

WordPress

WordPress

1. Open Source content management system used to create websites and blogs.

Login

1. URL - <http://your-wordpresssite.com/wp-admin>. Replace your-wordpress-site.com with your actual domain name.
2. One at the Dashboard login using either your Username or your email address.

Dashboard

1. Main administration homepage.
 - a. Top of your Dashboard (and across every page) you will see: name of your site and name of person currently logged in).
 - b. Move your cursor over your name to reveal the Log Out link as well as a link to edit your profile.

Posts

1. Create a new Blog Post or update your Categories and Post Tags.

Media

1. Location of uploaded images and documents.
 - a. Browse through the Media library, as well as edit and update the files.

Pages

1. Create and maintain all your Pages.

Comments

1. Manage all your Comments within this section, including replying to comments or marking them as spam.

Appearance

1. Control how your site looks.
 - a. Choose Theme, manage Widgets or Menus and edit your site theme files.

Plugins

1. Plugins extend and expand the functionality of WordPress.
 - a. Add, delete, activate or deactivate.

Users

2. Lists all the existing users.
 - a. Depending on your Role, you can also add new users as well as manage their Roles.

Tools

1. Access to various convenient tools.

Settings

1. Configure your site name and URL , where your Posts appear, whether people can leave Post Comments or not and numerous other settings.
 - a. Default settings are typically fine. Toolbar

Toolbar

1. Easy way to access WordPress features.
 - a. Visible when logged into WP.

Customizer

1. Allows you to update various site settings.

Posts versus Pages

1. Posts are a series of articles, listed (usually) reverse-chronologically.
2. Pages are used for more static content (i.e. content that doesn't change or changes infrequently).

Post

1. Edit -edit your Post.
2. Quick Edit – Allows you to edit basic Post information such as Title, Slug and Date.
3. Trash – Will send the Post to the Trash. Once the Trash is emptied, the page is deleted
4. View – Displays the Post. If the Post hasn't been published yet, this will say Preview
5. Next to each Post title is a checkbox. This allows you to perform an action on multiple items at once. will move the selected items to the Trash.

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Pages

1. Edit – Allows you to edit page
2. Quick Edit – Allows you to edit basic Page information such as Title, Slug, and Date.
3. Trash – Send the Page to the Trash. Once the Trash is emptied, the page is deleted
4. View – Displays the Page. If the Page hasn't been published yet, this will say Preview.
5. Next to each Page title is a checkbox. This allows you to perform an action on

Adding your Site Content

1. Posts allow you to associate Categories and Tags whereas Pages don't.

Categories and Tags?

1. Tags are ad-hoc keywords that identify important information in your Post (names, subjects, etc) that may or may not recur in other Posts.
2. Categories are pre-determined sections

Block Editor

1. Default editor when creating a new Page or Post.
2. Treats all your content as individual blocks.
3. Provides individual blocks for all your common content.

Adding a New Page

1. Hover your cursor over the Pages menu option in the left-hand navigation and click the Add New link.

Adding a New Post

1. Hover over the Posts menu option in the left-hand navigation and click the Add New link.

Block Editor Tools

1. Block Inserter icon is used to insert new blocks into your content.
2. Click to pop open a small panel that gives you access to all the different types of blocks.
3. The Undo icon allows you to Undo your most recent change(s).
4. The Redo button allows you to Redo your most recent change(s).
5. The Content Structure button provides information about your page content.
6. The Block Navigation button shows a list of all the blocks
7. The Switch to Draft button only appears after your Page/Post is published.
8. The Save Draft button allows you to save your Page.

9. The Preview button will allow you to preview your page.
10. The Publish button allows you to publish your Page/Post.
11. Update button saves your changes after Published.
12. The Settings Sidebar shows all the settings for your Page/ Post.
13. Show more tools & options icon provides access to a number of adhoc settings.

Content area.

1. Add all your content, comprised of various types of blocks.
2. Each block that you add into your content area, will have its own unique toolbar, and will either display just above the block (by default).
3. The Settings Sidebar contains settings for the whole Page/Post that you're currently editing, as well as settings for the currently selected block.
4. Document tab shows the settings for the individual Page/Post.
5. The Block tab shows the settings for the currently selected block.

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Adding Content with Blocks

1. Each individual bit of content in your page will be a different block.
2. Click Add block icon ("+ ") in the Block Toolbar at the top of screen.
3. Clicking this icon will show the Block Inserter popup, which is a small panel that gives you access to all the different types of blocks that you can insert.
4. Scroll through the list and click on the type of block that you'd like to insert, or if you know the name of the block, you can start typing its name in the search field to filter the list of blocks shown.
5. Once you click on a block to insert it, the new block will be inserted above the currently selected block.

Inserting Using the 'slash command'.

1. When your cursor is sitting in an empty Paragraph Block, you can convert that block to another type of block by typing a forward slash (/) and then the name of the block.
2. As you type more characters, the list of blocks being

displayed will filter down based on what you've typed.

3. Typing '/im' will show you a list of blocks that either start with, or are related to images

Change Block Type Icon

1. Different for every type of block.
2. Hover your cursor over the Change block type to select a new block type

Block Types

1. Common Blocks -content type such as the Paragraph, Heading, Gallery, Image, list.
2. Formatting - specialized content blocks such as the Code, Classic, Custom HTML, Table
3. Layout Elements - help stylize your content such as the Button, Columns, More, Page Break.
4. Widgets - special widgets such as the Shortcode, Archives, Categories, Latest Comments and the Latest Posts.
5. Embeds - contains the Instagram, Twitter, Facebook, YouTube, Spotify.
6. Reusable – blocks that you've styled a certain way that can be reused on other pages in your site. If you update a Reusable Block, those changes are

applied everywhere that Block has been used.

