Website User Manual

ICOM – User guidelines for ICOM Mini-websites

This handbook aims to give you the basic keys to developing your mini-website.
The document is designed to be as user-friendly as possible, provides you with step-by-step instructions and gives you all the necessary information about the mini-website functions that you will use.

Some functions are included in the Wordpress interface but have not yet been developed and activated for ICOM mini-websites.

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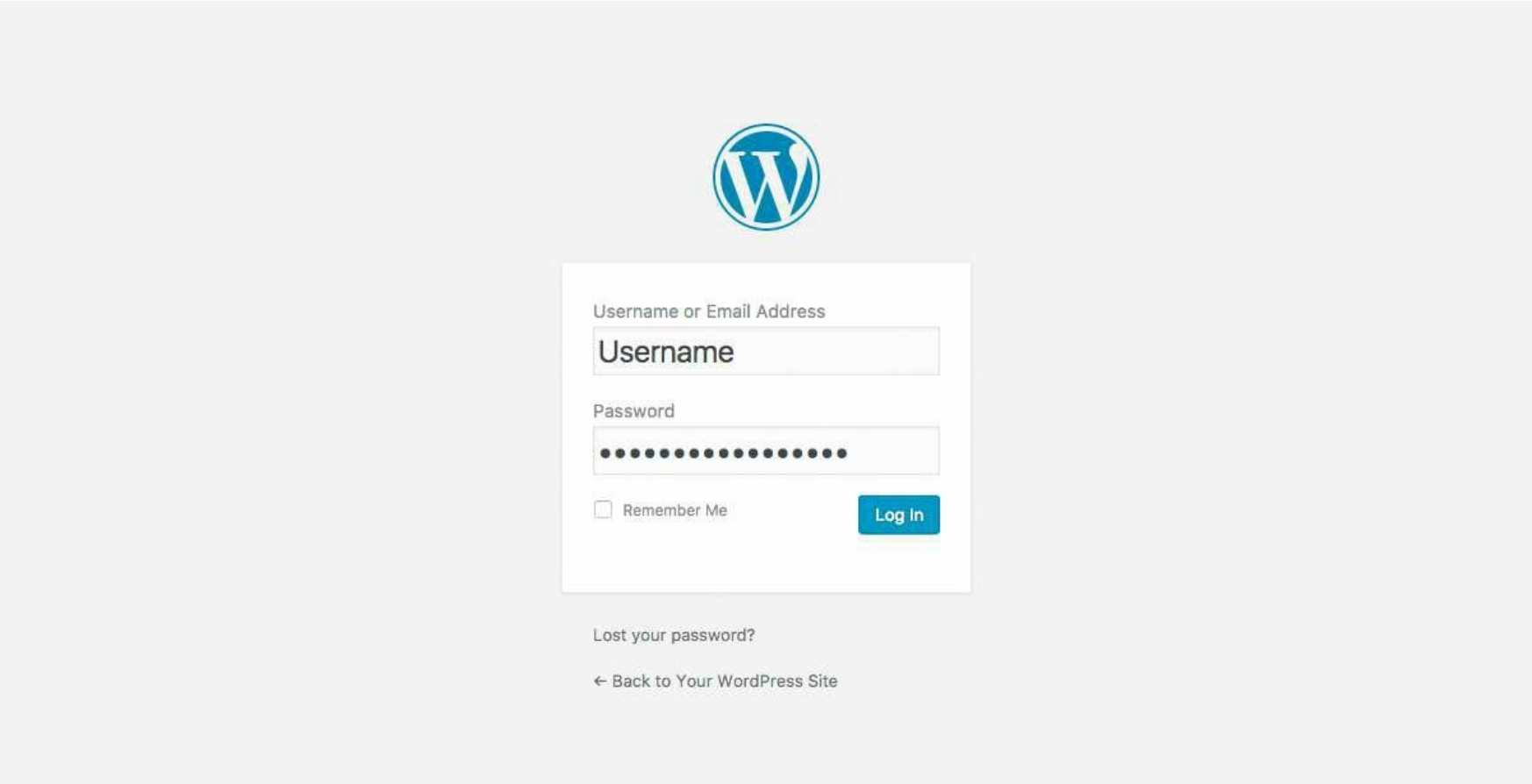
Logging in

The login page for your website can typically be found at the URL *yourwebsite.mini.icom.museum/wp-login.php*
Replace "yourwebsite" with your committee's name (e.g. *ceca.mini.icom.museum/wp-login.php* or *icom-see.mini.icom.museum/wp-login.php*) or *yourwebsite.mini.icom.museum* with your actual domain name.



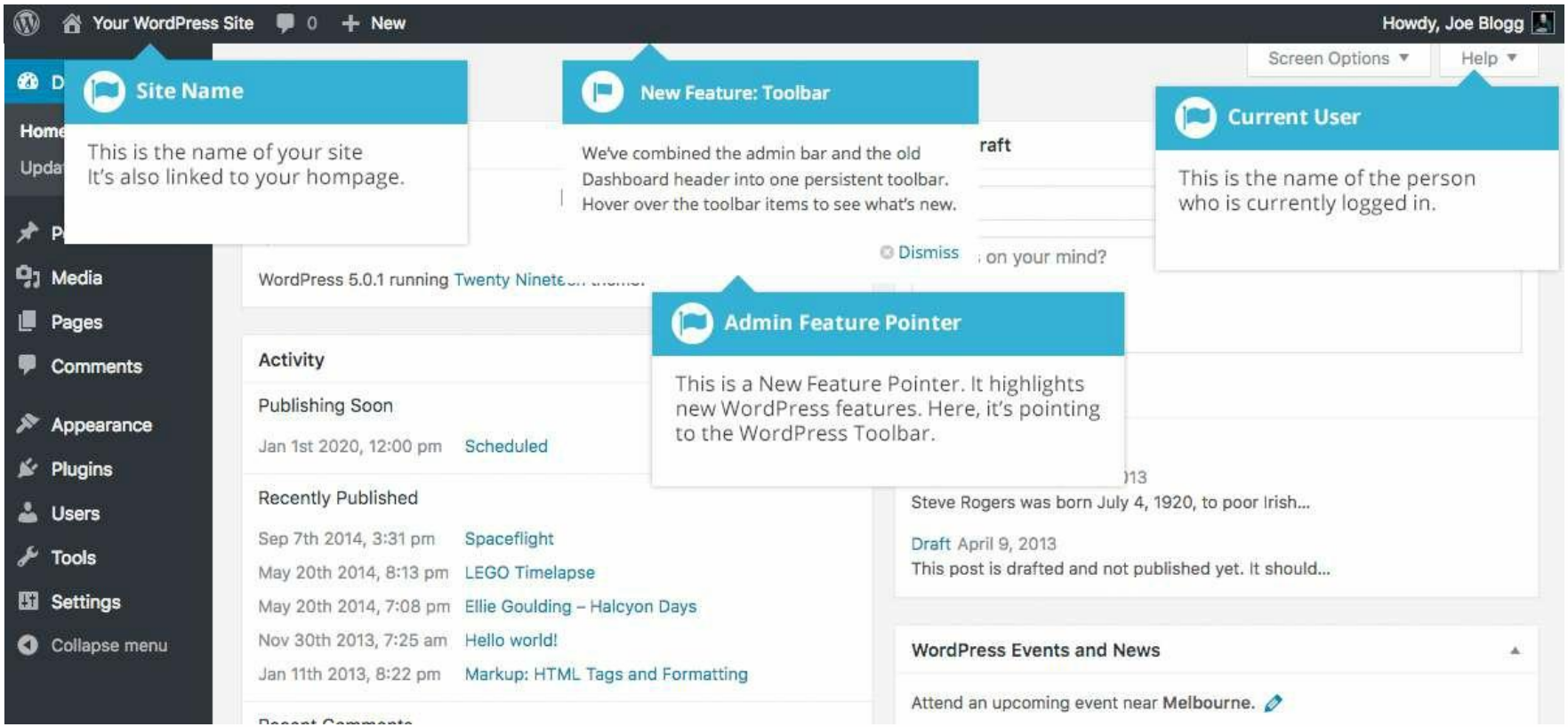
Dashboard

Once you've logged in, the WordPress **dashboard** will appear. This is your main administration homepage. At the top left of the dashboard (in every page) you will see the name of your website in the header area (hyperlinked to your site's homepage).

In the top right corner you will see the name of the person who is currently logged in. Move your cursor over your name to reveal the *Log Out* link as well as a link for editing your **profile**.

The ***Screen Options*** dropdown menu will display various options that allow you to configure what is displayed on the current page. The information in this panel will change depending on the website page that you are currently viewing.

The **flag** in the toolbar is a language selector that determines the website content to be displayed. You can choose items in a specific language or in all languages. To change the WordPress Admin interface language, go to your profile.



Adding Content to your Website

Adding content to your website is easy whether you want to create a news, a page or an event. The procedure for creating all these elements is the same, except for news creation, which also allows you to combine Categories and Tags, whereas you can't on pages or events.

Classic Editor

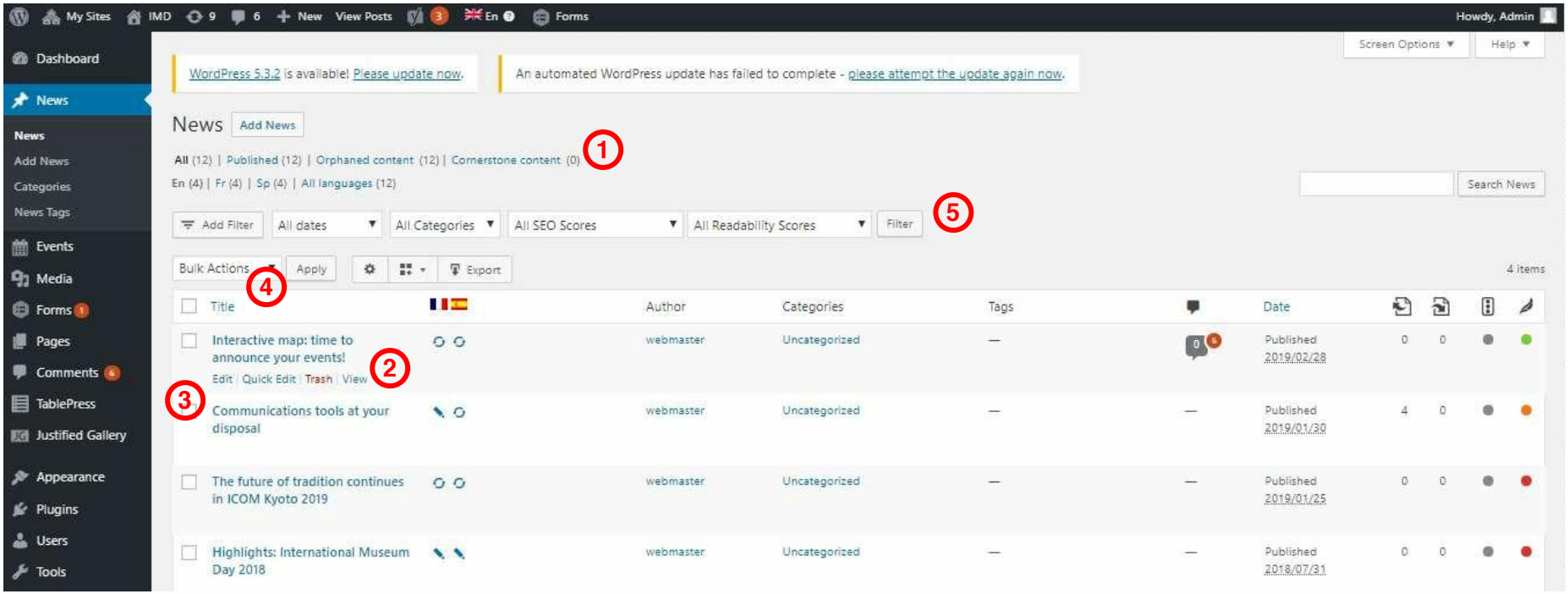
Much like a regular word processor, the editor has toolbar buttons that allow you to bold (B) or italicise (I) text, add headings (Paragraph) or bullet points ( ), links ( ) or change your text color (A). It's also extremely easy to add images and other media to your content using the buttons displayed below.

Click on the Toolbar Toggle ( ) button to display all the text editing options.
The complete toolbar is displayed below.

What is the difference between categories and tags?

Tags are *ad-hoc* keywords that identify important information in your news (names, topics, etc.) that may recur in other news, while categories are pre-determined sections of the website. If you think of your website like a book, categories are like the table of contents and tags are like the terms in the index.

News



If you click on the *News* menu option you will see the list of your website's news posts. The information displayed includes the news title, languages, categories and the date the news was published or is scheduled for publishing. The posts screen will look similar to the screen above.

At the top of the page **(1)** you can see the total number of news posts on your website, how many of them have been published by yourself, and their status, such as Published, Scheduled, Sticky, Pending, in Draft or in the Trash.

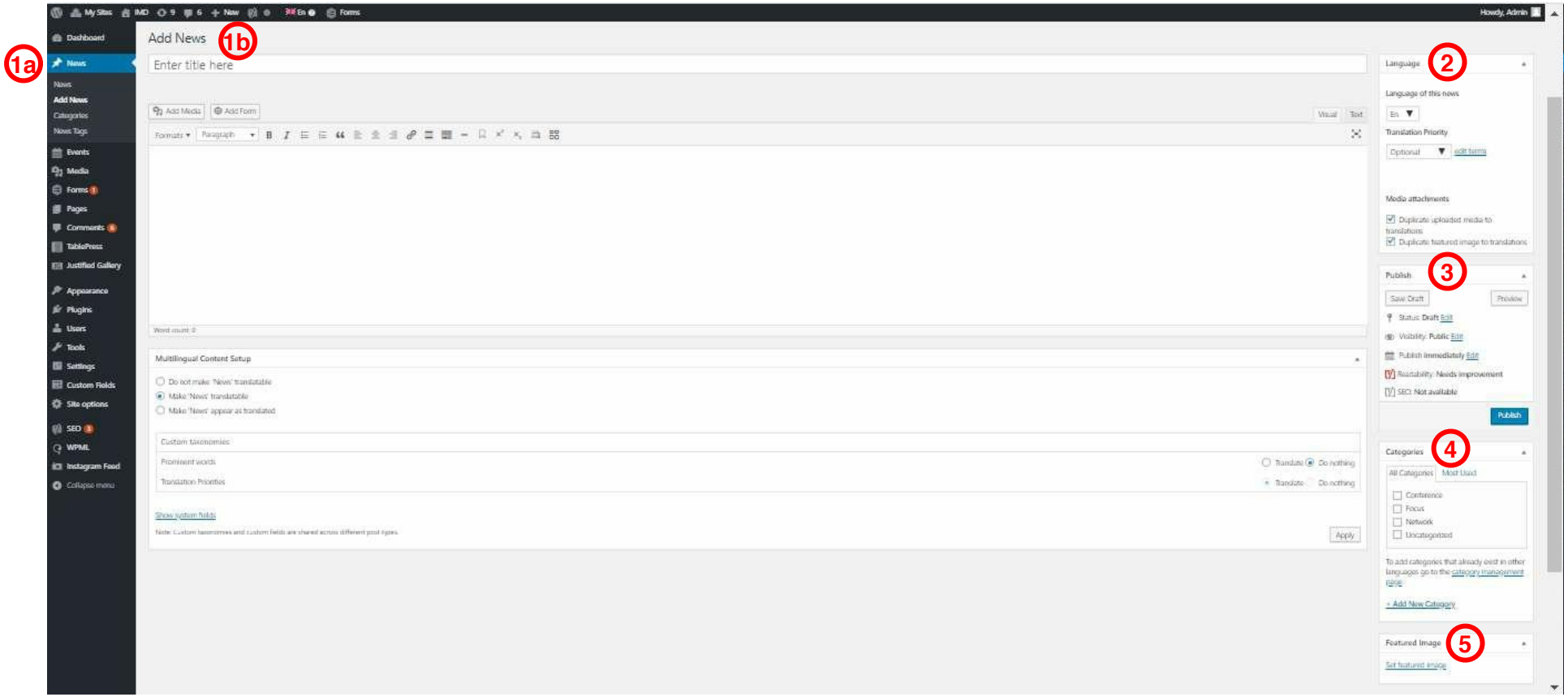
If you hover your cursor over each row **(2)**, four links will appear beneath the news title.

