
Maintaining Your Website: a WordPress Primer

Congratulations on your new website!

We hope you're as excited as we are about the ability to make updates to your website. This tutorial contains the basic information you'll need to do just that. Should you find anything is missing or unclear, please contact Tzaddi at tag@thrivewire.ca. Your feedback helps us to support you and improve this tutorial for future versions.

Accessing WordPress

There is no software to install for using WordPress. You simply use any web browser (Internet Explorer, Firefox, etc.) to log in at: <http://yoursiteaddress.com/wp/wp-admin/>

- Upon log-in you'll see the WordPress Dashboard, which has:
- the **main navigation on the left-hand side**. You can expand any of the categories by clicking on them.
- **Right Now**: a summary of the content on your site. These are also links to some of the most common tasks.
- A **notice of broken links** in the site, if any
- Links to **Recent Drafts**, if any

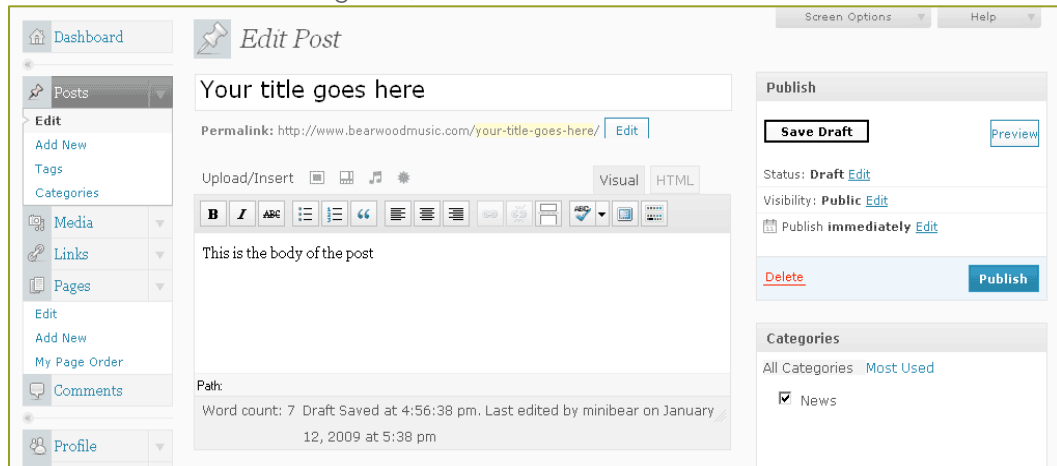
The Content

Content Structure

- There are two kinds of content: **posts** and **pages**.
- Posts tend to be used for blog posts, news, etc., and are **usually displayed by category and date order**.
- Posts are assigned to one or more categories.
- **Pages** tend to be more **timeless**, e.g. "About Us" pages

Creating a new Post - The Basics

1. Under Posts in the main navigation, click the **Add New** link. You'll see a screen like this:



2. **Enter a Title** and below that, the Post content.
3. Remember to click on the **category** which applies to this content (though it will be assigned to the default category automatically if you forget). If multiple categories are assigned, the post will show up in each of them.
4. Now you can either **Save the content as a draft**, or **Publish** it to the site immediately. You could also publish at a future time by using the Edit link which is next to "Publish immediately" (just above the Publish button).

For more advanced info such as creating links or uploading images, read on.

Creating a Page

Creating and editing pages is pretty much the same as for posts. The main differences are:

- You'll use the **Pages section of the main navigation** to add a new page
- Pages are **not assigned to categories**.
- Pages **may have a Parent page**, allowing them to be grouped into sections. E.g. An *About Us* page might have children pages for *Directors* and *Location*.

Editing previously published content

There are several ways to get to the content editing screen.

