### School of Medicine Handbook - Migration

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### 1. Accessing the Handbook

To access the Staff Handbook, go to <u>http://medhandbook.st-andrews.ac.uk/</u>. On this page scroll down to the 'Administration block' and click 'log in'. This will take you to the Wordpress login page (shown lower-right). Enter the provided login details.

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	Username Password
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## 2. Dashboard

The Dashboard is used to add and edit posts, upload media, create or maintain users and add extra functionality to the Handbook site.

It's primary function in the migration will be to add the articles from the previous version of the handbook. To navigate in the Dashboard the menu on the left hand side of the screen is used. (This can be collapsed using the option at the bottom to allow for more space in the main screen).

To add a new post in the handbook, click 'Posts', this will take you to a list of all posts added by you so far, then 'Add New'.



Alternatively, you can hover over 'Posts' and choose 'Add New' from the pop-up menu, or click/hover over '+New' at the top of the screen and choose 'Post'







### 4. The Text Editor

Posts are created in the Handbook using the text editor. This will be used whether you are typing a post in full or using it to link to or embed an existing PDF or Word document.

Most of the functionality within the editor will be familiar through use of many Office applications (eg, Bold, Justify, etc) however a few are unique to Wordpress or web-based functionality. Those that will be used are explained below.

- 1. '*Blockquote'* This is used to separate text from the rest of the document, primarily quotes but also can be used for version control identifiers at the bottom of a post. An example of how this appears is shown
- 2. 'Insert/Edit Link' & 'Remove Link' These are used to add or remove hyperlinks on text in a post. This would likely be used when linking to a page on the University website, or to include a link to an email address. As is shown below, there is also the option to easily link to another post within the handbook.
- 3. 'Toolbar toggle' This shows or hides the second row of formatting options
- 4. '*Text Formatting*' This is used to choose a pre-defined style for the text in a post. 'Heading 2' will be used for titles/headings within the post and 'paragraph' for the body text.

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## 5. Posting a PDF

Many documents will be required to be added to the handbook as a PDF file. This may be a form that can be printed and filled in, or a large document that is better suited to existing as a fixed document.

A PDF, once uploaded to the handbook can be presented either as a link (which would then download or open the PDF) or 'inline', displayed within the post where it can be navigated or downloaded as required.

The following demonstrates how to upload a PDF into the handbook then how to display it 'inline' or to link to it directly.



### 5. Posting a PDF

Now the PDF has been uploaded and you have the link copied you can now embed the file or link to it direct.

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How to Add a PDF to the Handbook		
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The document below describes how to embed a document within a post so that it can be viewed 'inline' [pdf height = 800]http://medhandbook.st-andrews.ac.uk/wp-content/uploads/2014/04/001_01_03_01.p	df <b>[/p</b>	df]

Insert some introduction text rather than having the post display only the PDF. It allows you to provide some context to the purpose of the document.

To have the PDF displayed within the post, you will use 'tags'. Immediately in front of and behind the link to the PDF, use [pdf] & [/pdf].

In the example above, it can be seen that a 'modifier' has been added inside the first tag – *height=800*. This is to allow for a longer window in which the pdf will be displayed. This would be an appropriate value to choose for most portrait orientated documents. Examples of various heights are shown on the right hand side.

#### Linking

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To link to the PDF, type the text you wish to have as the link, highlight it and click the *'Insert/edit link'* button.

This will give the box shown to the left. Paste the link to the PDF in the 'URL' box. Give the link a title and click the box to 'Open link in a new window/tab'

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Deputy Head of School	Prof	imon Guild	
Director of Teaching	Prof	Simon Guild	
Director of Research	Prof	Brighen Gillesgie	
Pro Deans Student support	Dr R	th Cruckshank and Dr Mark Ford	
<b>Director of Postgraduate Studies</b>	Dr Pi	ul Reynolds	
School Disability Co-ordinator	Or Jo	Cecil	
Disclosure Registered Persons	Mr C	we Masson and Dr Ruth Cruckshank	
Course director - MSc	Frof	Serry Humphin	
Course director - Milles	Dr R	ichel Davies	
MD2001 / MD2002 Module Controlle	rs Dr Ja	n Aton / Dr Alun Heghes	
MO3001 Module Controller (pint)	Or W	nnie Chalwal	
MD3002 Module Controller	Dr Jo	n Issberner	
MD1002 Dep Module Controller	Dr Ar	ita Laidine	
MD4001 Dep Module Controller	Dr M	dista Antreas	
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## 6. Inserting a Table

Certain posts may have a table of information within them. If choosing to add the post as text as opposed to uploading/linking to a PDF, the table will need to be inside the post. Rather than trying to copy/paste the table it is usually easier creating it from scratch.

