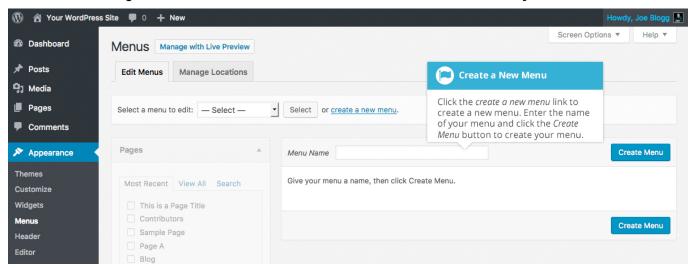
site header, other times you may even have menus located in the sidebar or footer of your site.

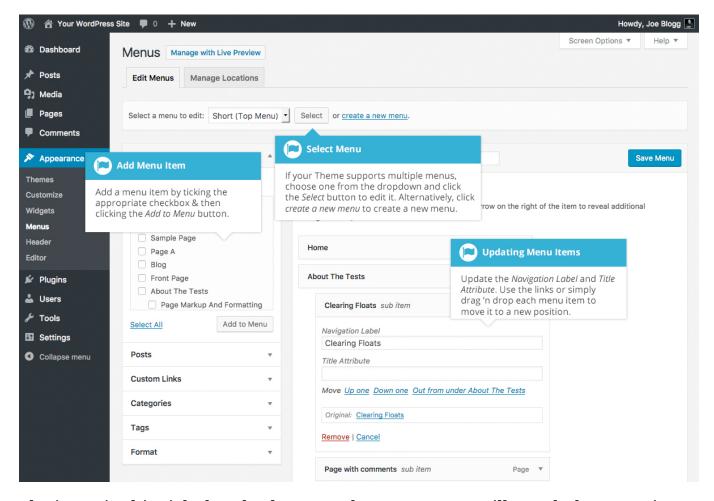
To add a new menu, hover your cursor over the *Appearance* menu option in the left-hand navigation menu and in the fly-out menu, click the *Menus* link. Alternatively, click the *Appearance* menu option and then click the *Menus* link underneath.

On the screen that's displayed, click the *create a new menu* link. You'll be presented with a screen similar to below. Enter a name for your new menu in the *Menu Name* input field. Click the *Create Menu* button to create your new menu.



#### Editing an Existing Menu Item

Your current list of menu items resides in the right-hand column on the menu screen. If there are multiple menus on your site, there will be a dropdown list displayed at the top of the page that enables you to select the menu that you would like to edit. Simply select the menu you would like to edit from the *Select a menu to edit* dropdown list and then click the *Select* button. The menu items for your selected menu will then be displayed.



The items in this right-hand column on the *Menus* page will match the menu items that appear on your website. Clicking on the down arrow next to each menu item name will show an options panel for that particular menu item. In this options panel, there are several items that can be updated. You can show or hide extra fields such as *Link Target*, *CSS Classes*, *Link Relationship (XFN)* or *Description* using the *Screen Options* tab at the very top-right of the screen.

- **URL** Only displayed for Custom Links and will contain the URL to navigate to when that menu item is clicked
- Navigation Label This is the label that will display within the actual menu on your website
- Title Attribute This is the tooltip that appears when the mouse cursor hovers over the menu item
- **Open link in a new window/tab** (Hidden by default) You can set the menu item to open in the same window or tab (which is the default) or in a new

window or tab. This option is made visible by ticking the *Link Target* option on the *Screen Options* panel

- **CSS Classes** (Hidden by default) Optional CSS Classes to add to this menu item. This option is made visible by ticking the *CSS Classes* option on the *Screen Options* panel
- Link Relationship (XFN) (Hidden by default) Allows for the generation of XFN attributes so you can show how you are related to the authors/owners of site to which you are linking. This option is made visible by ticking the *Link Relationship (XFN)* option on the *Screen Options* panel
- **Description** (Hidden by default) The description for the link. This may or may not appear, depending on the theme This option is made visible by ticking the *Description* option on the *Screen Options* panel

Each menu item can be moved to a new location in the menu hierarchy by using either the links underneath the *Title Attribute* input field or by clicking on the title area of the menu item and dragging 'n dropping the menu to new location. If you choose to drag 'n drop your menu items, the cursor will turn into a four-pointed arrow when you're hovering over the correct area.

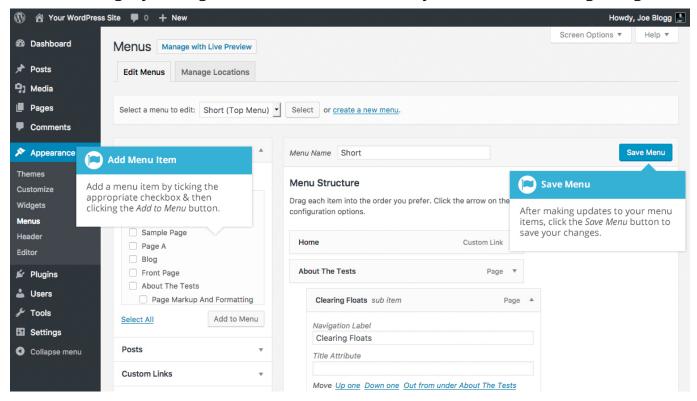
After making updates to your menu items, click the *Save Menu* button at the top or bottom of the screen.

#### Adding a New Menu Item

By default, only the Pages, Custom Links and Categories panels are shown. If you'd like to add Posts, Tags or Post Formats as menu items, you simply use the *Screen Options* tab at the top-right of the screen to enable these panels as well.

