A guide to Edina Morningside's website administration.

Website user guide

For Edina Morningside Community Church

2.19.2017

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WEBSITE USER GUIDE

LOGGING IN TO THE ADMIN DASHBOARD

1. Click the "Login" button at the top right, or go to the login panel at http:emcucc.org/admin/
2. Enter your username and password.
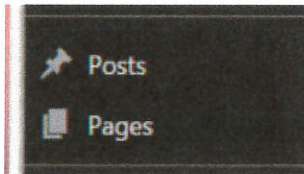
DASHBOARD OVERVIEW

The WordPress admin backend consists of a left navigation menu containing links to the different kinds of content, and a main area on the right where you work on website content.

EDITING A PAGE

Once you are logged in, there are two ways to open a page for editing.

Method #1: From the admin dashboard

1. Click the "Pages" link in the left menu.
2. Click on the name of the page you want to edit.
3. For details on editing a page, see "Creating a Page" below.

Method #2: From the public front end

1. Navigate to the page you want to edit
2. Click "Edit page" in the black bar at the top of the page.
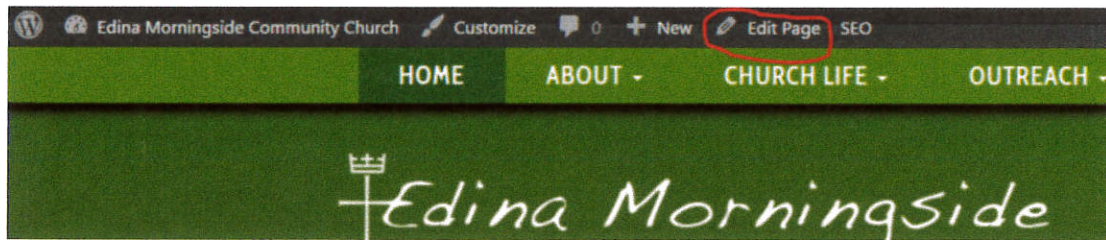
CREATING A PAGE

1. Click the "Pages" link in the left menu.
2. Click the "Add new" button at the top of the panel.

PAGE TITLE

This is the name of the page, and will appear as the page headline and in the nav menus. You can pick a different name in the nav menu by editing the menu item (See "Adding page to navigation menu" below).

PAGE ATTRIBUTES

Attributes tell the site where the page fits into the site structure, as well as what display template to use.

1. In the "Page Attributes" section of the panel, Do the following:
   a. **Choose parent.** This tells the site what section the page belongs in. It affects where the page is displayed in the Pages index and in the sitemap in the footer. **NOTE:** Make sure any new page has a parent. Otherwise you will break the sitemap.
   b. **Choose template.** This tells the site what template to use when displaying the page content. Any pages you create should only need the default template.

PAGE CONTENT

1. Make sure the "Visual" tab in the top right of the content box is selected. This will give you access to all the styling buttons.

1. **Insert image/audio/video.** Choose a media file to insert.
2. **Visual view/HTML view.** Switch between the WYSIWYG editor and the raw HTML editor.

Paragraph-level controls

3. **Paragraph dropdown.** A list of paragraph-level styles you can apply to text.
4. **Blockquote.** Use when quoting other sources of information.
5. **Unordered list.** Creates a list of bullet points.
6. **Ordered list.** Creates a numbered list.
7. **Horizontal rule.** Place a horizontal line to separate content.
8. **Insert table.**
9. **Paste as text.** Use when pasting content from another application. it strips out all formatting, giving you unstyled text to work with.
10. **Alignment/Justification.**
11. **Full screen.** Displays the post/page editor in full-screen mode

Word-level controls

12. **Formats.** Most of the styling options in the toolbars, in a dropdown list.
13. **Bold/italic/strikethrough/underline.** Applies/unapplies the given style to selected text.
14. **Superscript/subscript.** Moves text above or below the baseline.
15. **Add/remove link.** If text is highlighted, it converts the highlighted text to a link. If not, it inserts a link at current insertion point. Remove link undoes all of that.
16. **Undo/redo.** Lets you step backward and forward through your changes.
17. **Delete formatting.** Removes all styles from selected text.
18. **Special characters.** Displays all the available characters of the current font.
19. **Help**

CONTENT SECTIONS

Content on the website is stacked vertically in a series of stripes – white stripes alternate with green stripes. Each different kind of content should have its own stripe. So the main text/photos on the page will be in one stripe; a calendar of related events would have its own stripe. A list of related news items would have its own stripe. And so on.

