



EDITING THE RESEARCH WEBSITE

This document is a guide for using, editing, and updating the research website, cancer.wisc.edu/research, for site editors. This includes creating and editing pages, posts, and calendar events, as well as uploading photos and documents.

This document is ordered the same way as the main menu. Use the table of contents below to skip to sections. If you do not see the topic you are looking for, contact us at admin@cancer.wisc.edu.

Contents

- Logging In 3
 - The Dashboard 3
 - Google Analytics Dashboard 4
 - Your Profile 4
 - Changing your Password..... 5
- The Basics..... 5
 - The main menu 5
 - Setting permissions..... 6
 - Adding links..... 7
 - Menus 8
 - Creating a custom menu..... 8
 - Adding a menu to a page 10
- Posts..... 10
 - When to use a post 11
 - Creating a post..... 11
 - Listing posts on pages 12
 - Linking to posts 14
 - UWCCC examples..... 15
- Events..... 15
 - Creating Events 15
 - Adding calendar events to pages..... 19
 - Adding a calendar to a page 19
 - Add a list of events to a page..... 20
 - Add a single event to a page 20
- The Media Library 21



| | |
|--|----|
| About the Media Library..... | 21 |
| Size Guide for Media Library Items..... | 22 |
| Adding items to the Media Library | 22 |
| Pages..... | 23 |
| When to use a page | 23 |
| Creating a page | 23 |
| Editing a page..... | 26 |
| Reverting a page to a previous version..... | 26 |
| Comments..... | 27 |
| Documents Page | 27 |
| Adding a document..... | 27 |
| Updating a document | 27 |
| Adding documents to pages | 28 |
| Using the link..... | 28 |
| Using the Documents Listing page element | 28 |
| Faculty/Staff Members | 29 |
| Create faculty/staff members..... | 29 |
| Add faculty/staff members to a page | 30 |
| Appearance..... | 31 |
| Profile..... | 31 |
| Editing Groups..... | 32 |
| Tools..... | 32 |
| Quick links | 32 |
| Other Resources..... | 32 |

Logging In

Log into the site at the URL <https://cancer.wisc.edu/research/admin>

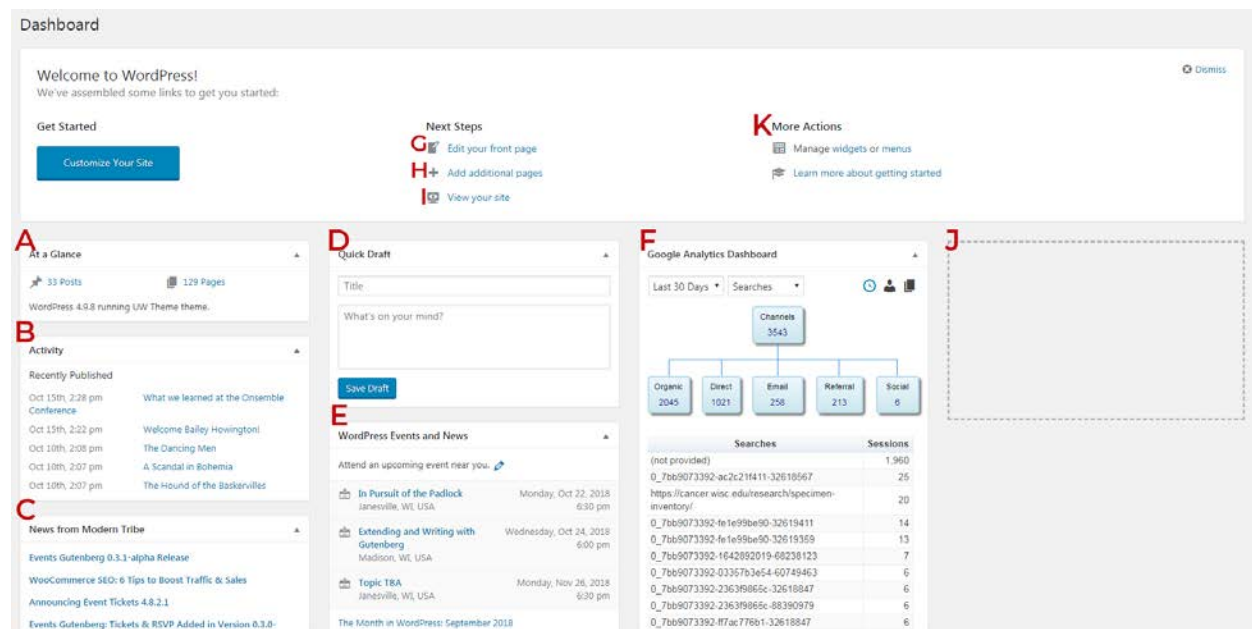
- Your username is the same as your UW-assigned Net ID
- Your password is not connected to the UW’s global login – you should set this to be different from your Net ID password

This login will not work off campus – you will need to use a UW VPN client to log in and make changes to the site.

For instructions on how to change your profile information, including your password, see [“Your Profile” on page 4.](#)

The Dashboard

Once you log in, you are brought to your personalized dashboard. That will look something like this:



The screenshot shows the WordPress dashboard with several sections and annotations:

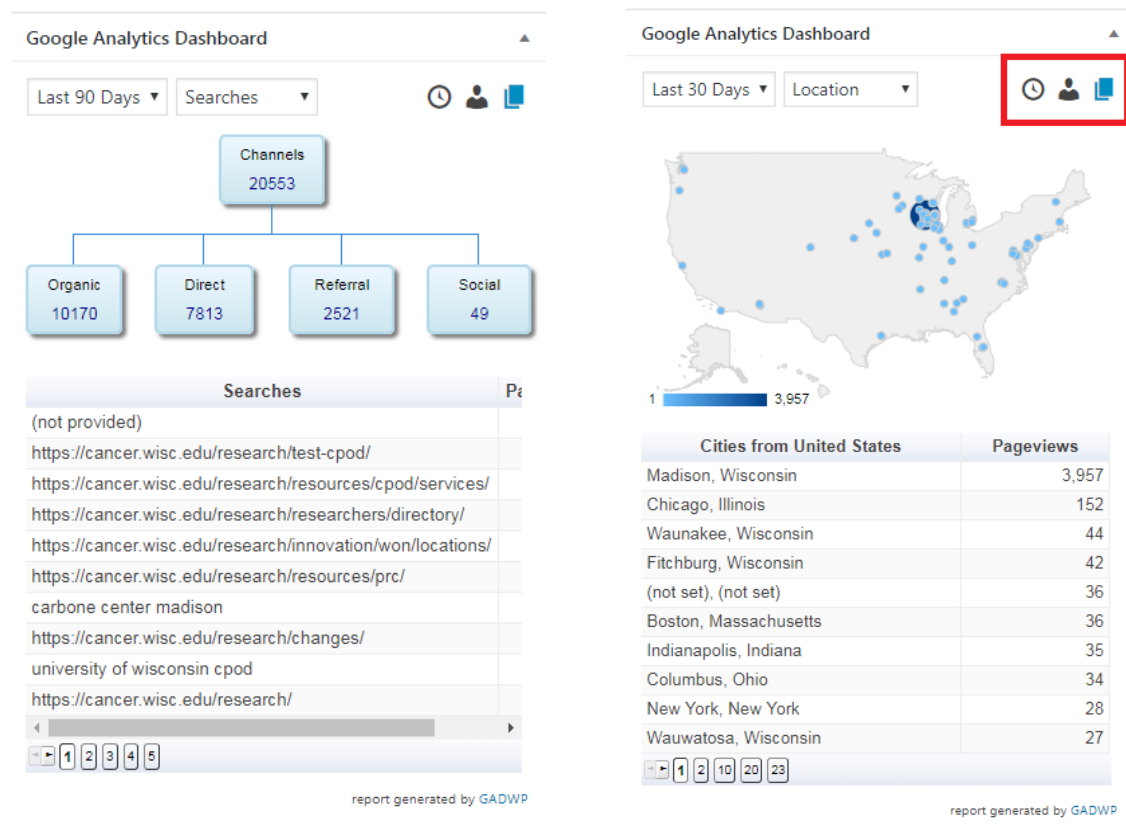
- A:** "At a Glance" section showing 33 Posts and 129 Pages.
- B:** "Activity" section listing recently published posts.
- C:** "News from Modern Tribe" section with event updates.
- D:** "Quick Draft" section for creating a new post.
- E:** "WordPress Events and News" section with upcoming events.
- F:** "Google Analytics Dashboard" showing traffic sources and search sessions.
- J:** A dashed box indicating a widget area.

- The “At a Glance” section provides a quick overview of the total number of posts and pages on the site. You will have access to a percentage of these.
- “Activity” lists the most recent posts that have been published to the site
- “News” is from the developers who created the plugin “The Event Calendar,” one of several tools on the site
- “Quick Draft” is a shortcut to creating a new post
- “WordPress Events and News” is news from WordPress and upcoming events in our area
- “Google Analytics Dashboard” is a quick view for looking at site analytics. [Read more about the Google Analytics Dashboard on page 4](#)

- g. “Edit your front page”: If you have access to edit the research site’s homepage, this is a quick link to the workspace. If you do not have access to this page, you will see a notice informing you that you are not authorized when you click on this link.
- h. “Add additional pages”: This is a quick link to create a new page
- i. “View your site” brings you to the published front page (cancer.wisc.edu/research)
- j. You can drag and drop any content widgets (items A-F) into outlined boxes such as J to customize your dashboard
- k. This list provides quick links for getting started

Google Analytics Dashboard

The Google Analytics Dashboard is a tool that shows at-a-glance information about site users.



The dashboard provides several configurations you can choose from to view data about aspects of the site including users’ locations, number of page views.


The red box indicates options that allow you to view sessions, users, and pageviews.

Additionally, the IT4C team sends out quarterly updates about the site’s performance, and in-depth dashboards are available here:

<https://datastudio.google.com/open/1gtOSNRiwzUCQsaZhI5CwrwKNw1UKvO0h>.

