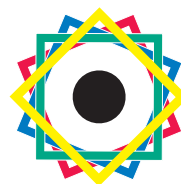




WORDPRESS TRAINING MANUAL

LAST UPDATED ON FEBRUARY 26TH, 2016



Intermountain
Eye Centers

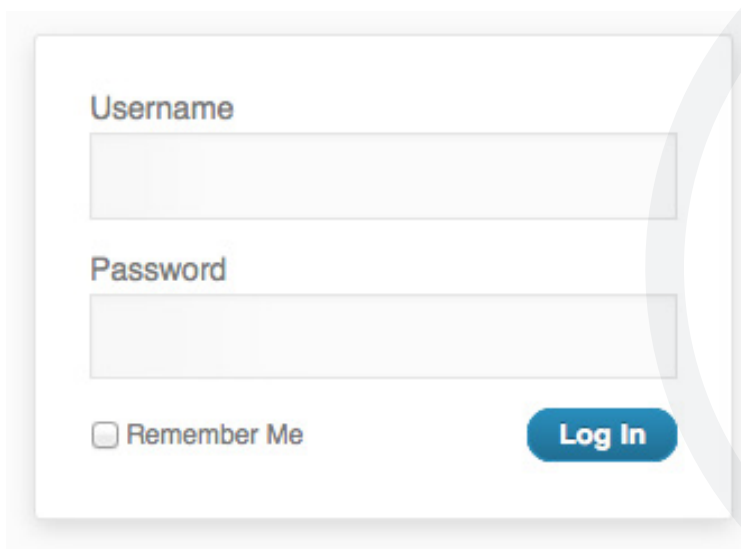
Physicians, Surgeons and
Eye Care Consultants.

LOG INTO WORDPRESS

Visit the Login page

<http://intermountaineyecare.net/wp-admin/>

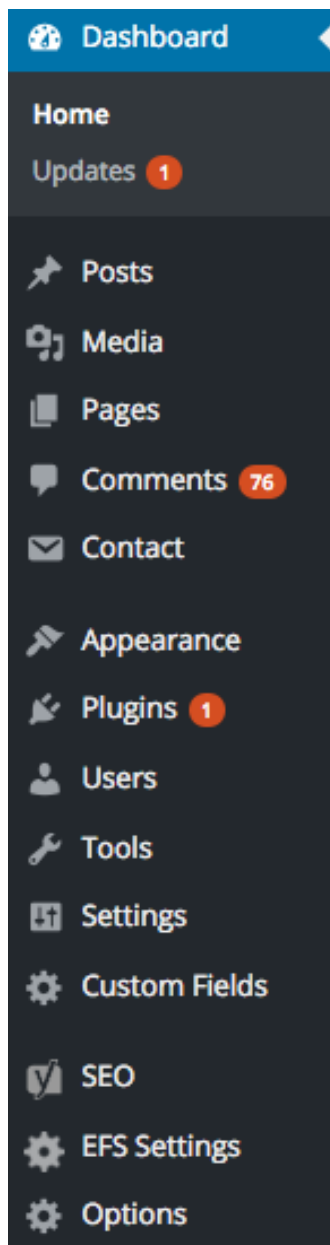
Enter your Username and Password

A screenshot of the WordPress login interface. It features a white rectangular box with a subtle shadow. Inside the box, the word "Username" is followed by a text input field. Below that, the word "Password" is followed by another text input field. At the bottom left of the box is a checkbox labeled "Remember Me". At the bottom right is a blue button with the text "Log In" in white. A large, faint, light-gray WordPress logo is visible in the background to the right of the login box.

NOTE: Additional usernames can be set up through Wordpress and specific roles can be assigned. It is a good practice to set up new User accounts for anyone accessing the site, as Wordpress will track who last edited a page. This is good to know if there will be multiple people using the site.

THE WORDPRESS DASHBOARD

The Wordpress Dashboard page lists the main sections of the site that can be maintained. There are also many plug-ins and additions that we have made to allow the site to work. We ask that you stay away from the sections that are not listed below, as those are the sections that control the “under the hood” code and could interrupt the site installation.



The sections used to maintain the site are:

POSTS — Where the “What’s New” posts are managed.

MEDIA — Serves as a reference library for all graphics and files that are uploaded to the site.

PAGES — This section is where the Pages are located and maintained.

COMMENTS — This is where comments on posts can be monitored and maintained (if the site had comments turned on).

CONTACT — Where the settings for the appointment and contact form are managed.

APPEARANCE — This is where the site menus are managed. The menus section allows you to add and remove pages from the navigation of the site.

PLUGINS — Plugins are the “under the hood” elements that add functionality to the site. We ask that you do not update these without our help.

USERS — This is where you can set administrative logins for the site.

TOOLS, SETTINGS, & CUSTOM FIELDS — More “under the hood” settings for the site functionality.

SEO — The settings that allow the site to communicate with search engines.

EFS SETTINGS — More “under the hood” settings for the site functionality.

