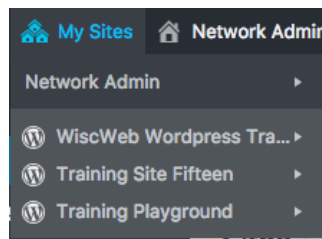


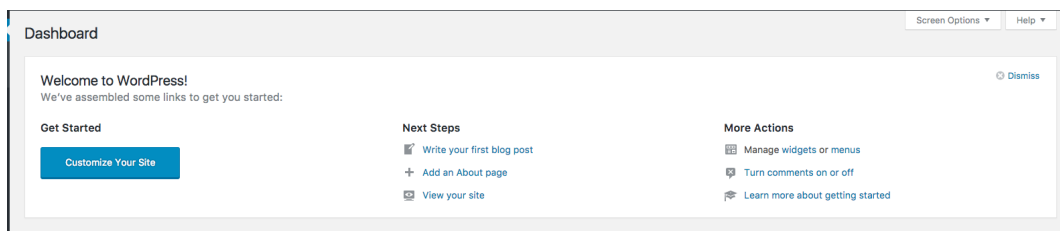
This training document is meant as a step-by-step guide to creating and delivering a UW-Madison site in the current UW-Madison theme. In this training class, you will learn how to log in to access your site, navigate the WordPress interface, customize your site, create pages, create posts, create custom menus for your site, and add content such as text and media (pictures, file downloads) to your pages and posts.

Logging Into Your Site

1. To log into your WordPress site, navigate to <https://wiscweb.wisc.edu/wp-admin/>. There, you will be prompted to log in via your NetID and NetID password. Enter those, and you will be logged into the WordPress system. You will want to make sure you choose the appropriate site to be in from the **My Sites** drop, as you may not log into the site you wish to edit. You will be brought to your Dashboard.



Your Dashboard gives you easy access to all of the items and tools that are within your Wordpress site. At the top of the screen, you will have a Get Started section that will give you a general idea of the steps to take to add items to your site.



Customizing Your Site

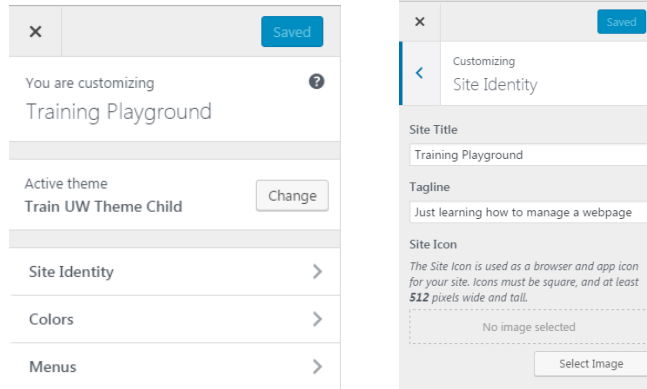
When you click on the Customize Your Site button from the Dashboard, or follow the menu path on the left for *Appearance* → *Customize*, you are taken to the Customizer screen with several menu options to start setting site-wide values.

This documentation will step through several of the options available to you.

Site Identity

Your Site Identity allows you to set the specific visual values of banner text and a tagline, as well as a customized Site Icon. The Site Title is the value that appears as your banner text at the top of your site, while the Tagline can be considered as a site “slogan” that appears just beneath the site title.

1. To change the Site Title, Tagline, and Site Icon, click on **Site Identity**.

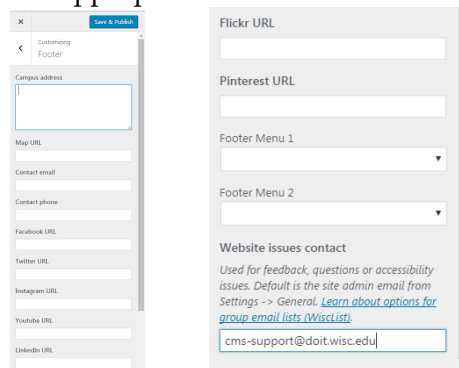


2. At the top of the screen, you will see the *Site Title* and *Tagline* fields. Click into each one and enter the information you'd like displayed.
 - Your *Site Title* and *Tagline* should not be exceptionally long, as these items need to resize appropriately when viewed on a mobile device.
3. You can also insert a *Site Icon* (or favicon) as well here. Note the size restriction of at least 512 pixels wide and 512 pixels tall. You can upload the item or choose it from your Media Library.
4. Once you have entered those values, and click on Save & Publish at the top of the screen.
5. Click the < at the upper left section of the screen to return to your Customizer menu.

Footer

Within the Customizer menu you also have access to update your information to populate the footer of your site. Click on **Footer** to access this section. The default footer is meant to contain contact information, social media links, and an email address to help with any site issues, as well as additional navigation menu options at the bottom of each page when you have created a custom menu (which you will learn about later in this training document). If you make any changes to these values, be sure to click the *Save & Publish* button at the top of the screen.