Your Profile

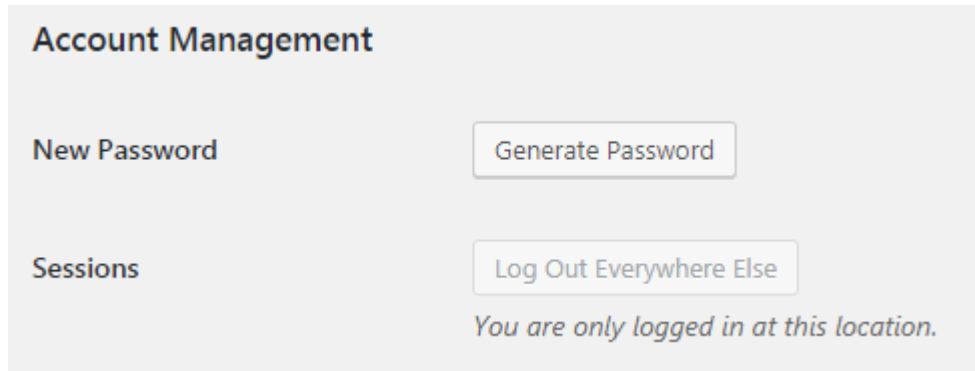
Access your profile using the link the upper right of the screen:

Howdy, Lois Lane 

This allows you to make any personalization changes, such as changing your preferred name, or updating your password.

Changing your Password

1. Click on the “Howdy, [your name]” link at the top right of the page. This brings you to a page with your information.
2. Scroll down to the “Account Management” section



3. Click “Generate Password.” This will create a suggested password. You can edit that password as desired, or type in a different password. Create a unique password for Wordpress.
4. Click “Update Profile” to save your new password

If you are logged out of WordPress and need to change your password, contact us at admin@cancer.wisc.edu. A temporary password will be set until you are able to log in and change it following the steps above.

The Basics

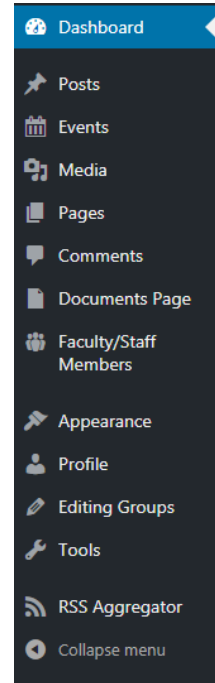
The main menu

The vertical menu on the left of the screen is a complete list of all actions that are available to you on the site. Some menu items have sub items; hovering over or clicking on sections will show what further options are available. In order, the top-level options are:

1. **Dashboard:** this brings you to the main Research dashboard
2. **Posts:** this provides a list of all the posts you have authored or have access to, and is the starting point for creating new posts, post tags, or post categories. [Learn more about posts on page 10.](#)
3. **Events:** This section populates [the events calendar](#) on the site. You can create events, organizers, and venues to list upcoming events to only the events calendar, or to list them on your pages. [Learn more about events on page 15.](#)
4. **Media:** This is the full library of all images, gifs, and documents uploaded the site. [Learn more about the media library on page 21.](#)



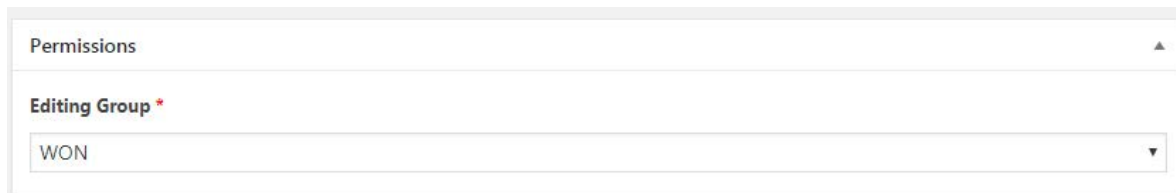
5. Pages: This provides a list of all the pages you have created or have access to, and is the starting point for creating new pages, or editing existing pages. [Learn more about pages on page 23.](#)
6. Comments: If you publish posts that can be commented on, this is where you will be able to approve or reject all comments. [Learn more about comments on page 27.](#)
7. Documents Page: This tool helps to manage documents, and will only list documents to which you have access. [Learn more about the documents page on page 27.](#)
8. Faculty/Staff Members: This section is set up to create faculty/staff bios. [Learn more about the faculty/staff members feature on page 29.](#)
9. Appearance: Some sub-items of the appearance option are accessible only to site administrators. This is where menus are housed. [Learn more about appearance on page 31 and menus on page 8.](#)
10. Profile: This is one of two ways to access and edit your profile. [Learn more about your profile options on page 4.](#)
11. Editing Groups: This is the tool that keeps sections of the site separate. [Learn about how permissions on all features works on page 6.](#)
12. Tools: This section is listed, but no options are available for editors.
13. RSS Aggregator: This tool is in beta, and is not recommended for use on your site pages.



Setting permissions

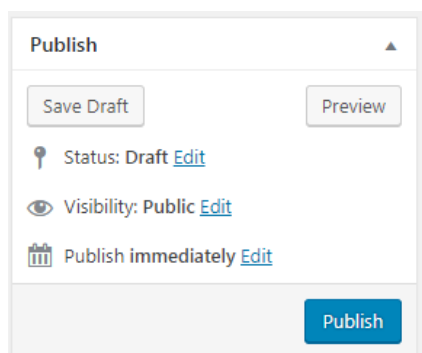
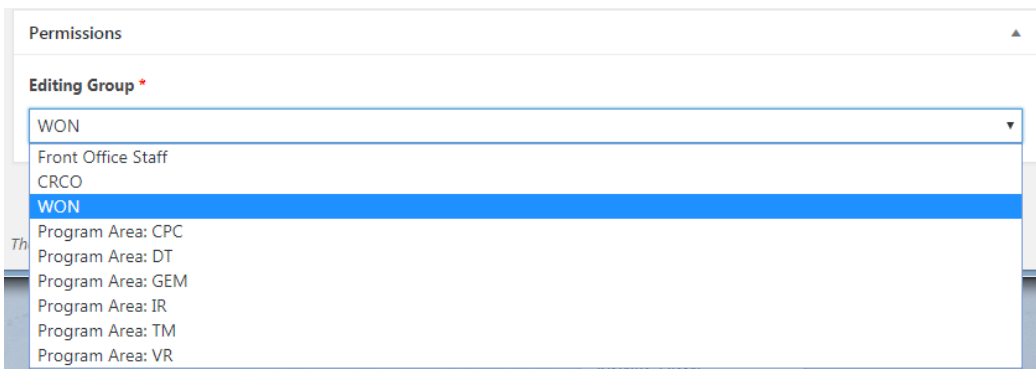
You are able to select which editors can view and edit any content that you publish. All WordPress users are assigned to one or more editing groups. Each page is assigned to one editing group. When you create new content (pages, posts, events, documents, and faculty/staff members), the new content will be assigned to your default editing group. To check that the content has been assigned to the appropriate group, do the following:

1. Scroll down to the “Permissions” field. This will be the last content layout on the page.
2. Check the editing group



3. To change the editing group, open the drop down menu and select the preferred editing group


- To save your change, scroll to the top of the page, and click “Publish” or “Update” in the publish box at the top of the page

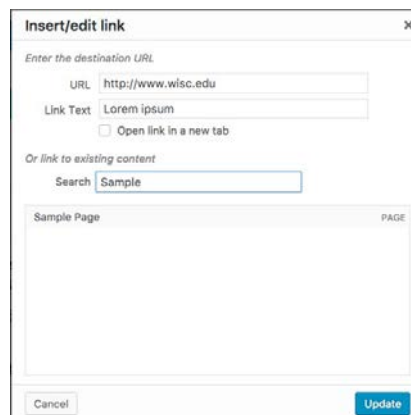


If you do not have access to pages, posts, events, documents, or staff members that you expect to, please contact us at admin@cancer.wisc.edu.

Adding links

There are two options for adding links to pages.

- Option 1: Highlight the text that you want to use as the reference (linked) text. To do so, click the “Insert/Edit Link” icon. 
 - A popup window will appear asking you to either paste/type in the URL that you want to create the link to (if external), or begin typing in the name of the page you have already created (for an internal link).



- b. To make more changes to your link, click the gear-shaped icon. This will open the Insert/edit link box, in which you can:
 - i. Change the URL, to change where users go when they click the link
 - ii. Edit the Link Text, to change what users see on the site (the text that they click on)
 - iii. Set the link to open in a new tab, so the page they are currently on stays open
 2. Option 2: Link to an item from your Media Library. Place your cursor in the location you want to place a link to the document, and click the “Add Media” button at the top of the formatting toolbar.
 - a. Search your media library for the document you want to insert, select it and observe the “Attachment Details” section at the right of the screen. The Title value that appears is the default text that will be displayed as the link when you add this linked document. Update that to an appropriate linked text, and choose the “Insert into page” button in the lower right corner of the screen.
 - b. To change the linked text (what users see on the site), do the following:
 - i. Click the link, then click the pencil icon to edit. A dialog box will appear.
 - ii. Click the gear icon to the right (the small circle with teeth). This will open the Insert/edit link box, in which you can:
 1. Change the URL, to change where users go when they click the link
 2. Edit the Link Text, to change what users see on the site (the text that they click on)
 3. Set the link to open in a new tab, so the page they are currently on stays open

Menus

Menus are lists of a group of links that you can create. An example of a menu is the main toolbar at the top of every page (see image below). You can create custom menus, edit existing menus, and add menus to pages.

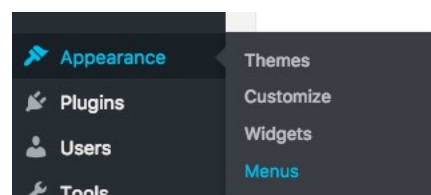


Creating menus rather than using the Group of Links page element is a shortcut to help you add the same list of links to every page. See <https://wiscweb.wisc.edu/page-elements/group-of-links/> for examples and more instructions.

