Website update tutorials for HealthSourceRI.com

**Contents:**

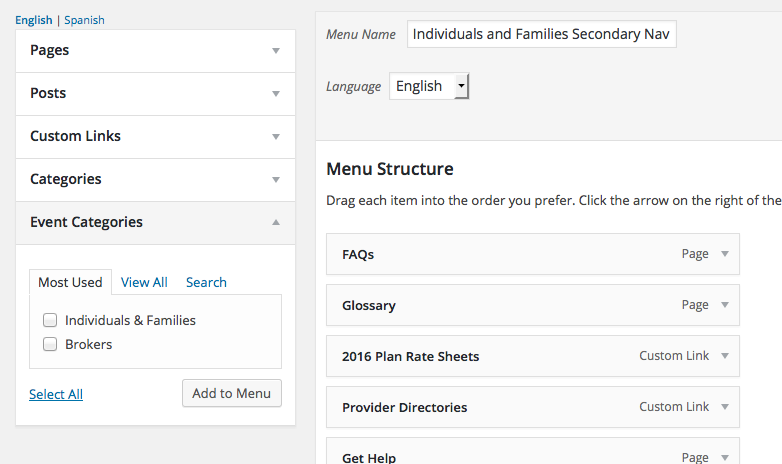
* How to add an item in the 'Related Item' box
* How to update Rotating Marquees
* How to change language in footer/add new content
* How to add/change news and excerpts in the orange box
* How to change the hours in the header
* How to change/edit the Get Help Drop down menu
* How to add a new Resource and how to make it visible on a page
* How to edit or add an FAQ
* How to edit or add a press release
* How to edit/add new copy to a page
* How to edit Spanish site
* How to format/layout text/do any text treatments to posts/pages
* How to make an icon/text/logo clickable to a link/url
* How to change the smaller icons/reposition them on top of internal pages (Learn; Find a plan etc.)
* How to change calculator URLs
* How to edit title of help drop down
* How to create new content boxes
* How to edit footer icon plan type text
* How to reformat the health insurance icons/logos
* How to create new email address within Godaddy
* Downtime messaging

**How to add an item in the 'Related Item' box**

Go to appearances--- Menus

Select a menu to edit. Example: Individuals and Families secondary nav.

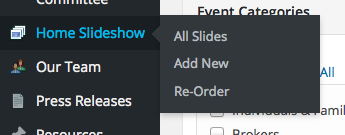
To add an item, either select a page under “pages” or “add a customer link” and press the button “add to menu”



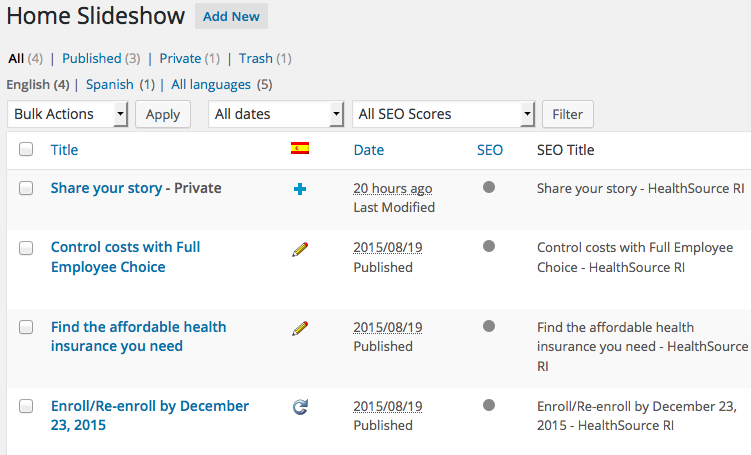
**How to update Rotating Marquees**

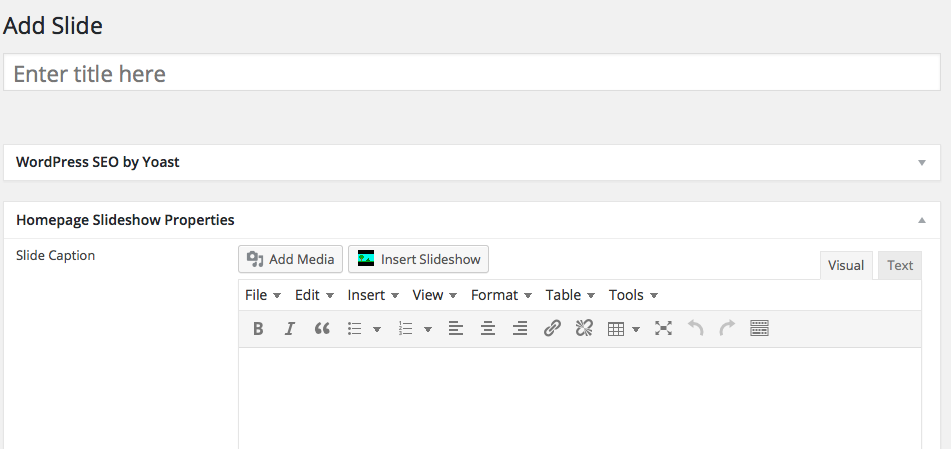
First, check to see if you are editing the marque on the main page or the marques on the individuals/families or Employers page.

If you are **editing the marque on the home page**, navigate to “Home Slideshow” and select “all slides.”

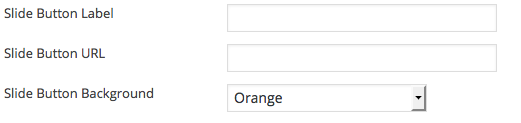


To add a new slide, click the “add new” button. To edit a current slide, click on the title.

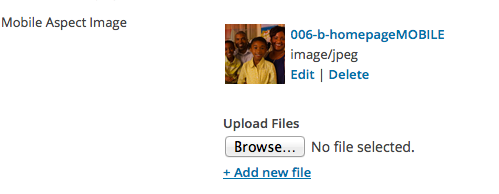




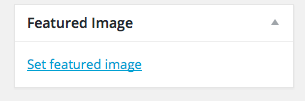
Edit the slide or enter text in the new slide the way you would for any post. To edit the text, link and color for the “learn more” button, scroll down the page and fill out these fields.



Scroll down to set the photo for the mobile version of this marque under “mobile aspect image”

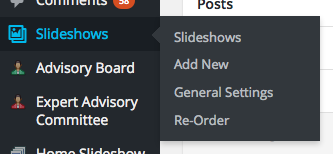


To add or edit the background photo, scroll all the way down the page and select the box on the right hand side that says “select featured image”



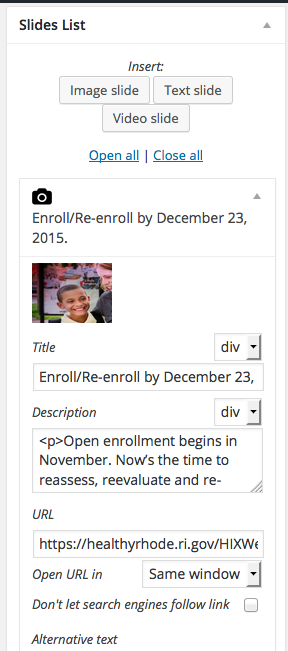
Be sure you select an image with the right dimensions for the marque or it will look strange.

If you are **editing the marque on the individuals/families page or the Employers page**, navigate to “Slideshows” and select “slideshows”

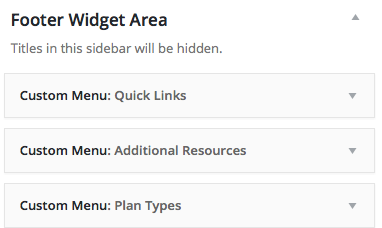


Select either Individuals/Families or Employers/brokers

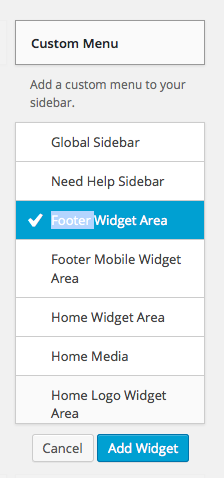
Scroll all the way down and look to the right. The individual slides are in the side bar under “slides list.” The text for the slides are under “title” and “description.” Be sure to maintain the html code if you add new text. To add a new image, you have to create a new slide. Click insert “image slide” to start a new one. Copy and paste the old text into this slide or at least copy and past the code.



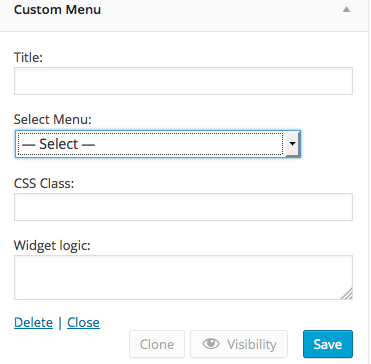
**How to change language in footer**

Navigate to “appearances” and select “widgets” Click on “footer widget area.” 

To edit existing text, just click on the titles. To edit the content in the menus, go to appearances-menus. To add items, go to the “available widgets” side of the page. You will usually be adding a “custom menu” or “text” (scroll down to find “text”). Once you open the type of content you want, select where you want the new text or menu to appear. In this case for the footer, you select “footer widget area”

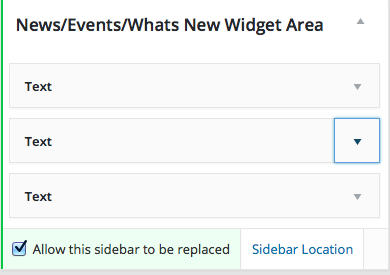


The new menu/text box will now appear in the footer widget area. Click on it to add the content you want. For a new menu, you will have to create the menu first in appearances—menus. Once it’s created, you’ll select it from the drop down. Be sure to click save when you are done.

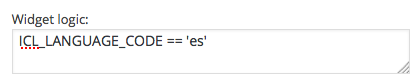


**How to add/change news and excerpts in the orange box**

The orange news/events box is another widget. Go to appearances- widgets and scroll down to find “ news/events/whats new widget area”



The first “text” box has text for the Spanish orange box, the second is for individuals and families and the third is for employers. When you open each box, there will be text inside of html code. To designate the correct page, edit the widget logic.



**For Spanish,** use- ICL\_LANGUAGE\_CODE == 'es'

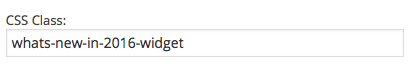
**For individuals and families**, use-

global $post; return !is\_page('employers') && !(in\_array(3126,get\_post\_ancestors($post))) && ICL\_LANGUAGE\_CODE == 'en';

**For employers** use-

global $post; return is\_page('employers') || (in\_array(3126,get\_post\_ancestors($post))) && ICL\_LANGUAGE\_CODE == 'en';

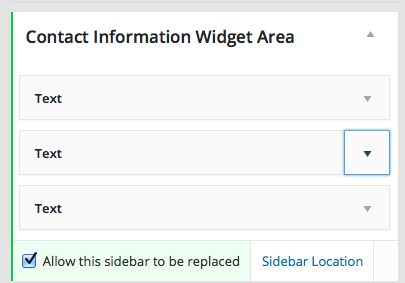
Employers box should also include this text in the “CSS Class” field- whats-new-in-2016-widget



**How to change the hours in the header**

Navigate to appearances- widgets and click on “contact information widget area”

The first text box is for the individual/family hours, the second text box is for the hours/days in Spanish. The third text box is for the hours on the employers pages.

