

# WordPress Quick Reference Guide

## Log In

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A **log In link** is available in the global footer at the bottom of all UF Health webpages.

You can *bookmark this link*, as well: <http://ahc-webservices.sites.medinfo.ufl.edu/wp-login.php>

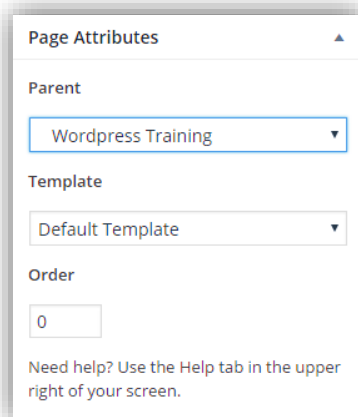
## Pages

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**Create:** Click on **Pages** in the *Dashboard Navigation Menu*, and choose **Add New**.

**Edit:** Click on **Pages** in the *Dashboard Navigation Menu*, and click on the title of the page you want to edit **OR**, while logged into the site, find the page on the live website that you want to edit, then at the *top of your screen* in the *black navigation bar*, choose **Edit Page**.

**Page Attributes:** Pages are automatically inserted into your site's main navigation menu.



**Parent** – Choose whether a page remains independent in the navigation menu, or becomes a child page to a parent page by selecting the parent page from the dropdown list.

**Template** – Most pages will use the default template. Other options are Full Width with no sidebars, and Members Only for users logged into WordPress.

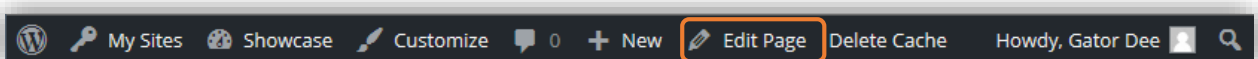
**Order** – set the page's order using any whole number (i.e. 1,2, or 3, etc...)

## Posts

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**Create:** Click on **Posts** in the *Dashboard Navigation Menu*, and choose **Add New**.

**Edit:** Click on **Posts** in the *Dashboard Navigation Menu*, and click on the title of the post you want to edit **OR**, while logged into the site, find the post on your website that you want to edit. At the *top of your screen* in the *black navigation bar*, choose **Edit Post**.

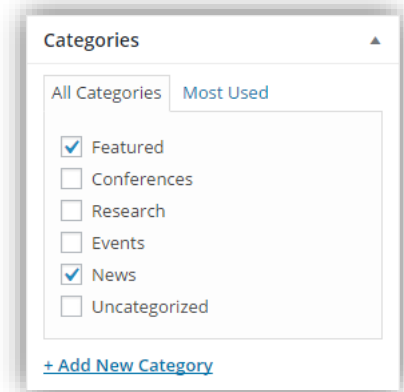


This administrator bar will have an **Edit Page** or **Edit Post** link present depending on the page or post you are viewing at the time.

**Categories:** Posts can be added to categories. Categories are used for the *Featured Content Slider*, widgets, and organizing site content.

To assign a post to a category, click on the **check box** next to one or more categories for your post. Or click on **Add New Category** to create a new category.

**Featured Image:** If the post you’ve created is going to appear on the *Featured Content Slider*, the image uploaded in this spot will appear as the graphic for the slide. It’s best to choose a clear and high resolution image.



### Featured Content Slider Options

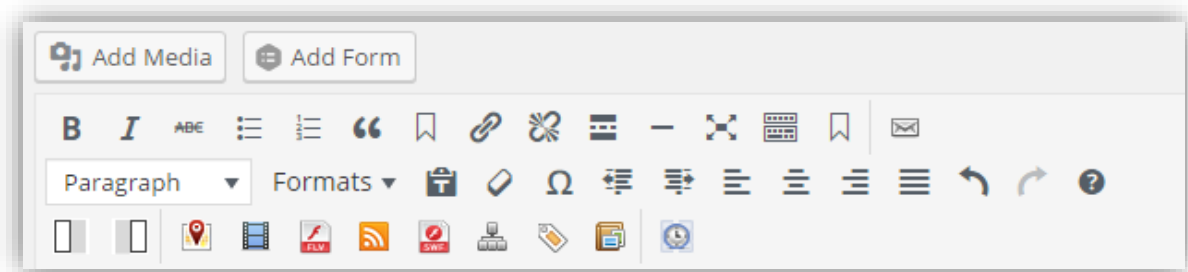
- **Button Text** – By default, all buttons on featured content slides will read as “Read More.” In this field, you can customize the button text.
- **Disable Image Effects** – removes the image effects for half-image slider images.
- **Full Width Image** – enable this option to make your featured image stretch across the entire width of the slide (if it’s a large enough image).
- **Disable Image Captions** – removed images captions for slider images only.

