

# Word Press site training notes for THE BIG PUSH FORWARD

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## 1. INTRODUCTION - Concepts, WordPress and Page components

### *Background concepts: Domain name, Host and CMS*

- The **Domain name** (“bigpushforward.net”) specifies the web address of the site. You access it with and without the www. Site url: bigpushforward.net an
- The **Host** refers to a physical server on which all the information featured on the site is stored (text, images, documents etc.). The host is WordPress.org who also provide a Content Management System (CMS).
- A Content Management system (**CMS**) allows you to create and edit pages in a nice user friendly graphical interface, rather than writing lines of code. WordPress.com provides both CMS and hosting.

The Domain name was purchased through: <http://123-reg.net> Settings on 123-reg control panel the information used by search engines to find the site. This info can take up to 2 weeks to propagate through the net. All other content and settings are controlled via the WordPress Dashboard (see section 2.)

### *About WordPress - .com vs .org*

WordPress was originally an open-source project to create software needed for the visual and functional design of blogs. This software can be downloaded at WordPress.org. WordPress.com is run by the same people, but additionally provides hosting and software management services. An overview of the pros and cons is given below. I mention this only as it may inform decisions about the site in the future.

	PROS	CONS
<b>WordPress.com</b>	<ul style="list-style-type: none"><li>•Free and easy to set up</li><li>•Spam, backups and security are all taken care of</li><li>•No issues with high traffic</li></ul>	<ul style="list-style-type: none"><li>•Can't customise the theme</li><li>•Can't upload plugins</li></ul>
<b>WordPress.org</b>	<ul style="list-style-type: none"><li>•Can upload themes and plugins</li><li>•Complete control of underlying code</li></ul>	<ul style="list-style-type: none"><li>•More difficult to set up</li><li>•Need to pay for webhost</li><li>•Must handle backups spam and upgrades</li></ul>

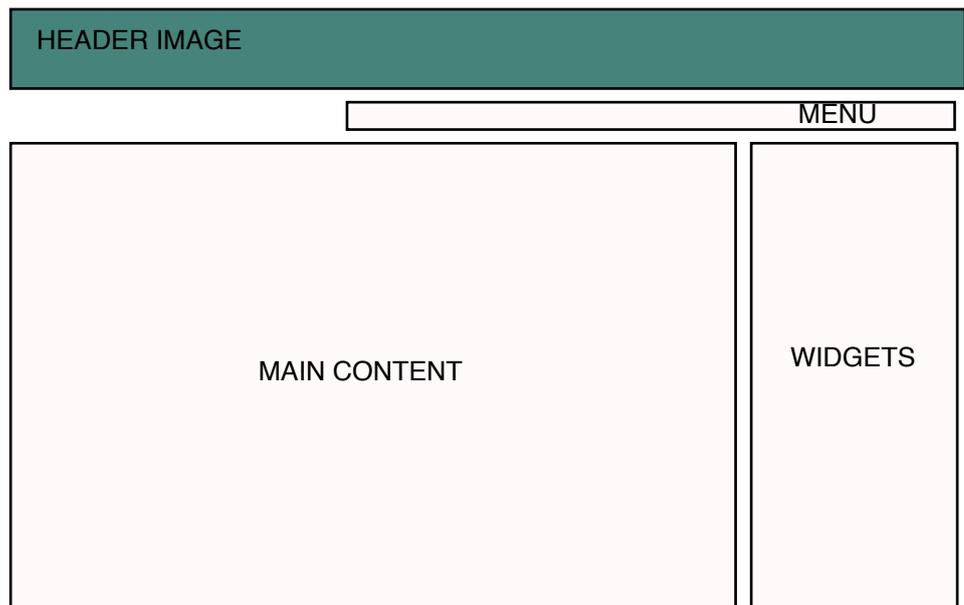
### *Anatomy of the page*

The **HEADER IMAGE** can be custom made and can link to a URL

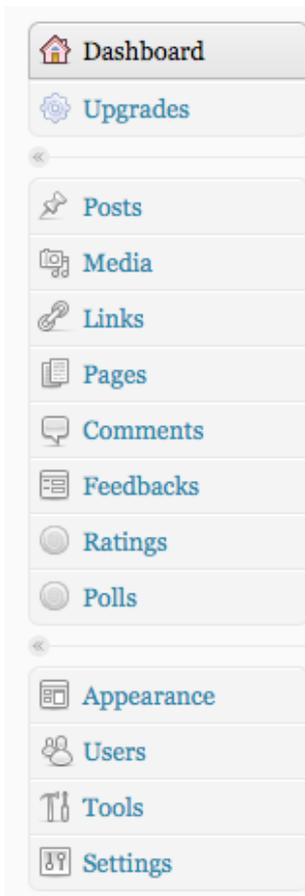
The **MENU** items can be customised to include any of the **pages** created

The **WIDGETS** can be selected from a predefined list.

The **MAIN PAGE** shows the most recent blog entry by default, or one of the pages selected from the menu.