Common Blocks

1. Audio Block- allows you to embed a simple audio player into your content.
2. Cover Block-allows you to add an image or video into your content with an optional colored overlay and text.
3. File Block-allows you to create a text link, with an optional button, to one of your uploaded media files such as a PDF or Word Doc.
4. Gallery Block- allows you to add an image gallery.
5. Heading Block-allows you to insert an HTML Heading into your page. Image Block
6. Image Block allows you to add an image to your content. button to enter the URL of the image you would like to display. in the Settings Sidebar.
7. List Block- allows you to add ordered and unordered lists (i.e. bullet points) to your content.
8. Paragraph Block-allows you to enter a paragraph of text.
9. Quote Block-allows you to add a quote along with a citation.

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10. Video Block-allows you to add a video to your content.
11. Code Block-allows you to add example code to your content.
12. Classic Block- allows you to add text content to your site using the traditional TinyMCE interface. The benefit of using the Classic Block instead of the Paragraph Block is that you can enter multiple paragraphs of text into the same block.
13. Custom HTML Block- allows you to add custom HTML tags into your content. This block will also accept JavaScript code as well, but won't accept server-side languages such as PHP code.
14. Preformatted Block-allows you to add text that respects your spacing and tabs and is usually displayed in a monospace font.
15. Pullquote Block-allows you to highlight certain text. Pull quotes are short excerpts from your content. They're used to pull a text passage out of the content so as to highlight and provide a visual aid to your readers.
16. Table Block-allows you to add an HTML table to your content.

17. Verse Block-allows you to add poetry to your content.

Layout Elements

1. Button Block-allows you to easily add buttons with HTML links into your content.
2. Columns Block-allows you to insert a row with multiple columns.
3. Media & Text Block-provides an easy way to add a two-column layout consisting of text content and a media file, such as an image or video.
4. More Block-allows you to add a More Tag to your content. Most archive pages (e.g your blog page) only display a small excerpt of a Post and then provide you with a "Read more..." link to continue reading the rest of the article. the text in your "Read more..." link, simply click the text within the block and
5. Page Break Block-allows you to break your content up into multiple pages. This is ideal if your page has a large amount of content. After adding a Page Break Block, your published content will show navigation links for each of the pages.

6. Separator Block-allows you to add a horizontal separator into your content.
7. Spacer Block- allows you to add white space between blocks.
8. Widgets Archives Block-allows you to display a monthly archive of your posts.
9. Calendar Block- allows you to display a monthly calendar view of your Posts. There are no settings for this block. Once you insert the block into your content, it will provide a link on any day in the current month, that has a published Post, along with a link to the previous month that has Posts.
10. Categories Block- allows you to display a list of all your Post Categories.
11. Latest Comments Block-allows you to display a list of your most recent comments.
12. Latest Posts Block-allows you to display a list of your most recent Posts.
13. RSS Block-allows you to display an RSS feed in your content.

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14. Search Block- allows you to display a search field and button in your content.

Shortcode Block-allows you to insert a Shortcode into your content.

Tag Cloud Block-allows you to insert a Tag or Category Cloud into your content.

15. Embed Blocks- Way to add video or other content into your pages. A popular example of this is embedding a YouTube video into your page.

- a. To embed something into your Post or Page, simply select the appropriate Embed Block, paste the URL into the field and click the Embed button.
- b. WordPress embed blocks include: Amazon Kindle, Facebook, Flickr, Hulu, Instagram, SlideShare, SoundCloud, Spotify, TED, Twitter, YouTube
As the name suggests,

16. Reusable Blocks- can re-use anywhere on your site. A Reusable block can be added to any Page or Post, and as many

times as you want. If you update or change the style of your Reusable block, the changes are automatically applied to that block, right across your whole site.

- a. Once you've got the block looking how you want it, click the Add to Reusable Blocks option under the More options icon on the Block Toolbar. You're then prompted to enter a name for your Reusable Block.
- b. After doing so, click the Save button to save it. Your new Reusable Block will appear under the Reusable section within the Block Inserter.

Rearranging Blocks

1. On the left of each block (or just above the block, if the block is set to display full width), are two block mover arrows. Between these arrow icons is a block mover drag handle. These block mover arrows and drag handle will only appear when your cursor is hovering over the block.
2. Click on either of the block mover arrows will move that particular block, further up or down within your page.

3. You can also click and drag on the block mover drag handle, and drag the block up or down the page.

Editing Existing Content

1. Click on the relevant Page/Post title, when viewing your list of Pages or Posts. Alternatively, click on the Edit link that appears beneath the title when hovering your cursor over each row.

Deleting Content

1. Click on the Trash link that appears beneath the title when hovering your cursor over each row.
2. To delete the Page/Post permanently or to restore the Page/Post, click the Trash link at the top of the screen. When the cursor is hovering over each item in the Trash, the Restore and Delete Permanently links appear. Click Delete Permanently or Restore to bring a page back.