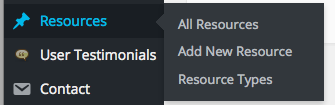


**How to change/edit the Get Help Drop down menu**

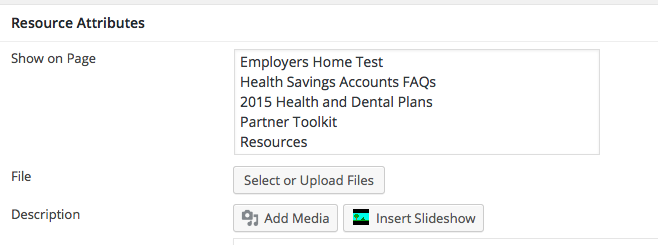
Navigate to appearances- widgets and click on “Need help sidebar”. You can edit text or add new items. See instructions for “how to add language to footer” for more details.

**How to add a new Resource and make it visible on a page**

To add a resource, navigate to resources—add a new resource

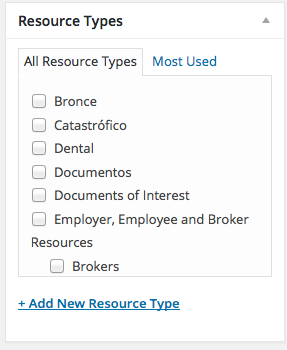


Enter the title and any description of the resource and select where you want the resource to appear in the box “show on page.” To show on multiple pages, use the command key to select more than one. Note that the individuals and families resource page and the Employers resource page are both called “resources.” The top “resource” on the list is employers and the 2nd “resources” on the list is for families.



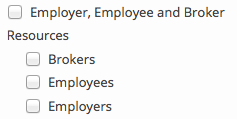
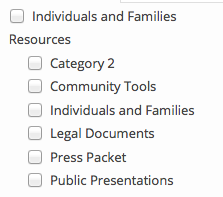
Click the “select or upload files” button to add the document

Once you’ve added your resource, be sure you give it the correct category. Navigate over to “resource types” and click the type of resource you have. This will determine both the formatting of your resource and where is appears.

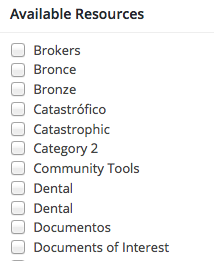


For FAQs, select “FAQ” for type. For password protected items for the partner toolkit, select “partner toolkit.”

For individuals and families, be sure to pick a subcategory so it appears in the right drop down on the resources page. For employers/brokers/employees be sure to pick the correct subcategory as well. Those subcategories right now look like this-



If your resource doesn’t appear on the page you selected, be sure to make sure that page has your “resource type” enabled. You can check that by going to the page where the resource should appear, pressing “edit” and scrolling down to the bottom. On the left hand side you’ll see a list of “available resources.” Be sure your “resource type” has a check mark next to it.

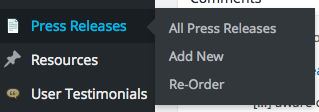
If your resource is appearing twice, it could be because you have both the main resource type and your specific resource type enabled on the page. For instance, you’ve checked both “individual and families resources” and “ individuals and families” as available resources. You only need to have the “parent” or main category clicked for the resource to appear.

**How to edit or add an FAQ**

FAQs are considered resources, so you add them the same way you’d add any other resource. Just be sure to label them as FAQs under “resource type.” To edit an FAQ, just search for it under “resources.”

**How to edit or add a press release**

From the dashboard, go to press releases--- add new. Type in title and content and press publish. To edit a press release, go to press releases--- all press releases.

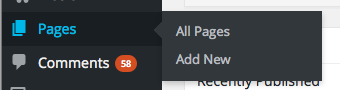


**How to edit/add new copy to a page**

Once you are logged into the dashboard, you can navigate to any page on HSRI and click on “edit page” on the top header bar. This will take you to the content you want to edit.



You can also go to pages--- all pages from the dashboard and search for the page you want to edit.



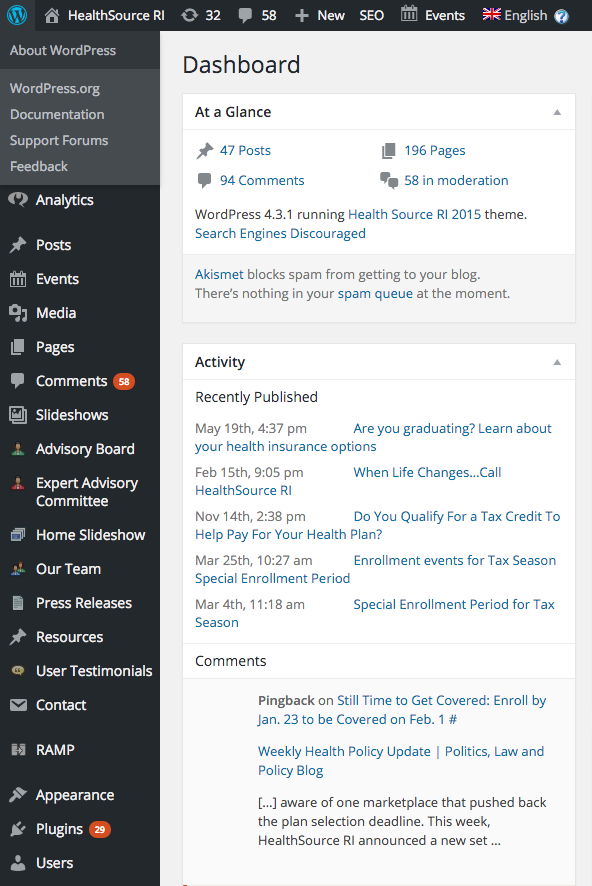
**How to edit Spanish site**

Start by going to the dashboard and going to the top header bar. Click the English flag and change it to a Spanish flag. From here, navigate to the pages or widgets you want to edit.



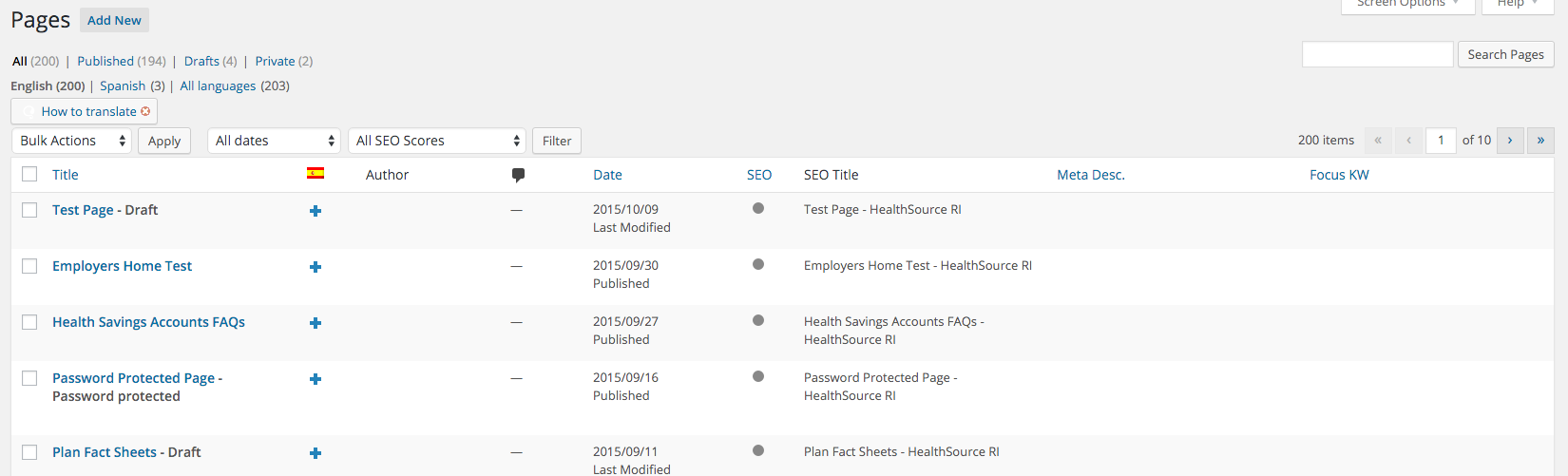
**How to format/layout text/do any text treatments to posts/pages**

Start by going to the dashboard. Then click on Posts or Pages depending on what you would like to edit.



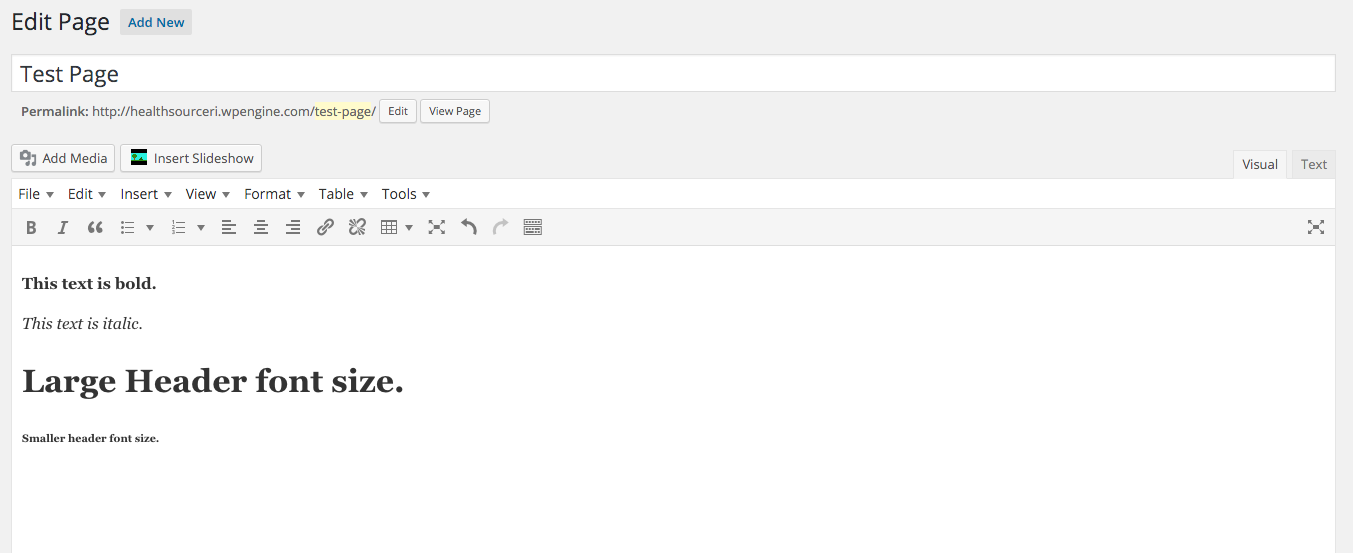
*--Dashboard*

Find the Page that you would like to edit in the Page listing and click this Page to begin editing it.