The *Website issues contact* field will default to the administrator email address for the site. You have the ability to change this address if necessary to a more appropriate contact.



You do not need to fill in each field, however when you do they will populate at the bottom with either text or icons.

A *Footer Menu* will be available once you have created a menu, which will be discussed later in the documentation.

Search Options

You have the ability to add a search functionality to your site through the **Search Options** screen. Clicking this, and then clicking the checkbox next to *Use search on this site* will enable this option. You can then choose whether to use the default WordPress site search or you can use a Google Search ID value to apply the Google algorithms and analytics to searches used on the site. For more information on creating a Google Search ID, visit <https://kb.wisc.edu/wiscwebcms/page.php?id=69294>.

Analytics

Analytics is an important function of a site that provides you with important information regarding the use of your site and your visitors. This includes browser use, geographical location, where did they access your site from, length of stay, pages most visited, and more.

For more information on creating and accessing your Google Analytics Tracking ID, please visit <https://analytics.google.com/> and <https://kb.wisc.edu/wiscwebcms/page.php?id=69291>.

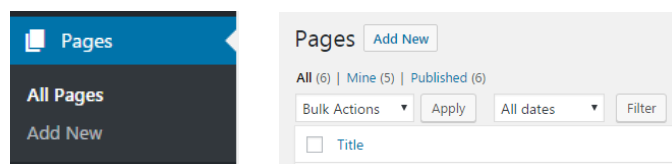
Site Content

The next section of this documentation will deal specifically with how do you create pages and posts, as well as adding content to your site for your audience to consume.

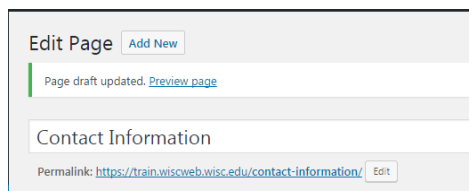
Creating Pages

Pages create the basic structure of a website, giving visitors areas to visit with pertinent information about your department or program. Pages are meant to be used for static content, or content that will likely not change much over a period of time. To create a new page, follow these steps:

1. Click on **Pages** in the left menu.
2. At the top of the screen, click on **Add New**.



3. A new page will be created for you. At the top of the screen, you are prompted to add a **Page Title**. This value will represent several things: it is the internal name of the page within your *Pages* section; it is the value that is generated as the window or tab title when a visitor comes to the page; and it is the default value that helps generate the “permalink” or *URL* value.

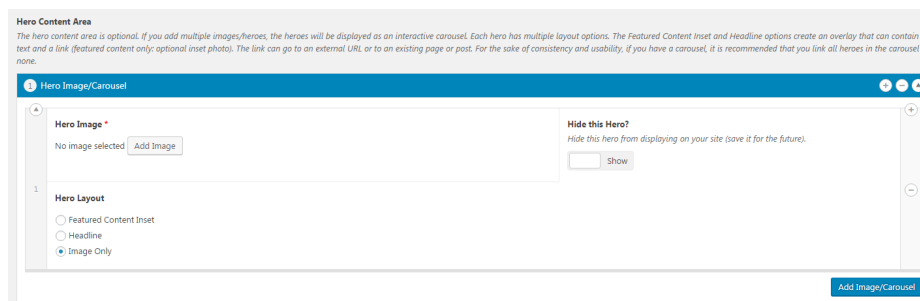


- **IMPORTANT NOTE** - Changing the permalink value *after* you have published the page breaks any existing links that are associated with that specific page. You will need to check and update any links that exist within your site if you make these changes. This would also affect anyone who had bookmarked this page.
4. The *Page Layouts* section allows you to change the initial default layout of your page. The default layout of a page is One Column, but as you will see there are three other options to choose from.



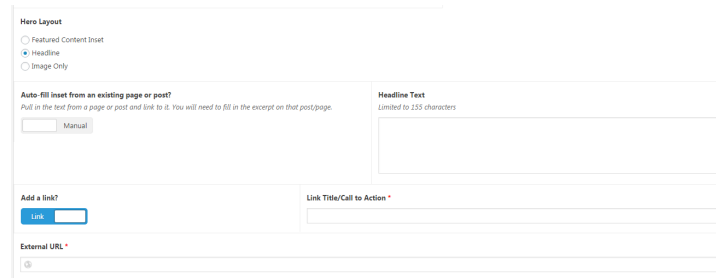
You will also have the option to add additional columnar layouts below using the *Add Content Layout* button.