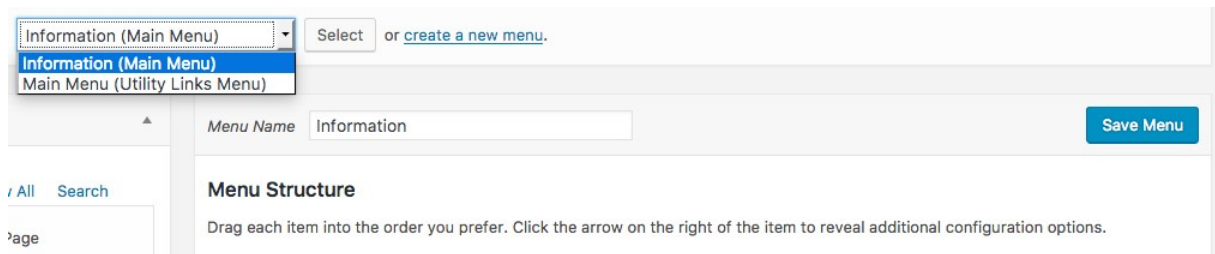
Creating a custom menu

Once you have a set of pages and posts created, you can create a menu or set of menus to use for navigating your pages. Currently, these menus are used as “Quick Links” on each of your pages to navigate to all of your subpages. To create or edit your custom menus, follow these steps:

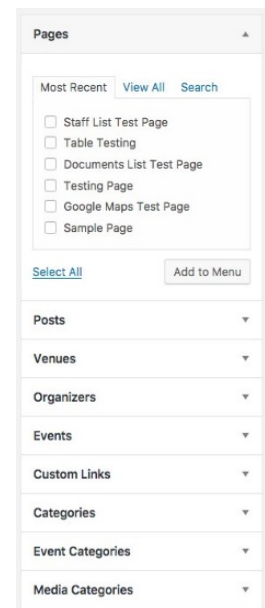
1. Hover your mouse over the “Appearance” option in the left menu, and choose “Menus”



2. If you are editing an existing menu, access it by clicking the drop down menu and selecting it. (Each menu is the name of a core or service. If you have questions about your menu contact us at admin@cancer.wisc.edu.)
 - a. To change the text that appears in your menu, click the down arrow on the right of the menu item. In the “Navigation Label” field, type in the new label for the field. This will not change the title of the page, just the text in the menu.
 - b. To remove a menu item, click the down arrow on the right of the menu item. Click “Remove” to remove the link from your menu.
 - c. To change the order of links in your menu, click and hold on items and drag and drop them into their new order.
 - d. See step 4 below for instructions on how to add new pages, posts, or links to menus
 - e. Click “Save Menu” to save your changes
3. To create a new menu, click the “Create a new menu” link.



- a. You will be prompted to add a name to your menu.
 - b. Click “Create Menu”
4. There are several options for adding pages, posts and external sites to menus:
 - a. Pages: To add pages, look in the “Pages” section on the left of the screen. This will sort by “Most Recent” by default. You can click on “View All” to see all pages, or “Search” to search for specific pages. Click the checkbox for the pages you’d like to add to the menu and click the “Add to Menu” button.
 - b. Posts: To add posts, open the “Posts” section on the left of the screen. Click in the check box for the post(s) you want to add to your menu, and click the “Add to Menu” button.
 - c. Custom Links: You can add custom links to your menu by clicking the “Custom Links” section on the left. Type or paste the URL of the external link into the URL field and type the title of the link into the Link Text field. This is what will appear for site users.
 - d. Categories: You can add Post Categories as a menu item as well. Click the check box for the categories that you want to add to your menu, and click the “Add to Menu” button. When a user clicks on a Categories link, they are brought to a list of all posts assigned to that category.





- e. Event Categories: Click the check box for the categories that you want to add to your menu, and click the “Add to Menu” button. When a user clicks on an Event Categories link, they are brought to a list of all events assigned to that category.
5. Adjust the order of menu items by dragging and dropping menu items into the order you’d like them to appear in.
6. You can add submenus by dragging pages/posts/links/categories underneath other links. It is recommended that you only add one level of submenu to a menu.
 - a. Menu sub-items will appear indented in the Group of Links page element (see <https://wiscweb.wisc.edu/page-elements/group-of-links/> for examples and further instructions)
7. Once you have created your menu, click the “Save Menu” button and check the site to make sure the menu appears as you intended.

Adding a menu to a page

There are two page elements that can use your menu as a content item: [Alternating Content Boxes](#) and [Group of Links](#). Find descriptions of both on <https://wiscweb.wisc.edu/page-elements/>.

Alternating Content Boxes

1. On your page, click “Add Page Element” where you want your menu to appear.
2. Select “Alternating Content Boxes” from the list
3. Content Area Headline (optional): Add a title to the Alternating Content Boxes.
4. Click “Add New Content Block”
5. Headline: Add a title to the block
6. Text: Add text to the block
7. Use Predefined Menu?: Check “Yes” to use your custom menu. Use the dropdown that appears to select your menu’s title.
8. Add an image to the block

Group of Links

1. On your page, click “Add Page Element” where you want your menu to appear
2. Select “Group of Links” from the list
3. Header Text (optional): Add a header that will appear before the links
4. Use Predefined Menu?: Check “Yes” to use your custom menu. Use the dropdown that appears to select your menu’s title.

Posts

A post is a way to display content for your audience, similar to a blog post. Posts provide a chronological record of announcements and news, which can range from news articles from other sites, internal announcements, and any other content you want to present to your site users.

When to use a post

Posts have an official publish date, and are most commonly used for announcements or news articles.

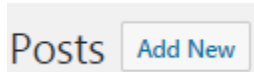
Suggested content for posts include:

- News articles about research related to your area
- Upcoming events
- New equipment
- Changes to your core/resource/research

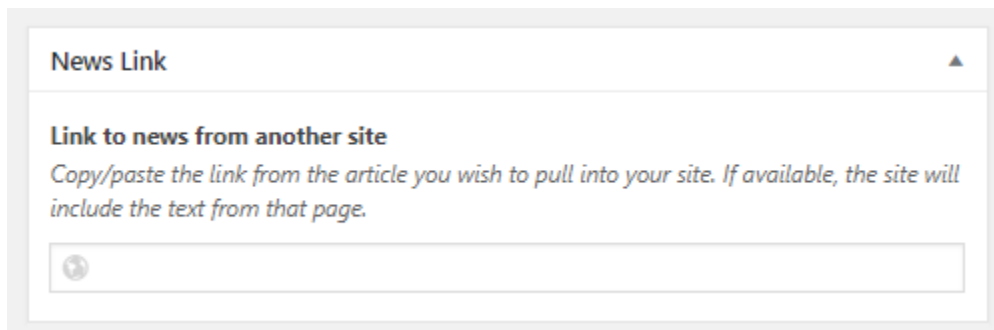
Because post listings can be limited to a certain number of posts, they work great to display the most recent information from your research area.

Creating a post

1. In the main menu, Click “Posts”
2. Click “Add New” at the top of the page

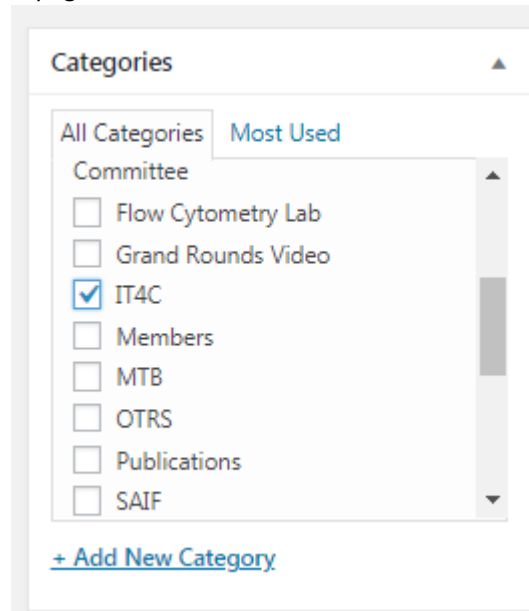


3. At the top of the page, you are prompted to add a title. This value will represent several things:
 - a. It is the internal name of the post within your Posts section
 - b. It is the value that is generated as the window or tab title when a visitor comes to the post
 - c. It is the default value that helps generate the “permalink” or URL value
4. If the content was originally published on another site, use the “News Link” section



5. Below the title and News Link sections is the Text Block text editor to which you can add whatever content you would like into the post.
6. Set editing group permissions. [Click here to jump to instructions on page 6.](#)
7. At the right, there are several options to consider as you are creating posts
 - a. “Categories” are broad topic ranges that allow posts to be further refined into groups of thoughts, allowing you to sort and group content for easier management. Categories could include News, Events, etc. When using the Latest Posts page element (<https://wiscweb.wisc.edu/page-elements/latest-posts/>), you can filter by post categories to display specific posts. Categories can also be used when you create a custom menu.
 - i. To select a Category, click in the check box for the appropriate selection.

- ii. To add a new category, click the “Add New Category” link. Type in your new category and hit the Enter key.
- iii. On cancer.wisc.edu, Categories are used to group research services. Select your core/research service title to sort, especially if you are using a “Latest Posts” feature on your page.



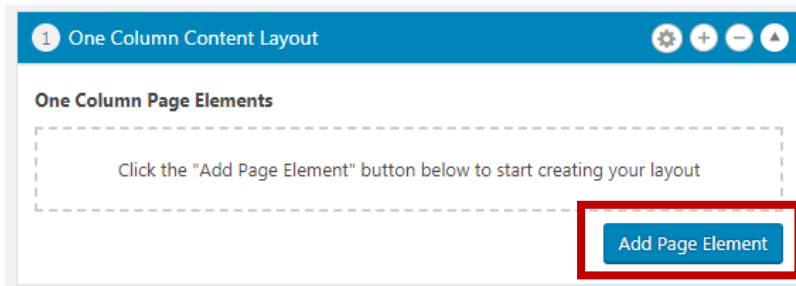
- b. “Tags” allow you to further refine the sorting and grouping abilities of posts you create. Posts that use the same tag can be grouped together by clicking on the “Tag” in a post.
 - i. To apply a tag, type the value into the tag field and click the “Add” button. You can also see what tags you most often use by clicking on the “Choose from most used tags” link.
8. Set Permissions by scrolling to the Permissions section and choosing the editing group. [More on setting Permissions.](#)
9. Publish by clicking “Publish” in the Publish box of the screen.