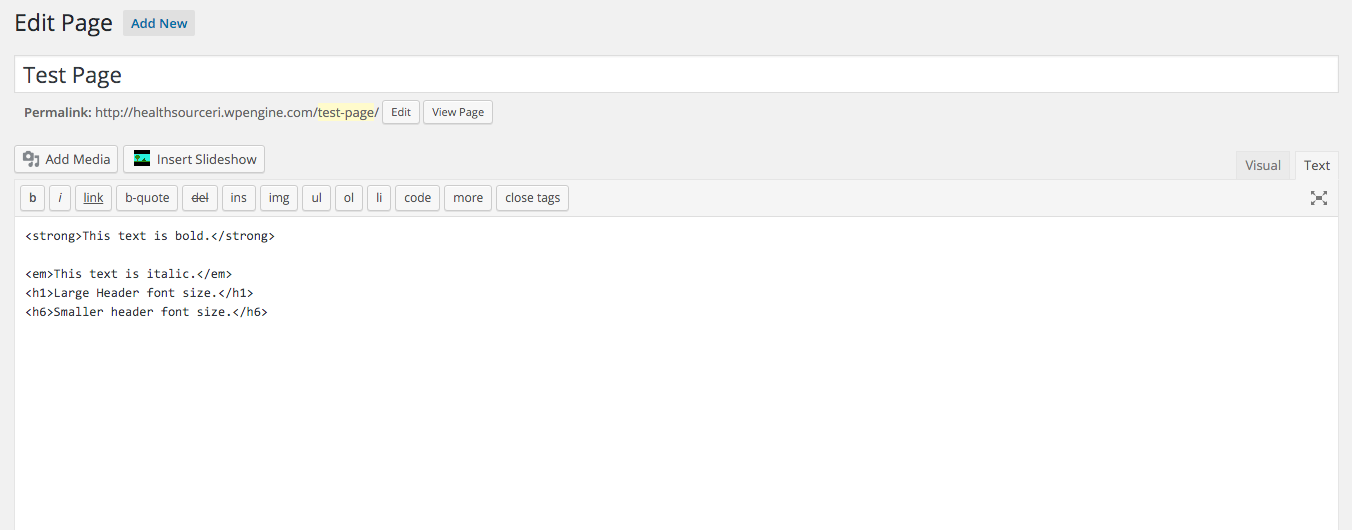


*--Page Listing*

There are two ways to edit a post or page. You can use the Visual Editor, or the manual HTML text editor. If you edit the post or page via the Visual Editor, then switch to the manual HTML text editor, you can see the resulting HTML which you can then copy and paste into a Plaintext Widget if so desired. This is a good way to generate HTML. Make sure that if you want to copy anything from a post or page, that you toggle the Text mode and copy the contents from here instead of from the Visual mode.



*--Visual Editor*



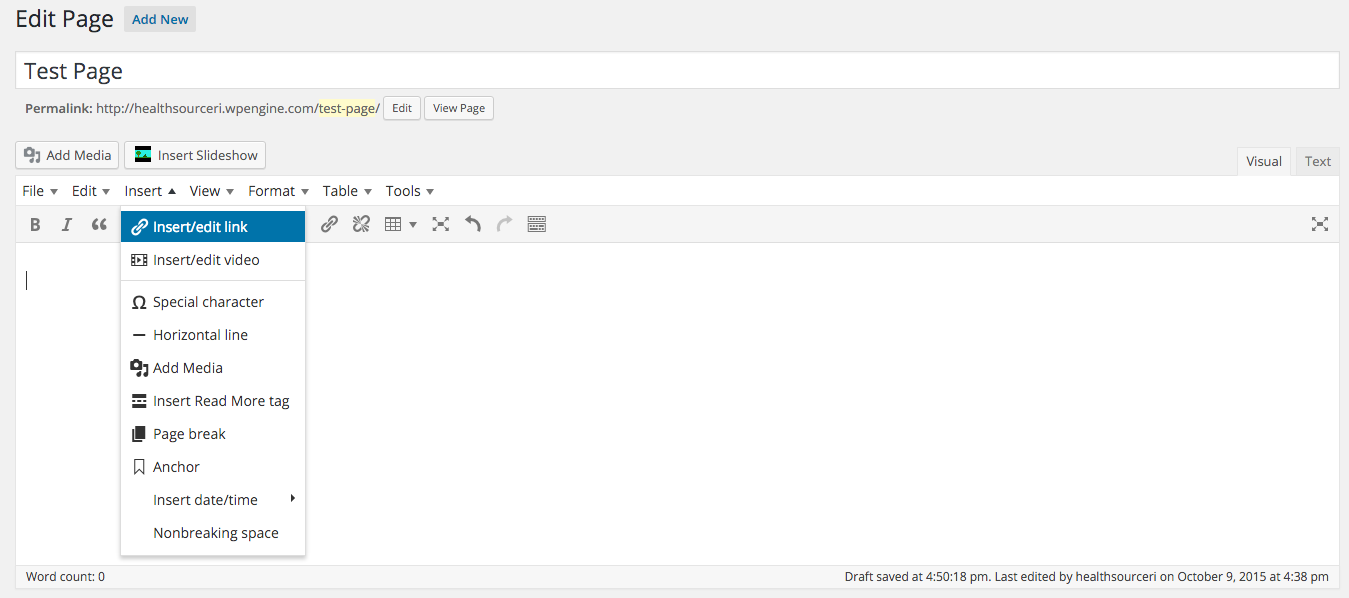
*--Text Editor*

**How to make an icon/text/logo clickable to a link/url**

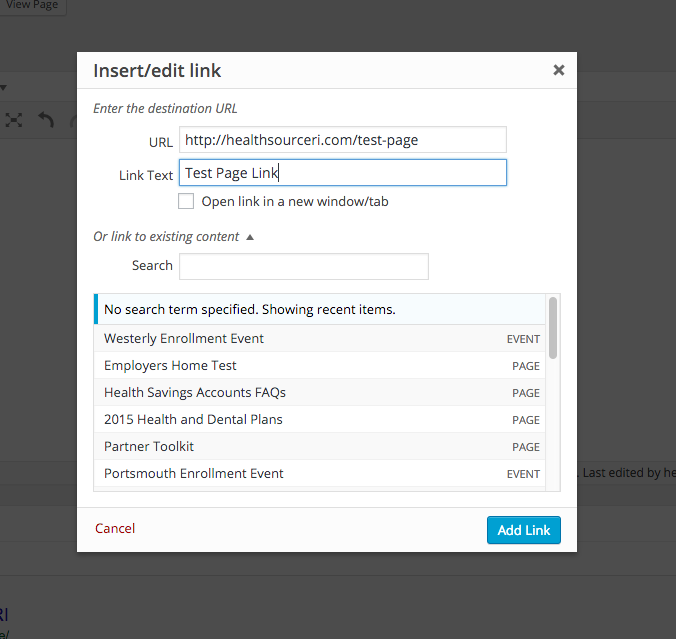
First navigate to the dashboard, then to the post or page listing depending on what you would like to edit. Find the post or page you would like to edit, then open the Visual Editor.

**Text Link/URL**

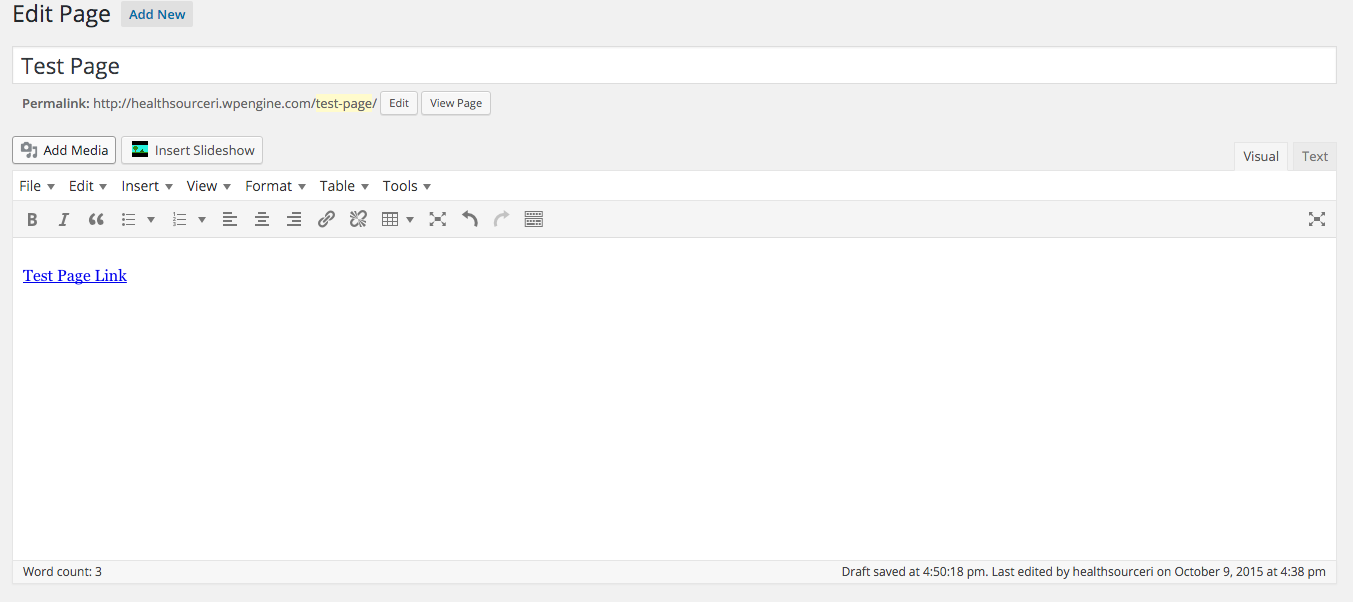
Use the Insert Link/URL from the Insert Dropdown to generate the Text Link/URL. Once you have generated the desired Text Link URL then you can toggle the Text Editor to see the resulting HTML. You can then copy/past this resulting HTML in the desired location in other areas on the site like a Plaintext Widget.



