

Overview



The Charlotte Art League's website is built using WordPress, the popular, open-source software environment used to run millions of blogs and websites worldwide.

A major advantage of WordPress is that in addition to its common use as a blogging platform, it also functions well as a multi-user content management system, which is why we have decided to use it to run the CAL website.

User-Friendly

WordPress operates differently than normal, "static" webpages. Instead of creating a page as an HTML file that you then must manually modify every time you wish to update your content, with WordPress you instead create entries in a database that WordPress retrieves and populates into a template. Fortunately, WordPress provides a very user-friendly interface that allows you to work with your content without needing to know a thing about database administration - WordPress does the heavy lifting behind the scenes!

No technical experience required

As a CAL user, you have been set up in the system as an **editor**, meaning that you have the ability to create, edit, and delete content, but are insulated from the technical, behind-the-scenes functionality that runs the site. If you are familiar with popular word-processing software such as Microsoft Word, you should have no problem using the editing tools provided in WordPress.

In today's workshop, we'll cover how to log in and set up your user profile, how to navigate in WordPress, how use pages and add media, and finally, we'll work through a few examples together to give you some hands-on experience before you're on your own.

Logging In

WordPress is administered through a browser-based application that you must log in to. To access WordPress administration, enter the following address in your browser:

`http://www.charlotteartleague.org/wp/wp-login.php`

Bookmark this address for ease of future use.



Fig. 1.0 — WordPress Login

1. In the **Username** field, enter the username that was emailed to you prior to this workshop.
2. In the **Password** field, enter the default password "newpass." Don't worry - we'll discuss how to change the default password to something more secure later in the workshop.
3. Click **Log In** when finished.

Your User Profile

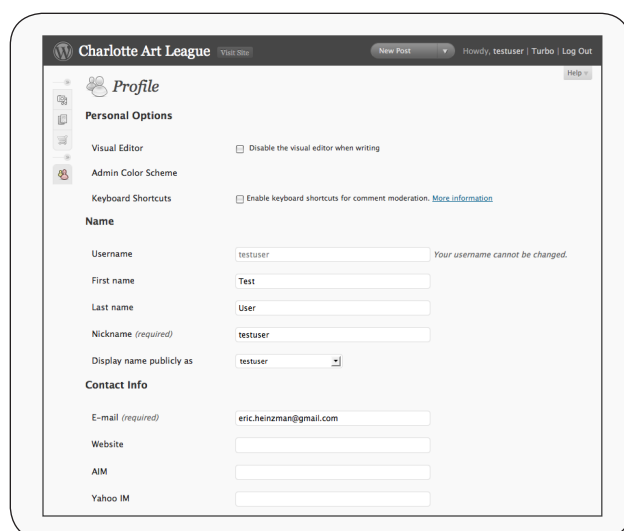


Fig. 2.0 — User Profile Screen

Upon logging in, the first screen you see is your **User Profile**. On this screen, you can change your password, update your contact information, and add personal information if you wish. CAL's site is not currently set up to publicly display editor profiles, so info you add here will only be available to other CAL editors and administrators.

Navigating in WordPress

The main WordPress interface controls are found along the left side and at the top of the screen. The top controls are mainly utility features and shortcuts, while the left sidebar contains the feature you'll use to actually work with site content and media. Many of WordPress's interface features are highly customizable, so you can configure the screen to look the way you want it to.

Left Sidebar

The left sidebar consists of links to the three main areas you'll interact with as a CAL editor: **Pages**, **Media**, and your **User Profile**.