To add a new Page as a menu item, tick the checkboxes in the *Pages* panel, next to each of the Pages that you'd like to add. You can select one Page at a time or multiple. After selecting your Pages, click the *Add to Menu* button. The new menu items will append to the bottom of the current list of menu items. The menu item name will default to the Page name. To change this, simply click on the down arrow next to the menu item name to view the options panel and then update the *Navigation Label* to your preferred name. After making your updates, click the

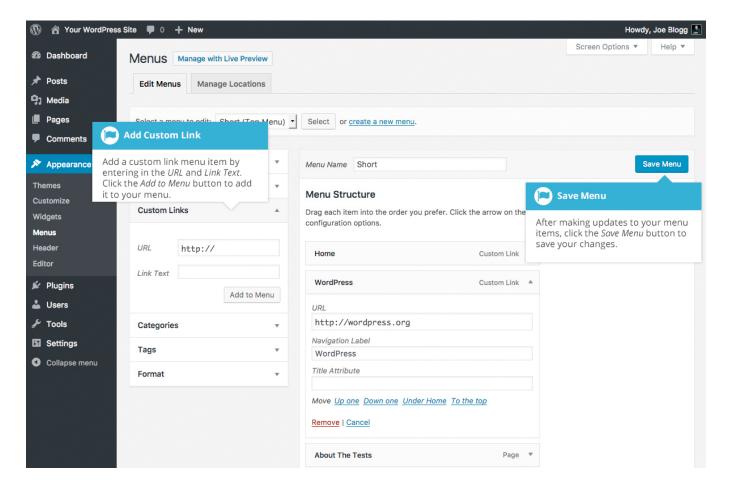
Save Menu button at the top or bottom of the screen. The steps to add a Post, Post Format, Category or Tag as a menu item are exactly the same as adding a Page.



To change the order that the menu options appear in, simply place your cursor over the title area of the menu item you'd like to move. When the cursor changes to a four-pointed arrow, click and drag the menu item to its new location. Depending on how your menu is configured within your theme, it's even possible to create the multi-level hierarchy required for dropdown menus. After moving your menu items around, don't forget to click the *Save Menu* button at the top or bottom of the screen to save your changes.

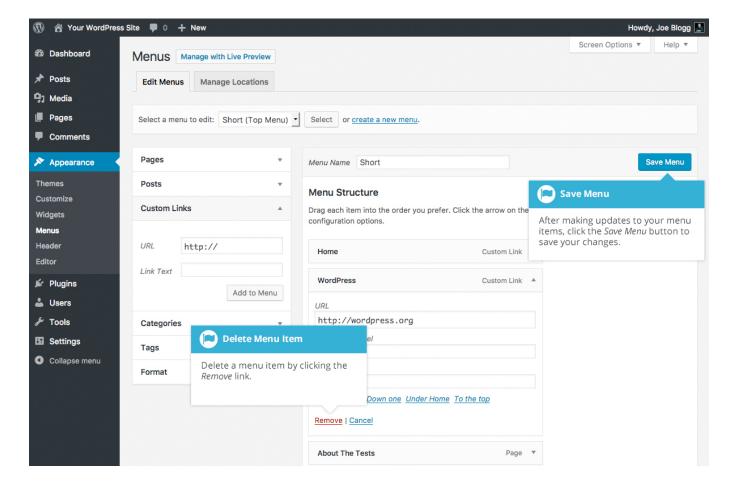
#### Adding a Custom Link Menu Item

Use the *Custom Links* panel to add a custom link to your menu, such as a link to an external website. Simply type in the website URL in the *URL* field and the menu name in the *Link Text* field. Click the *Add to Menu* button when done. Use the same steps outlined previously to adjust the order of the menu item and click the *Save Menu* button at the top or bottom of the screen to save your changes.



#### Deleting a Menu Item

To delete a menu item click on the down arrow next to the menu item name to view the options panel for that item and then click the *Remove* link. After making your updates, click the *Save Menu* button at the top or bottom of the screen.



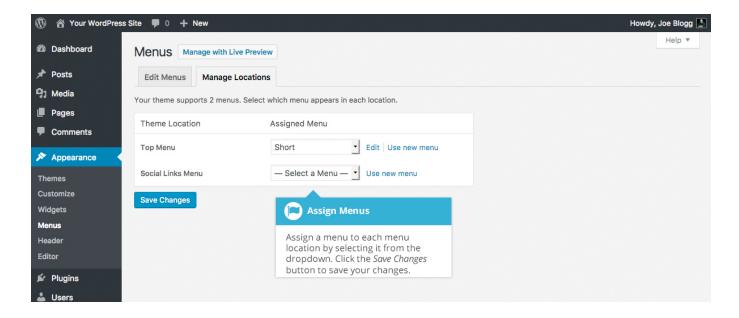
#### **Managing Menu Locations**

After you create a menu, you also need to tell WordPress where to use it. This is where the *Manage Locations* tab on the *Menus* page comes in.

After clicking the *Manage Locations* tab on the *Menus* page, you will be shown a page similar to below, with a list of the various menu locations used in your Theme. You may have one menu location or you may have multiple, depending on the Theme currently in use. Your menu location won't necessarily be called 'Primary Menu' either, as shown below. Again, that will depend entirely on your Theme.

Assign an existing menu that you've created to the appropriate location by selecting it from the dropdown list. Click the *Save Changes* button to save your changes.

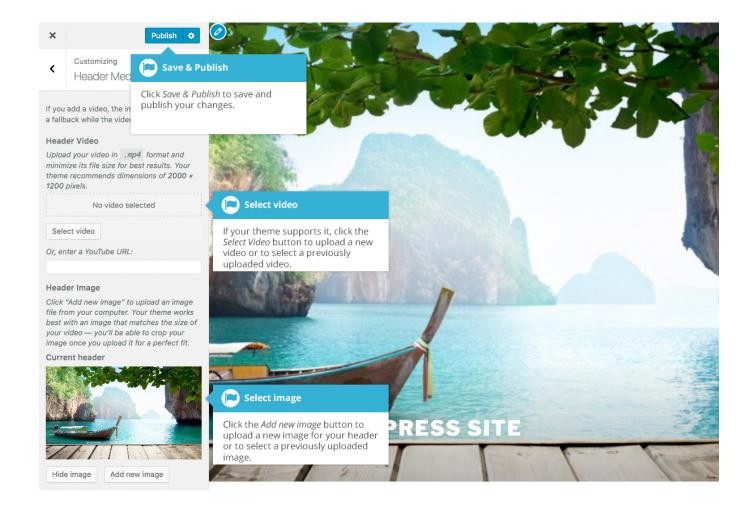
Alternatively, you can choose to create a new menu and automatically assign it to the location by clicking the *Use new menu* link.



