

Montere

Your WordPress Guide

* Use 'Show Document Outline' in View menu to enable Heading navigation

1. Introduction

1.1. Your Website

We have designed and built your website to be editable using a **Content Management System** (CMS) called **WordPress** so that it is easy to produce great content quickly and easily.

We believe that you should remain in control of your website and that it should be easy to maintain, which is why we recommend using WordPress. WordPress is designed and built for this purpose and has had many thousands of developers contribute to it over many years.

This guide will provide you with step-by-step instructions on how to manage your website, add to the content and fully utilise the flexible functionality we have provided.

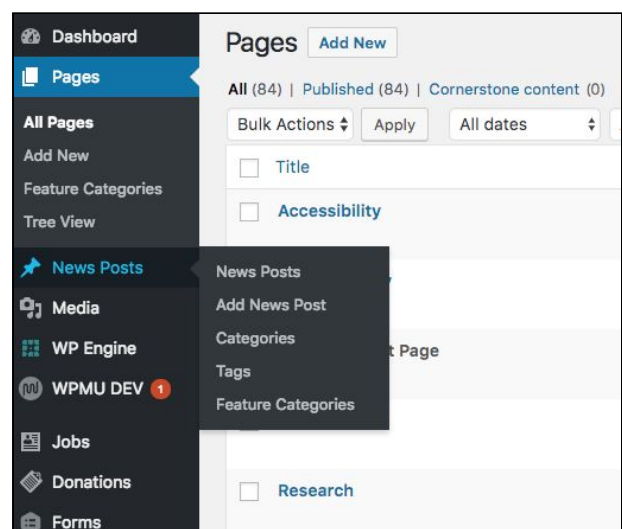
Your website is ready to be used, edited and added to. Familiarise yourself with its basic structure by navigating around the menus, links and pages, and notice their similarities and differences;

- The Homepage
- Content Pages and Posts
- News Listings Page
- Events Listings Page
- Jobs Listings Page
- Header and Footer

1.2. Using WordPress

Log into the Monterey Wordpress [Dashboard](#), and begin to familiarise yourself with the WordPress layout.

The left-side panel allows you to navigate through each section and the options of WordPress, quickly and easily. Hover over the option to see the sub-options and then click to open. The options available in the menu will depend upon your level of access



and your user permissions which will be covered in the [user section](#).

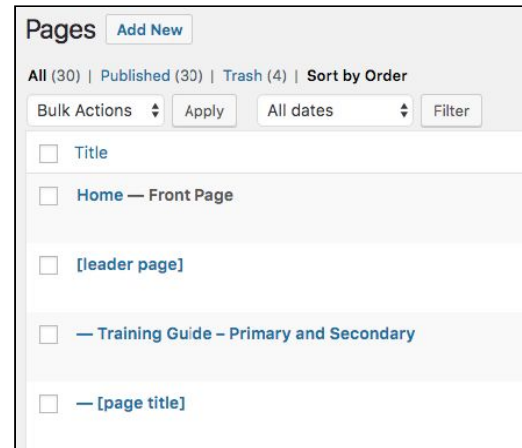
The main section, to the right of the menu, is where you edit pages, make forms or create posts and events.

2. Pages

2.1. All Pages

On your website, **Pages** make up the core content of your site. An example of a page would be your 'Home' page or 'About Us' page. In the WordPress Dashboard, clicking the Pages option, in the left side menu, opens the '**All Pages**' list, showing the hierarchy of all pages in your site.

Selecting a page here will allow you to edit that page's [content](#). You can create new pages or open existing pages to edit.



2.2. Your Frontpage

Your Homepage is for displaying large banner images and text about your organisation as well as the most recent news and events coming up. The Homepage [Content](#) is created like on any other page, and is set as the 'Frontpage' by a setting in the site's Settings.

