General Instructions for Baylor Efolio using WordPress

This is a very brief instruction covering the basics necessary to accomplish the tasks of revising the home page with your information and posting required benchmarks for your TED classes. For help, consult the portfolio support site —http://www.baylor.edu/soe/ps.

The new e-portfolio is built with WordPress, a web based blogging platform. This means you can work on your efolio using any computer or device from anywhere with a browser and an Internet connection.

We have worked hard to make it a seamless experience. However, we know that bugs likely exist and that as you use the site you may have valuable suggestions. Please, if you encounter any problems or want to leave any feedback regarding the technology (not content questions—those are for your TED instructors), go to: https://baylor.qualtrics.com/SE/?SID=SV_aWXW0UrkZ5Q5edL

All comments are anonymous unless you leave your email address as a contact. An email will be generated with your comments and sent to the efolio technical staff on submission.

Disclaimer

Please be advised that the template prepopulated on your site was carefully crafted to leverage the strengths of this platform for your efolio. While a number of things have been disabled, there are still ways to change settings that will potentially cause problems. Please do not do so without explicit instructions or help from efolio staff.

Accessing the Efolio site

You can always access efolio evaluations and sites from the callout box on the right-hand side of the portfolio support page: http://www.baylor.edu/soe/ps.

The URL leading to the efolios has not changed: http://portfolio.baylor.edu. Follow the prompts and log in with your normal Baylor user name and password. You can also be connected directly to your site by appending your Baylor user name to the above URL replacing the usual underscore with a dash and then using your normal Baylor credentials to log in. E.g., portfolio.baylor.edu/Bobby-Baylor.
Site Overview

Misc. menu options at the top of every window allow you to navigate and access all the tools for your site and find helpful WordPress information.

Search for words, tags, categories

Static pages

Navigation to posts

Editable body of a page or a post
Dashboard Overview

Hover over your name in the top left menu options on your web page to toggle between your dashboard and your site. The dashboard is your admin area where you find information and manage all aspects of your site. Screen Options allows you to customize this view. Notice the Help button at the top right of the screen. Use it on any WordPress admin page if you want more detail about the content of that page.

The left-hand navigation menu provides links to all of the WordPress administration screens, with submenu items displayed on hover. You can minimize this menu to a narrow icon strip by clicking on the Collapse Menu arrow at the bottom.

As with many applications, there are several ways to accomplish almost anything. What we will demonstrate here is the most direct way we know to accomplish your assigned tasks. If you discover an alternate way you like better, by all means use it.
You have more control over many things in this efolio platform than in the prior HTML template. *While we have done as much as possible to “goof-proof” things, it can happen. It is advisable while in the dashboard to not change anything in the left-hand menu unless specifically directed there to perform a task. Consult with your portfolio support if there are customizations you want to make outside the options covered in this tutorial.*

**Preparation, Media, Pages, and Posts**

The distinction between posts and pages is extremely important.

- A **page** is exactly that, a static web page. Your efolio opens to a static home “About” page. You might also create a static page for something like your teaching philosophy. *During your entire Baylor efolio career, though, it is unlikely you will create many pages.*

- A **post** is where your primary efolio content will be located. It is a blogging environment that grows as you add to it and tracks entries by various means, e.g., date, category(ies), and tag(s). By default, posts are displayed in chronological order from newest to oldest.

- **Media** is non-text content you insert into your pages or posts, i.e., video, audio, photos you want to include. As in other web development, the media is not embedded in the text page, rather a bit of code is generated instructing that the media be displayed at this place. Media is uploaded to a media library and referenced from there on the web display.

