Quick WordPress Instructions

Why WordPress as CMS (content management system)?
- Platform free, open-source, wide community. Nothing to buy.
- Most popular CMS that is easy to use. Nothing to code.
- Multiple users at different levels of security, all over the web. More people to add material.
- Can use free hosting on wordpress.com, but many colleges/universities offer free hosting for faculty and students. Good for students' resumes.

10 things to know to get started using WordPress.

1. Dashboard
This is where you control the look, create and edit pages, upload and embed media, add users, etc. If your URL is http://www.mysite.edu, then the dashboard can be accessed by http://www.mysite.edu/wp-admin. This will take you to a log-on screen.

2. Posts vs. Pages.
Pages are static, for content that does not change or is not timely. These can be organized hierarchically, with subpages (that can then be set-up to be sub-menus).
Pages are dynamic, the main source for web content. They are organized by **categories**, which provides the structure for the website; categories can be menu items, and they can be organized hierarchically (with sub-categories).
When you first add a new post or page, you will see two tabs that give you a choice for how to edit the post or page: visual or text. Visual is WYSWYG, and can be used in combination with the buttons above the box for formatting. Text displays the HTML code. If you are familiar with HTML, you can use "text"; otherwise, the visual approach works the same way.

3. Users
People can be given different levels of control to the website. The levels, from minimum to maximum 'power,' are:
- Subscriber: (usually not used).
- Contributor: Can write and manage their own posts, but cannot publish them. Cannot touch pages.
- Author: Can publish and manage their own posts or add media. Cannot touch pages.
- Editor: Can write and edit all posts or add media. Cannot touch pages.
- Administrator: Can do it all.

4. Themes (under appearance)
Templates designed for different types of purposes (portfolio, organizational, commerce, etc.). There are both free and paid templates. **Avoid editing code on template unless you are familiar with css and php** (i.e., don't use the editor, under appearance). For this class, you actually cannot do much with editing of themes because we are using a WordPress Multi-site.

5. Menus
Themes are designed to add one or two menus in specific places; locations cannot be changed. Menu items can be created from pages, categories, links, or individual posts. Items can be nested hierarchically using drag-and-drop on the edit menu screen. Best practice is to use pages and categories, with occasional links, to structure your website.

6. Widgets
These are pre-programmed features that provide a particular function. They add functionality to general pages (i.e., a sidebar on the right that displays RSS feeds), but are mostly geared toward the homepage. Templates are programmed to place widgets in particular areas (and template selection is largely based on this type of placement). Widgets can be added by adding plug-ins to your WordPress site.

7. Plug-ins
These are tools that can be added to generic WordPress configurations, and are usually free. They do optional tasks like embedding or linking to social media sites, create sliders or tabbed content widgets, and other functions. They may add menu items to your Dashboard, and are used either as widgets or shortcodes. Instructions for use of plug-ins are provided by the writer of the plug-in. They can be installed and deleted, activated and de-activated, often requiring updating (notification through Dashboard). For this class, you cannot add plug-ins because we are using WordPress Multi-site; Fuji will need to install them for you. If you want a plug-in, email Fuji (erlozada@davidson.edu).

8. Media
WordPress maintains a Media Library of uploaded files; these can be pictures, Word documents, pdf's, etc. You can the insert the media into posts or pages, and WordPress recognizes that files will not display and turn them into links. For images, you can set different sizes (WordPress automatically lets you choose fixed sizes, from thumbnails to full size images). Video can be embedded by first uploading the video to a service like YouTube; that URL can then be placed in a post or page (while viewing the editing box as "text" and not "visual"), and WP will automatically embed the video.

9. Header (under Appearance)
Some WP templates establish a particular size for graphics to be used in headers; you can see this in "custom header." By default, WordPress uses your site title and tagline in your header (which you can see in customize, in the appearance section).

10. Some suggestions:
   ● You can turn off commenting, so your webpages look more like a 'website' instead of a blog. This can be done in settings->discussion.
   ● Akismet is a great (and default) plugin to minimize spam in your comments section (if you have comments turned on). I will turn it on by default for all websites.
   ● Use category pages on your menus to provide collections of similar posts. You can also create collections written by the same author. These show up as www.mywebsite.edu/category/(name of category) or www.mywebsite.edu/author/(author userid). The links to these categories/authors can also be made into menu items. You can also use tags for similar collections.
   ● Use "featured images" to make your category pages look better. Featured images are not shown in the post or page, only in the collection.
   ● Permalinks (under settings) can be tweaked to make your URL's make more sense.
   ● Always click save when editing posts or pages (or menus, etc.). You can also pre-publish posts or pages by tweaking the publication date (which if a future time is used, can be used to automatically have posts/pages appear on your website at different times.