## 2. THE DASHBOARD



The Dashboard gives you access to information about the site and to all menus for editing content, appearance and access options.

To access the Dashboard, open a browser and visit: <http://bigpushforward.net/wp-admin>

On the front page you can see a summary of pages, comments, stats etc. and also write a quick post. You can edit what is shown in this screen using the 'screen options' drop down menu on the top right of the page.

The main administration menu is in the left-hand column (shown left). Click on each one to expand the list and familiarise yourself with the items which appear there. These notes will take you through all the things you may need to do to manage and update your blog and will refer to this menu.

### General Note

When editing content, it is easiest to have two browser tabs open: one with the Dashboard open (<http://bigpushforward.net/wp-admin>) and one with site up as the public see it (<http://bigpushforward.net>). When you save content in the Dashboard, switch to the .net site and hit the refresh button to check that your updates are as you intended. Get into the habit of doing this as you will save time and embarrassing errors going live !

### 3. CREATING AND EDITING CONTENT - Media, Posts, Pages and Links

Content can be edited and created in a number of different ways:

- i. Via the WordPress Dashboard front page
- ii. Via the WordPress **PAGES** or **POSTS** menu (recommended)
- iii. Via email - this must first be set up (Go to *Settings* > *writing* in the Dashboard menu)
- iv. By clicking on the 'edit' link under each post on the main site. Note that this will only be visible when you are logged in. This is useful for small corrections - e.g. if you spot a typo.

The easiest and most comprehensive way is b - via the Dashboard menu.

#### A. Manage and Add Media

All documents that you upload (images, pdf files etc.) are stored on the WordPress server. Each will have a URL (just like the site itself) and WordPress gives these sensible, verbose names so that you can easily keep track of them.

Media can be added in the edit window when you create a Post or Page, or it can be added directly into the media library (accessed via the **MEDIA** menu in the Dashboard).

The Library (**MEDIA > Library**) gives you an overview of all media associated with the site. You can click on any item to see and edit information associated with it. This also allows you to find out its url - which is useful if you want to link to it (detailed below in the Resources section).

WordPress gives you 3GB of space for free. A typical pdf is around 2MB, so there is space for around 1500 papers.

#### B. Create or edit a Post

Typical blogs comprise a series of *Posts* - these can be given a title but appear in chronological order on the home page. Each can be categorised, and these *categories* can be used to search them easily. We've used categories to access 'points of view', 'news items' and 'new resources' - these are included as a separate menu via a *widget* in the right hand column of the site.

Posts can also have *tags* attributed to them. This might be useful for the 'Points of View' entries - for example to distinguish discussion about policy, from case studies etc. Tags can also be included in the right hand column using a *widget*, typically as a 'word cloud' where size is related to frequency.

The best way to manage and create posts is via the **POSTS** item in the main Dashboard menu.

Click on **Posts**. You will see a summary of all existing posts: author, category, stats, creation date etc. To edit an existing post, click on its name or on the 'edit' link which appears when you hover over it.

Whether you create a new post or edit an existing one, the Post you are working on appears in an edit window. You can choose between 'visual' and 'html'. The former provides the WYSIWYG format of familiar wordprocessing packages, the latter gives you direct access to the html.

To create a new post:

- i. Select **Add New** from the **POSTS** menu. A dialogue box appears. Enter the title and then click in (or tab to) the visual editing window.
- ii. Type contents directly into the 'visual' editing window.
- iii. Format content using the tool bar at the top. These formatting options should be familiar to you from text editing applications, with additional links, and media uploading facilities. Hovering over an icon with the mouse gives you some information on what it does.
- iv. In the right hand menu, select a **category** for the post (e.g. News, Points of view etc.) and add a **tag** to the post (optional)
- v. *Save* content and *publish* from the top right hand dialogue box. Alternatively, you can save a draft and preview if you are not ready to publish it.
- vi. Test it. Visit [bigpushback.net](http://bigpushback.net) and make sure all is as it should be.

### C. Create or edit *Pages*

Pages are created and edited in exactly the same way as Posts, but do not have categories or tags. Current Pages can be accessed, or new Pages created via the **PAGES** menu.

**Pages** are generally static and fixed at design time. These are accessed via the top menu (about, resources etc.). The exception of course will be the **Resources** page. WordPress is geared up for images and video etc. but not really for documents so its a little but more fiddly than adding images, but is a useful exercise in understanding where everything is kept and how it all fits together. This is as complicated as it gets !