*(For more information on the Featured Content Slider, see page 4)*

**Excerpt:** Add your own custom excerpt for the post which appears on the featured content slider.

## The Toolbar

This is what you will use to create the majority of your page content. The toolbar has a set of icons that allow you to format your content, and add media to your pages and posts.

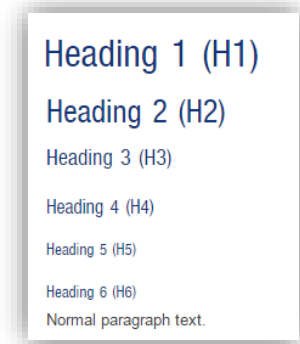


To use a tool, **highlight the text** you want to change, then click on a **tool bar icon** you want to use. For example, highlighting text and clicking on the **chain-link icon** will allow you to create a hyperlink using the text you’ve highlighted. *Note:* If the icon is going to insert something into your page, there is no need to highlight text first.

## Headings

By default, the title of your page or post will be formatted as a Heading 1 (H1) for Search Engine Optimization (SEO) purposes. You can choose any other heading size from H2 – H6 for the rest of the content, or choose normal paragraph text.

To change the heading size, **highlight the text** and choose an option from the dropdown list.



## Publishing

For pages and posts alike, the *Publish box* to the right-side of the edit page/post screen gives you a few options.

**Save Draft** – save page or post as a draft.

**Preview** – preview any changes you’ve made to the page or post on the site as if it were “live.”

**Status** – indicates what the status is of the page or post. You can edit this field to change the status. For example, you can change a “Published” page to a “Draft”.

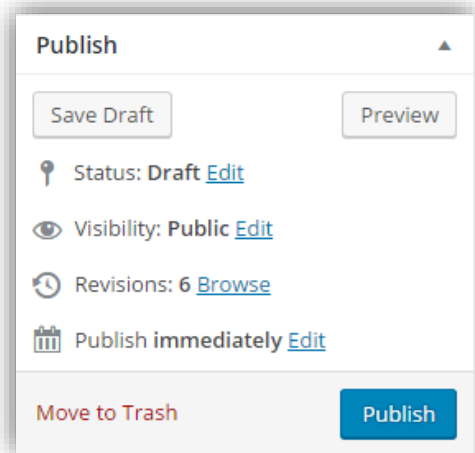
**Visibility** – change this setting to constrain whom is able to view the page. By default, it is set to Public.

**Revisions** – allows you to see who has revised the page/post, compare any changes, and revert to previous saved versions.

**Published** – either allow the page or post to use the default publishing time (immediately), or schedule a time to publish the page or post.

**Move to Trash** – move the page or post to the Trash where it will eventually be deleted.

**Publish/Update** – this button is the “save” button for your page/post.



## Media

To **add an image or other media** to your *Media Library*, click on **Media** in the *Dashboard Navigation Menu*, then click on **Add New**. For media that is located on your computer click on **the Upload Files tab** and then **Select Files**. Choose the files you want and click on **Open**.

To **insert media** into a page or post, click on the **Add Media** button in the *Toolbar*, then select the media file from the library and click on **Insert into Page**, or **Insert into Post**.

**Note:** Always add a description of the file in the “Alt Text” or “Alternative Text” field in order to remain accessible to visually impaired site visitors.

**YouTube videos** can be directly inserted into a page or post by pasting the URL of the video directly into the Rich Text Editor. WordPress will automatically embed it for you.

## Featured Content Area

On the main page of your site, you can build a *Featured Content Slider*. This feature is generated by the most *recently published Posts* within a *category* designated in **Theme Options**.