- **Edit** – Will allow you to edit your news. You can also click on the news title to edit your news
- **Quick Edit** – Allows you to edit basic news information such as the title, slug and date, plus a few other options
- **Trash** – Will move the news to the Trash. Once the Trash has been emptied, the page will be deleted
- **View** – Displays the news. If the news hasn't been published yet, the link will read *Preview*

You will find a checkbox next to each news title **(3)**. This allows you to perform an action on multiple items at once. Simply select the news that you would like to perform an action on. From the Bulk Actions dropdown menu **(4)**, select either the *Edit* option or the *Move to Trash* option and then click on the *Apply* button. The *Edit* option will allow you to edit the categories, author, parent and publishing status, add tags and to choose whether or not to allow comments and the status of each of the checked items. The *Move to Trash* option will move the selected items to the Trash. You can also filter the pages that are displayed using the dropdown list and the *Filter* button **(5)**.

Adding News

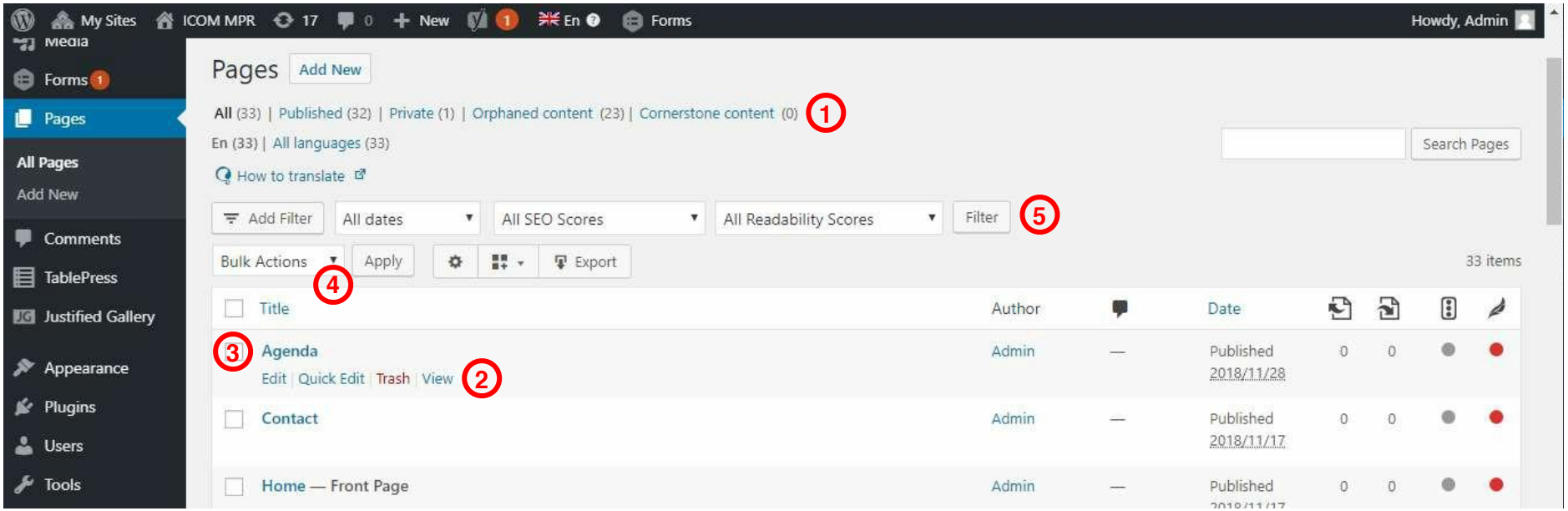
To add a news item, hover over the *News* menu option in the navigation menu on the left-hand side and click on the *Add News* link in the flyout menu **(1a)**. Alternatively, click on the *News* menu option and then click on the *Add News* link underneath, or the *New* button at the top of the page **(1b)**. You will see a page similar to the image below.



On the right-hand side of the screen, you can access the language **(2)** and publication **(3)** options (to manage translations, the visibility of the news and to decide whether to publish it immediately or to schedule it for a later time) as well as the News category (*for example* Conference, Focus, Call for Papers) **(4)** and select a featured image that will appear as preview in the homepage **(5)**. **<u>If no image is added in a news, the committee logo will appear automatically</u>** (cf. *Site Options*).

Pages

If you click on the *Pages* menu option you will see a list of your website's pages. The information displayed will include the title of the page, the name of the author, the number of comments and either the date when it was published or the date when the page was last modified. The pages screen will look similar to the screen below.



At the top of the screen you can see the total number of pages in your website, the number of pages that you have published yourself and how many have been published or drafted **(1)**.

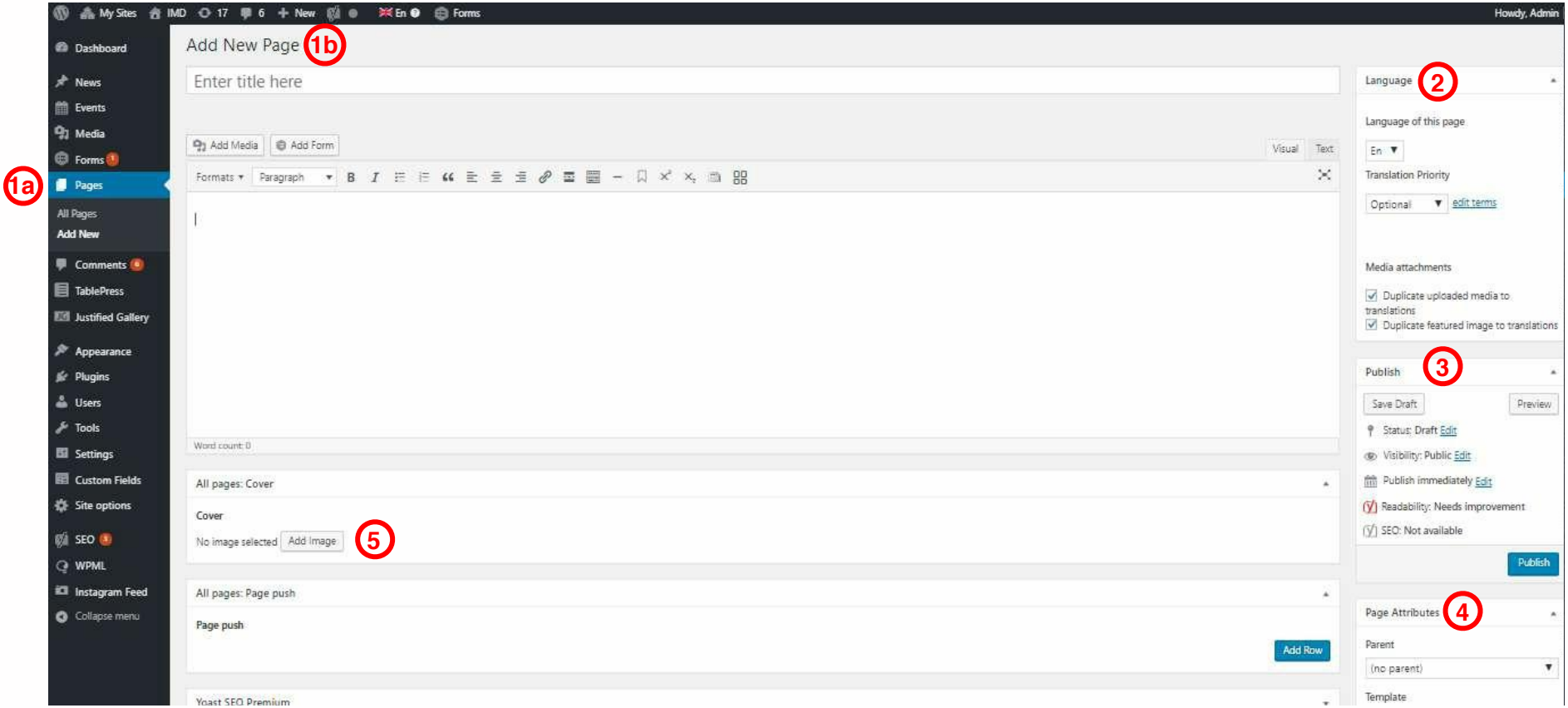
If you hover your cursor over each row, a few links will appear beneath the page title **(2)**.

- **Edit** – Will allow you to edit your page. You can also click on the page title to edit the page.
- **Quick Edit** – Allows you to edit basic page information such as the title, slug and date, plus a few other options
- **Trash** – Will move the page to the Trash. Once the Trash has been emptied, the page will be deleted
- **View** – Displays the page. If the page hasn't been published yet, the link will read *Preview*

You will find a checkbox next to each news title **(3)**. This allows you to perform an action on multiple items at once. Simply select the news that you would like to perform an action on. From the Bulk Actions dropdown menu **(4)**, select either the *Edit* option or the *Move to Trash* option and then click on the *Apply* button. The *Edit* option will allow you to edit the author, parent and template, and to choose whether or not to allow comments and the status of each of the checked items. The *Move to Trash* option will move the selected items to the Trash.
You can also filter the pages that are displayed using the dropdown list and the *Filter* button **(5)**.

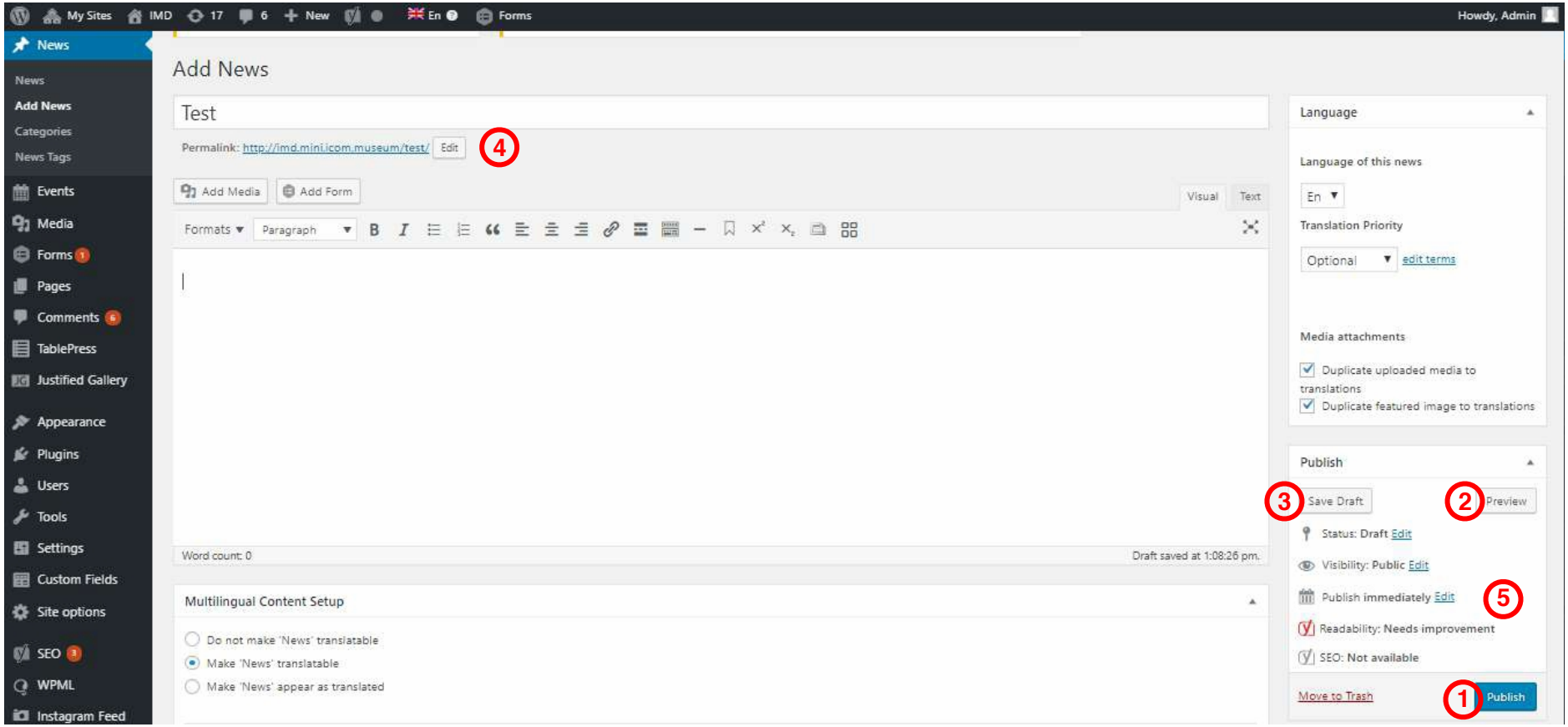
Adding a New Page

To add a new Page, hover over the *Pages* menu option in the navigation menu on the left-hand side and click on the *Add Page* link in the flyout menu **(1a)**. Alternatively, click on the *Pages* menu option and then click on the *Add Page* link underneath, or the *New* button at the top of the page **(1b)**. You will see a page similar to the image below.