To indicate stripes, you use the **[emc-content]** shortcode.

1. To indicate the start of a stripe, type in **[emc-content]**
2. To indicate the end of a stripe, type in **[/emc-content]**
3. Put your content in between those two tags.
4. The backgrounds will automatically alternate between white and green.

So the contents of your page editor may look like this:

> **[emc-content]**
>
> > **Content for first stripe**
>
> **[/emc-content]**
>
> **[emc-content]**
>
> > **Content for second stripe**
>
> **[/emc-content]**

SHALLOW CONTENT

On some pages where you're listing a bunch of short items (such as the "Morningside U" page), you may want stripes that don't have quite as much padding. To get them, use **[emc-content-shallow]** instead of [emc-content].

EDIT AND STYLE TEXT

1. Type or paste your text into the content editor.
2. **Paragraph styles.** You can set paragraph-level styles (like "paragraph" or "Header 2") by placing your cursor in a paragraph (or selecting multiple paragraphs) and choosing the appropriate style from the "Paragraph" dropdown.
   a. **Paragraph.** Standard paragraph. Includes spacing between paragraphs, so no need to manually put in blank lines.
   b. **Blockquote.** Use when quoting a paragraph or more of material from other sources, or when you want to use a quote as a visual element.
   c. **Header 2.** Used for content sections that require labels, like "EVENTS" or "NEWS". As a rule, you shouldn't use this in regular content.
   d. **Header 3.** Standard subhead. Use this the most.
   e. **Header 4.** Smaller subhead, used as a heading for sub-sub-sections.
   f. **Header 5.** Used for sub-sub-sub-sections.
   g. **Header 6.** Used for sub-sub-sub-sub-sections. You should almost never use this header.
3. **Inline styles.** Once you've set the paragraph-level style, you can further customize text by applying a Style from the "Formats" dropdown. It can be applied to an entire paragraph or just selected text within a paragraph.
4. **Create buttons.** To turn a link into a button:
   a. **Write the text of the button.** This is the text that users will see.
   b. **Highlight the text.**
   c. **In the "formats" dropdown, choose "Objects -> Orange Button".** The text should turn into an orange button.
   d. **Highlight the text again, if necessary.**
   e. **Click the "Link" icon.** This brings up a field where you can type/paste the link URL.
      i. **Additional options:** If you want more options, click the gear icon in the popup and you'll get the full set of link options. In particular, this lets you do two things:
         1. **Set the link to open in a new tab**
         2. **Link to a page, rather than entering a URL.** That way, if the URL ever changes, the link will still work.

INSERT MEDIA

1. Place the cursor where you want to insert the image. If you're not wrapping text around it, make sure it's on its own line.
2. Click the "Add Media" button (#1).
   a. **To insert an existing image:**
      i. Choose the "Media Library" tab. Find the image you want, and click its "Show" link.
   b. **To upload a new image:**
      i. Choose the "Upload Files" tab
      ii. Drag and drop images on to the page, or click "Select Files" to browse to the image(s) you want to upload.
3. Edit the photo information using the right-side panel.
   a. **"Caption"** is the text that visitors will see. It should include the basic information about the photo: When and where it was taken, who is in it, what is happening, etc.
   b. **"Alt Text"** is a brief (one phrase or sentence) description of the image, used by Google for page-ranking purposes. The more photos that have Alt text, the better the site ranks in Google searches.
   c. **Categories:** This is very important. If you do nothing else, choose at least one category for the image. Categories is how images get displayed around the website, and also make it easier to find images in the Media Library.
   d. **Attachment display settings:** This affects how the photo will be displayed in the page/post you're currently editing. If all you're doing is uploading a photo so you have it available, you can ignore this section.
      i. **Alignment:** whether the photo will be to one side of the text, or centered above it. By default it is left-aligned: This isn't always what you want.
      ii. **Link to:** Decide if the photo will link to something.
         1. **Media file:** Full-size version of the photo
         2. **Attachment page:** A page containing information about the photo
         3. **Custom URL:** Can link to anything you want
         4. **None.** No link.
      iii. **Size.** Choose from several predefined photo sizes:
         1. **Thumbnail (150px square):** Good for mugshots or other small pictures that you're using "left align" or "right align" on.
         2. **Medium (300px wide).**
         3. **Large (1024px wide).** The width of a standard laptop monitor. You should rarely need an image larger than this.
         4. **Actual size.** Use this if you've sized the image to be a specific size.
4. Click "Insert into Page/Post." This inserts the picture, as well as saving the image and any information to the media library.
5. You can now see the photo in the content editor.