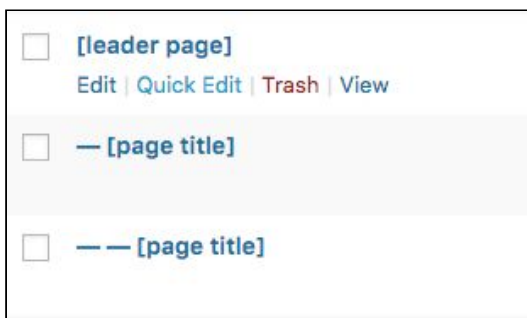
2.3. Adding & Editing Pages

You can create a new page by clicking the '**Add New**' button at the top the screen. When adding or editing a page, the centre panel shows editable page [content](#). The right panel shows **Page Attributes**, for setting the Page within the [Site Hierarchy](#).

3. Page and Site Hierarchy

3.1. Your Site Structure

On navigating your **website**, and by looking through the All Pages list in the



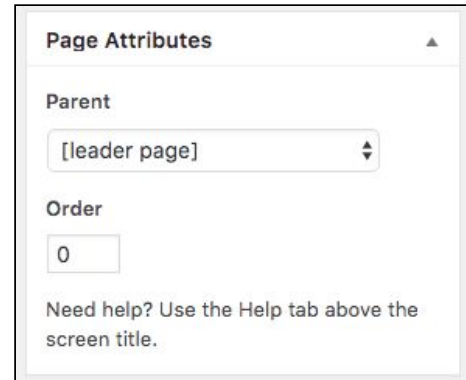
Dashboard, you'll find the core pages of your site have been created and ordered, as in your Information Architecture document, to form the **Site Hierarchy**. The page's **Page Attributes** panel determines its **Parent** page and in which **Order** the page appears in the hierarchy. It's also good to note that the Page Order doesn't alter the Menus in the [Header](#), at the top of the page

3.2. Parent and Child Pages

In the below example, [leader page] is a **Parent** page. Pages below, prefixed with a '-', are **Child** pages. Pages with more than one '-' are down another level, and so on. To set a parent page.

To set a parent page:

1. In the All Pages list, add a new page or open an existing page to edit
2. In the page's **Page Attributes** panel, select a suitable parent page from the **Parent** dropdown menu
3. Click **Update** to save that page as the parent page of the page you're *editing*



3.3. Page Order - Order Field

By default, newly added pages are ordered alphabetically in the All Pages list, so to reorder a page in the **Site Hierarchy**:

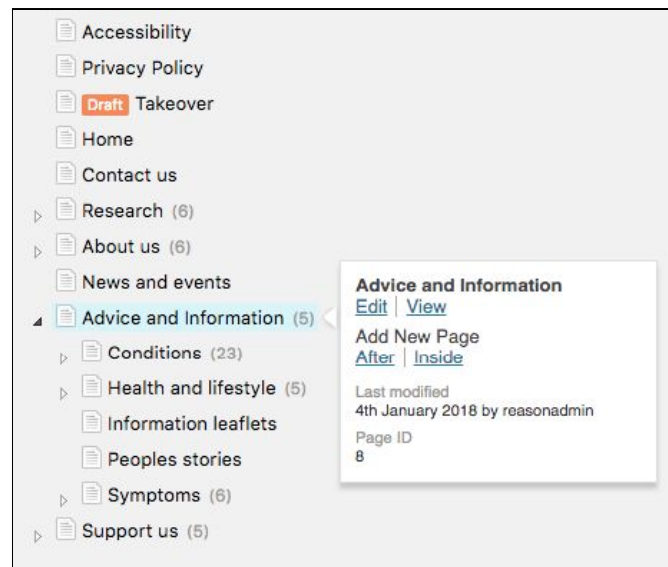
1. In the All Pages list, add a new page or open an existing page, to edit
2. In the page's **Page Attributes** panel, enter a number in to the **Order** field - 1 for first, 2 for second etc
3. Click **Update** to save the page order in the site hierarchy

3.4. Page Order - Page Tree

An *easy* way to edit **Parent** and **Child** pages and page **Order** is to use the Pages '**Tree View**' plugin in Pages, in the Dashboard. Parent pages can be expanded to show their child pages, and you can 'drag and drop' parent and child pages to reorder them in the site hierarchy.