OPTIONS — This is where you can manage the contact information, testimonials, and location information.

ADMINISTRATION TASK BAR

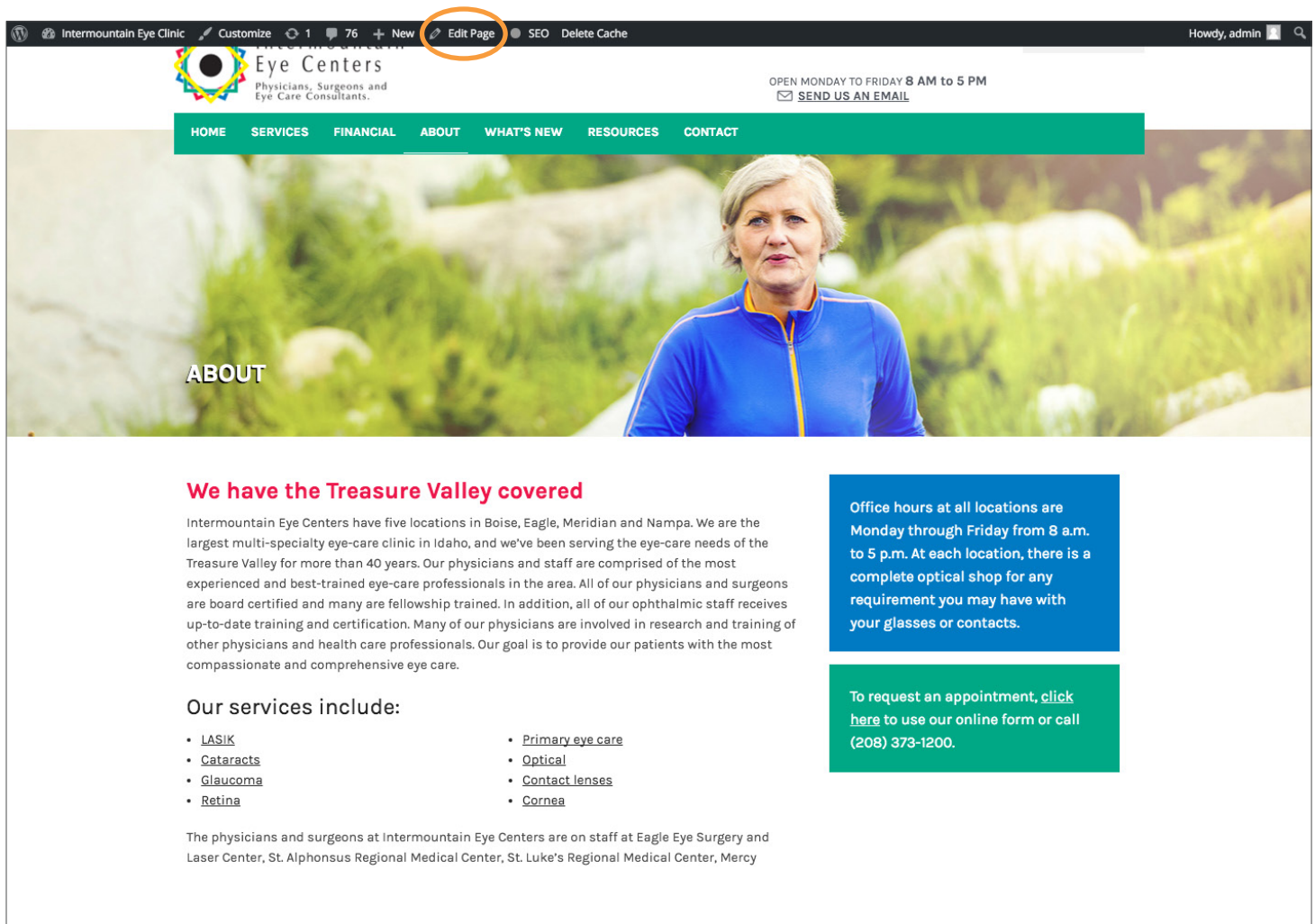
When you are logged into Wordpress, the formatting bar will be available as you navigate the site. This is the easiest way to make quick edits to a Page. Shown below is the Wordpress site administration task bar, which will allow you to click the “Edit Page” link to make a quick edit to the specific page you are on.

The screenshot shows the WordPress administration interface for the Intermountain Eye Centers website. At the top, a dark WordPress toolbar contains links like 'Customize', '1', '76', 'New', 'Edit Page', 'SEO', and 'Delete Cache'. The user is logged in as 'Howdy, admin'. Below the toolbar is the website header with the 'Eye Centers' logo, tagline 'Physicians, Surgeons and Eye Care Consultants.', and operating hours 'OPEN MONDAY TO FRIDAY 8 AM to 5 PM' with a 'SEND US AN EMAIL' link. A green navigation menu includes 'HOME', 'SERVICES', 'FINANCIAL', 'ABOUT', 'WHAT'S NEW', 'RESOURCES', and 'CONTACT'. The main content area features a large circular image of a smiling woman and the heading 'BRING YOUR WORLD INTO FOCUS'. Text below describes the clinic's 40-year history and commitment to comprehensive eye care, followed by a yellow 'Request an appointment' button. A secondary navigation bar lists services: 'LASIK', 'CATARACTS', 'GLAUCOMA', 'RETINA', 'PRIMARY EYE CARE', 'OPTICAL', and 'CONTACT LENSES'. The 'LASIK' section is active, with the heading 'Maybe it's time for LASIK' and a paragraph explaining the benefits of laser vision correction. A partial image of a woman's face is visible on the right side of this section.