EDIT/DELETE IMAGES

1. In the Page Editor, click on the image
2. Two icons will appear: edit and delete.
3. Click the appropriate icon.
4. The edit box that appears contains slightly different options than you get when first inserting an image, but they should be fairly self-explanatory.

ADDING A PAGE TO THE NAVIGATION MENU

After creating a page, you'll probably want to add it to the navigation menu so users can find it.
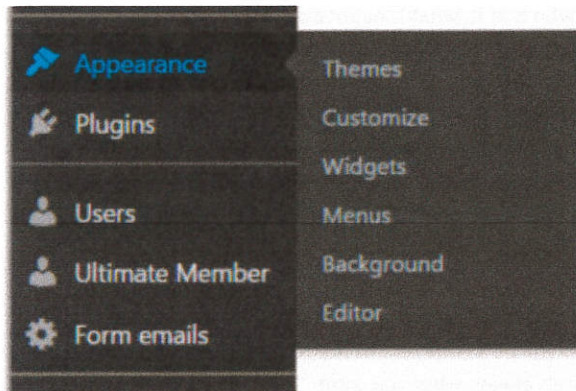
1. Hover over the "Appearance" link in the left menu and choose "Menus".
2. In the "Pages" box, select the new page and click "Add to Menu."
3. In the right-hand box, drag the new page to the proper place in the menu. Submenus are indented under their parent menu.
4. By default, the menu text will be the same as the page title. If you want the menu text to be something different, click the down arrow on the menu item and put your preferred text in the "Navigation label" box.
5. Click "Save menu" (either upper right or bottom right).

MANAGING POSTS (NEWS ITEMS)

Editing posts is just like editing pages, except you don't apply templates or add them to the navigation menu.
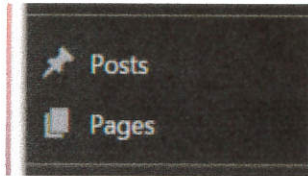
1. Click on the "Posts" link in the left menu. This will bring up a list of posts, much like clicking on "Pages" brings up a list of pages.
2. Edit the post just as you would a page.
3. **Featured image:** You can add a "Featured Image" to a post by clicking "Add featured image" in the box in the lower right of the "Edit Post" screen. If you add an image, then that image will appear with the post in news areas around the site.


PUBLISH A POST TO FACEBOOK

You can choose to auto-publish a post to Facebook:

1. Assign the category "Facebook" to the post
2. If you want an image to appear on Facebook, set it as the Featured Image for the post.
3. Click "Publish" or "Update".
    a. Every time you Publish or Update a Facebook post, it creates a new Facebook post (So if I Publish a post and then update it, it will appear twice on the Facebook timeline). If this happens, go to Facebook and delete the older post.

HOME PAGE SLIDESHOW

The home-page slideshow is managed through a list of slides. You can insert the slideshow on any page using a shortcode, and control what the slideshow displays by adding attributes to the shortcode. The slideshow shortcode is discussed in detail in the "Shortcode Reference" section.
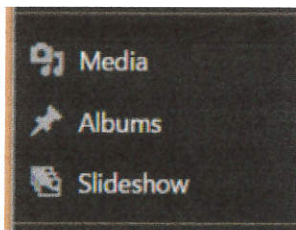
To manage slides:

1. Click on the "Slideshow" link in the left menu.
2. Click "Add new" to add a new slide, or click on the slide name to edit a slide
3. Give the slide a title. This is only used for identifying the slide in the admin section.
4. Give the slide an excerpt describing it. In some situations, this could be displayed as a caption in the slideshow.
5. In the "Featured image" section, choose the image you want to use for the slide.
    a. The image should be 2000 pixels by 694 pixels
6. Click "Publish" or "Update" in the upper right.
7. To place the slideshow on a page, use the **[image-carousel]** shortcode.