#### Header

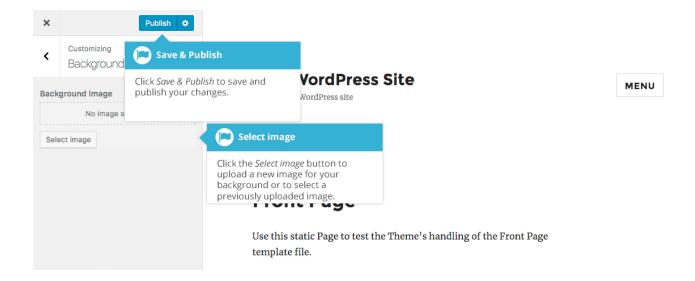
The *Header* menu option will only be available if your current Theme is making use of this option. It allows you to choose an image (or if your theme supports it, a video) to display in the header area of your site. Clicking the *Header* menu option will take you to the *Header Media* panel in the Customizer. In the default Twenty Seventeen theme, the Customizer panel is called *Header Media* as it supports both images and video. In other themes it may be called *Header Image* if the theme doesn't support video headers.

You can select one of your previously uploaded images or you can upload a new image by clicking the *Add new image* button. If you're using the Twenty Seventeen theme, the header also supports video so you can select one of your previously uploaded videos or you can also choose to upload a new video by clicking the *Select Video* button. If you have videos that you've previously uploaded to YouTube, you can also enter a YouTube URL in the appropriate field. To save your changes, click the *Save & Publish* button at the top of the page. Again, depending on the theme you're using you may or may not have this *Header* option.



# Background

The *Background* menu option is another theme specific menu. It allows you to choose a background image for your site. Clicking the *Background* menu option will take you to the *Background Image* panel in the Customizer. You can select one of your previously uploaded images or you can upload a new image by clicking the *Select Image* button. To save your changes, click the *Save & Publish* button at the top of the page. Again, depending on the theme you're currently using you may or may not have this *Background* option.



#### Editor

The Editor menu allows you to edit the individual <u>CSS</u> and <u>PHP</u> files which make up your Theme. Normally once a theme is installed and configured on your site, there's no need to make any changes within here. Extreme care should be taken with this option to avoid making changes to files that will affect how your site is displayed. Incorrectly modifying any files within this section can cause your site to display incorrectly or at worst, not at all. Extra caution must be taken if you intend to make any changes here.



It cannot be stressed enough how dangerous this option is if you know nothing about HTML, CSS or PHP. Modifying your theme files can drastically change how your site displays and depending on what gets changed, can even stop your site from displaying altogether.

# Plugins

Plugins extend and expand the functionality of WordPress. Once a plugin is installed, you may activate it or deactivate it here. There are thousands of plugins available that provide a huge range of functionality. The easiest place to find them is within the official WordPress <u>Plugin Directory</u>. You can search and install new plugins by clicking on the *Add New* button at the top of the page or the *Add New* link in the left-hand navigation menu.

Once a plugin has been added to your site, it needs to be 'turned on'. To do this, click the *Activate* link to activate it. Depending on the plugin, you might also find that there are settings that need to be configured.

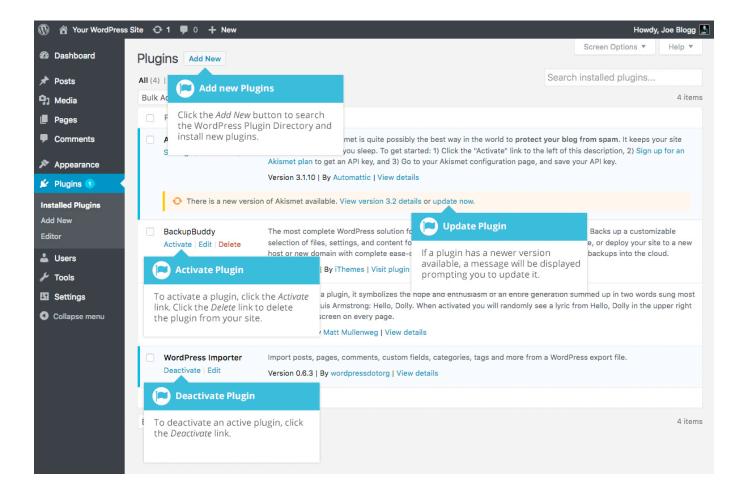
Activated plugins will be displayed with a different coloured background within your list of plugins. They will also be highlighted with a blue vertical bar down the left side of the row.

If any of your installed plugins have available updates, a small number will appear next to the *Plugins* menu option. The number will advise you as to how many plugins have updates available. A message will also be displayed just below the plugin name and description, advising that it has an update, along with a link that allows you to view the details for the new version and another link for updating the plugin.

Prior to updating a plugin, it's wise to verify that the plugin functionality hasn't changed significantly as to adversely affect your site. It's also recommended to check that the plugin and your site still works as expected, once it has been updated.

When you click the *update now* link just below the plugin description, the plugin will automatically update whilst you remain on the *Plugins* page. You will be notified when the plugin has completed updating.

If you have plugins that have been deactivated because you're no longer using them, it's good practice to remove them from your site. You can do this by clicking the *Delete* link underneath the plugin name.