EDITING PAGE CONTENT

We will use the “About Us” page as an example to show how an edit can be easily made.

1. The first step is to click the “Edit Page” button. Or, in the WP Dashboard, click pages, then locate “About” page (you may also use the search functionality within WP to find any page with a specific name).



2. Once you are in the WP admin, you will see the page content and any custom sections we have added for the page.

EDITING PAGE CONTENT (CONTINUED)

- Here you can add content, format the text, photos, and links.
- Once you have made the changes you would like, you may “Preview” the changes, or click “Update” for them to go live. When working on a new Page or Post, you may also save the page as a “Draft” so you can edit it later before publishing it.

The screenshot shows the WordPress 'Edit Page' interface for the 'About' page of Intermountain Eye Clinic. The left sidebar contains navigation links: Dashboard, Posts, Media, Pages (selected), All Pages, Comments (76), Contact, Appearance, Plugins (1), Users, Tools, Settings, Custom Fields, SEO, EFS Settings, Options, and Collapse menu. The main content area shows the 'About' page with a heading 'We have the Treasure Valley covered' and a paragraph about the clinic's services. The right sidebar shows the 'Publish' section with 'Preview Changes' and 'Update' buttons circled in orange. Below the 'Update' button, the 'Page Attributes' section is visible. A box highlights a short code in the content area, and an arrow points from it to a text block below the screenshot.

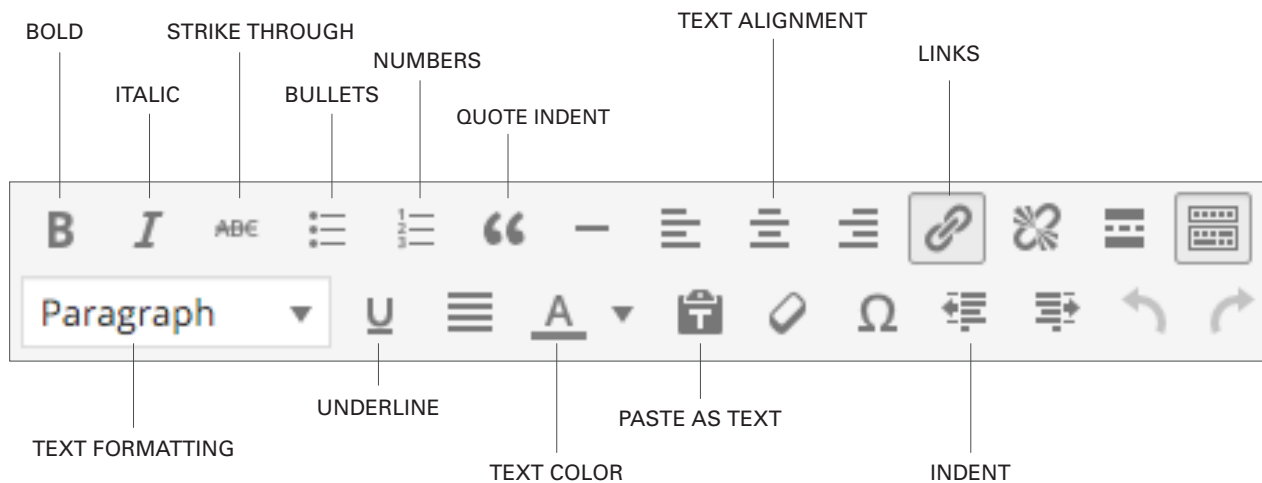
Short Code:

```
[efscolumn lg="6" md="6" smoff="0" mdoff="0" lgoff="0" ]
  • LASIK
  • Cataracts
  • Glaucoma
  • Retina
[/efscolumn]
[efscolumn lg="6" md="6" smoff="0" mdoff="0" lgoff="0" ]
  • Primary eye care
  • Optical
[/efscolumn]
```

See the section on “Short Codes” to learn how to add columns to text on the page.

FORMATTING TEXT

The Wordpress formatting bar is easy to use in formatting text using the various CSS styles that have been programmed into the site code. This is how we can maintain consistency in text formatting throughout the site.



Text Formatting

The CSS code of the website is what controls the attributes of the text formatting. Following is a list of the styles available for site content. The site's CSS code controls the typeface, size, and color. In order for changes to be made, a programmer is required to make an edit to the CSS code for the site.