On the right-hand side of the screen, you can access the language **(2)** and publication **(3)** options (to manage translations, the visibility of the page and to decide whether to publish it immediately or to schedule it for a later time) as well as the Page Attributes (to decide where the Page will appear in the website main menu) **(4)** and select a cover image that will appear in the header **(5)**. If no image is chosen, a default image will be displayed (cf. *Site Options*).

Saving and Publishing Content (News or Pages)



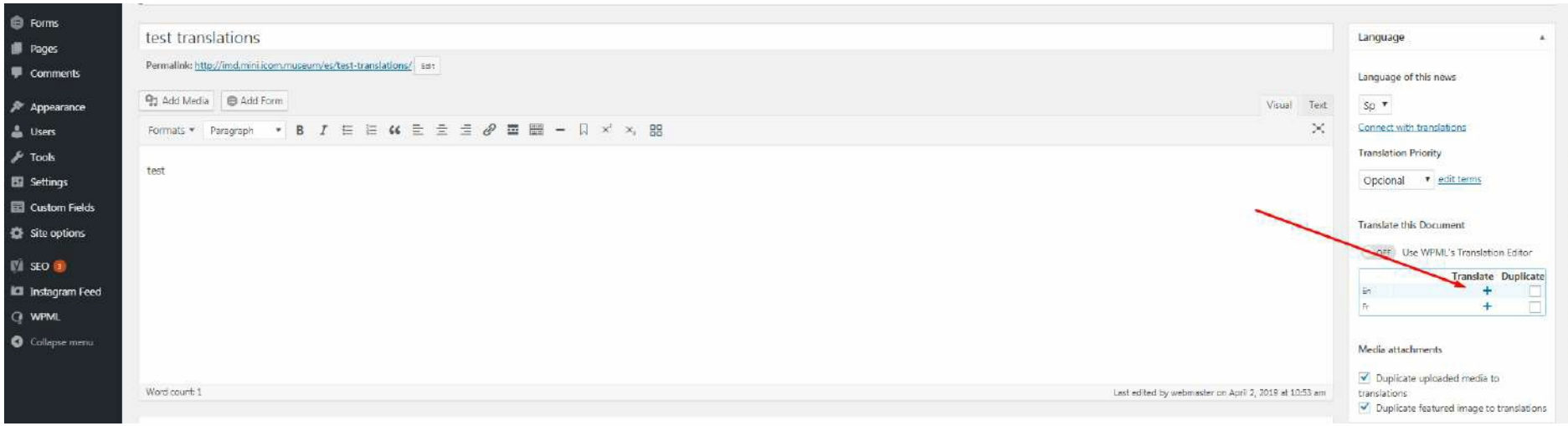
Once you have added all your content to your news or page, you can save it as a draft or publish it.
Clicking the *Publish* button **(1)** will save your page/news and publish it on your website.
Clicking the *Preview* button **(2)** will show you a preview of the current page/news.
Clicking the *Save Draft* button **(3)** will simply save the news/page, not publish it. This will be useful if you want to return to it at a later date and add more content, or if you are just not yet ready to publish it.

You will find the full URL of your page or news just below the title of your content **(4)**. Clicking on this URL will take you to the published page, or if the page hasn't been published yet, to a preview of the page. Clicking the *Edit* button next to the URL allows you to change the permalink (i.e. the URL) for the page or news. A specific permalink may improve the ranking of your page or news in search engines and make it easier to find (SEO or Search Engine Optimization). In most cases, however, it's better to simply keep the default URL automatically generated by WordPress based on the title of your page or news.

By default, when you click on the *Publish* button, your page or news will immediately be published. To change this, click on the *Edit* link just to the right of *Publish immediately* in the *Publish* panel **(5)**. You can then select the date and time when you would like to schedule your page or news for publication. You must also click on the *Publish* button when you have updated the date and time fields to ensure publication at the desired date and time.

Translation

You can translate your page/news into another language very simply. After saving the changes in the language that you are currently using, click on the "+" button for the language into which you wish to translate your page/news. You will be redirected to the page/news in the corresponding language. Unfortunately, it is currently not possible to publish a News or Page in multiple languages at the same time, therefore you will have to repeat the procedure described above also for the other languages.



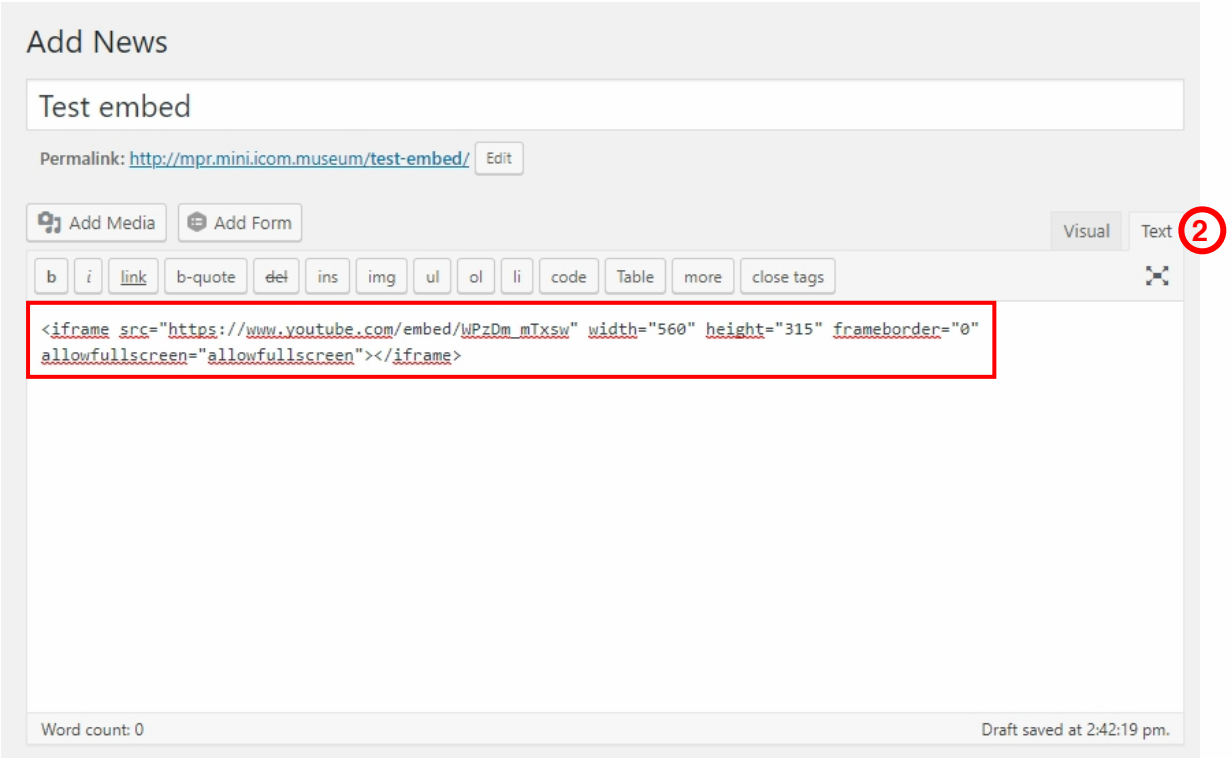
Embeds

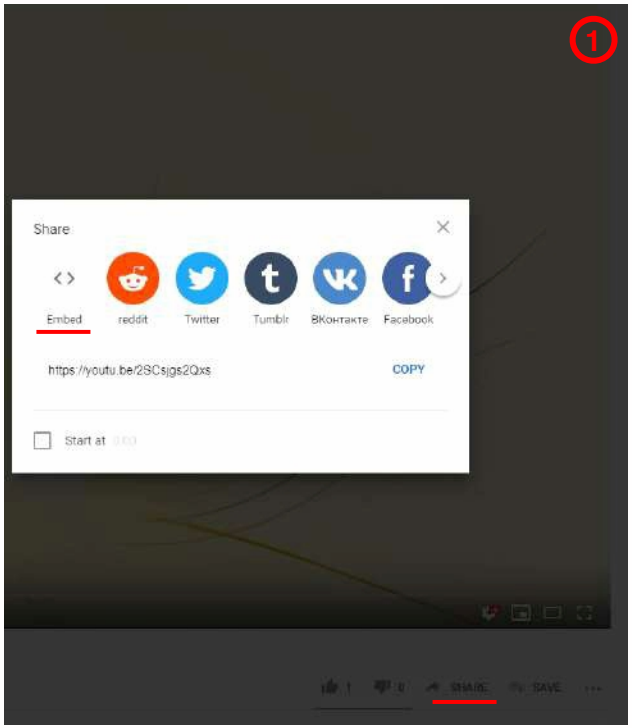
If you want to add more content to your page (*e.g.* a YouTube video, an Instagram post, an Issuu publication) you can also embed it. You don't need to upload a file to your site in order to embed it. You basically just need to create a link to the original content.

WordPress is able to automatically embed files from various hosting platform, just by copying the URL of the content in the News/Page editor.

If Wordpress is unable to embed automatically, you can use the html editor. First direct your web browser to the original content you wish to embed. Click on the "share" button followed by the "embed" button, as shown in the YouTube video example below **(1)**. Copy the code from the popup window. Then go back to Wordpress, click on the "Text" tab **(2)** in the top right corner of the editor and paste the code.

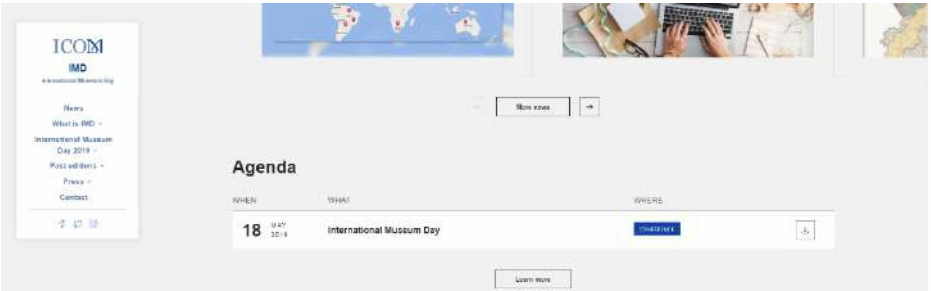
Once you go back to "Visual" mode, the embedded content will appear. You can use the "width" and "height" parameters to modify its size.



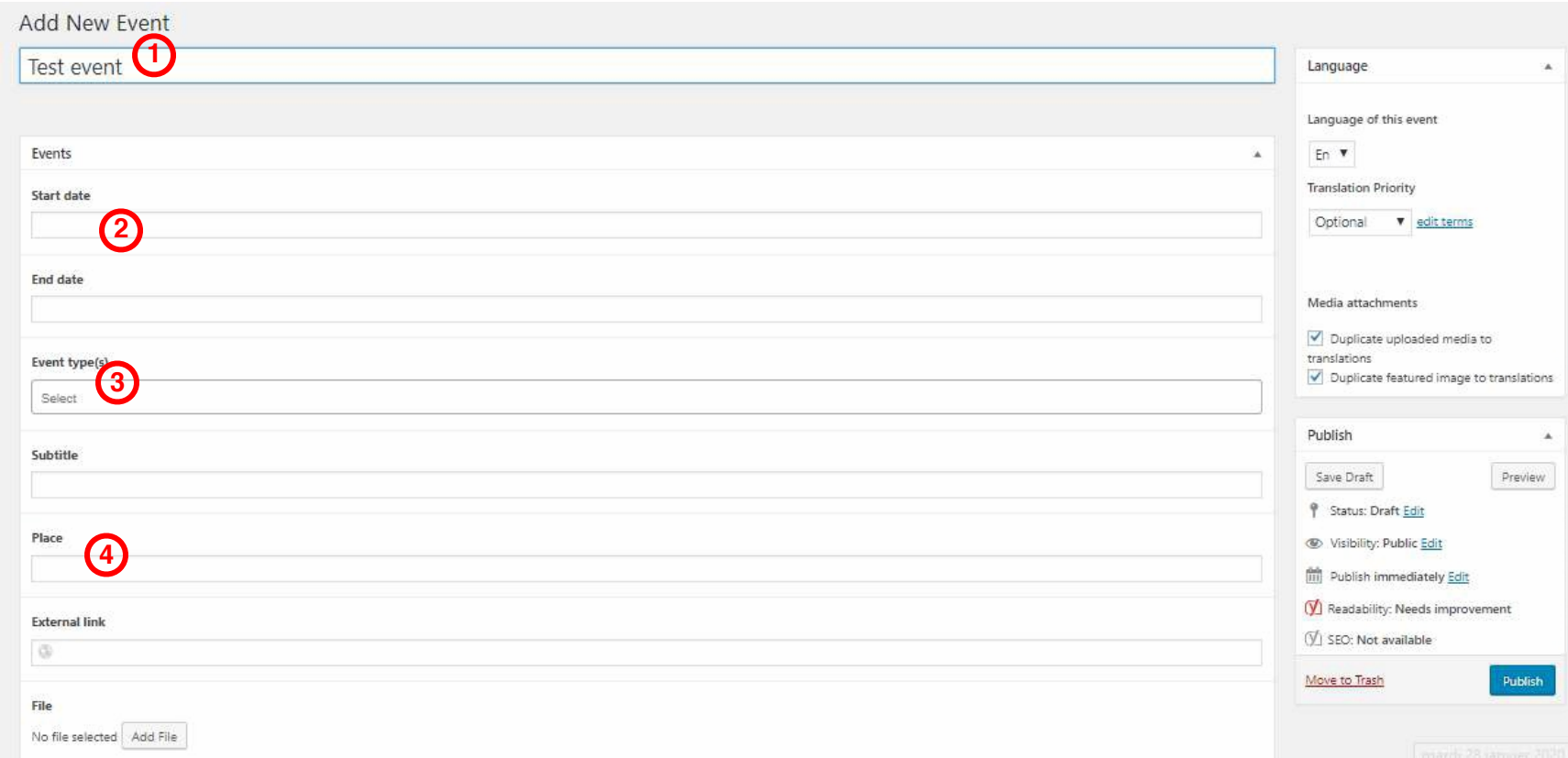


Agenda: add events

If you add an event, it will appear in the agenda section of your website. To add an event, hover over the *Event* menu on the left and click on the *Add News* link in the flyout menu. Alternatively, click on the *News* menu option and then click on the *Add News* link underneath, or the *New* button at the top of the page.

