



WordPress Website Administration Guide

NON-PROFIT & GOVERNMENT COMMUNICATIONS

WordPress Website Administrative Guide

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About YugiiDesignGroup

YugiiDesignGroup, a San Diego-based software and web development firm, caters to the media and communication needs of government agencies and non-profit organizations. With over 15 years experience in software design, product development, and idea-to-execution delivery, we specialize in creating proprietary software solutions for topics ranging from transportation demand management to GIS-based program solutions. For more information, or to contact us directly, go to www.yugiiDesignGroup.com.

WordPress Website Administrative Guide, V1.0

August 2009

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ICON KEY Valuable information Special note Online resource

Using WordPress : An Introduction








The concept of using a web-based content management system (“CMS”) like WordPress is fast becoming one of the best, efficient methods of mobilizing your audience to action through Web 2.0 means. A CMS like WordPress (“WP”) is fundamentally different from more archaic development programs like Adobe Dreamweaver, Microsoft FrontPage, and Adobe ColdFusion if only for the fact that they enable everyday users to interact with site content and eliminate the need for costly, if simple, site updates.

In the past, site updates were necessary since using proprietary site-builder software required mastering languages and code like HTML, CSS, and XML. Changing out graphics or just updating a contact page could easily turn into a costly ordeal.

It is for these very reasons that we have chosen WordPress as our primary means of developing your new site. It is a hierarchically-structured pre-packaged system that lends itself well to plug-ins, updates easily for non-technical staff, and has a robust user support community.

Why We Love WordPress

In a nutshell, WP is one of the most user-friendly solutions available.

-  It is easy to learn,
-  It has an evolving, stable support platform,
-  It is widely used (currently nearing 4 million downloads),
-  It is simply, flexible, and chronologically/hierarchically structured,
-  It has a wide range of plug-ins that can add new features to your site,
-  It is scalable and developer-friendly; themes and templates can be literally cracked open and modified, and
-  WordPress community forums are common and well-informed means of finding answers to question relating to your site administration (“Admin”).

A CMS is a software package that allows non-technical staff to quickly update your new site.

Familiarizing Yourself with the WP Interface

Step 1: Log In

The first step to working with content through WordPress is logging in. At the bottom left- or right-hand side of you website, you will see the phrase “Log In” or “Site Admin.” Clicking on this link will take you to the page you see below:

DYNAMIC VS. STATIC

Dynamic content refers to that which is refreshed constantly in some way, i.e. video and streaming audio. Static content is non-mobile, and includes graphics and single text entries.



Online

Resources Make sure you have the latest Adobe Flash Player so you can view and upload easily. **Go to** <http://get.adobe.com/flashplayer/>.

WIDGET WHAT!?

Widgets are small snippets of code embedded in a 3rd party application (i.e. WP) that perform simple functions like visit counters, clocks, and event countdowns.

Step 2: The Dashboard

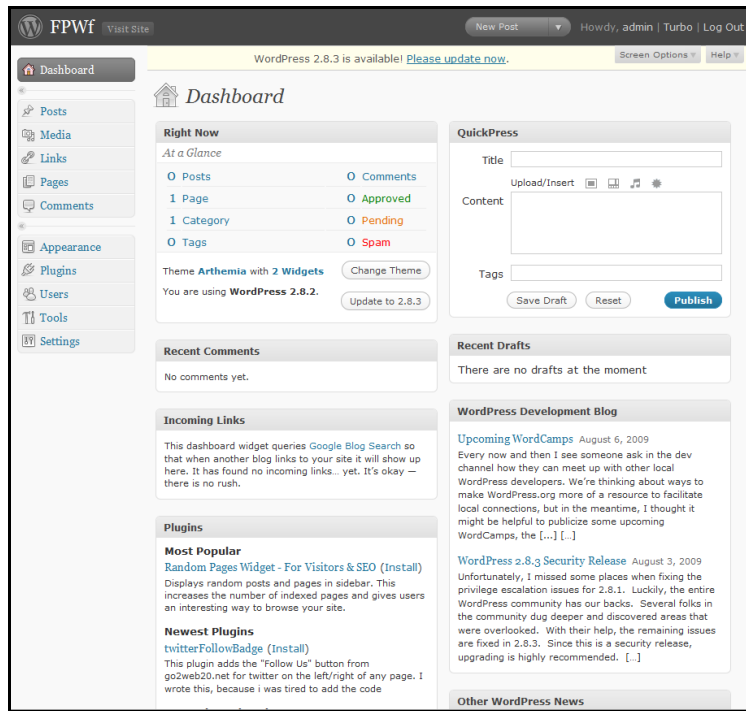
This page is a nexus for all the important links that manage your page. It may seem like there is a great deal of information, but your focus should remain on just the Pages and Posts links in the left column.

