



How To

Update and modify Carewest's websites
using WordPress

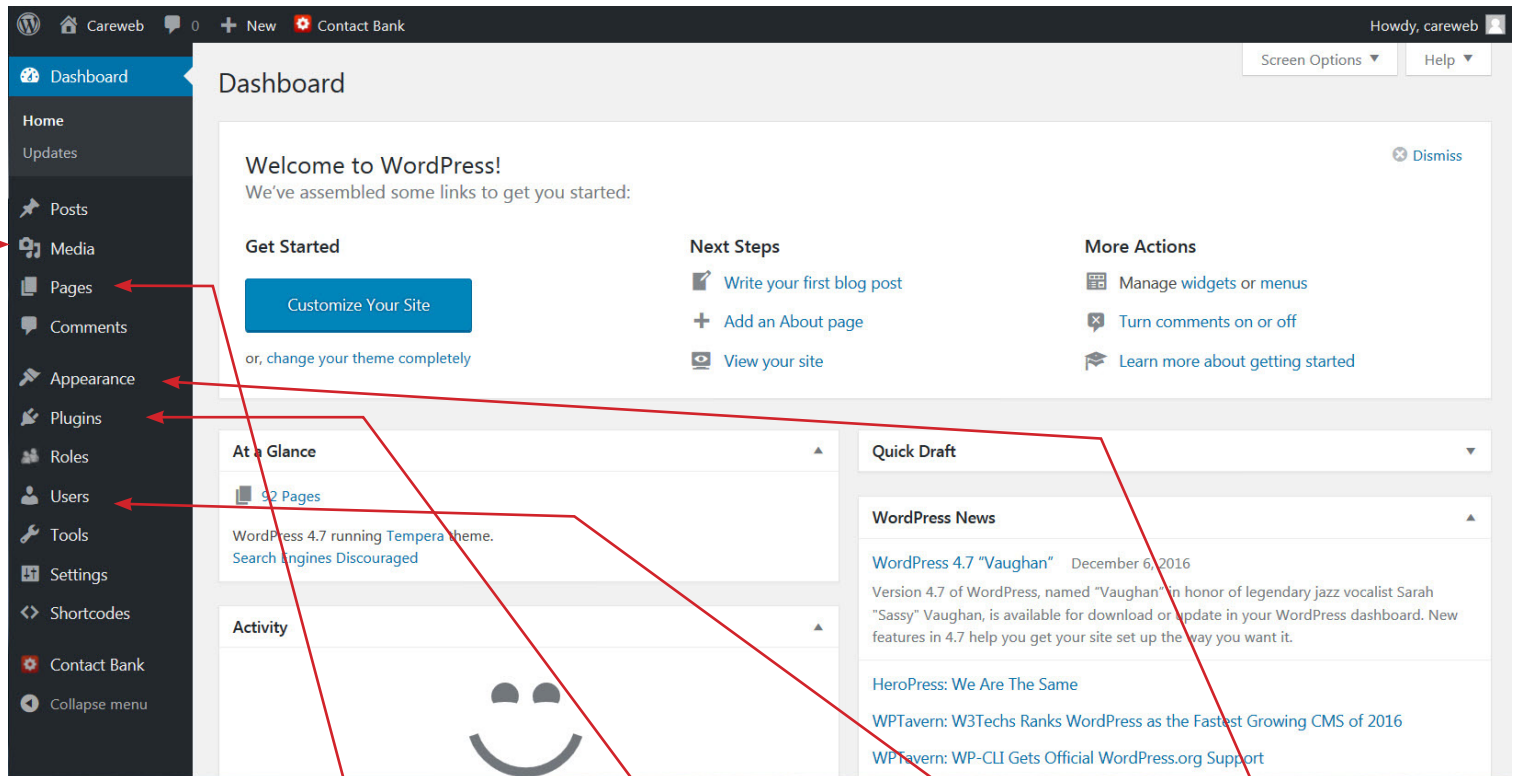
Internal website at www.carewestintranet.ca

External website at www.carewest.ca

Wordpress Administration Dashboard

To modify one of the websites, sign on to the Wordpress Administration Dashboard for that particular website, using the password information on the previous page.

Once you sign on, you'll see a screen that looks like this. This is the Wordpress Administration Dashboard.



Media

The media library is the library of images and PDF documents that you will upload into the system. Any image displayed on a page or any document linked to from a page goes in the Media library first.

Pages

Every separate page in the website is listed in the Pages library. From here, you can edit any page on the site, create new pages or delete pages.

Plugins

Plugins are the bits of software added to the website to increase its functionality. For example, there is a Shortcodes plugin that allows you to quickly create buttons, image galleries or expandable lists.

Users

You'll access this area mostly for Careweb, when new User accounts need to be created (as new staff are hired) or deleted (as staff leave the organization).