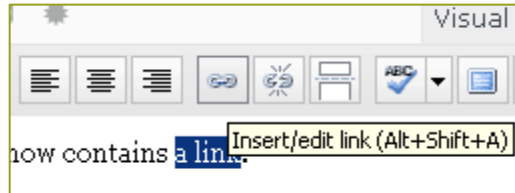
1. While you're logged in, view your website and find the page or post that you want to edit. If it's a page you can edit, you should see an **Edit link below the content** (it only shows if you're logged in).
2. OR from within the WordPress Admin, and use the **Edit links within the main navigation's Posts or Pages areas**. Then find the item you're looking for, and click on its title.
3. OR from the Dashboard's Right Now area, click on the links to # of pages / # of posts.

Advanced Editing Tasks

Creating Links

To create links in your content, simply:

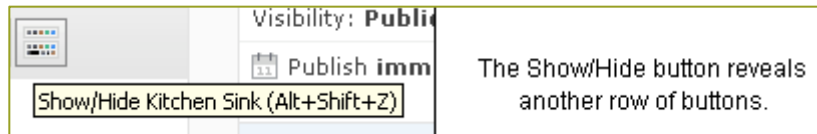
- **Select the text** that you want to hyperlink.
- **Click on the link icon** which looks like a chain:



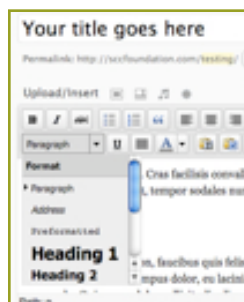
- You'll see a little pop-up. **Enter the URL** (the location of the page you're linking to starting with http)
- You'll typically leave **Target** as-is (Same Window). Should you want to open a link in a new window you can set that here.
- **Enter a link Title**; something brief to describe where the link goes to. Titles make links more user-friendly. They are used by screen readers for the blind as well as to display the tool tip when your mouse hovers over a link (as in the example above, the little yellow area that says "Insert/edit...")
- The Class option can be ignored.

Subheadings

To create subheadings within a post, click the right-most icon to Show/Hide Advanced Toolbar.

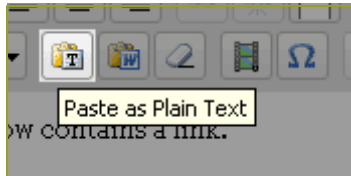


- **Click the style drop-down menu** and select **Heading 2**. (WordPress will assign Heading 1 to the overall post title, so you want to use the next level down. This helps to keep styling consistent, and to make the content structure clear to search engines and screen readers.)



Editing modes & pasting content from Microsoft Word

- The content editing area has **two views: Visual and HTML**. You'll probably use visual most or all of the time.
- ****Please** don't paste copy from Microsoft Word straight into the visual editor, or strange formatting may result.** This may also happen when copying from other programs which use HTML formatting.
- To avoid the strange formatting:
 - **Use the Paste as Plain Text button:**



OR

- switch to HTML view
- paste your content
- switch back to visual view

How do you know if you're pasting in HTML formatting from other systems?

There shouldn't be a lot of difference between what you see in Visual and HTML views. The strange formatting will look something like this in HTML view, having font-sizes and font-families, etc. If it has any style or font code, it's probably going to degrade the consistency of the site's overall look & feel because it will over-ride the styles set out for the site.

Watch out for this kind of junk code in HTML view:

```
<span style="font-size: 10pt; font-family: Verdana; mso-fareast-font-family: 'Times New Roman'; mso-bidi-font-family: 'Times New Roman'; mso-ansi-language: EN-US; mso-fareast-language: EN-US; mso-bidi-language: AR-SA;">create subheadings within a post, click the right-most icon to <strong style="mso-bidi-font-weight: normal;">Show/Hide Advanced Toolbar.</strong>Click the dropdown menu and select <strong style="mso-bidi-font-weight: normal;">Heading 3</strong>. See screenshot below. (WordPress will
```

