# Managing Your WordPress Website

## WordPress Login Information

Log into your WordPress site with the address: <u>www.domain.org/wp-admin</u> where domain is the address of your website (e.g. <u>www.lamontlibrary.org/wp-admin</u>). The Username is your library short name plus "admin" (e.g. mcgradmin or wavadmin). The Username is lower case. The admin password was originally the same as the director email passwords and was submitted at the time the websites were set up. The admin id for WordPress should be used for maintenance of the website (installing plugins, updating menus, customizing colors, changing theme settings, etc.). FLLS suggests creating individual logins to WordPress that will be used for adding and editing posts and pages

# **Dashboard**

This is the page you will see every time you login. Some important places include the menu items along the left hand side, the website link at the top left, and the settings menu at the top right.

🚯 🎢 Finger Lakes Li	ibrary System 😯 1 🔎 0 🕂 New		Howdy, Je	nny Shonk	
② Dashboard	Dashboard		Screen Options 🔻	Help 🔻	
Home Updates <b>1</b>	Site Health Status	Quick Draft			
Posts D Media Pages	Good Your site's health is looking good, but there are still some things you can do to improve its performance and security. Take a look at the <b>5 items</b> on the <u>Site Health screen</u> .	Title Content What's on your mind?			
<ul> <li>Comments</li> <li>Appearance</li> <li>Plugins</li> </ul>	At a Glance WordPress 5.4.1 running <u>ColorMag Pro</u> theme.	Save Draft			
<ul> <li>Osers</li> <li>Tools</li> <li>Settings</li> </ul>	Activity	WordPress Events and New Attend an upcoming event ne	<b>rs</b> ar you. 💋	•	

# **Best Practices**

- Google Chrome is the recommended browser for WordPress. Firefox also works well and recommended over Microsoft's browsers.
- Use headers and paragraphs and learn to use the Quote function & bulleted lists
- Use the tools in the Media gallery for positioning images. WordPress isn't a true WYSIWYG (what you see is what you get) editor, dragging images doesn't work like in Publisher.
- Formatting, don't mess with it. Consistency across the site is built into the theme.
- Try not to force odd coloring, this is also for ADA compliance.
- Try not to "break" WordPress to force formatting, it could cause problems with updates in the future.
- Learn how to use tables, they may be the best workaround for spacing and layout of a Page or Post.
- If Cut/Paste of info creates odd formatting, use the "Remove formatting" tool, it's easier than HTML coding.
- Learn some basic HTML coding.

# Creating & Editing Content

The toolbar will be available any time you are creating a new Page or Post or editing an existing Page or Post. Hover over each icon to learn what each tool does.

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#### Pages

Pages are used for static content or content that changes infrequently such as an About page, Staff Directory, Board of Trustees, Events page, or Calendar.

#### Adding a Page:

1. On your Dashboard, click on **Pages** and then **Add New**. Or click on **Pages** and then click on the title of a specific page you would like to edit or update.

Dashboard	
🖈 Posts	All (4)   Mine (3)   Published (4)   Trash (1)
<b>9</b> Media	Bulk Actions <ul> <li>Apply</li> <li>All dates</li> <li>Filter</li> </ul>
📙 Pages 🔍	Title
All Pages	About Us
Add New	

- 2. Enter your title by clicking where it says, "Add title"
- 3. Click in the text box area to begin typing and adding content.
- 4. If you are ready to go, click on **Publish** (or the button will say **Update** if you are editing a post). Click on **Save Draft**, to save your post for later.
- 5. Once a Page has been published it's live on your website. It can also be saved as a Draft until it's ready. See page 7 for instructions on how to add the page to your menu.

#### Posts

Posts go to the Blog, which is a rolling log of upcoming events, current news, or info on recent programs. It's recommended that blog posts not be deleted, rather updated if info becomes outdated. Otherwise it's a record of past events.

Blog posts should have a descriptive title, content, and should be assigned to a Category, include Tags which help identify the content of the Post, and have a Featured Image.