Saving and Publishing content

Once you've added all your content to your Page or Post you have the option of

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Saving the Page as a Draft or Publishing the page.

1. Clicking the Save Draft link will simply save your Page/Post.
2. Click the Preview button to see what page will look like before being published.
3. Change the visibility of the Page by clicking the link just to the right of Visibility within the Status & Visibility panel.
 - a. Public is default and means the page is viewable to all.
 - b. Private hides the content from the public completely.
 - c. Password Protected allows you to assign a password to your page.
4. Within the Permalink panel in the Settings Sidebar is the full URL for your Page or Post. You'll see this URL after saving your content for the first time, along with the Page/Post Slug that was generated for the page.
 - a. You can edit this page slug by editing the URL field just above the URL link.

5. Schedule your Page/Post to be published. After setting a date & time to publish, you must still click the Publish button to publish at the desired date and time.
6. Publishing your content is two-step process.
 - a. Click the Publish button, you're shown a new publish panel, confirming your selection, along with giving you another chance to update your contents visibility & publish date.
 - b. Clicking the Publish button here will publish your Page/Post and make it live on your website.

Revisions

1. When you're editing your Post or Page, the number of revisions for that particular Post or Page is shown in the Publish Panel, if you have any.
2. Click the Browse link next to Revisions: in the Publish panel to browse through the various revisions for the current Post or Page.

3. Use the slider at the top of the page or click the Previous and Next buttons to navigate through your various Post or Page revisions.
4. Content that has been deleted will be shaded red and content that has been added will be shaded green. If there is content that is shaded dark red and/or dark green, it's highlighting specific content that was removed or added.
5. Click the Restore This Revision button to restore page/post.

Adding Images and Other Media

1. All your images and files are stored in the Media Library.
2. To insert an image into your Page/Post, click the Add Media button and then drag your image(s) from wherever they are on your computer, into the browser window. Your file(s) will be automatically uploaded.
3. Alternatively, click the Select Files button and then select the file(s) that you'd like to upload, using the dialog window that is displayed.
4. After uploading your image(s), you can then select other previously uploaded images by

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holding down the Ctrl key (Cmd key on Macs) and simply clicking on them.

5. To deselect an image, click the 'tick' in the top right corner of the image.
6. Once you've selected all your images, click the Insert into post button to insert the selected image(s) into your Page/Post at the current cursor position.
7. Click the Add Media button to add previous uploaded images.

Edit or Delete an Image

1. Click the Edit button edit the image properties.
2. Click the Remove button to remove the image from your content. It will only remove the image from your Page or Post, it will not delete the image from your Media Library.

Insert an Image Gallery

1. WordPress has its own simple built-in Image Gallery that allows you to add multiple images to a page in one easy step.
2. To insert an image gallery into your Page/Post, click the Add Media button. A pop-up window will display that looks the same as the one that

displays when you add an image to your Page/Post. You can upload new images to use in your gallery or you can simply choose from your previously uploaded images.

3. By default, you'll be shown a list of your previously uploaded images. If you'd like to upload a new image, click on the Upload Files link at the top of the pop-up window.
4. Click the Create Gallery link in the left-hand navigation then select the images that you'd like to insert into your gallery.
5. After selecting your images, click the Create a new gallery button at the bottom of the pop-up window. The window will change so that only the selected images are shown.
6. All the images that appear will be used within your Image Gallery. To reorder the images simply click on an image and drag it to its new position. If you'd like to add captions to your images, click the 'Caption this image..' text below each image and then type in your caption.

- a. Link to – This sets what happens when the thumbnail image is clicked.
- b. Selecting Media File will open the full size image directly in your browser window. Selecting Attachment Page will open the image within one of your WordPress formatted pages
- c. Columns – Specifies the number of columns to use when displaying your thumbnail images.
- d. Random Order – Click this checkbox to display your images in a random order.
- e. Size – Selects the size of the image to use in your gallery

Edit or Delete an Image Gallery

1. After clicking on an Image Gallery that has been inserted into your Page or Post, two icons will appear on top of the gallery.
2. Clicking the Edit button allows you to edit the image gallery properties.

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3. Clicking the Remove button will delete the image gallery from your content. It will only remove the image gallery from your Page or Post, it will not delete any images from your Media Library.
4. After clicking the Edit icon you will be shown the same pop-up window and options as when your image gallery was inserted into your Page/Post.

Insert an Audio or Video Playlist

1. Click the Add Media. A pop-up window will display that looks the same as the one that displays when you add an image to your Page/Post.
2. You can upload new media files to use in your playlist or you can simply choose from your previously uploaded files.
3. If you'd like to upload a new media file, click on the Upload Files link at the top of the pop-up window.

Create an Audio Playlist

1. Click the Create Audio Playlist link in the left-hand navigation. The pop-up window will display a list of your audio files.
2. After selecting your media files, click the Create a new playlist

button at the bottom of the pop-up window. The window will change so that only the selected media files are shown.