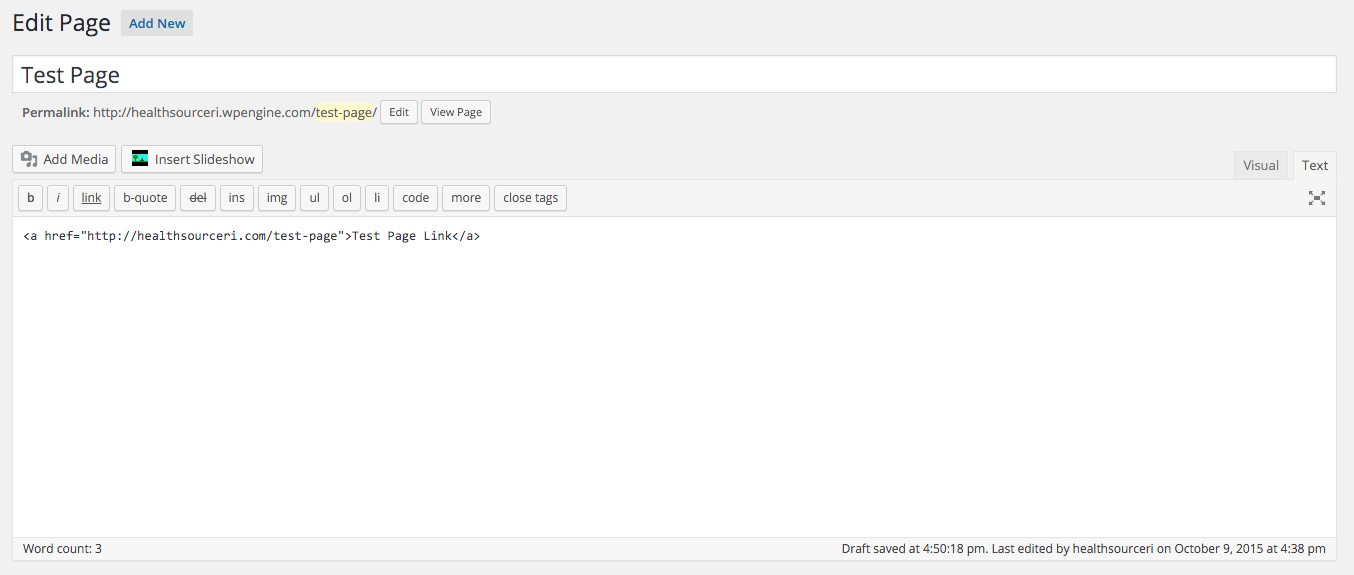
*--Insert dropdown menu*



*--Adding the link attributes*



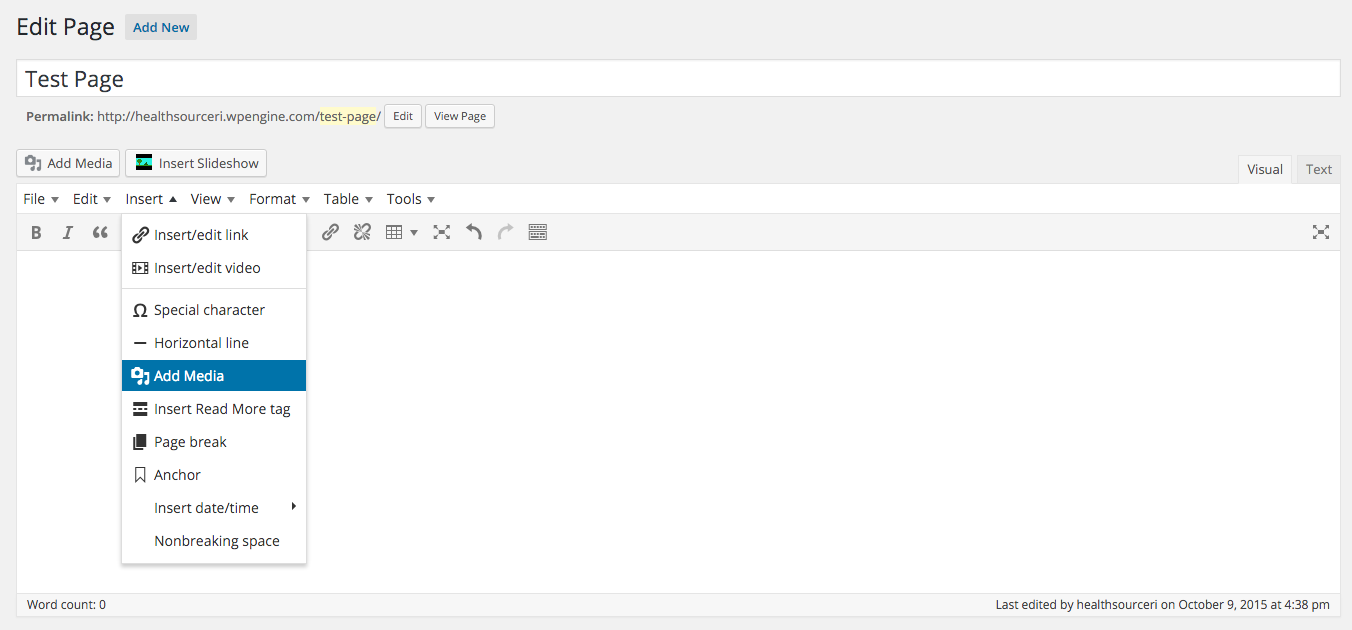
*--Link has been added to the Visual Editor*



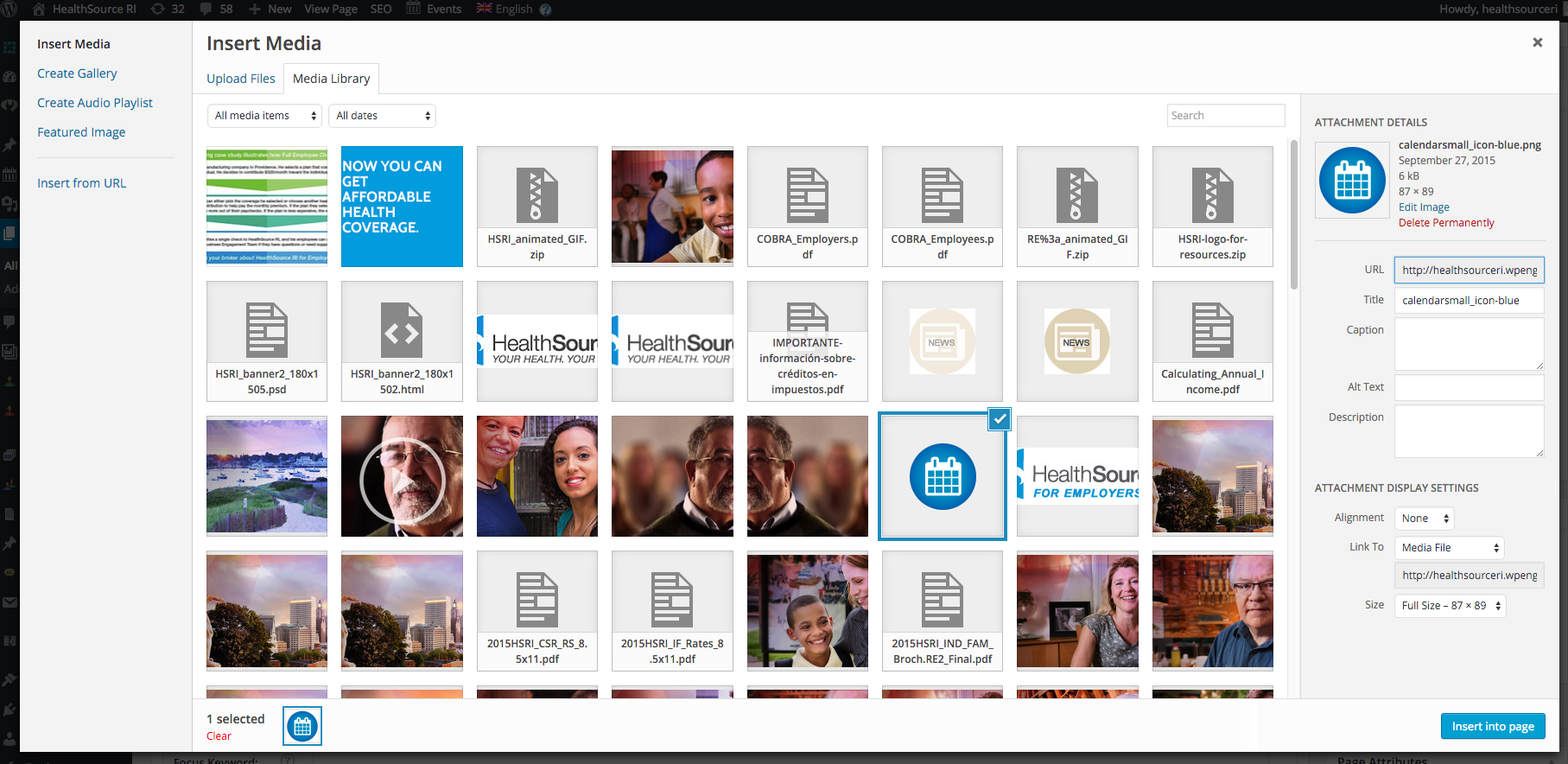
*--Text Editor has been toggled to see the resulting HTML*

**Icon Link/URL**

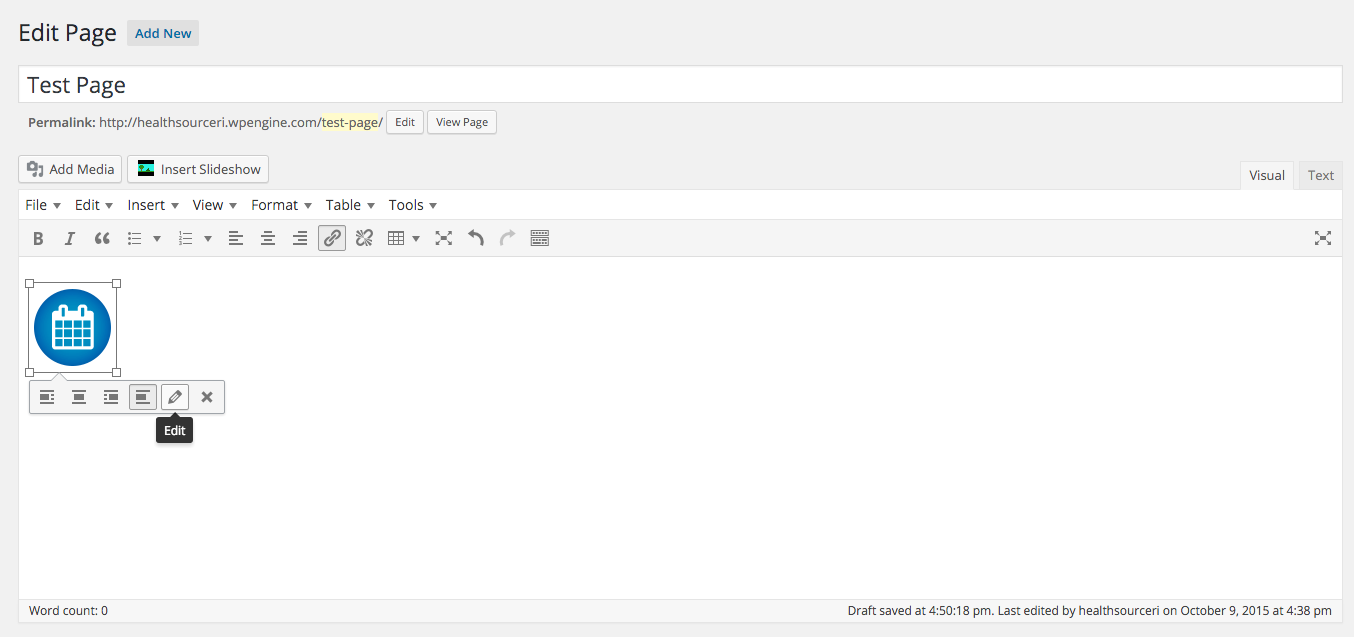
Use the Insert Add Media from the Insert Dropdown to generate the desired Media image/icon. Once you have generated the desired media/image then you can toggle the Text Editor to see the resulting HTML. You can then copy/past this resulting HTML in the desired location in other areas on the site like a Plaintext Widget.