- Category Groups blog posts together by topic, allows Posts to be assigned to sliders
  - Use Categories sparingly
  - Can be created at time of adding a Post or by using the Categories link on the Dashboard
  - Tags Identify key points of the post's topic, helps with search on your website.
    - Relevant to the content of the Post

- Searchable by visitors
- Refer to your frequently used Tags for consistency
- Featured Image Always add a Featured Image to help with social media by providing a good image for display on sites such as Facebook. Also shows on slider.

#### Adding a post:

1. On your Dashboard, click on **Posts** and then **Add New**. Or click on Posts and then click on the title of a specific blog post you would like to edit or update.

🚳 Dashboard	Posts Add New
📌 Posts	All (1)   Published (1)   Trash (1)
All Posts Add New	Bulk Actions V Apply All dates V Title

2. Enter your title by clicking where it says, "Add title." Click in the text box area to begin typing and adding content.

Enter title here
93 Add Media
B I ↔ ☱ ☱ ↔ ☱ ☱ 글 ⊘ ⅔ □ ☲ - ⊞ ▼ 📟
Paragraph ▼ U ≡ A ▼ 🛱 🖉 Ω 🛱 🖶 ↑ / ℓ ℓ Font Sizes ▼ Formats ▼
Click here and type in your content!

3. Look to the right side of the screen or below the Post body to add or assign Categories.



4. Add tags to improve keyword searching. Under categories your will see Tags. Click in the box and type some keywords to describe your post. Make sure to separate yours tags with commas. Ex. adult services, Pinterest, crafts.

Tags		
	Add	
Separate tags with commas		
Choose from the most used ta	igs	

5. Near the bottom you can choose to set a featured image. This image will appear on the blog page and in the slider. Click on **Set featured image** and then follow the steps listed under **Media**, below.

Featured Image	
Set featured image	

 Before moving on you must save your post or publish to make it live. If you are ready to go, click on **Publish** (or the button will say **Update** if you are editing a post). Click on **Save Draft**, to save your post for later.

	Publish 🔺	
C	Save Draft Preview	
	P Status: Draft Edit	
	Visibility: Public Edit	
	Publish immediately Edit	
	Move to Trash Publish	>

7. Looking for an old post? Click on **Posts** and you will be presented with a list of posts that you have created. Click on any of the titles to access a post. You can also search for a post using the search area located in the upper right. Type in a keyword and click on **Search Posts**.

#### **Media**

Media includes images, PDF, or other documents that you need to insert into your Pages and Posts. You can add media any time by clicking on **Media** on the **Dashboard**, clicking on **Add New**, and then following steps 3-5 below. Or you can add media as needed in your Posts and Pages.

- 1. Create or organize your image or document. If you want to use a stock image, there are resources for free images on the last page.
- 2. Open the Page or Post that you would like to insert the image into. Click on Add Media.



3. Click on **Upload Files** and then **Select Files** or choose Media Library for existing images



4. Locate your image and click on **Open**.

Organize - New folder						<b>- -</b> (
<ul> <li>✓ Quick access</li> <li>✓ Desktop</li> <li>✓ Downloads</li> <li>✓ JShonk</li> <li>✓ Pictures</li> <li>✓ Directors' Meetir</li> </ul>	photo-14648658 85825-be7cd16fa d8d.jpg	photo-14682735 19810-d3fe4c125 cdb.jpg	photo-14704723 04068-4398a9da ab00.jpg	photo-14705496 38415-0a0755be 0619.jpg	photo-14711073 40929-a87cd0f5b 5f3jpg	photo-14719703 94675-613138e4 5da3.jpg
MLSG NNLM Course NNLM Course Nordpress Dropbox OneDrive	photo-15015049 05252-473c47e0 87f8.jpeg	photo-15024657 71179-51f3535da 42c.jpeg	photo-15039454 38517-f65904a52 ce6.jpeg	photo-15151807 11443-f8685c6d6 a74.jpeg	Thank You photo-15198948 77873-978b7d95 7c3d.jpeg	photo-15210792 99535-94854b0a 7b27.jpeg
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File name	e: photo-1468273519	810-d3fe4c125cdb.j	pg		<ul> <li>Custom Files (*</li> </ul>	.jfif;*.pjp;*.jpg;*.p 丶

5. When uploaded, change your Title, Caption, Alt Text (for ADA compliance), and Description as needed. You may also change the size at this point. The click **Insert into Page**. Be mindful of what you use as the Title for your PDF or other documents as this will turn into clickable text on the page.