There are other links like **Media** (where you can manage your library of images, videos, and PDFs) and **Plug-ins**.

What you see will depend on the user level that has been set for your particular login profile (i.e. Admin has greatest level of access, while subscribers see less widgets).

The image to the right demonstrates an example of an Admin **Dashboard** view.

Here is a more detailed view:



As you can see, each link, denoted by (1) larger text, and (2) a image, has sub-category quick links.

Clicking on, for example, **Edit** under **Posts**, has the same function as clicking **Posts**→**Edit**.

Editing and Adding Content

All types of content can be easily edited and added within the WP Administrator interface.

The plug-in that enables you to perform actions ranging from simple “Paste from Word” to video uploading is all available through the Tiny MCE Editor (“rich text editor”). We will go over this in more detail in the next section.

Pages versus Posts

Pages are typically static entries which only require occasional editing. Using your administrator configuration, they will always be available from the homepage. If you are entering minimal dynamic content, it would be easy to make an entire site from Pages. This option is best for those *not* using chronologically or consistently updated content.



Posts form ordered, chronologically organized entry structures. Examples include news reports, blog entries, and event updates. Through the use of categories and tags, WordPress allows visitors to navigate your site more intuitively. Widgets help to highlight your content, making easier for search engines to crawl, find, and list your content.

Below you can see a screenshot demonstrating what a Page selection would look like. Note that the “About” text box would be the heading for your menu’s tool bar, and that this page would be accessible from every page on your site. After you edit content within the text editor, make sure you select **Update Page**, the blue button on the top right corner. You will notice that WordPress

Understanding Pages

Pages are for content that is less time-dependent than Posts.

Pages can be organized into Pages and SubPages.

Pages can use different Page Templates which can include Template Files, Template Tags and other PHP code.

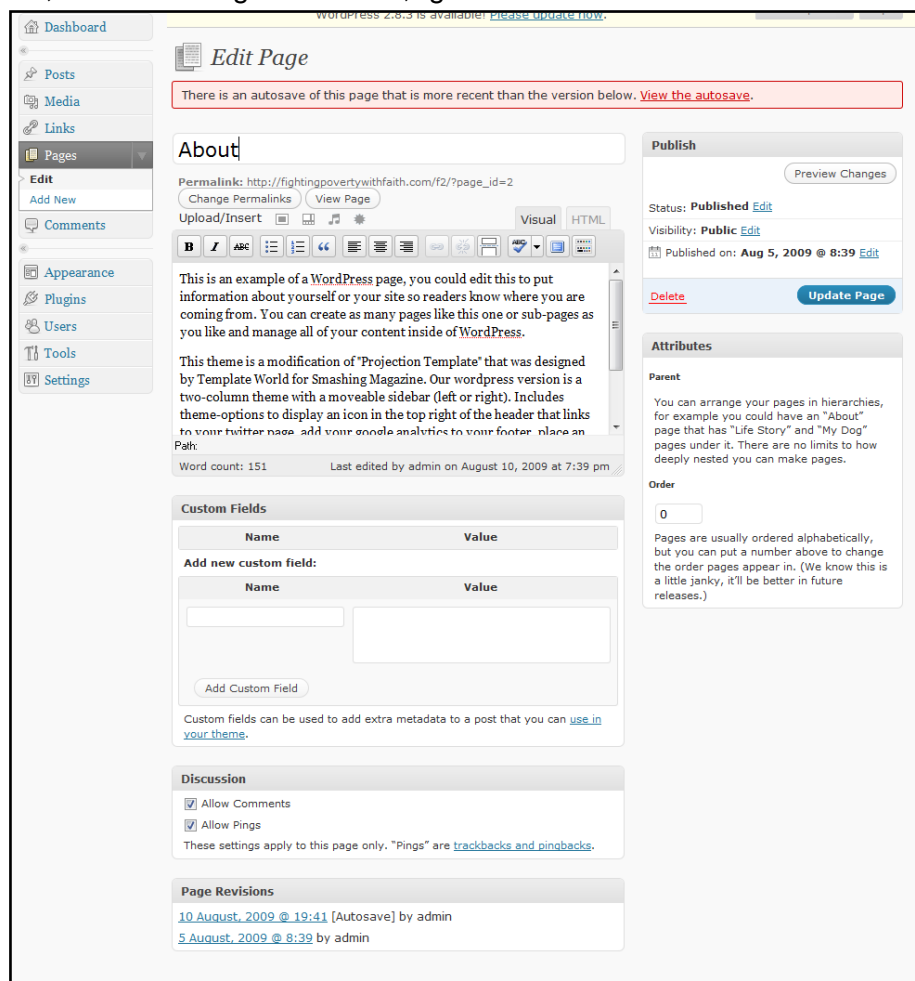
will automatically autosave your work periodically, and that these tracked changes are viewable at save time under **Page Revisions**. However, it is key to note that just as in all other word processing and content creation programs, you should *constantly* save.