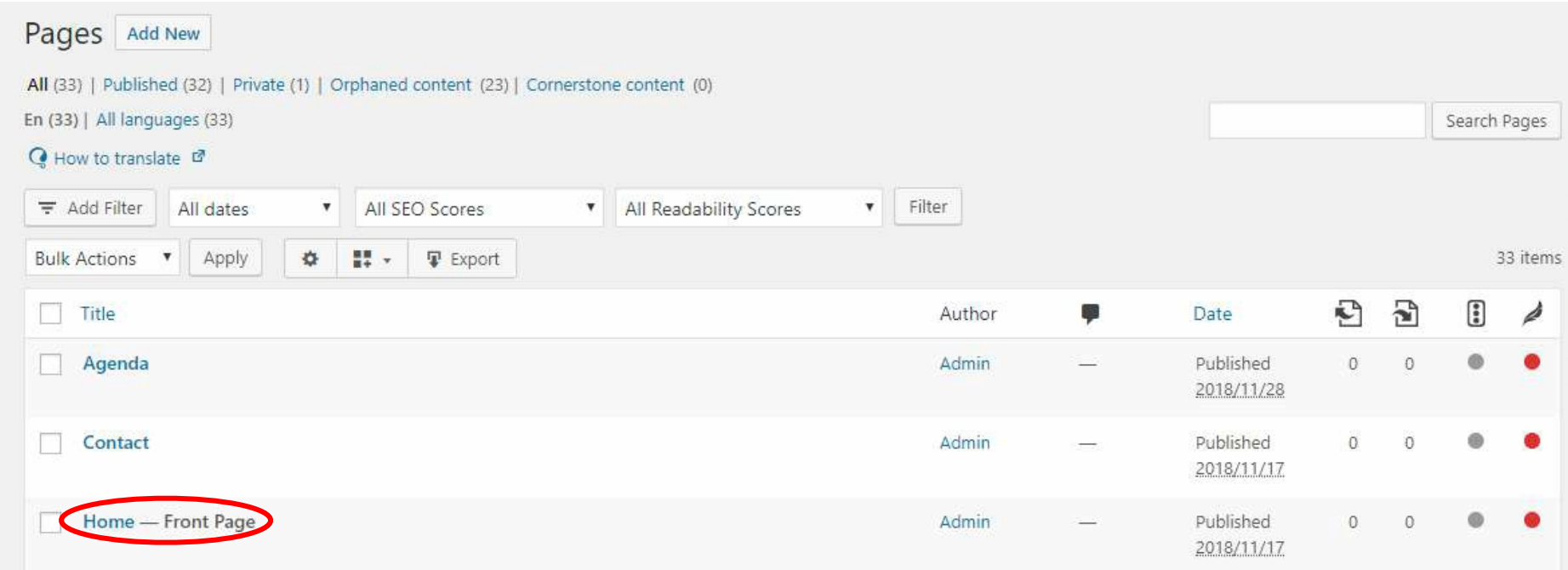


It is very easy to add an event. Add a title **(1)**, a date **(2)**, an event type **(3)**, a place **(4)** and, if necessary, a link, a document, and so on. Then click on "publish" to display the translation options. The event will automatically be removed from the homepage when it is over.

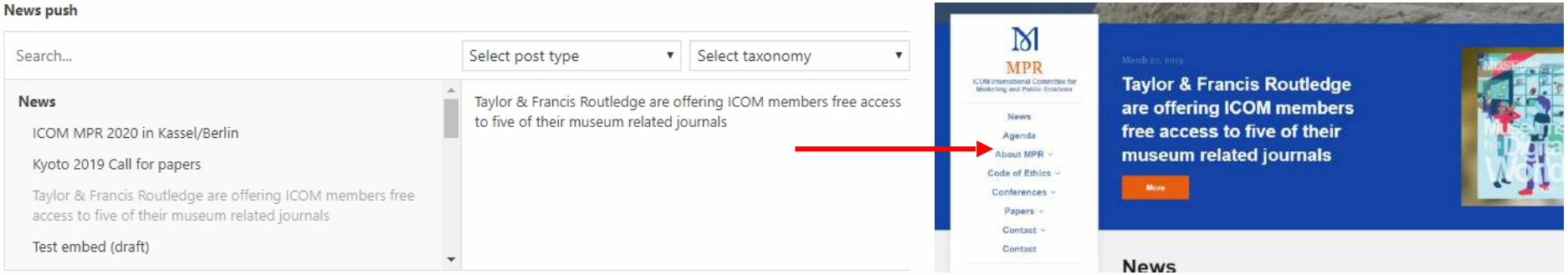


Homepage

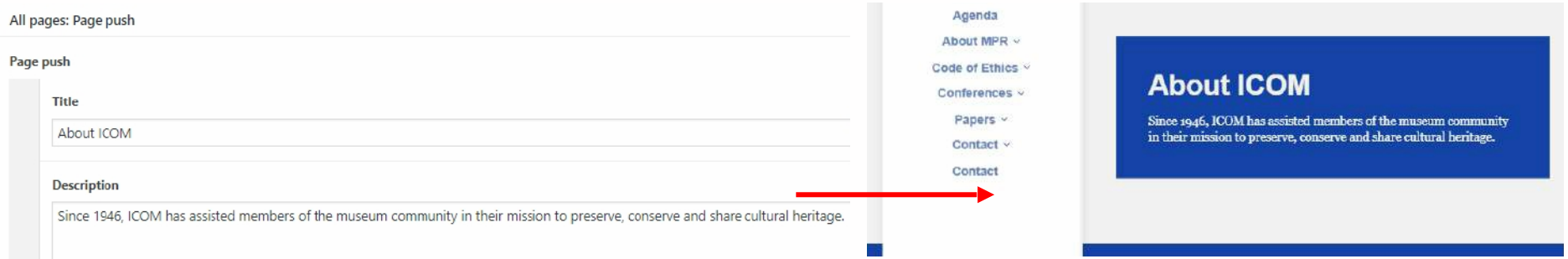
To manage the homepage, modify the page named “Home - Front Page” in the Pages menu.



On the homepage, you can highlight a news in the "**News push**" section by clicking on the news that you wish to promote (one at a time). The pushed News will appear on top of the website homepage.



You can also apply an internal or external "**Page push**", that is a link to a specific page.
This will appear as a button at the bottom of the homepage (red, blue or yellow).



In this example, we created a link (shown as a blue button) to the *About us* page of the ICOM main website, with a short description of the content of the landing page.

Image Gallery or Instagram Feed

You can add an image gallery (top image) OR an Instagram feed (bottom image) at the bottom of the homepage.

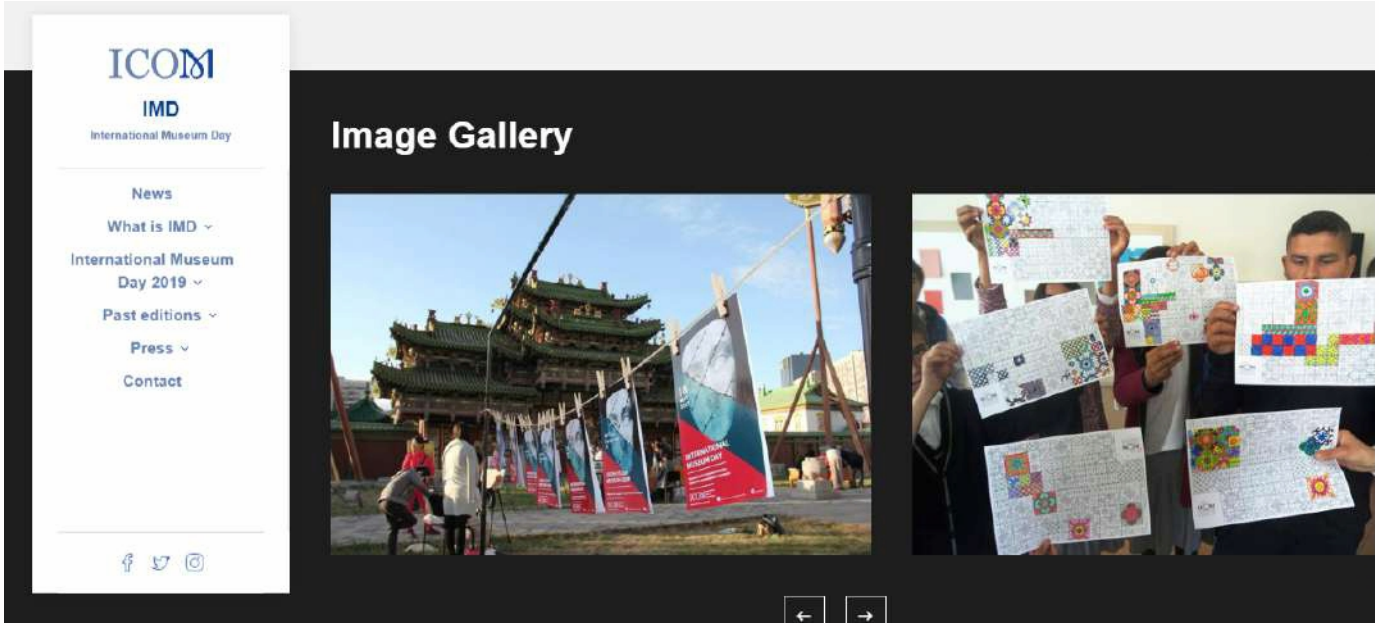
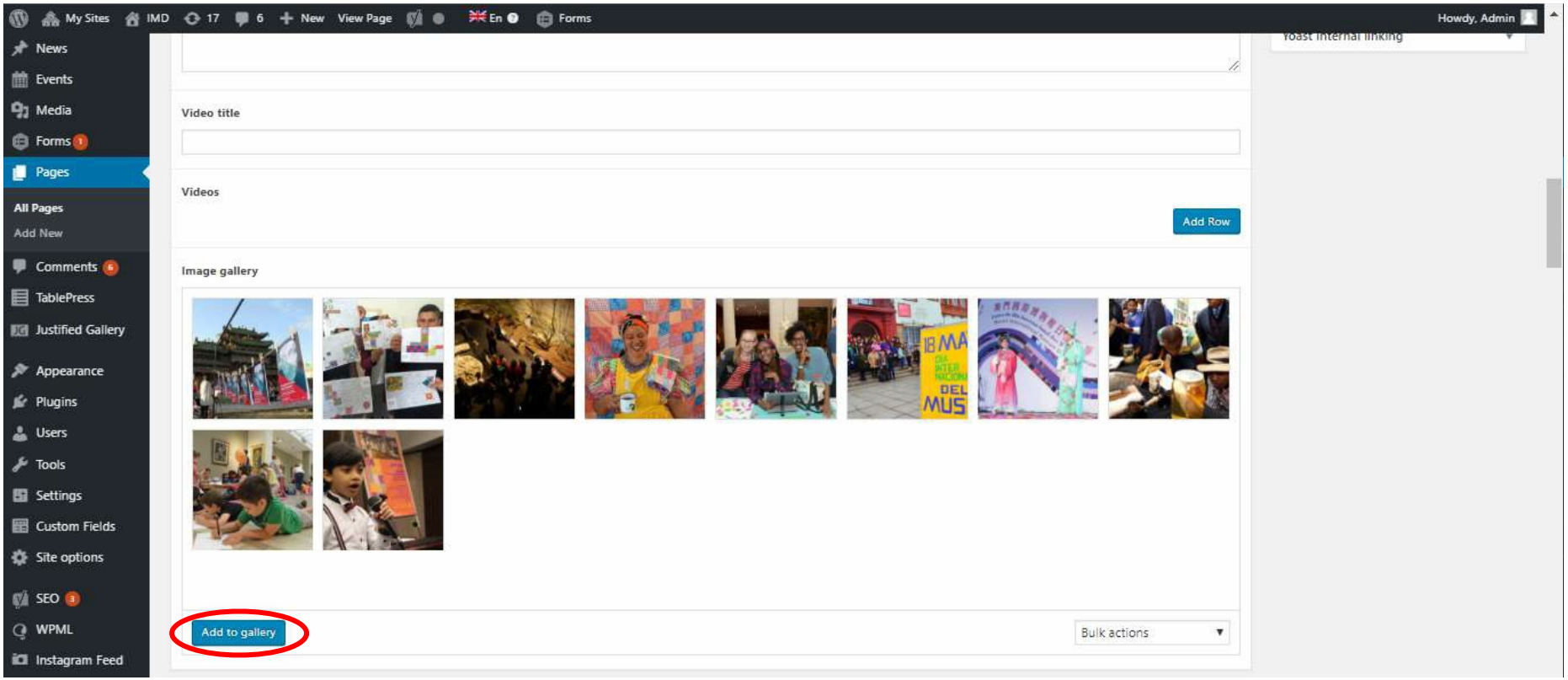


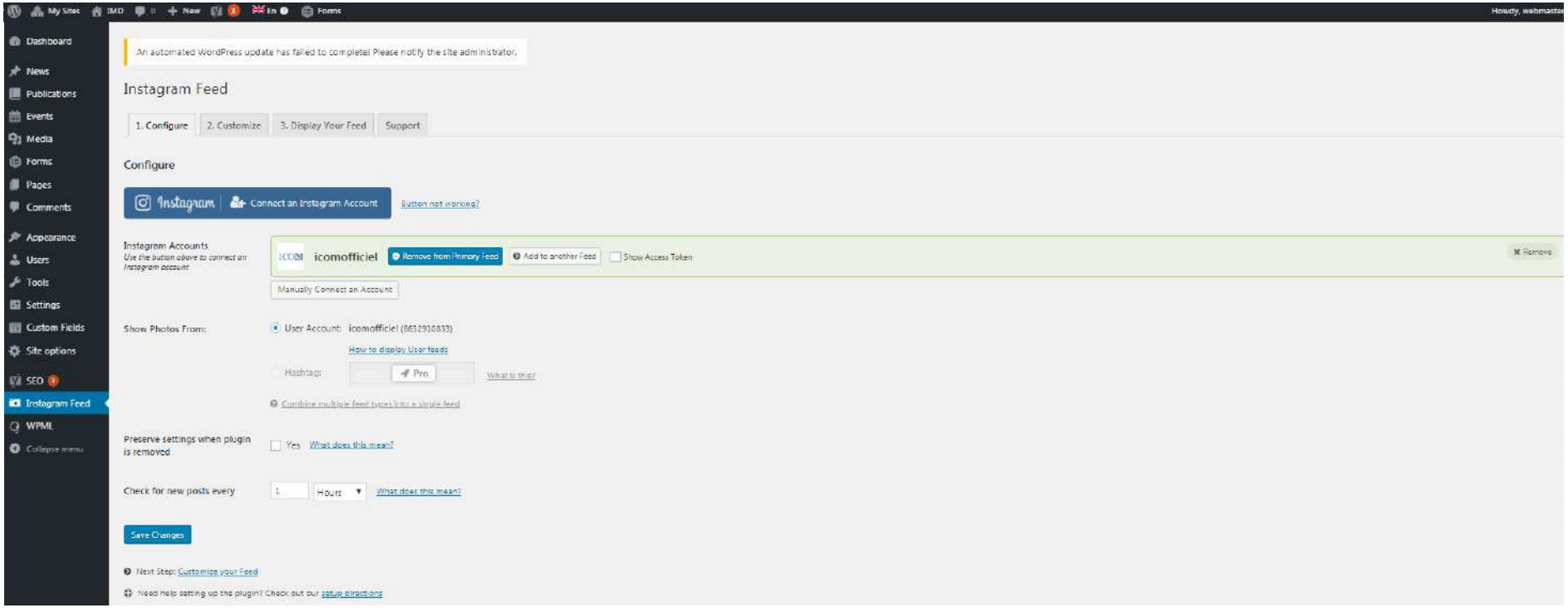
Image Gallery

To modify the image gallery, you must modify the “Homepage”. Click on “Add to gallery” to directly access images and add them.