5. The *Hero Content Area* allows you to add either a single banner image to the top of your page, or a photo carousel to the top. Please note that any image used in the hero image section should be a high resolution image.
- The Single Image hero image resolution size is 1600 pixels wide and 500 pixels high, and by default centers vertically if you choose an image that is larger than these dimensions.
 - For high resolution campus images, use the campus photo gallery at <http://go.wisc.edu/photo>.
 - Be aware that the most commonly found resolutions for monitors are 1920x1080 (desktop), and 1366x768 (laptop).
 - Click on the **Add Hero Content → Hero Image/Carousel** button to add a hero image.



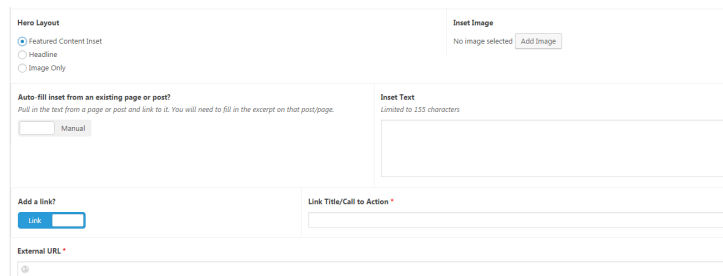
- To add an image to the content area, click on the *Add Image* button and choose an item from your Media Library.
 - **NOTE:** Be sure to add Alt Text to any image you use on a *wisc.edu* site.
- The *Hide this Hero* option would allow you to show or hide the hero image, in case you wanted to choose to display it at different times of the year. This option is based on each individual item you put into this content area.
- The *Hero Layout* section allows you to determine the style of the hero image.
 - *Image Only* – this option will display the image by itself at the top of the page, with no additional content applied to it.

- **Headline** – this option allows you to add a caption to the image, as well as potentially adding a link for users to click on. The *Auto-fill...* option allows you to create a link to another page or post within your site, which will auto-fill this information; the *Headline Text* field allows you to add text up to 155 characters; the *External URL* field allows you to add a URL to another site; and the *Link Title/Call to Action* field allows you to customize the text used for the *External URL* value.



The screenshot shows the 'Hero Layout' section with the 'Headline' option selected. It includes an 'Auto-fill inset from an existing page or post?' section with a 'Manual' button. The 'Headline Text' field is limited to 155 characters. There is an 'Add a link?' section with a 'Link' button, and a 'Link Title/Call to Action' field. The 'External URL' field is also present.

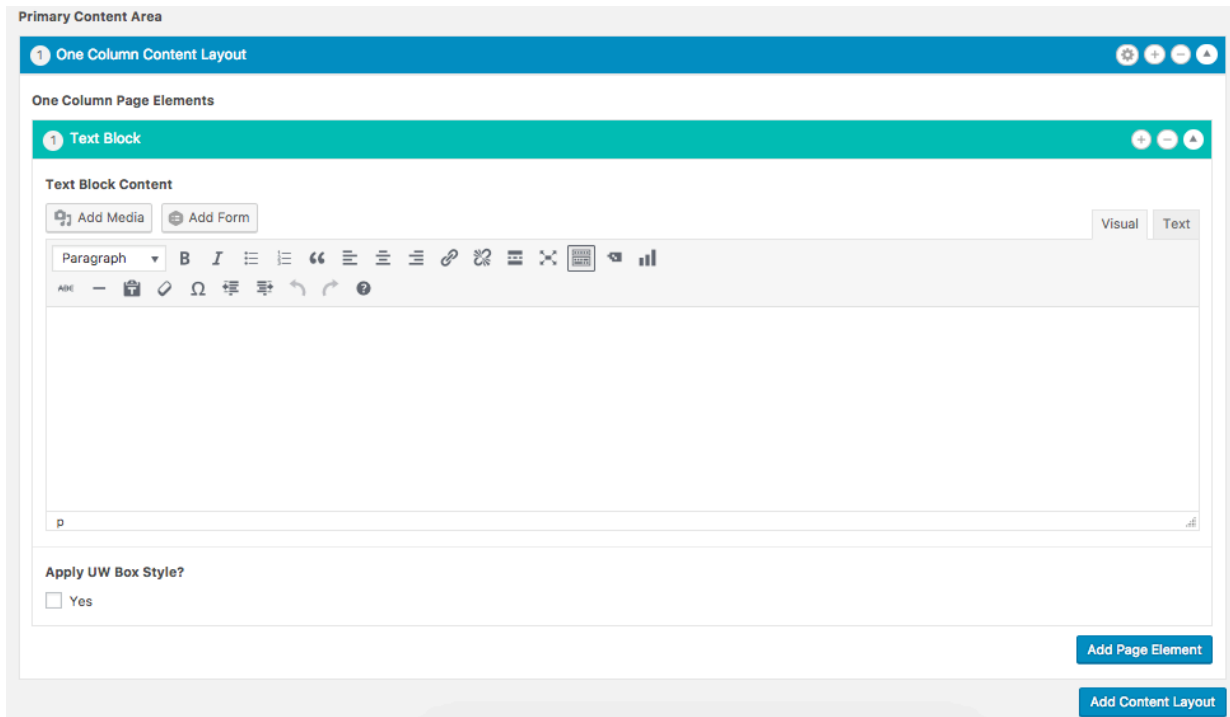
- **Featured Content Inset** – this option allows similar values to *Headline* option, but instead of a “caption” value, you are adding an additional image using the *Add Image* button. You can still add *Inset Text* up to 155 character, a link and a call to action value.