To build your efolio, you need to know how to create and edit pages and posts and upload media. The tools you need can be accessed from the left-hand menu in the dashboard. *You can use the pull-down menu accessed from your name at the left in the Toolbar at the top of the web page to toggle between the dashboard and your site. You can also use the “New” menu options to go directly to the task.*

**Preparation**

Before creating or editing your online efolio, having images and other evidence materials ready for upload is important. Since you can only work on your site when connected to the internet, you may want to compose text in a word processor first and then copy/paste into the efolio when connected. This also acts as a backup for your text entries. This is a site viewed over the Internet; so image size is still an important factor, plus directives such as blurring student faces and names are still mandated. Prepare your images beforehand using the Photoshop skills you learned in your instructional tech courses:

- Set the resolution to 72 dpi
- Crop when needed
- Blur student faces and other components as necessary
- Resize the image to a maximum width of 800 pixels
- Optimize the image overall file size for web use
- In general, for best display quality for smallest file size, use JPG for images with fine gradients of color like most photographs and GIF for images with large blocks of color like many logos.

**Backup** of your work is still your responsibility. We have always advised students who use campus computers to have a flash drive dedicated to the efolio and to make sure all documents and images are organized there in case of a catastrophic event. If you use your personal computer, it serves the same archive and organizational purpose as a dedicated flash. Your online presence is backed up regularly, but your keeping track of and maintaining copies of your content is still important. You may even consider doing a periodic export of your site for this purpose.

**Media**

To access your Media Library, start in the dashboard, hover over “Media” in the left-hand navigation menu and select “Library”. You can go ahead and upload here by clicking on “Add New” or upload at
the time you are creating a post or page by clicking on “Add Media” in the page or post editing window.

Here are a few important hints for using the WordPress Media Library:

• There is a list view and a thumbnail view in the Media Library. The list view can be sorted by clicking on the header for each column. Your efolio will grow large over time. Prefixing an image title with the benchmark it is used with will help in organization. E.g., “BM01 -Kids at play”.

• Though there is a very generous 20 MB size limit on media uploads, it is still advisable to optimize your images (good web practice) before uploading. There is a 500 MB limit on your entire site. If you use space for unnecessarily large images, it may cause you headaches later. Plus, you need to reserve space for larger files for video clips.

• Notice the various editing options available when an image is selected: title, caption (will be displayed under the image on the page), alignment on the page, and how large to display the image. Use them to make your pages and posts attractive and easy to navigate.

• Clicking on the image displayed in the page or post opens a browser window with the image at full size. Your instructor will be trained to do this if details of the image are too small to view properly. Make sure the original is decent quality and size and (again) optimized for a file size that does not take too long to open.

• You can create a gallery that consists of more than one image to publish on your page or post. When you click on the “Add Media” button in the page or post editor, the window that pops up has a “Create Gallery” option. You can use it to display multiple images together. Captions added to these will only be visible when the photo is moused over.

• You are still required to obscure student faces and names in all posted images. Do this before uploading the image or video.

Pages
Start by editing the About (home) page in the template

• Prepare (or reuse from your prior efolio) an image representing you as the teaching professional you are. Use this image on your About page.

• Starting in the dashboard, hover over “Pages” in the left-hand navigation menu and select “All Pages”. From the list, click on “About”—your home page. This opens what should be a relatively familiar editing window. Mouse over the different tools if you need to understand their function.

• Click on the image to select it and use the tools revealed at the top of the image to remove it. Click on the “Add Media” button and select the “Upload Files” tab (if you have not already uploaded your teacher photo.) You can either drag the photo into this window or use the “Select Files” button to navigate to the image. The uploaded file will open in the Media Library. Notice the various editing options available when an image is selected for insertion: title, caption (will be displayed under the image on the page), alignment on the page, and how large to display the image. Click on the “Insert into Page” button at the bottom right of the window and selected files will be added to your page. You can always click on the image again in the editing environment and select the pencil to open editing options for the image.

• Fill in the rest of the required first page information (graduation date and major) directly in the text editor and format it so it looks good to you.

• Add a pithy quotation about education.

• When you have changed and formatted the page the way you want, be sure and click on the blue “Update” button to save your changes.
• Go to your name at the top left of the Toolbar and choose “Visit Site”. That will take you back to the web page interface where you can check on your changes.

You can use the same basic process when you add a new page, perhaps a more lengthy philosophy of education, though there is an extra step necessary for it to display in the Menu options.