Heading 1

Heading 2

Heading 3

Heading 4

Paragraph Text

- Bullet point
- Bullet point
- Bullet point

1. Numbered list
2. Numbered list
3. Numbered list

1. Heading 1 — Large Heading Title for Homepage or Call-Outs
2. Heading 2 — Section Heading Title
3. Heading 3 — Text Heading Title
4. Heading 4 — Text Heading Title
5. Intro Paragraph — Bolded paragraph headings
6. Paragraph — This is the format for main text used throughout the pages on the site. You may also use bold or italic and create hyper-links with any text.
7. Bullets Points
8. Numbered Lists

Note: When copying from Microsoft Word, make sure to click the "T" icon with the clipboard, then paste your text to strip out any ugly formatting that Microsoft includes.

CREATING A LINK

You may create a hypertext link to any text on a page, including links within the site, to external pages, or even to a PDF file that has been uploaded to the Media Library. This option is great to use if you want a customer to download a special event menu PDF.



1. To create a link, highlight the text you'd like to link and click the link button in the formatting bar.

2. When the link button is clicked, you will see a pop-up window that will allow you to set the link address and link settings. Add the URL that the link should go to. **Note: If the link is an external link, click the "Open link in a new window" check box to ensure the viewer doesn't leave the website.**

3. Click "Add Link."

NOTE: You may also create email links by entering "mailto:" and the email address.

Example = <mailto:info@intermountaineyecenter.net>

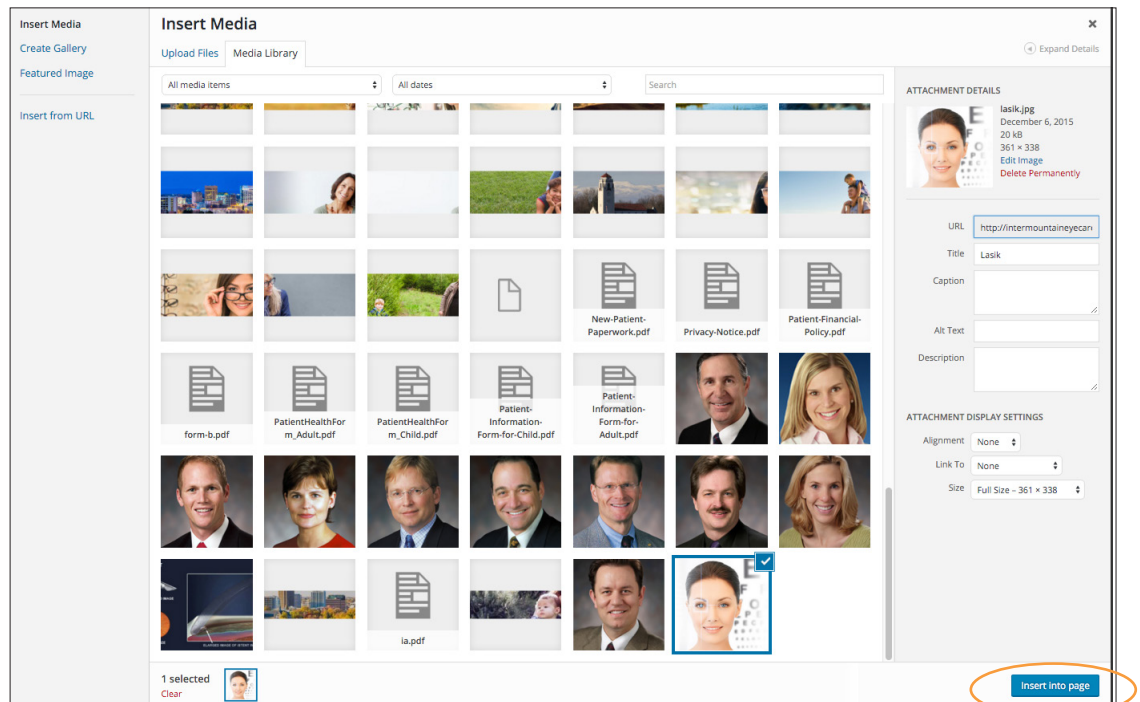
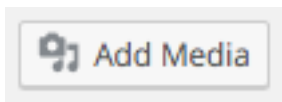
ADD A PDF FILE LINK

In order to create a link to a PDF file on the site, we must first upload the PDF file to the Media Library. To move the file to the web server, click on "Add New" in the Media Gallery. Once you drop and drag the file to upload it, you will be given a "File URL." This URL is the location of the PDF file on the web server. In order to link it to a PDF file, simply copy this URL and enter it in the "Insert/Edit Link" field.