Before navigating away, view the published post to ensure it looks how you expected. If it does not, click on the “Edit Post” button in the top bar.

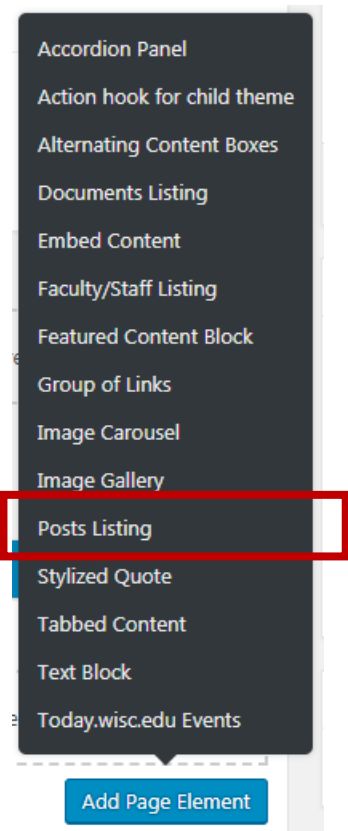
Listing posts on pages

The UW Theme includes a Page Element that helps with post listings. To use this feature, do the following:

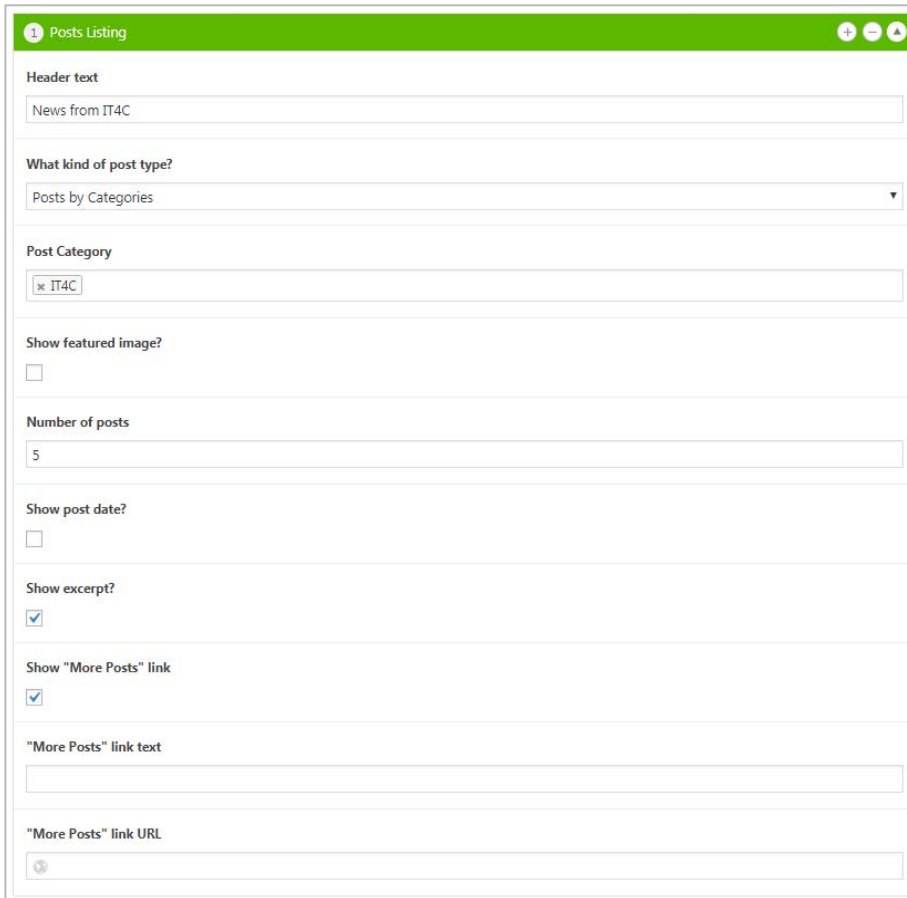
1. On the page where you'd like to list your posts, click "Add Page Element." This feature can be used in one, two, and three column content layouts.



2. From the list, select "Posts Listing."
3. Posts Listing has the following options (see fig. 1 on page 14):
 - a. Header text: Adds a title above the posts
 - b. "What kind of post type?": Allows you to select what to display, and will populate further options based on your selection:
 - i. All posts: All published posts will be listed
 - ii. Posts by categories: Select one or more categories
 - iii. Select individual posts: Choose posts by name
 - iv. Custom post types: Not recommended – this uses features from the [Event Calendar](#)
 - c. If you select Posts by Categories, you will be able to select all categories that you would like to list
 - d. Number of posts: The number of posts that are displayed. Five is the default.
 - e. Checking any of the "Show...?" boxes will display any images, excerpts, or post dates in the posts listing. This also includes the "More Posts" link, so if you have 6 total posts, but have set "Number of posts" to 5 posts, users can click "More Posts" to read older posts.



f. You can modify the “More Posts” link text to read whatever you’d like.



The screenshot shows the 'Posts Listing' settings for the 'IT4C' category. The settings are as follows:

- Header text:** News from IT4C
- What kind of post type?:** Posts by Categories
- Post Category:** IT4C
- Show featured image?:**
- Number of posts:** 5
- Show post date?:**
- Show excerpt?:**
- Show "More Posts" link:**
- "More Posts" link text:** (empty text box)
- "More Posts" link URL:** (empty text box)

FIGURE 1: BACK-END OF THE IT4C POSTS LISTING

[https://cancer.wisc.edu/research/category/\[tag\]](https://cancer.wisc.edu/research/category/[tag]). For the IT4C example, the page is cancer.wisc.edu/research/category/it4c. Linking directly to this page allows you to avoid the “number of posts” limits.

In the IT4C example (figs. 1 and 2), the IT4C category was selected for all the posts published. The Title is “News from IT4C,” and by using the “Posts by Categories” option, I’ve selected only the category “IT4C.” By not checking the “Show featured image?” or “Show post date?” boxes, neither of those features will appear on the front-end posts listing.

The “Show “More Posts” link” will populate a link that will bring users to the post category page. The next section covers this further.

Linking to posts
Each post category has its own page on the site. The URL for each is

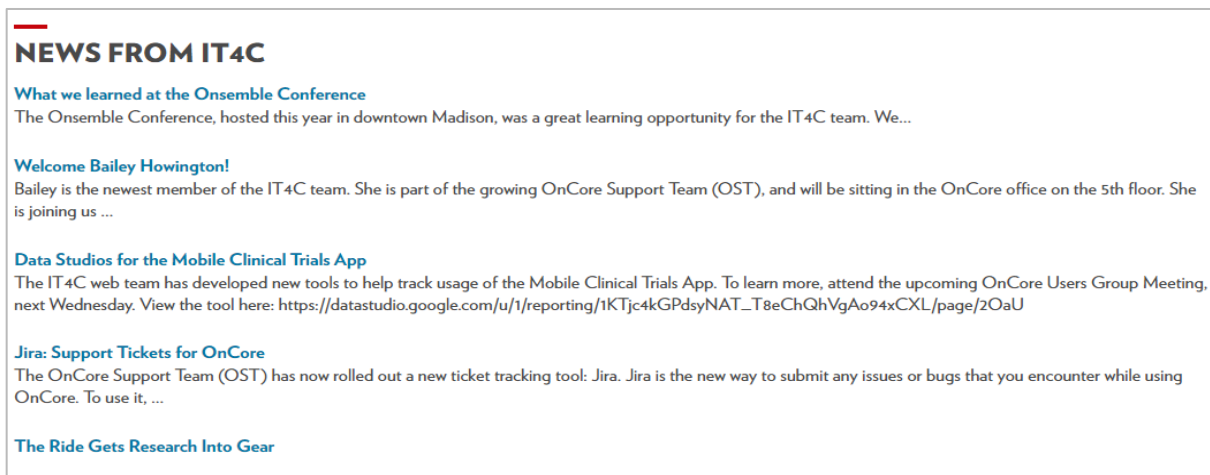


FIGURE 2: FRONT END OF THE IT4C POSTS LISTING



UWCCC examples

The Outliers site uses the posts feature to list press releases that have been published nationally in one place. Each listing uses the News Link feature to pull information from the original source and point readers back to the site where the article was originally published:

<https://outliers.cancer.wisc.edu/press/>

RECENT NEWS

Searching for Breast Cancer's "Extreme Survivors"

I remember the day I met Margaret "Peg" Geisler, who has now been living with breast cancer for 40 years, and with metastatic disease for 36 of those years. She had long outlived her original ...

June 8, 2018

Clinical Study of 'Extreme' Breast Cancer Survivors Begins

In an effort to identify factors leading to long-term survival of metastatic breast cancer, Mark Burkard, MD, PhD, associate professor, Hematology, Medical Oncology and Palliative Care, is launching an international study of patients who have survived ...

...

May 30, 2018

Wisconsin Study Seeks 'Extreme Survivors' of Metastatic Breast Cancer

Some patients can live for years, and even decades, after breast cancer has spread to their bones and other tissues. A new international study is looking for patients with metastatic breast cancer in hopes of unlocking the ...

May 8, 2018

UW Health nurse reaches out to breast cancer patients as she battles the disease herself

MADISON, Wis. – Susan G. Komen has poured \$160 million into metastatic breast cancer research since its founding. The Stage IV cancer, right now, can't be cured. But you'd never recognize some of the people living ...

May 4, 2018

Learn more about Post Listings on <https://wiscweb.wisc.edu/page-elements/latest-posts/>

Events

Events provide information about one-time or recurring events on specific dates. Information about events should be as detailed as possible. All events are listed here: cancer.wisc.edu/research/events.

