

IEEE Power & Energy Society (PES): WordPress PES Theme Setup Guide

Guide Version 1.2 – Last Updated on May 5th, 2014 – For WordPress version 3.7 or later

Introduction

Websites are an important way for your Chapter or Committee to present itself to the outside world. PES has developed WordPress themes to help you create and easily maintain your web site. IEEE offers free hosting for Chapter and Committee websites. WordPress is a content management system which allows you to manage a website without the requirement for knowing HTML coding. This guide will help introduce you to the WordPress system and walk you through the process of setting up the PES Theme.

What is WordPress?

The WordPress interface is designed to be user-friendly and easy to understand. Adding or editing webpages using this platform is as easy as using a word processing program to write a letter. WordPress gives you the ability to use a graphic user interface to format, stylize, and adjust your content. This makes creating and editing pages simple.

Requesting a WordPress site from IEEE

To request WordPress hosting, go to <http://sites.ieee.org/hosting/> and follow the link to the “WordPress hosting request form.” Fill out the required information. In the “Your Message” field, indicate that you want the IEEE Power & Energy Society Themes installed. The themes are also available download individually on the Webmaster Resource webpage: <http://ieee-pes.org/about-pes/webmaster-resources>

Please allow 1-2 weeks for IEEE to review your request. After IEEE has processed your request, you will receive an email confirmation with information on how to start working on your website. You will be given your website’s URL, and administrator log-in credentials. At this point, you are ready to follow the instructions below.

New to WordPress?

If you have not used WordPress before, it is strongly suggested you review the Web Editors Guide: <http://sites.ieee.org/files/2011/04/WordPress-Editors-Guide-WL.pdf>

Please note: The information included in the WordPress Editors Guide is from 2011. Although the interface and tools reviewed in this guide remain largely the same, some wording or icons may differ.

Known Limitations and Restrictions

IEEE’s installation of WordPress does have some limitations and restrictions you should keep in mind. Most of these items should not affect your experience, however it is wise to make note of these items. Please note this is not a complete list, this is only what PES have noticed during our experiences.

- You do not have access to a theme’s HTML/CSS/PHP code editor mode.
- Widgets cannot have PHP code used in them, if you type PHP code into a widget it will be automatically removed.
- In some rare cases changing the theme may delete the previous theme you were using. Making it unavailable for you to revert to. This means that if you accidentally change themes, you may not be able to go back to the previous theme used. So while you may change theme settings and options, we advise you do not change the theme. If you run into a problem, IEEE can provide technical assistance to restore the previous theme used.
- IEEE provides a large selection of plug-ins for you to activate and use. If you need an additional plug-in, please input the request to IEEE directly to be reviewed. However the selection of plug-ins available to you should be sufficient for most needs.

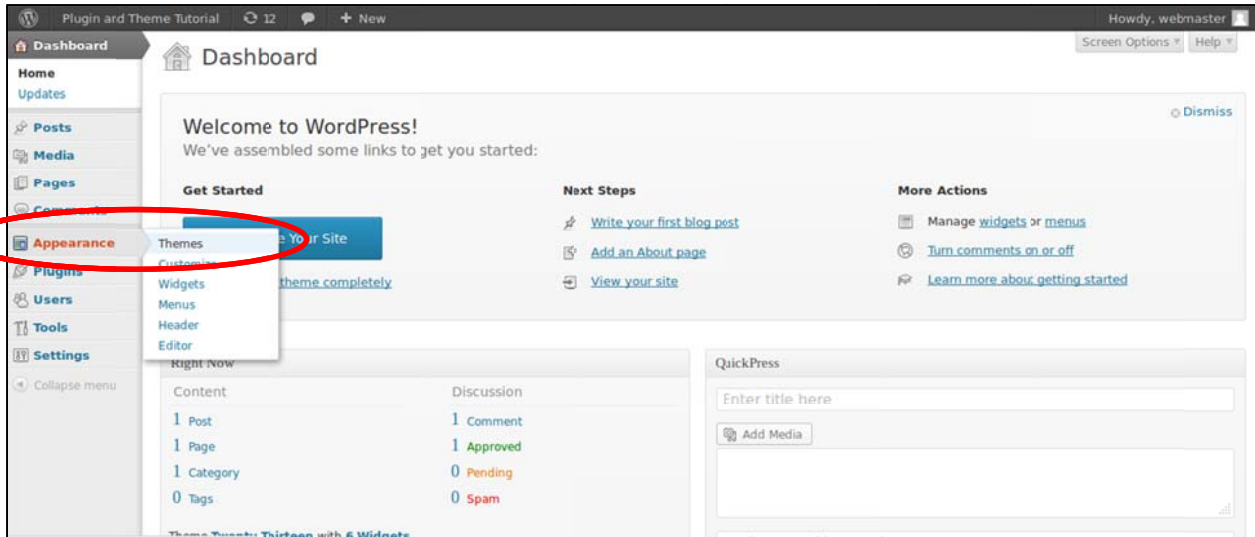
Getting Started With Your WordPress Website

1. Login with your admin credentials at <http://yoursite/wp-login>
If you setup a website through IEEE, you should have received an email containing your login credentials and the URL of your website. IEEE WordPress URLs start with: <http://sites.ieee.org/>
Your login URL should look like: **<http://sites.ieee.org/yourwebsitename/wp-admin>**

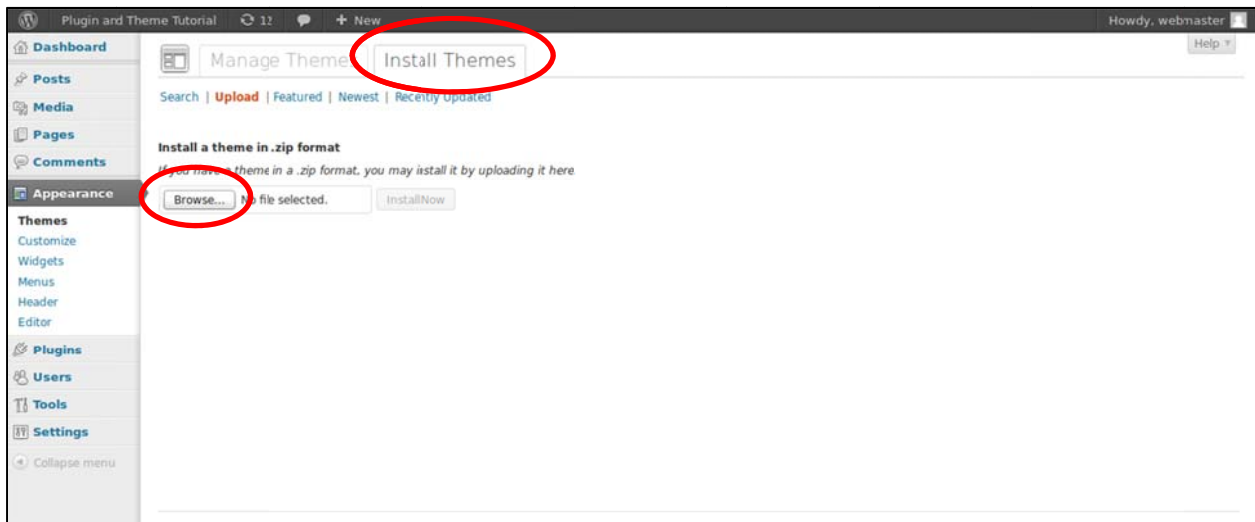


Installing Theme file on a dedicated or shared server with WordPress 3.7

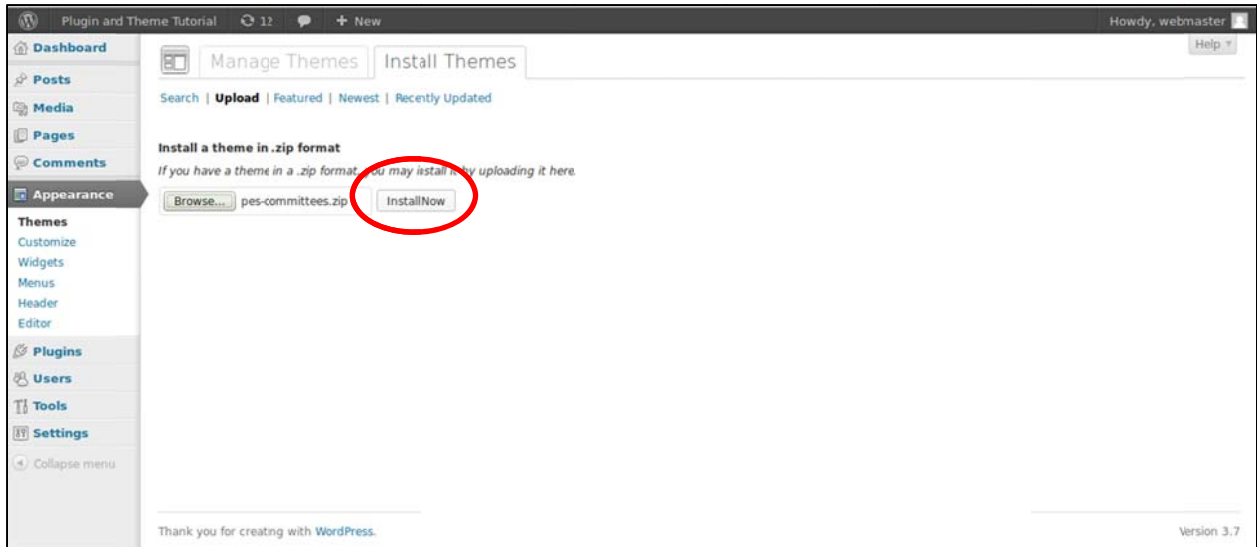
2. If you requested a WordPress site through IEEE, then the PES theme is already installed on your IEEE Entity Web Hosting (EWH) website. You can then skip steps 2 – 6 and start at step 7 instead. If you are not on the IEEE (EWH) server, go to “Appearance” and click “Themes”.



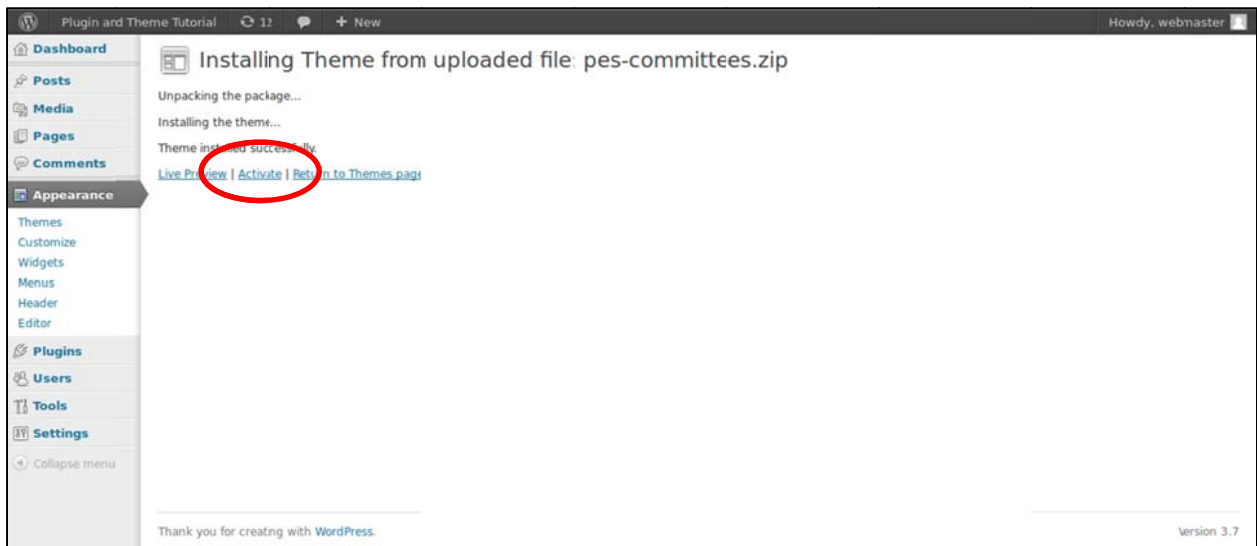
3. Click the “Install Themes” tab and click the “Browse...” button.