3. All the media files that appear will be used within your playlist. To reorder the files simply click on a file and drag it to its new position. You can change the title for each file by clicking the text below each file and then typing in your new title.
4. If you decide you no longer want a certain media file to appear in your playlist, click the small icon that appears in the top right corner of the file when you hover your cursor over the 'x'.
5. You can change how your playlist appears in your page by selecting which items you'd like to appear.
6. When inserting an audio playlist you have the following display settings.
 - a. Show Tracklist – Ticking this checkbox will show a list of all the audio files within your playlist

- b. Show Artist Name in Tracklist – Ticking this checkbox will show the artists name next to each track name
- c. Show Images – Ticking this checkbox will show any associated audio file images

7. When inserting a Video Playlist you have the following display settings.
 - a. Show Video List – Ticking this checkbox will show a list of all the video files within your playlist
 - b. Show Images – Ticking this checkbox will show any associated video file images Inserting Video, Audio or Other File Type
8. When inserting video or audio files, you can select Embed Media Player from the Embed or Link dropdown list in the Insert Media pop-up window to use the audio and video players that are now built into WordPress. Supported audio/video

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formats include M4a, MP4, OGG, WebM, FLV, MP3, and WAV files.

Adding HTML Links

1. HTML links allow your site visitors to easily navigate around your site. They're also used when you want to allow people to download files from your site, such as PDFs or other documents, for viewing images or even just linking to other websites.
2. HTML links will frequently be shown with an underline to differentiate it from other text, but this may vary depending on the theme you're currently using.

Inserting an HTML Link

1. Click and drag the cursor and highlight the text that you want turned into a link and then click the Insert/edit link button.
2. A small inline link toolbar will display where you can enter your link URL.
3. If you enter a URL without including 'http:/' in front of it, WordPress will automatically correct it for you.
4. Click the Apply button to save your changes.

5. If you don't select any text prior to clicking the Insert/edit link button, it will use the URL that you enter as the link text.
6. You can also insert a link to one of your existing Posts or Pages by simply typing the Post or Page name and then selecting it from the list that displays. As you type the Post/Page name the list will re-populate based on matching results.

Inserting Links to Media Files

1. Click the Add Media button and then simply drag your file from wherever it is on your computer, into the browser window. Your file will be automatically uploaded.
2. Once your file is uploaded, your Media Library, which contains all your previously uploaded files, is displayed. The file that you've just uploaded will be automatically 'selected' for easy insertion into your Page or Post.

Editing an HTML Link

1. Click the link within your Page/Post that you'd like to edit to display the inline link toolbar.

2. Once the toolbar appears, click the Edit button to display the edit field. Alternatively, click the link within your Page/Post and then click the Insert/edit link button on the main Visual Editor toolbar.
3. After you've updated the link url, hit your Enter key or click the Apply button to save your changes.

Removing an HTML Link

1. Click the link within your Page/Post that you'd like to remove to display the inline link toolbar.
2. Once the toolbar appears, click the Remove button to remove the link.

Appearance

1. The various Appearance menus allow you to change how your site looks and behaves.
2. Depending on the theme that your site is running, you may find that you don't have all the menu options listed here, or you may have a couple of different ones. The reason for this is that a couple of the options under the Appearance section are theme based.

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Selecting your Theme

1. The overall appearance of a WordPress site is controlled by the Theme. Although there is a default theme that comes installed with WordPress, most people will either download a new theme, purchase one, or have one custom designed and built.
2. There are hundreds of places where themes can be downloaded for free and/or for a small fee.
3. One of the best places to start looking for themes is in the official WordPress Themes Directory.
4. Clicking on the Appearance menu option will default you at the Themes screen.
5. The theme that is currently active is shown at the top left of the screen.
6. The other themes shown are ones that are installed, but not currently in use.
7. To see a preview of your site in another theme (that isn't currently active), you can click the Live Preview button associated with each theme.
8. While the preview screen is

displayed, you're able to click your site links to view your various pages in the new theme layout as well as make various theme changes.

Change your Site

9. Hover your cursor over the theme you'd like to activate and click the Activate button that appears underneath the Theme.
10. Alternatively, if the preview window is displaying, you can click the Save & Activate button in the top left corner of the window to activate the theme.
11. To view more details about a particular theme, hover your cursor over a theme thumbnail image and click on Theme Details.
 - a. A pop-up window will appear that displays a larger image along with the theme description and other details.
12. Clicking on the Add New button at the top of the page allows you to upload a new theme to your site as well as search the WordPress Themes Directory for new themes and install them directly from within your Dashboard.

Previewing and Customizing your Theme

1. As well as the ability to preview a theme, you can also update various theme settings all while previewing the changes live.
2. The options that you can change will be dependent on the individual theme.
3. For the currently active theme, clicking the Customize button allows you to update various settings whilst also previewing those changes.
4. Until you click the Publish button, only the theme preview window is updated, not the theme on your live site.
5. For all other installed themes that are not currently active, click the Live Preview button to preview the theme, update its settings and activate the theme.
6. Until you click the Activate & Publish button, only the theme preview window is updated, not the theme on your live site.

Adding a new Theme

1. You're able to add new themes to your site right within the WordPress Dashboard.
2. At the top of the Themes screen there is an Add New button.

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3. Click this button to search and add new themes into your site.
4. After clicking the Add New button, you'll be shown the Add Themes screen.
5. The Add Themes screen allows you to search and install themes directly from the official WordPress Themes Directory.
6. By default, the screen will show a list of Featured themes.
7. You can use the links at the top of the page to filter the results to see Featured themes, Popular themes or the Latest themes.
8. Click the Feature Filter link to filter the results based on the Tags you specify. There are Tags for Layout, Features and Subject.
9. Hovering your cursor over each theme thumbnail will display extra buttons.
10. To view the details of a theme along with a preview, click the large Details & Preview button or the smaller Preview button.
11. Clicking the Install button will download and install the theme on your site.
12. After the theme is installed, you will be given the choice to view a Live Preview, immediately

Activate the theme or return to the Theme Installer.

