

Maintaining your WordPress site



WordPress basics

What is a content management system?

Most modern websites are built on a Content Management System (CMS), which is software that is used to create and manage a site's content. A CMS uses a database to store content, making it easy to update or add to your site. WordPress is one of many content management systems available.

Themes and how your site looks

A content management system has the advantage of separating presentation (how your site looks) from content (the pages and information on your site). The database holds the content, and the look and feel is determined by the theme files created for you by SAI Digital. That means that when you update your content, you don't have to worry about accidentally changing the colors, design or look of your site.

The WYSIWYG text editor

If you have used a word processing program like Microsoft Word, you already know how to edit your site's content in WordPress. Using what's called a What You See Is What You Get text editor, you'll be able to make text bold or italic, insert links and easily copy and paste, all without having to know any HTML. WordPress has two editor modes, Visual and HTML. Unless you know HTML and need to make advanced changes, always make sure you choose the Visual editor tab.

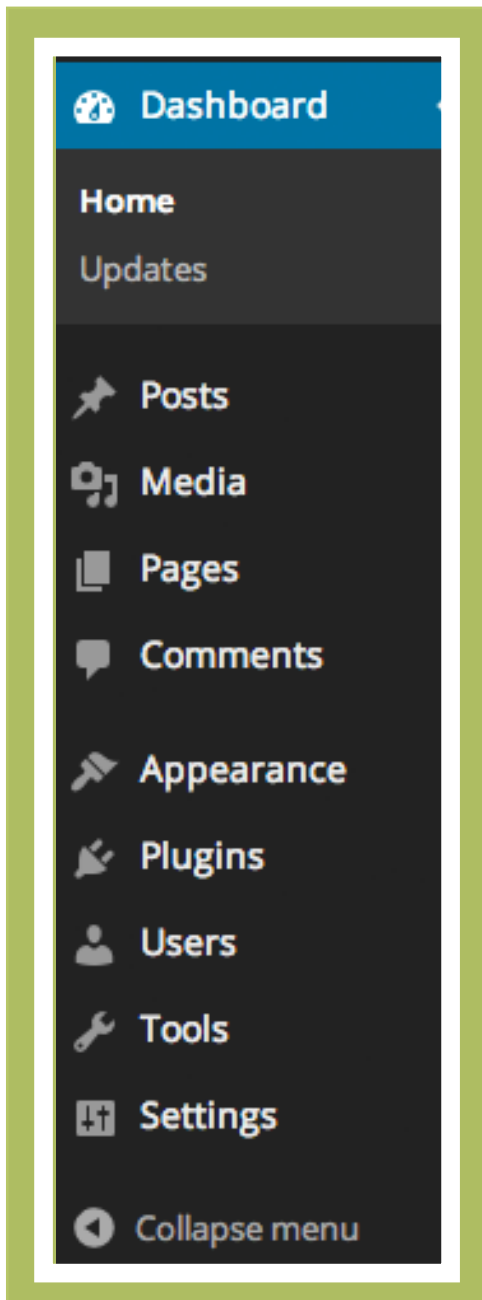
The difference between pages and posts

Most content in WordPress is classified as either a page or a post. Pages are used for content that won't change often, such as your "about us" or "contact" pages. Posts are generally used for news or blog posts. By default, your site's visitors can comment on posts (but not pages), and you can assign posts to categories. Posts also allow tags, which are a list of words to classify the content. For example, a post about the movie "Star Wars" could be in the category "movie" with tags like "sci fi," "adventure," "space" and "classics."

Site Login Information

Navigating the admin area

You will manage your site through the menu options on the left-hand side of your administration area, or dashboard. Let's take a look at each section in the standard WordPress installation:



Dashboard — Click on the main menu item to return to your dashboard home. You'll also notice an "updates" link here. If there are available updates to your WordPress installation or plugins, there will be notices here.

Posts — Click here to see a list of all the posts on your site. In this menu section you can also start a new post, manage your post categories and see your tags.

Media — If you want to see all the pictures and other media you have uploaded to your site, click on the "media" menu. You'll find a list of all your media, with thumbnails and information about the post or page each is attached to.

Pages — Click this to see a list of your site's pages. The submenu includes an option to create a new page.

Comments — Click here for a list of all the comments left on your site's posts, or to moderate comments. If there are new comments that need attention, a number will display in the menu.