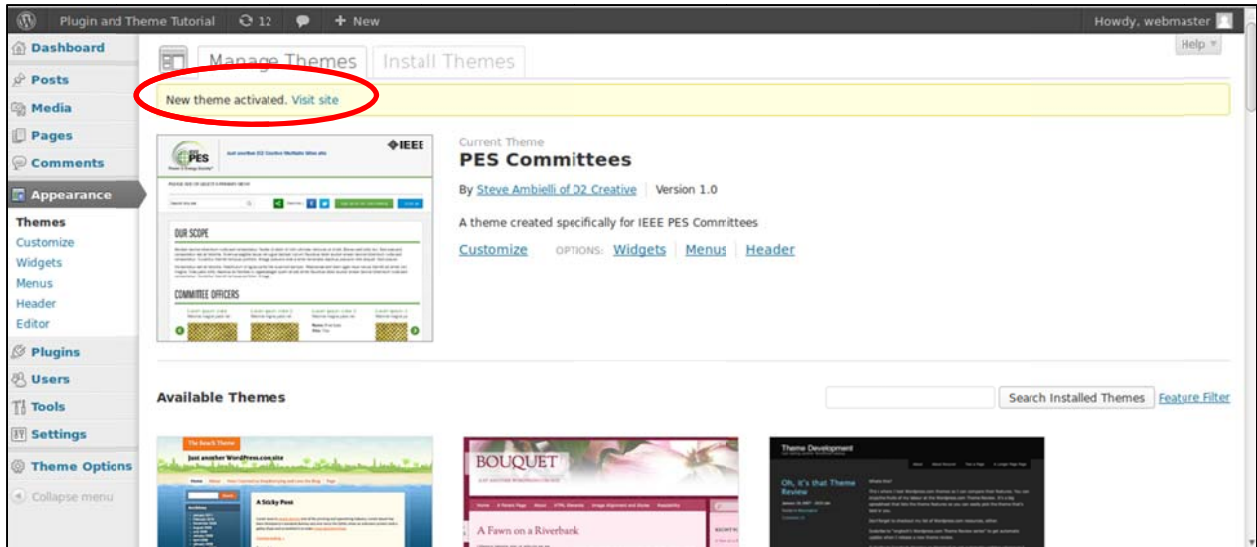
4. Click the “Browse” button and Select the “pes-committees.zip” file from your hard drive, and click the “Install Now” button. If you do not have this file and would like to install it on a Power & Energy Society WordPress website residing on your own server, please contact Ray Umali - r.umali@ieee.org or pes@ieee.org



5. You should see the following screen. Click “Activate” to use the PES theme.

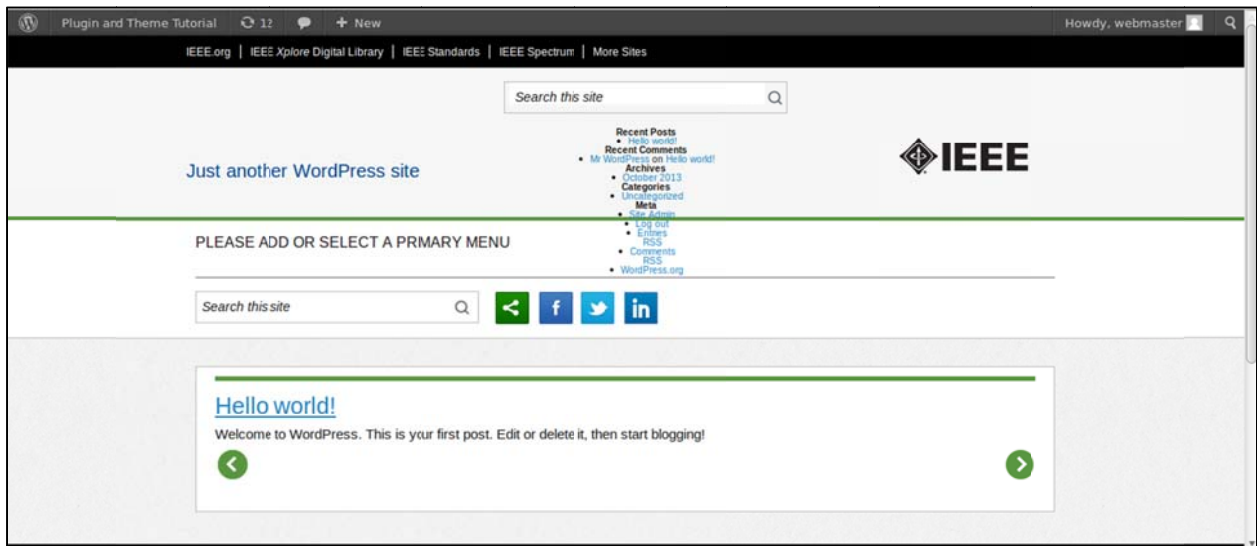


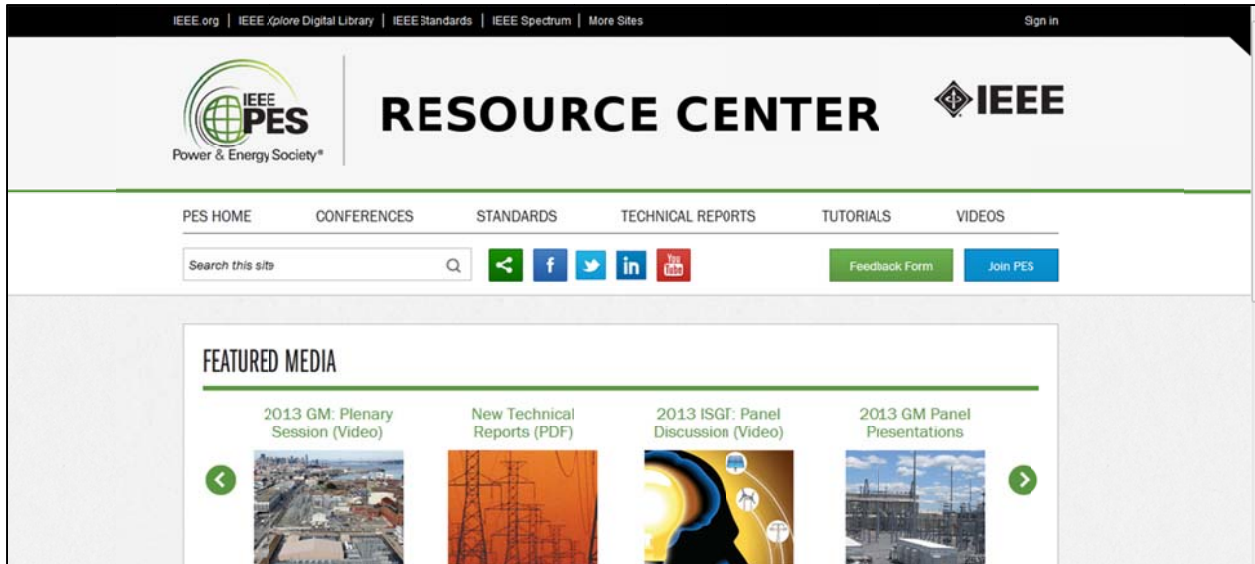
6. The PES theme is now activated. Click “Visit site” to see the theme.



WordPress should confirm that the newly selected theme was activated successfully.

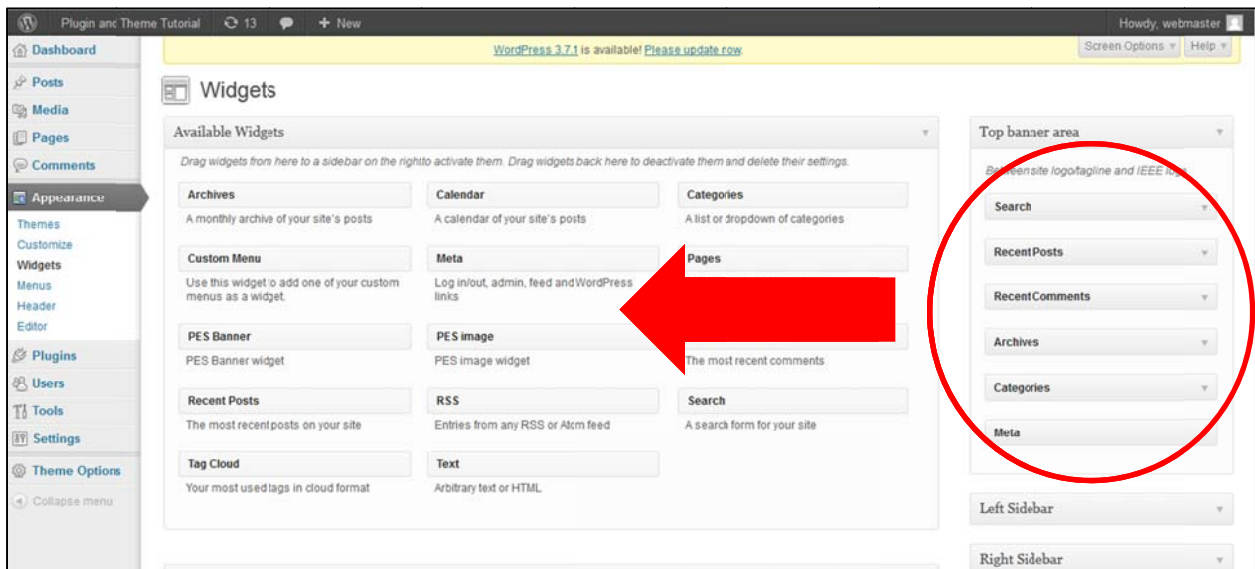
The PES Theme will look like the following screenshot below, this is normal. There are several steps to follow in order to get it to look like the next screenshot of the IEEE PES Resource Center (next page):



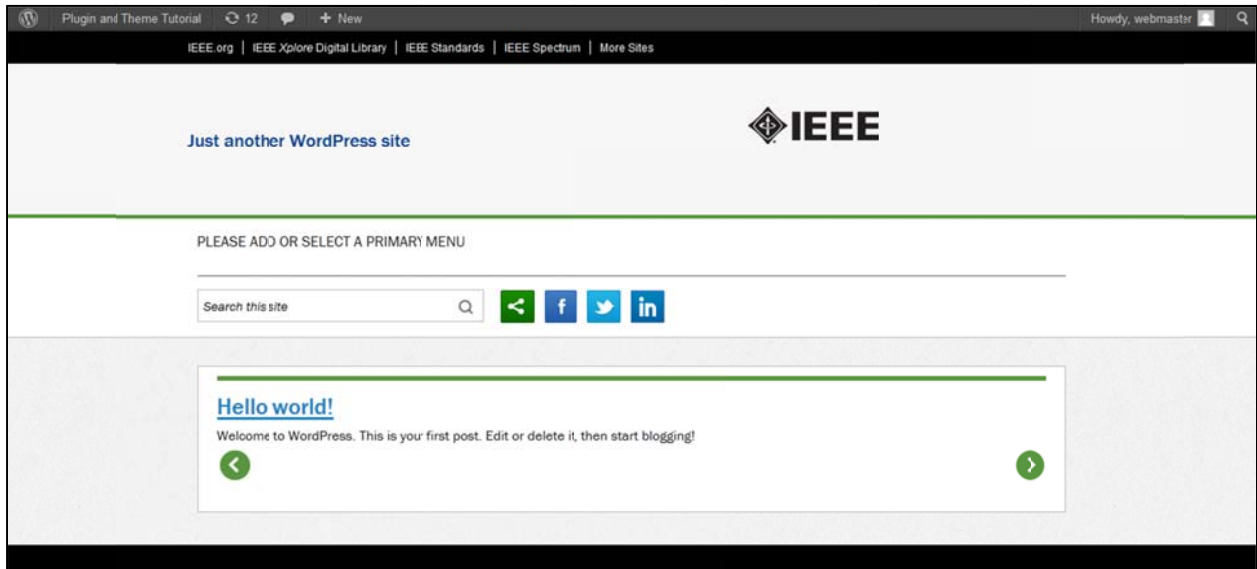


Removing Widgets from the top/middle of the page

7. From the WordPress dashboard, select 'Appearance' and then 'Widgets'. First, remove the default widgets. Basically, drag "Search," "Recent Posts," "Recent Comments," "Archives," "Categories," and "Meta" out of the "Top banner area."

