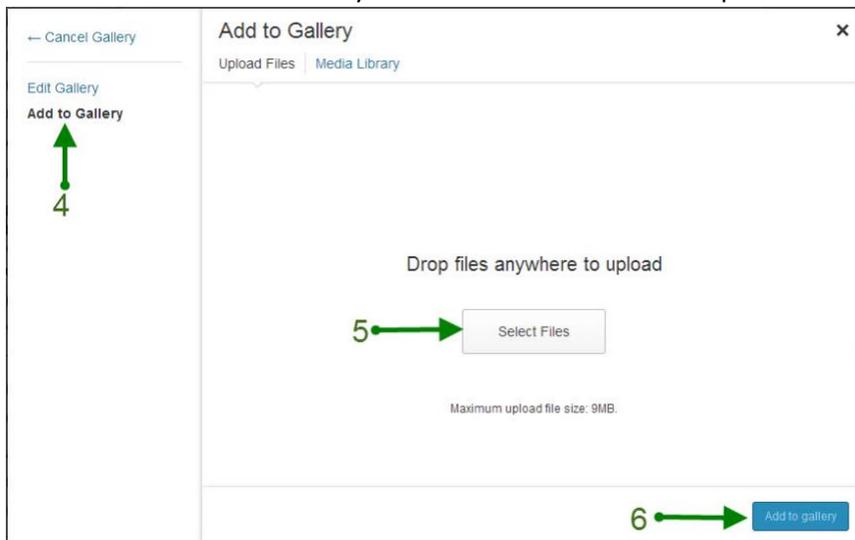
From the left-hand navigation menu, click on Photo Gallery.

Add New Gallery

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



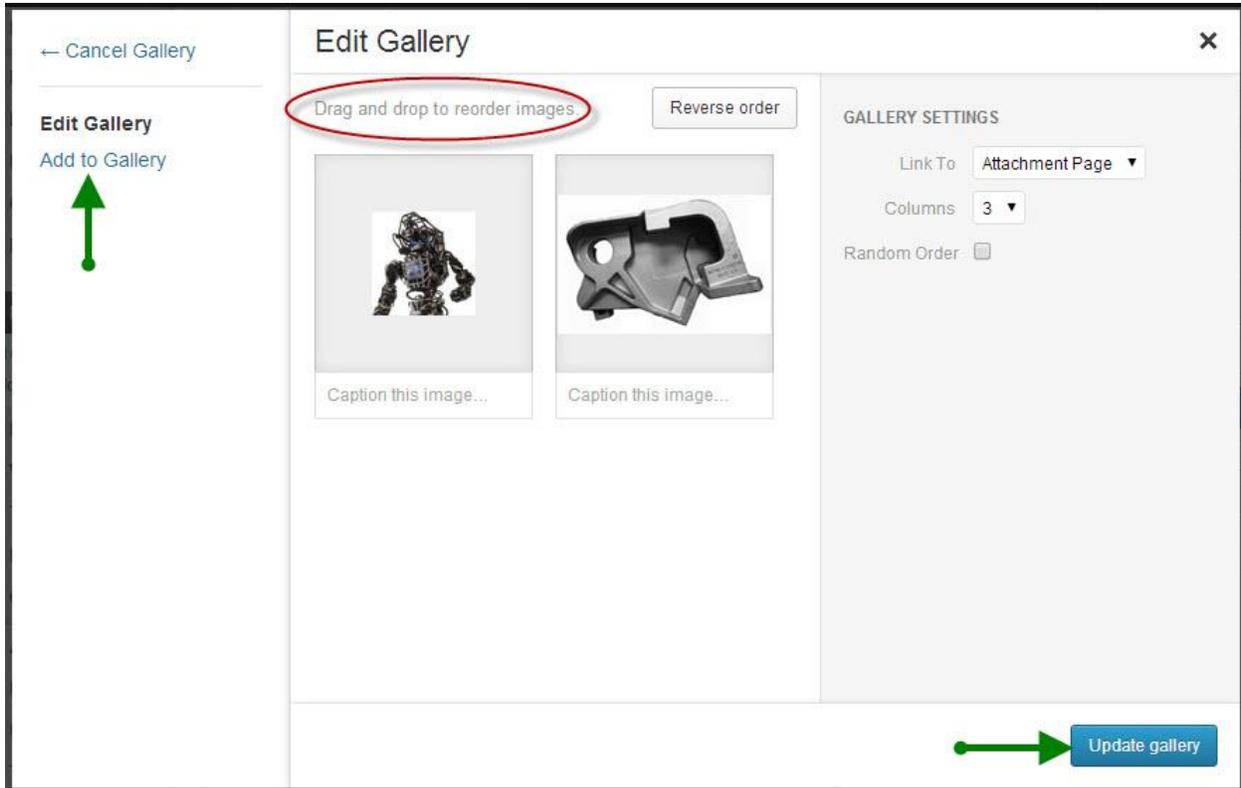
2. Enter a title for the photo gallery. This does not appear on the web site but will help you to identify your different photo galleries.
3. Click on the Create Gallery Button. A new window will open.



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"]
```