Appearance — For the most part, you shouldn't need to use this section. However, if you need to change something in your site's menu, that option can be found here.

Plugins — The plugins that allow for added functionality are managed here. However, it's best if you don't make any changes. This menu item can be ignored.

Users — You can see a list of your site's users by clicking here. There are also options to add a new user and update your profile and password.

Tools — Ignore this. You won't need to use it.

Settings — SAI Digital has already optimized all your site's settings, so ignore this menu.



Quick tip!

Not all sites have the same admin menu options

Depending on the custom functions or plugins on your site, your dashboard may have menu items not listed here. We will explain any extra options you need.

Working with pages

Think of pages as the backbone of your site. Pages are used for content that won't change often, such as your "about us" or "contact" pages. They generally don't allow comments, and you don't assign them to categories.

A closer look at the page editor

If you have used a word processing program like Microsoft Word, you already know how to edit your site's content in WordPress. Using what's called a What You See Is What You Get text editor, you'll be able to make text bold or italic, insert links and easily copy and paste, all without having to know any HTML. WordPress has two editor modes, Visual and HTML. Unless you know HTML and need to make advanced changes, always make sure you choose the Visual editor tab.

The screenshot shows the 'Add New Page' interface in WordPress. It includes a title field (1), an 'Add Media' button (2), a text formatting toolbar (3), and tabs for 'Visual' and 'Text' editors (4). The main text editor area (5) is currently in Visual mode. On the right sidebar, there is a 'Publish' box (6) with buttons for 'Save Draft', 'Preview', and 'Publish', along with status and visibility information. Below that is the 'Page Attributes' box (7) for setting parent, template, and order. At the bottom of the sidebar is the 'Featured Image' box (8) with a 'Set featured image' link.

1. Page title / headline
2. Insert media button
3. Text formatting options
4. Toggle Visual and HTML editor
5. Main text editor area
6. Publish box
7. Page attributes box
8. Featured image box



Quick tip!

Pasting from another program

E-mail or word processing programs can insert ugly formatting code. To paste from another program, click the "paste from Word" button in your formatting options area (3). Or, to remove formatting from your pasted text, just highlight it in the text editor (5) and click the button that looks like an eraser.

Editing pages currently on the site

Most of your page edits will likely be to pages that are on your site already. SAI Digital has set up your site's main pages with the content you provided, but what if you need to change that content? Easy. Just click on "pages" in the left-hand navigation in your admin area and find the page you want to edit. (If there are a lot of pages, you can use the search function above the list of pages.) Click on the name of the page, and you'll be taken to the WordPress WYSIWYG editor. This should look familiar to anyone who has used a word processing program. Make your changes in the editor (5), then click "update" in the publish box (6). You should now see a message confirming the page was updated. You can click the link in that message to see your updated page.

See how your edits look before applying them

WordPress allows you to preview your changes before you make them live. Just make your edits, then click on "preview" instead of "update" (6). If you like the way it looks, go ahead and finish updating your page. If you don't like it, you can simply undo your changes and try again.

Adding new pages

At some point you may want to add a new page to your site. When that happens, click on the drop-down arrow in the "pages" menu on the left-hand side of the admin area. There, you'll find an option to create a new page. Enter your title (1), then type your content in the main editor section (5). When you're done, click "publish" in the "publish" box (6) to create the page. You'll probably want to add the page to your menu; to learn how to do that, see the "Updating your menus" section of this guide.

Parent/child pages

If your site has a lot of pages, you will likely want to organize them, but pages don't use categories. Instead, you can use the "parent page" option to organize your content. For example, your organization may have an "about us" parent page, with child pages including "history" and "board of directors." You can specify a parent page in the "page attributes" box (7). You can nest your pages several layers deep, but don't go crazy. Two to three levels is plenty.

Choosing page templates

Your site's design may include several different page templates to allow you to easily change the layout of the content. Common page templates can include a layout with no sidebar, or one made specifically for parent pages to list all children. Choose your page template under Page Attributes (7).

Inserting photos

If you want to include a photo on your page, simply click on the photo icon next to "upload/insert" (2). You can then upload a picture, choose its alignment and insert it onto your page. Learn more in the "Working with images" section of this guide.

Working with posts

Posts are news or blog articles that help keep your site dynamic. They allow comments, and can be organized into categories and classified with tags.