13. On the Add Themes page, you also have the option to manually upload a theme to your site.

Upload a Theme

1. Click the Upload Theme button at the top of the page.
2. Select your theme file from your computer by clicking the Browse... button. Your theme file must be uploaded in .zip format.
3. After clicking the Install Now button, your theme will be automatically uploaded to your site and installed. You are then given the option to preview the theme, activate the theme or return to the Themes page.

Customizing your Site

1. Using the Customizer, you can modify certain parts of your website.
2. When you click on the Customize menu option you'll be shown the various theme options that you can change.
3. Depending on the theme that is currently in use, you may see more or less options.

4. Clicking the small arrows will open and close each of the panels, giving you access to each of the various options.
5. You'll find that some of the options in the Customize screen are also available via other menu options.
6. As you make your changes on the left-hand side of the
7. Customize screen, the live preview on the right-hand side is automatically updated.
8. You can also use the live preview window on the right-hand side of the page to navigate around your site.
9. By default, the Customizer will show your homepage in the preview window.
10. Not all Customizer options affect the homepage though.
11. You'll find that some options in the Customizer may also affect other parts of your site such as your blog, or static Pages.
12. You can browse around your site in the live preview window to view these other pages, just like you would when viewing your site in a separate browser window.

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13. To help with testing your site across various devices, the Customizer also allows you to preview your site in mobile, tablet and desktop views.
14. At the bottom of the Customizer panel, click one of the view icons to change your site preview so that you can get an idea of how it will display on a regular desktop, a tablet or smartphone device.

Widgets

1. Widgets are independent sections of content that can be placed into any widgetized area provided by your theme.
2. Although these widgetized areas are commonly called 'Sidebars' and are quite often located in the left or right-hand column, they can be also located anywhere within your site and are entirely dependent on the current theme as to their location.
3. Lots of themes use these widgetized sidebars in the footer area.
4. There are numerous widgets available by default which allow you to add extra content to your site, such as Recent

Comments, Categories or Custom Menus.

5. New Widgets can also be installed via plugins and again, depending what the plugin is used for the extra functionality it brings to your site will vary.
6. The Available Widgets section contains all the widgets you may choose from.
7. To populate one of your Sidebars, drag and drop a widget to the desired location.
8. Once the Widget is dragged to a Sidebar, the widget will open up to allow you to configure its settings.
9. Click the Save button within the Widget to save your settings.
10. If you want to remove a widget from a Sidebar but save its settings for future use, drag it into the Inactive Widgets section.
11. If you simply want to delete the Widget from your Sidebar, click the Delete link within the Widget.
12. The small arrow next to the Sidebar title will toggle the sidebar open and closed.
13. If you drag and drop a widget onto a closed sidebar, the

sidebar and widget will automatically open.

Updating the Menu

1. If your theme supports custom menus, you can make modifications to them from the Menu option.
2. Menus can contain links to Pages, Posts, Categories, Custom Links or other content types.

Adding a New Menu

1. Depending on the current Theme being used, your site may make use of more than one navigation menu.
2. Sometimes you might have multiple menus in your site header, other times you may even have menus located in the sidebar or footer of your site.
3. To add a new menu, hover your cursor over the Appearance menu option in the left-hand navigation menu and in the fly-out menu, click the Menus link.
4. Alternatively, click the Appearance menu option and then click the Menus link underneath.
5. On the screen that's displayed, click the create a new menu link.

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6. Enter a name for your new menu in the Menu Name input field.
7. Click the Create Menu button to create your new menu.

Editing an Existing Menu Item

1. Your current list of menu items resides in the right-hand column on the menu screen.
2. If there are multiple menus on your site, there will be a dropdown list displayed at the top of the page that enables you to select the menu that you would like to edit.
3. Select the menu you would like to edit from the Select a menu to edit dropdown list and then click the Select button.
4. The menu items for your selected menu will then be displayed.
5. The items in this right-hand column on the Menus page will match the menu items that appear on your website.
6. Clicking on the down arrow next to each menu item name will show an options panel for that particular menu item.
7. In this options panel, there are several items that can be updated.

8. You can show or hide extra fields such as Link Target, CSS Classes, Link Relationship (XFN) or Description using the Screen Options tab at the very top-right of the screen.
 - a. URL – Only displayed for Custom Links and will contain the URL to navigate to when that menu item is clicked
 - b. Navigation Label – This is the label that will display within the actual menu on your website
 - c. Title Attribute – This is the tooltip that appears when the mouse cursor hovers over the menu item.
 - d. Open link in a new window/tab – (Hidden by default) You can set the menu item to open in the same window or tab (which is the default) or in a new window or tab. This option is made visible by ticking the Link Target option on the Screen Options panel.
- e. CSS Classes – (Hidden by default) Optional CSS Classes to add to this menu item. This option is made visible by ticking the CSS Classes option on the Screen Options panel
- f. Link Relationship (XFN) – (Hidden by default) Allows for the generation of XFN attributes so you can show how you are related to the authors/owners of site to which you are linking. This option is made visible by ticking the Link Relationship (XFN) option on the Screen Options panel
- g. Description – (Hidden by default) The description for the link. This may or may not appear, depending on the theme This option is made visible by ticking the Description option on the Screen Options panel.