Instagram Feed

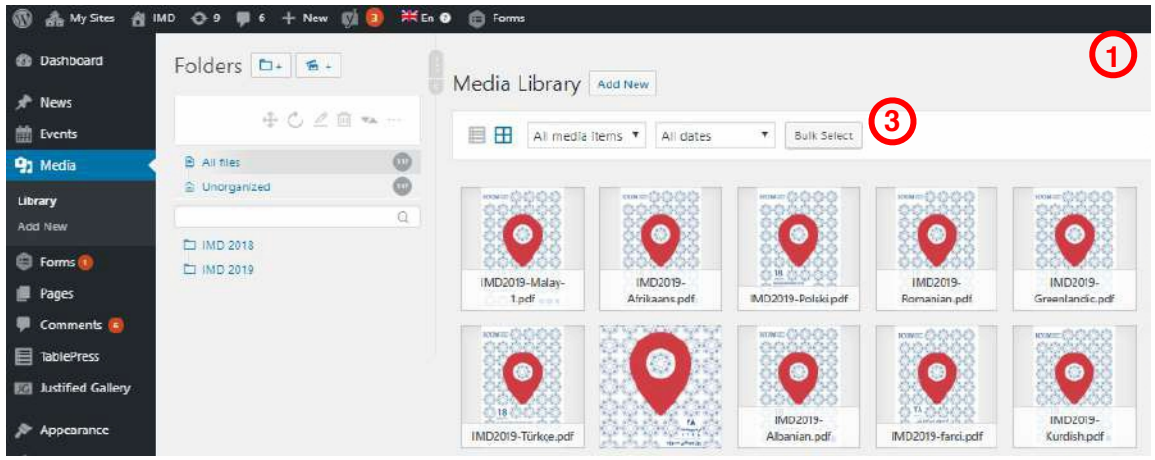
You can choose to display your Instagram Feed rather than an image gallery (which we advise you to do). To connect your account click on *Instagram Feed* in the navigation menu on the left-hand side and follow the instructions there.



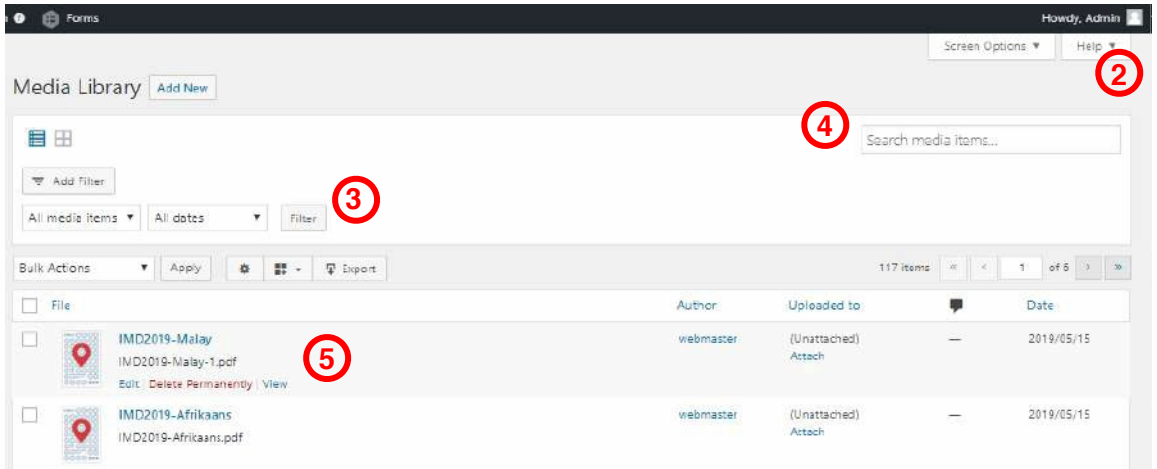
Media Library

The Media Library is where you can find all the uploaded files. **The size of the files uploaded must not exceed 1 MB.**

You can select two types of display mode for your media library: click on the *Grid View* icon ( ) to view your images arranged in a grid **(1)**, or on the *List View* icon ( ) to display your images as a list **(2)**. Both display modes show the most recent files first. There are also several dropdown lists that allow you to filter the files according to specific criteria **(3)**, and a search field to help you search for specific files **(4)**.



The grid view will display a grid of thumbnail images for each of your media files. The grid view uses infinite scrolling, rather than displaying your images on several pages. To view more images, simply scroll to the bottom of the page and more thumbnails will automatically be loaded.



The list view will display your images vertically on several pages. It will display 20 images per page by default, but you can change this number by clicking on the *Screen Options* link at the top-right of the page and changing the *Number of items per page*.

The list of files contains a small thumbnail of each image or file, the title and the filename. If you hover your cursor over each row in list view, a few links will appear beneath the filename **(5)**.

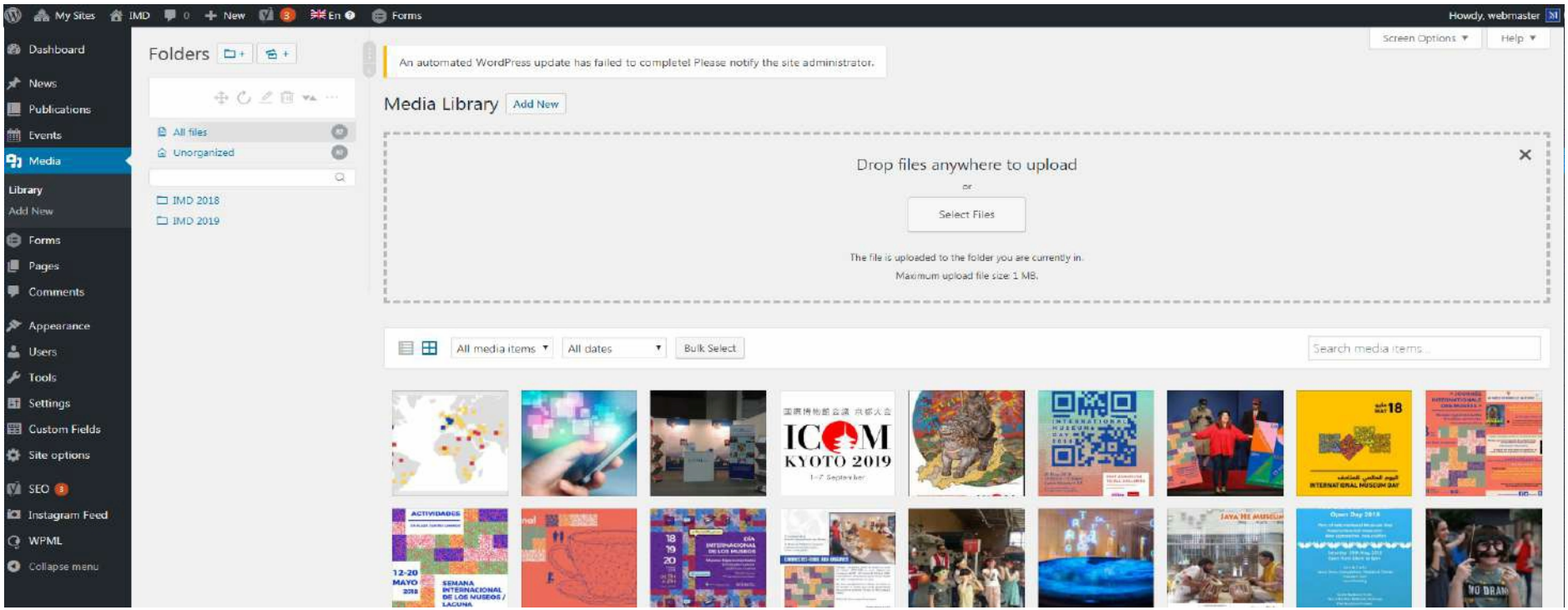
- **Edit** – Allows you to edit properties such as the title, alt text, caption and description. You can also make some basic adjustments.
- **Delete Permanently** – Will delete the file permanently from the Media Library
- **View** – Will display the file on a separate page

Adding a File to the Media Library

To add a new file to the Media Library, click on the *Add New* link in the navigation menu on the left-hand side or the *New* button at the top of the page.

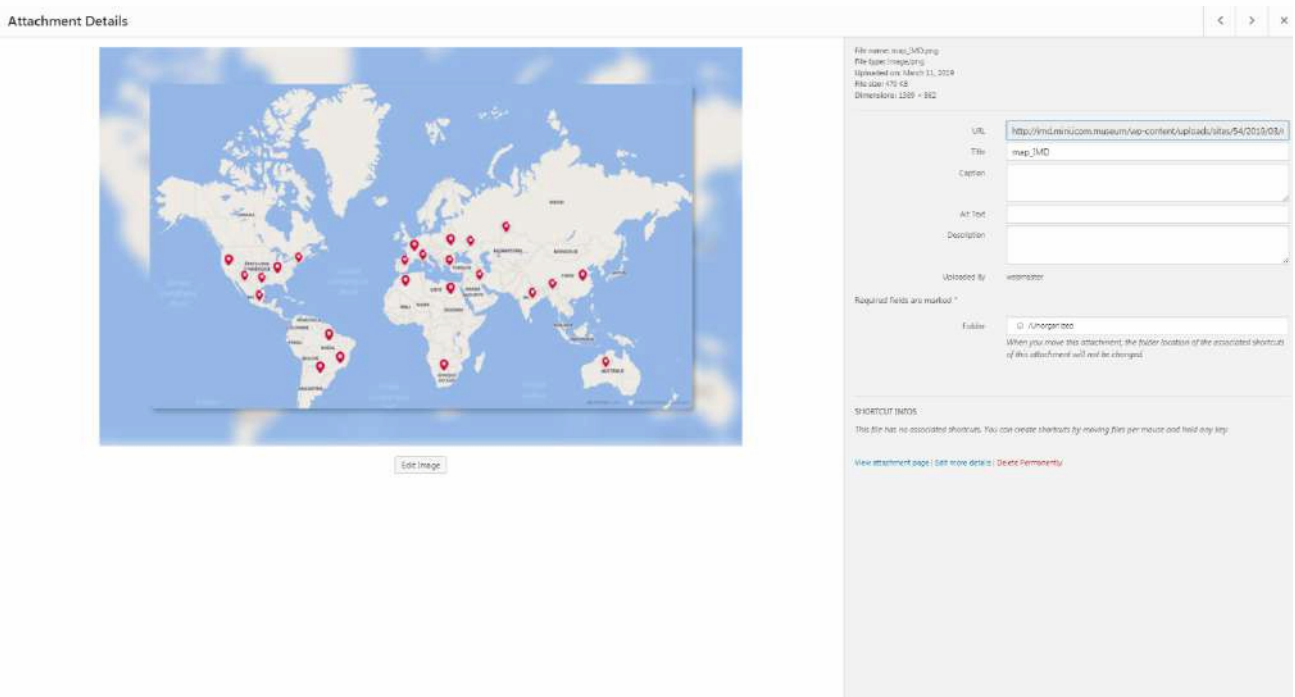
After clicking on the *Add New* button while viewing the Media Library in *List View*, or clicking on the *Add New* link in the menu, simply drag your images from wherever they are on your computer into the area marked *Drop files anywhere to upload*. Your file(s) will be automatically uploaded.

Once your images or files have been uploaded they will be listed in the Media Library. If you wish to edit the file properties, click on the *Edit* link next to the file.



Viewing a File in the Media Library

If you are using *Grid View*, click on a thumbnail and a pop-up window will present the properties for that particular file, and allow you to update certain properties. If the file is an image, you will also see a larger version of that image. For other types of file, such as PDFs or Word documents, you will see a link showing you the URL, which will be linked to the actual file in its turn.



If you are using *List View* you can click on the thumbnail image or the media file title, or you can hover the cursor over the row and click on the *Edit* link. The file properties will be displayed, allowing you to update them.

Editing File Properties

If using *Grid View*, simply click on one of your media files and a window displaying the file's properties will pop-up
Your changes will be automatically saved after each field has been updated. You can use the arrow buttons at the top of the pop-up window to navigate to the previous or next image. Click on the 'x' at the top-right of the pop-up window to return to the Media Library.

To edit the properties of an existing file in *List View*, hover the cursor over the row containing the file that you wish to edit and click on the *Edit* link. After you have clicked on *Edit*, the relevant properties of the media file will be displayed, including the title, URL, filename, file type and, in the case of an image, the file dimensions.