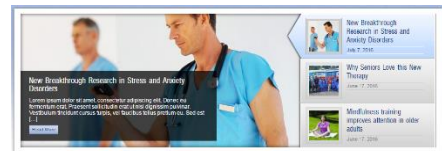
### Slider Selections



*Full Width Content Slider*



*Half Width Content Slider*



*Story Stacker*

**Create a slide:** Click on **Posts** in the *Dashboard Navigation Menu*, and choose **Add New**.

**Edit a slide:** Click on **Posts** in the *Dashboard Navigation Menu*, and click on the title of the post you want to edit **OR**, while logged into the site, find the post on your website that you want to edit, then at the *top of your screen* in the *black navigation bar*, choose **Edit Post**.

**Categories:** Posts must be added to a specific category (as determined by your site’s administrator) to appear in the featured content area.

To assign a post to a category, click on the **check box** next to one or more categories for your post. Or click on **Add New Category** to **create a new category**.

**Featured Image:** the image uploaded in this spot will appear as the graphic for the slide. It’s best to choose a clear and high resolution image.

### Featured Content Slider Options

- **Button Text** – By default, all buttons on featured content slides will read as “Read More.” In this field, you can customize the button text.
- **Disable Image Effects** – removes the image effects for half-image slider images.
- **Full Width Image** – enable this option to make your featured image stretch across the entire width of the slide (if it’s a large enough image).
- **Disable Image Captions** – removed images captions for slider images only.

**Excerpt:** Add your own custom excerpt for the post which appears on the featured content slider.

## Widgets

**Widgets** allow you to add blocks of code that will add new functionality to your site. Some widgets will not only add a feature to your site, but some can display the latest news, or events in your department, which keeps your page looking fresh and updated.

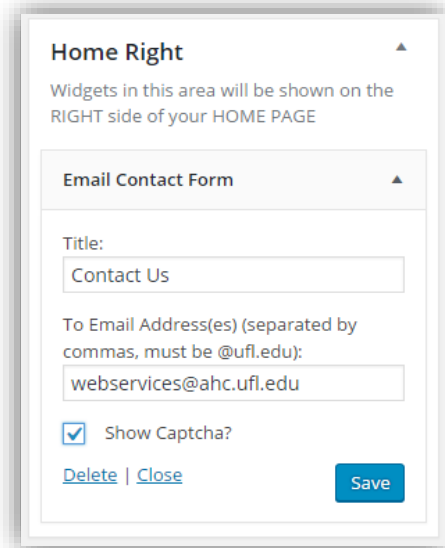
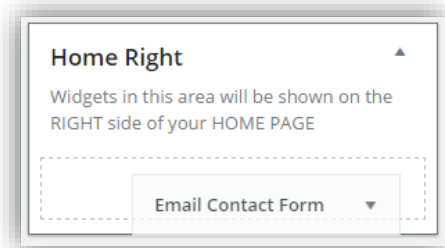
In the example to the right, an *Email Contact Form* widget, which will automatically create a web form for you, is added to the **Home Right** area. This means the widget will appear in the right-most column of the homepage. You can place widgets in the home page, site footer, page side bar and post side bar.

**Add a widget:** click on **Appearance** in the *Dashboard Navigation Menu*, and select **Widgets**. Select the Widget you want to place, and **drag and drop it** onto the home page/footer/sidebar area you want it to appear in. *More than one widget can be placed in the same area.*

### Available Widgets

- Archives – A monthly archive of the site’s Posts
- Categories – A list or dropdown of categories
- Custom Menu – Add a custom menu to your sidebar
- Email Contact Form – Email Contact Form
- Form – Insert a Gravity Form you’ve created
- Google Calendar – Insert a Google Calendar
- Image – Insert an Image
- Insert Page Content – Insert a page’s content into your widget
- Mailpoet Subscription Form – Subscription form for your newsletters
- Recent Posts – Lists your sites’ most recent Posts
- RSS v2.0 – Insert an RSS feed from another website
- Text – include text or HTML
- Video – Insert a video from YouTube
- And more...

A widget is dragged and then dropped into the “Home Right” area.



**Thank you for attending today's training. Please take a moment to take our online Training Evaluation:**

**<http://webservices.ufhealth.org/training-evaluation/>**

*Training Topic: WordPress Basics*  
*Facilitator: Nina Trombi, IT Training Specialist*