A closer look at the post editor

The screenshot shows the WordPress 'Add New Post' editor. It includes a title field (1), an 'Add Media' button (2), a text formatting toolbar (3), and toggle buttons for 'Visual' and 'Text' editors (4). The main text editor area is (5). Below it is an 'Excerpt' field (6) with a description of its purpose. The 'Discussion' section (7) has checkboxes for 'Allow comments' and 'Allow trackbacks and pingbacks'. On the right sidebar, the 'Publish' box (8) contains 'Save Draft', 'Preview', and status/visibility options. Below it are 'Categories' (9) and 'Tags' (10) sections. The 'Featured Image' section (11) and the 'Author' dropdown (12) are at the bottom of the sidebar.

1. Post title / headline
2. Insert media buttons
3. Text formatting options
4. Toggle Visual and HTML editor
5. Main text editor area
6. Excerpt entry area
7. Turn comments on/off
8. Publish box
9. Categories box
10. Post tags box
11. Featured image box
12. Choose post author



Quick tip!

How to schedule a post

By default, when you click “publish,” your post will go up immediately. But what if you want to set the post to go live sometime in the future? You can do that by clicking “edit” next to “publish immediately” in the “publish” box (8). Then just set the date and time your post will go up.

Adding a new post

Click on the drop-down arrow in the “posts” menu on the left-hand side of the admin area. There, you’ll find an option to create a new post. Enter your title (1) then type your content in the main editor section (5). Save often (8)! Choose categories (9) and a featured image (11), and enter tags (10) and your excerpt (6). When you’re done, click “publish” in the “publish” box (8) to create the post.

See how your post looks before publishing it

WordPress allows you to preview your changes before you make them live. Enter your content, then click on “preview” instead of “publish” (8). If you like the way it looks, go ahead and finish creating your post. If you don’t like it, you can simply undo your changes and try again.

Selecting a featured image

Notice how a small photo shows up next to your posts in your news or blog area? That’s done through the “featured image” function of WordPress, and selecting a featured image is an important step in publishing a post. There are two ways to choose a featured image. First, when you upload an image (2), you can click “use as featured image” before clicking the “insert” button. Or, click on the “set featured image” link in the “featured image” box (11) and upload your picture.

Using categories and tags

It’s important to choose categories to keep your posts organized. An entertainment website could have categories like “movies,” “TV,” “music” and “books,” for example. Each post should be assigned to at least one category, and could go in multiple categories. You can create categories on the fly in the “categories” box (9) while you’re adding a new post, or you can manage your categories in the “posts” submenu in the left-hand administration menu. Tags are different from categories. You may have one or two categories, but several tags to describe the post. For example, a post about the movie “Star Wars” could be in the category “movie” with tags like “sci fi,” “adventure,” “space” and “classics.” To add tags to your post, type the tags — separated by commas — in the “post tags” box (10). If you want to see the tags you’ve used before, you can click “choose from the most used tags.”

Setting an excerpt

An excerpt is a concise, hand-crafted summary of your post. Setting an excerpt (6) allows you to control exactly what preview text is displayed in areas like your “latest news” page. It’s best to stick to a couple of sentences that make the reader want to click through to read the rest of your post.

Inserting photos

If you want to include photos in your post, simply click on the photo icon next to “upload/insert” (2). You can then upload a picture, choose its alignment and insert it onto your post. Learn more in the “Working with images” section of this guide.