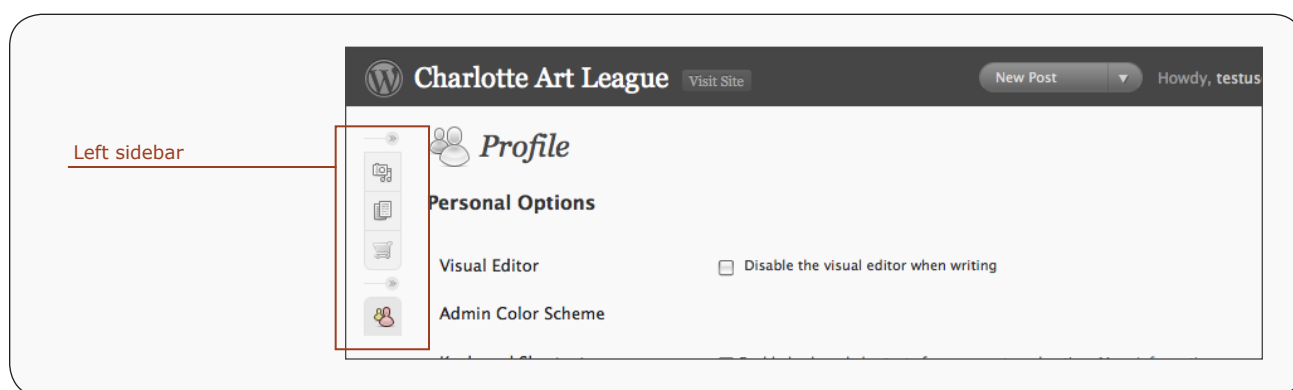


Fig. 3.0 — Left sidebar location

Expand/collapse. Expand to reveal labels, collapse for icons-only.

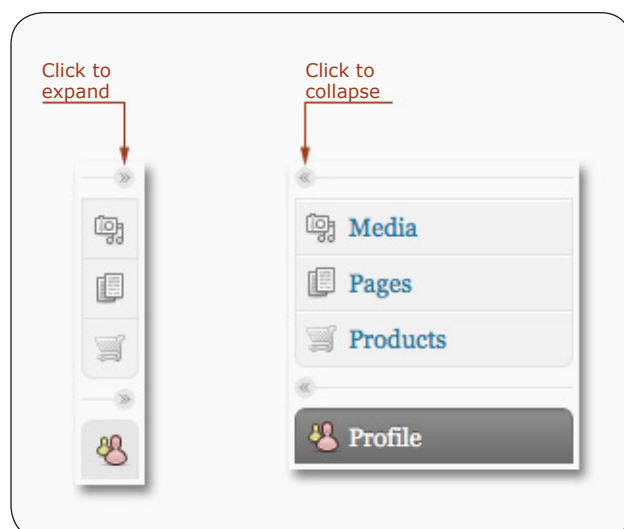


Fig. 3.1 — Left sidebar showing expanded and collapsed states

Dropdowns. Click down arrow to open accordion-style persistent dropdown.

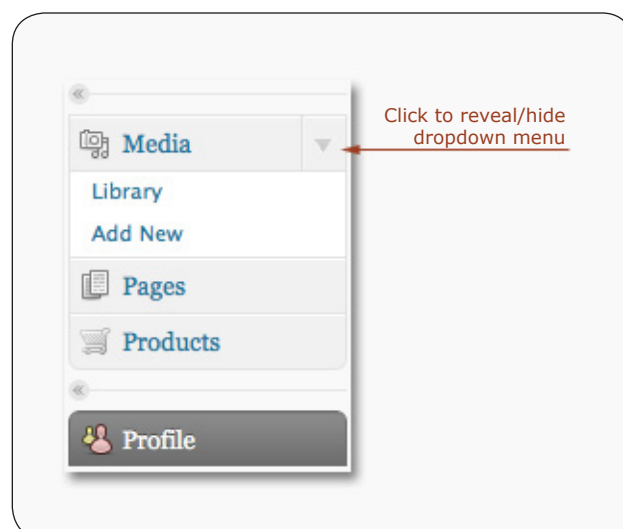


Fig. 3.2 — Left sidebar dropdown menu

Top navigation

The top navigation contains links to utilities and navigation shortcuts that help you use WordPress more efficiently.