Ordering top level **Parent** pages means you can organise the 'All Pages' list in the same way as defined by your site's Navigation menu. For example; the Home page first, the News Posts page second, and then, other pages. Ordering

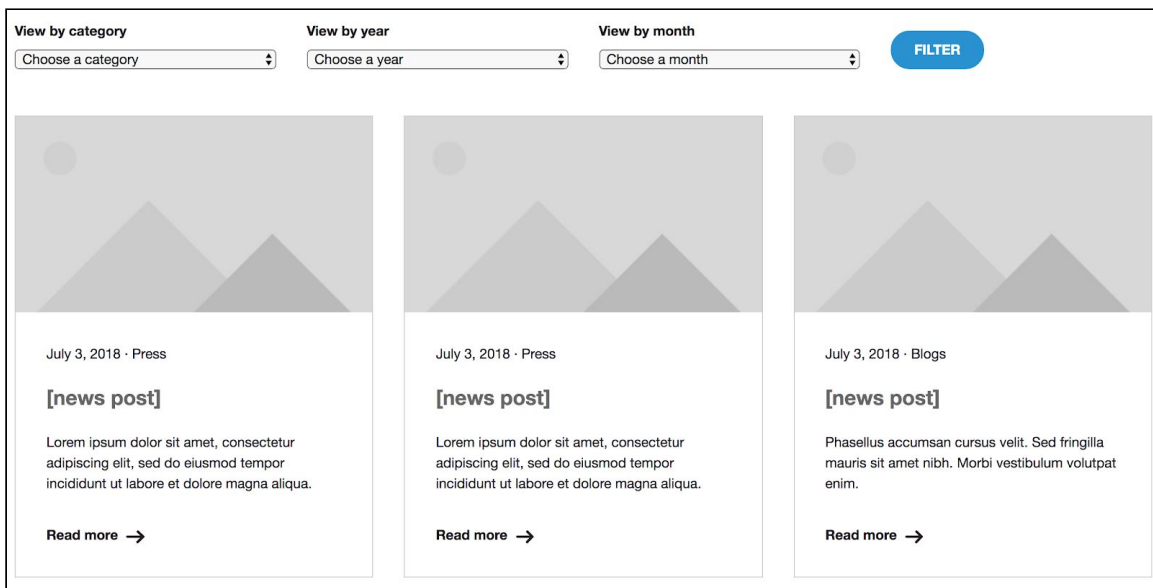
Child pages underneath, organises them that order on the actual site too. Any unordered pages appear above, ordered alphabetically.