Editing an Image

WordPress has a basic image editing tool that allows you to make some simple adjustments to your uploaded images. You can rotate and flip your images as well as scaling and cropping them to different sizes.
To edit the properties of an image (as opposed to other file types like documents or PDFs), click on the *Edit Image* button just below the image to display the image editing tools.
If you click on the *Edit Image* button in *Grid View*, the image editing tools will appear in the pop-up window.
You'll find the following image editing buttons just above the image:

	Crop – Click on the image and drag the selection box to the detailed display of the image that you wish to crop. Click on the crop button to resize your image
	Rotate counter-clockwise – Rotate the image 90° counter-clockwise
	Rotate clockwise – Rotate the image 90° clockwise
	Flip vertically – Flip the image vertically
	Flip horizontally – Flip the image horizontally
	Undo – Undo the last change
	Redo – Redo the last change

Deleting a File from the Media Library

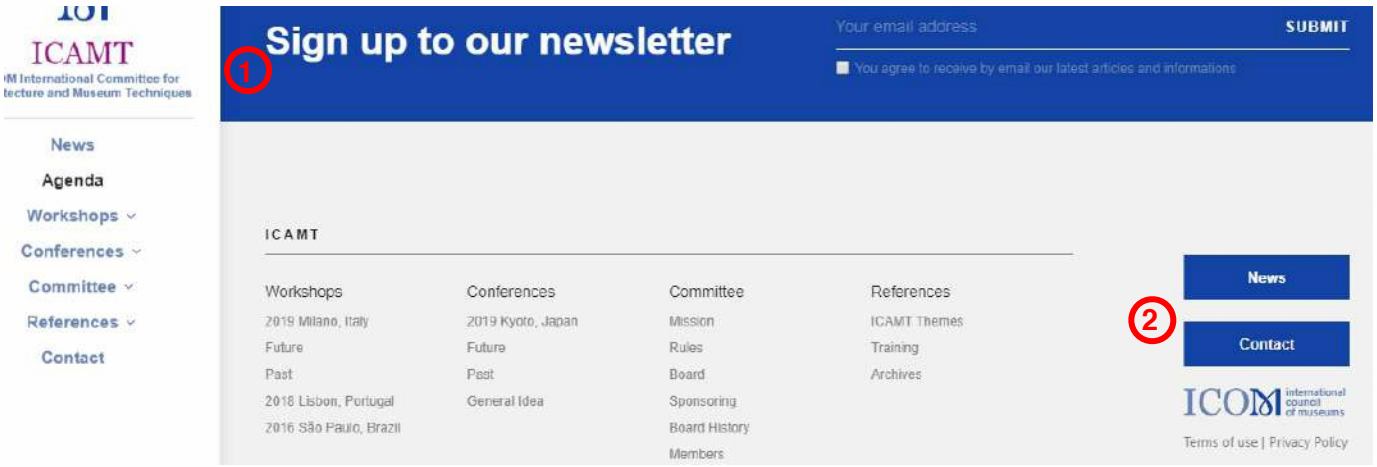
To delete a file from the Media Library in *Grid View*, first click on an image to view the file properties, then click on the *Delete Permanently* button in the pop-up window.

To delete a file from the Media Library in *List View*, click on the *Delete Permanently* button that appears beneath the filename when you hover your cursor over each row.

You will be asked to confirm after clicking on the *Delete Permanently* button in either view.
Click on the *OK* button to delete the file or click on the *Cancel* button to return to the Media Library.

Forms

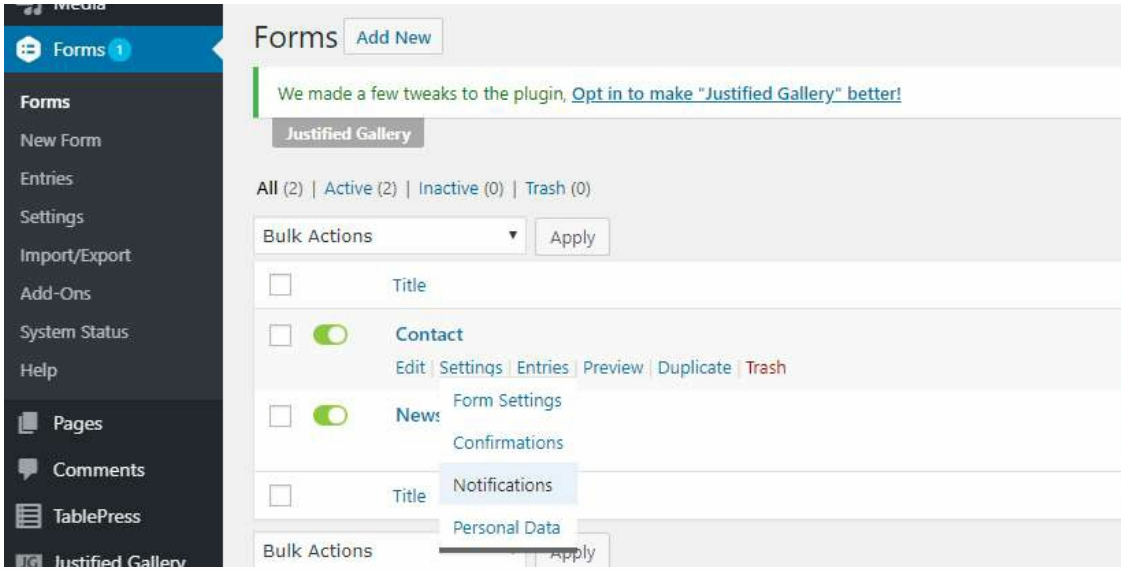
In the *Forms* menu you can create or edit online forms that allow your website users to interact with you. By default, there are two forms implemented on your site, the *Contact form* and the *Newsletter form*. They both appear in the footer of your website.



Newsletter Form (1) – it allows visitors to subscribe to your newsletter

Contact Form (2) – it allows visitors to leave you a message

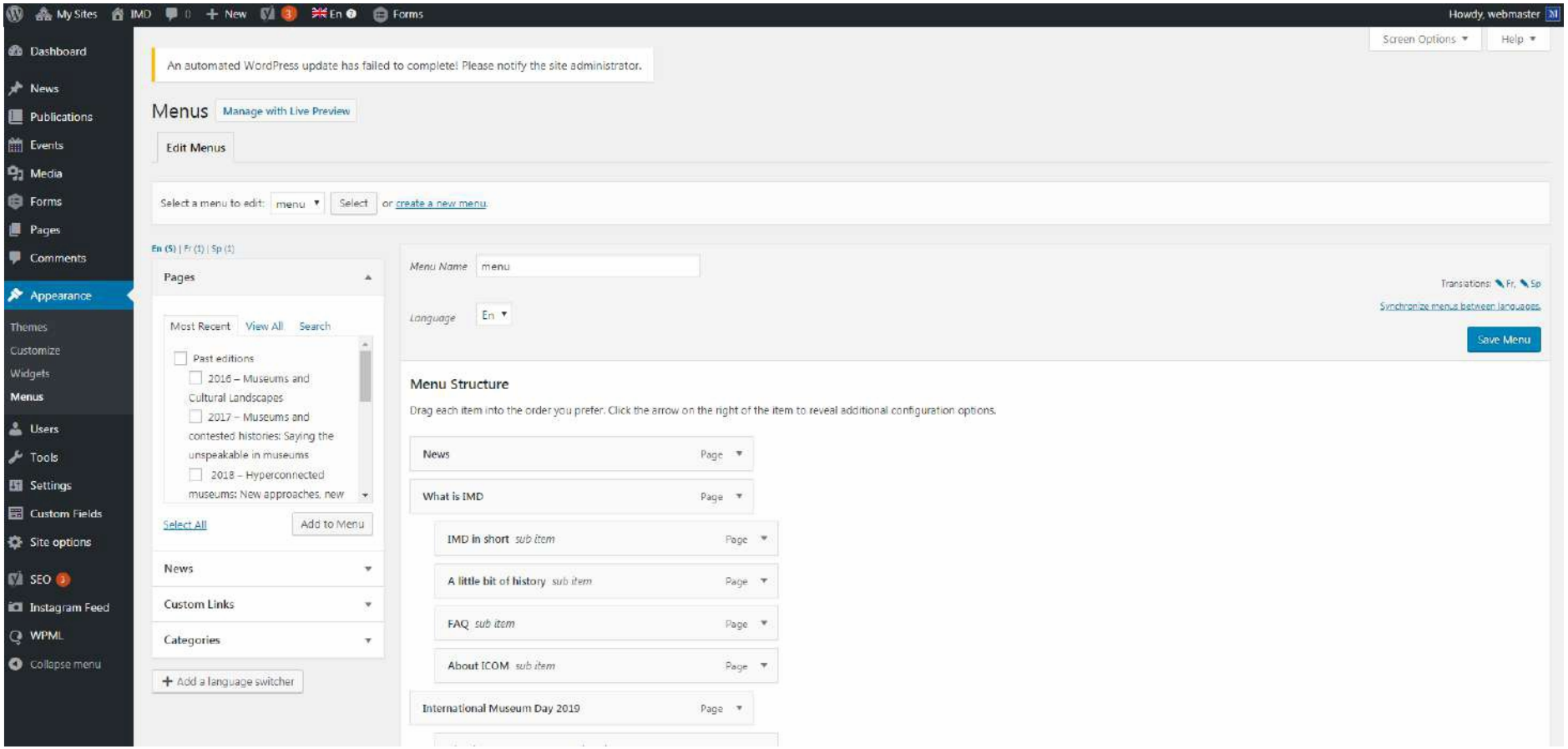
<u>Please note that these forms are not automatic.</u> When someone submits and email or a message, they will be stored in your CMS. You will find all the emails and the messages in the *Entries* section of the *Forms* menu



To be sure not to miss your user entries, you can set a notification that will be sent to an email address of your choice. Go to *Forms* > *Forms* > *Settings* > *Notifications* and then click on *Admin Notifications* > *Edit* to select an email address and modify the message that you will receive.

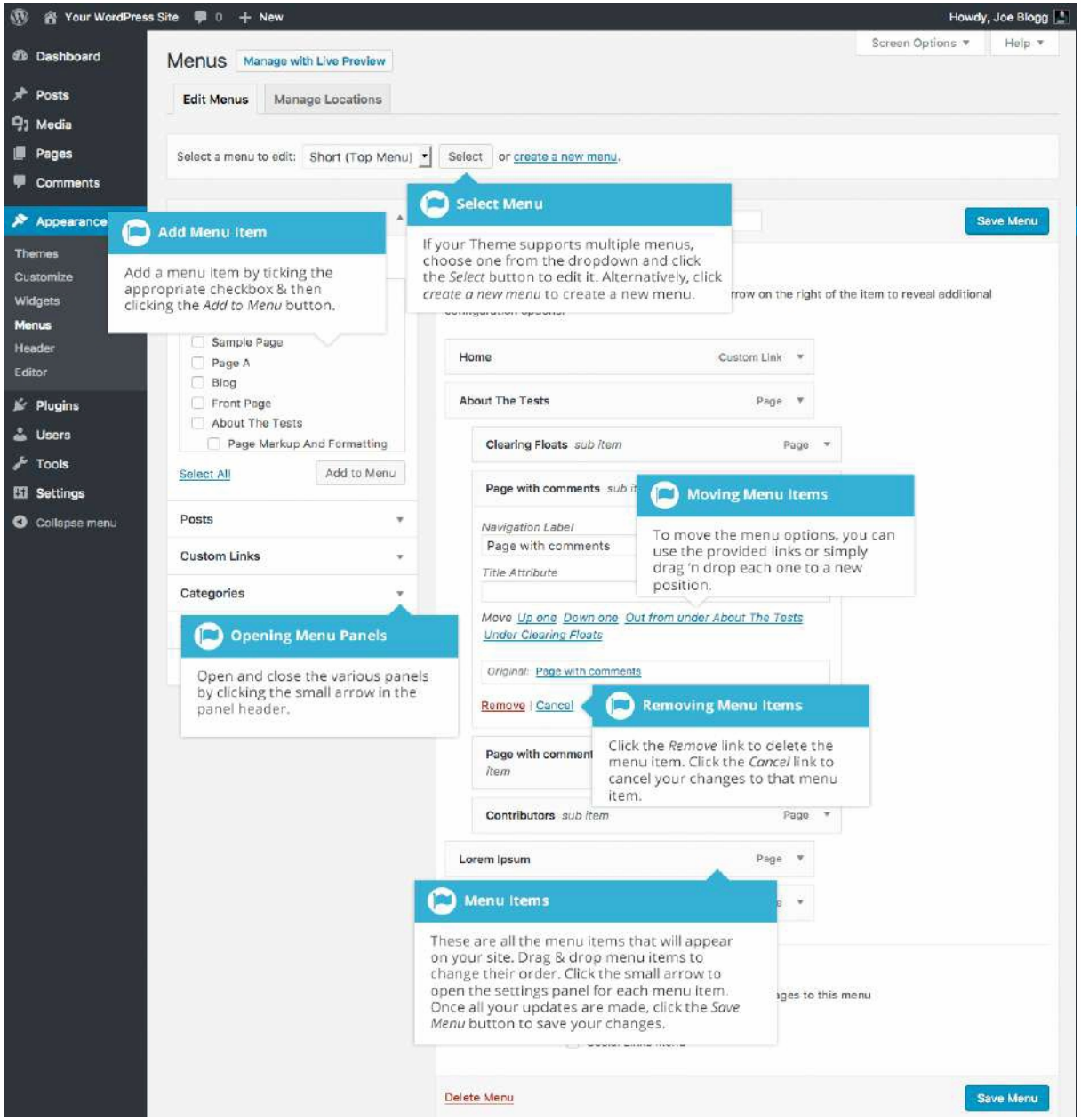
Appearance

The various appearance menus allow you to change how your website looks.



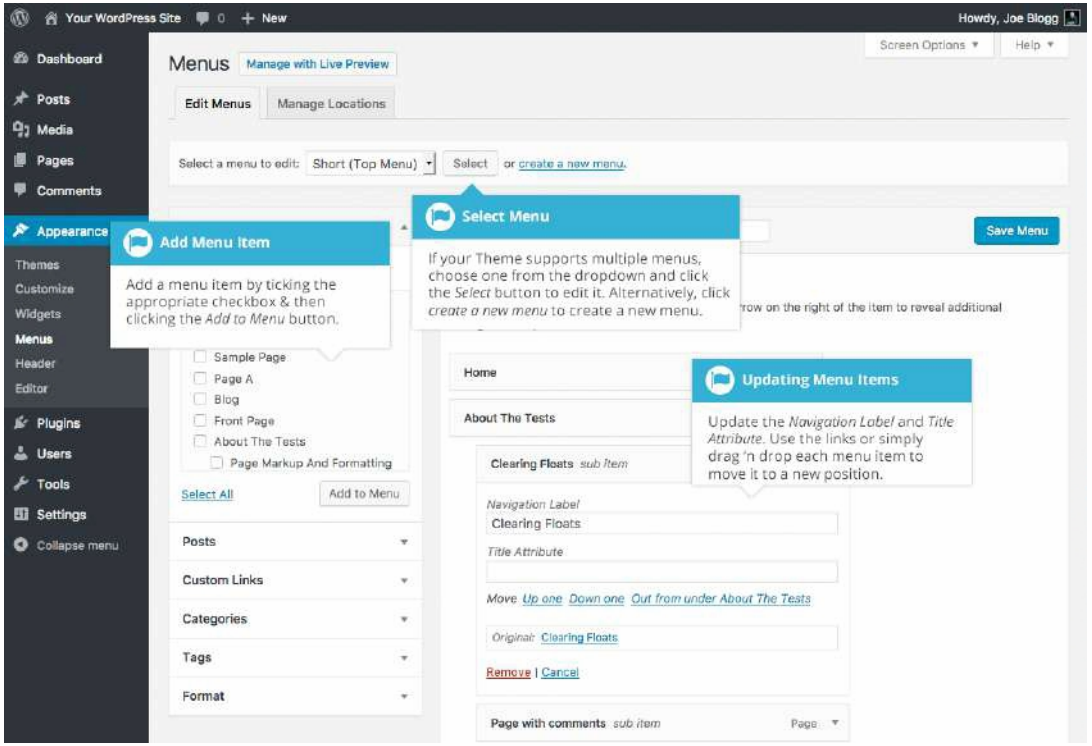
Updating Menus ("Appearance" sub-menu)

Menus can contain links to pages, news, categories, custom links or other content types.