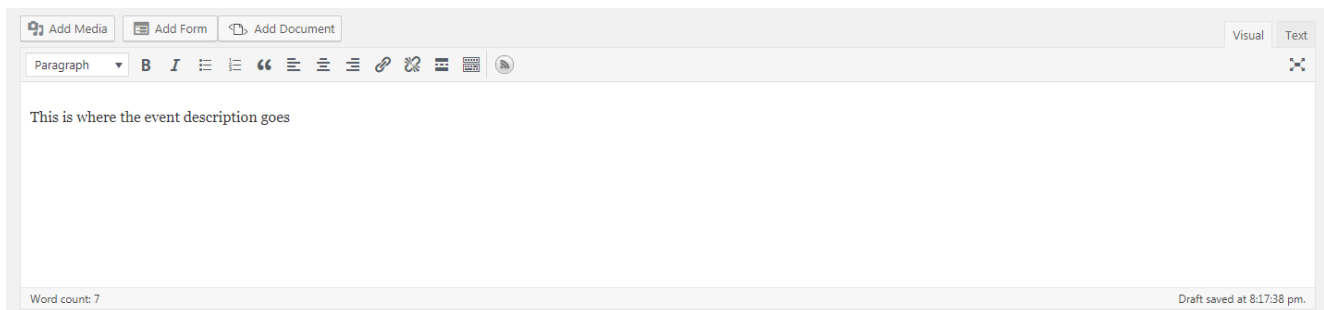
Creating Events

To create a new event, follow these steps:

1. Click "Events" in the main menu
2. At the top of the screen or in the sub-menu that appears, click on "Add New"
3. You will be prompted to add a title. This value will represent several things:
 - a. It is the internal name of the event within your Events section
 - b. It is the value that is generated as the window or tab title when a visitor comes to the page
 - c. It is the default value that helps generate the "permalink" or URL value

IMPORTANT NOTE - Changing the permalink value (by clicking “Edit”) *after* you have published the page breaks any existing links that are associate that specific page. You will need to check and update any links that exist within your site if you make these changes. This would also affect anyone who had bookmarked this page. Best practice is to finalize the Permalink prior to publishing the page

4. Below the title is the Text Block text editor, to which you can add whatever content you would like into the event. You can type directly into the Text Block, insert images, embed content, and link to other documents or sites.



5. Time & Date section:
 - a. Clicking the date options will open a date picker. Dates can also be entered manually
 - b. The time fields use dropdowns with all hours and half hours, but time can also be entered manually.
 - c. Checking the “All Day Event” box will not allow you to specify a time for the event.
6. Event Series: If the event is a recurring event, click “Schedule multiple events” in the Event Series row.
 - a. This works much like creating repeating events in Outlook. First, select how often this event re-occurs.
 - b. For events that follow a regular pattern, select either “Daily,” “Weekly,” “Monthly,” or “Yearly”

Event Series:

Every week

On

At 8:00am

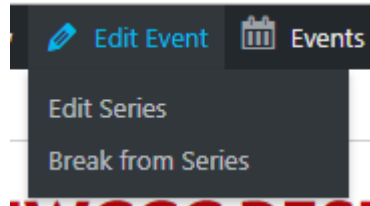
Series ends

An event every week that begins at 8:00AM on Wednesday, repeating until September 28, 2017

- i. Daily: Allows you to choose whether the event occurs every 1 to 6 days. You can specify whether this occurs at the same time or not, and also set the last occurrence.
- ii. Weekly: Allows you to choose whether the event occurs every week, or every 2, 3, 4, 5, or 6 weeks. You may also select which days of the week this event occurs.

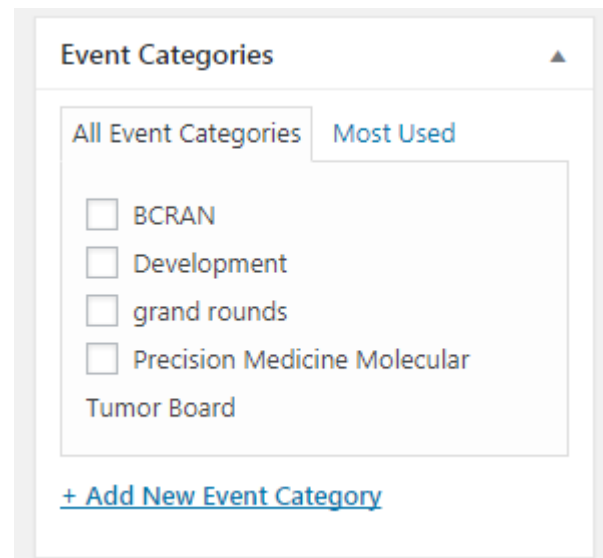


- iii. Monthly: Allows you choose whether the event occurs every month, or every 2-12 months. You may also specify whether this occurs on the same day of the month (i.e., every 16th) or different days (i.e., the first Monday). You can also specify any differing times and the last date of the event.
- iv. Yearly: Allows you to select which months of the year, and, like the Monthly option, you may specify whether this occurs on the same day of the month (i.e., every 16th) or different days (i.e., the first Monday). You can also specify any differing times and the last date of the event.
- c. If events do not follow a regular pattern, you may create individual events for each, or you may use the “Once” event series option. This selection allows you to choose one or more specific dates on which this event occurs. For each occurrence, click “Add more events.”
- d. Recurring events are treated as one event, so each time you edit one event, the changes will be applied to all other recurrences. To make changes to only one event, you must break it out of the series by clicking “Edit Event” → “Break from Series”



- e. Event will not occur: This is an optional button. You can exclude specific dates or date ranges within a recurring series. Once you add a recurrence rule, an “Add Exclusion” button will appear. This opens a selector similar to the one that sets up the event series. Select a pattern of exclusions (daily, weekly, monthly, yearly) or one-off exclusions (once)
7. Location section (optional)
- a. Venue: This is an optional field. Either select a venue you or another user has created (under the headers “My venues” and “Available venues.”)
 - i. To add a new venue, do the following:
 1. Type the name of the venue in the Venue field. Hit the enter key – more fields will appear.
 2. Add the following, as available: Address, city, country, state/province, postal code, phone, website
 - ii. To edit an existing venue, do the following:
 1. Click the Events sub-item “Venues”
 2. Click the title of the venue you would like to edit
 3. Make changes to any of the following: Venue title, description, address, city, country, state/province, postal code, phone, and website. You can also choose to show Google Maps or use latitude/longitude.
 - b. Google Maps: Selecting these check boxes will show an inset Google map with a location marker on your set venue

8. Organizer section (optional): You can add one or more organizers. Either select an organizer you or another user has created (under the headers “My Organizers” and “Available Organizers”). To add more organizers, click the “Add another organizer” button.
 - a. To add a new organizer, do the following:
 - i. Type the name of the organizer in the Organizer field. Hit the enter key – more fields will appear
 - ii. Add the following, as available: Phone, website, email address
 - b. To edit an existing organizer, do the following:
 - i. Click the Events sub-item “Organizers”
 - ii. Click the name of the organizer you would like to edit
 - iii. Make changes to any of the following: Name, description, phone, website, email address
9. Event Website (optional): Add the URL for any existing website or the original event posting
10. Event Cost (optional)
 - a. Currency symbol: Add the currency. This will usually be \$
 - b. Cost: Add the cost. To show a cost of \$0, add). To hide the field, leave blank.
11. Excerpt (optional): This is the text that will appear as the description in a search. If it is left blank, it will use any data entered in the Text Block section.
12. Set editing group permissions. [Click here to jump to instructions on page 6.](#)
 - a. Events are assigned to the Calendar Editors editing group. When you create a new event, assign that event to the Calendar Editors group before publishing.
13. Tags: allow you to refine the sorting and grouping abilities of events you create. Events that use the same tag can be grouped together by clicking on the “Tag” in an event.
 - a. To apply a tag, type the value into the tag field and click the “Add” button. You can also see what tags you most often use by clicking on the “Choose from most used tags” link.
14. Event categories helps organize events; users can search by category, or go to the page for all events with a certain assigned category.
 - a. To select a Category, check the box for the appropriate selection.
 - b. To add a new category, click the “Add New Category” link. Type in your new category and hit the Enter key.

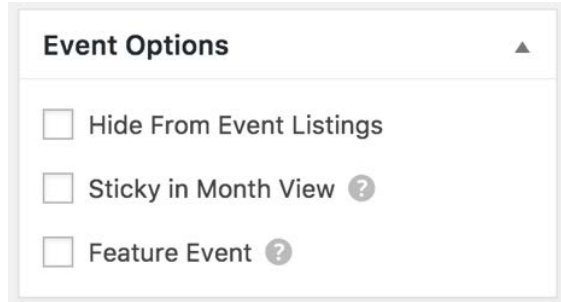




- i. Parent categories can optionally be selected for categories (for instance, if you were adding the category “Golden Retriever,” you may want to assign it the parent category “Dogs”)
- ii. Example: <https://cancer.wisc.edu/research/events/category/development/> shows the current month with only events in the Development category. Categories also let you pull out only certain events in a list. Grand Rounds does this in two locations on cancer.wisc.edu:

15. Event Options

- a. Hide From Event Listings: Selecting this option keeps the event off any calendar views on the site. It is best used when an event is being sent out via email, or a link to the event is being posted directly on a page. If users should be able to find the event throughout the site, without knowing the exact URL, do not select this option.
- b. Sticky in Month View: If many events are taking place on the same day, selecting this option will ensure that your event shows up at or near the top of event lists throughout the site.
- c. Feature Event: Selecting “Feature Event” helps to highlight a specific event. Featured events will be highlighted in event views and archives. Learn more:



<https://theeventscalender.com/knowledgebase/featured-events/>

16. Featured Image

- a. Adding a featured image adds the image to the event listing.

17. Publish the post by clicking “Publish” in the Publish box of the screen.

Before navigating away, take a look at the published event and make sure it looks how you expected. If it does not, click on the “Edit Post” button in the top bar.

For more information about events, see the Events Calendar PRO information page:

<https://theeventscalender.com/knowledgebase/pro-recurring-events/>

Adding calendar events to pages

All calendar events will appear on the Events page (cancer.wisc.edu/research/events). If you would like to list events on your page, there are several options for doing so:

Adding a calendar to a page

To embed a calendar view on a page, you can use one of the following shortcodes. To do so, copy the shortcode and paste it into a text block on your page or post.