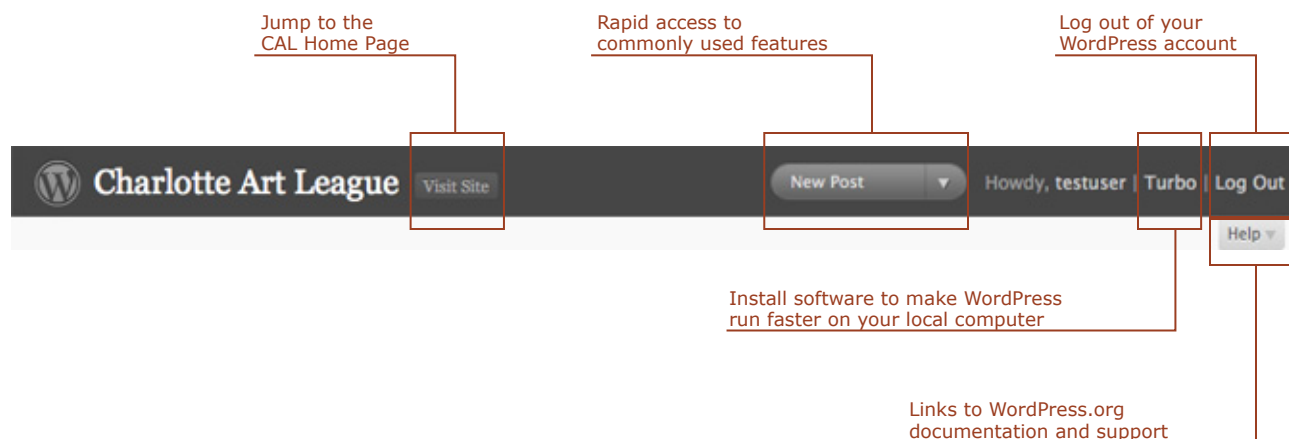


Fig. 3.4 — Top navigation

Using Pages

Now that we're familiar with the basic WordPress navigation features, let's take a look at the functionality that you'll use to add content to the CAL website. Amazingly enough, WordPress's name for an individual, free-standing content page is a "Page," so we won't have to learn any fancy terminology that only a true geek could love :-)

Opening a Page to Edit

1. Click **Pages** on the left sidebar to open the list of pages currently in the site.
2. Click the title of the page you wish to edit to open it in editing view.

Hint: Click **Screen Options** to set WordPress to show all pages on a single screen. Since the CAL site currently has about fifty pages, setting "Pages per page" to a large number like 100 will save you the trouble of having to browse through multiple screens in order to find the page you're looking for.

Alternatively, you can use the **Search** box to find the page you're looking for. WordPress Search looks for your search phrase in the body of the page as well as the title, so your search will likely return multiple results.

Page List Features

Mouseover controls. Roll the mouse over a listed page to display links that allow you to open the item for editing, open the **Quick Edit** functions, delete the item, or view the item in a webpage.

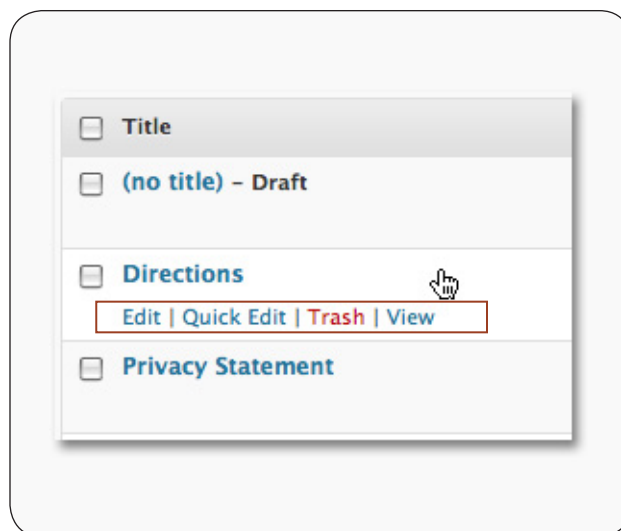


Fig. 4.0 — Mouseover controls on Page List screen

Quick Edit. Click **Quick Edit** from the mouseover controls to open a set of controls that allow you to access common editing features without requiring you to open the page in the full editing screen.