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9. Each menu item can be moved to a new location in the menu hierarchy by using either the links underneath the Title Attribute input field or by clicking on the title area of the menu item and dragging 'n dropping the menu to new location.
10. If you choose to drag 'n drop your menu items, the cursor will turn into a four-pointed arrow when you're hovering over the correct area.
11. After making updates to your menu items, click the Save Menu button at the top or bottom of the screen.

Adding a New Menu Item

1. By default, only the Pages, Custom Links and Categories panels are shown. If you'd like to add Posts, Tags or Post Formats as menu items, you simply use the Screen Options tab at the top-right of the screen to enable these panels as well.
2. To add a new Page as a menu item, tick the checkboxes in the Pages panel, next to each of the Pages that you'd like to add. You can select one Page at a time or multiple.

3. After selecting your Pages, click the Add to Menu button.
4. The new menu items will append to the bottom of the current list of menu items. The menu item name will default to the Page name.
5. To change this, simply click on the down arrow next to the menu item name to view the options panel and then update the Navigation Label to your preferred name.
6. After making your updates, click the Save Menu button at the top or bottom of the screen.
7. The steps to add a Post, Post Format, Category or Tag as a menu item are exactly the same as adding a Page.
8. To change the order that the menu options appear in, simply place your cursor over the title area of the menu item you'd like to move.
9. When the cursor changes to a four-pointed arrow, click and drag the menu item to its new location.
10. Depending on how your menu is configured within your theme, it's even possible to

create the multi-level hierarchy required for dropdown menus.

11. After moving your menu items around, don't forget to click the Save Menu button at the top or bottom of the screen to save your changes.

Adding a Custom Link Menu Item

1. Use the Custom Links panel to add a custom link to your menu, such as a link to an external website. Simply type in the website URL in the URL field and the menu name in the Link Text field.
2. Click the Add to Menu button when done.
3. Use the same steps outlined previously to adjust the order of the menu item and click the Save Menu button at the top or bottom of the screen to save your changes.

Deleting a Menu Item

1. To delete a menu item click on the down arrow next to the menu item name to view the options panel for that item and then click the Remove link.
2. After making your updates, click the Save Menu button at the top or bottom of the screen.

WordPress

Managing Menu Locations

1. After you create a menu, you also need to tell WordPress where to use it. This is where the Manage Locations tab on the Menus page comes in.
2. You may have one menu location or you may have multiple, depending on the Theme currently in use. Your menu location won't necessarily be called 'Primary Menu' either, as shown below.
3. Again, that will depend entirely on your Theme.
4. Assign an existing menu that you've created to the appropriate location by selecting it from the dropdown list.
5. Click the Save Changes button to save your changes.
6. Alternatively, you can choose to create a new menu and automatically assign it to the location by clicking the Use new menu link.

Header

1. The Header menu option will only be available if your current Theme is making use of this option. It allows you to choose an image (or if your theme

supports it, a video) to display in the header area of your site.

2. Clicking the Header menu option will take you to the Header Media panel in the Customizer.
3. You can select one of your previously uploaded images or you can upload a new image by clicking the Add new image button.
4. To save your changes, click the Save & Publish button at the top of the page. Background

The Background Menu Option

1. Another theme specific menu. It allows you to choose a background image for your site. Clicking the Background menu option will take you to the Background Image panel in the Customizer.
2. You can select one of your previously uploaded images or you can upload a new image by clicking the Select Image button.
3. To save your changes, click the Save & Publish button at the top of the page. "

Editor

1. The Editor menu allows you to edit the individual CSS and

PHP files which make up your Theme.

2. Normally once a theme is installed and configured on your site, there's no need to make any changes within here.
3. **Extreme care should be taken with this option** to avoid making changes to files that will affect how your site is displayed.
4. Incorrectly modifying any files within this section can cause your site to display incorrectly or at worst, not at all.
5. Modifying your theme files can drastically change how your site displays and depending on what gets changed, can even stop your site from displaying altogether.

Plugins

1. Plugins extend and expand the functionality of WordPress.
2. Once a plugin is installed, you may activate it or deactivate it here.
3. You can search and install new plugins by clicking on the Add New button at the top of the page or the Add New link in the left-hand navigation menu.
4. Click the Activate link to activate it.

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5. Depending on the plugin, you might also find that there are settings that need to be configured.
6. Activated plugins will be displayed with a different colored background within your list of plugins.
7. If any of your installed plugins have available updates, a small number will appear next to the Plugins menu option.
8. Prior to updating a plugin, it's wise to verify that the plugin functionality hasn't changed significantly as to adversely affect your site.
9. It's also recommended to check that the plugin and your site still works as expected, once it has been updated.
10. When you click the update now link just below the plugin description, the plugin will automatically update whilst you remain on the Plugins page.
11. You will be notified when the plugin has completed updating.
12. If you have plugins that have been deactivated because you're no longer using them, it's good practice to remove them from your site.