Appearance

This is an important area. Under the Appearance tab, you can edit the websites drop-down menus, the site's widgets, and edit the Theme settings (the Theme is the template in which your website is

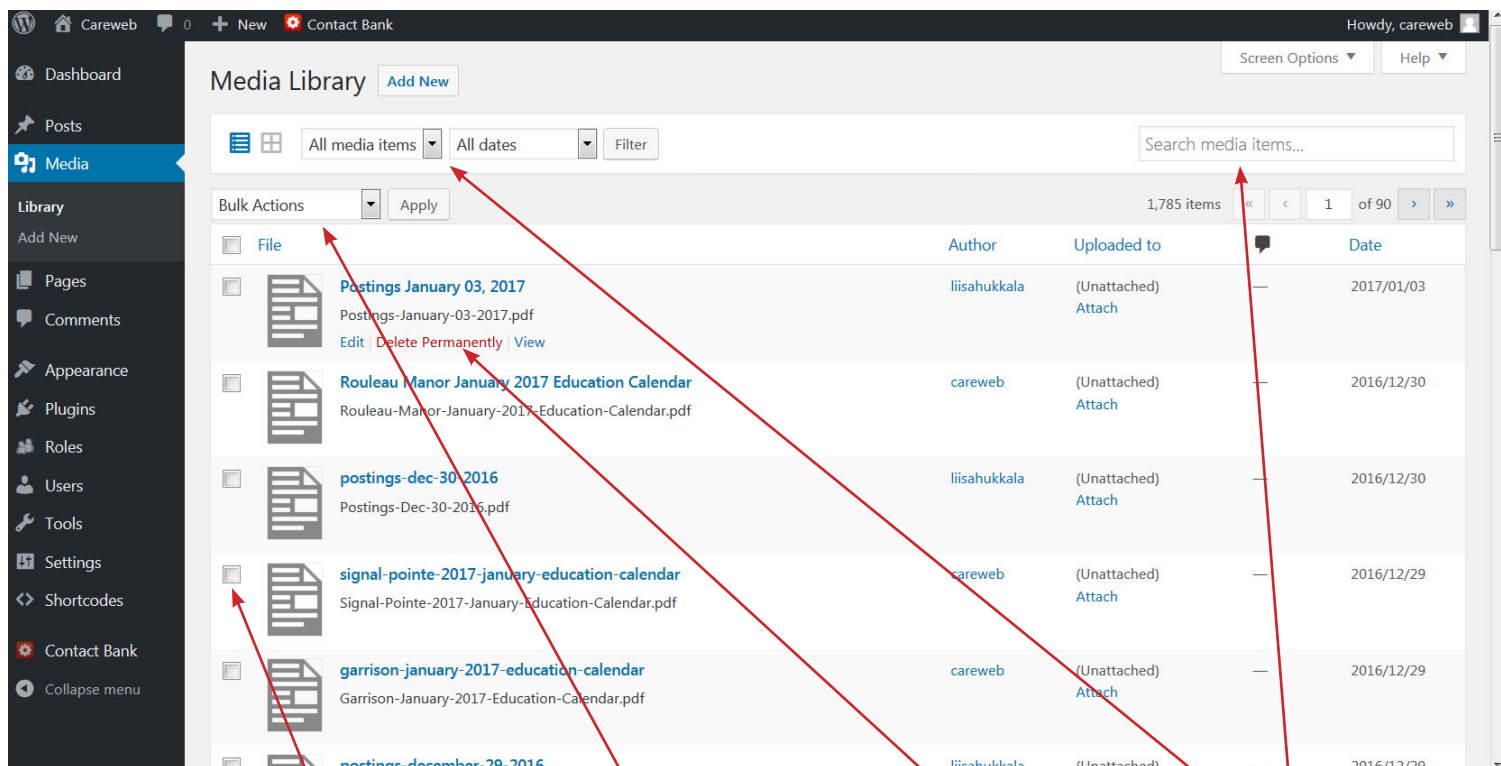
These are the areas in the Dashboard which you will likely access the most.

Media

If you hover your cursor over “Media” in the Dashboard, you’ll be given two options:

- Library
- Add New

Media - Library



Library

The media library is the library of images and PDF documents that you will upload into the system. All media are displayed in chronological order but can be searched or filtered so you can find what you’re looking for.

Select

You can check one or multiple library items if you want to apply actions to them. You can delete items, edit items or view items.

Bulk Actions

Use this feature if you want to delete multiple media at the same time. Recently, I cleaned out outdated policies, by doing a search for all policies done before we updated them, selecting all of them and Bulk Deleting them. Don’t forget to hit the Apply button!