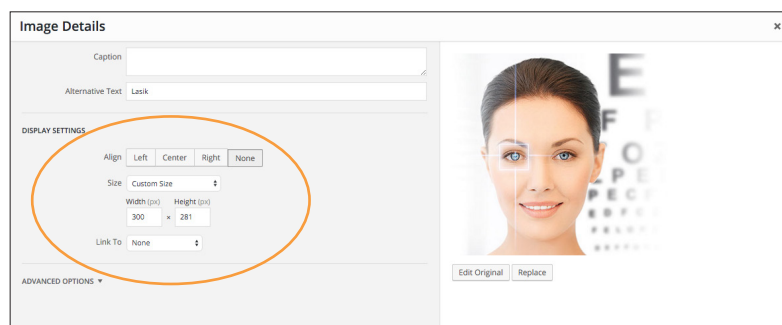
NOTE: Always choose the check box to "Open link in new window" for a PDF file, as it's not always intuitive to click the back button in a web browser.

INSERTING A PHOTO INTO A PAGE

1. To insert a photo in a post/page, we will want the photo to be saved as web resolution (72 DPI).
2. Once the image is resized, place your cursor in the content area where you would like the image to appear. Click the **"Add Media"** button to upload the image and select it. Once you upload the image, you will see the screen shown below. Choose the image you want to insert, and click the **"Insert Into Page"** button.

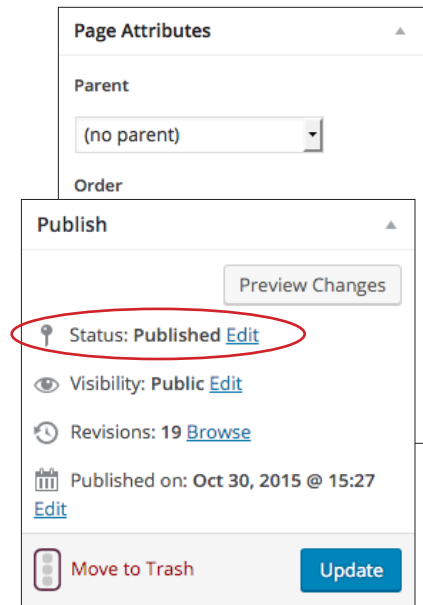


3. You can choose to have the text wrap around the photo by clicking on the photo after you have added it to the content area and clicking on the Pencil icon when you hover over the photo. Here you can edit the size and alignment.



CREATING A NEW PAGE

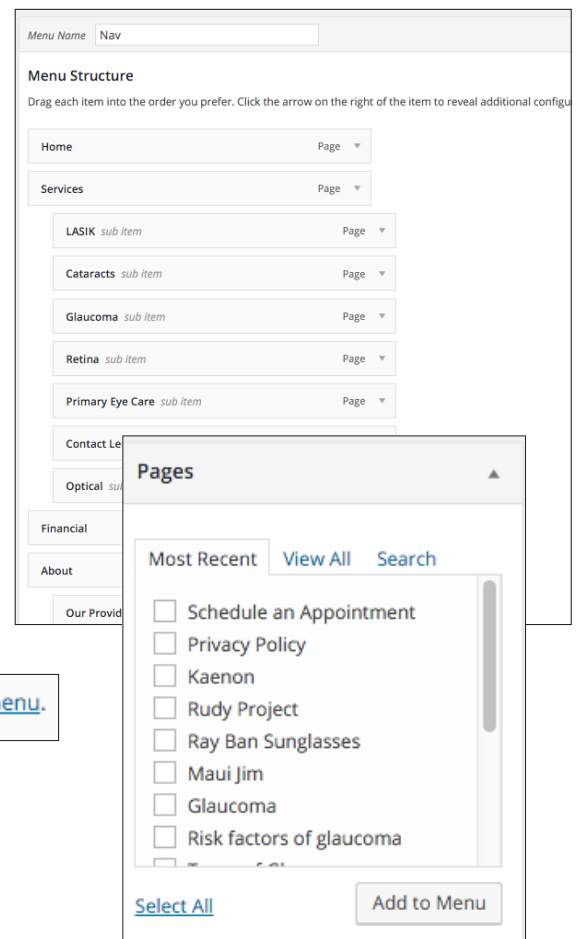
1. You will need to start by clicking Add New under the pages section of the Dashboard.
2. You will also need to assign a "Page Template." You have two choices you can choose from, "One Column and Two Column." A two column page will require a sidebar, which can be picked in the pull down directly under the template pull down.
3. If you want your page to be a subpage under a certain section of the website, you will need to select a "Parent" page. **Note: A subpage will also need to be added to the navigation. This is discussed at the bottom of this page.**
4. Now you can add content and media to the page. You can also have a featured image above the text. As soon as you are happy with the Page click "Publish" and your page will be saved to the website. You may also click "Preview" to see how the page will look without publishing it.
5. If you want to create a page and not have it posted to the website immediately. You can save it as a "Draft." Just click the "Edit" section under "Status."



ADDING YOUR NEW PAGE TO THE NAVIGATION

Once you have created your new page and published it to the website you then need to add the page to the navigation.