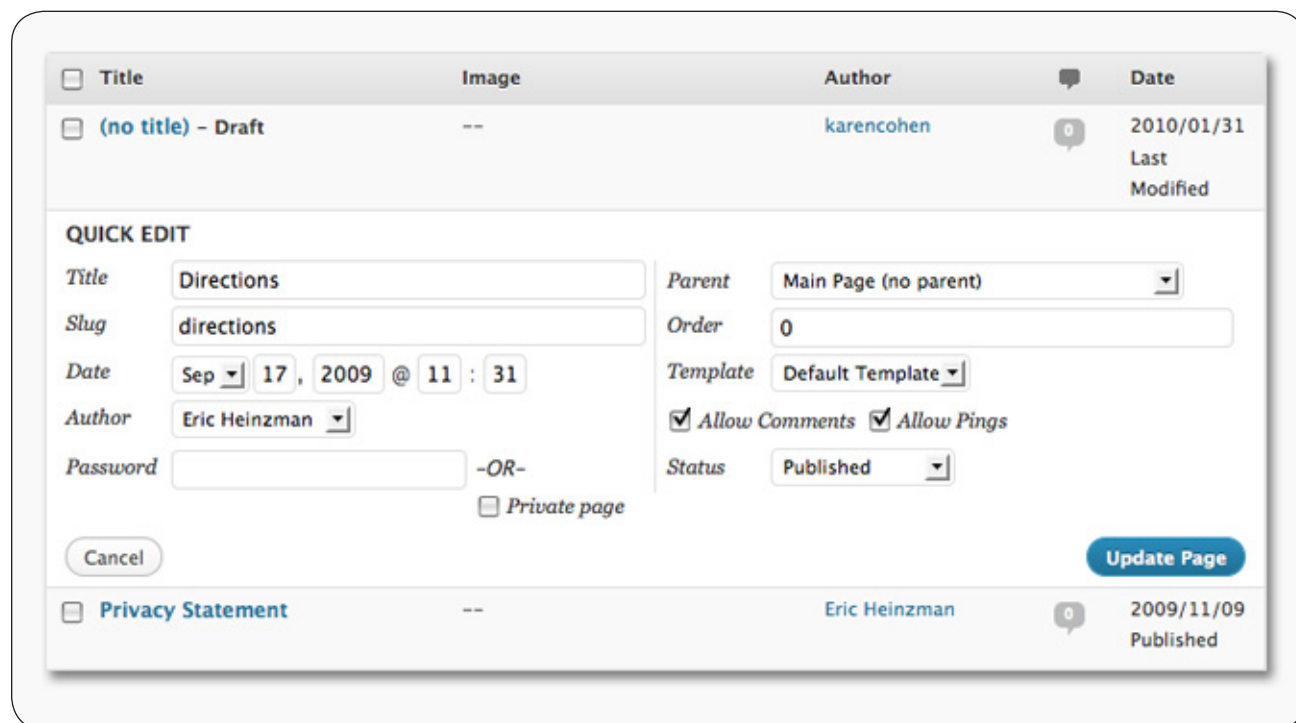


Fig. 4.1 — Quick Edit

Edit Pages: Screen Components

- **Page Title.** The “permalink” below the title automatically matches the exact text of the title, although you can edit the permalink if, for example, you want to shorten it.
- **Editing.** Provides basic word processing functionality, media selection, and allows you to work in either visual mode or directly in the HTML.
- **Publish.** Controls used to publish, update, and set public viewing permissions.
- **Attributes.** Set the properties of a page within the site hierarchy.
- **Exclude Pages.** Adds current page to main site navigation bar. Although on by default when you create a new page, it should generally be turned off before you publish. Consult with the webmaster if you want a page added to the site menu.
- **Custom Fields.** Advanced functionality. Consult with the webmaster prior to use.
- **Discussion.** Select these options if you want to allow users to publicly comment on your page. Comments are turned on by default when you create a new page because comments add to the search ranking of a page.
- **Page Author.** Assign page ownership to appropriate user. Generally speaking, if you create a page or are the primary editor, it should be assigned to you.
- **Page Revisions.** Displays the edit history of the current page.