Hover Actions

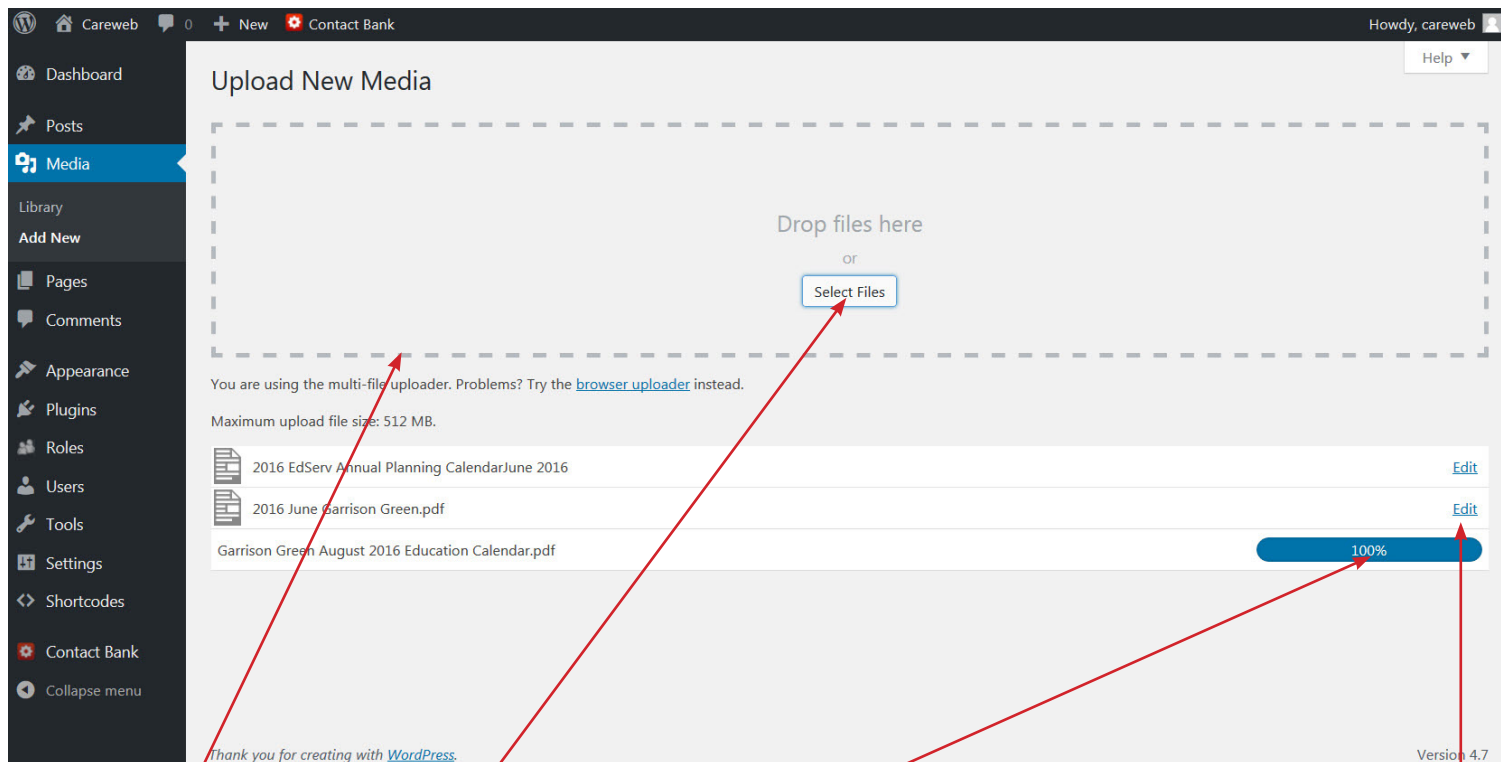
Cover your cursor over one media item name to reveal a set of actions underneath it. You can Edit, Delete Permanently or View the media item, whether it be an image or PDF document.

Search/Filter

Search the library for something specific or filter by name, date, author. This allows you to find something more quickly.

Media

Media - Add New



Drag and Drop

Loading files from your computer into the Media Library is easy! Simply drag them from your computer's filing system and drop them into the area defined by the dotted line. You can drop multiple files at once into the drop area.

Browse Files

Or, you can load files by pressing the Select Files button and browsing your computer's filing system. You can select multiple files at once to upload to Wordpress.

Loading Time

Often, files load up quickly - especially if they are small sizes. But larger files may take some time. See the loading status of each file here. Once it says "Edit", that means your file is successfully loaded and you can now proceed to edit, if needed.

Files too big?

Occasionally, an error may occur if you're trying to upload a large file. Try in a different browser (Google Chrome seems to work well for large files or Mozilla Firefox). Or, try reducing the file size and trying again.

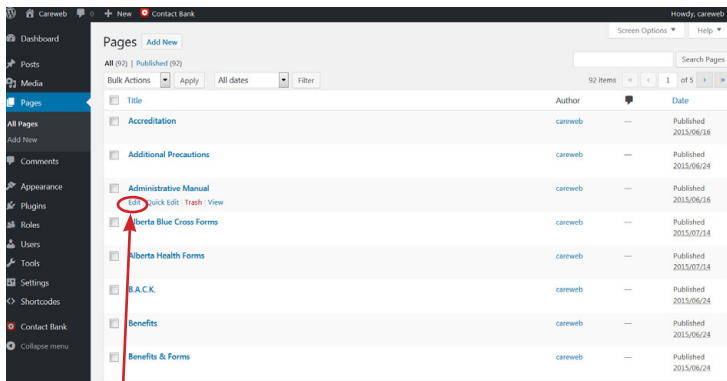
Edit files

Click on the Edit link to edit the files after uploading. The Editing area is important, as you'll need information from here to link files to a page in your website. Each file is assigned it's own address, called the File URL. It's this address you'll need and you'll find it in the Editing area.