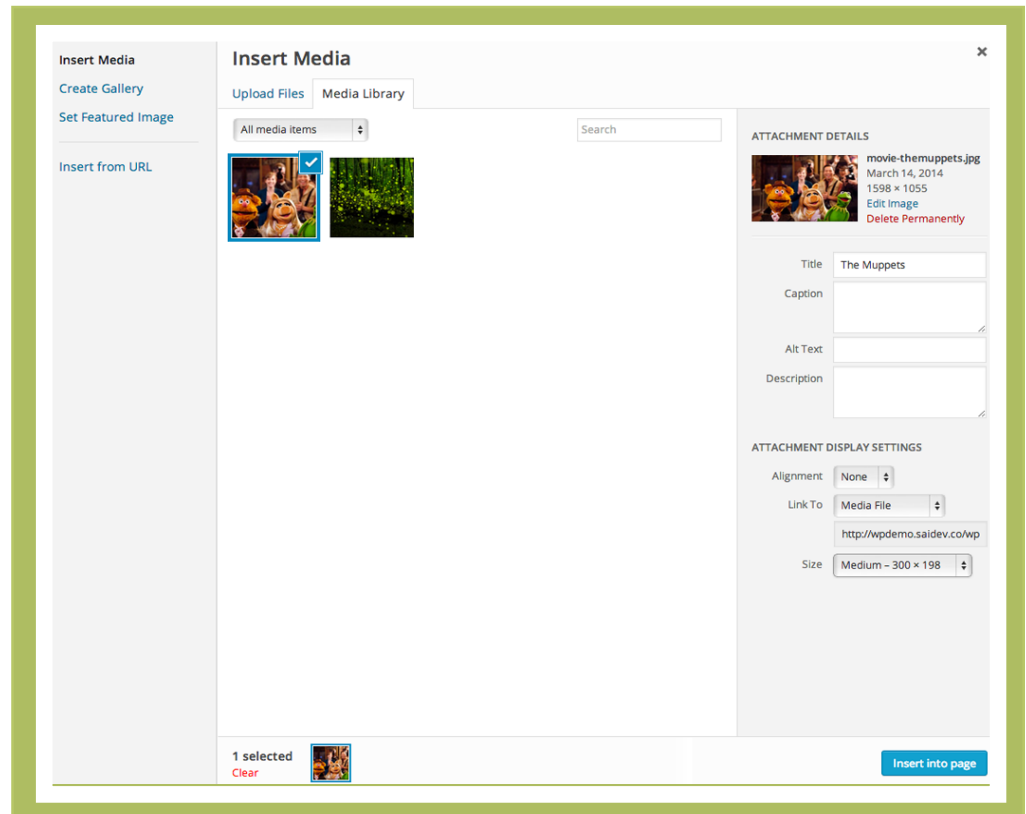
Working with images

Adding a picture to a page or post

If you want to include photos in your post or page, put your cursor where you want the picture to be, and click on the Add Media button above your editor. To upload a photo, click “Upload Files” and navigate to your image on your computer (or just drag it onto the uploader). After the upload is complete, a set of options for the image will pop up (see right).

The alternate text field allows you to specify the description used by screen readers for low-vision site visitors. If you want a caption to display with your image you can set it here, but if you don't need one, feel

free to ignore it. Do you want your site's visitors to be able to click on the image and see the full-size version? If so, click “Media File” in the “Link To” area. If you don't want them to be able to click the photo, choose “none.” Pick your alignment and the size you want and then click “insert into post.”



Quick tip!

Don't use jumbo photos

You shouldn't upload giant pictures to your website, even if you want your users to be able to click to see a larger version. Before uploading a picture, open it in an image editor and shrink it to no more than 1200 pixels wide. SAI Digital can recommend some free or low-cost image editors if you don't already have one.

Alignment basics

Alignment refers to where you want the photo to show up in your post or page. If you choose “left” or “right,” the picture will display on the selected side with your text wrapped around it. Choose “center” to align the picture in the middle of your page or post. If you pick “none,” the picture will be left-aligned and the text will not wrap around it, but will show up under.

Picking image size

WordPress automatically takes the photo you upload and creates three different sizes: thumbnail, medium and large. Thumbnail is the smallest and is generally used to link to a larger version of a photo. You will usually use medium; it’s big enough to be easy to view, but small enough that your text can still wrap around it. SAI Digital usually configures WordPress so the large image size is the max width of your default page. If you want your picture to go all the way across, choose “large.” WordPress also gives you the choice to insert a picture at original size; because the original size is often very large, it’s best to use one of the WordPress-generated sizes unless you have specifically edited your photo to be a particular size.

Using an image already in the library

You may want to use the same picture in multiple pages or posts. There’s no need to upload it every time. Just click on the Add Media button above your editor, but instead of choosing “Upload Files,” stay on the default view. You’ll see a grid of all your pictures. You can navigate this list visually, or you can search for something in particular, like “logo” or “president.” Once you find the image you want, click it to get the image options panel.

Selecting a featured image

Notice how a small photo shows up next to your posts in your news or blog area? That’s done through the “featured image” function of WordPress, and selecting a featured image is an important step in publishing a post. There are two ways to choose a featured image. First, when you upload an image, you can click “use as featured image” before clicking the “insert” button. Or, click on the “set featured image” link in the “featured image” box on the right-hand side of the page and upload your picture. Note: SAI staff will often configure WordPress so the first image you upload to a post is its featured photo. If you want to specify a different featured image, follow the directions above.