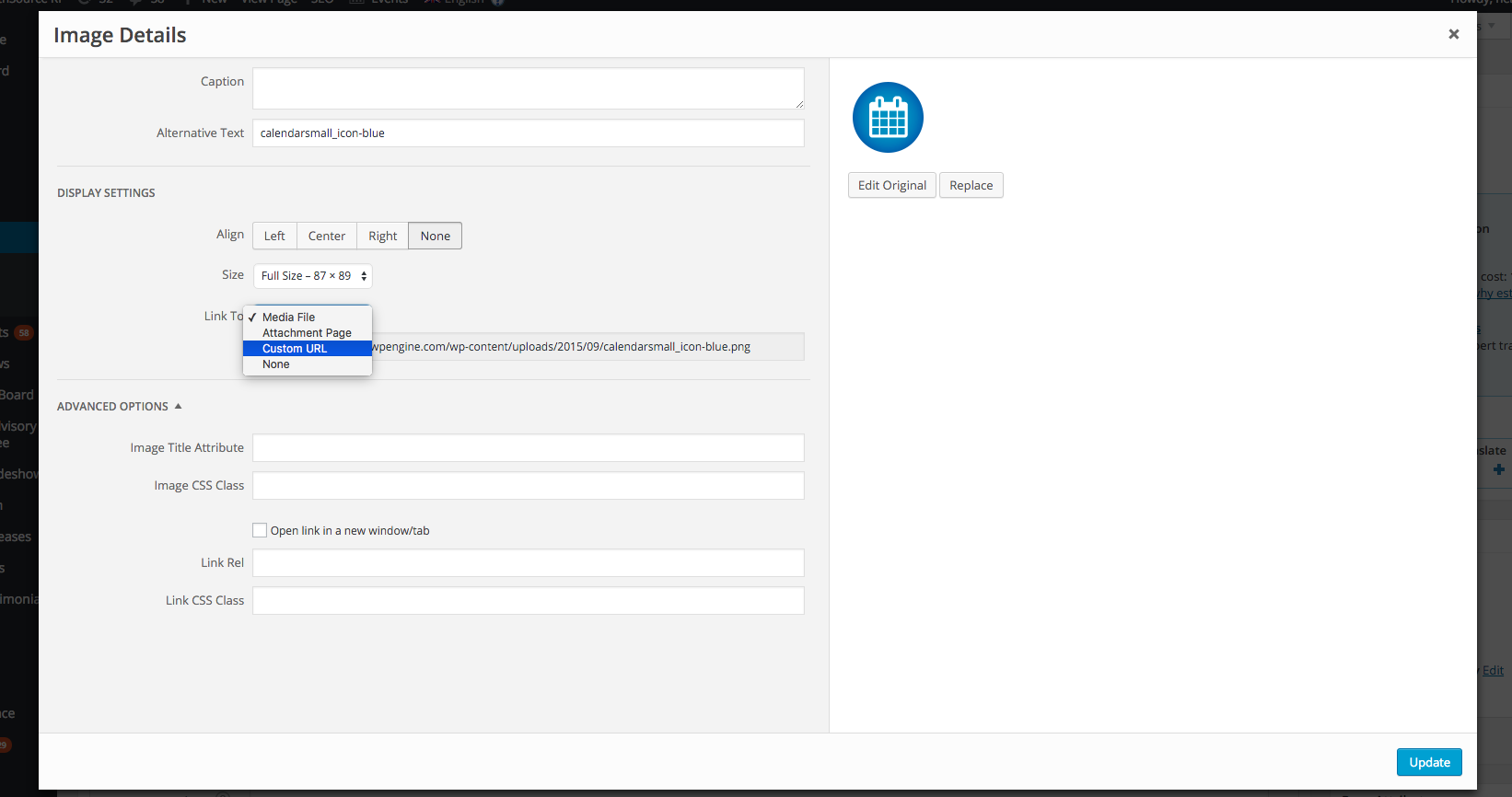
*--Add Media dropdown*

**

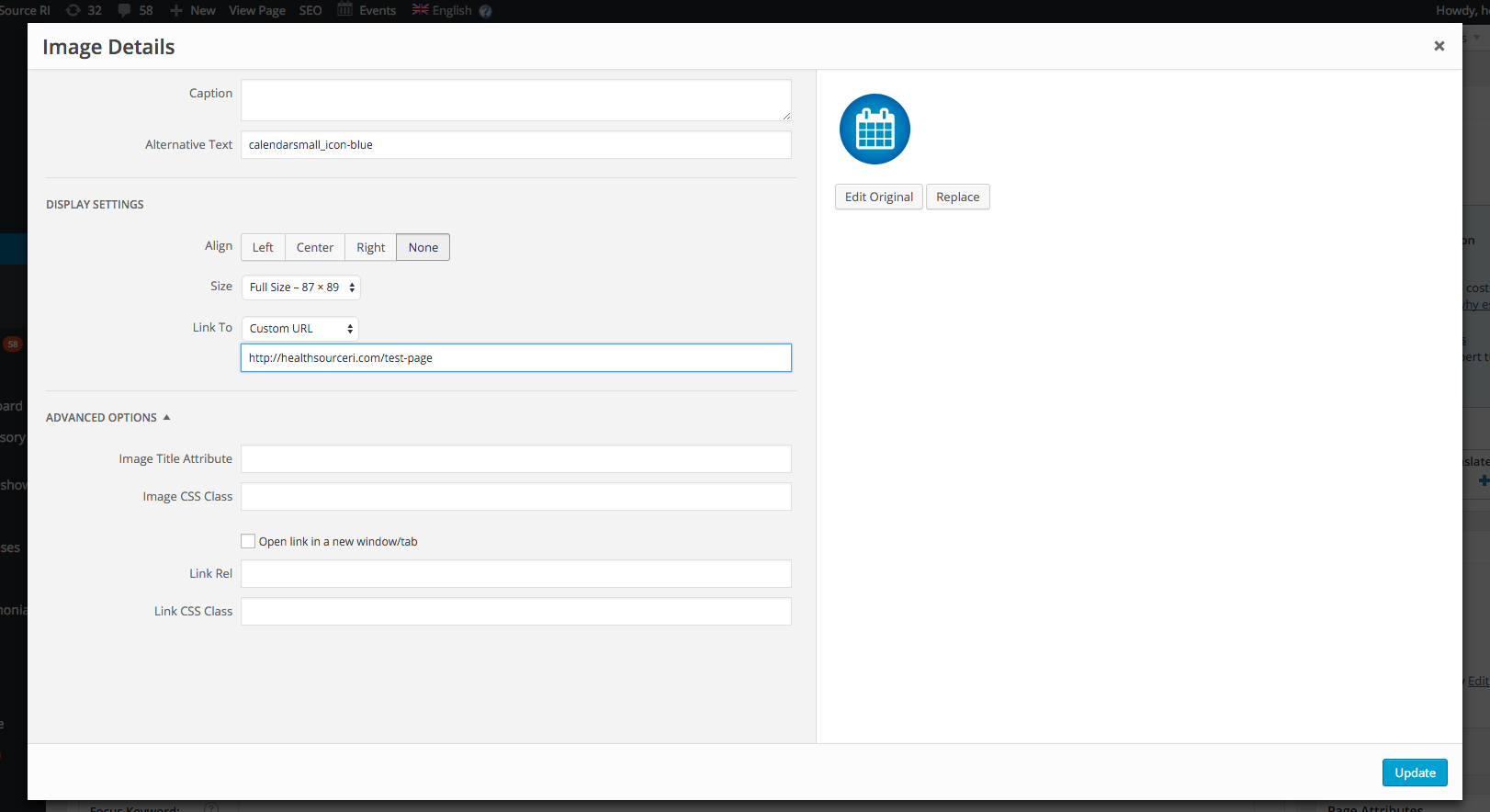
*--Select desired media*

**

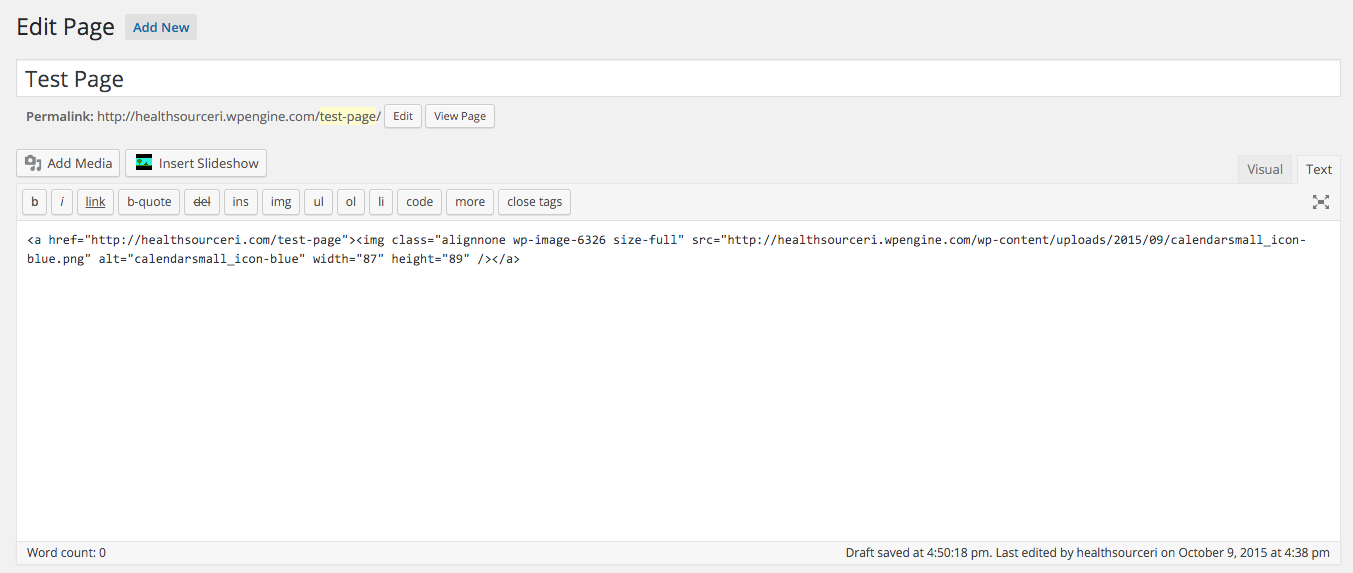
*--Edit the media to add the Link/URL attribute*

**

*--Change the Link URL/Text to the desired location*

**

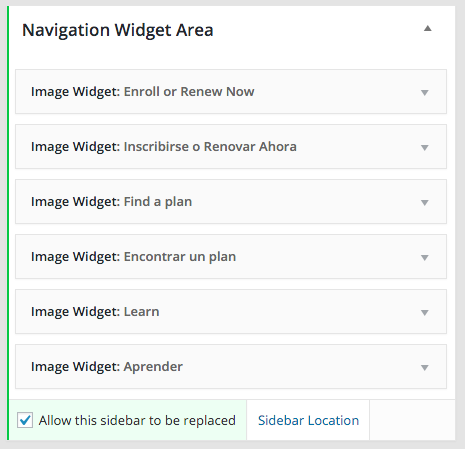
*--New URL in place*

**

*--Once you have created the Visual portion in the Visual editor, then toggle the Text editor to see the resulting HTML*