HOME PAGE SPECIAL ANNOUNCEMENTS (SNIPPETS)

This is a special announcement that appears above the slideshow on the home page. It is only used for unusual and important things, like the annual meeting, or a new pastor, or some other important event or news.
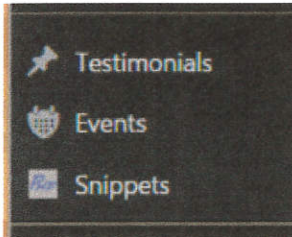
To manage the announcement:

1. Click on the "Snippets" link in the left navigation
2. Hover over the title of the "Top of home page special content" snippet and click "Edit"
3. Edit snippet content. It's raw HTML, so don't change any tags unless you know what you're doing. Just edit the headline and body text.
4. Click "Save Code Snippet"
5. Click "Close" at top of page

To make the announcement visible, edit the home page (see "editing pages" for instructions) and change **[emc snippet=0]** to **[emc snippet=1]**.

Be sure to change it back to "0" or "none" when the announcement no longer needs to appear.

PAGE-TOP VIDEO

1. Inserted with shortcode **[evp_embed_video url="url-of-uploaded-video" poster="url-of-uploaded-screenshot" ratio="0.417" class="play-button no-hover fixed-controls" preload="auto"]**
2. This will insert the video at the top of any page it is added to.
3. If it is added to the home page, it will appear below any special announcement, and will hide the regular slideshow.
4. **UPLOAD VIDEO:**
    a. Upload video to the media library.
        i. Click "Media" in the left menu.
        ii. Click "Add New" at the top of the page
        iii. Follow instructions for uploading files.
    b. Edit the video and copy the "File URL" from the upper right corner of the page.
    c. Paste this URL in place of "url-of-uploaded-video" in the shortcode.
5. **UPLOAD SCREENSHOT:**
    a. Take a screenshot of the video frame that you would like to use as a thumbnail.
    b. Save the screenshot as a jpg, and upload it to the media library
    c. Edit the screenshot and copy the "File URL" from the upper-right corner of the page.
    d. Paste this URL in place of "url-of-uploaded-screenshot" in the shortcode.
6. **SET ASPECT RATIO:**
    a. Measure the height/width of the video
    b. Divide the height by the width
    c. Enter the result in place of "0.417".

MANAGING PHOTOS

See "inserting image" for instructions on adding photos and photo-related information.

You can optionally add photos to albums (below).

PHOTO ALBUMS

Albums are how the site organizes photos into groups other than categories. An album could be an event ("Pancake Breakfast") or a type of picture ("Pastors" or "Building exteriors"). You first create an album, then you add a gallery of photos to it.

Albums are automatically added to the "Photos" page. You can also use the **"emc-photo-albums"** shortcode to add albums to other pages.

1. Click on "Albums" link in the left menu.
2. Click "Add New"
   a. Enter Title of album
   b. Assign relevant categories
3. Add Photos to album
   a. Click "Add Media"
   b. Click "Create Gallery"
   c. Upload files or add from Media Library
   d. **Caption:** a title for the photo. Should be short.
   e. **Description:** A full description of the photo – people, places, activities, date, day of week, etc.
   f. Click "Create a new gallery"
   g. Click "Insert gallery"
4. Add album cover
   a. In lower right, click "Set featured image"
   b. Choose one of the images from the gallery to use as the album cover
5. Click "Publish" or "Update"
6. **To edit an existing Album:**
   a. Open the album
   b. Click on one of the photos.
   c. A palette will appear. Click the pencil to edit the gallery, or the "x" to delete it.
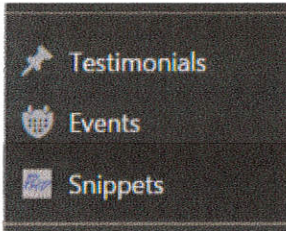
"Events" is what the website calls calendar items. Adding an event to the website will make it appear in the main church calendar as well as on pages throughout the site.

You can enable online registration for events, letting the website automatically keep track of who has registered and how many seats are still available, and when to open/close registration.

To manage events, click on the "Events" link in the left menu. Then choose one of the following options from the submenu.

Edit an existing event
Click on the event name in the event list.

Add a single event
1. Click "Add Event".
2. Enter date, time, title, description
3. Set booking options, if desired (see below)
4. Provide the location. If you need to add a location, see "Locations" below.
5. Associate with at least one category. The category determines what pages the event will appear on. Events with the "Edina Morningside U" category, for instance, will appear on the Morningside U page.