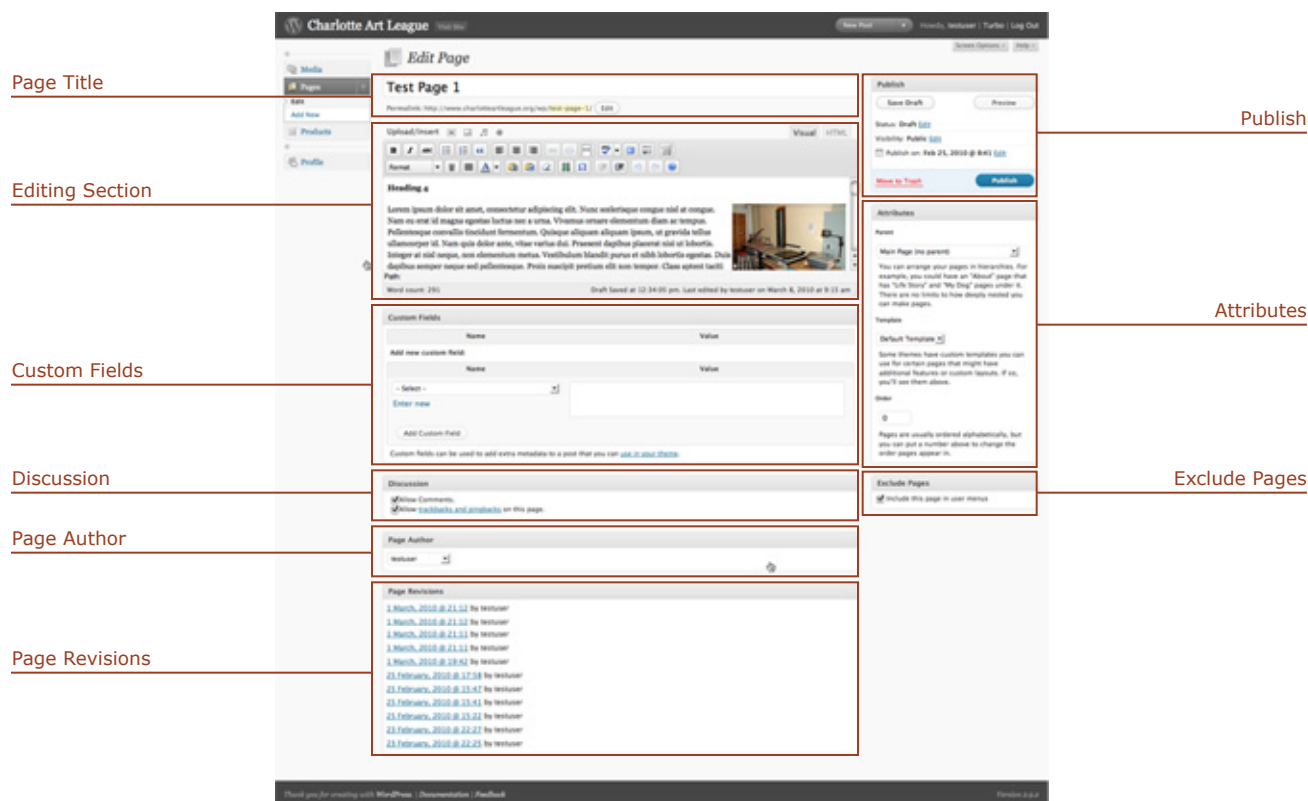


Fig. 4.2 — Edit Pages

Editing the Homepage

Editing CAL's homepage is very similar to editing any other page, with one crucial difference: Instead of opening **Pages** to create or edit the homepage, you instead open **Posts**. This is because WordPress is set up to always display the most recent Post as the Home page on the site, so that the more current and important content is prominently featured.

The basic Post controls are very similar to the Page controls with which you are already familiar, with two major differences:

- Above the main content editing area is a section labeled **YAPB Image**, where the home page heading photo/graphic is displayed at the top of every home page is entered.
- The **Custom Fields** section is where you enter the home page subtitle.

Adding a Home Page Heading Graphic

IMPORTANT — The graphic must be sized to *exactly* 650x300 pixels in order for it to function correctly in the layout. It's always a good idea to start with a larger image than you will need, then resize or crop the image down to the required dimensions to preserve image quality.

1. Click **Browse** in the **YAPB Image** section. Your operating system's standard file selection window will open.
2. Select the image you wish to add to the home page, and click **Open**. *Note - The button label text in the file selection window may vary depending on your operating system.*
3. Leave the checkboxes unchecked.
4. Click **Update Post**. The header image you selected will now appear when you preview the post.

Adding a Subtitle

1. In the **Custom Fields** section, select "**subtitle**" from the **Name** drop-down menu.
2. Enter the exact text for the subtitle in the **Value** text entry box.
3. Click **Update Post**. Your subtitle will appear when you preview the post.

Adding the Gallery Hours Table

The Gallery Hours listing that appears at the upper-right of the home page uses a styled HTML table entered directly into the content area. So that you won't have to worry about doing any HTML coding yourself, a code snippet is available for you to simply copy and paste into your posting.