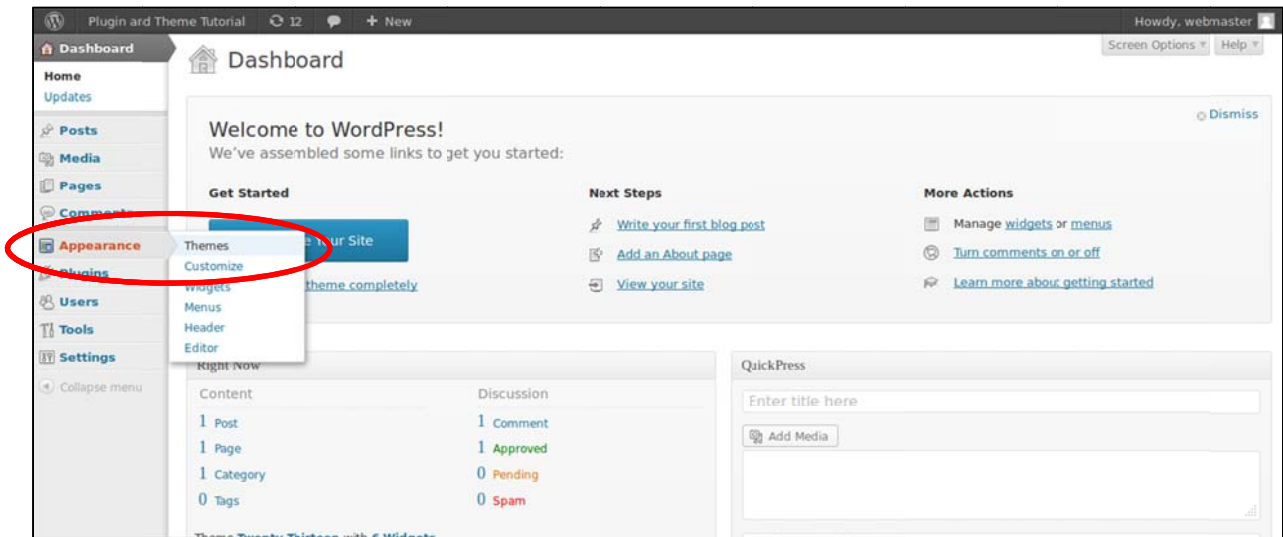


With the default widgets removed, your site should look similar to the following now:

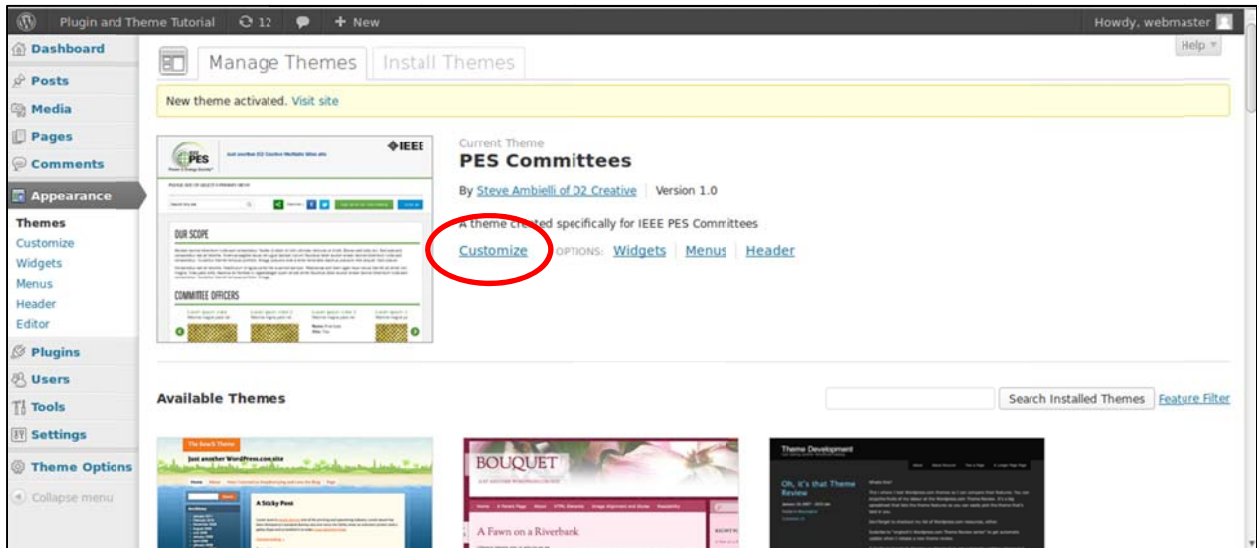


Removing or Changing Site Title and/or Tagline

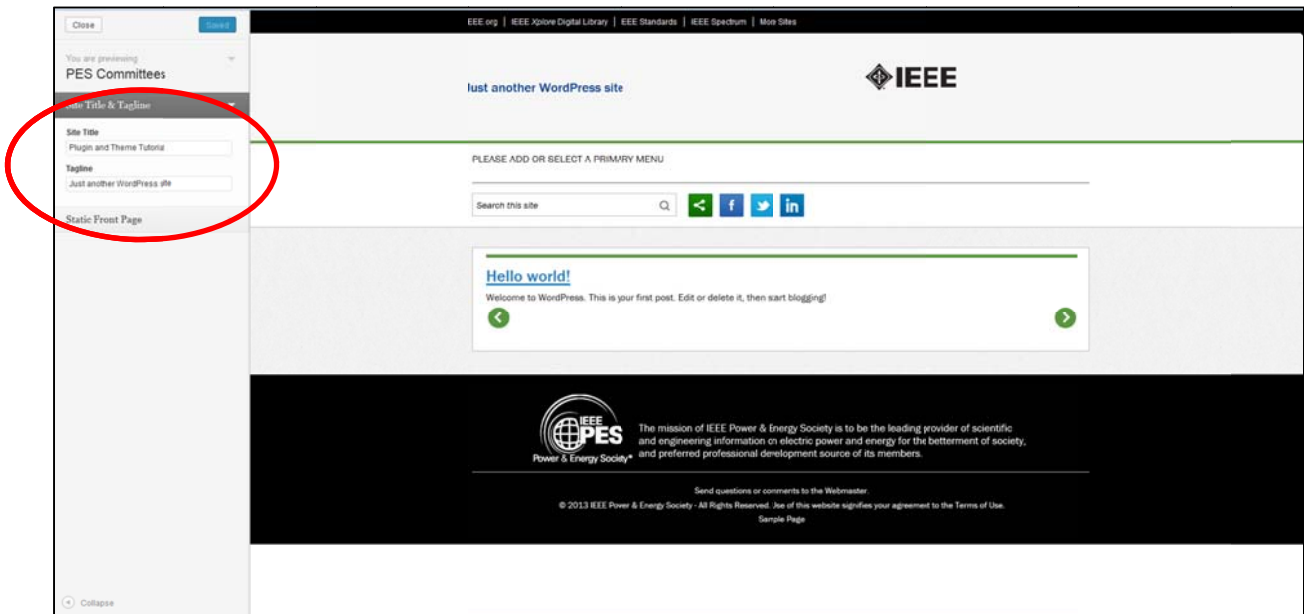
8. Go back to the "Dashboard," and navigate to "Appearance" and click "Themes."

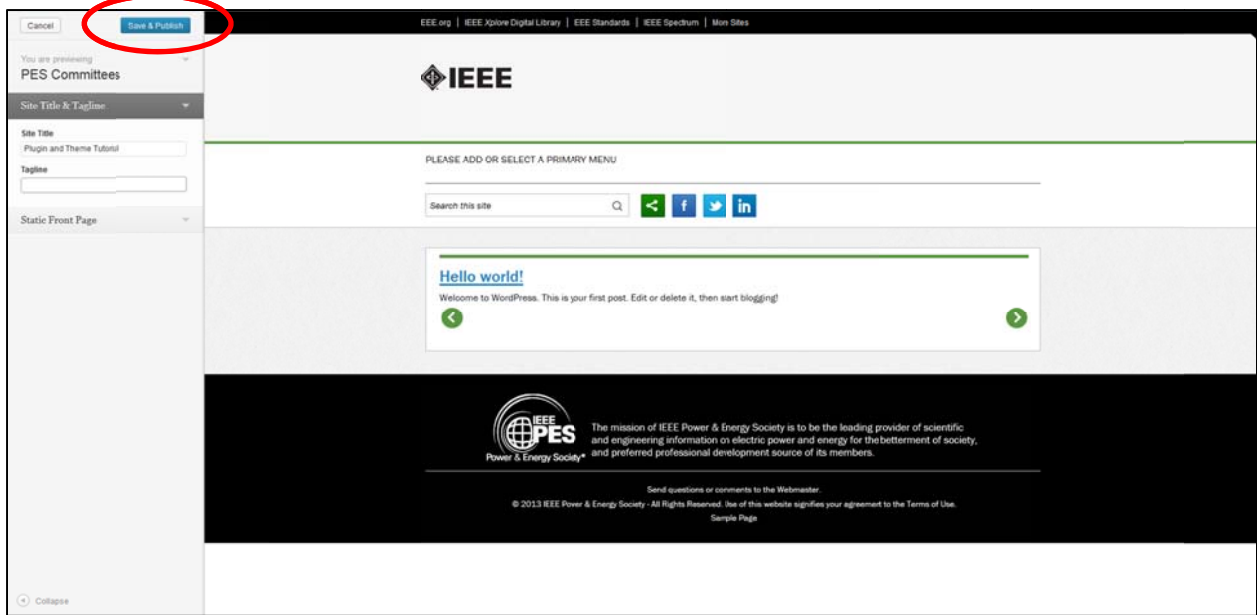


9. Click “Customize.”

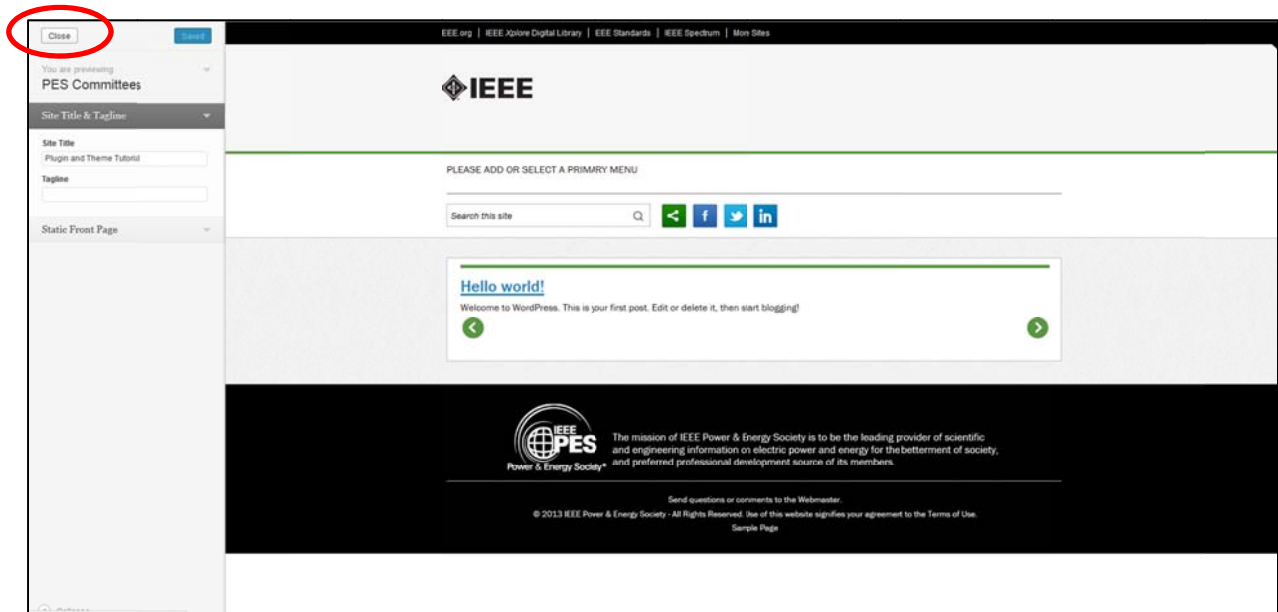


10. Delete “Tagline” to make room for a banner. Change “Site Title” to a name such as your committee, chapter, or conference. Click “Save & Publish” button to complete changes.