**How to change the smaller icons/reposition them on top of internal pages (Learn; Find a plan etc.)**

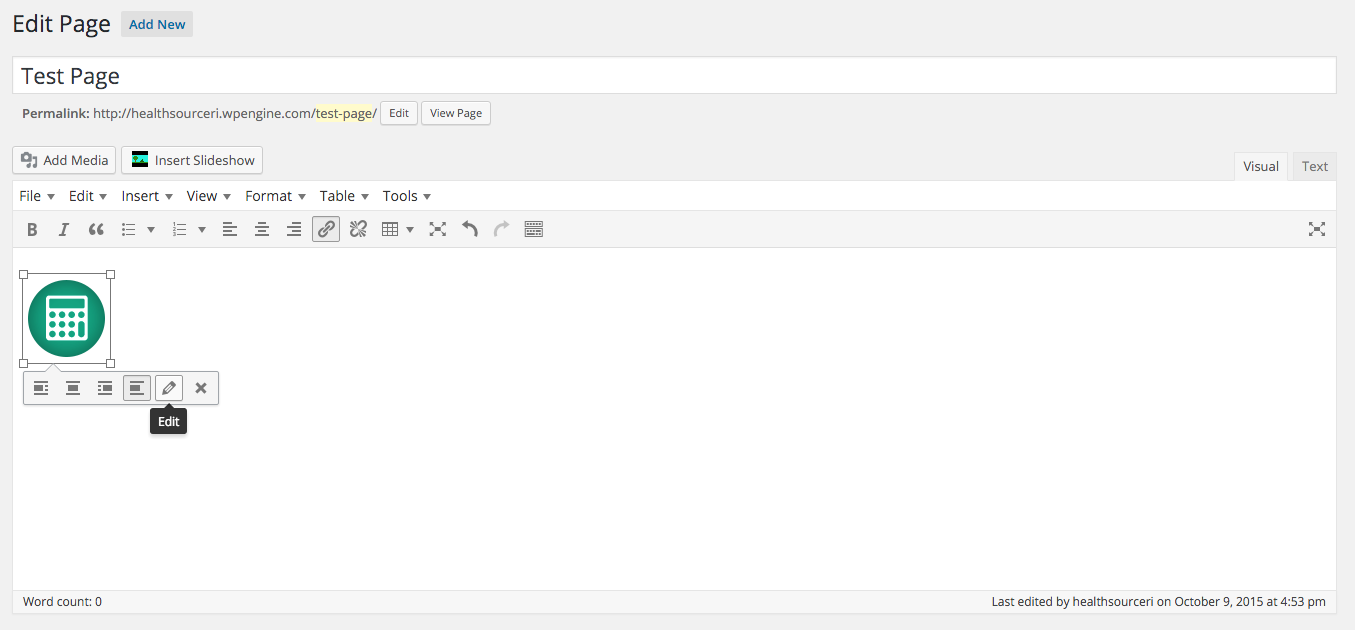
To change the position of the icons for internal pages you can re-order them by dragging and dropping them in the order that you desire. In this instance, navigate to the Appearance->Widgets section, then locate the “Navigation Widget Area.” Hover over the Item you would like to re-order, click and hold, then drag and drop to re-order. The order will automatically re-save once you let go of the item in its new place.



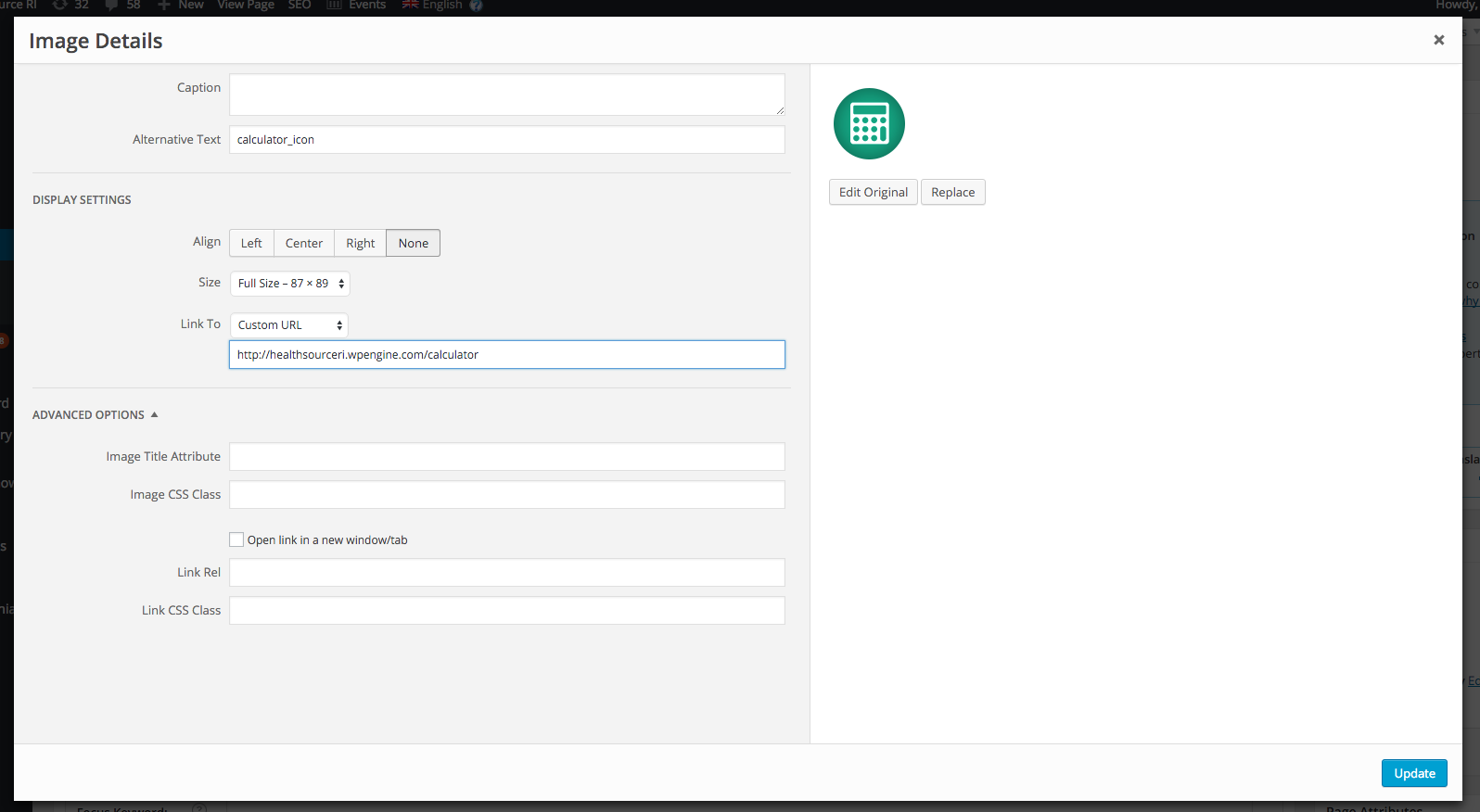
**How to change calculator URLs**

Depending on if the calculator URL is in a page or widget you will have to edit the item in its respectful location.

If the URL is in a page then find the page in the page listing, edit the page, find the URL in the text content for that page and use the Wordpress Visual editor to change the Link/URL attributes.

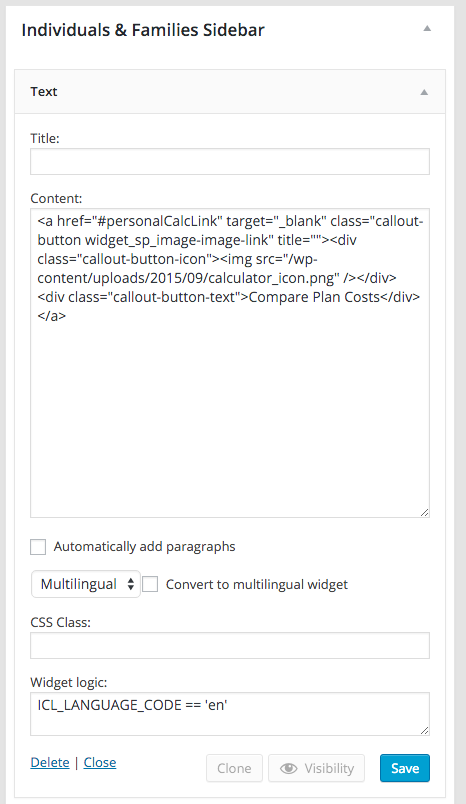
****

*--Edit the media resource in the respectful page*

****

*--Edit the media resource link attributes*

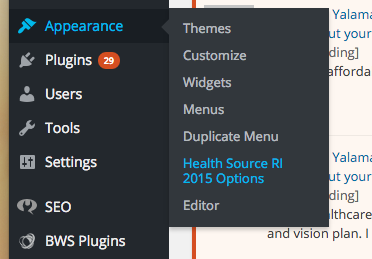
If the URL is in a widget, then find the page in the Widget Area it is located. Edit the widget URL settings.



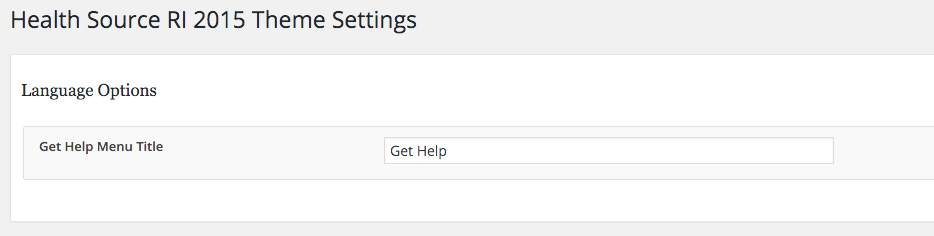
*--Find the widget, then edit the “href” parameter in the widget text to contain the new URL.*

**How to edit title of help drop down**

To edit the title of the help drop down navigate to the Appearance->Health Source RI Theme options area. The title of the help dropdown is in the Language section. Update the desired Language, then save the new settings. Please note that after saving the new language you will have to update the translations for this in the WPML String Translation section.



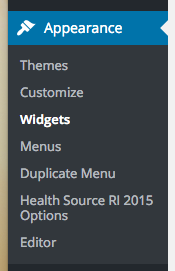
*--Health Source RI Options*

**

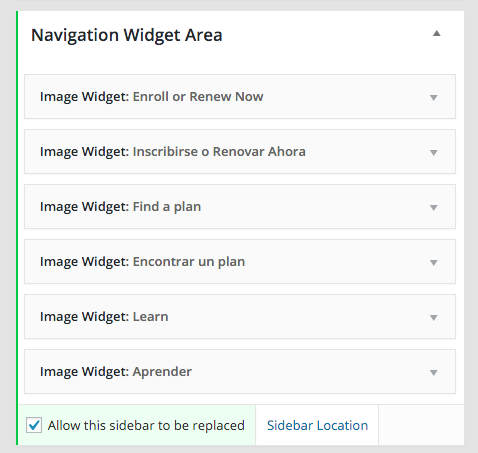
*--Health Source RI Language Options*

**How to edit and add icons**

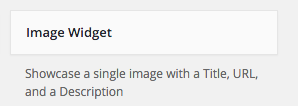
The Learn, Find a Plan, and Individuals and Families icons are located in the Navigation Widget Area. This area is located in the Appearance->Widgets section. If you want to add new Icons, then click and drag the Image Widget from the Available Widgets on the left to the Navigation Widget Area on the right. After doing this, you will be able to select the desired image icon and assign it a label and URL. “Title” will be the label for the image and “Link” will be the URL/Link that the image links to.