Editing an Existing Menu Item

The up-to-date list of menu items is displayed in the right-hand column of the *Menus* screen. If there are several menus on your website, a dropdown list will be displayed at the top of the page that you can use to select the menu that you would like to edit. Simply select the menu that you would like to edit from the *Select a menu to edit* dropdown list and then click on the *Select* button. The menu items in your selected menu will then be displayed.

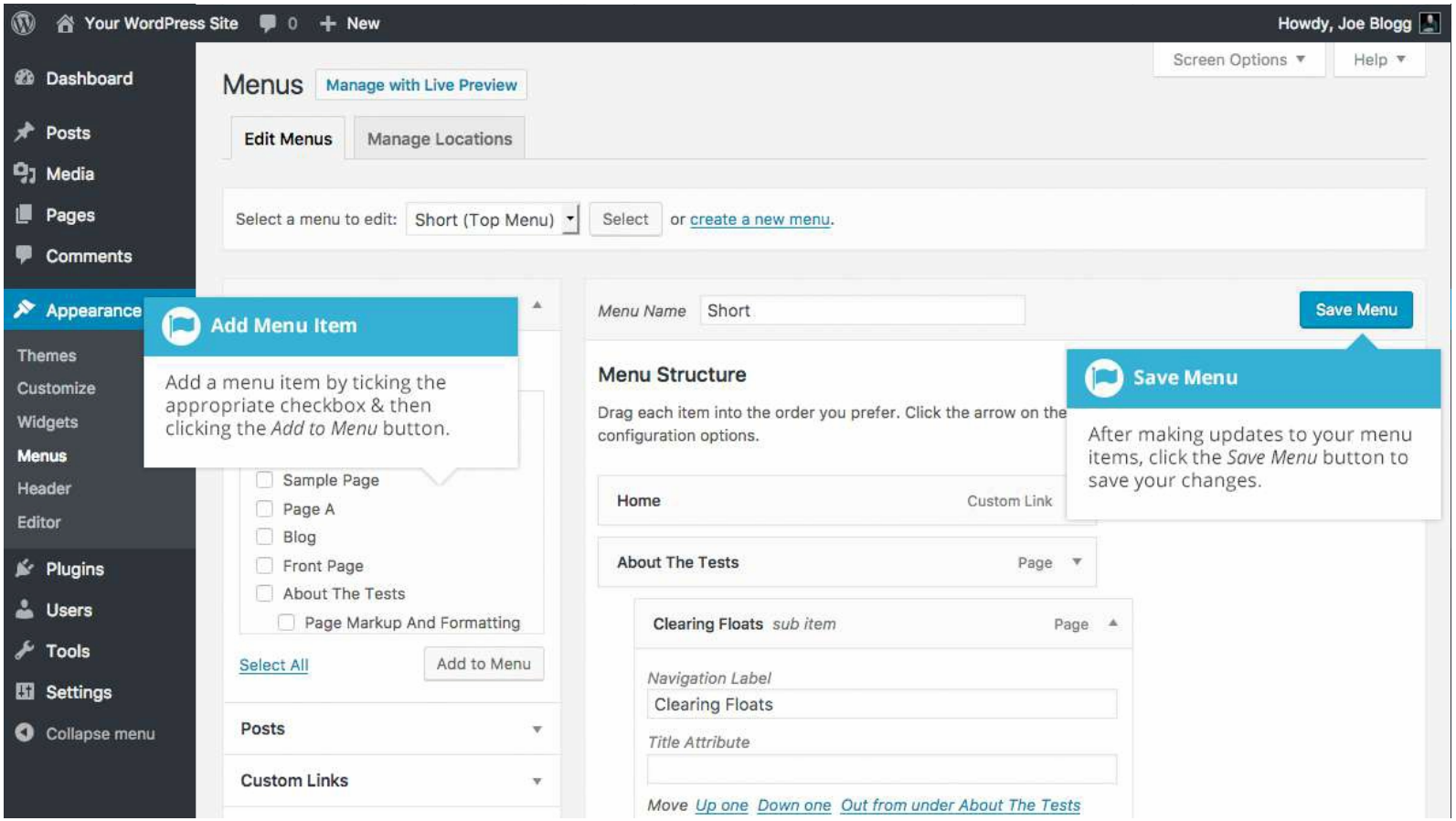


The items in the right-hand column of the *Menus* page will be the menu items that appear on your website. Clicking on the down arrow next to each menu item name will display an options panel for that particular menu item. The options panel will offer the chance to update several items.

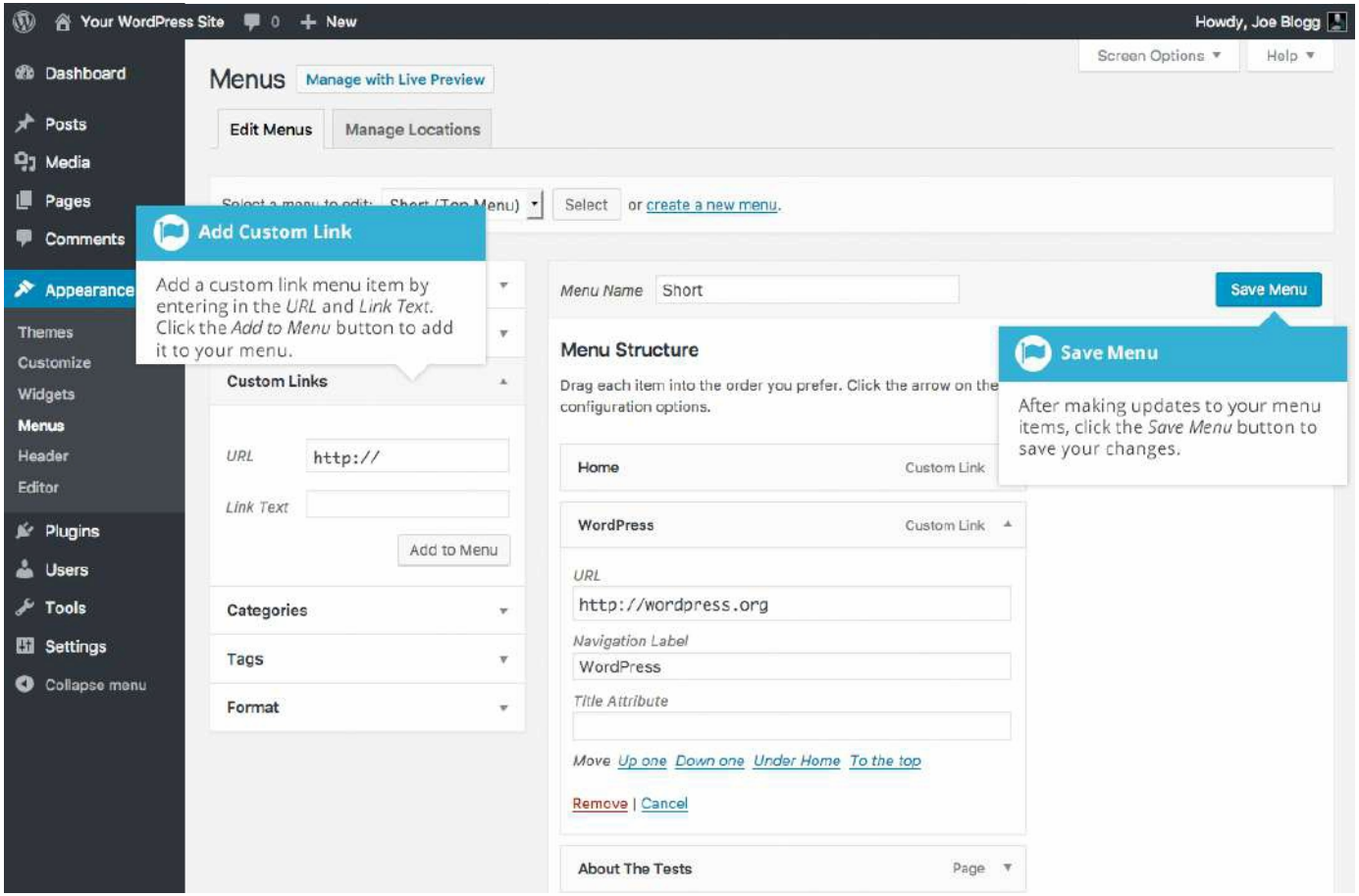
Adding a New Menu Item

To add a new page as a menu item, tick the checkboxes in the *Pages* panel next to each of the pages that you want to add. You can select one page at a time or multiple pages. After selecting your pages, click on the *Add to Menu* button. The new menu items will be added to the current list of menu items. The menu item's name will be the default name of the page. If you want to change this, simply click on the down arrow next to the menu item's name to display the options panel and then update the *Navigation Label* to your preferred name. After making your updates, click on the *Save Menu* button at the top or bottom of the screen. The steps for adding news, a news format, category or tag as a menu item are exactly the same as for adding a page.

Only the pages, custom links and categories panels will be displayed by default. If you wish to add news, tags or news formats as menu items, just use the *Screen Options* tab at the top-right of the screen to enable these panels as well.



To change the order in which the menu options appear, simply place your cursor over the title area of the menu item that you wish to move. When the cursor has changed to a four-pointed arrow, click on and drag the menu item to its new place. It is even possible to create the multi-level hierarchy required for dropdown menus, depending on how your menu is configured within your theme. When you have finished moving your menu items around, don't forget to click on the *Save Menu* button at the top or bottom of the screen to save your changes.



Deleting a Menu Item

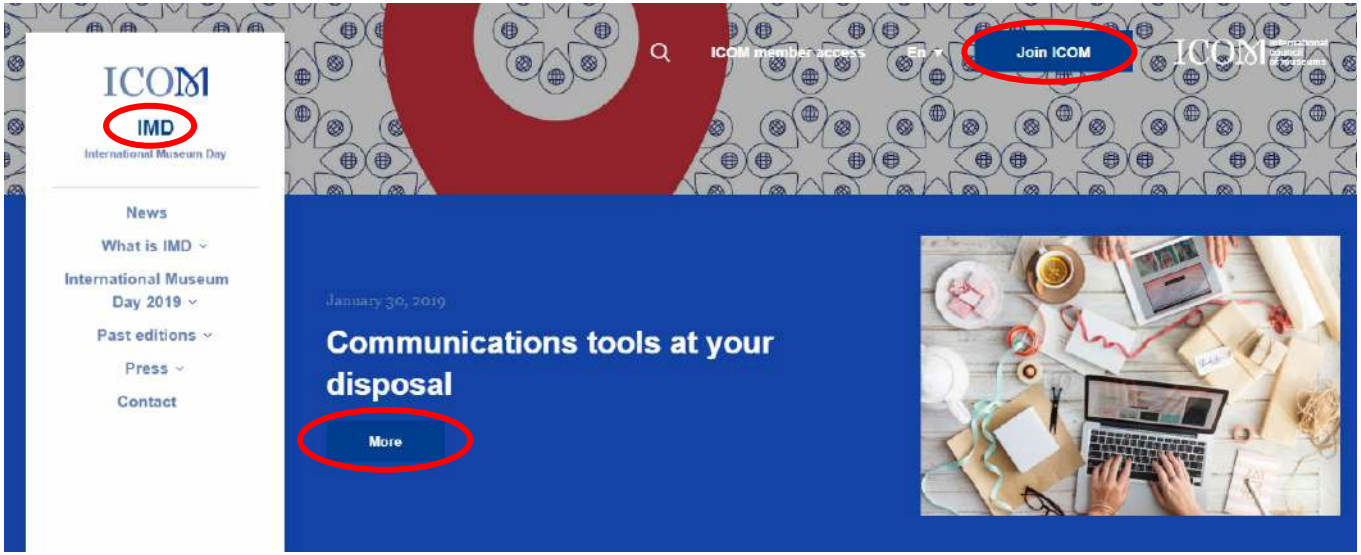
To delete a menu item click on the down arrow next to the menu item's name to view the options panel for that item and then click on the *Remove* button. After you have finished making your updates, click on the *Save Menu* button at the top or bottom of the screen.

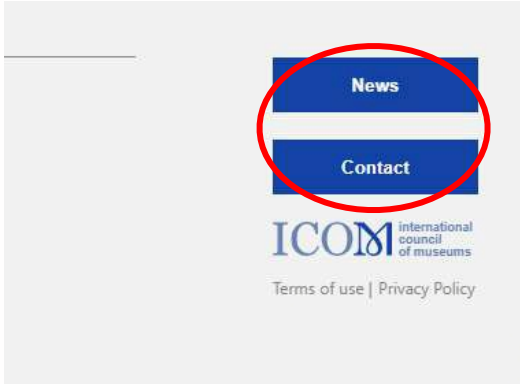
<u>Warning</u>: changing the menus directly affects the appearance of the website. Contact ICOM support if you have any questions.

Site Options

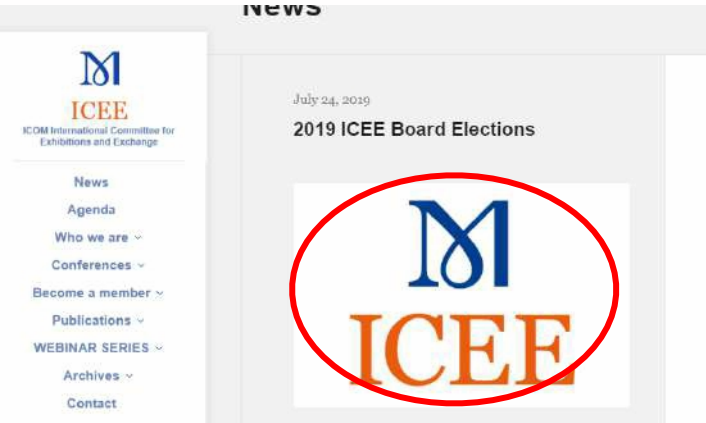
The *Site Options* menu allows you to change a few default parameters of your website:

Committee color – this parameter determines the color of your Committee Acronym in the website menu and of the buttons on the website's homepage, header and footer. By default, the Committee Color is the same of your Committee logo, so we advise not to change it.