Editing Pages

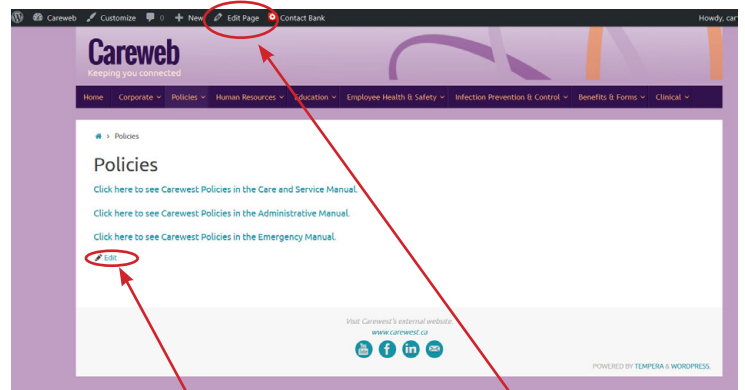
You can edit pages two ways

- Through the Pages section in the Wordpress Administration Dashboard (see Pg. 3)
- By clicking the “Edit” or “Edit Page” links at the top and bottom of each page



Through the Pages Section

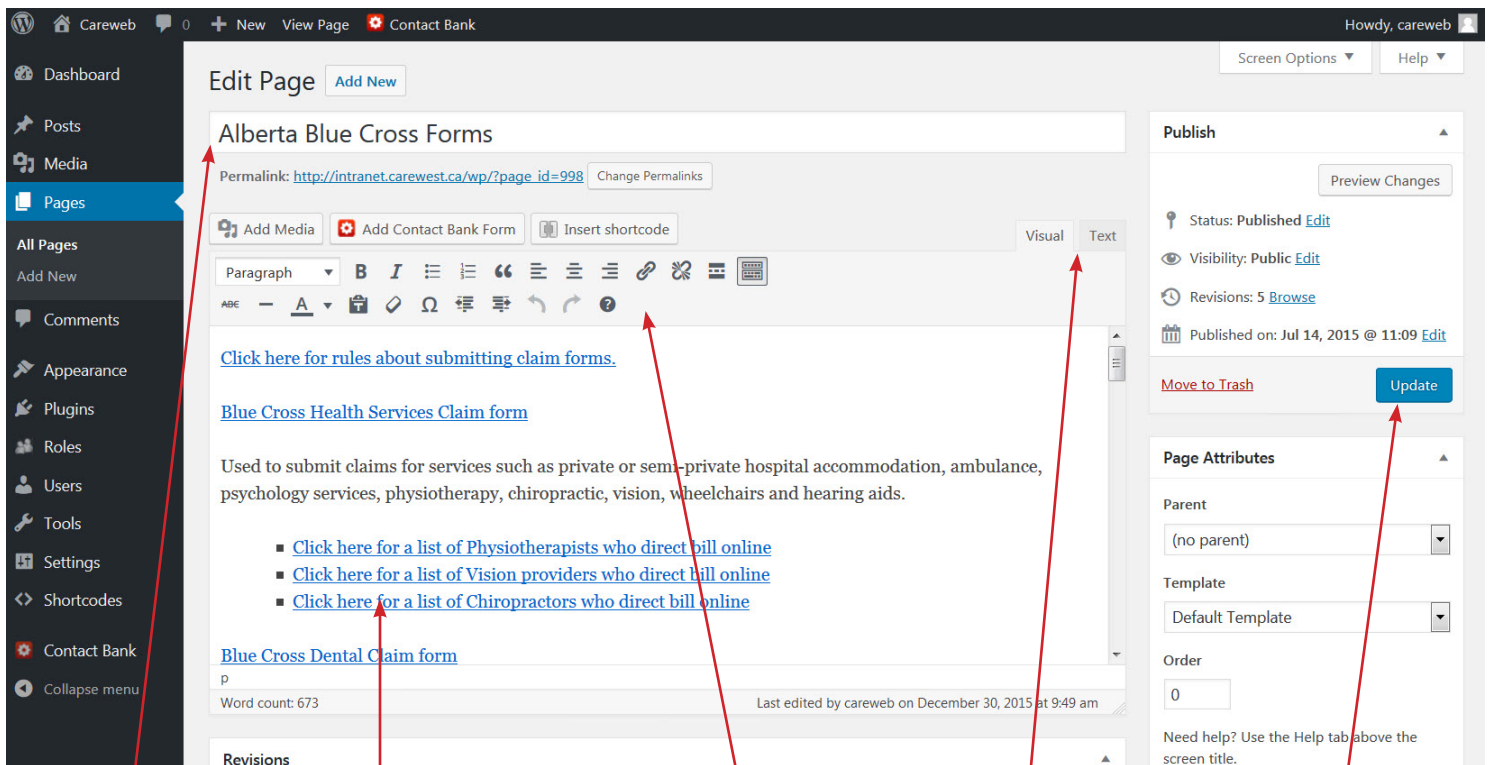
Hover your cursor over the name of the page you want to edit and select Edit.



On the page itself

Click on the Edit (bottom of page) or Edit Page (top) to edit content on a page.

The Page Editor Screen



Page Name

The name of the page is displayed here. The name can be changed at any time.

Page Content

The editable page content is displayed in this area. You can type directly in this area.

Toolbar

Modify the text using the tool bar to bold, italicize, underline change font colour and style, make bullet lists or link text.

Visual vs. text

You can switch between how you want to view the page content while editing. The text tab displays all the code.