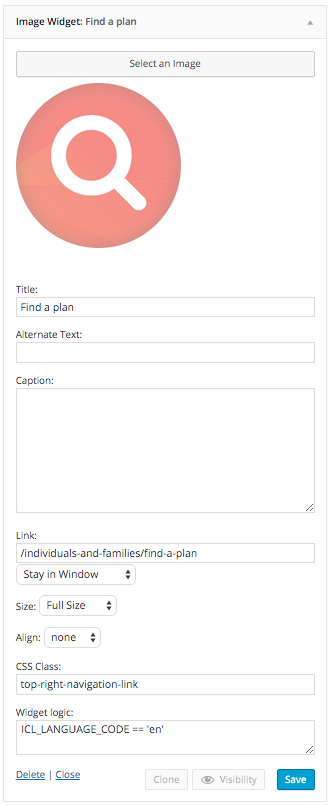
*--Widgets menu section*

**

*--Navigation widget area*

**

*--Image widget from the available widgets section on the left*

**

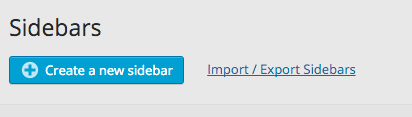
*--Widget attributes*

**How to create new content boxes**

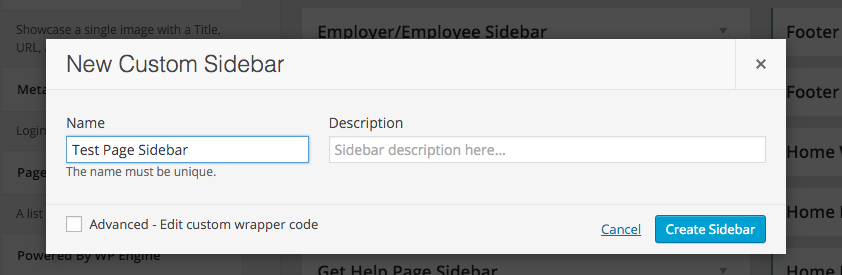
There are several types of content that can be added to pages. Follow the appropriate guide below for adding callout buttons, and related content menus, then add the content to the specific page.

**Callout buttons:**

To add a callout button to a page, first create a new Sidebar specifically for this page or desired pages. This is located within the Appearance->Widgets section. Name the sidebar appropriately for the page(s) it will be placed on.

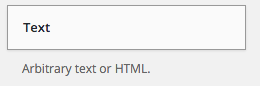


*--Button to create a new sidebar located on Widgets page*



*--New Custom Sidebar dialog*

Drag and drop an available “Text Widget “ from the left hand side into the new sidebar.

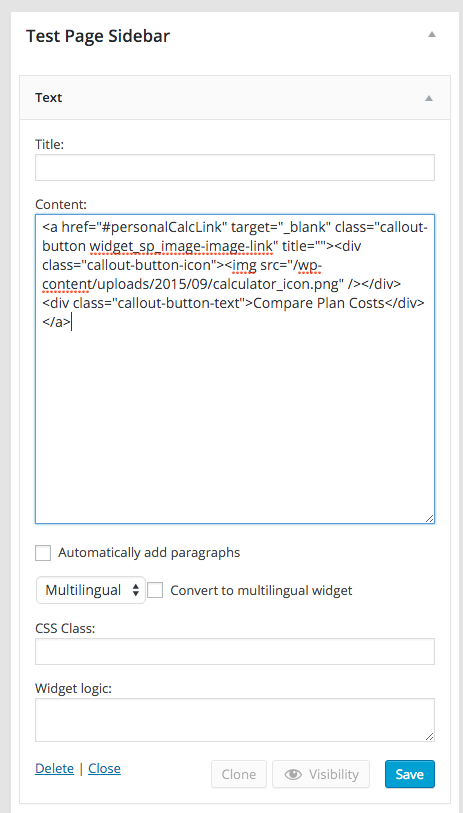
****

*--Available text widget*

After adding the new text Widget, copy and paste the HTML for callout buttons into a new “Text” Widget:

*Sample HTML (this can also be found by looking at existing callout button widgets):*

<a href="#personalCalcLink" target="\_blank" class="callout-button widget\_sp\_image-image-link" title=""><div class="callout-button-icon"><img src="/wp-content/uploads/2015/09/calculator\_icon.png" /></div><div class="callout-button-text">Compare Plan Costs</div></a>

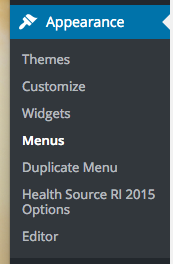
****

*--HTML Added for Callout Button*

Once you have added the HTML, then you can edit the Link/URL by editing the “href=” value, the Link Text, and the Link Image/Icon by editing the “src=” value to existing Media URLs that have already been uploaded to Wordpress through the Media manager.

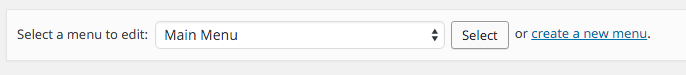
**Related Content Menu**

To add a related content menu to a page, first create a new menu within Wordpress specifically for this page(s) by going to Appearance->Menus then select “create a new menu.”

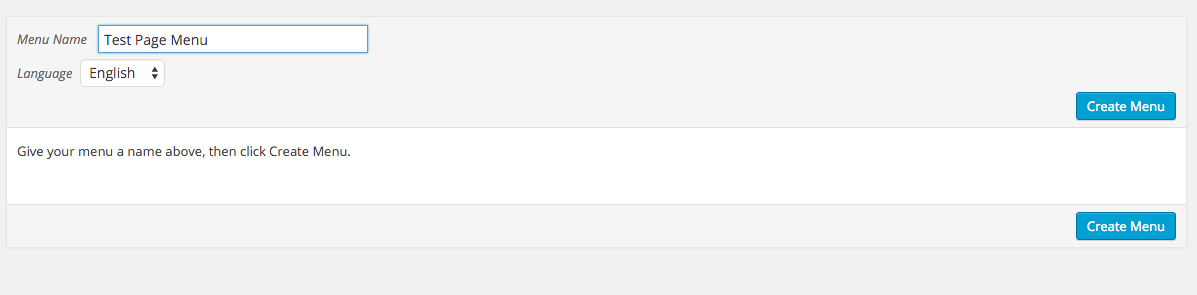


*--Appearance Menus section*

Name the menu, then click “Create Menu”. Now you can begin adding menu items desired for this page.

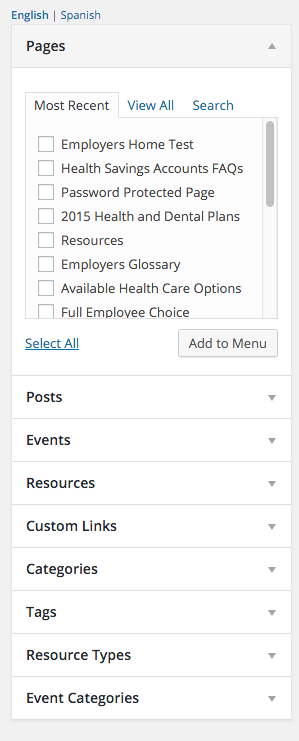


*--Create a new menu*



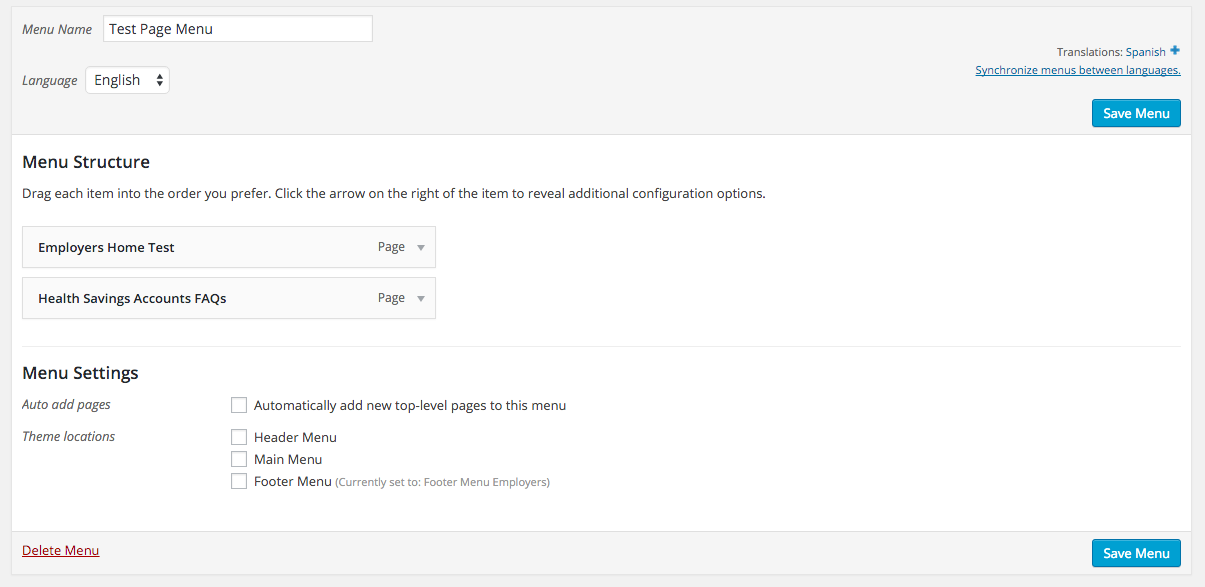
*--Test Page Menu is being named and created*

You can add pages or custom links by adding items from the left, under the different categories.



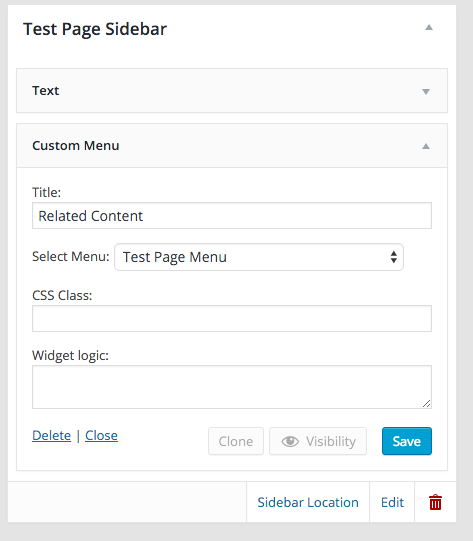
*--Available menu resources to add to menu*

Once you have added menu items then select “save menu.”



*--Menu items have been added to menu*

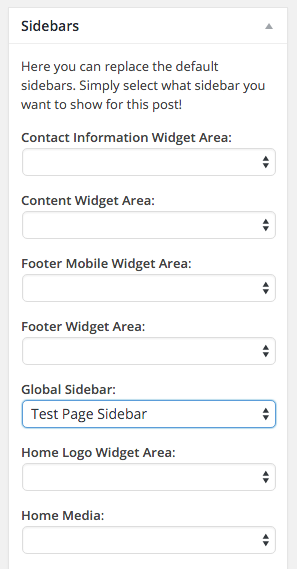
Go back to the sidebar created for this page and add a “custom menu” widget to this sidebar from the Available Widgets on the left. You will then see a dropdown to allow you select which menu the new widget should display.



*--Custom Menu has been added as a new widget, named, and the correct menu has been selected for display*

**Adding the Sidebar to the Page**

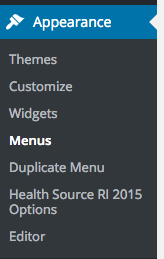
Open up and edit the page in order to assign the new sidebar to this page. You will see sidebar areas located along the right hand side of the page. Locate the Global Sidebar dropdown and change this to the new sidebar created above.



