

Training Guide //

The Royal College of Ophthalmologists

WordPress Guide

Thursday, 08 January 2015



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WordPress

Introduction

WordPress is the content management system that enables you to make content changes to your front end website.

Logging In

To login to WordPress, please follow the below URL and enter your username and password:

<http://rcophth.phewinternet.com/wp-login.php>

UN: provided in training session

PW: provided in training session

Pages

Pages are what make up the bulk of the website.

Page list and editing access

To access pages click the pages link on the left hand menu, this will list out all of the pages you have access to edit. To enter a page to edit it either click on the page title or hover over the page title and click edit.

From this listing page you can order the pages by the titles at the top e.g. 'Date' and you can also use the search facility on the top left of this screen to locate a particular page.

A note on the site map

An alternative way to find a page on the website or view the entire structure of the website you can visit the site map page where all pages are listed. Simply click on the page you would like to view it, in addition to this if you are logged in you will be able to edit the page there and then using the black bar at the top of the screen 'Edit page'

Editing a page

Title

The first box at the top of the edit screen is the title of the page, this is used by the website as the main heading for the page and is also used by menus on the website.

Editor

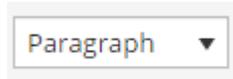
Directly below the title is the editor window and this defines what the main text (the body) of the web page is. The use of this editor will be covered in detail in the training session and is very much like a standard text editor such as MS Word with some notable exceptions:

To access an increased set of options for the editor click on this button at any time:



Paragraphs and headings

Each block of content in the editor has a style applied to it, this is typically 'Paragraph' denoting a paragraph of text. It is important for website flow, structure and accessibility to break up a page with headings using the header style drop down:



To do this select a paragraph and click this drop down and select a corresponding heading. You should never select a 'Heading 1' this is used by the page title the flow should then follow in sequence:

Headings should be used to break a page up into manageable sections. An example of this is below; they have been tabbed out to show the relationship.

Heading 2

This is introduction text about cars

Heading 3

This is text about a blue car

Heading 4

This is text about a blue car with red wheels

Heading 2

This is introduction text about bikes

etc....

Hyperlinks

By highlighting some text and clicking on the link tool:



You can link to another website or page on the website:

Insert/edit link [X]

Enter the destination URL

URL

Title

Open link in a new window/tab

Or link to existing content ▲

Search

Information Booklets	PAGE
Ophthalmic Specialist Training Curriculum FAQs	PAGE
Resources	PAGE
Clinical Guidelines	PAGE
Patient Information on Paediatric Eye Conditions	PAGE
Corneal Disease	PAGE
Cataract	PAGE

Cancel Add Link

Simply search for the page you wish to link to in the search box or enter the website directly in the URL box (including http://) and click add link.

Accessibility Tip: Always ensure you add a title to hyperlinks describing the link in a sentence to aid accessibility

External website Tip: Always tick the 'open link in a new window' checkbox if you are linking to an external website, this will ensure the viewer is not taken away from the website.

Publication Links

The site uses a system to easily manage publications instead of using hyperlinks (covered later in this document) this allows for publications to be added to multiple pages and updated in one place to save time.

To add a link to an existing publication click in the editor where you would like the link and click the following button:

Add Publication Link

This will bring up a window as below:

Add Publication Link ✕

Please select a publication below using the filter search or select a publication manually. You can also enter a title which will be used as the link text to the publication, if you leave this blank the main publication title listed will be used as the link text.

Title (optional):

Filter:

Show Cover Image:

Select Publication

- A letter publication
- Ab Publication
- Example Publication
- test
- X Publication

This will list all of the publications on the site, you can locate the one you would like by typing into the 'Filter' box which will narrow down the list.

You can select the publication you would like to insert by clicking the radio button next to it and then clicking the 'Select publication' button.

There are two additional options on this screen, page title and show cover image. By entering a title the link to the publication will have that title as the link text, if you leave this blank the link text title will use the title of the publication in the list.

If a publication has a cover image (covered later) selecting this checkbox will apply that image to the page when viewed.

After clicking select you will notice a code is added to the editor e.g.

```
[publication id="1104" img="1"]
```

This is called a short code and when the page is saved this code will be replaced with the publication link.

Other page options

A page had a variety of other options which we will cover below

Page Tags

Page tags are used as a mechanism to 'tag' pages with specific key words for use on the front end of the website for readers. For example if our page is about a red racing car event we may add the tags 'racing', 'cars', 'event', 'london'.