• After the page is created, go to the Menu options (either from the list under your name on the site page or under Appearance on the dashboard.
• Make sure Main Menu is displayed in the pull down menu by “Select a menu to edit:”. If not, choose it and click on “Select”.
• Place a checkmark in the box to the left of the page you added and click the button “Add to Menu”.
• Locate the page and drag it to the location in the menu you want it to be displayed.
• Click on the “Save Menu” button. The page should now be displayed in the menu options on the site pages.

Remember, your primary efolio entries for the benchmarks will be posts, not static web pages. You will create very few, if any, static web pages as you build your efolio.

Posts
Important information regarding posts:

• For every unique benchmark entry you will create a post. There are no more single pages for all narratives for each of eighteen benchmarks with links to evidence pages you created.
• Every post will contain your narrative and evidence for that particular benchmark entry. Every new entry for a particular benchmark is a new post.
• It is imperative when you create a post that you assign it the category of the benchmark you are presenting. This is how your instructor will locate and isolate particular posts. Please refrain from adding any new categories.
• Tags are added as a further way to selectively view posts. At a minimum tag each post with your program level (Novice, Teaching Associate, or Intern) and the last name of the instructor who will evaluate this post. You can add any other tags you think will be useful, just be sure a comma separates them.

Workflow will look like:
1. For each narrative for a benchmark, create a new post and add a title (or open a draft created previously).
2. In “Categories” in the right-hand menu, click in the box beside the benchmark this post represents—one benchmark per post.
3. In “Tags” in the right-hand menu, type in your program level when you created this post (Novice, Teaching Associate, or Intern) and the last name(s) of the instructor(s) who will evaluate this post plus any other tags you feel will be useful.
4. Compose (or paste) the benchmark narrative in the editing window.
5. Add the evidence after the narrative by uploading media, linking to outside web pages, etc.
6. Click on the “Publish” button to send a new post to your site or click on the “Save Draft” button to save it to work on later. If you are editing an already published post, be sure and click on “Update” when done.

If your TED instructor requires you to recreate prior efolio work:
• Create a new post and use your flash drive with your efolio content to copy/paste and add media.
• When you create the new post, click on **Edit** by “Publish Immediately” and set the date to the last revision of your prior work.
• If you lost your archive of your prior efolio work in the old system, bring a flash drive to the Media Center and show the staff your Baylor ID. They will load a copy of your efolio to the drive.

A few final important hints:
• You must click on “Continue Reading” for a post to see the entire entry
• As the admin for the page, you can return to the editing window directly from a post by clicking on “Edit”. Be sure and click on “Update” after you make any changes.
• It’s always advisable to make sure your new posts show up when “All Benchmarks” is selected on the site page. Double check that the proper benchmark is displayed above the title and the correct tags are displayed under the title.
• If you don’t find your most recent post, check to make sure a benchmark category was selected. If not, it automatically publishes as “Uncategorized”, which needs to be deselected in the editing page and the proper category selected.
• **Add photos to your gallery at a larger, readable size**, but insert them to your page at a smaller size. Your instructor can then click on the smaller image on the post to open the larger if a closer look is warranted. WordPress helps maintain optimal speed of the site by creating a version for display at a more optimized file size according to the size setting you choose in the image editing window.

**Important regarding the Comments feature**
One of the strong aspects of the WordPress model is the ability to leave multiple comments for each post. Comments require your approval before they are displayed. At this time approved posts are public and can be read by anyone with access to your site. **Unless instructed to do so, please do not approve!** There may be a way to leverage comments in the near future, but for now it is best to not make them public.

**Two final tasks**

1. **Change the tag line** on the site to reflect your current program level—Novice, Teaching Associate, or Intern.
   a. When looking at your site (not the dashboard), hover over your name and select “Customize”.
   b. Expand “Site Title & Tagline” and enter a different title for your efolio if desired. Please keep your name in it to help keep your instructors oriented to your work.
   c. Enter your current program level as a tagine.
   d. Click on “Save & Publish” to make the changes.
2. **Load an avatar** (a photo of yourself)
   a. Go to the Dashboard and make sure “My Account” is showing in the screen options.
   b. Click on the default avatar to open a window for replacing it with yours
   c. Follow the prompts to update with your photo