1. Click **Posts** on the left sidebar to display the main listing of all Posts.
2. Locate the private post titled "**Gallery Info table code snippet**" and click its title to open it in the editing screen.
3. Click the **HTML** tab at the top of the editing window.
4. Select all of the HTML code in the editing window and copy it.
5. Click **Posts** again on the left sidebar to return to the main listing of all Posts. *Note - If a warning appears telling you that you are attempting to navigate away from an unsaved page, go ahead and click **OK** to continue. You don't want to save anything on the code snippet page anyway.*
6. Locate the post you wish to add the Gallery Hours table to, and click its title to open it in the editing window.
7. Click the **HTML** tab at the top of the editing window.
8. Place your cursor *at the very beginning of the content area*, before any content or HTML that may already be present. The Gallery Hours table must be the very first thing that appears in the code.
9. Click the **Visual** tab at the top of the editing window.
10. The table now appears in a rough, unstyled manner at the top of the visual editor. Edit the Opening Reception date as appropriate.
11. Click **Update Site**. The table now appears when you preview the post.

Managing Media

Adding media elements to your page involves a simple process of uploading your media to the CAL website's media library, selecting the item for placement in your page, and specifying its placement on the page. Since the majority of the media used on our site consists of images, we'll focus on the functionality used to manage images in WordPress.

Media Library

Click **Media** on the left sidebar to open the media library. The Library displays similar to the Page listing, where you can click on an item to open it for editing, or mouse over the item to view more options.

- **Thumbnails.** Each media object has an automatically generated thumbnail image.
- **Attached To.** This column lists any pages that a media object is used in.

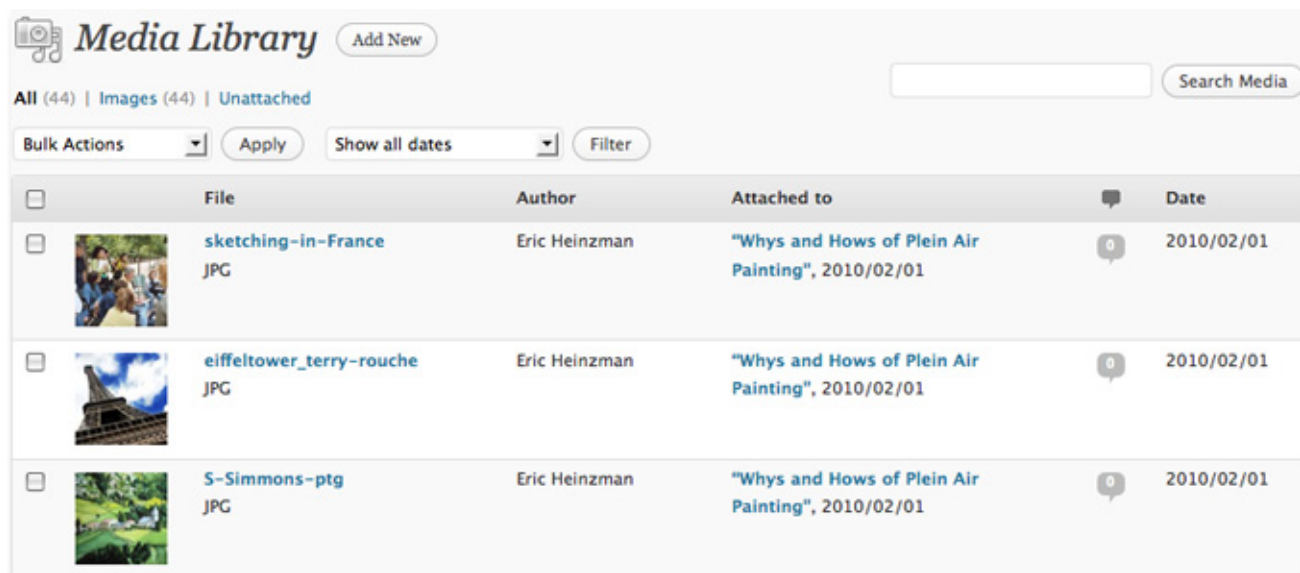


Fig. 6.0 — Media Library

Editing Images

WordPress provides basic image editing tools that you can access either by clicking the name of the image you wish to edit, or by using the **Edit** link available in the mouseover controls. The initial screen shows a summary of image information; click **Edit Image** to open the image editing screen.