4. News Posts

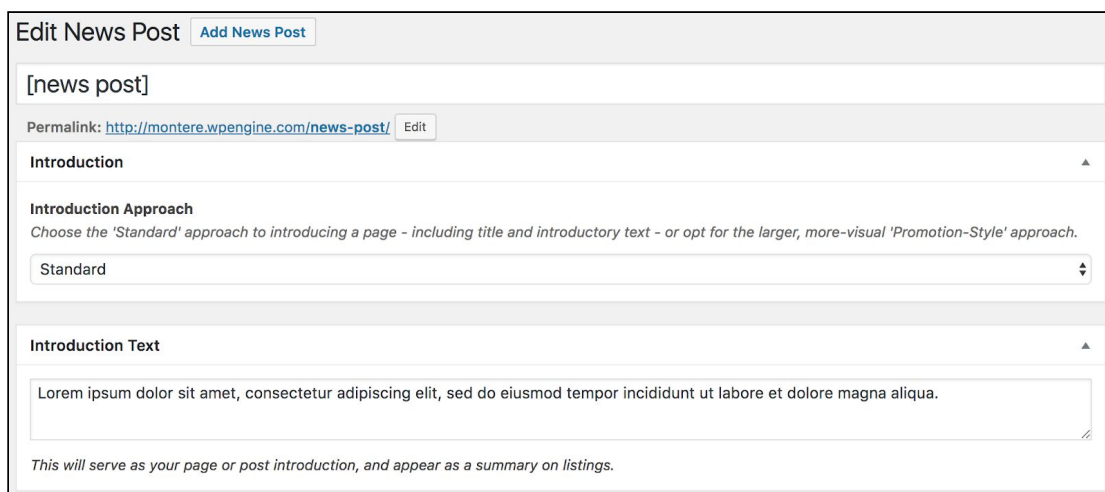
4.1. News Listings

News Posts are *listed* on the **'News List'** page. You'll find a link to it in the site's top menu. They are ordered by most recent first and can be **filtered** by *Category*, and the *Year* and *Month* they were **published**.



4.2. Adding & Editing News Posts

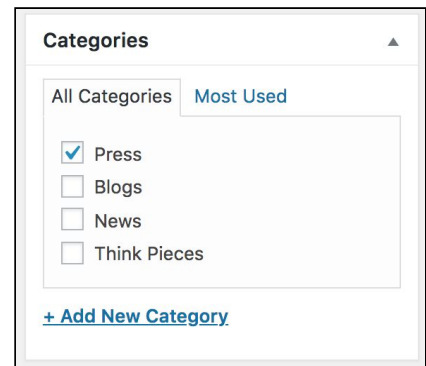
In the WordPress Dashboard, clicking News Posts, in the left side menu, opens the list of **News Posts**. You can create a new News Post by clicking the **'Add New'** button at the top. Creating or editing a News Post shows the **Introduction** approach and **Main Content** areas to edit, just in the same way with **Pages**.



4.3. News Categories

Assigning **Categories** to News Posts means they can be filtered by category in the News Listings page. Categories can be created and assigned by:

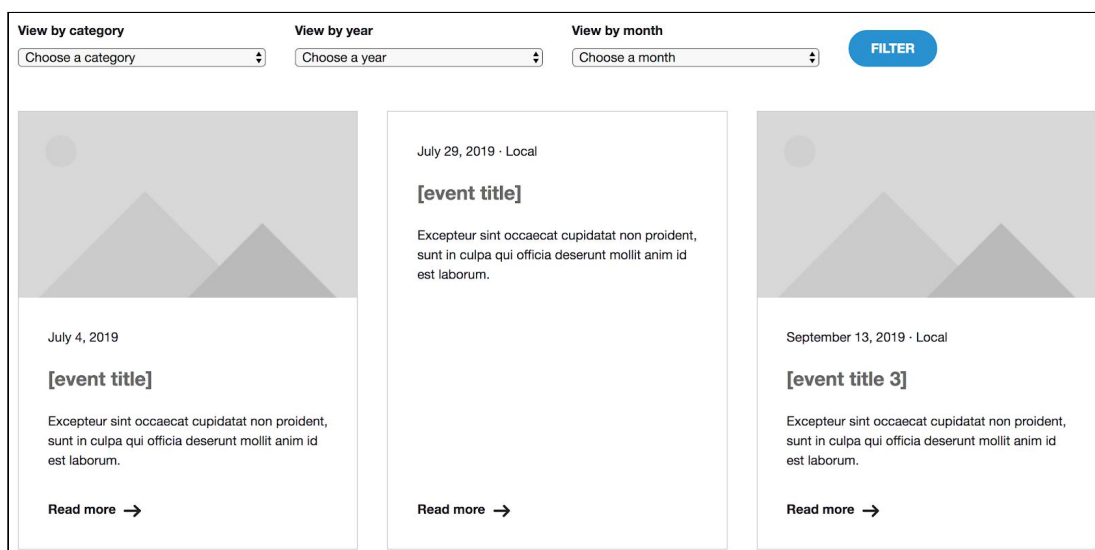
1. Adding a News Post, or opening an existing News Post, to edit
2. In the right panel, select one or more **Categories** from the Categories list
3. To add and select a *new* category, click **Add New Category**, type the **Name** of your new category, and click **'Add New Category'**



5. Events

5.1. Events Listings

Events are *listed* on the **'Events'** page. They are similar to News Posts with the *additional* details of the Event **Date**, **Time** and **location** and are *ordered* by the Date of the Event. Events which *Dates'* have passed, no longer appear on the Events page.