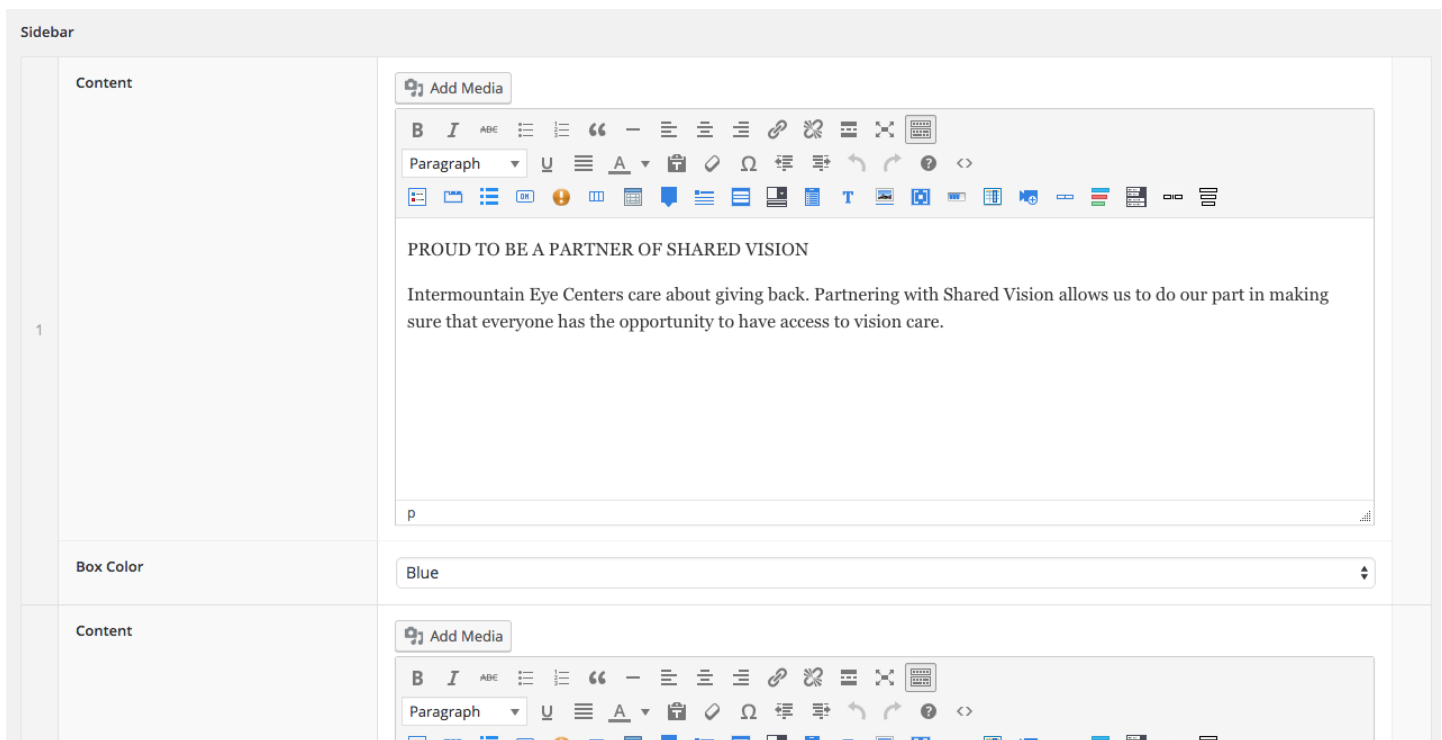
1. Start by choosing "Appearance" then "Menus" in the Dashboard sidebar.
2. Choose which menu you'd like to edit. You can choose between the Header and Footer navigation.
3. You will see a section labeled "Pages" on the left side, you will want to check the box next to the page you just created and click "Add to Menu."
4. After you have added the new Page to the menu it will appear at the bottom of the Menu Structure area. Click and drag the page wherever you want it to appear in the navigation. If your page is indented that means it will show up in a drop down menu under the corresponding parent page. Click "Save Menu"



Select a menu to edit: Nav (The Main Menu) Select or [create a new menu.](#)

SIDEBARS

The Sidebars of each Page can be managed in the area called “Sidebar.” This area allows you to manage the specific areas that may be a list of physicians, callout area, or other sidebar element.



The sidebar element can be rearranged by dropping and dragging them. Or, you can add or delete new sidebar areas to each page by clicking “Add Sidebar.”

MENUS

We give you the ability to add a new Page to the site and control where it shows up in the navigation system. The Appearance > Menus section is as easy as adding the new page that has been Published, and dragging the page to where we want it to appear on the site.

The screenshot shows the WordPress Admin Dashboard for 'Intermountain Eye Clinic'. The left sidebar contains navigation links: Dashboard, Posts, Media, Pages, Comments, Contact, Appearance (highlighted), Themes, Customize, Widgets, Menus, Editor, Plugins (1 update), Users, Tools, Settings, Custom Fields, SEO, EFS Settings, and Options.