Displaying Full posts vs. Excerpts

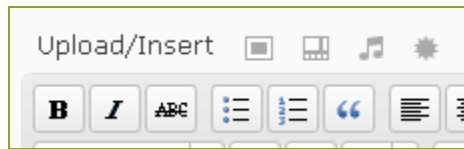
IF your site is designed to display the full post on some pages, and the post you're writing is long, you can manually set it to show as an excerpt followed by a "Read more..." link. To do this:

- **Place the cursor** where you'd like that link to show
- Click on the **button to split the post with a more tag**. It looks like a page that's cut with a dashed line:



Images & Uploading

When writing or managing content, you can upload images. Note the Upload/Insert area above the writing box:



Adding an IMAGE to your post or page

- Click the **picture frame icon** (the first in the row).
- In the next screen you can **upload a picture** from your computer, OR **enter the URL/location** of an image from the web, OR **grab a previously uploaded image** from the media library.
- You may choose to **align the image**. Aligning right usually works best with how text lays out on a web page. Left or center may be good for larger images.
- You may **enter a Title** and optionally a Description. They can be the same. These are used by search engines as well as screen readers for the blind so it's a good habit to enter at least a title.
- You may also link an image during this process, or afterwards (so the image is clickable).

Adding GALLERY to your post or page

- You'll first have to **upload each image** following the upload procedure above. You don't need to insert, but just upload.
- Once all pictures have been uploaded, click **the picture frame icon again**.
- Click the **Gallery tab** in the pop up. It should show a list of all images you've uploaded for this post/page.
- Click the **Insert Gallery** button.

Uploading other documents, e.g. PDF

This is a similar process as uploading an image. You can use either the add image or add media icons for this. Note, however, that it doesn't insert a picture of the PDF.

1. **Upload the file**
2. **Change the title** to be the text that you want to be clickable e.g. "Annual Report (PDF)"
3. Click the **File URL** button to automatically fill out the Link URL box
4. Click **Insert into post**

You should now have a link with your title text which, when clicked, opens the PDF. If you instead wanted to have a picture, e.g., a graphic representing your report, you would first upload the image separately and then link it to the PDF's File URL.

Adding Video from YouTube etc.

1. Click the **Add Video** icon.
2. **Enter the location of the video**; the address of the page where the video can be found. It must begin with http.

OR

1. **Copy the embed code** from YouTube, and **paste it while in HTML view**.

Other Post/Page Options

Permalink

Above the writing area on a post or page you'll see a "permalink" which is created automatically for you. These are also known as a page address or URL.

URLs are an important part of search engine ranking, so ideally they should contain words which are descriptive of the content and also contain keywords users are likely to search for.

Most often you'll just ignore the permalink field, because WordPress creates them based on the title you've entered. (And hopefully, your title is already well-constructed for both users & search engines!)

However, you might want to edit the permalink if you need it to be different from the title e.g., if you change the title part-way through composition, or your title is quite long and you want a shorter, more keyword-rich permalink.

To edit the permalink:

1. click in **the permalink field**
2. **edit** the permalink
3. click the **save button** next to the permalink field
4. save or publish the page/post to ensure the changes have been applied

if you have any created links **to** the post you're editing, you may break those links. That's OK – you can change those too afterwards.

Time-stamp

If you'd like to post old content from another source, or change the order posts appear in, **you can adjust the time-stamp** using the Edit link next to **Publish Immediately** in the right column, above the publish button.

Comments

Your site may or may not be set up to allow comments on your content. If it is, you can control this on a post-by-post basis. See the **Discussion area** below the post editing area.

Password Protection and Privacy

You could also choose to enable password protection on a piece of content, or to keep it in a Private status until you're ready for others to view it. You'll do this using the **Visibility options** just above the publish button.

Including Unusual content in a post or page, e.g. PayPal Buttons and Opt-in Forms

To paste in HTML for this type of content, simply switch from Visual to HTML view before you paste.

Publish Status

If you publish something by accident, you can hide it by changing the Publish Status back to Draft.