Notes, tips, and instructions for content management on new website

1. **Training resources and help:**
    - http://beersdesign.com/wordpress-basics-dashboard-introduction
    - http://beersdesign.com/wordpress-basics-create-a-new-post
    - http://beersdesign.com/wordpress-basics-adding-an-image
    - (for administrators) http://beersdesign.com/wordpress-basics-creating-a-new-page
    - http://beersdesign.com/wordpress-basics-pages-vs-posts
    - http://codex.wordpress.org/Writing_Posts

    HELP

    - http://codex.wordpress.org/Troubleshooting - a number of helpful sections, including Where to Start, WordPress Support Forum, Using the Support Forums, FAQ.

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2. **To edit an existing entry –**
    a. Use your credentials to log in to Wordpress administration site, **http://fiscalpolicy.org/wp-admin/**. (Please note that you can control the way Wordpress is displayed to you. In particular, in the upper right corner there is a button “Screen options” which you can use to select what is shown on the screen.)
    b. Under “Posts” select the first option, “Posts.” All existing posts will be displayed. Those that you have permission to edit will be clickable.
    c. To view only those posts in a particular category, use the “View all categories” drop-down (just above the table of posts) to select the category, and click “Filter.”
    d. You can also view only posts with publication dates in a particular year.
    e. Or, use the search box to find posts with particular word or words in the title or body.
    f. Click on the post title, or on “Edit,” to edit. If the post comes up in html view, you can click on “Visual” (to upper right of the pane showing the body of the post, above the tool bar) for a more familiar view.
    g. Edit as desired. The publication date, title, and “slug” (post’s URL automatically generated by Wordpress) as well as the body of the post can all be changed.
    h. Click on “Update” to save all changes.
    i. View post to check any new links and to make sure all is well.

3. **To create a new "substantive" entry** – FPI report/press release etc. –

    a. Use your credentials to log in to Wordpress administration site, **http://fiscalpolicy.org/wp-admin/**
    b. Under "Posts" select "Add New."
    c. Enter the title. (Do this promptly, since Wordpress derives the post's URL from the title. If no title is supplied, it will instead use a number for the URL, which is less descriptive.)
    d. Start the body of the post with the date of the article (format: September 7, 2012) followed by a period, in bold.
    e. Also set the publication date (if other than today) according to which the post should be arranged in chronological order. Details given in #6 below.
    f. For research, press release, oped, etc. items, make sure that for every entry you:
        i. Choose the categories for all the topics that the entry is related to (choose the correct topics and sub-topics)
        ii. ALSO choose FPI as the author
        iii. ALSO choose the appropriate year as a category
        iv. ALSO choose the appropriate "type" category or categories. **If the item is not about research by FPI**, do not choose a publication type; instead, make the item a "Blog" post (see #6 below).

    Note: This step is what directs Wordpress to include this post in the "New from FPI" list on the home page. If no categories are chosen in step #3f, the post will be classified "Blog" by default. (See #5 below.)
    g. Place quotations or excerpts in a callout box. To place text in a callout box, highlight the text and click the double-quote-mark button.

4. **Creating other entries: Follow the procedure in #3, with the following variations:**

    a. To create an **"FPI in the News"** entry –
        i. Use the article's title as the post title.
        ii. Start the body of the post with the date (format: September 7, 2012) followed by a period, in bold. Also use the article's date for the publication date (see #6 below).
        iii. Instead of step #3f, check off "In the News" and (if appropriate) one of the subboxes.
        iv. Add a link to the article. (See #7 below.) If desired, use a block quote to highlight an especially relevant part of the article. (See #3h above.)
        v. Also choose custom field "outlet" and insert the name of the media outlet. (If you don't see the custom field area on your screen, use the instructions in #2a to make it appear.)
        vi. Check your work! After having published the post, view the post and check all links. Then visit the home page to make sure the post shows up properly in the "FPI in the News" section.
        vii. Finally, give the Administrator a heads up so that he or she can update http://fiscalpolicy.org/fpi-internal-news-archive with the new information.
        viii. Please note that checking off any of the categories described in step #3f

will cause the item to be listed on the home page under "The Latest from FPI" as well as "FPI in the News." This should be avoided. For those news articles that remain particularly important, it will be possible to maintain its post in the topic area of the website once the original post is no longer one of the ten most recent "FPI in the News" and so no longer appears on the webpage. Just edit the post to check off at least one of the categories in step #3f.

b. To create a "**People's Business**" entry –
    i. Use the guests' names as the post title (if the entry is for a show).
    ii. Start the body of the post with the date of the show (format: September 7, 2012) followed by a period, in bold.
    iii. For the publication date (see #6 below) use the show's date, if past, or today's date, if in the future.
    iv. Instead of step #3f, check off "The People's Business."
    v. Add interest to the post by including links to guest bios and organizations. (See #7 below.)
    vi. Check your work! After having published the post, view the post and check all links. Then view http://fiscalpolicy.org/category/the-peoples-business to make sure the entries are showing up properly (usually, reverse chronological order).