Navigating the media library

If you want to see all the pictures and other media you have uploaded to your site, click on the “media” menu in the left-hand site navigation of your admin area. You’ll find a list of all your media, with thumbnails and information about the post or page each picture is attached to. You can navigate this list visually by clicking the arrows to see each page, or you can search for something in particular, like “logo” or “president.”

Managing comments

Comments basics

By default, posts in your news or blog section will allow your site's visitors to leave a comment. Comments are a good thing — they mean people are reading your site and want to interact! But you have to monitor your site's comments. The first time someone comments on your site, you will need to approve their comment; after that, their comments will show up automatically. (If you would prefer to approve every comment, ask SAI Digital to change that setting for you.) You will receive an e-mail each time a comment is left on your site.

Moderating comments

When you are notified of a new comment, there are three actions you can take: approve it, delete it or mark it as spam. To use these options, you can click on the links in the notification e-mail. Or navigate to the comments area by clicking on the link in the left-hand menu of your admin area. There, you'll see a list of comments, including the name the commenter provided, their e-mail address and IP address, and the post the comment is attached to. Hover over the new comment to see options for approving, trashing or marking a comment as spam.

Replying to comments

If a user asks a question or if something they say needs clarification, you can choose "reply" in the comments admin area to reply directly to that comment.

Identifying spam

Sometimes it's easy to see that a comment is spam, such as when it contains questionable information or is in a strange language. But sometimes a seemingly innocent comment like "Exceptional blog post, loads of really good facts" is actually spam. How can you tell? Often, spam comments have misspelled words and they usually are not related to the actual content of the post. Many spam commenters are just trying to get links back to their own sites. This may seem daunting, but you shouldn't have to deal with spam comments often; a plugin called Akismet that has been installed on your site will stop a lot of comment spam, and requiring first-time commenters to be approved will take care of a lot of the rest.



Quick tip!