It is normally a good idea to not go overboard with tags but to select a few key words which describe the page. Over time users can click these tags to find similar pages on that topic.

Departments

Each page will belong to a department within the college. You will likely never need to amend this unless responsibility or structural changes take place regarding pages within the college website.

Search Criteria Options

There are two fields in this section which are search excerpt and keywords. Text entered into these boxes will be used by the site search (and search engines) to help facilitate the searching of pages.

The excerpt can be a short readable description or summary of the page

The keywords are much the same as tags but directly used by the search so are not front facing, it is often a good idea to use keywords that might be misspellings of terms used in the page e.g.

Oculaplastic.

Additional Page Options: Review Options

A review date can be added under 'review date'. This will set a date in which you will be emailed as a reminder to review the content of this page.

Additional Page Options: Main Page Options

Featured image is used here to associate an image with this page (not currently used on the main website)

Apply More Information Form can be selected to add a form underneath the body of this page when viewed which will allow a reader to request more information on this page. You can modify who this form sends to by editing the box underneath this 'Form Email Address'

Additional Page Options: Side Bar Options

This tab allows you to modify what appears on the right sidebar of this page and is useful for bringing certain content to a reader's attention.

Show News/Events/Twitter Feed – This will show a feed of the associated title on the side bar.

Custom Side Bar Items

This tool can be used to apply an unlimited number of snippets of content to the right side bar of the page. For example you may have a list of useful links you would like to show in which case you would add this link so:

Custom Side Bar Items
 You can use the tool below to add a series of custom items which will appear on the side bar.

Heading (optional)	Content
useful links	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Add Media</p> <p>File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾</p> <p>B <i>I</i> <u>U</u> “ ” ABC [List Icons]</p> <p>- google - yahoo - hotmail</p> <p>ul » li » a</p> </div>

[Add Item](#)

Page Attributes: Parent relationships

Pages do not typically have a category structure but work with a system called parent and child relationships.

The premise is that a page sites in a specific part of the site in a tree like structure and that structure is defined by what child a page is part of.

When adding or editing a page you can amend this relationship via the page attributes panel on the right of the page.

Page Attributes ▲

Parent

(no parent) ▼

If a page has no parent then that page is said to be a ‘top level’ page.

Clicking on this drop down you may wish to make a page appear in a specific section of the site instead of being at the top level. For example you may already have a top level page called ‘About us’ and you are creating a new page called ‘Our History’. From the drop down you would select the parent as ‘About us’.

On saving the page (Our History) would be a child of the about us page e.g. /about-us/our-history

You can stack further pages as children whom themselves have children to as many levels as you like. E.g.

/about-us/our-history/history-images

Typically we find two to three levels is generally enough for most websites and anymore can become confusing to users of the website.

Note: You may not have access to this option

Page Attributes: Templates

Pages are often made up of different templates; these can display the page in a different manner when viewing the website online. These are selected on the right hand side of the page under the parent drop down. Typically unless instructed this is always set to 'Default Template'.

Page Attributes: Order

Page order is under the template drop down and is simply a numerical means to order pages. So if you had two pages:

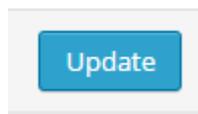
Our History

Testimonials

You could give 'Our history' the number 1 and 'Testimonials' the number 2 and the site can use this order to display the pages. If left blank the site will generally revert to either alphabetical or date based ordering.

Updating a page

When you have finished updating your page you simply need to click the update button on the top right of the screen to save your edits.



Here you also have the option to review previous revisions of the page should you ever overwrite something or make a mistake!

Adding a page

To add a new page you simply need to click the 'Add New' link from the left hand menu under 'Pages'. The process of editing a new page is exactly the same as updating a page with the following exception.

You will likely need to submit a new page for review as entirely new pages will need to be approved. To do this you can click 'Save Draft' whilst editing the page to save a draft of the page to work on it later, when you wish the page to go live on the website you can click 'Submit for Review'