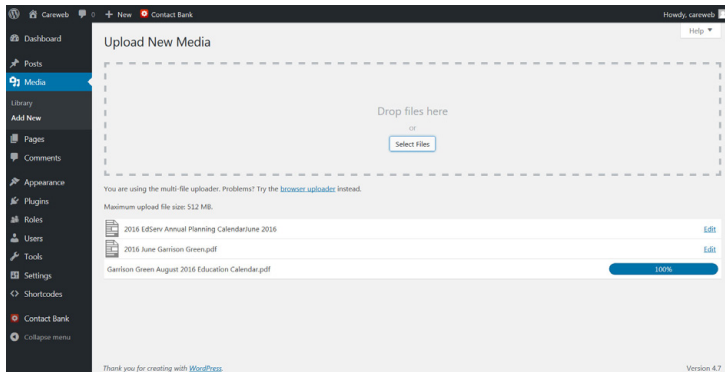
Update button

Don't forget to save your changes when you're done editing by clicking the Update button.

Linking Text

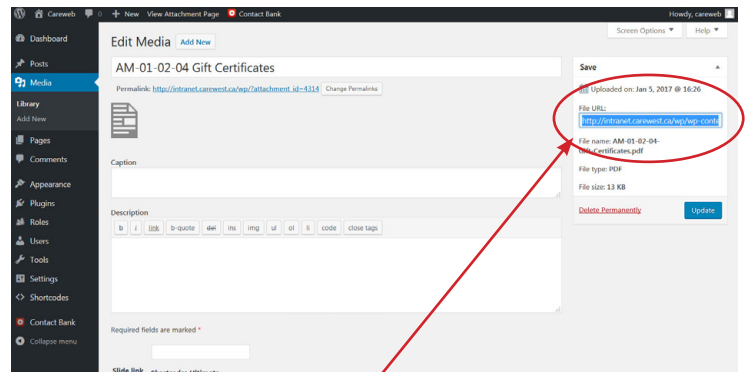
There are three steps to linking text on your page to documents (like policies) or images (like Frame of Reference)

- The document or image must be uploaded into the Wordpress database through using Add New Media (pg. 5)
- Copy that document's File URL in the Media Editor
- Link the text on your webpage to that File URL using the Link button



Step 1 - Add New Media

Refer to the instructions on Pg. 5 to Add New Media into the Wordpress database

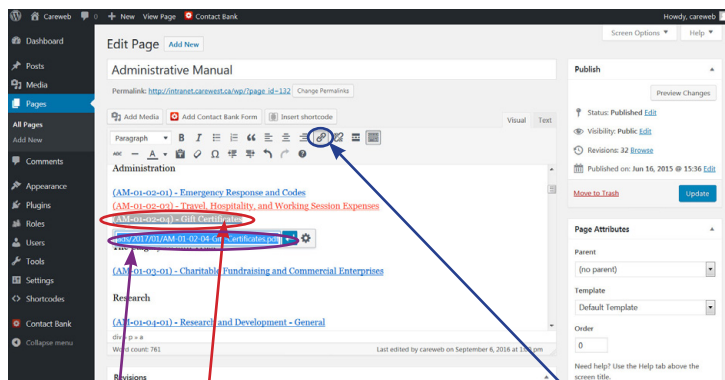


Step 2 - Copy the File URL

Wordpress assigns all documents/images a File URL - copy it. You will need to paste it in Step 3

Proceed to Step 4 if you are linking to documents or images.

Don't proceed to Step 4 if you are linking to other pages within the website.



Step 3 - Link Text

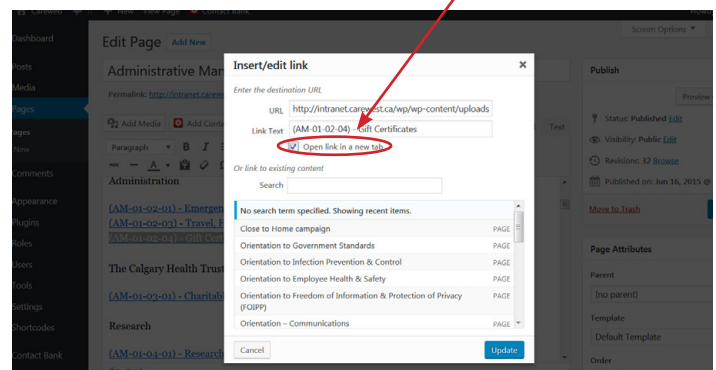
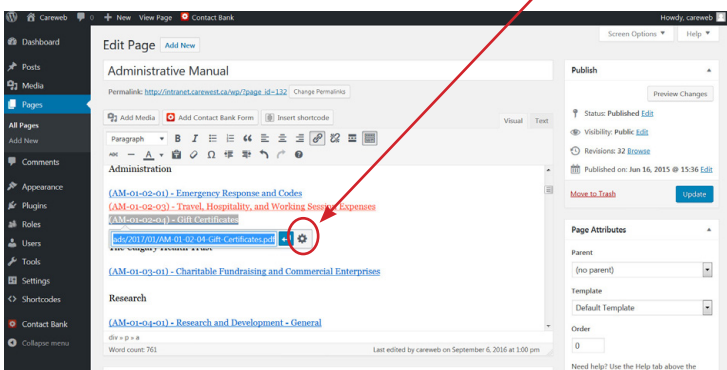
1. Highlight the text you want to link
2. Click on the Link button

3. Paste the File URL you just copied into the Link dialogue box that appears after you click the Link button.

Step 4 - Open in New Tab

Tell Wordpress to open the link in a new tab when people click on it by clicking on the Link Options button.