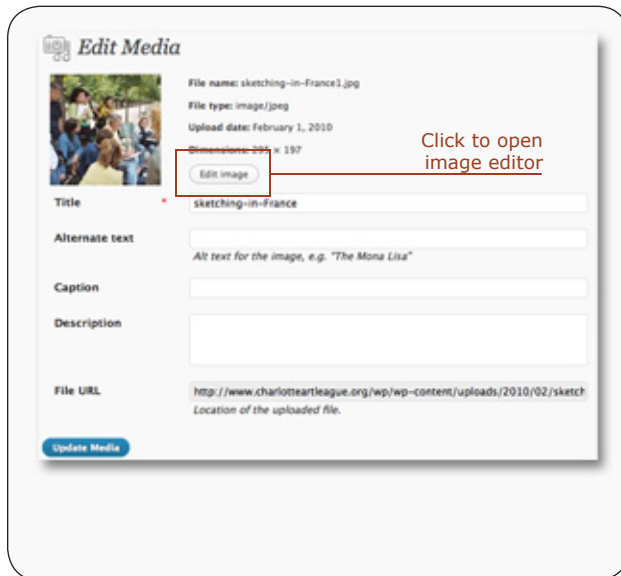


Fig. 6.1 — Edit Media screen



Fig. 6.2 — Image Editor

Image Dimensions

Images should be sized to the required dimensions before you place them into the page. You can either size them yourself using a program like Photoshop, or use the editing tools WordPress provides. To promote layout consistency throughout the site, images should generally be sized to one of three widths:

- **Full** (610 pixels wide)
- **1/2** (295 pixels wide)
- **1/3** (190 pixels wide)

Note that the 1/2 and 1/3 widths incorporate 20 pixels of padding around the images.

Image Alignment

Images can be set to align to the left, right, or center of your page layout. For most situations, you should add the image before any paragraph text — even if the image is to be right-aligned! WordPress will automatically place the image in the specified alignment after you've selected and inserted the image.

Hands-On Examples

Adding a page

1. Click **Add New**
2. Select Parent (if applicable)
3. Select **Exclude** (if applicable)
4. Enter Page Name
5. Click **Save Draft**
6. Enter content
7. Select visibility: **Private** for workshop, **Public** for live publishing.
8. Click **Publish**

Editing a Page

1. Click **Edit**
2. Select page
3. Select Visual or HTML editing mode
4. Edit content
5. Click **Show Kitchen Sink**
Note: Mouseover formatting controls for tooltips.
6. Click **Preview**
7. Click **Publish**

Basic Text Editing

1. Add paragraph text.
2. Insert an image
3. Add a **Heading 3** (large gray underline)
4. Add another paragraph
5. Add a **Heading 4** (orange underline)
6. Set visibility to **Private**
7. Click **Publish**

Adding An Image to the Media Library

1. Click **Add New**
2. Click **Browse...**
3. Select item
4. Click **Upload**

Adding an Image to a Page

1. Place cursor at start of paragraph - even for right-aligned images!
2. Click the **Add an Image** icon
3. Select the media source (computer, URL, library)
4. Remove link URL.
5. Set image alignment
6. Set image size
7. Click **Insert Into Post**

Editing an Image

1. Click **Edit Image**
2. Scale
3. Crop
4. Rotate
5. Flip
6. Help
7. Click **Update Media**

Support Resources

As the world's most popular blogging and content management platform, WordPress has been extensively documented and has a vast community of users of all levels. This workshop only covers the basics that you'll need to know to be able to effectively administer your committee's content needs. If you are interested in learning advanced techniques or simply want to learn more about WordPress than we could cover in this brief workshop, the links below are a good place to get started.

<http://wordpress.org/>

http://codex.wordpress.org/WordPress_Lessons

http://codex.wordpress.org/Finding_WordPress_Help

<http://codex.wordpress.org/Pages>

<http://en.support.wordpress.com/>

<http://en.support.wordpress.com/pages/>

<http://en.support.wordpress.com/images/>

A PDF version of this guide is located at

<http://www.charlotteartleague.org/media/CAL-Website-User-Guide.pdf>