6. Your image or PDF (example below) will now appear in your post or page.

How to Place Holds During Curbside Services		
flls.fllslibraries.org//How-to-Place-Holds-During-Curbside-Services.pdf	Ø	<b>%</b>

7. You can also change the size of the image by first clicking on the image and then clicking and holding on to the bottom right white squares at the corner of the picture. Drag the square to the lower right to increase size or reverse to decrease size. You can also click on the pencil to edit the properties of the image. Remember to Publish or Update your Post or Page.



# <u>Links</u>

You may want to add a clickable link in a Post or Page that will direct your patrons to a different webpage or a different website altogether.

- 1. In the body of your Post or Page, highlight text that you want to use as a link. You can also click on an image to add a link to it.
- 2. Click on the Insert/edit link button in the toolbar, it looks like a chain link. A field will pop up asking you to Paste URL or type to search. Add the link and click the Apply arrow.



3. If you need additional options, click the gear icon. Add your address or search for a page. You can also check the box next to "Open link in a new tab", which is good for external links. For internal links (within your website), leave that box unchecked. Click **Add Link**. Your text will appear blue and highlighted.

Insert/edit link	×
Enter the destination URL	
URL	
Link Text Hello	
Open link in a new tab	
Or link to existing content	
Search	
No search term specified. Showing recent items.	
Reference	PAGE
About Us	PAGE
Make Your Life Easier with Google Follow-Up	2020/06/08
Privacy Policy	PAGE
Cancel	Add Link

4. Publish or Update your Post or Page.

#### <u>Menus</u>

Menus are used to arrange and create access to your content. Your sites were setup with a Main Menu at the top of the page, a Right Sidebar menu displaying links to the catalog and databases, and a Footer Menu for the bottom of the page.

These menus can be added or subtracted from, deleted, or new menus added to help better organize access to your site.

A note about the Right Sidebar menu, the images used for display were uploaded by FLLS. New images can be created for new menu entries. Images are not required and text links can be added to any menu.

While editing the menu, it may be helpful to click **Manage with Live Preview** to view your changes as you make them!

#### Editing the Main Menu:

- 1. Go to **Appearance**  $\rightarrow$  **Menus**.
- 2. Where it says, "Select a menu to edit:", make sure it says **Main Menu (Primary Menu)**. If not, choose Main Menu and click on **Select**.



3. Under **Pages**, click on **View All**. Check the box next to your page that you will be adding to your menu. Click **Add to Menu**.

Pages 🔺	Menu Name Main Menu	Save Menu
Most Recent View All Search Storytime! VordPress	Menu Structure Drag each item into the order you prefer. Click the reveal additional configuration options.	arrow on the right of the item to
Book sale June 1-15th	Sample Page	Page 🔻
About Welcome	Book sale June 1-15th sub item	Page 🔻
Sample Page	About	Page 🔻
Select All Add to Menu	Blog	Page V

4. The new page will appear under **Menu Structure**. Click and hold on the new item and drag it to order the menu. Dragging to the right will make it a sub item of the entry directly above it. Release. Click on **Save Menu**.

	Save N	lenu
Menu Structure		
Drag each item into the order you prefer. Click the a right of the item to reveal additional configuration of	arrow on t options.	he
Blog	Page	•
Events	Page	•
Member Libraries	Page	•
Contact Us	Page	•
About		Page

#### Changing the Right Sidebar Menu:

- 1. Login to your WordPress website.
- 2. Move your mouse to Appearance and left click on Menus.



3. Next to "Select a menu to edit:," click the down arrow to show all available menus. Click on **Right Sidebar** and then **Select**.

Menus Manage in Customizer					
The License Key for Theme Colormag has not been activated, <u>Click here</u> to activate the license key.					
Edit Menus Manage Locations					
Select a menu to edit: Right Sidebar Select or create a new menu.					
	Right Sidebar				
Pages	Sidebar ame Right Sidebar				

- 4. Look to the left side, you will see a list of items including Pages, Posts, Custom Links, and Categories. Click on **Custom links**.
- 5. Enter the URL for your link. For example, hoopla would be: <u>https://www.hoopladigital.com</u>. Enter text describing your link. Click on **Add to Menu**.