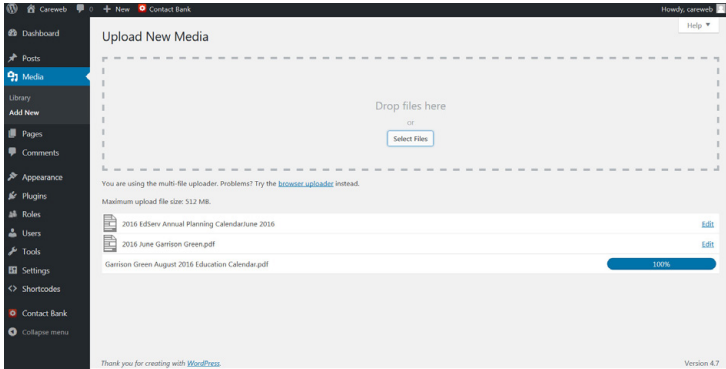
Check the "Open Link in a new tab" box and then click on the Update button.



Adding Images to Pages

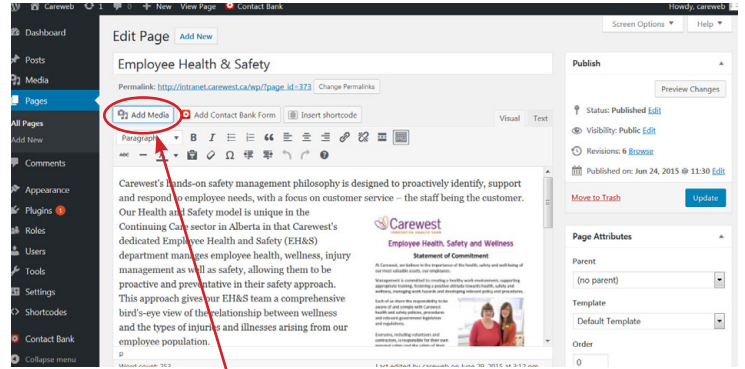
Add images to pages to increase visual appeal.

- Step 1: Add your images to the Wordpress Media Library (see Pg. 5)
- Step 2-3: Add them to your page.
- Step 4: Edit the image on the page.



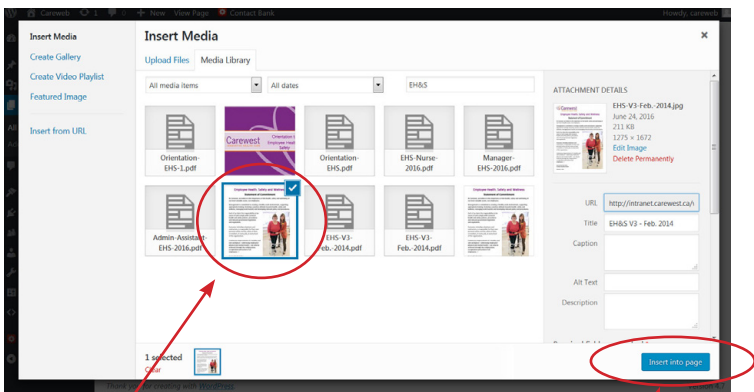
Step 1 - Add New Media

Refer to the instructions on Pg. 5 to Add New Media into the Wordpress database



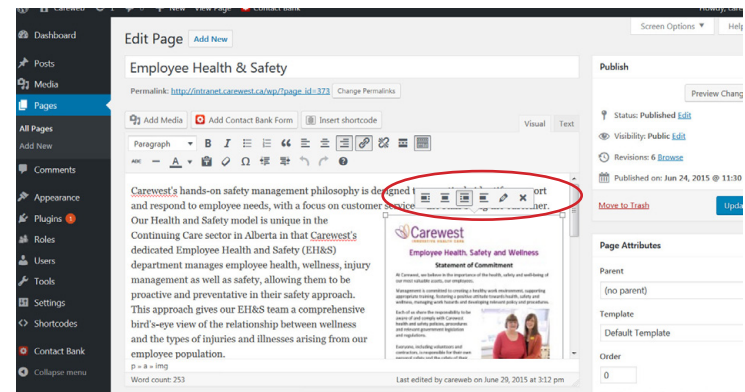
Step 2 - Add the images to your page

Click on the Add Media button. That will open your Media Library, which you can browse.



Step 3 - Browse the Media Library

Select your image and click on the "Insert onto page" button.