Recurring events
Adding a recurring event is the same as adding a single event, except you define a recurrence pattern (daily, weekly, etc.).

1. Click "Recurring Events" to add or edit a recurring event.

Locations
You can define locations, then assign events to those locations. People viewing the event will see the address, and also a Google Maps marker. To add/edit a location:

1. Click "Locations"
2. Click "Add location" or click on the title of an existing location
3. Give the location a title and (optionally) a description.
4. Enter the address.
5. Click "Publish" or "Update".

BOOKING OPTIONS

With bookings, you can activate online signups for an event.

1. **In the description of the event:**
   a. Include a line listing instructors or event leaders.
   b. Include a line describing any special requirements or limitations, if needed
   c. Do NOT include any information about class size.
   d. Make sure there is NOT a blank line at the end of the description.
2. **In the "Bookings" section of the event:**
   a. Check the box that says "Enable registration for this event".
   b. Edit the "Reserve a spot" ticket
   c. Set the price, if there is one; otherwise leave it at "0.00"
   d. Set the number of spaces; the default is 30, since we seem to use that number a lot. If there's no space limitation, just set an arbitrarily high number – like 100 or 200.
   e. That's it. All the other booking fields can be ignored.

MANAGING BOOKINGS

When people reserve a spot in an event with bookings enabled, the event creator (emcucc@emcucc.org , in most cases) will receive a notification.

You can view/edit bookings in the Bookings section of the Events menu.

1. Click on "Events" in the left menu.
2. Click on "Bookings".
   a. At the top is a list of all recent bookings.
   b. Below that is a list of events with bookings. Clicking on an event will show you all bookings for that event only.

When all the spots are full, additional people can choose to go on a waiting list. The event organizer can decide whether to increase the number of available spaces at the event.

The bookings page also provides a handy list of who has registered for the event.

MANAGING USERS

Each member who wants access to the members-only section will have their own user account, with their own username and password. This allows you to add/remove access individually.

Users

Ultimate Member

Form emails
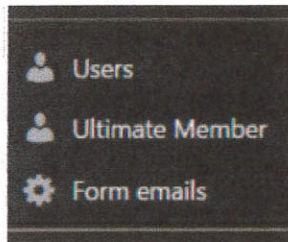
1. Click on the "Users" link in the left menu.
2. **To edit a user:** Click on their username in the list.
3. **To delete a user:** hover over their username, and choose "Delete".
4. **To add a user:** Click "Add New" at the top of the page.
    a. **Username:** Use first initial / last name (Steven Ray is "sray")
    b. **Email:** The email they contacted you with.
    c. **First and last name**
    d. **Password:** Click "Generate password".
    e. **Send password:** Click "Send password"
    f. **Role:** Should be "Subscriber" unless you're adding an administrator.
5. **Community role:** To set user's community role, do the following:
    a. Click "Users" to get the list of users.
    b. Find the user you want to modify, and check the box next to their name.
    c. In the "Community Role" dropdown at the top of the list, choose the role you want:
        i. **Member.** Default. Most users will be members.
        ii. **Admin.** Provides the ability to change Ultimate Member roles.
        iii. **No Show.** User will not show up in directory. Use this for test users, as well as members who request their information not be displayed.
    d. Click "Change".
6. **User groups.** Use this section to add/remove users from user groups:
    a. Preschool. Gives users elevated access to Preschool pages, and no access to other pages.

CONTACT FORM TOPICS AND EMAIL ADDRESSES

When a visitor submits the contact form on the website, they are asked to pick a topic their message relates to. The email is then sent to different people based on the topic chosen.

Users

Ultimate Member
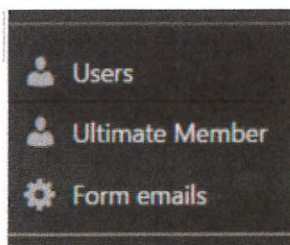
Form emails

To manage topics and the associated emails:

1. Log into the admin dashboard.
2. In the left menu, click on "Form emails".
3. You'll see a list of topics, along with up to three e-mail addresses for each one.
4. You can add a new topic, delete an existing topic, change a topic's name, and add/change/delete email addresses.
5. Make your changes, then scroll to the bottom of the page and click "Save changes."
6. **IMPORTANT: Please double-check that you entered the e-mail address correctly!** If the address has a typo, then a form's information might go to the wrong person or not be received at all.