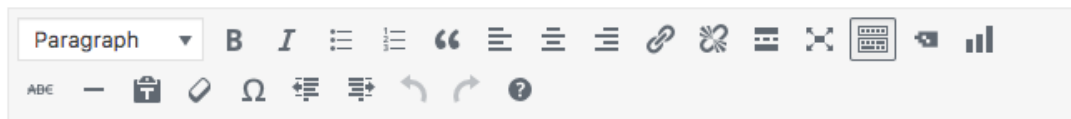
The screenshot shows the 'Hero Layout' section with the 'Featured Content Inset' option selected. It includes an 'Inset Image' section with a 'No image selected' status and an 'Add Image' button. The 'Auto-fill inset from an existing page or post?' section has a 'Manual' button. The 'Inset Text' field is limited to 155 characters. There is an 'Add a link?' section with a 'Link' button, and a 'Link Title/Call to Action' field. The 'External URL' field is also present.

- To turn the hero area into an image carousel, click the *Add Image/Carousel* button below, and an additional hero section will be added. Continue doing this for any images you want to add. Each image can have one of the options listed above.
 - **PLEASE NOTE:** if you are going to use an image carousel on your site, it is recommended to limit the number of images that are used.

6. The default **Primary Content Area** for a one-column layout is a *Text Block*. Most, if not all, of your content will exist within *Text Blocks*. You can type directly into the Text Block, insert images, embed content, and link to other documents or sites.




7. You can add additional content elements (such as accordion panels, tab groups, groups of links, etc.) to your page by clicking on the *Add Page Element* button and choosing from a list. For more information regarding page elements, please visit <https://wiscweb.wisc.edu/page-elements/>. You can also add additional columnar layouts by clicking on the *Add Content Layout* button.
8. The *Text Block* formatting toolbar contains several options. Use these to format your text for your audience.



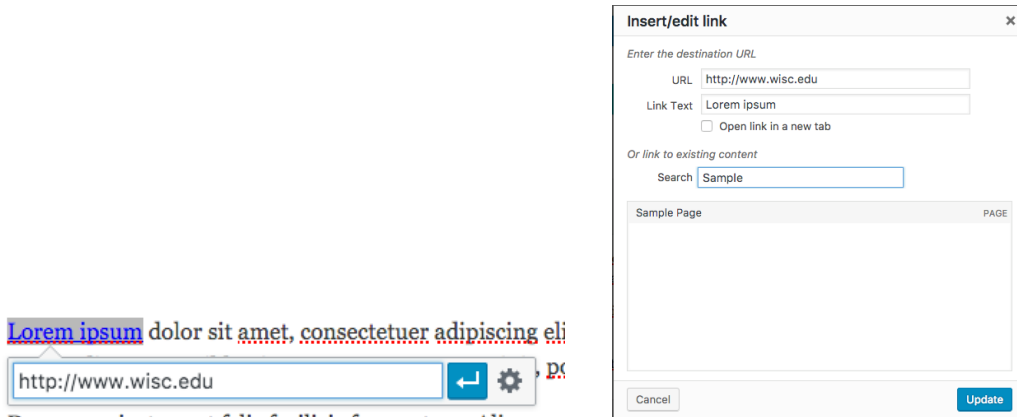
From left to right, on the first row of icons, the formatting options are: Style dropdown; bold; italicize; bulleted list; numbered list; blockquote; align left; align center; align right; insert / edit link; remove link; insert read more tag (this does not work on Pages); fullscreen; toolbar toggle (to show second row of formatting icons); Insert a wpDataTable (WiscWeb plugin); Insert a wpDataChart (WiscWeb plugin).

The second row of icons are: strikethrough; horizontal line; paste as text toggle; clear formatting; special character; indent left; indent right; undo; redo; keyboard shortcuts.

Adding Links

1. To add a link to your page, you have two options. First, you can highlight the text that you want to use as the reference (linked) text, click the **Insert / Edit Link** icon .
2. A popup window will appear asking you to either paste / type in the URL that you want to create the link to (if external), or begin typing in a keyword that will show all content items (pages, posts, etc.) that

match that value – this will create an internal link) of the page you have already created (for an internal link). You can also click on the gear icon for more options to linking within your text block.