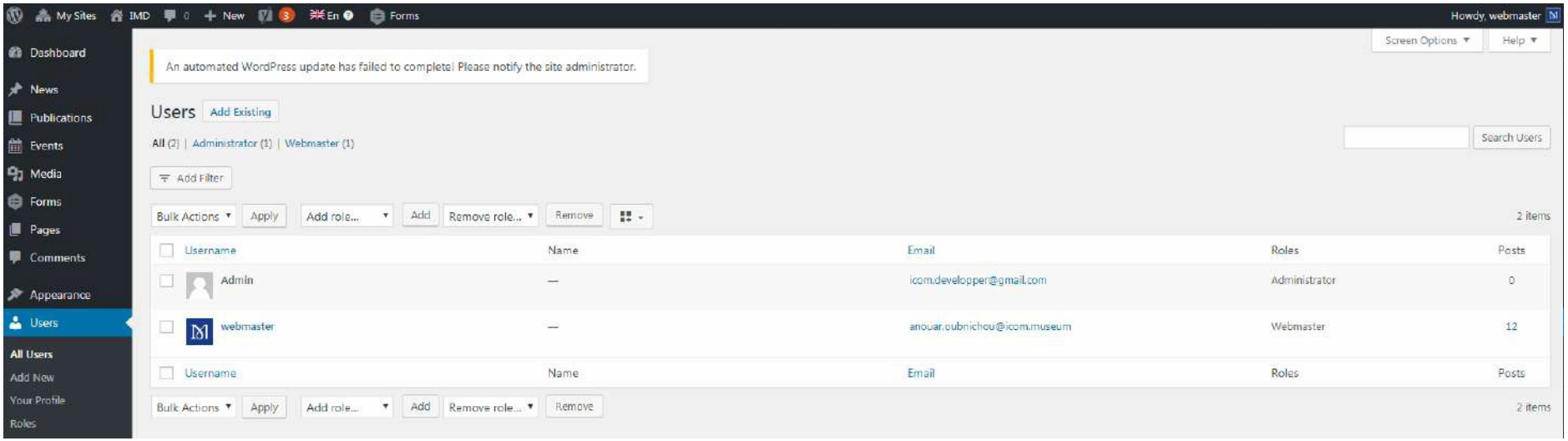
Default cover – this parameter determines the cover image that will appear in every Page if no other image is selected (see above). We selected an image that reflects your Committee's activities, but you are free to change it. The ideal dimensions of the default cover are 985x165 pixels.



Default thumbnail – this parameter determines the featured image that will appear as a News preview if no other image is selected (see above). The default thumbnail is your committee logo. The ideal dimensions of the default thumbnail are 630 pixels wide.

Users

This screen lists all the existing users of your website. Non-Administrator users will see fewer options when they are logged in. You may be able to add new users and manage their roles, depending on your status.
At the top of the screen you will find links enabling you to filter the list of users based on their user roles. The number of users with a particular role will be displayed in brackets



If you hover your cursor over each row in the list of users, links will appear beneath the username.

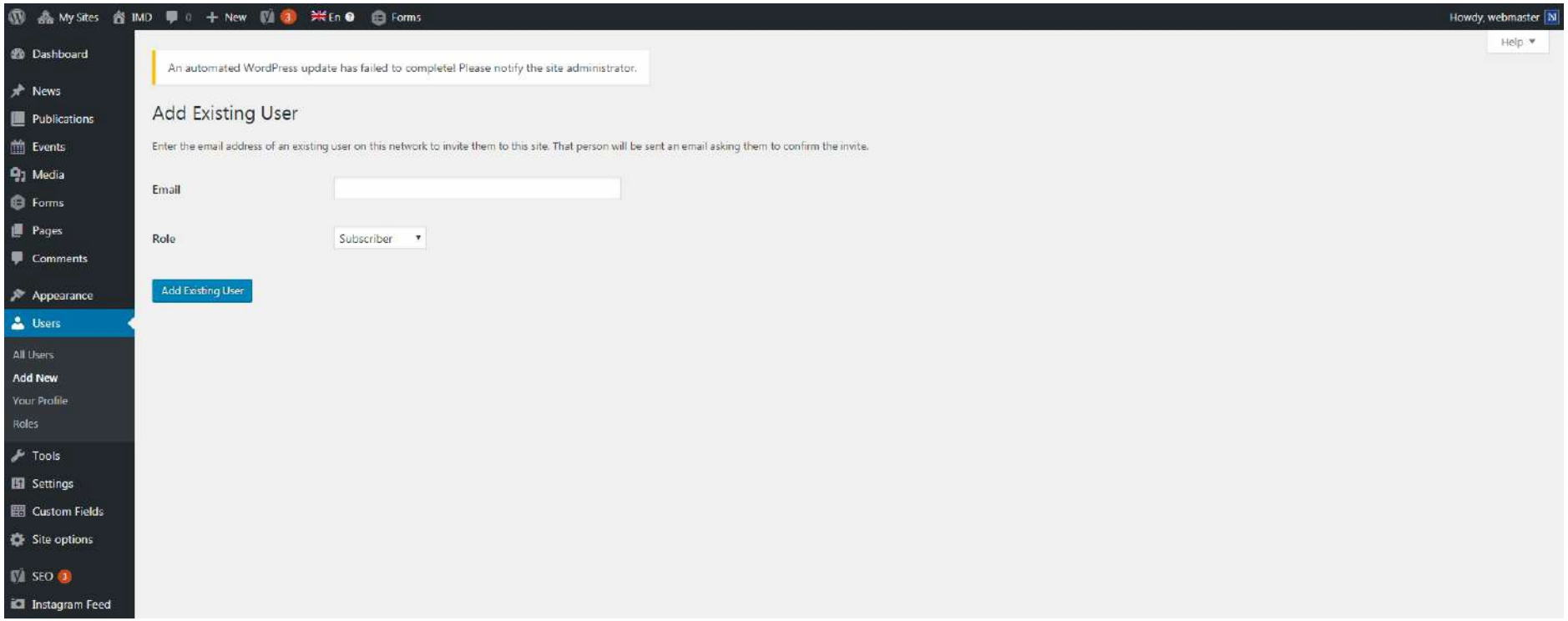
- **Edit** – Allows you to edit a user profile
- **Delete** – Allows you to delete a user profile. This link won't be available for your own profile

A user may have one of five pre-defined roles selected by the Site Administrator: Site Administrator, Editor, Author, Contributor or Subscriber.

- **Super Admin** – (Only for the Administrator within the Secretariat)
- **Administrator** – Someone who has access to all of the administration features
- **Editor** – Someone who can publish and manage news and pages as well as manage other users' news, and so on
- **Author** – Someone who can publish and manage their own news
- **Contributor** – Someone who can write and manage their news posts but not publish them
- **Subscriber** – Someone who can only manage their profile

Adding a New User

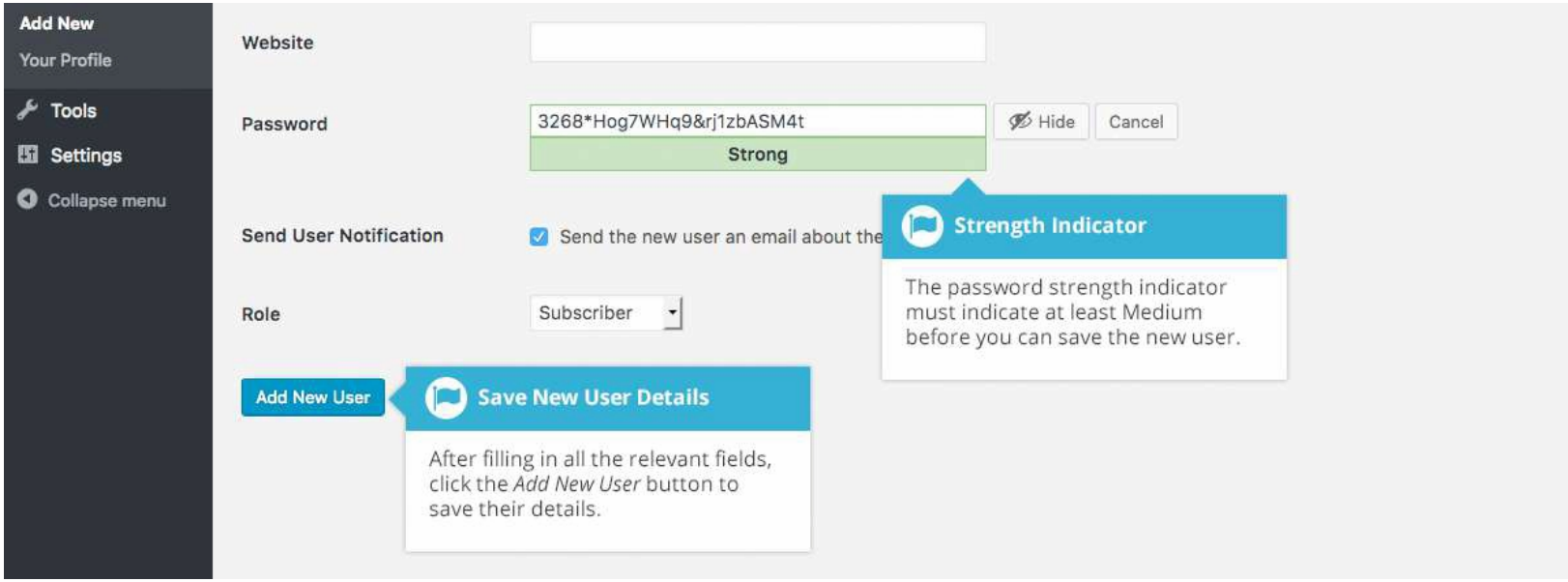
To add a new user, click on the *Add New* button in the left-hand navigation menu or the *Add New* button at the top of the page.



Once the above page has been displayed, simply complete the various fields and click on the *Add New User* button.

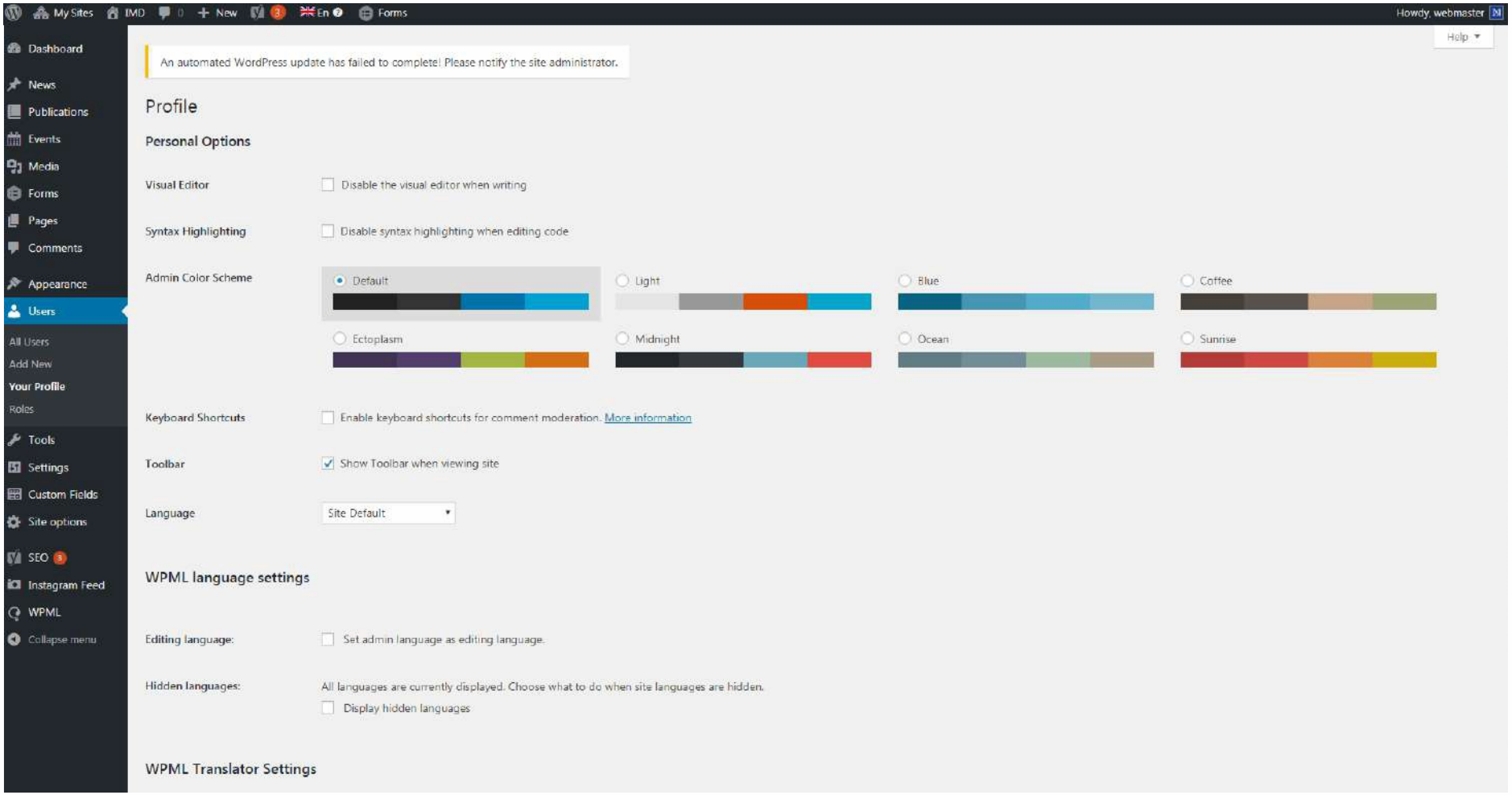
- **Username** (mandatory) - This will also be used as the Login name for the user. Once saved, the username cannot be changed
- **E-mail** (mandatory) - Each user must have a unique email address. If a published news post or page is approved by this user they will receive a notification email each time a new comment in this news post or page has been approved.
- **First Name** – Enter the first name of the new user here
- **Last Name** – Enter the last name of the new user here
- **Password** – Clicking on the *Show password* button will show you the password that has been automatically generated for the new user
- **Send User Notification** – If this is ticked, WordPress will send an information email to your new user
- **Role** – Select the desired role for the user from the dropdown list

WordPress will automatically generate a strong password when you create a new user. Clicking on the *Show password* button will show the password that was generated and will also allow you to change it if you wish. The password strength indicator, displayed just below the password field, must be at least Medium before WordPress will allow you to save the new user. It goes without saying that the stronger the password, the more secure the connection details will be. It is therefore recommended that you have a password that is considered to be strong by the strength indicator. To make a password stronger, use upper- and lower-case letters, numbers and symbols like ! ” ? $ % ^ &).



Deleting a User

To delete a user, click on the *Delete* button that appears beneath the username when you hover your cursor over each row. The *Delete* button will not appear for the user that is currently logged in.

Editing your Profile

To edit your profile details, simply click on your username, if you have the list of users displayed, or click on the *Edit* button that will appear beneath your username when you hover your cursor over each row. Alternatively, click on the *Your Profile* button in the left-hand menu.