- Month view = [tribe_events view=“month”]
- List view = [tribe_events view=“list”]
- Day view = [tribe_events view=“day”]

- Week view = [tribe_events view="week"]

See all shortcodes : https://theeventscalendar.com/knowledgebase/embedding-calendar-views-tribe_events-shortcode/

Add a list of events to a page

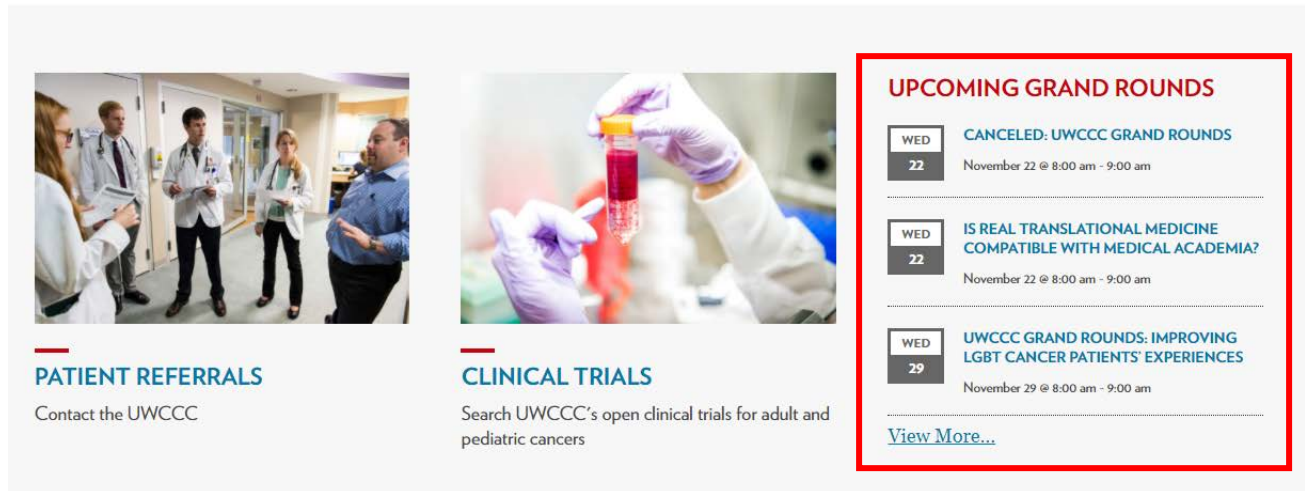


FIGURE 3: CATEGORY SHORTCODE

This shortcode only shows events that are in the specified event category. For this to work properly, the category must be selected for the event.

- Shortcode = [tribe_events view="list" category="dogs"]

The example in figure 3, above, is using the shortcode [tribe_events_list category="grand rounds" limit="3"]

See all shortcodes: https://theeventscalendar.com/knowledgebase/embedding-calendar-views-tribe_events-shortcode/

Add a single event to a page

Use the single event to list only one event on the page.

1. Find the event's ID
 - a. On the edit screen of the event, take a look at the URL
 - b. There will be a segment that includes "post=[number]", i.e., "post=713"
 - c. The number that appears after the equal sign is the event's ID, i.e., 713
2. Add the shortcode to the page. This requires more lines than other shortcodes:


```
[tribe_event_inline id="713"]
{title}
[/tribe_event_inline]
```
3. The example listed above will show the event title for event 713. Other details that can be added include a link to the event, the time, and the description. For all possible details, [see this page](#):

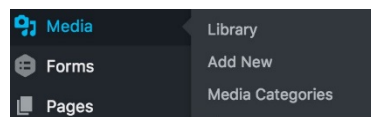
https://theeventscalendar.com/knowledgebase/embedding-single-events-tribe_event_inline_shortcode/#events.

For more information, see the developer’s site:

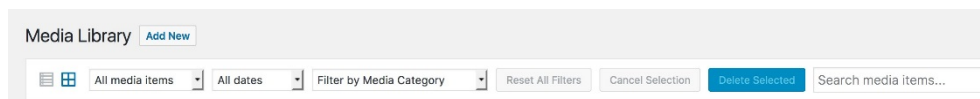
https://theeventscalendar.com/knowledgebase/embedding-single-events-tribe_event_inline_shortcode/

The Media Library

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



About the Media Library



You can view your library in either thumbnail or list view by clicking the list or grid icons on the top left of the screen.

To view specific media types, use the dropdown that reads “All Media Types” and select a category from the following: Images, audio, video, unattached, mine

- Unattached: means this this item is not currently used (attached) on any page
- Mine: These are any files you uploaded

To view items uploaded at a specific time, click the “All dates” dropdown to select a month. Items in the media library are sorted by date added by default.

Clicking an item will show more details about it. Depending on your role, you may have access to edit the following:

1. Change the title. Titles should be descriptive. For photos, titles should include the file size (i.e., “Golden Retriever 400x400”)
2. Caption: Informational text about the content of the image. This field will appear by default when an image is added to a page, but can be edited from the page without altering the caption in the media library.
3. Alt Text: **This is a required element** to help the site meet [accessibility standards](https://kb.wisc.edu/itpolicy/cio-accessibility-policy). This should be informational text that describes the content of the image, i.e., “Golden retriever with tennis ball in its mouth”. For more information about accessibility polices at UW-Madison, please visit <https://kb.wisc.edu/itpolicy/cio-accessibility-policy>



4. Description: Informational text about the content of the image. This field will appear by default when an image is added to a page, but can be edited from the page without altering the caption in the media library.
5. You may also see the following links:
 - a. View attachment page: this is the page the image lives on on the production side of the site
 - b. Edit more details: this provides more options and information about the media
 - c. Delete permanently: this link will remove the media from all locations on the site. Do not use this link – the image cannot be recovered.
6. While it is not recommended, you can also edit the image itself by clicking on the “Edit Image” button. Here, you can crop the image, rotate it, scale it, and apply the changes that you want to make to particular versions of the image.
 - a. Rather than doing this, edit any images prior to uploading them to the media library.

Size Guide for Media Library Items

Text files such as PDFs, Word, PowerPoint, and Excel documents can be any size. Large image sizes can cause slower loading times for your pages. Images should fit the following dimensions, based on where you are using them:

Page Elements:

- Alternating Content Box: Images should be at least 576px x 384px to ensure consistent display. Images larger than 576x384 will be automatically fitted to content area.
- Faculty/Staff Listing: Images should have the same width x height dimensions so that faculty/staff display uniformly. The standard is 400px x 400px
- Image Carousel: Images should have the same width x height dimensions to ensure consistent display. The maximum width x height is 588px x 392px. Smaller or larger images will automatically scale to fit the 588px x 392px space.
- Image Gallery: All images should have the same width x height dimensions

Contact us at admin@cancer.wisc.edu if you have questions about image sizes, or would like assistance re-sizing images. Learn more about each Page Element at <https://wiscweb.wisc.edu/page-elements/>

Adding items to the Media Library

To add new items, you can either drag and drop an image or document onto the Media Library screen, or click the “Add New” button at the top of the screen. Once you’ve added the media, add the following:

1. Title: Add a descriptive title of the media
2. Caption: Informational text about the content of the image. This field will appear by default when an image is added to a page, but can be edited from the page without altering the caption in the media library.
3. Alt Text: This is a required element to help the site meet [accessibility standards](#). This should be informational text that describes the content of the image, i.e., “Golden retriever with tennis ball in

its mouth”. For more information about accessibility policies at UW-Madison, please visit <https://kb.wisc.edu/itpolicy/cio-accessibility-policy>

4. Description: Informational text about the content of the image. This field will appear by default when an image is added to a page, but can be edited from the page without altering the caption in the media library.

Pages

Pages make up the basic structure of the website, giving visitors areas to visit with pertinent information about your department or program. Pages are meant to be used for static content, or content that will likely not change much over a period of time.

Pages are made up of two main features: Content layouts and page elements.

- Content layouts: This creates the structure of the page. These can be one column, two column, or three column. The layout affects how your content displays on your page by putting your content in organized columns. Before deciding which layout to use:
 - Determine why users will be visiting the page. Your homepage will likely make use of multiple columns, as sites tend to display the most popular content on their homepage. For more information, [see the KB](#).
- Page elements: These are features of the UW Theme that you can add to the content layouts. Each Page element allows you to easily create a pre-formatted function on your site like a Text Block or Accordion Panel that you can use in the layout of your pages. For a complete list of page elements, [see the WiscWeb site, https://wiscweb.wisc.edu/page-elements/](https://wiscweb.wisc.edu/page-elements/).

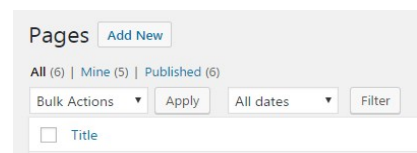
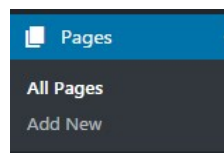
When to use a page

WordPress pages do not have a publish date and are meant for static, timeless content. For example, the [Contact Us page at https://cancer.wisc.edu/research/contact/](https://cancer.wisc.edu/research/contact/) is a page that will require very few updates. If you are announcing an upcoming event, new equipment, or changes to/announcements about your core/research, consider [creating a post \(page 10\)](#) or [creating an event \(page 15\)](#).