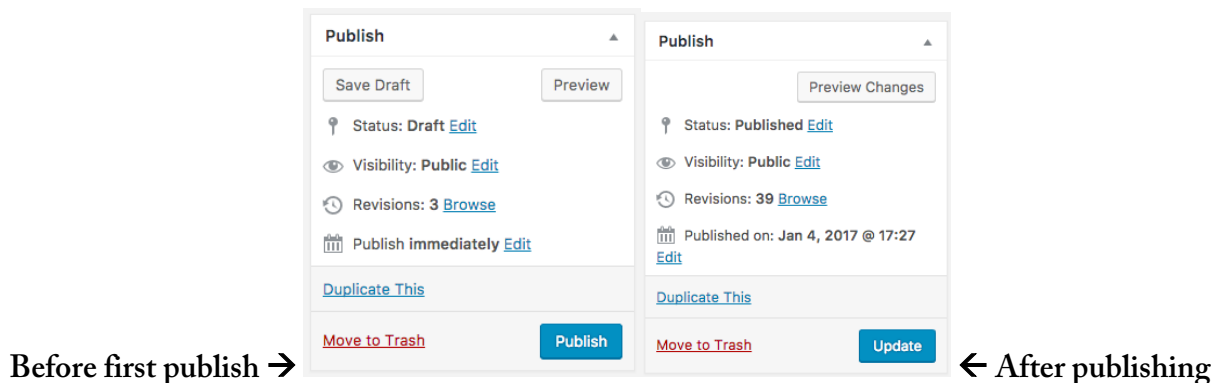


3. The second option that you have for linking is to link to an item from your Media Library. Place your cursor in the location you want to place a link to the document, and click the **Add Media** button at the top of the formatting toolbar.
4. Search your media library from the document you want to insert, select it and observe the *Attachment Details* section at the right of the screen. The Title value that appears is the default text that will be displayed as the link when you add this linked document. Update that to an appropriate linked text, and choose the *Insert into page* button in the lower right corner of the screen.
9. If you need to change the linked text, highlight the item, click the pencil icon to edit, and when the link dialog box appears click on the gear icon to the right. From there, you can change the Link Text to something else.

At the bottom of the page, you can add an additional image by clicking on the *Add Lower Content* button. This will allow you to add another hero (high resolution) image.

Publishing Pages (and Posts)

Once you have added the content to your page, at the top right of your screen you have several options for saving and publishing your page.



You can continue to save the page as a draft by clicking on the **Save Draft** button – please note that if you have a page in production, switching the *Status* of your page to **Draft** will remove the page from the production site, meaning your audience will not have access to it until you publish it again. You can preview what the page will

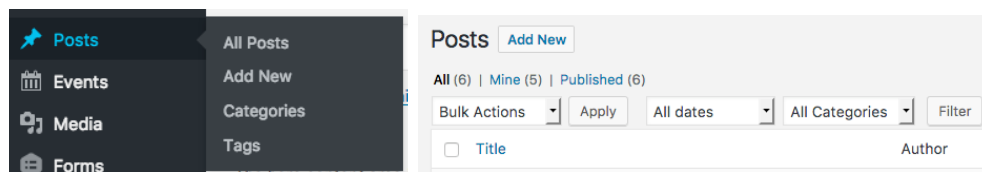
look like by clicking on the *Preview* button – or after you have published the page, you can click on *Preview Changes* button. To make the page live, click on the **Publish** button – once the page has been published once, you can click on **Update** to commit any changes you are making.

Continue to add additional pages to your site using the instructions provided above.

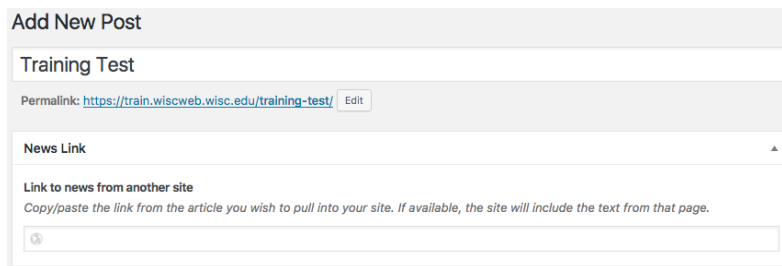
Creating Posts

You can also use posts to display content for your audiences. Posts are intended to provide a reverse chronological order of posting items and are usually used for blogs, news articles, and announcements. To add a new post, follow these step:

1. Click on **Posts** in the left menu.
2. At the top of the screen, click **Add New**.



3. A new post will be created for you. At the top of the screen, you are prompted to add a *Page Title*. This value will represent several things: it is the internal name of the post within your *Posts* section; it is the value that is generated as the window or tab title when a visitor comes to the post; and it is the default value that helps generate the “permalink” or *URL* value.
 - Try not to use titles for posts that you have used in the past, as this could cause problems with indexing and searching for items within your site.