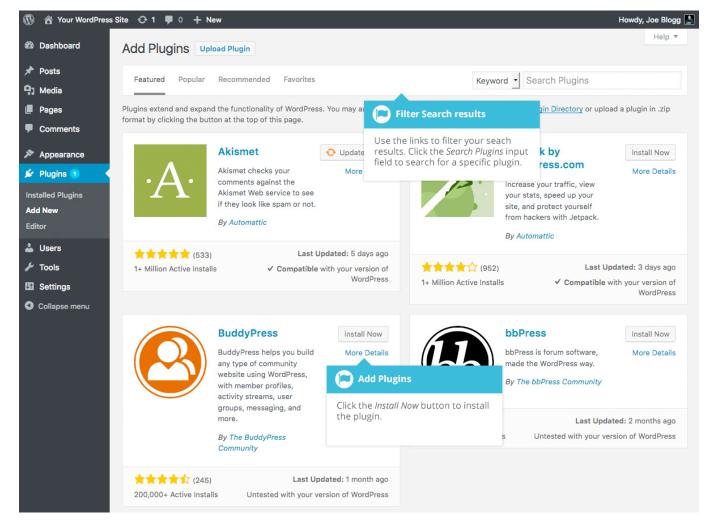


# Adding a New Plugin

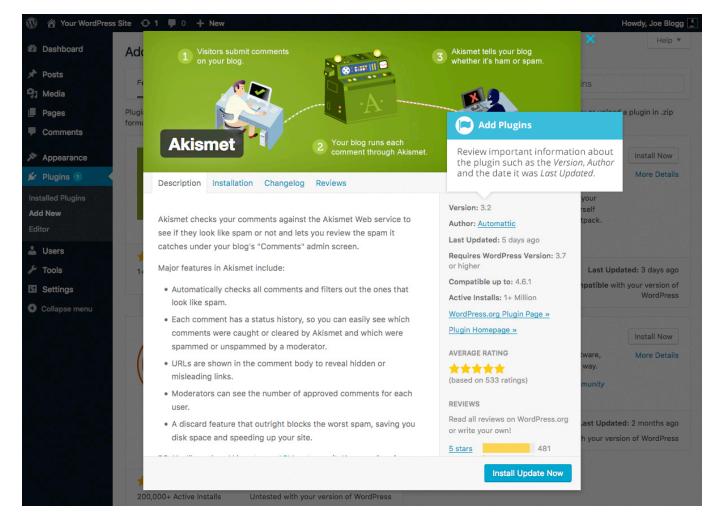
To add a new plugin, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

The *Add Plugins* page will display a list of the current featured plugins from the WordPress.org Plugin Directory. You can use the links at the top of the page to filter the results to see Featured plugins, Popular plugins, Recommended plugins or a list of the plugins that you've marked as 'Favorite' within the WordPress.org Plugin Directory. If you click the *Favorites* link, you'll need to enter in your WordPress.org username and then click the *Get Favorites* button so that it can retrieve your list.

You can also click the *Search Plugins* input field and enter text to search for a specific plugin.

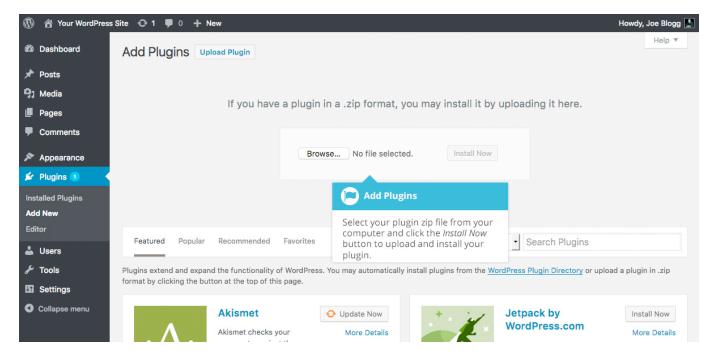


To view more information about a particular plugin, click the thumbnail image, the plugin name or the *More Details* link. A pop-up window will display more information about the plugin such as the plugin *Version*, *Author* and the date it was *Last Updated*. You can also read the full plugin description, installation notes, view screenshots and read any reviews that have been left.



After clicking the *Install Now* button, the plugin will be automatically downloaded to your site and installed. You are then given the option to activate the plugin or return to the plugin installer page.

On the *Add Plugins* page, you also have the option to manually upload a plugin to your site. To upload a plugin, click the *Upload Plugin* button at the top of the page.



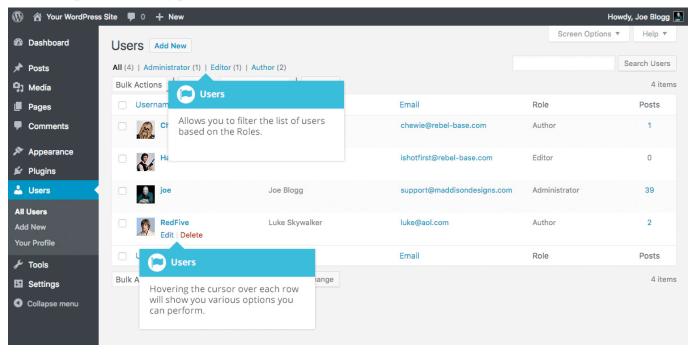
Select your plugin file from your computer by clicking the *Browse...* button. Your plugin file must be uploaded in .zip format.

After clicking the *Install Now* button, your plugin will be automatically uploaded to your site and installed. You are then given the option to activate the plugin or return to the plugins page.

### **Users**

This screen lists all the existing users for your site. Users with roles other than Administrator will see fewer options when they are logged in. Depending on your Role, you can also add new users as well as manage their Roles.

At the top of the screen there are links that allow you to filter the list of Users based on the User Roles. The number in brackets will advise how many there are for that particular type.



When hovering your cursor over each row in the list of Users, links will appear beneath the user name.

- Edit Allows you to edit the user profile
- **Delete** Allows the User to be deleted. This link won't be available for your own profile

A User can have one of five defined roles as set by the site admin: Site Administrator, Editor, Author, Contributor, or Subscriber.

• **Super Admin** – (Only relevant when running multiple sites from one WordPress installation). Someone with access to the blog network administration features controlling the entire network

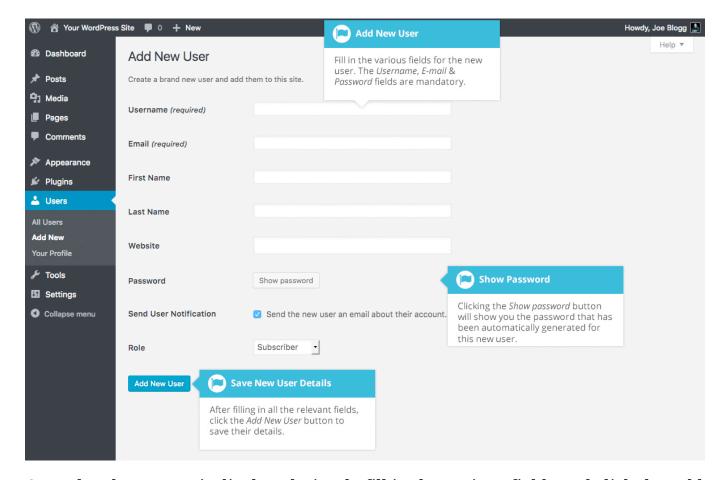
- Administrator Somebody who has access to all the administration features
- **Editor** Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
- Author Somebody who can publish and manage their own posts
- **Contributor** Somebody who can write and manage their posts but not publish them
- **Subscriber** Somebody who can only manage their profile

When WordPress is first installed, an Administrator account with all capabilities is automatically created.