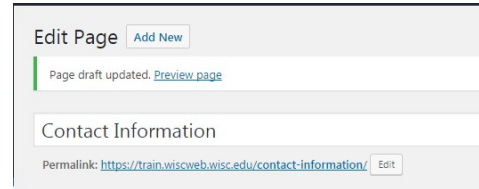
Creating a page

To create a new page, follow these steps:

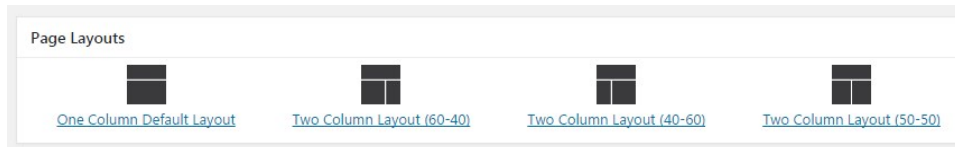
1. Click on “Pages” in the main menu
2. At the top of the screen, click on “Add New”
3. You will be prompted to add a “Page Title.” This value will represent several things:
 - a. It is the internal name of the page within your “Pages” section
 - b. It is the value that is generated as the window or tab title when a visitor comes to the page



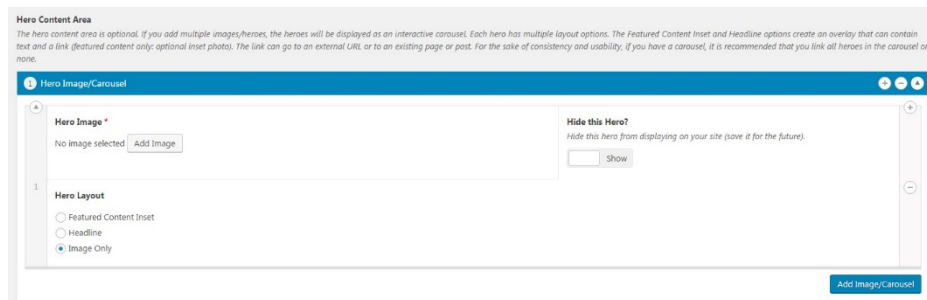
- c. It is the default value that helps generate the “permalink” or URL value
- d. **IMPORTANT NOTE:** Changing the permalink after you have published the page breaks any existing links that are associated with that specific page. You will need to check and update any links that exist within the site if you make these changes. This also effects anyone who has bookmarked the page.



- 4. Page attributes: On the right of the screen, you can select a Parent page. This adds your page to the page hierarchy on the site.
- 5. Page Layouts: The “Page Layouts” section allows you to change the initial default layout of the page. The default layout is One Column, but there are three other options to choose from. You also have the option to add additional columnar layouts below using the “Add Content Layout” button.

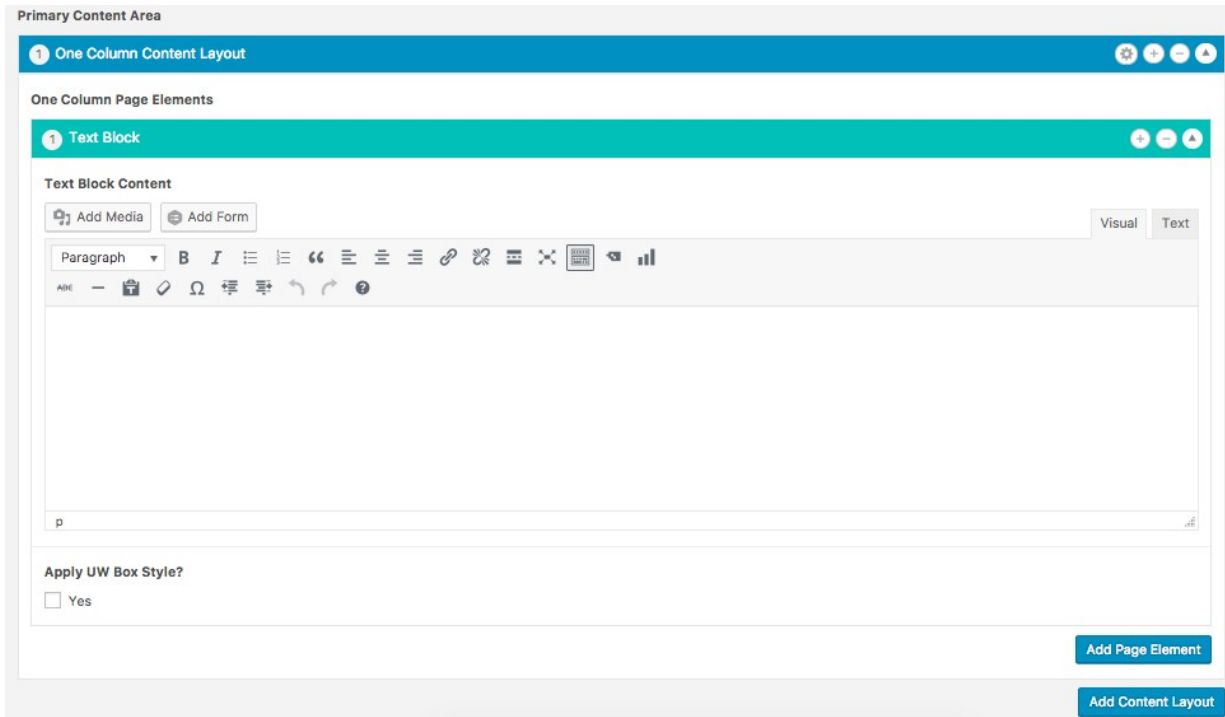


- 6. Upper Content: This section allows you to add one or more banner images to the top of the page.
 - a. Images added to this section should be 1600 pixels wide by 500 pixels tall. If you choose an image that is larger than these dimensions, it will center vertically.
 - b. To add one or more hero images:
 - i. Click the “Add Upper Content” button
 - ii. Click the “Hero Image/Carousel” button
 - iii. If you are adding more than one image, you can choose to randomize the order of the images – the initial image and the order of the carousel will change each time the page is loaded.
 - iv. Hero Image: Click “Add Image” to add an image to the carousel
 - v. Hero Layout: Select a style for the hero image.

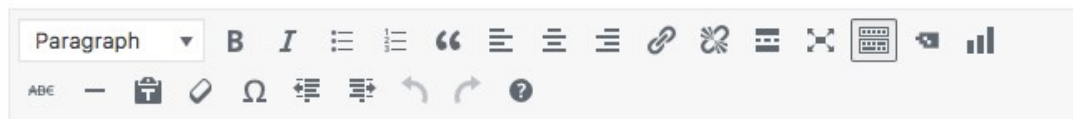


- 1. Featured Content Inset: This option allows you to add an additional image, text, and a link.
- 2. Headline: This option allows you to add a caption to the image, as well as a link.
- 3. Image Only: Only the image will display at the top of the page.

- vi. Hide this Hero?: This option allows you to show or hide the hero image.
 - vii. To add another image, click “Add Image/Carousel.” For each image, you can specify the image, hero layout, and whether or not to hide the hero.
 - c. If you are creating a carousel, it is recommended that you limit the number of images used, and ensure all images are the appropriate size (1600px by 500 px)
7. Content Area
- a. You can add as many content areas as you’d like by clicking the “Add Content Layout” button.



- b. The default Primary Content Area for a one-column layout is a Text Block. Most, if not all, of your content will exist within Text Blocks. You can type directly into the Text Block, insert images, embed content, and link to other documents or site.
- c. You can add additional content elements to your page by clicking on the “Add Page Element” button and choosing from a list.
 - i. See explanations and examples of all page elements here:
<https://wiscweb.wisc.edu/page-elements/>
- d. The Text Block formatting toolbar contains several options. Use these to format your text for your audience.

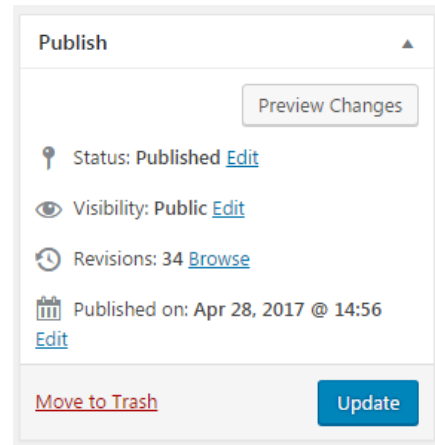


- e. At the top of the content layout (in the blue bar), you can click on the gear icon to further customize the section by adding a header, and choosing the layout for a two column layout – these include 50/50, 60/40, and 40/60.
8. Continue to add page elements and content areas until your page appears as you want it to. To preview the page, click “Preview” or “Preview Changes” at the top of the page.
9. Set permissions: [Click here to jump to instructions on page 6.](#)
10. Click “Publish” or “Update” to publish the page.
 - a. Alternatively, you can click “Save as Draft”

Editing a page

To make edits to a page, take the following steps:

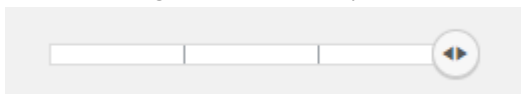
1. Click “Pages” in the main menu
2. Find the title of the page you want to edit. Click the title.
3. On the editing page, make any changes you want.
4. Click “Preview Changes” in the Publish box at the top of the screen to make sure the page looks how you’d like.
5. Return to the editing page and click the “Update” button.
 - a. Note: site users will not be able to see any changes to the page until you click the “Update” button
6. Once the page is updated, a notice reading “Page updated. View page” will appear at the top of the screen. Click “View Page” to ensure that the published page looks as you’d intended. If not, repeat steps 3 – 6 until the page is complete.



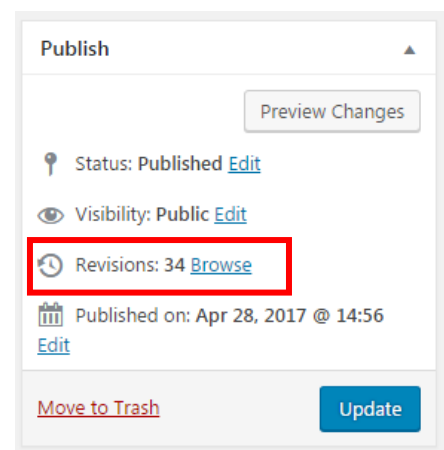
Reverting a page to a previous version

If you have made changes to a page, but would like to return the page to exactly how it looked previously, you have two options:

1. Manually make edits to the content and structure until it is the same as it was previously
2. Find the Revisions counter in the Publish box and click “Browse”
3. Use the sliding scale to look at previous versions.



4. Once you have found the version you would like to return to, click the “Restore This Revision” button at the top of the page.
5. The page will be updated to the older version.





Comments

If you publish a post that allows comments, you will be able to view all comments in this section. You must approve comments before they will appear on the site.