c. To create an "**Events**" entry –
    i. Start the body of each post with the date (format: September 7, 2012) of the event followed by a comma, followed by the city-town-village-borough, followed by a period, all in bold. For the publication date (see #6 below) use the event's date, if past; use today's date, if the event is in the future.
    ii. If the event date is in the future, use the future tense. After a sentence or two describing the event, include a mention of the speaker/panelist that FPI is providing – or other FPI connection.
    iii. Instead of step #3f, check off "Events."
    iv. Add a link to the sponsoring organization and if available, online registration. (See #7 below.)
    v. Check your work! After having published the post, view the post and check all links.
    vi. Then view http://fiscalpolicy.org/category/topics/events to make sure the entries are showing up properly (**reverse chronological order for past events – but, for upcoming events, chronological order**). Change the order, if needed, by manipulating the post's publication date relative to other Events posts. **Also, this is a great time to check that all events that are now in the past have been changed to the past tense.**

5. To create a "**Blog**" entry – **Follow the procedure in #3, with the following special considerations:**

a. Start the body of the post with the date of the article (format: September 7, 2012) followed by a period, in bold. Generally, this date (and the publication date) will be today's date. However, it is also possible to create blog posts with publication dates in the past.
b. Capture/summarize the main idea of the post in the lead paragraph.
c. The most successful blog posts treat a single topic and come in at no more than about 250 words. A chart (see #11 below) with just enough text to explain it (with links to more detailed information, if appropriate) can make for a very effective post. If your piece is longer, consider breaking it into parts.
d. Blog posts will not show up on the home page under "The Latest from FPI" unless one or more of the categories listed in step #3f, is checked off. However, any and all blog posts will appear on http://fiscalpolicy.org/category/blog.
e. Visual components are especially important for blog posts. Please include one! Of all our content, images of FPI charts are most likely to be picked up by other bloggers. (See #10 below.)
f. Also include links to outside resources as well as relevant posts on our own site. At least for the former, be sure to check off the box to open the link in a new tab/window. (See #7 below.)

6. **Setting an entry's date**

For each item you enter as a post, make sure you manually update the date to reflect the correct date for that entry (if other than today). To manually set the date:

a. In the Wordpress Dashboard, when creating or editing a post, look in the top box in the right sidebar. Find the little calendar icon with "Publish Immediately" and "Published on: xxx" – click the "edit" link.
b. That will reveal a place where you can set the month, date, year and time. Most often there is no reason to worry about the time, but do change the date to the release date for the post. This is usually today's date, and usually will also match the date typed into the entry. However, it is possible to draft posts that appear to be published in the past, and it is also possible to set the publish date independently from the date that appears in the post.
c. Make sure to click the "OK" button to save your date change.

Note: The date set here is used to determine the order in which all entries are displayed (in reverse chronological order) on the website. If you enter something from the past and don't change the date manually, it will get the date/time you *created the post*, and will therefore display out of the correct order.

7. **For any link to an external source –**

a. Use the cursor to highlight the text that you want to display as linkable.
b. Use the link icon.
c. Type or paste in the URL, making sure to check off the box to open the link in a new tab/window.

d. Check the link after you publish the post to make sure it is working as expected.

8. **To include a link to a pdf in the post** –

   a. Click the location in which you want the link to appear.
   b. Go to the "Upload/Insert" area just above the toolbar, and click on the sun-shaped icon (the fourth icon). This will allow you to select a file from your own computer.
   c. Don't change the title or anything else in this dialog box, just hit "Insert into Post."
   d. You can now edit the link just by highlighting at least one of the characters you want to replace, typing the text you want displayed, and deleting unwanted characters.
   e. Check the link after you publish the post to make sure it is working as expected.

   NOTE: If in the post you are working on, you wish to refer to a previously released pdf, it is generally best to link to the post in which that pdf was previously published, rather than the pdf itself. This gives the user more opportunity to understand context, and for our purposes also makes website usage easier to track with our analytics.

9. **To push a post into one of the top three "must read" positions on the home page –**

   a. Under categories (generally set in step #3f) ALSO choose "Must read." This causes the post (assuming its publication date is more recent than any other entry tagged "must read") to be featured in the most prominent spot on the home page. The two next most recent are featured beneath the big one; the third most recent is no longer featured but will still appear elsewhere on the site.
   b. Any post – substantive, blog, or other, can be pushed to the "must read" area.
   c. Do your best to include an image (a graphic, an image from the gallery, or other) in order to keep the home page interesting. (See #10 below.)