4. Below the post title section is the ability for you to add a link to an external site’s news article. This is especially beneficial if you’d like to link to news articles that appear at <http://news.wisc.edu>.
 - Be aware that if the article that you are linking to uses the *Excerpt* option, you will not be able to insert any body text into your post. However, if there is no excerpt, you will be able to add body text. You will likely not know this until you preview the post.
 - It is also a good idea to use the same title for your post as the one you will be linking to for consistency.
5. Below the title is the Text Block text editor that you can add whatever content you would like into the post. The same options apply here as did with the Text Block on pages.
6. At the right side of your post page, there are several options to consider as you are creating your posts.

- **Categories** are more of broad topic ranges that allow posts to be further refined into groups of thoughts, allowing you to sort and group content for easier management. Categories could include News, Events, etc. Categories can also be used when you create a custom menu.
 - To select a **Category**, click in the check box for the appropriate selection.
 - To add a new category, click the *Add New Category* link. Type in your new category and hit the *Enter* key.
- **Tags** allow you to further refine the sorting and grouping abilities of posts you make on your site. Posts that use the same tag can be grouped together by clicking on the *Tag* in a post.
 - To apply a **Tag**, type the value in the tag field and click the *Add* button. You can also see what tags you most often use by clicking on the *Choose from most used tags* link.

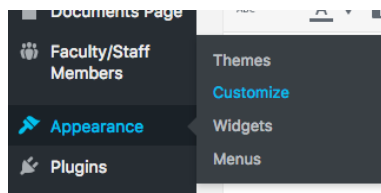
Once you have added the content to your post, at the top right of your screen you have several options for saving and publishing your post.

You can continue to save the post as a draft by clicking on the **Save Draft** button – please note that if you have a post in production, switching the *Status* of your page to **Draft** will remove the post from the production site, meaning your audience will not have access to it until you publish it again. You can preview what the post will look like by clicking on the *Preview* button – or after you have published the post, you can click on *Preview Changes* button. To make the post live, click on the **Publish** button – once the post has been published once, you can click on **Update** to commit any changes you are making.

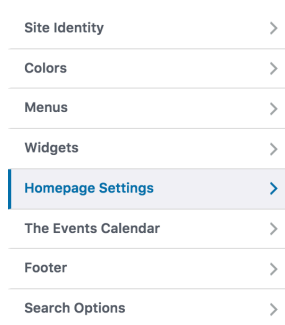
Setting A Home Page

By default, your site's landing page (or static home page) will be the *Latest Posts* page, which lists the most recent posts for your site. After you have created several pages, you can now define one of them to be the *Home* or **Static Front Page**. To define a Static Front Page, follow these steps:

1. In the left menu, hover your mouse over **Appearance** menu, and choose **Customize**.

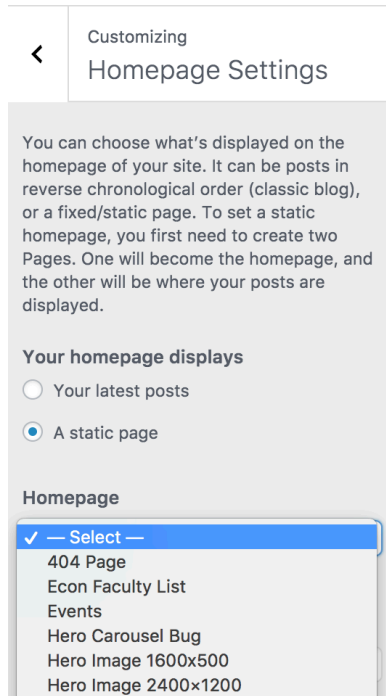


2. In the Customizer menu, choose *Homepage Settings*.



3. You are presented with two radio buttons. To set a home page for your site, choose the radio button for *A static page*.

4. You are then presented the option to set which page that you have created should be the static front page for your site.

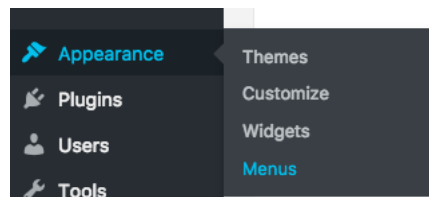


5. Choose the page that you want to set as your home page, and click *Save & Publish* at the top of the screen.
6. You can also define another page that you have created to be the *Latest Posts* page if you want to use that option later on for your audience.