The **Publish** toolbar under which **Update Page** contains two key toggles, which allow you to turn on/off the visibility and publishing of this particular page to the general public. What this means is that if you, for example change the status to **Pending Review**, or **Draft**, then the page must be either approved by an administrator or undergo final revisions prior to publishing.

Likewise, the **Visibility** option gives you a few choices as well. The final section, “Administering WordPress,” goes into more detail.

Online

Resources A detailed description of the Pages category is available at <http://codex.wordpress.org/Pages>



There are other options and links on every **Edit** page that will take you back to the Dashboard or directly to another category such as **Posts**, **Media**, **Links**, or **Comments**. Don't every be afraid to go through WordPress clicking links; just make sure you remember what, if any, options you have changed so that you can undo something you dislike.

Online

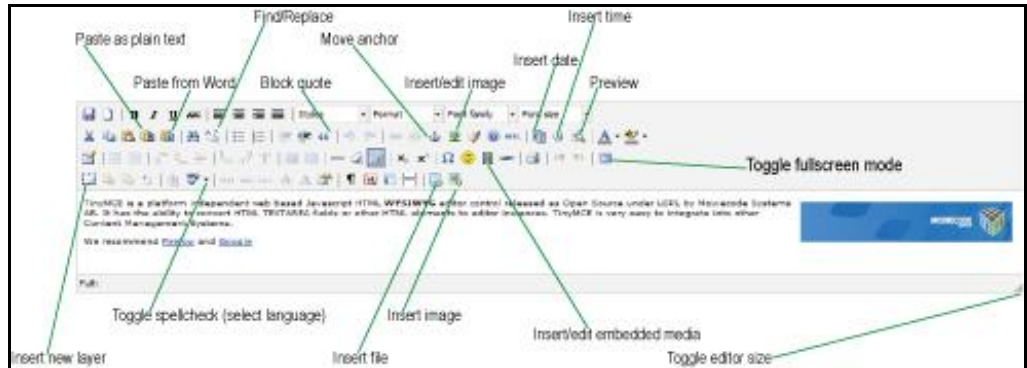
Resources

A detailed description of the Tiny MCE Rich Text Editor is available at tinymce.moxiecode.com. Check out the Forum to ask questions and provide feedback.

Editing and Adding Content

Post and Page Content

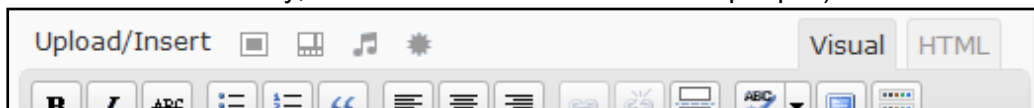
Clicking **Posts**→ (Post Selection) and **Pages**→(Page Selection) will both guide you to the respective content editor. Known as a rich text editor, your ability to add, edit, track, and upload content is virtually limitless. Below is a screenshot of the editor with a short description of the most commonly used buttons.