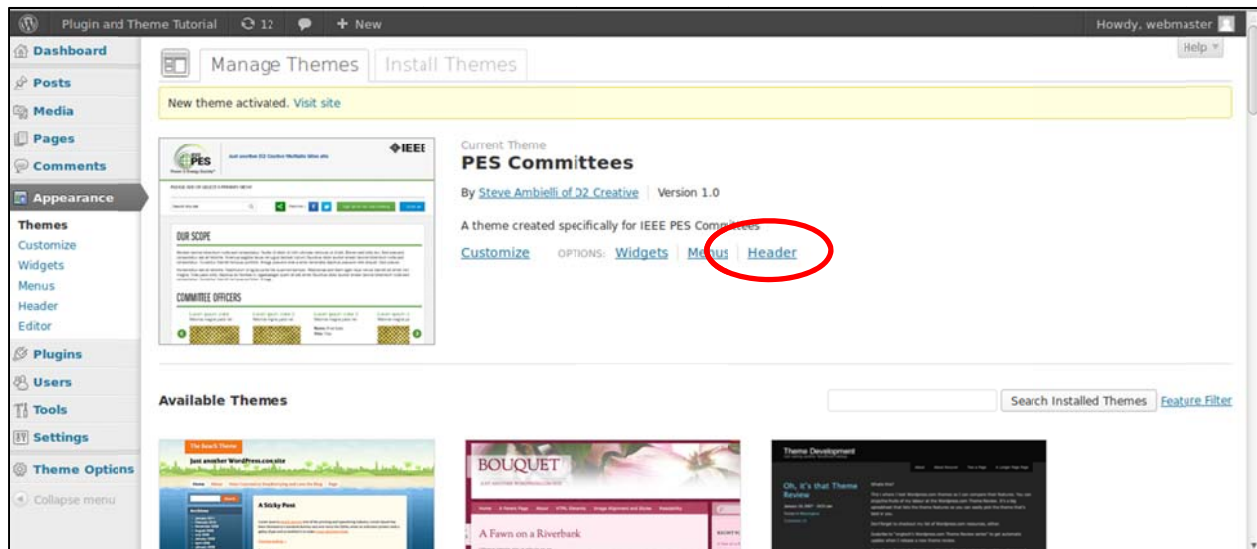


11. Click the “Close” button.



Adding the PES Logo to Header

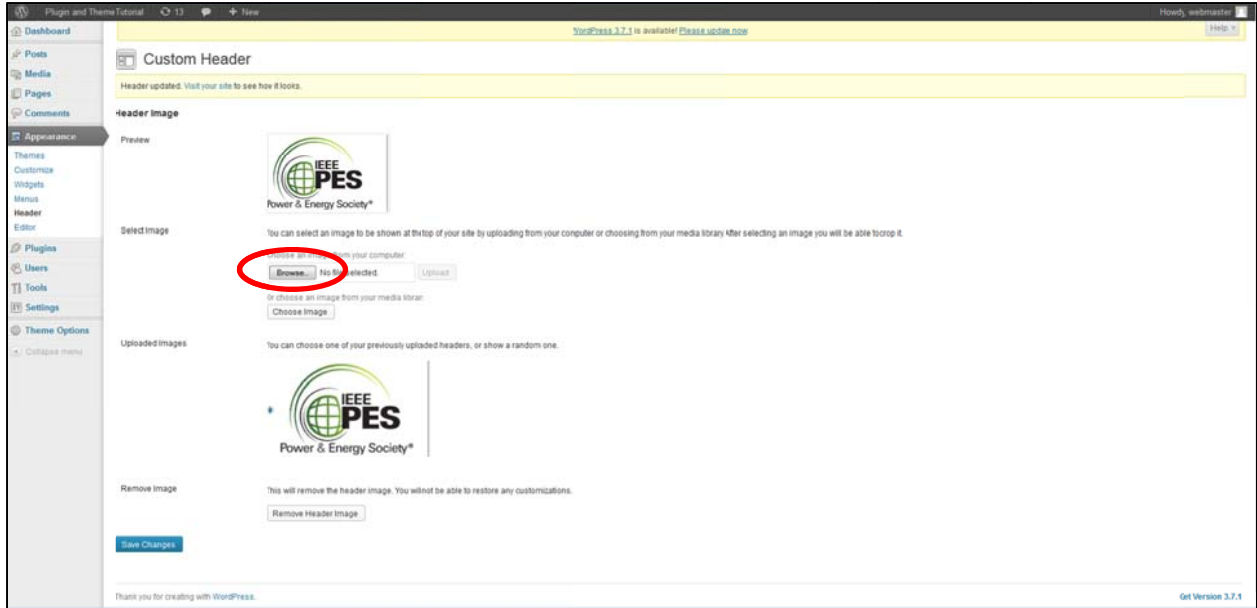
12. Click “Header.”



13. Click “Browse” and “Upload” buttons to add a PES Logo from your hard drive. Please resize logo to 185 x 121 pixels for optimal results.

A pre-sized PES logo is available to download from the IEEE PES Website under the Webmaster Resources page. Link: <http://ieeepes.org/about-pes/webmaster-resources>

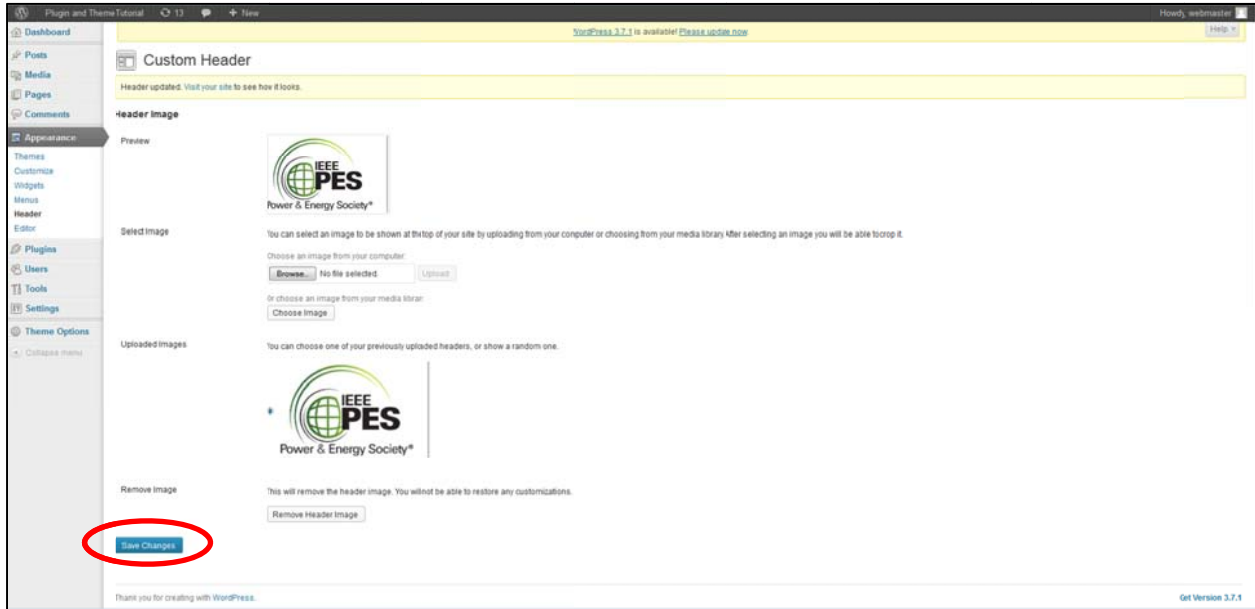
14. If you do not have a PES logo file that works well, please contact Ray Umali – r.umali@ieee.org or pes@ieee.org



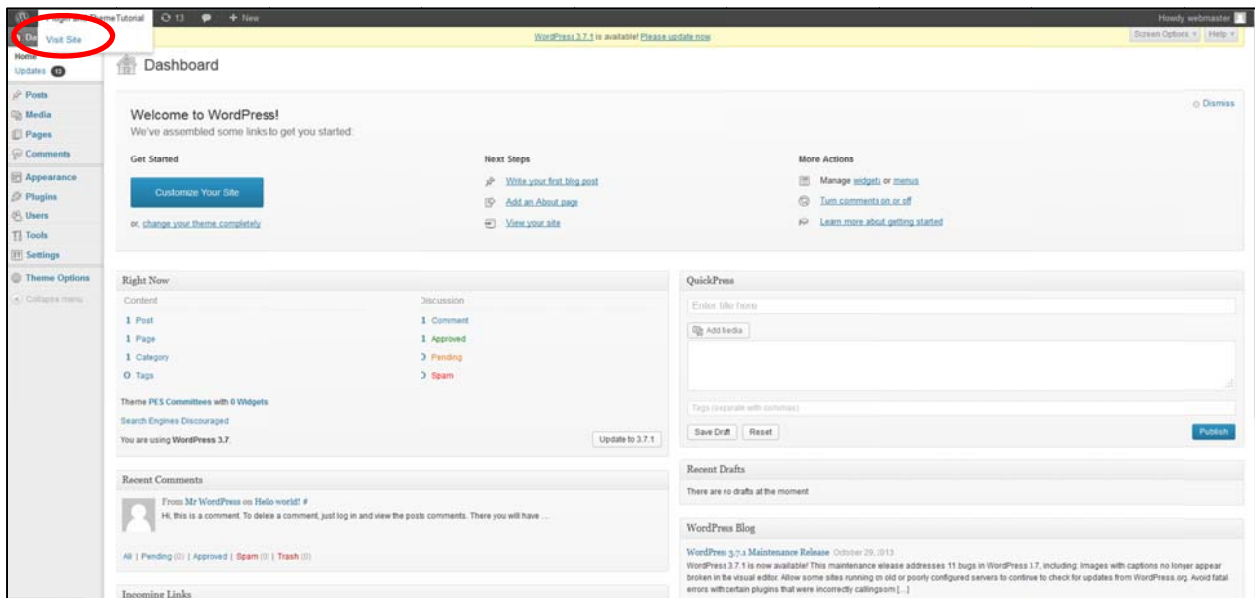
15. Drag the cropping square to fit the entire logo, and then click “Crop and Publish.”