Save Draft Preview

 Status: Draft

 Visibility: Public

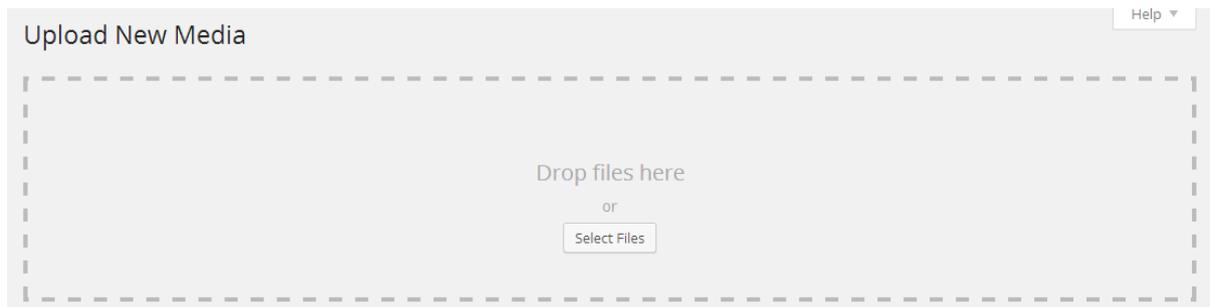
Submit for Review

Media

Any images/PDFs or other media you upload to your site will be shown in the media section on the left hand menu. You can directly upload an image to your media section, but it tends to be quicker to upload it to the page / post you're working on (WordPress will then store it in your media section)

Adding media in the main media manager

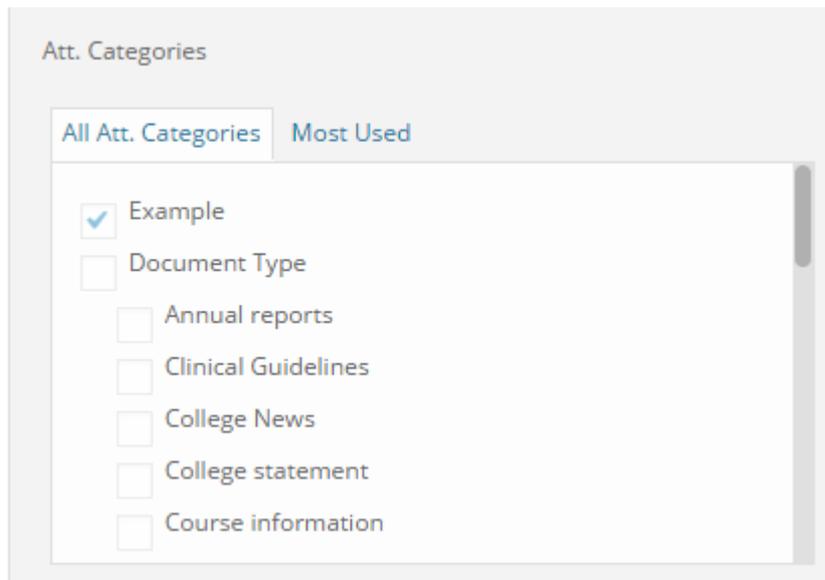
Click media from the left hand menu and then click 'Add New'.



From here you can simply drag and drop a file from your computer or click select files and browse. This will upload the file which can then be viewed by clicking 'Library' from the left hand menu. Once the file is uploaded it can be used in other parts of the site.

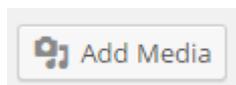
Media Categorisation

Once media has been uploaded it is useful to assign it to a variety of categories. This will make it significantly easier as the site grows. Typically giving the file a 'file type' category and another category will usually be enough.



Adding media on the fly within pages/post content and media selector buttons.

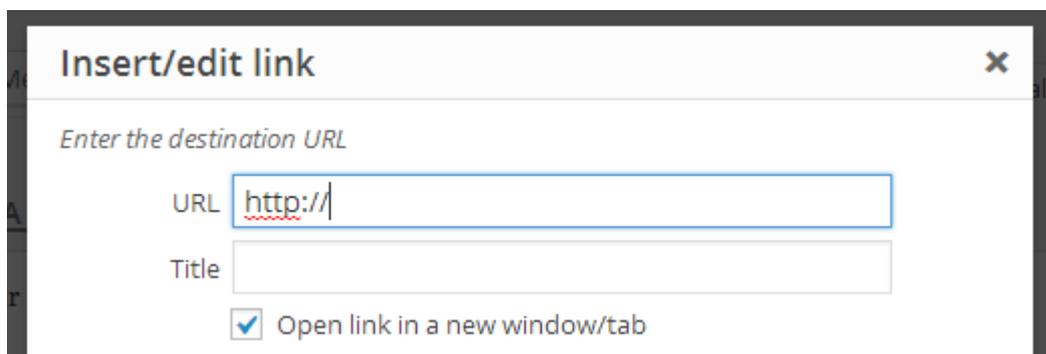
You can add media to the main content area of a page or post by clicking where you would like the media to appear and then by clicking the add media button or Media selector button.