#### **To add a new resource:**

First you must upload the new document (any file type):

- i. Go to **MEDIA > Add New** and click 'Select File' button to search your local drive.
- ii. Once the progress bar completes, a window will appear showing you the details of the document, if you are happy with the info, click save
- iii. Go to the last entry, 'File URL', and copy the link - it will be something like:  
`http://bigpushback.files.WordPress.com/YEAR/MONTH/DOCUMENT_NAME`
- iv. Click 'save'

Then you edit the Resources Page to include a link to the new document:

- i. Go to **PAGES > Pages** and click on '**Resources**' The current page will be shown in the edit window (make sure you are in 'Visual view').
- ii. Click the cursor at the end of the line above where you want to insert a new line and hit return. This will create a new bullet point (if it doesn't, you can always add one from the formatting menu).
- iii. Type the name of the paper, the author and the date (feel free to alter this convention of course).
- iv. Now create a link to the document in the media folder:
  - a. Highlight the name of the paper and click the link button (shown with red arrow below) in the formatting palette. A dialogue box will open.
  - b. In the **URL** box, paste the URL of the document which you copied from the Media Library and give the paper a name.
  - c. Check the box 'open link in a new window'
  - d. Click 'Add Link'
- v. The name of the paper should now be highlighted in purple and underlined to indicate that it is a link.
- vi. Scroll down to the bottom of the page and click 'Update'.
- vii. Test it ! Visit [bigpushback.net](http://bigpushback.net) and click the link to make sure all is as it should be.



I have currently organised papers alphabetically by title, but am not convinced that this is the best approach. If the resources list grows we may need to do something more sophisticated.

### **Create or edit Links**

Links to related sites are shown in the right hand column of your site. These can be edited via the Dashboard **LINKS** menu. To add a new Link:

- i. Click **Add New** from links menu
- ii. Enter a name - this is what will be visible in the Links menu, e.g. *Owen Abroad*
- iii. Enter the web address - including `http://` - It is best to visit the site and simply copy the address from the browser window.
- iv. Enter a short description (optional)
- v. Choose a category. In order to keep things simple and describe these as 'links' rather than 'blogroll' on your site, I have created only one category, but you must tick the 'Links' box for it to appear.
- vi. Choose the 'target' mode. I advise '`_blank`' as this will open a new window
- vii. You can ignore the 'Link relationship' info
- viii. Test it ! Visit [bigpushback.net](http://bigpushback.net) and click the link to make sure all is as it should be.

#### 4. MANAGING USERS AND COMMENTS - Users, Comments, Feedbacks, Ratings and Poll

##### A. Users

You can invite others to contribute to the site (e.g. Irene, other cluster leaders). Users can have various degrees of control. You are the administrator.

- Super Admin - Someone with access to the blog network administration features controlling the entire network ([See Create a Network](#)).
- Administrator - Somebody who has access to all the administration features
- Editor - Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
- Author - Somebody who can publish and manage their own posts
- Contributor - Somebody who can write and manage their posts but not publish them
- Subscriber - Somebody who can only manage their profile

For more on roles visit [http://codex.WordPress.org/Roles\\_and\\_Capabilities](http://codex.WordPress.org/Roles_and_Capabilities)

##### **To invite new users:**

Go to **USERS** in the Dashboard menu.

If they have a WordPress account:

- i. Enter their email address
- ii. Select their role - I suggest yourself and Irene be administrators, and all others be Authors.
- iii. Click 'add user' - they will be sent an email inviting them. If they accept they will then appear in the users list.

If they don't have WordPress accounts:

- i. Click 'invitees' and fill in form which appears, selecting 'Add user to my blog'
- ii. Once they have joined, they will appear in the users list and you can edit their role as required

##### B. Comments

Anyone can leave comments in response to posts or pages (comments on pages can be turned off in the page editing options). To prevent spam, these only appear once they've been reviewed. All settings for comments can be viewed and edited in **SETTINGS > Discussion**.

Comments can be emailed to the author of each post.

##### **To view and edit comments:**

Go to **COMMENTS** in the Dashboard menu.

New comments will appear in the 'Pending' section. You can then decide to *approve* or *trash* them.

#### 5. OTHER SETTINGS - Appearance and Access settings

##### A. Appearance

You may like to edit the **widgets** (items which appear in the right hand column). These are accessed via the **APPEARANCE > Widgets menu**

If you would like to update your personal information (image, email etc.), this can be done via **USERS > My Profile**

##### B. Access

The **Privacy** setting can be updated in **SETTINGS > Privacy**

If you would like to link to other social media (facebook, twitter etc.) you can link the site to your social media accounts (you need to set them up first) in **SETTINGS > Sharing**.

## 6. USEFUL LINKS

Useful links for more information

A useful outline and searchable introduction to all things WordPress.

[http://codex.WordPress.org/Introduction\\_to\\_Blogging](http://codex.WordPress.org/Introduction_to_Blogging)

For information on offline editing: <http://en.support.WordPress.com/xml-rpc/>

## 7. EXERCISES

None of this will make much sense until you do. When you do it will become obvious. We can do some exercises during the training session such as the following:

### 1. Log in and edit the most recent post

Try this via the Dashboard menu (POST) and also from the site itself.

### 2. Write a new post, categorize it and add new tags

Check the post and the tags on the site.

### 3. Add a new document to the resources section

### 4. Invite a new author (Irene ?)

### 5. Log out, leave a comment, then moderate it

### 6. Add your personal details (website, email etc.)

### 7. Change the Image header - then change it back again !