The <u>avatar</u> that is displayed in the list of Users is using what's called a Gravatar. A Gravatar is a Globally Recognized Avatar. Gravatars are currently used by a huge number of blogs, forums, chat sites and the like. Rather than having to upload an avatar on each and every system you sign up to, Gravatars allow you to have one avatar that is viewable everywhere. To create a Gravatar, simply go to <u>gravatar.com</u> and sign up. To use your Gravatar within WordPress, simply add an email address to your Profile that you've configured within the Gravatar site and it will automatically display.

## Adding a New User

To add a new user, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

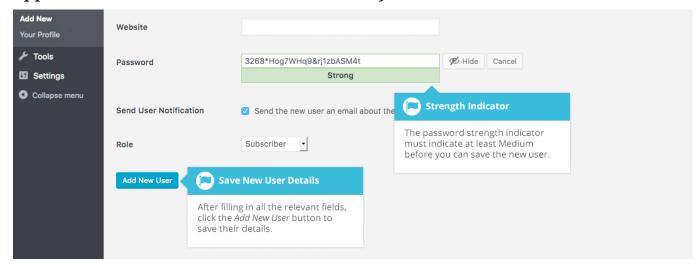


Once the above page is displayed, simply fill in the various fields and click the *Add New User* button.

- **Username** (mandatory) Enter the username of the new user here. This will also be used as the Login name for the user. Once saved, the Username can't be changed
- E-mail (mandatory) Enter a valid email address of the new user here. The email address must be unique for each user. If a published Post or Page is authored by this user and approved comments are made to that post or page, a notification email is sent to this email address
- First Name Enter the first name of the new user here
- Last Name Enter the last name of the new user in this text box
- Website You may enter the new user's website URL in this text box
- **Password** Clicking the *Show password* button will show you the password that has automatically been generated for the new user

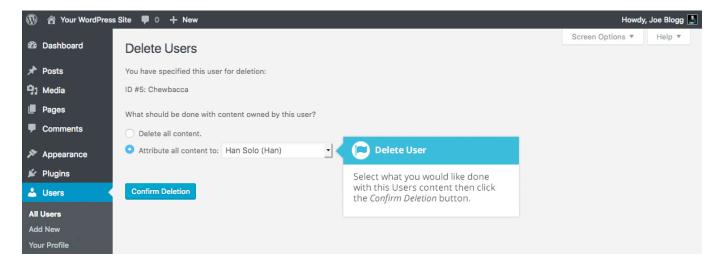
- **Send User Notification** When ticked, WordPress will send your new user an email about their account
- Role Select the desired Role for this user from the dropdown list

WordPress will automatically generate a strong password when you create a new user. Clicking the *Show password* button will display the password that was generated and if you want, will also allow you to change it. The password strength indicator, shown just below the password field, must indicate at least Medium before WordPress will allow you to save the new user. It goes without saying, the stronger the password the more secure the login so it's advisable that the strength indicator shows your password as being Strong. To make a password stronger, use upper and lower case letters, numbers and symbols like! "?\$ % ^ &).



## Deleting a User

To delete a user, click on the *Delete* link that appears beneath the user name when hovering your cursor over each row. The *Delete* link wont appear for the user that is currently logged in.



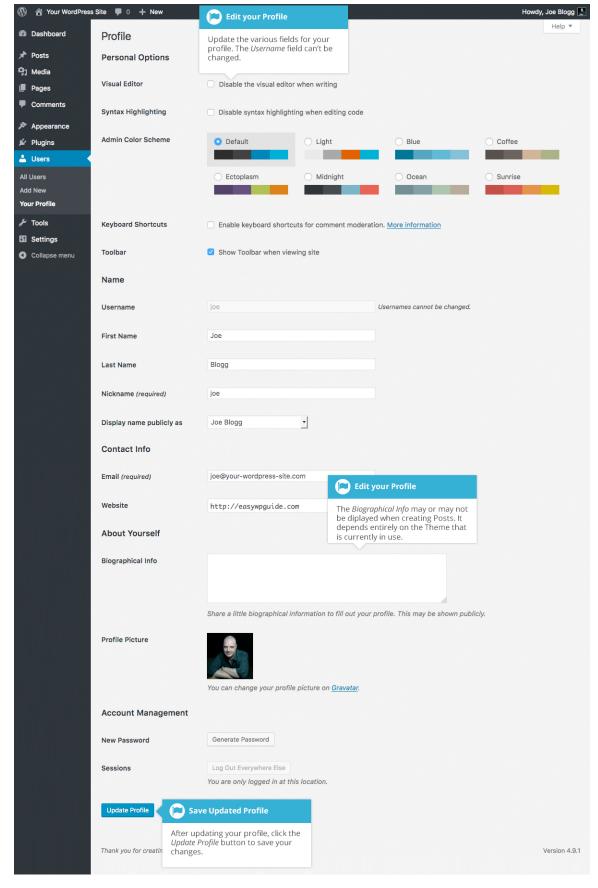
Along with deleting the user you will be given the choice of what to do with all the content currently assigned to that User. The available choices are:

- Delete all content This will delete all the content which this user created
- Attribute all content to This will assign all the content currently linked to this User, to another User of your choosing. Simply select the User from the dropdown list

After making your selection, click the Confirm Deletion button to remove the User.

## **Editing your Profile**

To edit your profile details, simply click on your user name, when viewing the list of Users or click on the *Edit* link that appears beneath your user name when hovering your cursor over each row. Alternatively, click on the *Your Profile* link in the left-hand navigation.



If you're an Administrator and would like to edit someone else's profile, click on their user name when viewing the list of Users or click on the *Edit* link that appears beneath their user name when hovering your cursor over each row.

Update the appropriate fields and then click the *Update Profile* button to save all your changes.