This will present you with a library of media already uploaded to choose or search from or you can upload files immediately here by clicking the upload tab.

On clicking on a file an 'Insert into page' or 'Select' button will appear in the bottom right hand side of the window to insert that file.

A note on documents: When inserting a link to say a pdf or word document it is wise to edit the created link (click on the link then click the chain icon) and then click open in the window

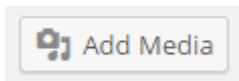


This will ensure the document loading does not take the user away from the website.

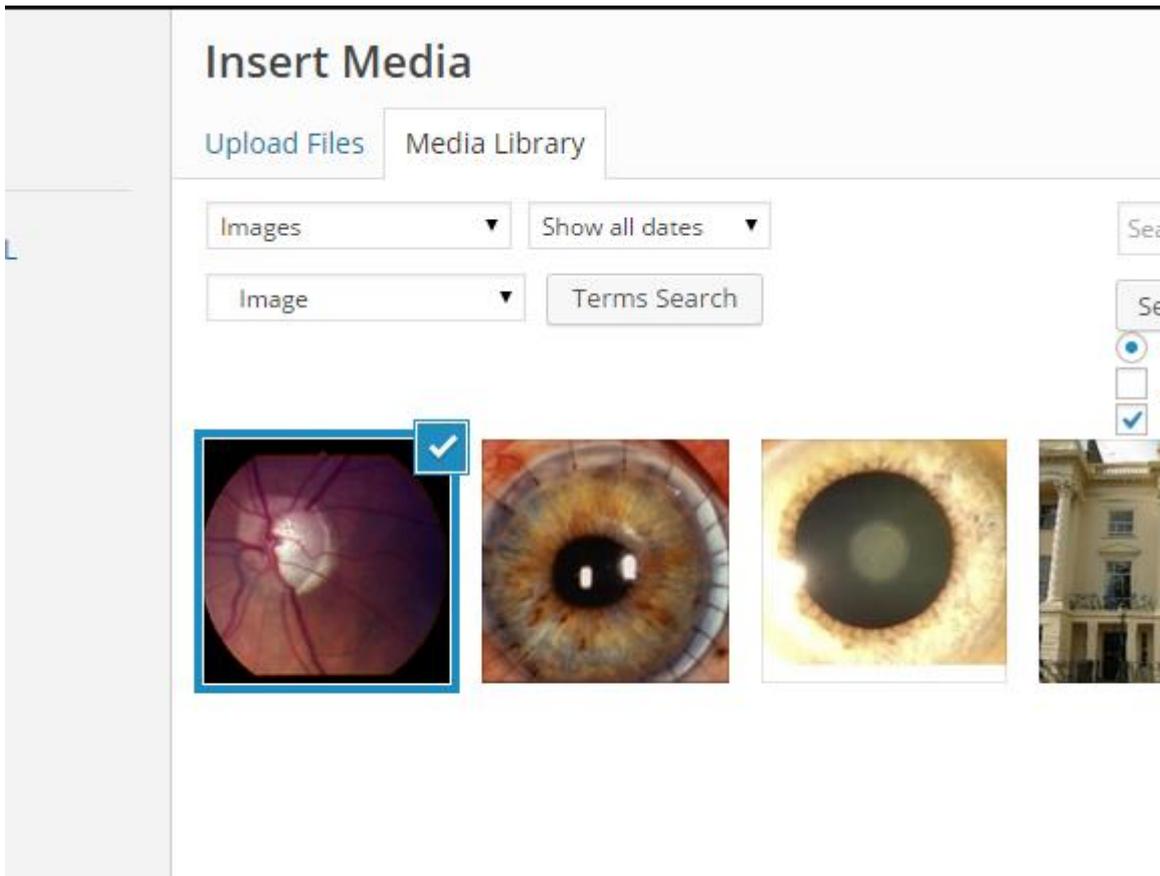
Inserting an image to the page

Images are added to the page from the media library (they are uploaded and categorised like all other files).