BOARD AND COMMITTEE DOCUMENTS

To upload board and committee documents and make sure they get displayed on that board's web page, do the following:

1. Click the "Media" link in the left nav.
2. Click "Add new"
3. Upload the document(s), either through drag-and-drop or by clicking "Select Files".
4. Assign one of the following categories:
   a. **minutes:** Meeting minutes
   b. **form:** Any sort of form for people to download and fill out
   c. **sermon:** Pastor's sermon
   d. **newsletter:** The monthly Messenger newsletter
   e. **document:** Any other kind of document
5. Assign it the category of the board or committee it belongs to.
   a. For sermons, use "worship".
   b. For newsletters, use "church-life".
6. Document date: The document will automatically be given the date you uploaded it. To change it to the date the document was created, scroll down to the bottom of the page and set the "Date & time" field to the correct date.
7. The document will automatically appear in the sidebar of any page that uses the "board/committee" page template, listing any document that match the category of the page.

REDIRECTS

Sometimes, you want to be able to have one web address redirect users to another. Maybe the actual URL is too long to be practical, so you want a shorter alternative; or you want several different URLs to all point to the same place. You can do so using the Quick Redirects tab.

1. Click on the "Quick Redirects" link the left menu, near the bottom of the menu.
2. Under "Request URL", enter the URL you want users to enter.
3. Under "Destination URL", enter the URL of the page you want users to arrive at.
4. Click "Add New Redirects".

Shortcodes are short pieces of text that let you insert complex content (like a slideshow or a document list) into any page you like.

Many shortcodes allow you to add attributes to customize the content for that particular page. For instance, the Event List shortcode displays a list of events; you can add attributes to show only events from certain categories, so that only events relevant to that page are shown.

This section lists all the shortcodes used on the EMC site, along with their allowed attributes.

SLIDESHOWS

1. **[image-carousel]** Adds slideshow to the page.

CUSTOM SNIPPET

1. **[emc snippet=1]** Adds the designated snippet to the page.

CAPITAL CAMPAIGN PROGRESS BAR

1. **[capital-campaign-progress-bar]** Adds the progress bar to the page. The bar will display the fundraising total as set on the 2017 Capital Campaign page.

CONTENT STRIPES

1. **[emc-content]** Start of content stripe
2. **[/emc-content]** End of content stripe
3. **[emc-content-shallow]** Start of content stripe with less top/bottom padding
4. **[/emc-content-shallow]** End of content stripe with less top/bottom padding

EVENT LIST

1. **[emc-event-list]** Adds event list to page. By default, shows the next six upcoming events.
2. **[emc-event-list number=4]** Specifies the number of events to show.
3. **[emc-event-list category=membership,preschool]** Only show events from the indicated categorie(s).
4. **[emc_events_list]** Special, longer display of events, for detailed event rollups like the Morningside U page
5. **[emc_events_list scope="past"]** Specifies scope of events to show. Mostly use "past" and "future".
6. **[emc_events_list category="edina-morningside-u"]** Only show events from the indicated categorie(s).
7. **[emc_events_list order="desc"]** By default, events show in ascending order. Can change this to descending order with "desc".

NEWS LIST

1. **[display-posts]** Adds a news list to page. By default, shows the four most recent news items. If a post has a featured image attached, that image will be displayed as well.
2. **[display-posts posts_per_page=4]** Specifies the number of news items to show.
3. **[display-posts category=membership,preschool]** Only show news items from the indicated categorie(s).

DOCUMENT LISTS

1. **[emc-documents type=sermon]** Adds a list of document links to page. By default, shows all matching documents of the given type. Can only have one type. Types are listed under "Board and Committee Documents", above.
2. **[emc-documents number=4]** Specifies the number of documents to show.
3. **[emc-documents category=membership,preschool]** Only shows documents from the indicated categorie(s).
4. **[emc-documents display=main]** Use this if the document list will be in the main content area of the page. It leaves off the header and displays the documents in a formatted table.

PHOTO ALBUMS

1. **[emc-photo-albums]** Add list of photo albums to the page, most recent first.
2. **[emc-photo-albums number=4]** Specifies the number of albums to show.
3. **[emc-photo-albums category=membership,preschool]** Only show albums from the indicated categorie(s).

PHOTO CATEGORIES

1. **[emc-photos category="membership, preschool"]** Display all photos in the indicated categories. If no category is listed, all photos will be shown. So please pick a category.