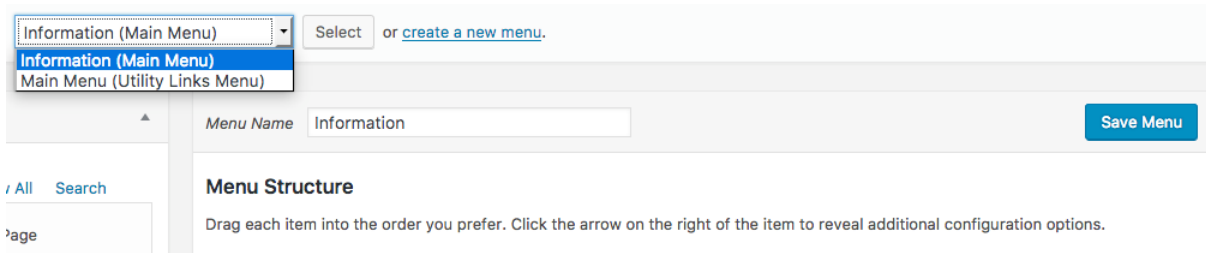
Creating A Custom Menu

Once you have a set of pages and posts created, you can now create a menu or set of menus to use for navigating your site. These menus can be used in several different ways, either as the main menu or utility menu, in a footer, or custom content area. To create your custom menus, follow these steps:

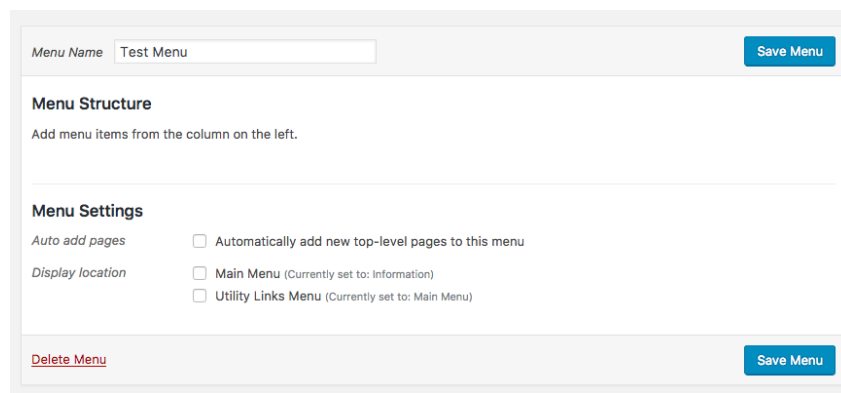
1. Hover your mouse over the **Appearance** option in the left menu, and choose **Menus**.



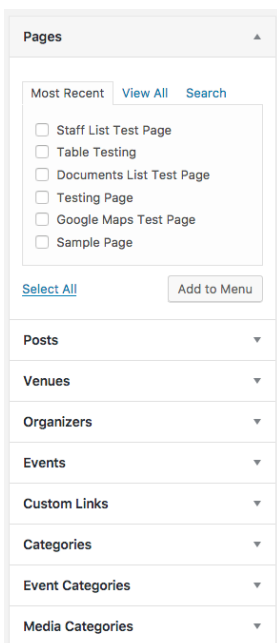
2. If you have menus already created, you can access them by clicking in the drop down menu and selecting it.
3. To create a new menu, either click the *create a new menu* link, or if you have never created a menu before you would simply need to input a name for your new menu in the *Menu Name* field and clicking on **Create Menu**.



4. Within this new menu, in the Menu Settings section, you can define if and where this menu will be visible. The *Main Menu* selection will place this menu at the top of your page, in the standard menu location; the *Utility Links Menu* is a menu that appears in the upper right section of your site.
 - The Utility Links Menu could be considered a secondary menu, where users may be able to access specific items quickly, rather than going through pages and sub-menus.



5. You now have several options for adding pages and determining navigation location for this custom menu:



- To add **Pages** to your menu, look in the *Pages* section to the left and click in the check box for the pages that you want to add to your menu. Once you have your pages selected, click the Add to Menu button.
- To add a **Post** to your menu, click in the *Posts* selection on the left, click in the check box for the post(s) that you want to add to your menu, and click the Add to Menu button.
- You can add **Custom Links** to your menu by clicking in the *Custom Links* section on the left.
 - In this section, you have two options - you can create an external link, or you can create a Navigation Header link by simply putting in a pound sign / hashtag (#).
 - When adding pages to a submenu in your Main Menu, first create the Navigation Header
 - You can then add pages to this submenu by dragging them beneath the Navigation Header section.

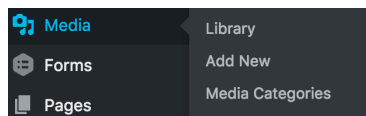
6. The **Custom Links** section also allows for you to add external links by adding the *URL* and a *Link Text* which would appear as the menu label.
7. Using *Posts*, you can also add **Categories** as menu items as well. Click in the check box for the categories that you want to add to your menu, and click the *Add to Menu* button. When a user clicked on a **Categories** link, they would be taken to a list of all posts created within that category.