To add an image to a page click in the editor where you would like the images and then click the Add Media button:



From the popup find an image you would like to insert using the categories drop down or the search and then click on it:



The next step is to consult the option menu on the right and then click in 'insert into post' button.

ircn
nd or Title Name
LT Text Caption
escription Terms



image-513-250-0-0-0-95-8.jpg
25th November 2014
12 kB
250 × 193
[Edit Image](#)
[Delete Permanently](#)

URL

Title

Caption

Alt Text

Description

Att. Categories <- Click to toggle

Att. Tags <- Click to toggle

ATTACHMENT DISPLAY SETTINGS

Alignment

Link To

Size

[Insert into post](#)

These options on the right can be tweaked before inserting the image, these are detailed below:

URL	This is not editable and is the address on the website of this image
Title	This is the title of the image, this should be used if additional information should be provided to support the image.
Caption	Captioning is not used on the RCOphth website so can be ignored
Alt Text	Alt Text should always be added describing what the image is, this is important for visually impaired users as a screen reader will read this text out to the user.
Description	A longer description for the image, this is not used on the RCOphth website directly but may be useful internally to keep notes on an image
Att. Categories	The categories attached to the image can be changed here
Att. Tags	Att Tags are not used on the RCOphth website but can be added if needed for searching

	for media.
Alignment	The alignment of the image on the page. For example if left is selected then the image should float to the left and text should wrap around it to the right.
Link To	Generally this is changed to 'none'. This can click the image to the bigger version of its self or another link entirely e.g. another website.
Size	When an image is uploaded to wordpress it is resized for you. From here you can pick a size most appropriate for the space you wish to add it.

Once you have inserted your image you can click on it to edit some of the common parts of it:



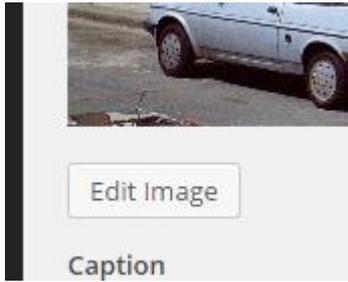
You can resize it manually using the 8 placeholders, delete it from the page and also adjust the alignment.

A note on editing images

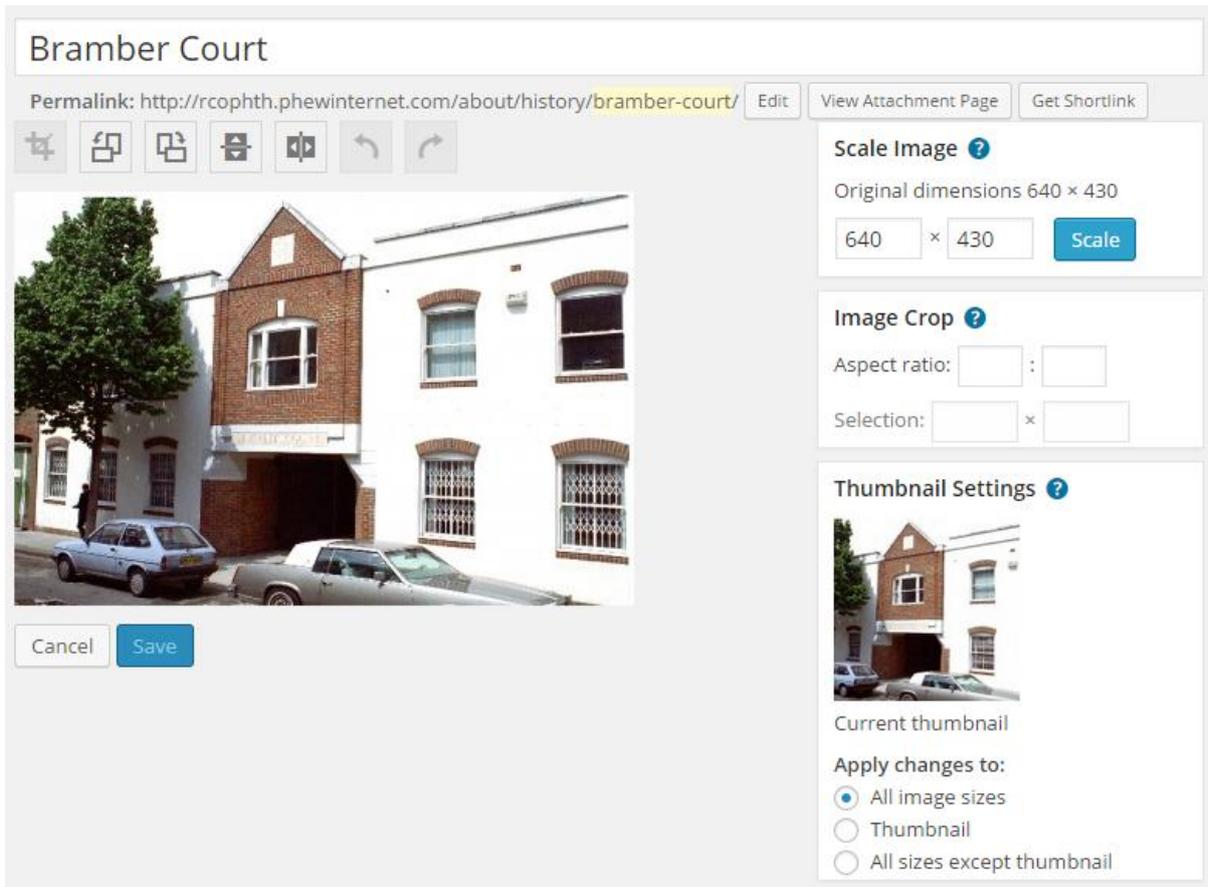
This is advanced functionality but is worth acknowledging in this document. From the [media library](#) you can locate an image