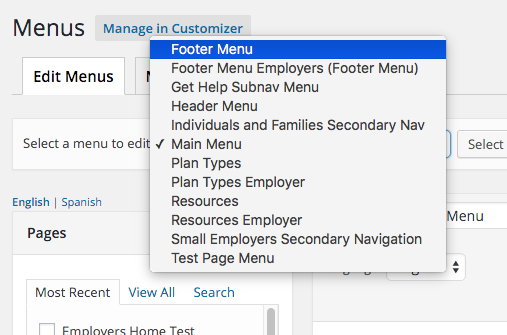
*--New sidebar being assigned to specific page*

**How to edit footer icon plan types text**

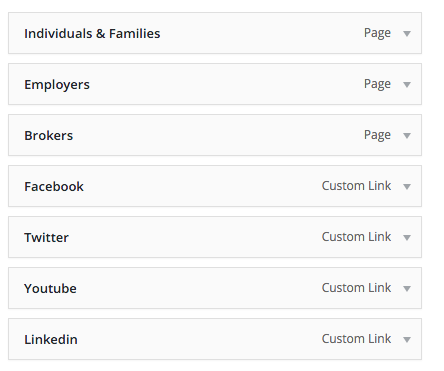
The footer icon plan types are a menu called “Plan Types” or “Plan Types Employer” located in the Appearance->Menu section. To edit this icon text, open up the menu in this section and edit the desired menu item to the new text.



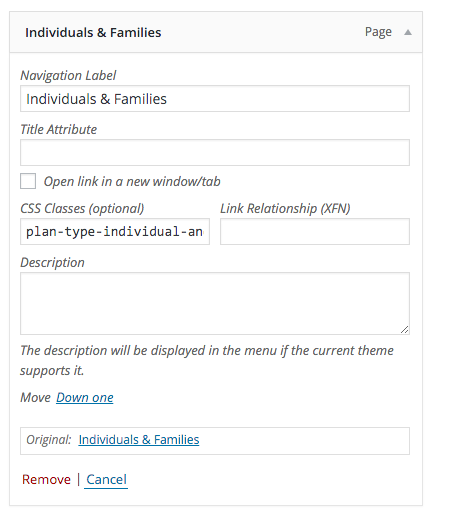
--Menu Section



*--Select the Plan Types Menu*

**

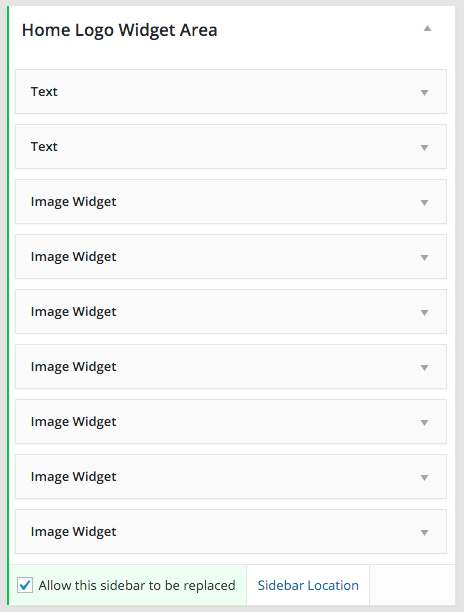
*--Rename the appropriate menu item*

**

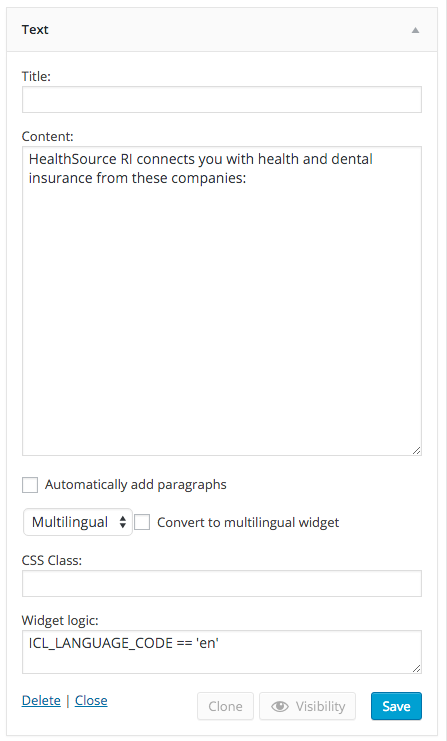
*--Change the navigation label and save the menu*

**How to reformat the health insurance icons/logos**

The health insurance icons/logos are located in a widget area titled “Home Logo Widget Area.” The first widget is simply the Text that displays above the logos. This is a plain text widget.

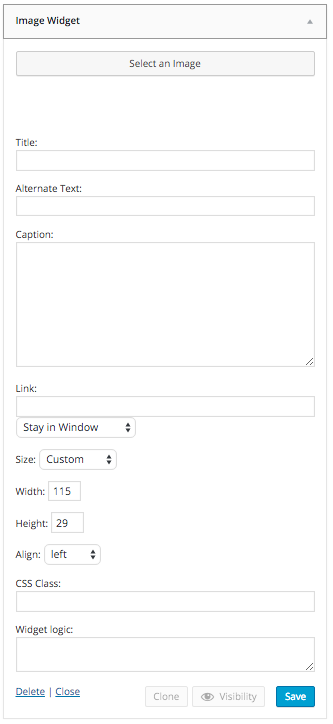


*--All widgets in the Home Logo Widget Area*



*--Plain text widget*

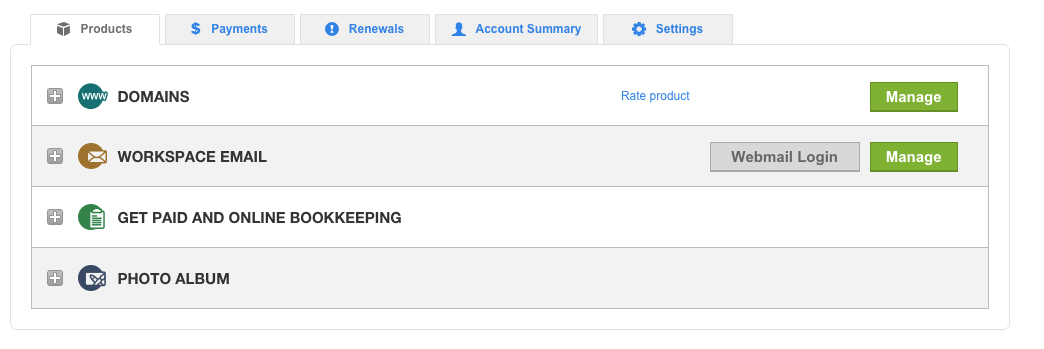
The other widgets are Image Widgets. To add new logos, drag an Image Widget from the Available Widget area on the left into the Home Logo Widget Area. Select the desired image from the Media gallery and resize appropriately. After adding the new image, re-order the widgets in the order you wish for them to appear.



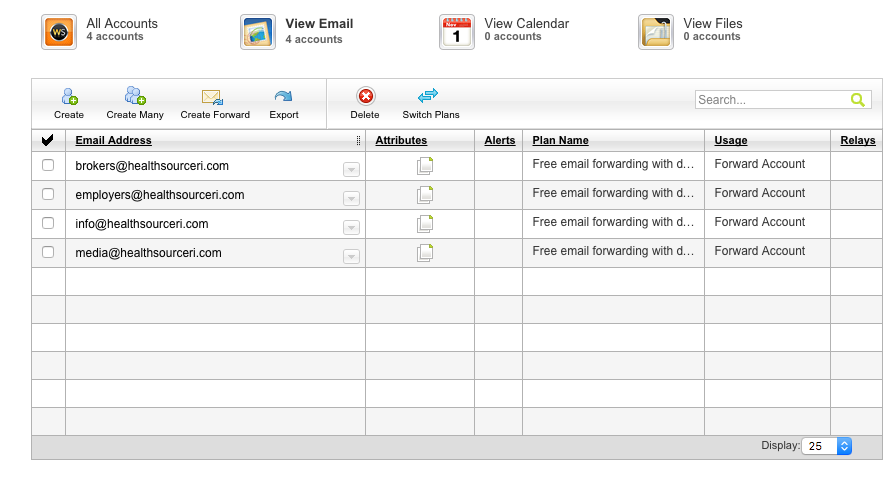
*--Image Widget added and attributes assigned*

**How to create new email address within Godaddy**

First log into Godaddy (login= [Maria.Tocco@exchange.ri.gov](mailto:Maria.Tocco@exchange.ri.gov) password: HealthSource4774, then navigate to the Email Addresses management section. This can be found by clicking “Manage” next to the Workspace Email section.

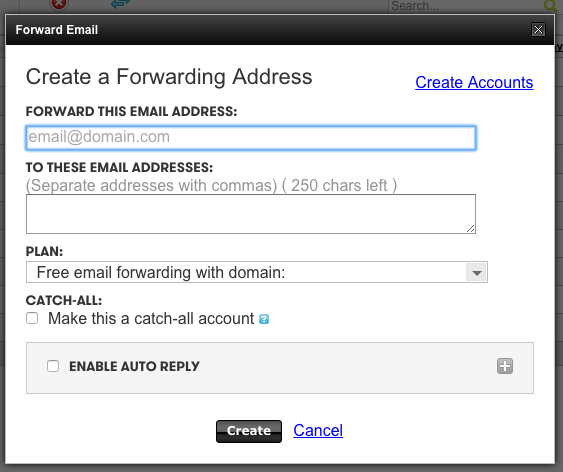


*--Main Dashboard*



*--Workspace Email management section*

Once you have navigated to the workspace email management section then you can begin adding forwarding email addresses. Select the “create forward” button to add a forward email address. Enter the email address you want to create in the “forward email address” box, and the email addresses separated by commas in the “to these email addresses” box that you wish for the emails to be forwarded to. Once you have added all of this information then click the “create” button. The Alerts column will let you know when the email forwarding address change has taken effect.

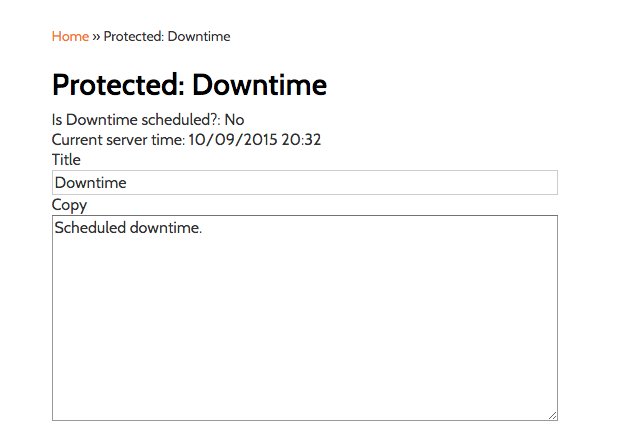


*--Email Address box*

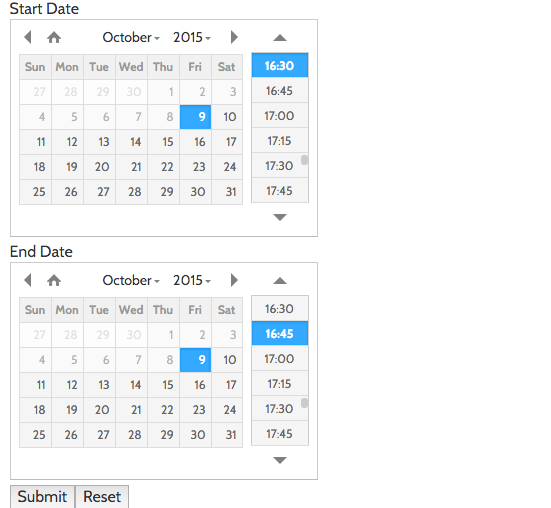
**Downtime Messaging**

To set downtime messaging, navigate to the downtime messaging URL: <http://healthsourceri.wpengine.com/downtime2/>

Set the Title, and copy for the message:



Select the start and end date by double clicking the home icon then setting the time:



After setting all of the settings then press submit.