10. **To include images in a post** –

    a. Put your cursor where you want the image to appear. (This will generally be at the beginning of the post
    b. Go to the "Upload/Insert" area just above the toolbar, and click on the plain rectangular icon (the first of four icons). This will allow you to either upload a new image from your own computer. Or use the "media library" tab to find and choose any image in the media library. (The "gallery" tab shows recently used images.)
    c. For posts that will be featured in the "Must read" section of the website, if you want an image to show up on the home page, you must add the image separately using the "Featured Image" box at the bottom of the right sidebar. (If you also want the image in the body of the post, be sure to do steps #10a and #10b FIRST.) Click the "Set featured image" link. (Note: the featured image on the home page can differ from the image that appears inside the post.)

i. When the box shows up, you can either upload a new image, or use the "gallery" tab to choose an image you've already put into the post, or the "media library" tab to find and choose any image in the media library.
ii. After uploading or choosing the image, make sure "size" is "Full Size."
iii. Click the "Use as featured image" link, then click the "Save all changes" button at the bottom of that box.
iv. To change the image used on the home page after having done this, simply go back to edit the post and in the "Featured Image" block, click the "Remove featured image" link then use the steps above to set a new one. Make sure to click the blue "Update" button for the post itself after making any changes to a post, including this type of change.

11. **To make your own image from an Excel chart:**
   a. Start with an Excel chart or table. Because the image will be scaled down to fit into a post, it should be simplified as much as possible. For example, text that we would normally put in an axis label could be incorporated into a caption instead. More ideas: http://www.levinsonleeconsulting.com/samples/.
   b. Print to PDF. Or, paste into a Word document as "enhanced metafile" and print that to PDF.
   c. Open the PDF in Adobe Acrobat. Use the "crop" tool (under Tools >Advanced Editing) to select the precise area you want. Double click to perform the crop.
   d. From the main button at the upper left, "Save as." At the bottom of the dialogue box, click the drop-down box and choose JPEG.
   e. Insert into post using instructions in #10 above. For the best resolution, choose "full size." Once the image is in the post, you can drag the corner of the image to make it smaller.

ADMINISTRATOR TIPS

12. **Updates** – DO NOT RUN Wordpress or plug-in UPDATES. They may cause the site to break, and in any case, must be preceded by a comprehensive back-up of server files and SQL database. Lisa Beers of Beers Design runs tailored updates for $75 a session; she recommends updates every 12-18 months.

13. **AAA to be archived –** There are 34 posts in this category. They are "private" and set to draft. Do NOT publish these posts. They are of historical interest only and date from the original content transfer from the old site. All of the items on these pages have been made into individual posts.

14. Do periodically check "**Comments**." You will find spam there, and you will see that we are picked up by some aggregators that don't add much value. (Just move these to the trash.) But you may also find that our work has been mentioned in places that didn't get picked up by Google news.

15. **To create a page that won't be noticed by visitors –**

    Sometimes we want to post things that won't be noticed by most but that a small group can access by knowing the URL. For example, http://fiscalpolicy.org/fpi-internal-news-archive was created in this way.

    a. Create a new page and "publish" it, but UNcheck the box "Include this page in lists of pages" at the bottom of the right sidebar.
    b. Once the page is published you can click the "view page" button just under the title and the new page will open up in your browser. Copy the full URL and send that to the people you want to see the information. The page won't be accessible anywhere in any menu or page of the site, but will be live for people to see that have this link. Search engines won't pick it up since they won't find it when they crawl the site, since there won't be any links to it. This method doesn't require password-protecting (which is also possible), but is an easy way to limit who sees certain content.

16. **To control the order by which the Browse reports displays categories –**

    a. By default, the lists in the widget will display by alphabetical or numerical order.
    b. To reorder them, go to the Dashboard. In the left sidebar under Posts → My Category Order, drag categories to reorder them. When you're done dragging them into the right order, click the blue button at the bottom to apply your order.

17. **To control the box at the top of category topic pages –**

    a. In the left sidebar under Posts → Categories, when you see the list of categories, find the one you want to add/edit the description for and click its title.
    b. You'll see a box for "Description." Type your text into there and when finished, click the "update" button.

18. **To control what pages show in the Navigation Bar –**

    a. Example: to restore the "Blog" link in the navigation bar, go to the "page" named "blog".
    b. In the right sidebar there's a heading "Exclude Pages." Check off the box beneath and then click the "update" button for the post.
    c. To remove from the navigation bar the link to a page, go to that page, go to the right sidebar, UNcheck the box under "Exclude pages," and click "update."

19. To check **Google analytics** … Log in fiscalpolicyinstitute, password fpi12345. Bryan's cell phone number and work email are saved as contact information for this account. Answer to security question is fpi123.

20. To check for **broken links** … http://wordpress.org/extend/plugins/broken-link-checker/.

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