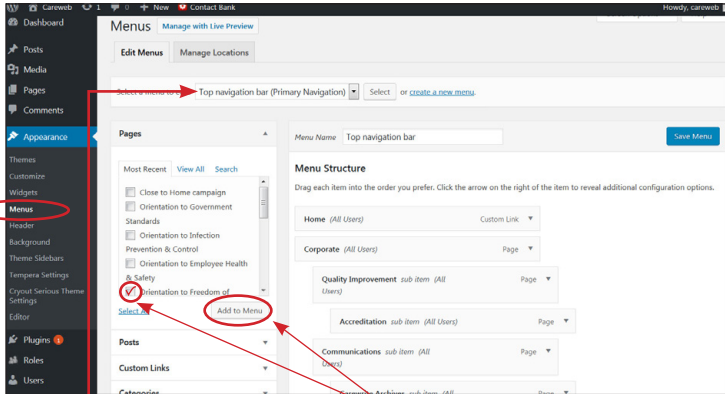


Step 4 - Edit the image

Once you place the image, a small toolbar pops up, which allows you to left-, right- or centre-justify it or make changes to it.

Menu Structure

You can have multiple menus on your website but the most important one is the Primary Navigation Menu (which are represented by all the tabs at the top of every page of the website that allow users to see drop-down menus of all the pages on the site). This menu can be managed in the Wordpress Administration Dashboard --> Appearance tab --> Menus.

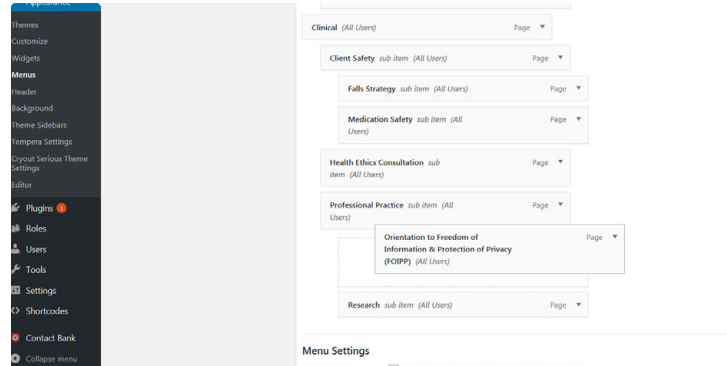


Select the menu you want to edit

You may have multiple menus available to edit. Select the one you want. The primary navigation menu is the top bar with all the tabs on the website.

Add pages to the Menu Structure

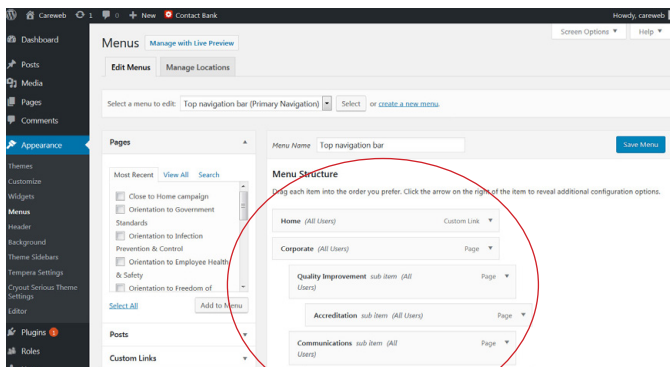
Select the pages you want to add to the menu and click on "Add to Menu". They will appear at the bottom of the Menu Structure pane.



Click-and-drag to reorder your menu

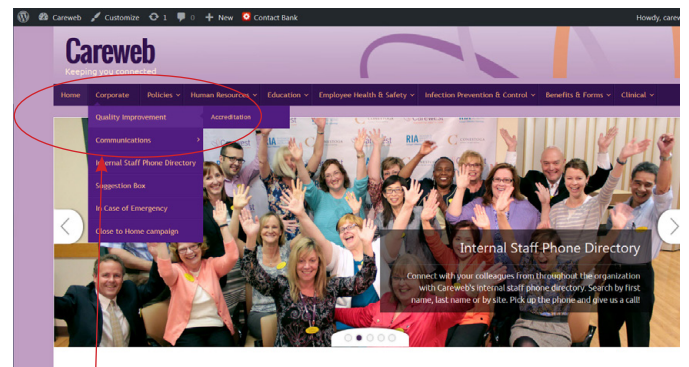
Navigate to the bottom of the Menu Structure to find the item you just added. Click on it and drag it to where you want it. Items flushed to the left represent new tabs in the primary navigation bar. The items underneath it and slightly indented to the right represent a sub-menu item. Items underneath sub-menu items and slightly indented to the right even more represent a sub-sub-menu item.

For Example...



THIS...

equals



THIS.