#### Personal Options

- **Visual Editor** Checking this box disables the Visual Editor when writing and uses the plain html editor
- **Syntax Highlighting** Checking this box disables the syntax highlighting when editing code in the built-in editor
- Admin Color Scheme Check this radio button next to the colour scheme desired for the administrative panels. You have the choice of eight different color schemes
- **Keyboard Shortcuts** Checking this box Enables keyboard shortcuts for comment moderation. Keyboard shortcuts are designed to allow you to rapidly navigate and perform actions on comments
- **Toolbar** Checking this box will display the Admin Bar at the very top of your website (only for the person who is currently logged in)

#### Name

- **Username** You cannot edit your Username because it is used as your Username during the login process. Even an Administrator cannot change your Username. Usually, no one else ever needs to see your Username
- First name Enter your first name in this text box
- Last name Enter your last name in this text box
- **Nickname** (mandatory) The nickname is a requirement for every user. It may be the same as your Username or it can be different. If you don't supply a Nickname, then the Username will be placed in this field
- **Display name publicly as** Select how your name is cited on your blog, from the dropdown list. You can choose from several choices: Nickname,

Username, First Name, Last Name, 'First Last', or 'Last First'. If you prefer 'Last First', insert a comma after your last name in the *Last Name* text field and choose the last option from the dropdown list. For security reasons, it's a good idea to keep this different from your Username

#### Contact Info

- E-mail (mandatory) All users are required to list an email address in their respective Profiles. The email address must be unique for each user. Your blog will use this address to notify you of new comments to your posts and for other administrative purposes. Only other registered users of your blog will have access to this email address. It is never sent anywhere
- Website Enter your website address

#### About Yourself

- **Biographical Info** Enter a short description or profile of yourself here. Depending on your theme, this optional information may be displayed when creating new Posts
- **Profile Picture** The avatar that is displayed is called a Gravatar. A Gravatar is a Globally Recognized Avatar. To create a Gravatar, simply go to gravatar.com and sign up. To use your Gravatar within WordPress, simply add an email address to your Profile that you've configured within the Gravatar site and it will automatically display

#### Account Management

- **New Password** Click the *Generate Password* button to generate a new Strong password. A password strength indicator will be shown just below the password field
- **Sessions** If you've left your account logged in at a public computer or you've lost your phone, you can click the *Log Out Everywhere Else* button to log you out of everywhere except for your current browser

# Tools

The *Tools* menu provides some handy administration tools. Most of the time though, they're used when setting up or configuring your WordPress site and so as such, they won't be covered here in great detail.

#### **Available Tools**

The Available Tools menu option gives you access to the Categories and Tags Converter. The Categories and Tags Converter is a tool for converting Categories to Tags or vice versa. Before it can be used it must be installed via the Import menu option.

# **Import**

The *Import* option provides you with various tools for importing content from other blogging systems. You can import content from Blogger, LiveJournal, Moveable Type, TypePad and Tumblr. You can also import content from Blogrolls that use the <u>OPML Format</u>, posts from an RSS feed or content from other WordPress sites. To import content from another WordPress site you first need to install the <u>WordPress Importer</u> plugin. To import content from another type of site other than WordPress, you'll be prompted to install the relevant Importer plugin after selecting the type of site that you'd like to import your content from.

# Export

The *Export* option is used to export your data in XML format, from your WordPress site. The export format is called *WordPress eXtended RSS* or WXR and will contain your posts, pages, comments, custom fields, terms, navigation menus and custom posts. Once you've saved the download file, you can use the *Import* function on another WordPress site to import the content from this site.

# Settings

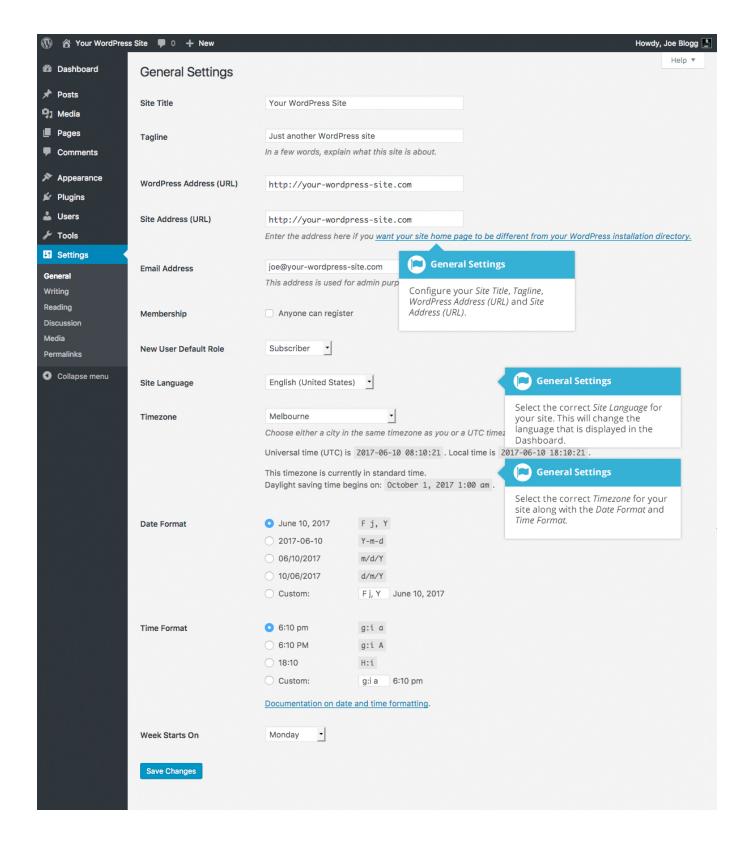
The various *Settings* screens are used to configure your WordPress site. Normally, once your WordPress site is set up there's no reason to change any of these settings. These *Settings* options will only be touched upon very briefly. You can find out lots more information in regards to configuring your site within the WordPress Codex.

#### General

The *General* settings configure your basic site preferences such as the Site Title and Tag Line, the WordPress Address and Site Address, the administrators email address and the date and time format, among other things.

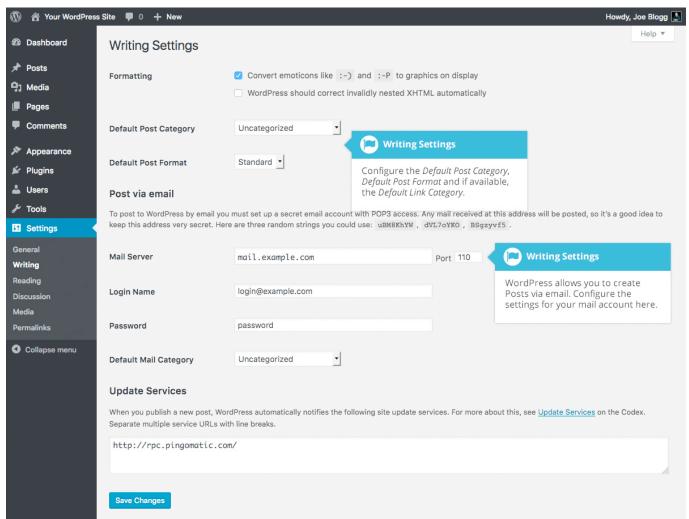
The *WordPress Address (URL)* is the location of your main WordPress core files. The *Site Address (URL)* is the address you want to use for your site homepage. Usually these two URL's are the same but they can be different if, for example, you have your WordPress files stored in a subdirectory.