The main content area is titled 'Menus' with a 'Manage in Customizer' link. Below this are two tabs: 'Edit Menus' (active) and 'Manage Locations'. A dropdown menu shows 'Nav (The Main Menu)' selected, with a 'Select' button and a link to 'create a new menu'.

The 'Edit Menus' section is divided into two columns. The left column, titled 'Pages', shows a list of pages under the 'Most Recent' tab. The list includes:

- ☐ Schedule an Appointment
- ☐ Privacy Policy
- ☐ Kaenon
- ☐ Rudy Project
- ☐ Ray Ban Sunglasses
- ☐ Maui Jim
- ☐ Glaucoma
- ☐ Risk factors of glaucoma

 At the bottom of this list are links for 'Select All' and an 'Add to Menu' button. Below the 'Pages' list are expandable sections for 'Posts', 'Custom Links', and 'Categories'.

The right column, titled 'Menu Structure', shows the 'Nav' menu being edited. It displays a hierarchical structure:

- Home** (Page)
- Services** (Page)
 - LASIK** (sub item, Page)
 - Cataracts** (sub item, Page)
 - Glaucoma** (sub item, Page)
 - Retina** (sub item, Page)
 - Primary Eye Care** (sub item, Page)

 Each item has a dropdown arrow on its right side.

PROVIDERS

1. Each provider is a Page on the site that is managed under the Pages section. You can edit the information for a provider by editing each Page.
2. To add a new provider, click “Add New” in the Pages section, and complete the fields for that provider. Be sure to choose a Parent Page Attribute of “Providers” for the page to be correctly formatted.
3. The “Order” field controls the sort order of the providers. To change the order, simply rearrange the numbers on each provider page.
4. The provider details is where you can manage the photo, phone number, button text, and PDF file for their CV.

Page Attributes

Parent

Providers

Template

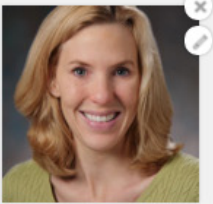
Full Width (No Sidebar)

Order

1

Need help? Use the Help tab in the upper right of your screen.

Provider Image



Provider Phone

(208) 888-0005

Yellow Button Text

View resume

Yellow Button File



Fethke-CV

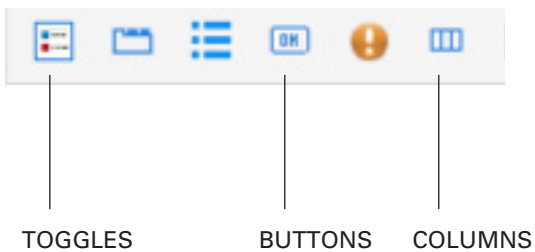
Name: [Fethke-CV.pdf](#)

Size: 66 kB

SHORT CODES

The website has special functionality built in called “short codes.” These allow you to build fancy buttons as calls to action, toggles for the sections that open on click to reveal content, and columns for layouts that require this type of layout. It is our goal to give our clients the ability to “design” the page to meet the content needs.

Shown below is the “helper” menu for short codes. This menu ensures that you can enter short codes with the click of a button.



BUTTONS

We have developed a shortcode for buttons to ensure you have the ability to add them throughout the site. You may change the size (small, medium, large), title, and link for each button.

[Request an appointment](#)

```
[efsbUTTON style="" size="large" color_class="secondary" type="link" target="false" title="Request an appointment" link="/schedule-appointment/"]
```

TOGGLES

We've given the ability to add, edit, and delete the toggles or accordions on the site. The shortcode helper will write the code for you. To build a toggle, click the icon on the shortcode toolbar. This will generate the code that can be customized.

Give the toggles a class of "standards." This will ensure the toggles take on the look and feel we want for the site.

To edit the content for the toggle title, edit what is between the quote marks for the title.

To edit the content within the toggle, change the content that is between the brackets. This is what is revealed when the toggle is clicked.

FAQs

Can blindness due to glaucoma be prevented?	⊕
What are the symptoms of glaucoma?	⊕
What are the symptoms of early acute angle closure glaucoma?	⊕
How does glaucoma affect the eye?	⊕

```
[efstoggles class="standard"]
[efstoggle title="Accordion number 1"]Toggle 1 content goes here.[/efstoggle]
[efstoggle title="Accordion number 2"]Toggle 2 content goes here.[/efstoggle]
[efstoggle title="Accordion number 3"]Toggle 3 content goes here.[/efstoggle]
[efstoggle title="Accordion number 4"]Toggle 4 content goes here.[/efstoggle]
[/efstoggles]
```

COLUMNS

We also give the ability to structure the columns on a page. This is important for the responsive nature of the site, as it allows us to ensure that the columns align in a single column for mobile phones.

This is the text in column one. This is the text in column one. This is the text in column one. This is the text in column one. This is the text in column one. This is the text in column one. This is the text in column one. This is the text in column one.

This is the text in column two. This is the text in column two. This is the text in column two. This is the text in column two. This is the text in column two. This is the text in column two. This is the text in column two. This is the text in column two.