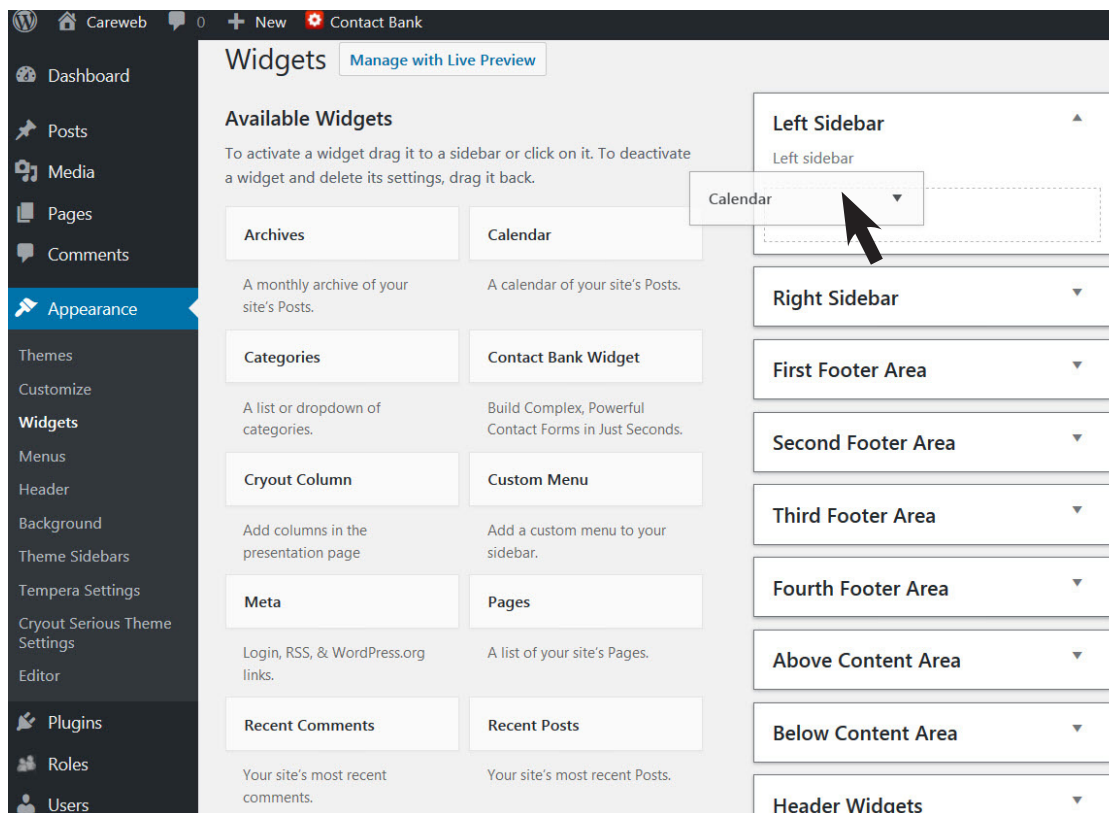
Widgets

Widgets are the elements on a page that you often see in the sidebars or headers/footers of the page that often don't change as you flip from page to page. They are usually tables of contents, menus, links or images that frame the main content of page and you'll see them repeated on different pages of the same website. On our websites, our footer widgets don't change but our right-sidebar widgets do change from page to page. Because widgets aren't really supposed to change from page to page, we had to download a special plug-in to help us create custom widgets for each page. The Plug-in is called Easy Custom Sidebars.

This section will show you how to create or modify our widgets and then, how to use Easy Custom Sidebars to create a custom widget.

Appearance --> Widgets

Navigate to the Widgets area from the Appearance section of the Wordpress Administrator Dashboard. From here you can click-and-drag from a selection of pre-defined widgets, into the area you want that widget to sit display on your page. As you can see, from the example below, a Calendar widget is being dragged into the left sidebar. Once that change is saved, a calendar will appear on every page of the website, in the left sidebar.



NOTE: Some of the preset widgets available for your use include: a Calendar, a list of your site pages, a site search engine, custom menus and more.

But what if you want a different widget on every page?

If you want a custom widget on every page, you need to create those custom areas for the widget to sit. Once you do that, you can click-and-drag the widget into the new custom area. Both our websites have custom widget areas on almost all of their pages.

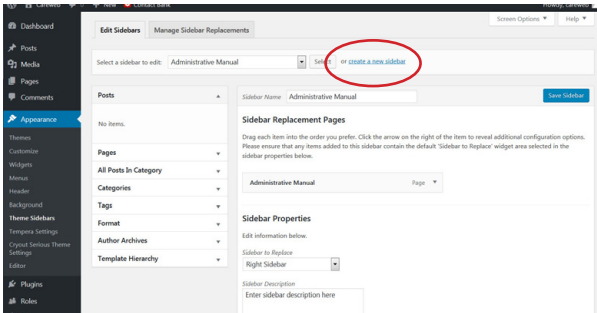
You create these custom widget areas using the plug-in Easy Custom Sidebars.

Easy Custom Sidebars

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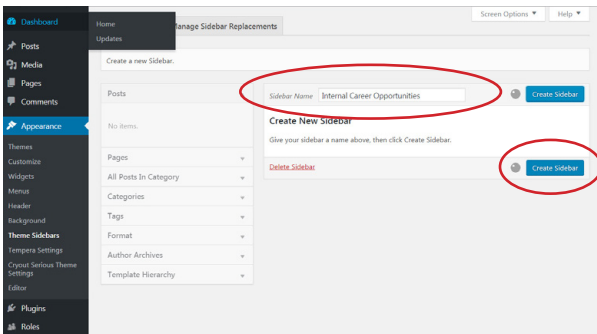
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Create New Sidebar

Navigate to the Easy Custom Sidebar's plug-in from the Appearance section of the Wordpress Administrator Dashboard. Once you are there, click on the link that says Create New Sidebar.



Name your sidebar

Give your sidebar a name and then hit the blue button Create Sidebar.



Sidebar Options

Add your sidebar to your desired page and desired area on that page.