When you install WordPress, you get the option to select the language that you'd like to use within the Dashboard. After installation, if you'd like to change the language, you can select this using the *Site Language* dropdown at the bottom of the page.



## Writing

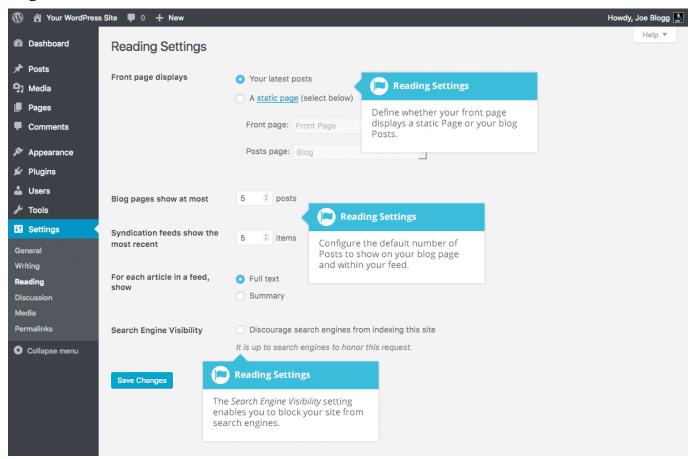
The *Writing* settings configure various options with regards to your site content. Settings include defining the *Default Post Category*, *Default Post Format* (if supported by your Theme) and if the Link Manager plugin is installed, the *Default Link Category*.



## Reading

The *Reading* settings configure how your site is viewed. You can define whether your front page displays a static Page or your blog Posts, how many blog posts are displayed by default as well as Syndication/RSS options. If you configure your site to display a static front page, you can set which page to display and also which page will show your blog posts.

The *Search Engine Visibility* setting enables you to block your site from search engines or allow it to be visible.

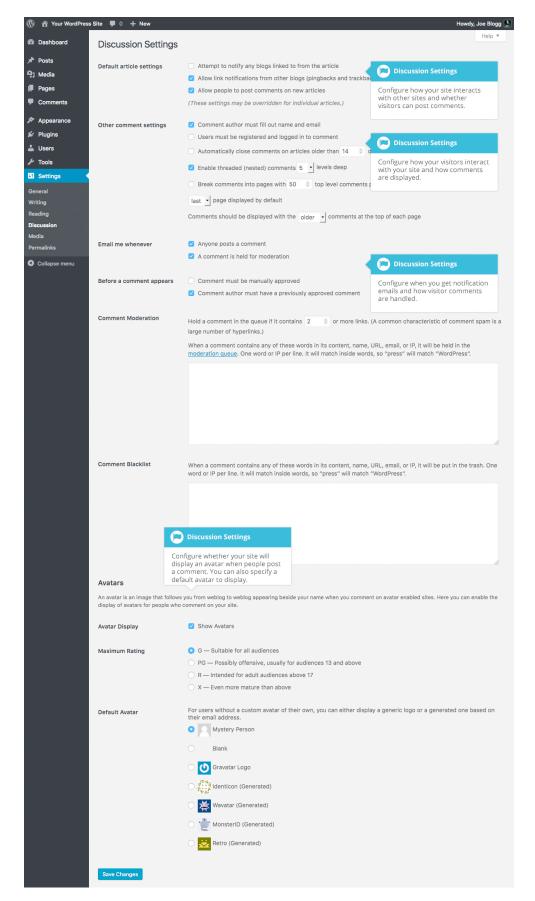


#### Discussion

The *Discussion* settings define how your readers interact with your site and how your site interacts with other blogs. You can configure <u>Pingbacks</u> and <u>Trackbacks</u>, whether readers can post Comments or not and if so, how those Comments are moderated and displayed on your site.

This screen also lets you configure whether the Post Author should be emailed whenever someone posts a comment on your site. If you are receiving emails whenever someone posts a comment, simply uncheck the box next to *Anyone posts a comment* within the *E-mail me whenever* section on this screen and then save your changes.

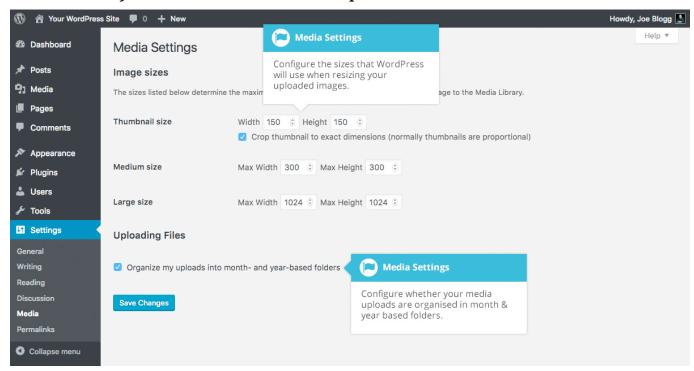
If you would like to be notified whenever a comment is held for moderation, it can be configured on this screen as well within the *E-mail me whenever* section. The email notification is sent to the email address listed on the *Settings > General* page.



#### Media

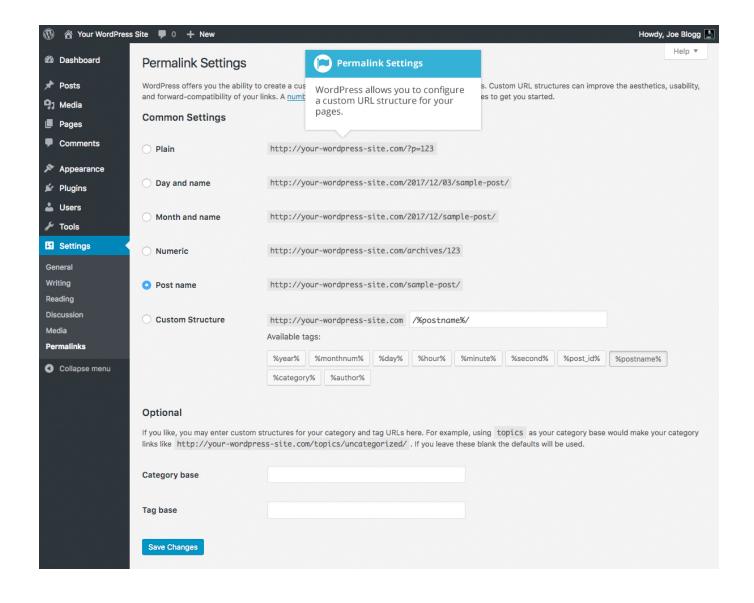
The *Media* settings define the default image sizes that are created when an image is uploaded.