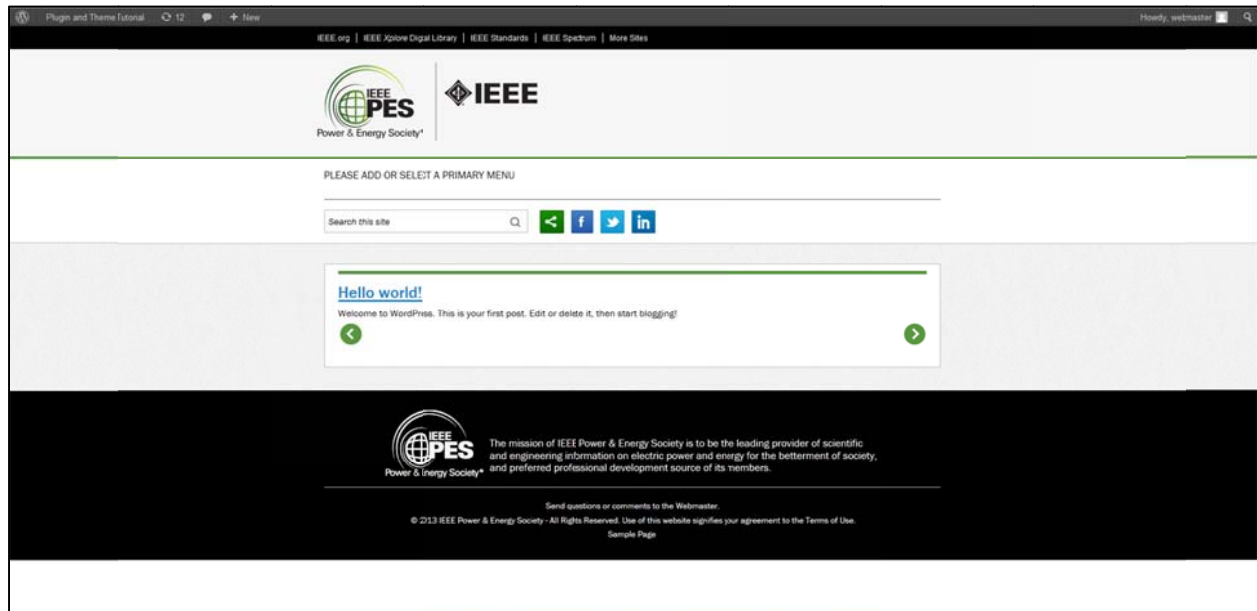
16. Click “Save Changes” to ensure header logo is saved.



17. Click “Visit Site” to see the improvements.

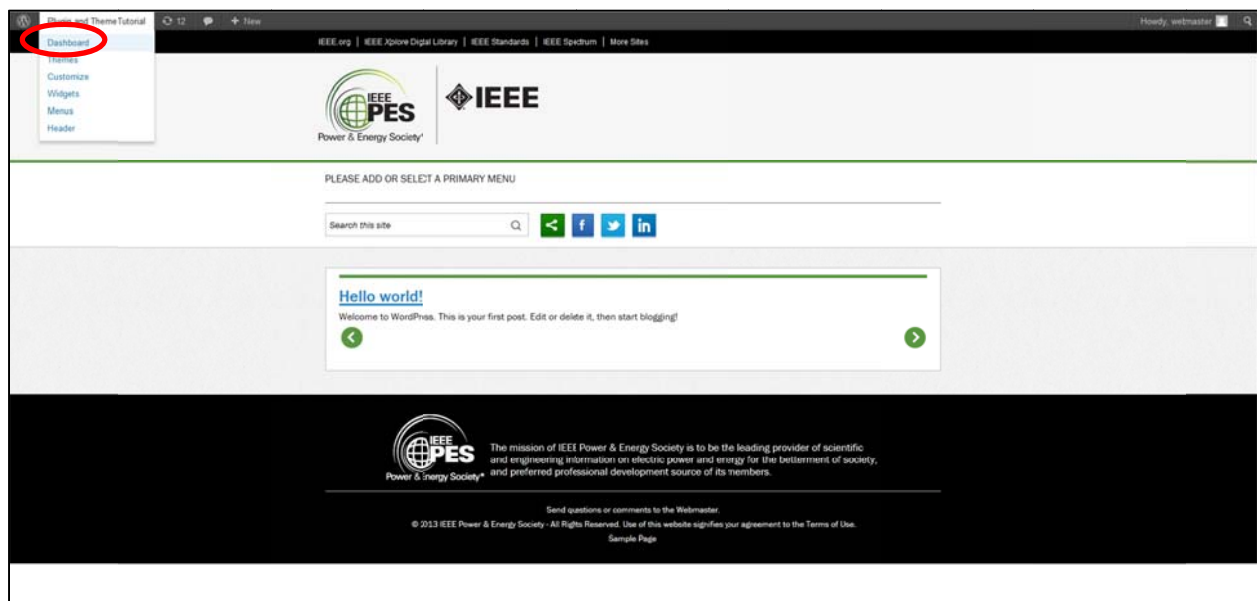


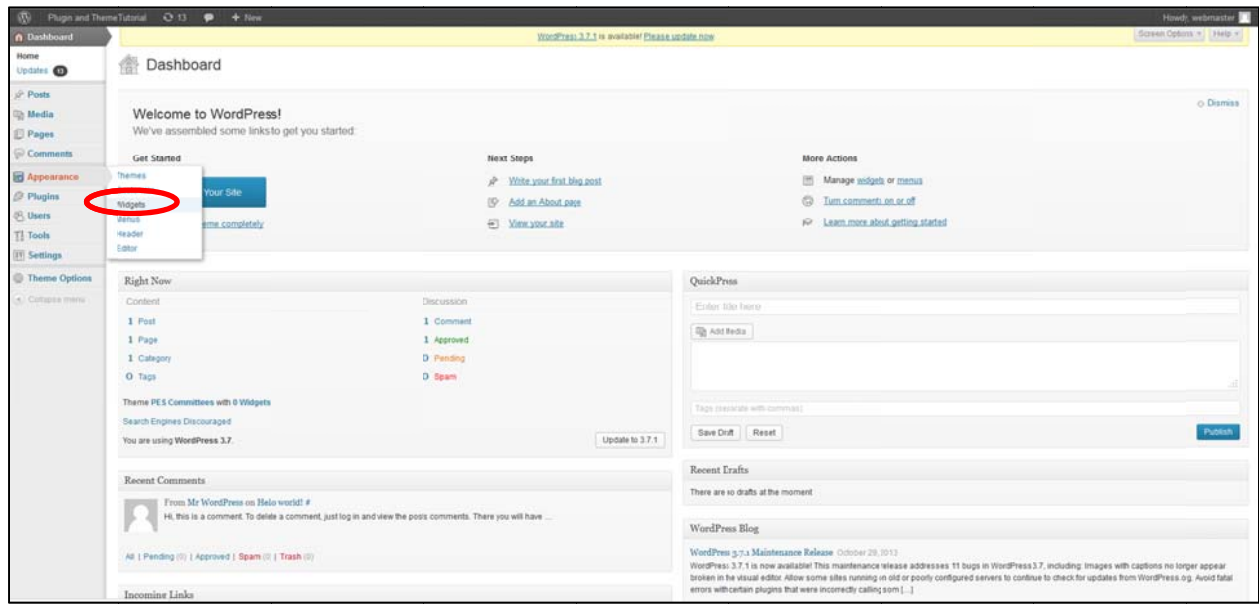
Your site should look similar to the following:



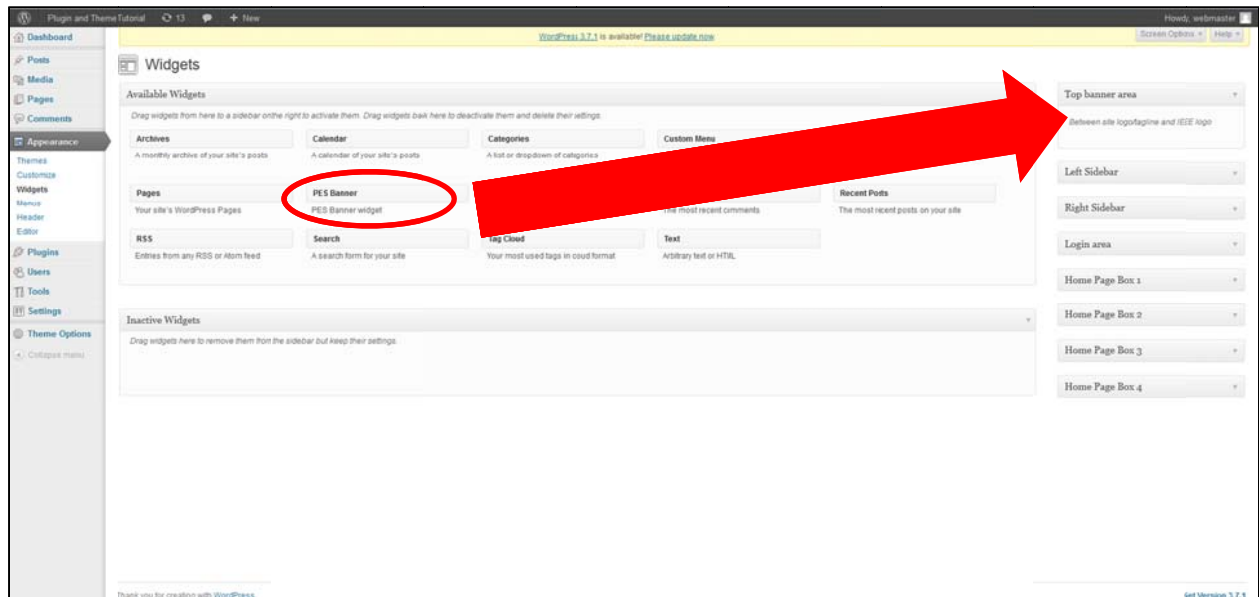
Adding a banner for your committee, conference, chapter, et cetera