Documents Page

The Documents Page is similar to the [media library \(see page 21\)](#), but it is built for housing documents. It is useful for displaying monthly meeting minutes, agendas, and historical documents. It works well for replacing document versions without having to change links throughout your pages.

Adding a document

To add a document to the documents page, take the following steps:

1. Click “Documents Page” on the main menu
2. Click “Add New” at the top of the page
3. You will be prompted to add a title to the document
4. Add a document summary. This allows users to understand what the document/policy contains without having to download and open the document.
5. Document file: Click “Add file” to upload a file or choose a file from the media library
6. “Categories” are broad topic ranges that allow posts to be further refined into groups, allowing you to sort and group content for easier management. Categories could include News, Events, etc. Categories can also be used when you create a custom menu.
 - a. To select a Category, click in the check box for the appropriate selection.
 - b. To add a new category, click the “Add New Category” link. Type in your new category and hit the Enter key.
7. “Document Types” are document-specific categories. They allow you to sort and group content for easier management.
 - a. To select a Document Type, click in the check box for the appropriate selection.
 - b. To add a new document type, click the “Add New Document Type” link. Type in your new document type and hit the Enter key.
8. Set permissions. [Click here to jump to instructions on page 6.](#)
9. Click “Publish”

Updating a document

1. Click “Documents Page” on the main menu
2. Find the document that you would like to update.
3. Hover over the document in the “Document File” section. Click the “X” that appears in the right corner.
4. Click “Add file” to add the updated file.
5. Click “Update”



Adding documents to pages

To add a single document to a page, you can either get the link of the document, or use the [Documents Listing \(https://wiscweb.wisc.edu/page-elements/documents-listing/\)](https://wiscweb.wisc.edu/page-elements/documents-listing/) page element.

Using the link

PDFs:

1. Click “Documents Page” in the main menu
2. Click the title of the document you would like to link to
3. Find the document’s permalink:
 - a. Click the document’s permalink, which is listed directly under the document title. This opens the document’s page
 - b. Click the link that is provided directly under the document’s title, and is preceded by “Download”
 - c. Copy the URL that appears in your browser’s search bar
 - d. Add the permalink to the target text on your page. [Read more about adding links on page 7.](#)
4. You can also use the steps for all files, below.

All file types:

1. Use the document’s page
 - a. Click “Documents Page” in the main menu
 - b. Click the title of the document you would like to link to
 - c. Find the document’s permalink, which is listed directly under the document title
 - d. Copy the permalink
 - e. Add the permalink to the target text on your page. [Read more about adding links on page 7.](#)
2. Use the “Add Media” button
 - a. On the page you’re adding the document to, add a Text Block
 - b. Click “Add Media” in the Text Block
 - c. Upload and/or select the document to which you want to link. This adds a link to the Text Block
 - d. To change the text of the link, [read more about adding and editing links on page 7.](#)

Using the Documents Listing page element

You can use the page element [Documents Listing \(https://wiscweb.wisc.edu/page-elements/documents-listing/\)](https://wiscweb.wisc.edu/page-elements/documents-listing/) to add one or more documents to a page quickly.

1. On your page, click “Add Page Element” where you want the Documents Listing to appear
2. Select “Documents Listing” from the list
3. Title (optional): Add a title that will appear as a header at the top of your list of documents
4. What kind of document list?: Select from one of the following:



- a. Documents by Category/Type: This adds fields you can use to specify the types of documents you want listed
 - i. Document Category: Selects all documents that have been assigned to the category or categories you select. Use the dropdown selector to choose which categories you would like to include
 - ii. Document type: Selects all documents that have been assigned to a certain document type. Use the dropdown selector to choose which categories you would like to include
 - b. Select Individual Documents
 - i. Use the dropdown selector to choose the titles of the specific documents you'd like to list
5. Include Summary?: Check this box to include the text provided in the summary section of the Documents Page

Once you have completed adding documents or document listings to the page, preview and publish your page as usual.

Faculty/Staff Members

The Faculty/Staff listing allows you to display a series of faculty, staff, or other persons on a page. To create faculty/staff members to list, take the following steps:

Create faculty/staff members

1. Click "Faculty/Staff Members" in the main menu
2. Click "Add New" at the top of the page
3. You will be prompted to add the following. Only items marked with red asterisks (*) on the editing page are required:
 - a. First Name*
 - b. Last Name*
 - c. Credentials: This field is best used for degrees, such as PhD, MD, etc.
 - d. Headshot: click "Add Image" to upload and image or select and image from the media library.
 - i. Note: Always use a square image to avoid the image being cropped on the site
 - ii. Preferably, use an image that is at minimum 400 pixels by 400 pixels
 - iii. If no image is uploaded, a photo of Bucky Badger will be used
 - e. Email
 - f. Phone
 - g. Title
 - h. Address
 - i. LinkedIn URL



- j. Biography
- k. Extra Fields: this is great for additional fields you would like to list. To add:
 - i. Click “Add extra data”
 - ii. Label: This is value that will appear before the colon, i.e. for “Undergrad: University of Wisconsin – Madison,” this would be “Undergrad”
 - iii. Value: This is the value that will appear after the colon, i.e., for “Undergrad: University of Wisconsin – Madison,” this would be “University of Wisconsin – Madison”
 - iv. URL (optional): This will make the “value” field into a link. In the example above, adding the URL wisc.edu would make University of Wisconsin – Madison into a link that brings users to wisc.edu
4. Do not use the “Categories” selector for Faculty/Staff Members. Instead, use the “Faculty Types” selector directly beneath it. “Faculty Types” are broad ranges that allow you to sort and group faculty/staff on your page(s).
 - a. To select a Faculty Type, click in the check box for the appropriate selection
 - b. To add a new category, click the “Add New Faculty Type” link. Type in the new faculty type and hit the Enter key
5. To preview the page, click “Preview” or “Preview Changes” at the top of the page.
6. Set permissions: [Click here to jump to instructions on page 6.](#)
7. Click “Publish” or “Update” to publish the faculty/staff member.

Add faculty/staff members to a page

You can use the page element [Faculty/Staff Listing \(Faculty/Staff Listing\)](#) to add faculty, staff, or other persons to a page.

1. On your page, click “Add Page Element” where you want the faculty or staff members to appear
2. Select “Faculty/Staff Listing” from the list
3. Listing Title (optional): Add a title that will appear as a header at the top of the listing
4. What kind of faculty/staff listing?: Select from one of the following:
 - a. All Faculty/Staff: this will list all faculty/staff that have been added to the site
 - b. Faculty/Staff by type: This uses the “Faculty Types” selector you may have checked when creating members.
 - i. Use the dropdown selector that appears to select the faculty/staff type(s) you would like to list
 - c. Select Individual People: Choose people by name.
 - i. Use the dropdown selector that appears to select the specific members you would like to list
5. Number of columns: Choose a number between one and 4. This will create a table on the page with that number of members in each row.



6. Last Name first?: lists names and sorts using last name (i.e., Badger, Bucky; Bailey, Howard would be the order)
7. Display credentials for faculty/staff: Choose whether to display this field. If you select this and a member does not have data in the field, it will not appear
8. Display Email address for faculty/staff: If you select this and a member does not have data in the field, it will not appear
9. Display phone number for faculty/staff: If you select this and a member does not have data in the field, it will not appear
10. Display title/position for faculty/staff: If you select this and a member does not have data in the field, it will not appear
11. Display address for faculty/staff: If you select this and a member does not have data in the field, it will not appear
12. Display LinkedIn icon for faculty/staff: If you select this and a member does not have data in the field, it will not appear
13. Show biography: If you select this and a member does not have data in the field, it will not appear
14. Display photos: If you select this and a member does not have data in the field, a photo of Bucky Badger will be used instead
15. Image Size: Select an option:
 - a. 400 pixels square: This will show images that are all 400x400 pixels. If images you have uploaded are larger or smaller than this, they may not display how you want
 - b. Thumbnail: this will display a small image
 - c. Custom: this is best if you have uploaded images that are all the same size, but are not square or not 400x400. Enter the height and width in the fields that appear
16. Include Summary?: Check this box to include the text provided in the summary section of the Documents Page

Once you have completed adding faculty/staff listings to the page, preview and publish your page as usual.

Appearance

The Appearance section is most for administrators, but you can access the [Menus \(page 8\)](#) section by hovering over “Appearance” and clicking “Menus.” [Learn more about menus on page 8.](#)

Profile

Profile is another way to access your user profile and change your password. [Read more about your profile on page 4.](#)



Editing Groups

Editing Groups is a plugin that is used to limit who can edit your pages, and which pages you can edit. It is not recommended that you make edits to this section. While you will be able to create a new editing group, you will not be able to make changes to it.

If you would like to make changes to who can access your pages, please contact us at admin@cancer.wisc.edu.

Tools

While this is listed, you do not have access to this section.

Quick links

- [Hero Images \(page 24, item 6\)](#)
- [Parent Pages \(page 24, item 4\)](#)
- [When to use a page \(page 23\)](#)
- [When to use a post \(page 11\)](#)
- [About the theme \(https://uwtheme.wordpress.wisc.edu/\)](https://uwtheme.wordpress.wisc.edu/)
- [About WordPress \(https://wordpress.wisc.edu/\)](https://wordpress.wisc.edu/)

Other Resources

Accessibility Resources

- [McBurney Disability Resource Center – mcburney.wisc.edu/](http://mcburney.wisc.edu/)
- [Web Accessibility in Mind – webaim.org](http://webaim.org)

Change request form – <https://cancer.wisc.edu/research/changes>

Google Analytics (must log into Google with Net ID):

<https://datastudio.google.com/open/1gtOSNRiwzUCQsaZhI5CwrwKNw1UKvO0h>

Photos (requires Net ID login) – go.wisc.edu/photo

Support Email – admin@cancer.wisc.edu

UW Logos - <https://brand.wisc.edu/web/logos/>

UWCCC Logos - <https://cancer.wisc.edu/research/media-library/logos/>

WiscWeb Knowledge Base – kb.wisc.edu/wiscwebcms

WiscWeb Service Information Site – wiscweb.wisc.edu

WordPress Demo Site - <https://uwtheme.wordpress.wisc.edu/>