This is the text in column three. This is the text in column three. This is the text in column three. This is the text in column three. This is the text in column three. This is the text in column three. This is the text in column three. This is the text in column three.

```
[efsrrow]
```

```
[efscolumn lg="4" md="4" smoff="0" mdoff="0" lgoff="0" ]
```

```
This is the text in column one.
```

```
[/efscolumn]
```

```
[efscolumn lg="4" md="4" smoff="0" mdoff="0" lgoff="0" ]
```

```
This is the text in column two.
```

```
[/efscolumn]
```

```
[efscolumn lg="4" md="4" smoff="0" mdoff="0" lgoff="0" ]
```

```
This is the text in column three.
```

```
[/efscolumn]
```

```
[/efsrrow]
```

OPTIONS

Under the “Options” section of the Dashboard you can edit the locations, blog header image, social media accounts (should you choose to add them), and footer images. When you are finished making edits to the information, be sure to click the “Save Options” button.

WordPress Dashboard for Intermountain Eye Clinic. The left sidebar shows the navigation menu with 'Options' highlighted. The main content area is titled 'Options' and contains a section for 'Locations'.

Location ID	Location Title	Location Address	Location Phone	Lat	Long
1	BOISE, Saint Alphonsus Campus	999 North Curtis, Suite 205 Boise, ID 83706	(208) 373-1200	43.6131585	-116.2549057
2	DOWNTOWN BOISE	251 East Front Street, Suite 110 Boise, ID 83702	(208) 342-2706	43.6086015	-116.1956172

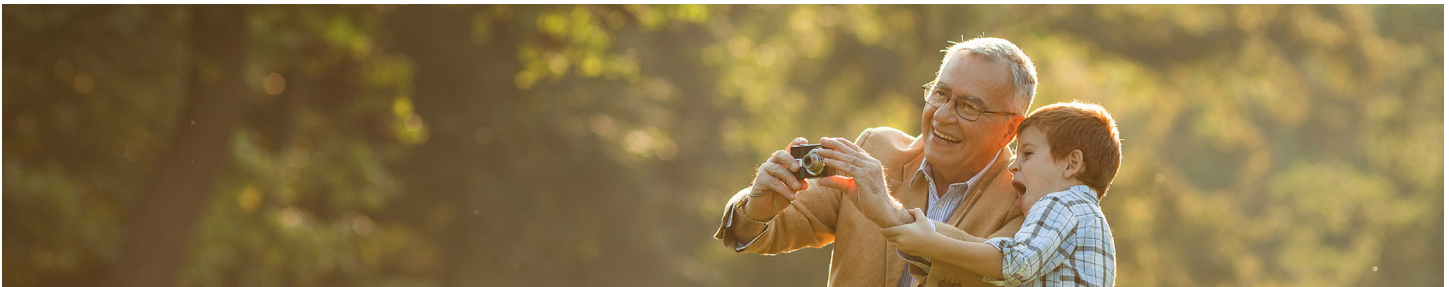
PHOTO SIZES

Your website has multiple photos throughout it and many of them are different sizes. Below is a chart that has all of the correct photo sizes you will need.



NOTE: The organization will need our help to create the images for the Homepage, as we have a Photoshop template built for this area.

Full-Width Photos 2000 x 610 pixels



Sub-Page Photos 1870 x 370 pixels



Provider Photos 357 x 445



Logos 221 x 159

WORDPRESS SEO BY YOAST

The “Wordpress SEO by Yoast” plug-in allows us to manage page titles, meta descriptions, and page titles for each page of the site. As we are not specialist in SEO, we install this plug-in for the experts to handle this as necessary. The SEO Title is the page title and should be descriptive of each page and include any keywords that should be searchable. The Meta Description is the descriptive text that shows up under each search result in Google. The Snippet Preview simulates what the result will look like in search engines after the site has been crawled by the bots and spiders of popular search engines.

The screenshot shows the Yoast SEO interface for a page titled "Services - Intermountain Eye Clinic". The interface is divided into three main sections: Snippet Editor, Focus Keyword, and Content Analysis.

Snippet Editor: This section allows you to edit the page title and meta description. The page title is "Services - Intermountain Eye Clinic" and the meta description is "Our mission is to serve you The mission of Intermountain Eye Centers is to provide the highest quality eye care available anywhere. Our physicians are train".

Focus Keyword: This section is currently empty, indicating that no focus keyword has been set for this page.

Content Analysis: This section provides feedback on the page's content. It lists several issues:

- No focus keyword was set for this page. If you do not set a focus keyword, no score can be calculated.
- The text contains 157 words, this is below the 300 word recommended minimum. Add more useful content on this topic for readers.
- No meta description has been specified, search engines will display copy from the page instead.
- The copy scores 47.8 in the [Flesch Reading Ease](#) test, which is considered difficult to read. Try to make shorter sentences, using less difficult words to improve readability.
- The page title contains 36 characters, which is less than the recommended minimum of 40 characters. Use the space to add keyword variations or create compelling call-to-action copy.