18. Go back to the “Dashboard,” and click “Widgets.”

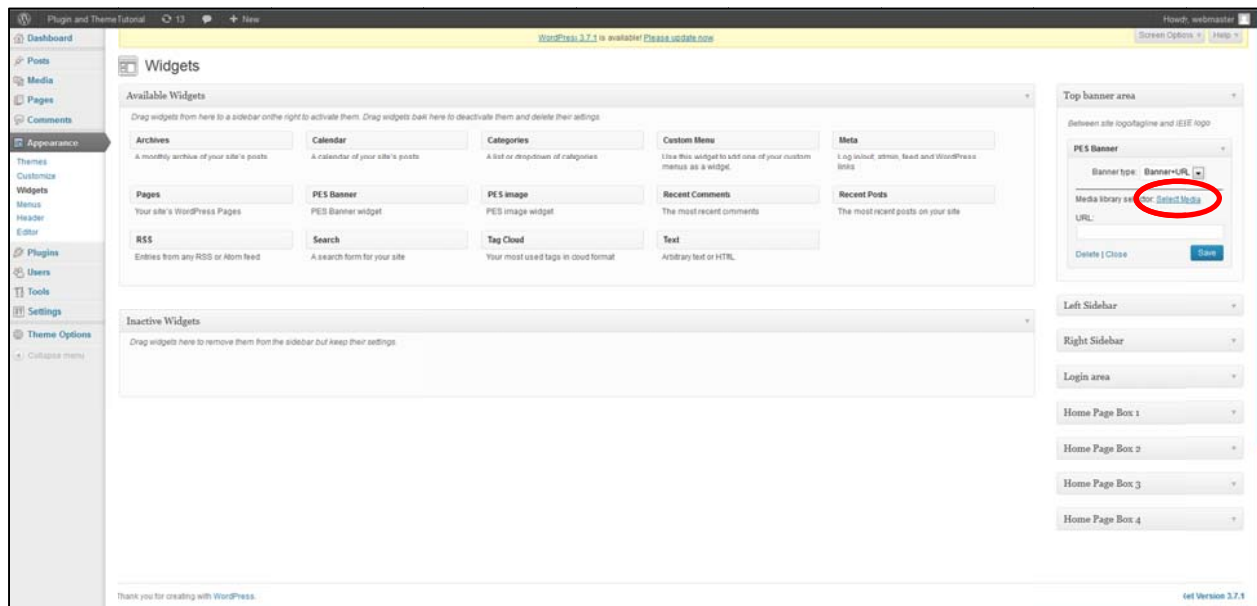




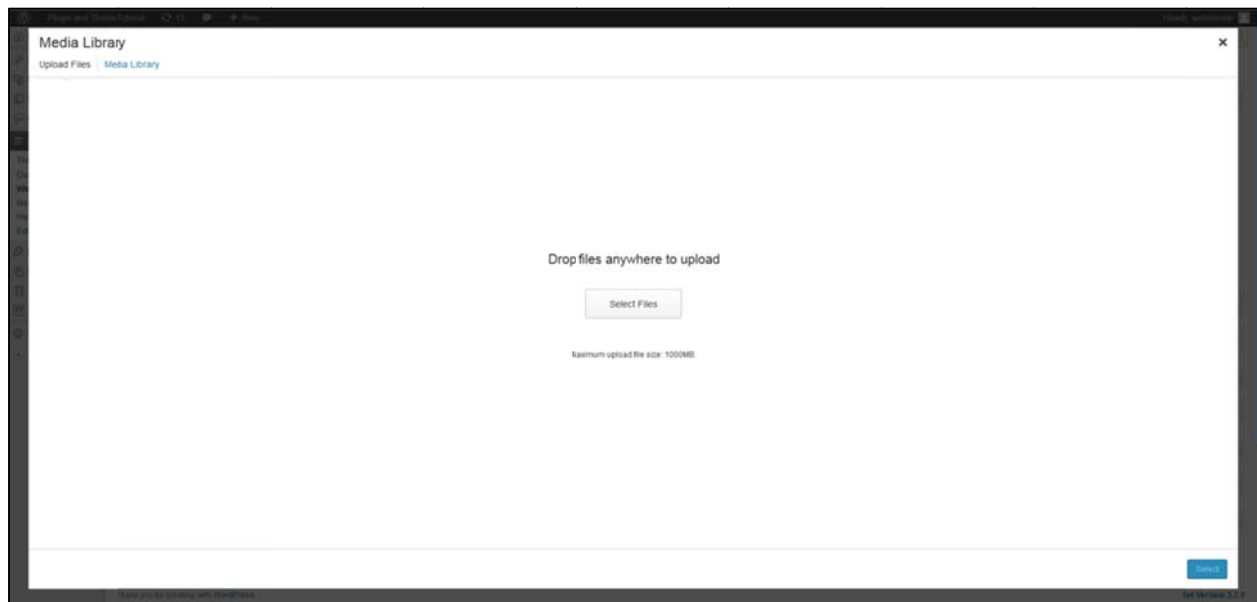
19. Drag the “PES Banner” widget into “Top banner area” section.



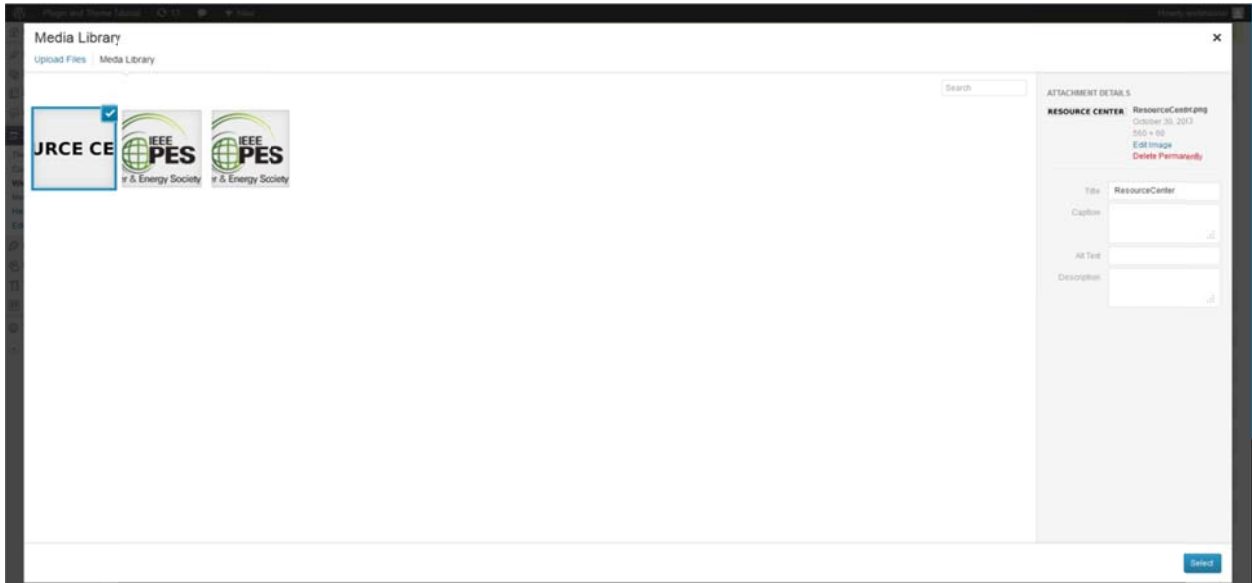
20. Now, the “Top banner area” should contain the PES banner widget, so now click “Select Media” to add a banner of your choice.



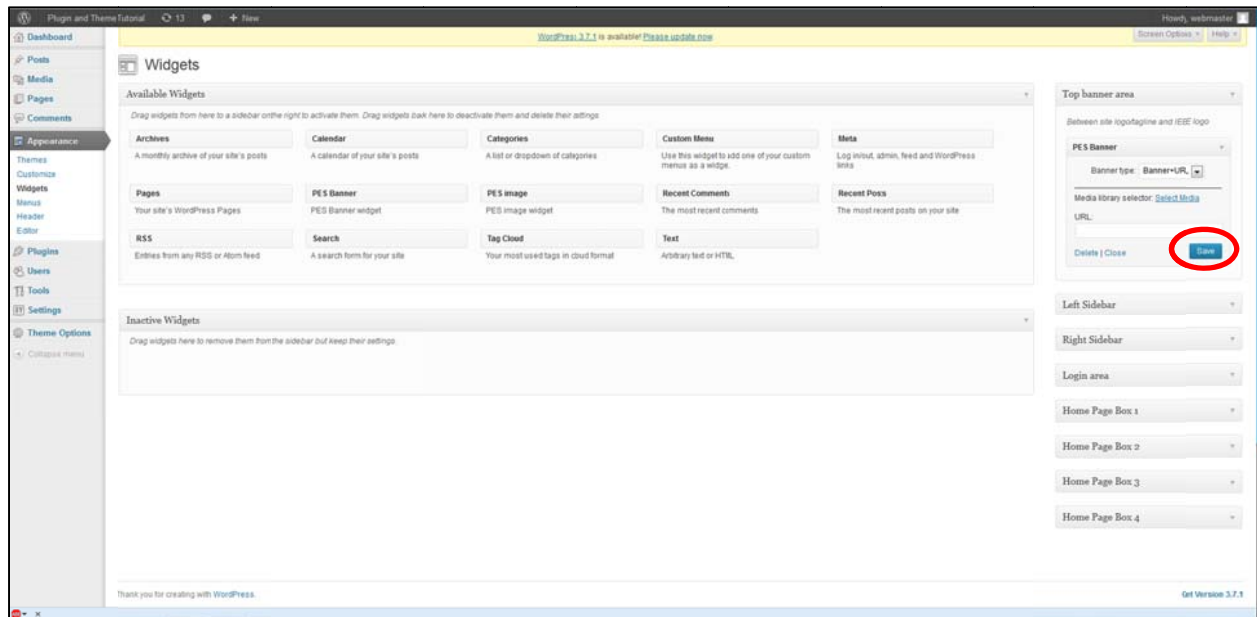
21. Click the “Select Files” button, and open/upload a banner image from your computer. For optimal results, resize your banner image to 560 x 60 pixels.



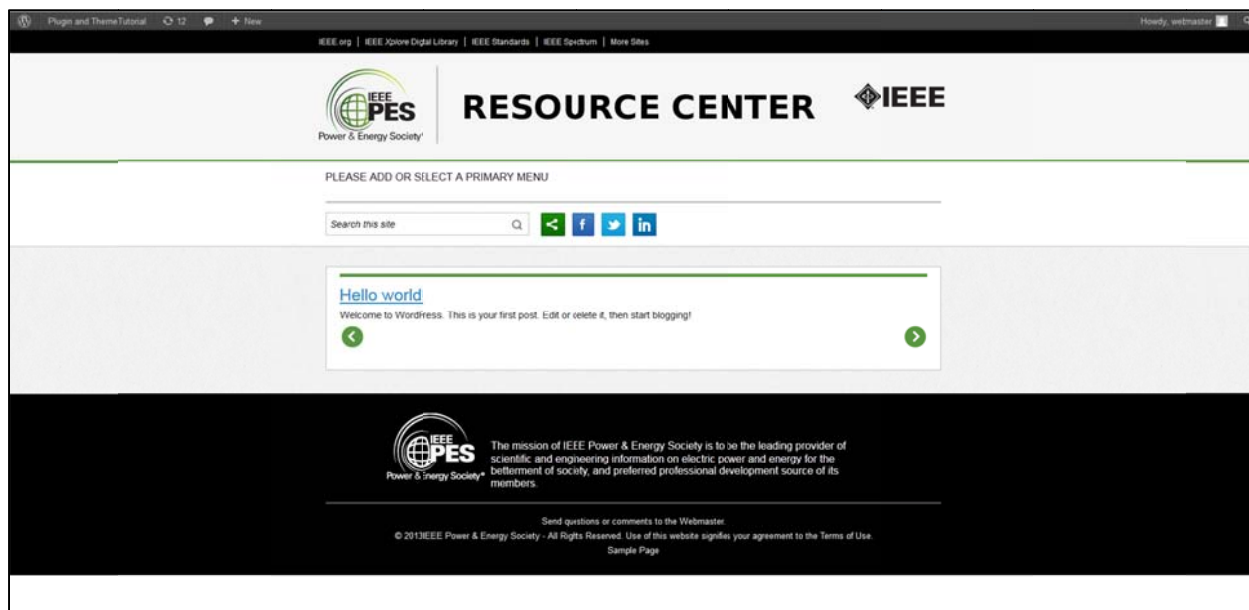
Your Media Library will look like the following. Select the graphic banner file you wish to use.



22. Click the “Select” button and your banner will be saved, but you also must click the “Save” button in the widget box for the banner to appear. You can add a URL if desired.



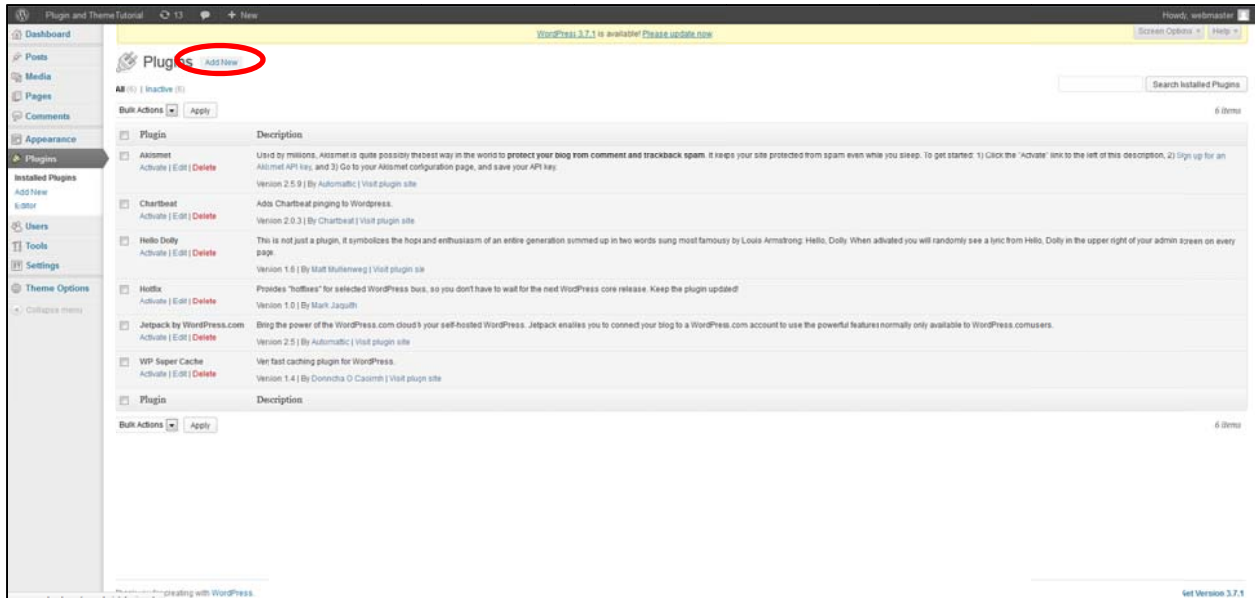
Your site should now look like the following:



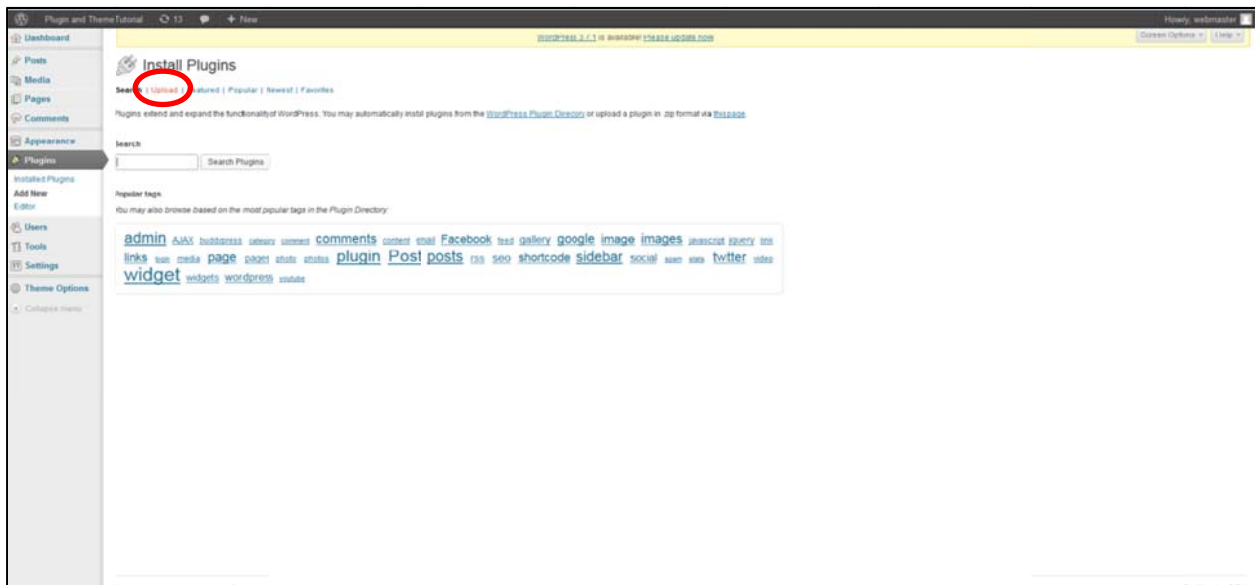
Installing PES Single-Sign-On (SSO) plugin

23. **Please note:** The PES theme is dependent on the pes-sso.zip plugin for the picture carousel to function correctly. If you do not install the plugin, the front page will not look organized with the picture carousel active. You do not need to utilize the SSO plugin's functionality if not required. If you just want a static front page without a picture carousel, you do not need to install the SSO plugin.

Go to "Plugins" in the "Dashboard." If you are on IEEE EWH, you should find (Ctrl+F) "IEEE SSO sign in" as one of the available plugins. Just click "Activate" and you can skip steps 22 - 24. If you are not on EWH, click "Add New."



24. Click "Upload."



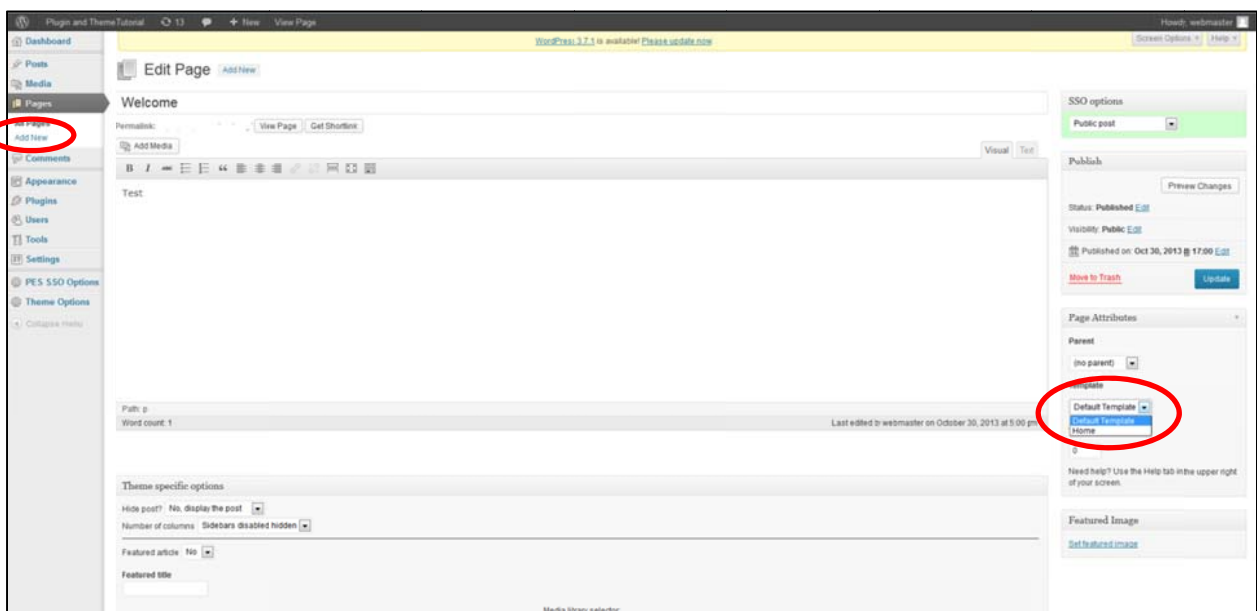
25. Click the "Browse..." button and add the pes-sso.zip by clicking the "Install Now" button. If you do not have this file, please contact Ray Umali – r.umali@ieee.org or pes@ieee.org

Then, click "Activate Plugin" and the PES SSO plugin is now installed and active.

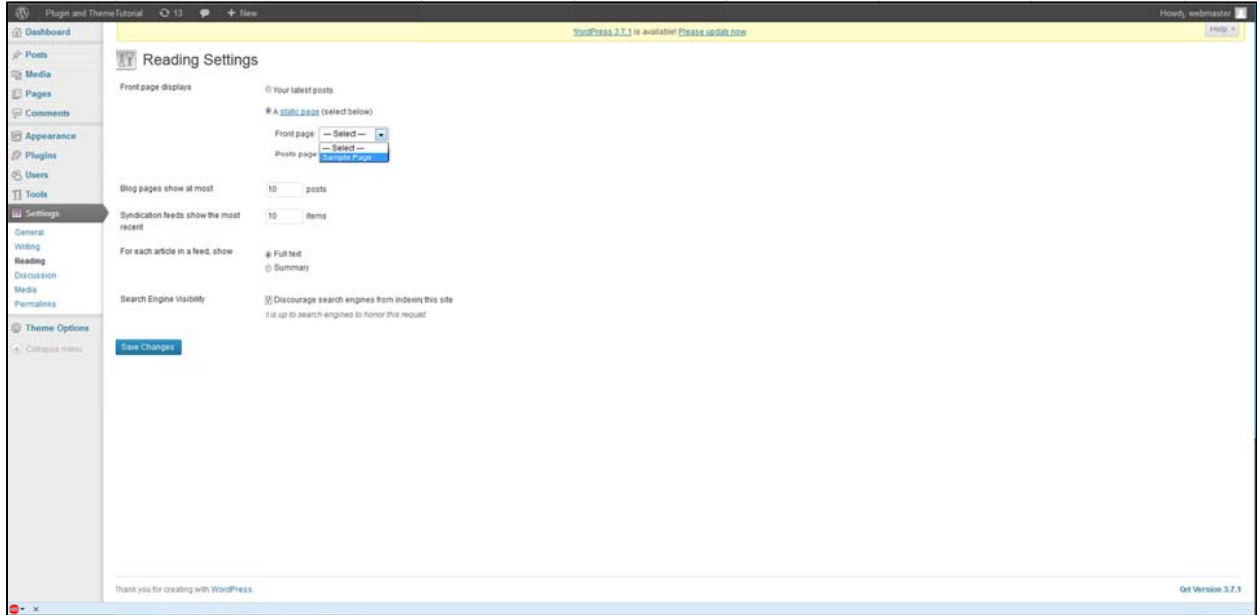


Creating a Front Page and “Reading Settings”

26. Create a “Page” by clicking “Add New.” Add a title and content. If you want your front page to be just a static page, use the “Default Template” in the drop-down. If you want to utilize the picture carousel, click “Home” in the drop-down.

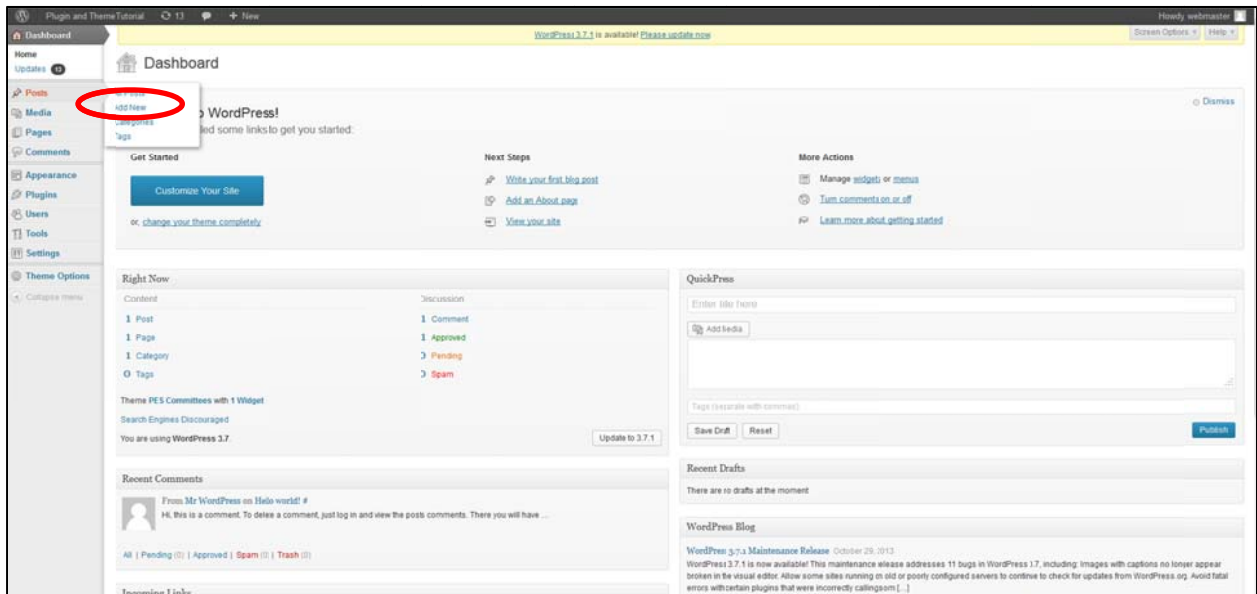


27. Set “Reading Settings” to “A static page (select below).” This will be your main page to type content or add pictures. If you set it to “Your latest posts,” the picture carousel will not show correctly. Remember that it needs to be a “page” not a “post” for the “Front page:” drop-down. Click the “Save Changes” button when finished.