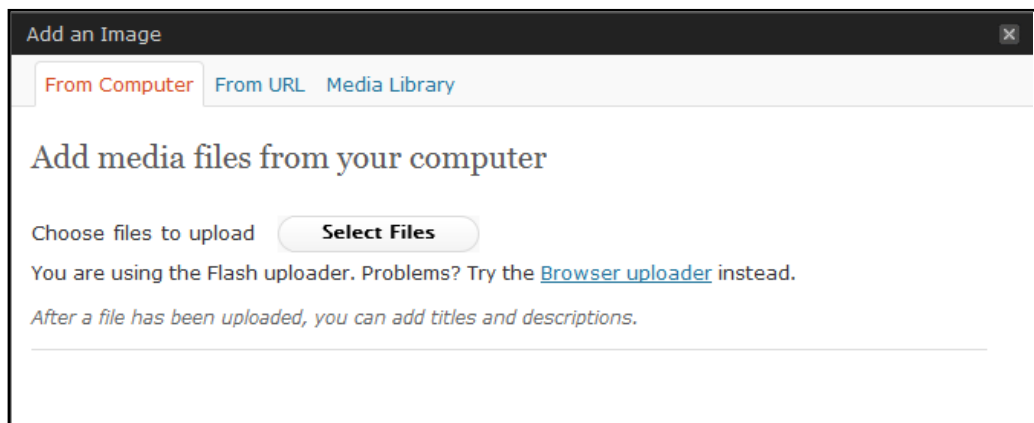
Just like in any other word processor, if you forget the meaning of a button, just hover your mouse, and a function description will pop up.

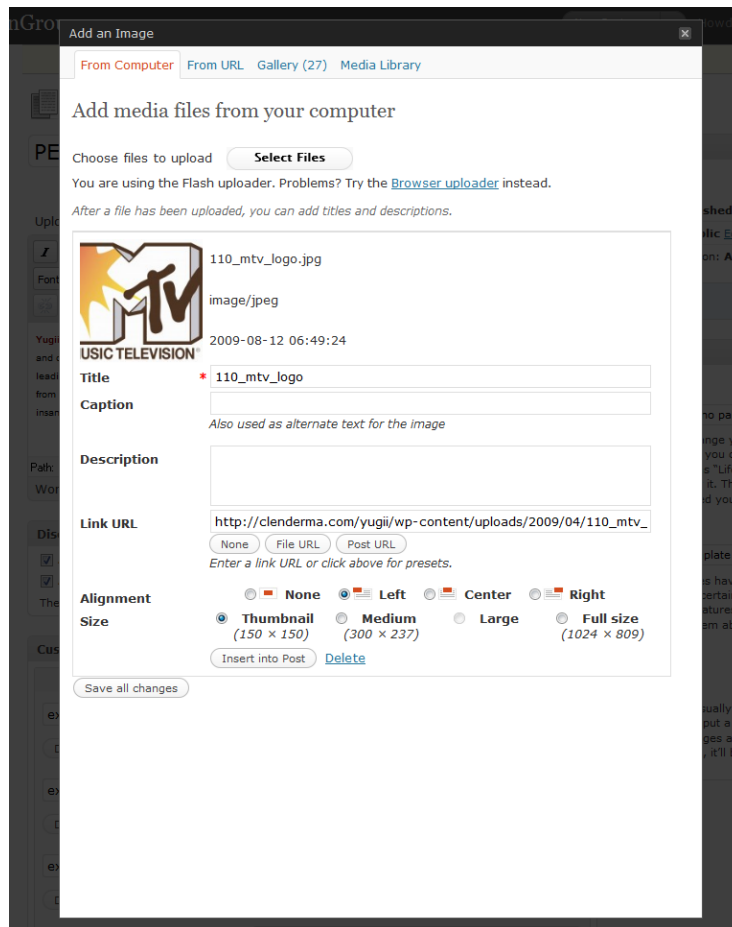
Adding Images

To create index entries for the Word automatic indexing feature, select the text to be indexed, point to **Reference** on the **Insert** menu, and then click **Index and Tables**. Click the **Index** tab. (For more information, click **Microsoft Word Help** on the **Help** menu, type **index** into the question space, and then click the **Search** button. Finally, select the “Create an Index” Help topic.)



Pressing the **Add Image** button  will bring up a pop-up window like the one below:





This dialogue provides a lot of options and controls:

Title – this is the title of the image.