From here you can click:



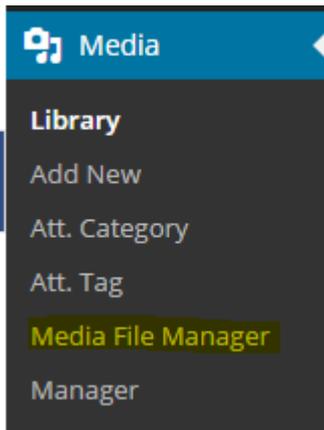
This will bring up the WordPress image editor which will allow you to modify this image such as cropping it or resizing the original:



Restricting Files to the Members' Area

To ensure a file in the media library is only accessible to members and not the general public you will need to perform the additional few steps after uploading the file to the media library.

After uploading the file click on the media file manager and click edit:

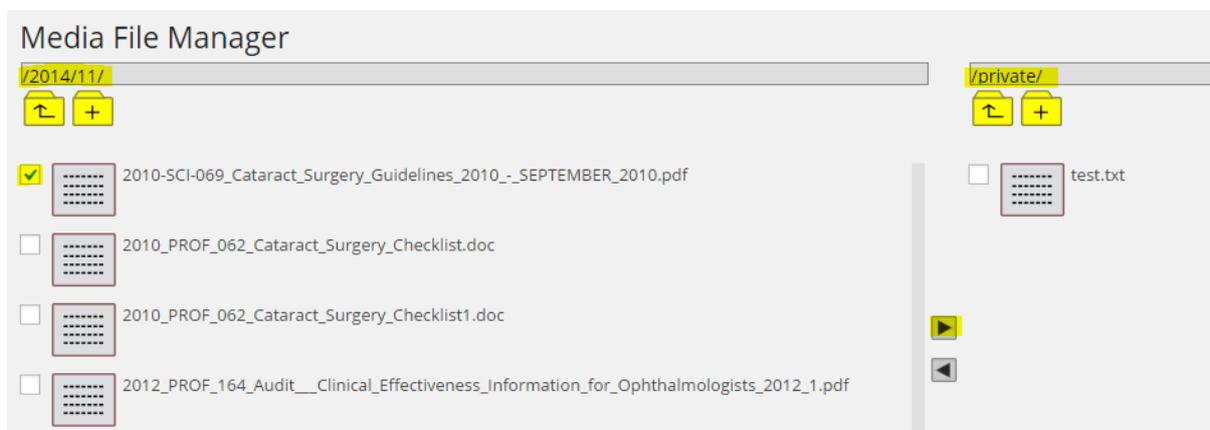


From this screen double click in the left hand pane on folders until you find the file you wish to ensure is member's only. Files are uploaded in date folders in WordPress so if you are unsure what date the file was uploaded you can find this information by searching for it in the main media library and making a mental note of the date.

After locating the file click the tick box next to it and then double click on the 'private' folder on the right pane.

Simply click the right arrow and this will ensure this file is restricted to only members.

e.g.



Publications Section

Introduction

The publications section is a section of the website admin which is used to extend on what is offered by the media library.

Its primary purpose is to add the ability to group multiple documents (pdfs, docs etc) from the media library together in one place from the media library and provide a means to include that group of documents on several pages on the website.

In addition to this this section allows various extra information to be applied to a single document or group of documents which is not provided by the media library such as adding a review date which can be used to notify a member of staff to check a document or group of document.