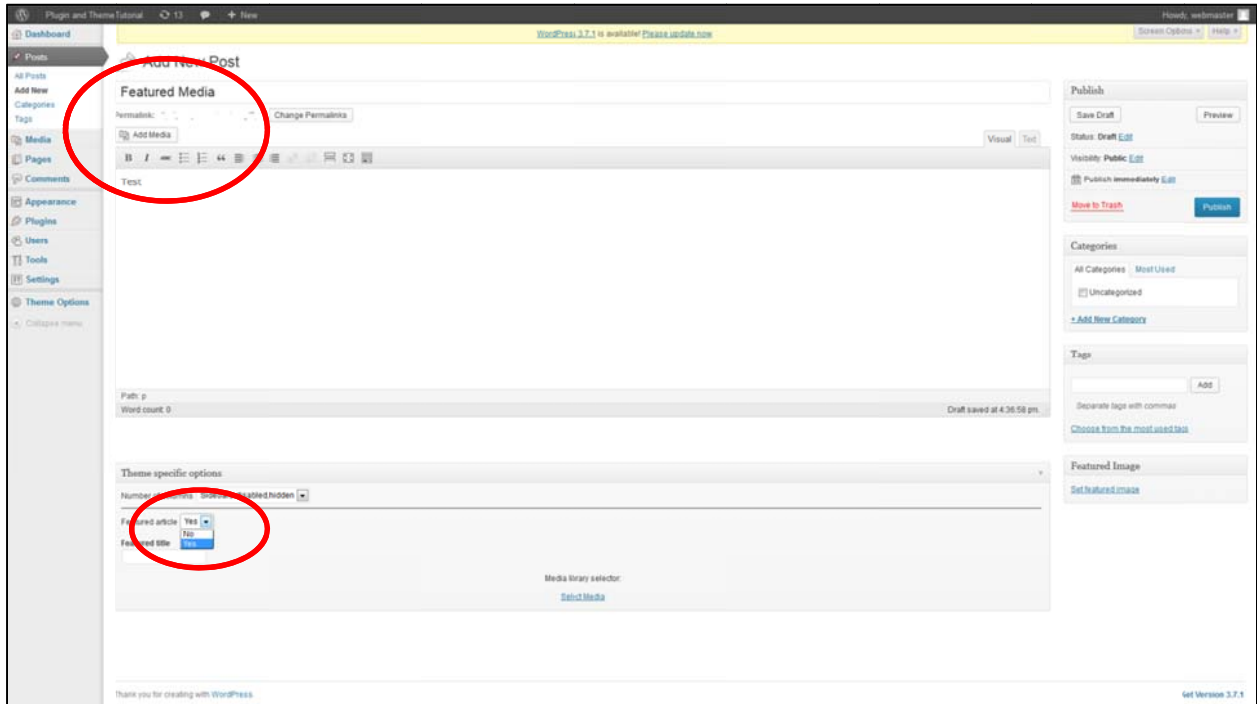


Adding Pictures to the front page Carousel

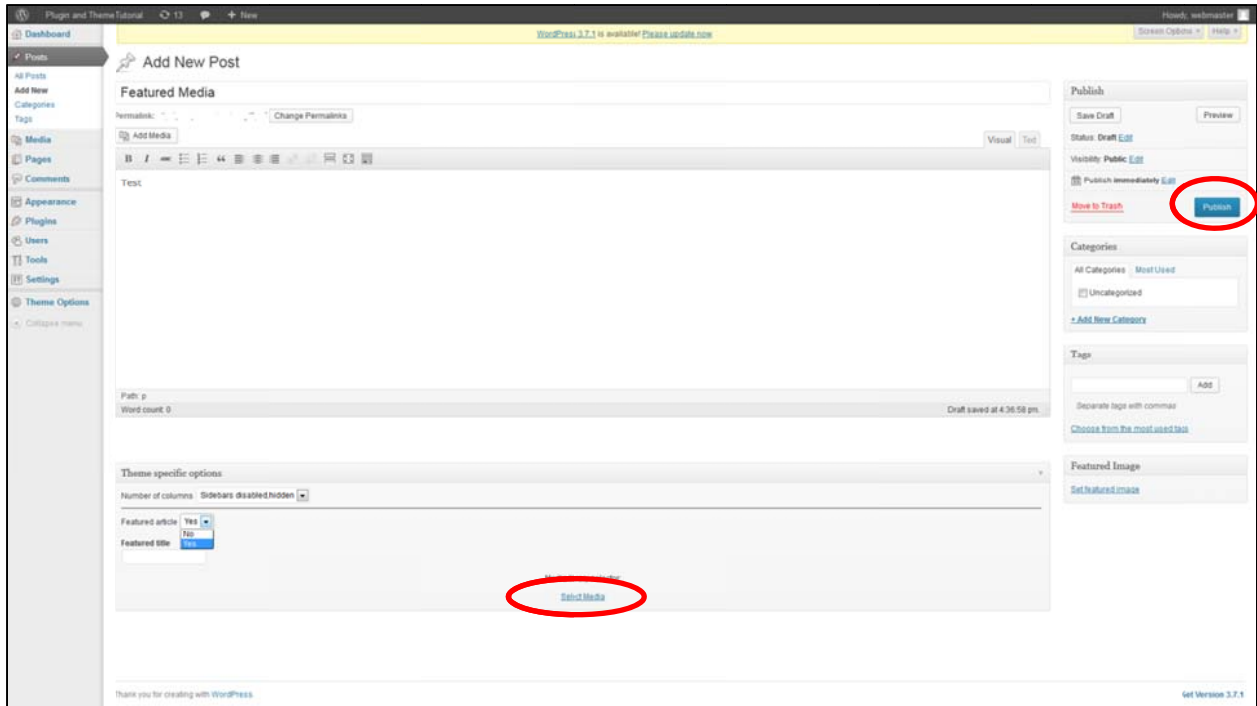
28. Add a new post for the picture carousel.



29. Title your post, write content, and select “Yes” for “Featured article” in the drop-down.

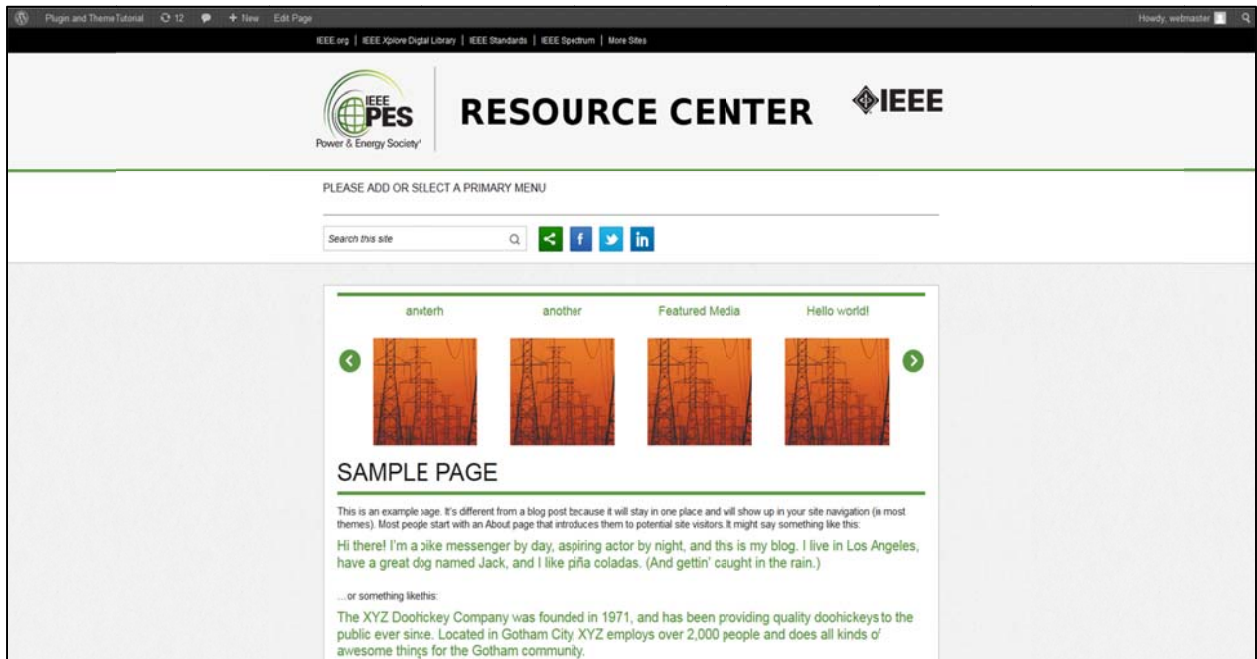


30. Next, click “Select Media” and upload a 160 x 150 pixel image. The image scroller area on the front page will contain 4 images and when the scrolling arrow is clicked, another single image will appear. Click the “Publish” button and an image linking to the article should appear on the front page.

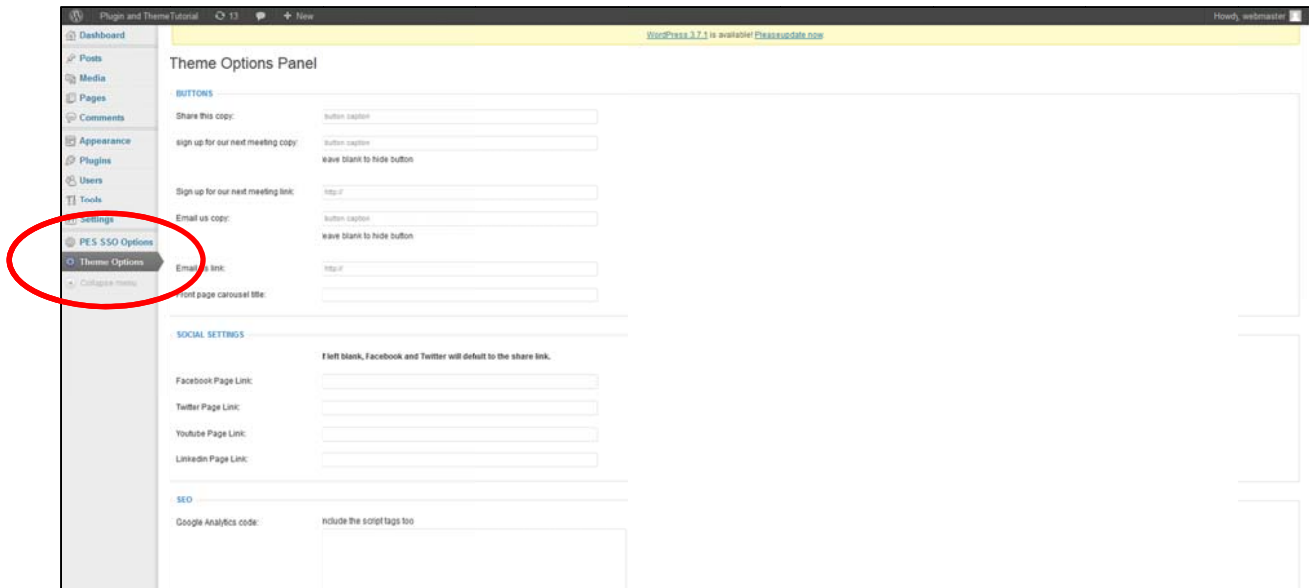


31. Repeat step 29 a minimum of 3 times.

Your site should look similar to the following:



For social media settings, navigate to the following page: Theme Options



If your chapter or committee does not have social media accounts, please use the following PES social media links instead:

Facebook: <https://www.facebook.com/ieeePES>

Twitter: https://twitter.com/ieee_pes

YouTube: <http://www.youtube.com/ieeepes>

LinkedIn: <http://www.linkedin.com/groups/IEEE-Power-Energy-Society-3792736>

32. You are now ready to build out your web page. If you are not familiar with WordPress, please see the Web Editors Guide (<http://sites.ieee.org/files/2011/04/WordPress-Editors-Guide-WL.pdf>), which explains how to create and edit pages, images menus and use other features.

33. Visit the IEEE PES [Webmaster Resources](#) page for further updates, including instructions on how to add **Responsive Design CSS** code to make the IEEE PES theme display better on smartphones, tablets and mobile devices.

34. Good luck!