Once you have created your menu, be sure to click the **Save Menu** button and check your site to make sure your menu appears as you intended. Once you have created your menu, you can reorder your navigation structure by using drag-and-drop functionality.

Note that there are other page elements that can use custom menus as their content items. These include *Footer*, *Group of Links*, and *Alternating Text Blocks*.

Working with the Media Library

The *Media Library* is your file repository, where you will store any items that you plan to use within your site - either images or documents. To access your library, click on the **Media** menu option in the left menu.



- To add new items to your **Media Library**, you can either drag and drop an image or document onto the *Media Library* screen or click the **Add New** button at the top of the screen.

- You can view your library in either thumbnail or list view; you can view different types of media specifically; you can view images uploaded from a particular month; and at the far right is a search field.
- While you can add items to the library on the fly while you are working within pages or posts, this section will provide a bit more overview of the library.
 - Items in the media library are sorted by date added by default, and your initial view of the library is thumbnails. You can change the view and sort order by clicking on the list view (left) icon. You can change the sorts by clicking on the various headers at the top of the library.

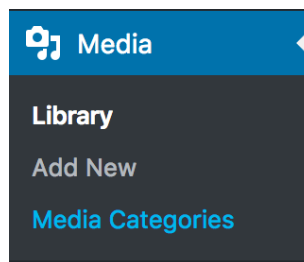
<input type="checkbox"/> File	Author	Media Categories	Uploaded to		Date
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- You can click on an item to see more details about it, as well as edit some of those details:

- When editing an image, note these items:
 - You can change the *Title*, add a *Caption*, provide *Alt Text*, and add a *Description* for the image.
 - Please note that if you added a caption to the image within the Media Library, and you place that image on a page the caption will appear by default. You can delete or edit the caption once it is placed on a page.
 - Also note that *Alt Text* is an important piece of inserting an image, as it is necessary to meet campus accessibility requirements. For more information regarding accessibility policies at UW-Madison, please visit <http://go.wisc.edu/hy2acj>.
 - You can also edit the image itself by clicking on the Edit Image button. Here, you can crop the image, rotate it, scale it, and apply the changes that you want to make to particular versions of the image.

The WiscWeb service uses the **Enhanced Media Library PRO** plugin to help better manage the items that you place in your Media Library. This Plugin allows you to create and apply categories to your items, to allow for better filtering of your library later on. To add Media Categories to your Media Library, follow these steps:

1. Hover your mouse over the **Media** menu option on the left, and choose **Media Categories**.

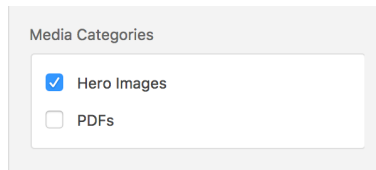


2. In the next screen, you can begin adding the categories that you would like for your media items. Simply give the category a *Name* (like PDFs), a *Slug* (the “slug” is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens. For example, media-pdfs), a *Parent* (which would allow you to create child categories for better sorting internally), and a *Description* (to further define the use of this category for yourself or others).

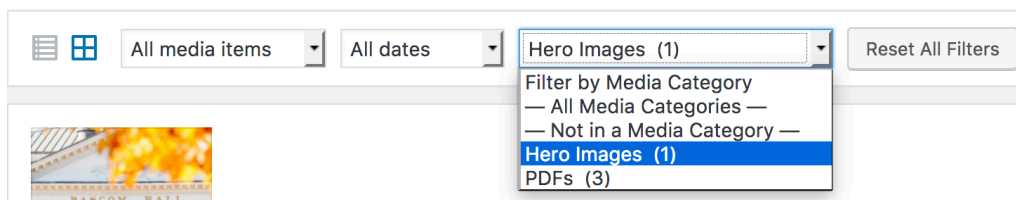
Name	Description	Slug	Count
Hero Images			2 Items
PDFs		pdfs	3

3. Once you have entered that information, click the **Add New Media Category** button.

4. After creating your categories, you can now apply those categories to items that are within your *Media Library*. To do this, click on Media in the left menu, and your media library will appear once again.
5. To apply Categories to your existing media, click on a media item to select it. In the right side of your screen, the *Attachment Details* screen will appear. Scrolling down, you should see a **Media Categories** section, with check boxes next to the media categories that you have created.



6. Now that you have added categories, you can use the selections at the top of the screen to filter those items to easily find specific media items.



Additional Resources

- Knowledge Base - kb.wisc.edu/wiscweb
- WiscWeb Service Information Site - wiscweb.wisc.edu
 - Training
 - Features – Page Elements, Hero Content Area, Layouts
 - Resources – Campus Resources (Accessibility, University Marketing, Campus Photo Library)
 - Login
- Support Email - cms-support@doit.wisc.edu
- WiscWeb Email List - wiscweb-users@lists.wisc.edu
 - Be sure to join this for updated information regarding the service.