Caption – the caption for the image. Shows as alternate text, but since WordPress 2.6 if your theme supports captions, it will allow you to caption your image.

Description – the description. Not used by all themes, but handy to complete and may be used further in the future. It's often just seen when you view an image as an attachment.

Link URL – this is the address of the original image you've uploaded, by default, but it also allows you to create a link to another website here – quickly and effectively. You can also press the three buttons – None, meaning the image has no link, File URL, the default, and Post URL which will show your image within the design of the site rather than as an image on its own.

Alignment – This allows you to set how the image is aligned. The small icons show the effect on the text wrapping.

Size – you'll want to choose how big the image is. If it's not too massive, you can use the Full Size image –just make sure it fits into the space available. Otherwise, a Thumbnail, by default is a 150x150px square, and Medium is cropped to fit in a 300x300px space.

Once you've selected your options, you press the Insert into Post button to add the image to where your cursor was when you chose to Add Images. In this example we've gone for a thumbnail to the right, with a caption. In the editor it now looks like this:

Administering WordPress

This section describes the range of tasks that usually carried out only by Administrators.

Managing Users

WordPress has the incredibly useful ability to define different levels of users. It doesn't have the level of power that you get with full content management systems where tens of pages of content are being created daily. However, managing users in a complex system can quickly become a full time job and the level of control in WordPress is usually perfect for the smaller organization. You have five levels (roles) of user:

- (1) Administrator** The very highest level of user – the Administrator can do anything other users can do, as well as:
 - a) Change all settings
 - b) Switch themes
 - c) Activate & edit plug-ins
 - d) Edit users
 - e) Edit files
 - f) Manage options
 - g) Import
- (2) Editor** We recommend that the highest level that someone is assigned is Editor – even the administrator will find that the Editor level is adequate for most tasks while preventing the possibility of inadvertently making a critical change to the site. An Editor can do anything a lower level of user can do as well as:
 - a) Moderate comments
 - b) Manage categories
 - c) Manage links
 - d) Enter unfiltered html (as in html with any content at all – a potentially dangerous facility!)
 - e) Edit published posts
 - f) Edit other contributor's posts
 - g) Edit pages
- (3) Author** Most people creating content through posts on the website will be Authors. An Author can do anything a lower level of user can do as well as:
 - a) Upload files
 - b) Publish posts
- (4) Contributor** A contributor really doesn't have a great deal of power. Contributors can create and edit their own posts, but they can't upload images. They can still insert images that have already been uploaded.
- (5) Subscriber** A subscriber can read content on the website and make comments. Although depending on your settings for your site, it's possible for non-subscribers to make comments also.

Managing Options and Settings

The WordPress software allows you to control many settings on your website. Click on **Settings**, and you will see seven links, within which you can change many options. Most are clearly explained on the control panels, but for extra detail we believe you may find useful the definitions below:

General allows you to set the title of your website, its tagline, URI (the web address) information and date representation.

Writing sets the various options surrounding how you can write posts.

Reading displays settings for reading the website –i.e. how many posts will be shown at a time on a page. It also sets options for syndication – this is a system that allows people to use readers to access your information remotely.

Discussion sets options relating to how people can make comments (permissions).

Privacy sets up how the site is seen by search engines. However, hiding from Google doesn't mean every search engine will skip you. Some bypass your options – with the result being that your site can still be indexed – so your content isn't ever 100% private.

Permalinks are a way of structuring your website so that the address to an article makes some sense to humans and search engines. So instead of www.website.com/?p=101 the permalink could read www.website.com/index.php/news-feature as defined in the post's slug (created when writing, or automatically from the title). You may need to modify a file on your system called `.htaccess` – if in doubt, simply ask your administrator or friendly techie to help.

Miscellaneous sets the uploads folder for organization of uploads by month and year.

Customization and Maintenance

This user guide is by no means an exhaustive description to using WordPress. Instead, it is aimed at getting you started, and hopefully, piquing your interest in continuing to use WP as your development platform.

A favorite aspect of using WP is the ability to programmatically contribute to its evolution and creative development, so don't hesitate to turn back to us at any time. Thank you for reading this manual, and if you have any questions, our contact information can be found at the beginning of this guide. Enjoy!