6. The next step would be to add images to the link, *if you choose to*. If you do not add an image, a clickable text link will appear instead. Under **Menu Structure**, you will see your newly created link. Click on the down arrow to expand it.

hoopla	

7. There are two images to add, the Menu image and the Image on hover. If you are adding hoopla, these images are already in your media library. First, click on Set image. This will open a window allowing you to choose the correct image. Click on the image and then on Select. Next, click on Set image on hover. Choose your hover image by clicking on the image

in the window that pops up and then click on **Select**. For image size, click on the down arrow and click on **Original**. Make sure to click on **Hide** for the Title position.

hoopla	Custom I	Link 🔺	
URL			
http://www.hoopladig	;ital.com		
Navigation Label	Title Attribute		_
hoopla			
Menu image	Image on hover		
Set image	Set image on hover		
Image size			
Original Size		•	
Title position			
Hide        Above        I	Below   🔵 Before   🔵 After		
Chose menu image			
Chose menu image Upload Files Media Library All dates	Search	АТТАСН	IMENT DETAILS
Chose menu image Upload Files Media Library All dates	Search	ATTACH Hoopla- June 7, 7 35 kB 304 × 74 Edit Ima Delete F	IMENT DETAILS Banner-304x74.jpg 2016 4 Permanently
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8. One final step to complete this process, click on **Save Menu** to save your new sidebar.

#### Adding & Using a Slider

A slider can be used to highlight blog posts on your homepage. Sliders can be added by installing a Plugin or your theme may have one built in. The Colormag Pro, by ThemeGrill, which was used as the default theme when FLLS created your websites has a built in slider. Most of the other themes by ThemeGrill also have a slider.

If you're installing your own slider Plugin, look for one that is updated frequently and compatible with the most recent version of WordPress. The instructions here are for use with the Colormag Pro slider.

The Colormag Pro slider populates its image from the Featured Image of your Post. It's important when adding a Featured Image to use the recommended image size by the theme. That way your image isn't cropped by the slider in a way that hides information.

The Slider in Colormag Pro has the ability to populate the slider with your most recent blog posts or by specifying a Category, Tag, or by a specific Author. For the example of these instructions, we use a special Category called "HomeSlider" which designates content for the slider.

Colormag Pro has two default sizes for slider images, 800x445 and 1400x600. The smaller of the two sizes works well when you have additional information on the left or right of your homepage. Either size would be fine for a homepage with content below the slider.

- 1. If you'll populate your slider by Category, create a Category to designate content to the slider. Our example is *HomeSlider*.
- 2. Make sure your posts are using a Featured Image.
- 3. To add the slider to your homepage, on the Dashboard, go to Appearance  $\rightarrow$  Customize.
- 4. Click on Widgets and then Front Page: Content Top Section.
- 5. Click on + Add a Widget. In the widget menu, click on TG: Featured Category Slider.

<	Front Page: Content Top	×	TG: Breaking News Widget
Conte	ent Top Section	news ticker way. Suitable for the Right/Left Sidebar	
	X Add a Widget	M	TG: Featured Category Slider

- 6. You will be presented with options.
  - For Number of posts to display, choose a number between 3-5
  - Choose to show the latest posts or to show posts from a category that you have already added to your posts, ex. *HomeSlider*
  - For Image Size, choose medium (800x445 pixels)



7. Click on Save.

## **Resources**

- WordPress—<u>codex.wordpress.org/Main\_Page</u>
- Graphics Editors
  - IrfanView—Resize, crop, rotate, flip, convert, red eye reduction, limited effects, batch convert & rename: <u>irfanview.com</u>
  - GIMP (GNU Image Manipulation Program) Free alternative to Photoshop, full graphics editor: <u>gimp.org</u>
- Canva—For creating marketing materials: <u>https://www.canva.com/</u>
- Fonts—Google web fonts: <u>https://fonts.google.com/</u>
- Images—<u>https://www.flls.org/brochures/#freeimages</u>

# **Questions? Comments? Contact:**

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