Publications are also automatically added to the publications part of the website which acts as a searchable document library for visitors.

FAQ: What is the difference between the Publications section and Media section and when should I use it?

The best way to think of the publications section is purely as a supplement to the media library. Every document is saved and categorised in the media library and can be added to pages as detailed previously in this document.

In this way you can upload documents and link to them from pages on the site without ever using the publications section at all should you wish.

Where the publication comes in useful is if you answer yes to any of these questions.

- Do you wish to group and manage documents (pdfs, docs etc) in one place and link them on a page or pages?
- Do you wish to ensure a document is more easily searchable on the site and/or appears in the document library on the site for visitors.
- So you wish to have the same document or group of documents on multiple pages on the site?
- Do you wish to have an ability to track revisions of a document over time and/or record extra information such as an author or extra dates?

If the answer to any of these questions is yes then the publications section of the site can facilitate these goals. **If you simply wish to include a document on a webpage as a single link from the media library you can ignore the publications section entirely.**

If you need further support as to if you should make use of this section please see the supporting document with this guide '**A publication in action.pdf**' which gives a detailed example of where the publication system can be used within the site.

Publications list and Add/Edit access

Much like pages detailed previously in this guide, publications can be located on the left hand menu under 'Publications'. The editing and search process for a publication is exactly the same as for pages the differences are the fields which make up a publication and the fact you can add new ones.

Adding and Editing differences

There are no differences between the adding and editing process for a publication other than to add a new one you simply click the 'Add publication' link instead of clicking on an existing publication, in this case all of the fields will obviously be blank.

Publication Fields

Publication Title

A publication title is used to describe what that publication is E.g. 'A group of documents discussing something'. A title is used in some places on the website, to make this clear you may have a publication with the title 'Fruit Recipes' which may contain documents called 'Bananna Split.doc', 'Fruit salad.pdf' etc...

Publication Information: Dates

Published Date – This corresponds to a date in which this publication was first made available. *This is optional and is only applicable if the documents you add to the publication when grouped together were made available to the public on a specific date.*

Approval Date – This corresponds to the date the publication was approved. *This is optional and is only applicable if the documents you add to the publication when grouped together were approved to be made available to the public on a specific date.*

Review Date – Like with pages, you can set a review date to be emailed in the future to review this publication. *This is optional.*

Publication Information: Summary

This includes Summary and Description. These are used on the website when publications are listed to provide some information about them.

Publication Information: Documents

The main part of the publication this allows you to select an unlimited amount of documents to make up your publication from the media library.

Imagine the publication is the folder on your computer and the documents are the files which are in that folder. You can add as many documents to a publication as you wish.

- You can add a title for the link, if you leave this blank the file name will be used as a link to the document.
- A revision number – This sits alongside the title as a revision if applicable e.g. march 2014 or 2.3 etc, this is optional)
- Attach a review date to each document in the publication. Adding a review date will email the author of the publication and inform them that that specific document should be reviewed, this is optional.
- Apply a cover image (also from the media library) – This can be used as a thumbnail image for the document, this is optional.

From this section you can select to show all revisions / documents which will output all of the documents in your group to the website, if you select no, the website will only show the latest file in the list.

So say we had:

'Fruit Recipes'

'Banana Split.doc'

'Fruit salad.pdf'

If we ticked 'yes' to show all then both of the above files will be outputted on the website. If you select no then only the last file will be used (Fruit salad.pdf).

You can also select to show the revision number on the site should you wish. If you have added a revision number to each document by selecting this it will show on the website link to that document.

e.g.

File	Title	Revision Number	Review Date	Cover
Bananaspli2014.pdf	Banana Split Recipe	March 2014	X	X
Bananaspli2015.pdf	Banana Split Recipe	December 2014	X	X

If you had the publication documents setup as the above and ticked ‘show all revisions/documents’ and ‘Show revision number’ the site would output.

- [Banana Split Recipe – Rev: March 2014](#)
- [Banana Split Recipe – Rev: December 2014](#)

If we ticked yes to ‘show all revisions/documents’ but ticked no to ‘Show revision number’ the site would output.

- [Banana Split Recipe](#)
- [Banana Split Recipe](#)

If we ticked no to ‘show all revisions/documents’ and ticked yes to ‘Show revision number’ the site would output.

- [Banana Split Recipe – Rev: December 2014](#)

In this way the system provides various options to display the documents on the site.

Example documents in a publication.