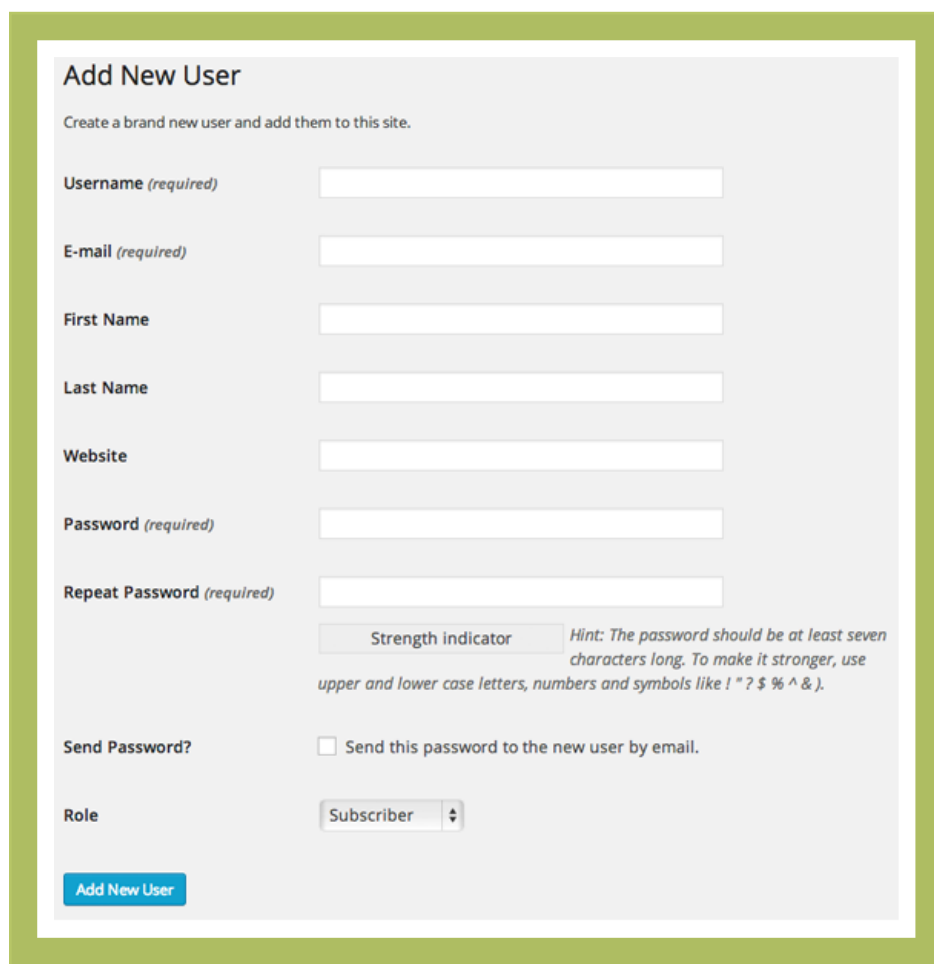
A note about editing comments

Though WordPress allows it, it's usually not a good idea to edit comments left on your site. You want visitors to interact with your site, but most people won't trust a site that changes their comments. If there is something questionable in a user's comment, it's best just to trash it.

User management

How to add users

If there are several people who will update your site, you may want to give each one his or her own login. To do that, just click on “users” in the left-hand navigation menu of your admin area. You’ll see a list of your current users, and also a link to “add new.” Assign the new user a login name, and fill out their name and e-mail address. Create a password for them (they can change it later) and choose their role. Then click “add new user.” Your new user can now log in and make changes based on their access level.



The screenshot shows the 'Add New User' form in a WordPress admin area. The form is titled 'Add New User' and includes a sub-header 'Create a brand new user and add them to this site.' The form fields are: Username (required), E-mail (required), First Name, Last Name, Website, Password (required), Repeat Password (required), Send Password? (checkbox), and Role (dropdown menu). A strength indicator is shown for the password field, with a hint: 'Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! " ? \$ % ^ & .'. The 'Add New User' button is at the bottom left.

User roles and access levels

It's best not to give everyone administrator access. It's the most powerful user role and can make major changes to the site. Instead, consider one of the other user roles, which are:

- Editor: Can publish and manage posts and pages as well as manage other users' content
- Author: Can publish and manage their own posts
- Contributor: Can write and manage posts but not publish them

How to change your password

If you want to change your password — or make other profile changes like updating your e-mail address or name — click on the drop-down arrow next to “users” in the left-hand navigation menu of your admin area. Then click “your profile” and make your desired changes.

Updating your site's menu

Menu basics

For the most part, you probably don't have to worry about changing your site's menu(s). But if you add a new page or remove one that's outdated, you may need to update a menu. To do that, click the arrow next to "appearance" in the left-hand menu of your admin area and choose "menus." Your available menus are in a dropdown; just choose the menu you want to update.

Adding/removing menu items

Once you've chosen your menu, you'll see a list of all the items in that menu. If there are submenu items, they'll be indented a bit under the main item. To remove a menu item, click the down arrow of that item and choose "remove." (Don't worry, it only removes the item from the menu; it doesn't delete the actual page, post, category, etc.) Don't forget to click "save menu." To add a new menu item, look at the boxes to the left of your menu area. Find the content you want to add, tick the box next to it and select "add to menu." Then just drag and drop to position the new item, and click "save menu."



Quick tip!

Be cautious when changing a menu

While it's a great tool, menu management is a more advanced feature in WordPress. You should only do it if you're confident you know what you're doing. Also, menu space isn't unlimited. If your menu bar is full, adding a new item will mess up your layout. If your menu needs a face-lift but you don't want to mess with it yourself, contact SAI Digital.

The screenshot shows the 'Edit Menu' interface in WordPress. At the top, there are two tabs: 'Edit Menus' (active) and 'Manage Locations'. Below the tabs, a text box says 'Edit your menu below, or [create a new menu](#).' The main area is divided into three sections. On the left, there's a sidebar with 'Pages' (expanded), 'Links', and 'Categories'. The 'Pages' section shows 'Most Recent', 'View All', and 'Search' buttons, a list with 'Sample Page', a 'Select All' link, and an 'Add to Menu' button. The main area has a 'Menu Name' field set to 'Main Menu' with a 'Save Menu' button. Below this is the 'Menu Structure' section, which includes instructions to 'Drag each item into the order you prefer' and a list of items: 'Sample Page' (Page), 'Sample Page' (Page), 'Sample Page sub item' (Page), 'Sample Page sub item' (Page), and 'Sample Page' (Page). At the bottom is the 'Menu Settings' section with 'Auto add pages' (unchecked) and 'Theme locations' (checked for 'Top primary menu', unchecked for 'Secondary menu in left sidebar'). A 'Delete Menu' link is at the bottom left, and another 'Save Menu' button is at the bottom right.