13. Delete plugin by clicking the Delete link underneath the plugin name.

Adding a New Plugin

1. Click on the Add New link in the left-hand navigation menu or the Add New button at the top of the page.
2. The Add Plugins page will display a list of the current featured plugins from the WordPress.org Plugin Directory.
3. You can use the links at the top of the page to filter the results,
4. To view more information about a particular plugin, click the thumbnail image, the plugin name or the More Details link. "
5. After clicking the Install Now button, the plugin will be automatically downloaded to your site and installed. You are then given the option to activate the plugin or return to the plugin installer page.
6. On the Add Plugins page, you also have the option to manually upload a plugin to your site.
7. To upload a plugin, click the Upload Plugin button at the top of the page.

8. Select your plugin file from your computer by clicking the Browse... button. Your plugin file must be uploaded in .zip format.
9. After clicking the Install Now button, your plugin will be automatically uploaded to your site and installed. You are then given the option to activate the plugin or return to the plugins page.

Users

1. This screen lists all the existing users for your site.
2. Users with roles other than Administrator will see fewer options when they are logged in.
3. Depending on your Role, you can also add new users as well as manage their Roles.
4. At the top of the screen there are links that allow you to filter the list of Users based on the User Roles. The number in brackets will advise how many there are for that particular type.
5. When hovering your cursor over each row in the list of Users, links will appear beneath the user name.

WordPress

- a) Edit – Allows you to edit the user profile.
 - b) Delete – Allows the User to be deleted. This link won't be available for your own profile.
6. A User can have one of five defined roles as set by the site admin: Site Administrator, Editor, Author, Contributor, or Subscriber.
- a) Super Admin – (Only relevant when running multiple sites from one WordPress installation).
 - b) Administrator – Somebody who has access to all the administration features
 - c) Editor – Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
 - d) Author – Somebody who can publish and manage their own posts
 - e) Contributor – Somebody who can write and manage their posts but not publish them

- f) Subscriber – Somebody who can only manage their profile

Adding a New User

1. Click on the Add New link in the left-hand navigation menu or the Add New button at the top of the page.
2. Fill in the various fields and click the Add New User button.
 - a. Username – (mandatory) Enter the username of the new user here. This will also be used as the Login name for the user. Once saved, the Username can't be changed
 - b. E-mail – (mandatory) Enter a valid email address of the new user here. The email address must be unique for each user. If a published Post or Page is authored by this user and approved comments are made to that post or page, a notification email is sent to this email address
 - c. First Name - Enter the first name of the new user here

- a) Last Name – Enter the last name of the new user in this text box
 - b) Website – You may enter the new user's website URL in this text box
 - c) Password – Clicking the Show password button will show you the password that has automatically been generated for the new user
 - d) Send User Notification – When ticked, WordPress will send your new user an email about their account
 - e) Role – Select the desired Role for this user from the dropdown list
3. WordPress will automatically generate a strong password when you create a new user. Clicking the Show password button will display the password that was generated and if you want, will also allow you to change it.

WordPress

Deleting a User

1. Click on the Delete link that appears beneath the user name when hovering your cursor over each row.
2. The Delete link won't appear for the user that is currently logged in.
3. Along with deleting the user you will be given the choice of what to do with all the content currently assigned to that User. The available choices are:
 - a) Delete all content – This will delete all the content which this user created
 - b) Attribute all content to – This will assign all the content currently linked to this User, to another User of your choosing. Simply select the User from the dropdown list
4. After making your selection, click the
5. Confirm Deletion button to remove the User.

Editing your Profile

1. Click on your user name, when viewing the list of Users or click on the Edit link that

- appears beneath your user name when
2. Hovering your cursor over each row.
 3. If you're an Administrator and would like to edit someone else's profile, click on their user name when viewing the list of Users or click on the Edit link that appears beneath their user name hovering your cursor over each row.
 4. Update the appropriate fields and then click the Update Profile button to save all your changes.

Personal Options

- a) Visual Editor – Checking this box disables the Visual Editor when writing and uses the plain html editor
- b) Syntax Highlighting – Checking this box disables the syntax highlighting when editing code in the built-in editor
- c) Admin Color Scheme – Check this radio button next to the color scheme

desired for the administrative panels. You have the choice of eight different color schemes

- d) Keyboard Shortcuts – Checking this box Enables keyboard shortcuts for comment moderation. Keyboard shortcuts are designed to allow you to rapidly navigate and perform actions on comments
- e) Toolbar – Checking this box will display the Admin Bar at the very top of your website (only for the person who is currently logged in)

Name

- a) Username – You cannot edit your Username because it is used as your
- b) Username during the login process. Even an Administrator cannot change your Username. Usually, no one else ever needs to see your Username
- c) First name – Enter your first name in this text box

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- d) Last name – Enter your last name in this text box
- e) Nickname – (mandatory) The nickname is a requirement for every user. It may be the same as your Username or it can be different. If you don't supply a Nickname, then the Username will be placed in this field
- f) Display name publicly as – Select how your name is cited on your blog, from the dropdown list.
- g) E-mail – (mandatory) All users are required to list an email address in their respective Profiles.
- h) Website – Enter your website address

About Yourself

- a. Biographical Info – Enter a short description or profile of yourself here.
- b. Profile Picture – The avatar that is displayed is called a Gravatar.

Account Management

- a. New Password – Click the Generate Password button to generate a new Strong password.
- b. Sessions – If you've left your account logged in at a public computer or you've lost your phone, you can click the Log Out Everywhere Else button to log you out of everywhere except for your current browser

Tools

- 1. The Tools menu provides some handy administration tools. Most of the time though, they're used when setting up or configuring your WordPress site and so as such, they won't be covered here in great detail.