Files and Revisions

File	Title	Revision Number	Cover Image
 example-pdf Name: example-pdf.pdf Size: 946 kB	meeting minute	march 2014	
 RCOPHTH Website Guide 2014 Name: RCOPHTH-Website-Guide-2014-rev-1-1.pdf Size: 488 kB	attendees	march 2014	
 Eye Journal 2 Name: Eye-Journal-2.jpg Size: 30 kB	outcomes	march 2014	

[Add File](#)

Show all Revisions / Documents
 Display all revisions / documents on the website
 Yes No

Show Revision Number
 Show the revision number in the document link on the website
 Yes No

Publication Information: Other Information

From this tab you can apply a publication author which will display on the front of the website where publications are listed automatically e.g. 'The Royal College of Ophthalmologists' if it was a publication the college created.

Publication Categories

Publications have their own set of categories to support the relevant section on the website, these can be picked to categorise a publication.

Committees

Publications can be part of a committee, at the moment this functionality is currently in development.

Departments & Search Criteria Options

Like pages a publication has options to attach search criteria and belong to a college department, these fields are identical to pages.

Saving a publication

After you have finished adding a publication you can click the blue publish / update button in the top right hand side of the screen.

Applying a publication to a page or pages.

Once a publication has been added you can then apply it to your page by finding your page again in the admin and editing it.

Click into the main editor window where you would like the group of documents to appear and click the 'Add Publication Link' from the toolbar:



The screenshot shows a toolbar with two yellow 'Add Publication Link' buttons. Below the toolbar is a preview of a framed document with a crest and text, titled 'Website of The Royal College of Ophthalmolog'. Below the preview is a paragraph of text: 'This section explains what we do, how we are structured and how to find us. our past and the strategy sub-section sets out what we plan to do in the futur ways in which you can help us.' Below the text is a blue link 'example meeting publication' with a yellow square icon.

This will load a popup where you can locate the publication you just added by typing into the 'filter' box. Click the button next to the publication you would like to add to select it.

You also have the option here to show the cover image for each document in the publication (if you added one) and the option to add some custom text for the hyperlink for this page only, if you leave this blank the website will use the title field you added in the original publication.

Add Publication Link ✕

Please select a publication below using the filter search or select a publication manually. You can also enter a title which will be used as the link text to the publication, if you leave this blank the main publication title listed will be used as the link text.

Title (optional):

Filter:

Show Cover Image:

Select Publication

A letter publication

Ab Publication

Example Publication

Revalidation Resource : Cataract

On clicking 'Select Publication' a special snippet of text will be added to the editor, on saving the page and viewing it you will notice that this snippet is replaced with your group of publications.

example meeting publication

[publication id="1104" img="1"]

support us sub-section describes ways in which you can help us.

example meeting publication



meeting minutes rev: march 2014



attendees rev: march 2014



outcomes rev: march 2014

- [Tags](#) | [College Info](#) | [History](#)

Content tips

Images

- When uploading images please ensure there are no spaces in the image name. This is to try and avoid broken images on the site i.e. example-image-2013.jpg instead of example image 2013.jpg
- Where possible it is better to resize and crop an image before you upload it. WordPress won't factor in what looks nice, just what fits.
- Try to give your images a logical and relevant name. Where possible, try to include the name of the page (where the image is going) i.e. on Planning & Development, you should name the heading image Planning-and-development.jpg. It is more effective for SEO than image1234.jpg.
- Use .jpg and .png formats for images (better quality for the web)

Text

- Do not paste text into WordPress directly from Word (or any other publishing software). The formatting in Word will be carried over into WordPress and will not translate appropriately (causing formatting problems). Use the paste as plain text button , this will strip everything out

- If you do paste straight from Word, you can use the rubber tool to remove all formatting.
- Where possible, try and create internal links to different parts of the site
- Use Headings two and three to create sections on each page

References

Formatting

You have the following formatting tools available on pages:



- Add Media = add images / pdfs directly into content
- Visual = amend content with editor
- Text = plain HTML
- **B** = Bold
- *I* = Italic
- ~~ABC~~ = strike through text
-  bullet point
-  numbering
-  = insert block quote
-    left align, centre align, right align
-   link / unlink
-   insert more tag, insert page break
-  distraction free writing
-  remove kitchen sink (bottom layer of options)
- Paragraph = change text layout
- U = underline
-  = full align
-  = change colour text
-  = paste as plain text
-  = paste from word
-  = remove formatting
-  = insert custom character
-  outdent
-  indent
-   = undo, redo
-  = help