You can also configure whether your uploaded media files are stored in folders based on the year and the month of the upload.



#### **Permalinks**

The *Permalink* settings enable you to configure the URL format that is displayed in the web browser when someone browses your site. WordPress will default your Permalinks to the *Day and name* format however you can change this so that the URL is more user friendly. This also helps considerably with Search Engine Optimisation (SEO). To change the way your site URL is displayed simply select one of the radio button options within the *Common Settings* section on this screen. Next to each option is an example of how the URL would be displayed.



# Keeping your Site Updated

From time to time, themes, plugins & WordPress will require updating. Updates typically happen when developers release security patches or add extra functionality.

It's good practice to keep your themes, plugins & WordPress version updated to the latest versions. The top two reasons for sites being hacked are insecure passwords & outdated (vulnerable) software.

In an effort to promote better security and to streamline the update experience, WordPress will automatically update itself, if it's able to, whenever a minor version is released (e.g. v4.8.2, v4.9.1). These minor releases are usually for maintenance and security purposes or translation file updates. Only core WordPress files will be auto-updated. Your themes or plugins won't be automatically updated.

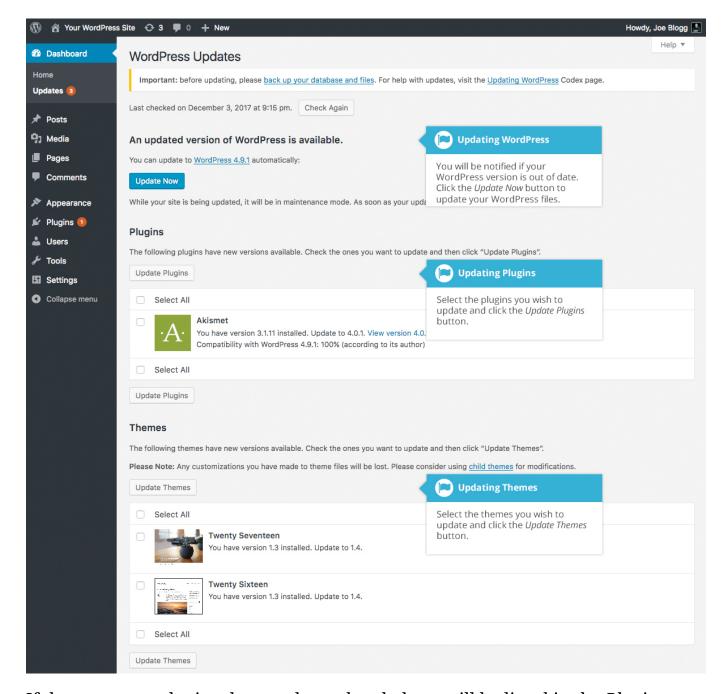
Once your site is auto-updated your site administrator will be notified by email. If your WordPress installation can't update itself automatically for one reason or another, your site administrator will be notified of this as well.

To update your WordPress version manually or to update your themes and plugins, hover your cursor over the *Dashboard* menu option in the left-hand navigation menu and in the fly-out menu, click the *Updates* link. Alternatively, click the *Dashboard* menu option and then click the *Updates* link underneath.

The *Updates* page is divided into three sections. If your version of WordPress requires updating, this will be displayed at the top of the page. Below that, you'll be notified of any plugin updates and below that again, theme updates.

Updating your WordPress version is as simple as clicking the *Update Now* button. WordPress will download the necessary files, perform a validation of those files and then automatically update your site.

Before updating your site, it's always wise to perform a backup first, just in case something unfortunate happens during or after the installation.



If there are any plugins that can be updated, these will be listed in the *Plugins* section on the page. To update your plugins, tick the boxes next to each of the plugins you wish to update and then click the *Update Plugins* button. The new plugin files will be downloaded and automatically installed.

If there are any themes that can be updated, these will be listed in the *Themes* section on the page. To update your themes, tick the boxes next to each of the themes you wish to update and then click the *Update Themes* button. The new theme files will be downloaded and automatically installed.

After your site has been updated, no matter whether it's been done automatically, manually or just themes and plugins, it's a good idea to give your site a quick test to make sure it's functioning as expected. This will ensure that the new themes, plugins or even WordPress itself hasn't introduced new functionality that adversely affects your site or changes how your site operates.

## Where To From Here?

If you're looking for more resources to further your WordPress knowledge the first place to check out is the <u>WordPress.org</u> website. There you'll find technical support and new resources like plugins which are a fantastic way to add extra functionality to your site without having to modify your theme files. The <u>Plugin Directory</u> has over 53,000 different plugins that are available to download, for free. Furthermore, if you want to change how your site looks, have a look in the WordPress <u>Themes Directory</u> which is also there on the WordPress site.

If you find you need more information on a particular topic, have a search through the WordPress Codex which goes into greater detail about how WordPress works. Not only will you find information about updating your site content but there is all sorts of other useful information that will help you with installing WordPress, troubleshooting, using plugins & themes and also theme development, for the more technically minded.

Once your website is humming along nicely, you might want to think about getting involved in the awesome WordPress community. One of the easiest ways to get involved is simply by helping others within the WordPress Support Forums. There is always someone there who's newer to the learning curve than you, and learning is so much improved while you're teaching others! There are topics there for all ability levels, from installation issues, theme and template issues, and general troubleshooting all the way through to more advanced areas of theme and plugin development.

It's a great benefit not just for yourself, but for others as well in getting more involved in the WordPress community. This could be through core commits, UI design, testing beta releases or even just helping people on the WordPress forums. Or, how about getting along to Meetups where users and developers alike get together and learn from and teach each other, show off the projects they're working on and meet others to collaborate with. The more we work together to make WordPress great, the more robust the platform becomes. Everyone wins!

Last but not least, don't forget to keep in touch with us on the web; <a href="http://easywpguide.com">http://easywpguide.com</a>