The options within the 'Table' menu are explained below.



c. *Split Table Cells* splits previously merged cells

highlighted cells

The functions within the menus for 'Row' and 'Column' above are all self explanatory/ These functions will perform on the row or column of the selected cell which has the cursor in it.

# 7. Inserting an Image

Inserting an image into a post starts similarly to adding a PDF. Firstly the image required needs to be uploaded to the Handbook. From the Add Post screen, click 'Add Media' then "Drag & Drop" the images required or use the browser to select them.

93 Add Media B I →B€ ☱ ☱ 66 — ☱	Insert Media Create Gallery	Insert Media X Upload Files Media Library
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With the image highlighted, there are fields and options on the right-hand side to use. *Title, Caption, Alt Text* and *Description* do not require anything to be added at this stage.

There are three drop-down menus underneath 'Attachment Display Settings' that could be used depending on requirements:

- *'Alignment '- None/Left/Right/Centre -* This determines how the image will be aligned. This will only be noticeable if the image is narrower than the screen width.
- *'Link To' Media File/Attachment Page/Custom URL/None* This is used to specify the behaviour if a user clicks on the image. Media File is the default and is the one that should be used in most cases. This will allow the user to see the image at full size. If Custom URL is chosen, the desired URL can be entered into the box underneath.
- 'Size' Thumbnail/Medium/Large/Full Size Depending on the original size of the image not all these options will be displayed. Unless there is a specific reason to choose otherwise, always select 'Full Size'. This will allow the user the best view possible. The image will be resized to fit within the post if it is too wide.

Finally when all options are chosen, click '*Insert into post*'.

## 8. Replacing Media

Occasionally when a policy is updated, if the handbook is linking or embedding a PDF document stored on Wordpress, this file will have to be updated.

The dashboard allows a function to replace any files. All posts that link to this file will have the link updated automatically.



- 1. In Dashboard, go to '*Media*' then click on '*Library*'
- 2. From here find the document you wish to replace, hover over it and click '*Replace Media*'

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## 8. Replacing Media

- 3. On the Replace Media Upload screen click 'Browse' to find the new, replacement document.
- 4. Find the document on your PC and select it from the file browser window
- 5. The new document name will be show in the screen as highlighted below



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#### 9. Demonstration Post Exercise

UG Teaching Research and PG UG Students Information Technology Infrastructure

#### Demo Post - Gary

🛓 author 🕚 June 10, 2014 🖿 Uncategorized

#### How to add a post

It's important that the correct style of text is chosen for each section within the post. 'Heading 2' is chosen for the titles of each section with a post and 'paragraph' for the body text.

#### Images

When adding images it's important that they remain full size. If they are smaller than a normal browsers width, they can be centered. By default, images link to their full size version, however this can be changed to link to any desired URL. The image below links to the home page of the handbook.

St Andrews University logo

#### PDFs

PDFs can either be embedded or linked to directly. If chosing to link to anything, the browser behavior should be set to 'open in a new window or tab'. The PDF embedded below is also linked underneath.

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Link to	PDF here	ž											

#### **Tables**

A table may be required depending on the data that requires to be entered. A common use of tables is contact information as in the example below

Name	Email address	Telephone number
Linda Kirkcaldy	lk1@st-andrews.ac.uk	1234
Mary Ainsworth	kr16@st-andrews.ac.uk	5678
Sarah Cameron	sac28@st-andrews.ac.uk	5555
Karen Ross	kr16@st-andrews.ac.uk	9999

#### Email Links

In order to have an email address as a live hyperlink, you have to use the add/edit link function and for the URL enter 'mailto:abc@email.com'

Quotes or footers can be done using the 'Blockqupte' function. Useful for version history

gjgb 10/06/14