Available Tools

- 1. The Available Tools menu option gives you access to the
 - a. Categories and Tags Converter. The Categories and Tags Converter is a tool for converting Categories to Tags or vice versa. Before it can be used it

must be installed via the Import menu option.

Import

- 1. The Import option provides you with various tools for importing content from other blogging systems. will contain your posts, pages, comments, custom fields, terms, navigation menus

Site Health

- 1. The Site Health option has two pages with information about your site.
 - a. The main Status page shows critical information and recommended improvements for your site. Clicking the arrow on each row will show more details about each item that's mentioned.
 - b. The Info page shows information on how your site is configured. This is really useful information to pass on to your support person.

Export Personal Data

The Export Personal Data option is used to export the personal data for your users.

Erase Personal Data

WordPress

The Erase Personal Data option

1. Used to erase the personal data for your users.

Settings

1. The various Settings screens are used to configure your WordPress site. Normally, once your WordPress site is set up there's no reason to change any of these settings.
2. The General settings configure your basic site preferences such as the Site Title and Tag Line, the WordPress Address and Site Address, the administrators email address and the date and time format, among other things.
3. The WordPress Address (URL) is the location of your main WordPress core files.
4. The Site Address (URL) is the address you want to use for your site homepage.
 - a. Usually these two URL's are the same but they can be different if, for example, you have your WordPress files stored in a subdirectory.
 - b. When you install WordPress, you get the option to select the

language that you'd like to use within the Dashboard. After installation, if you'd like to change the language, you can select this using the Site Language dropdown at the bottom of the page.

Writing

1. The Writing settings configure various options with regards to your site content.
2. Settings include defining the Default Post Category, Default Post Format (if supported by your Theme) and if the Link Manager plugin is installed, the Default Link Category.

Reading

1. The Reading settings configure how your site is viewed. You can define whether your front page displays a static Page or your blog Posts, how many blog posts are displayed by default as well as Syndication/RSS options. If you configure your site to display a static front page, you can set which page to display and also which page will show your blog posts.

The Search Engine Visibility Setting

1. Enables you to block your site from search engines or allow it to be visible.

Discussion

1. The Discussion settings define how your readers interact with your site and how your site interacts with other blogs. be configured on this screen as well within the E-mail me whenever section. The

Media

1. The Media settings define the default image sizes that are created when an image is uploaded.

Permalinks

1. The Permalink settings enable you to configure the URL format that is displayed in the web browser when someone browses your site. WordPress will default your Permalinks to the Day and name format however you can change this so that the URL is more user friendly. This also helps considerably with Search Engine Optimisation (SEO).
2. To change the way your site URL is displayed simply select

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one of the radio button options within the Common Settings section on this screen.

Next to each option is an example of how the URL would be displayed.

Privacy

1. With the introduction of the European Union's General Data Protection Regulation(GDPR), WordPress now makes it easier to add a Privacy Policy page to your website.
2. The Privacy settings enables you to select an existing Privacy Policy page, if you already have one.
3. If you don't already have a Privacy Policy page, you can click the Create New Page button and WordPress will create a new page for you and also populate it with some suggested text.
4. Prior to publishing this Privacy Policy page, please ensure you read it thoroughly to ensure that the content accurately reflects your website and policies. This pre-populated content also includes several blank sections which are recommended to be filled in.

5. Your selected Privacy Policy page will be shown on your Login and Registration pages.
6. It's also recommended that you add a link to your Privacy Policy on every page of your website.

Keeping your Site Updated

1. From time to time, themes, plugins & WordPress will require updating. Updates typically happen when developers release security patches or add extra functionality.
2. It's good practice to keep your themes, plugins & WordPress version updated to the latest versions. The top two reasons for sites being hacked are insecure passwords & outdated (vulnerable) software.
3. In an effort to promote better security and to streamline the update experience,
4. WordPress will automatically update itself, if it's able to, whenever a minor version is released (e.g. v5.1.1, 5.2.1).
5. These minor releases are usually for maintenance and security purposes or translation file updates.

6. Your themes or plugins won't be automatically updated.
7. Once your site is auto-updated your site administrator will be notified by email. If your WordPress installation can't update itself automatically for one reason or another, your site administrator will be notified of this as well.
8. To update your WordPress version manually or to update your themes and plugins, hover your cursor over the Dashboard menu option in the left-hand navigation menu and in the fly-out menu, click the Updates link. Alternatively, click the Dashboard menu option and then click the Updates link underneath.
9. The Updates page is divided into three sections. If your version of WordPress requires updating, this will be displayed at the top of the page. Below that, you'll be notified of any plugin updates and below that again, theme updates.
10. Updating your WordPress version is as simple as clicking the Update Now button.

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11. Before updating your site, it's always wise to perform a backup first, just in case something unfortunate happens during or after the installation.
12. To update your plugins, tick the boxes next to each of the plugins you wish to update and then click the Update Plugins button.
13. If there are any themes that can be updated, these will be listed in the Themes section on the page.
14. To update your themes, tick the boxes next to each of the
15. themes you wish to update and then click the Update Themes button.
16. After your site has been updated, no matter whether it's been done automatically, manually or just themes and plugins, it's a good idea to give your site a quick test to make sure it's functioning as expected. This will ensure that the new themes, plugins or even WordPress itself hasn't introduced new functionality that adversely affects your site or changes how your site operates.