5.2. Adding and Editing Events

In the WordPress dashboard, click **Events** in the left side menu to show the list of all events. You can create a new event by clicking the **'Add New'** button at the top. Creating or editing an Event shows the **Introduction** approach, **Events** details, and **Main Content** areas in the centre, with Event **Categories** and settings on the right panel.

Events	
Start Date *	July 29, 2019
Start Time	
End Date	
End Time	
Location Name	Manchester
Location Postcode	

5.3. Events Details

In order for an event to be *created*, the **Start Date**, in the Events details, has to be populated. You can choose to fill in the following other fields, suitable for the event; Start Time, End Date, End Time, Location Name, Location Postcode.

5.4. Events Categories

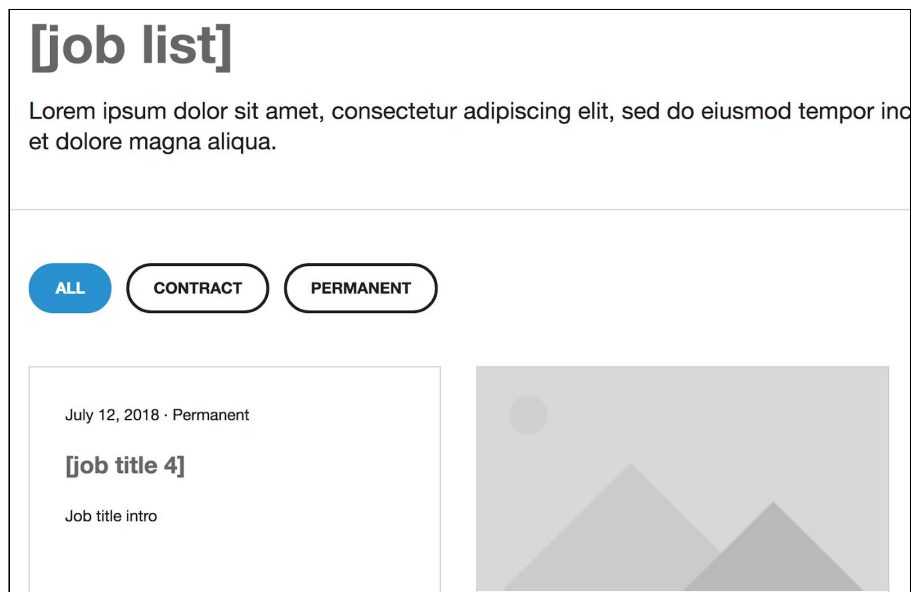
Events **Categories** can be selected or added by:

1. In Events, add an Event or open an existing Event, to edit
2. In the right side, **select** one or more **Categories** from the Categories list
3. To **add** and select a *new* category, click **Add New Category**, type the **Name** of your new category, and click '**Add New Category**'

6. Jobs

6.1. Jobs Listings

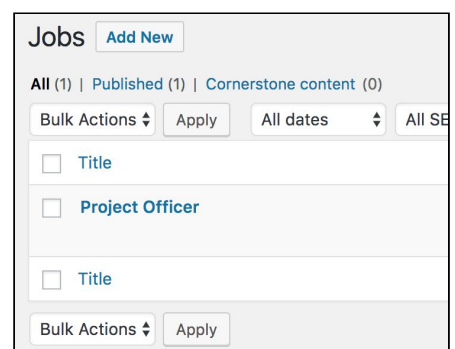
Jobs are *listed* on the Jobs page. They are similar to News Posts with the *additional* details of the Job **Location**, **Salary**, **Hours of Work**, **Contract** and **Closing Date**, and are *ordered* by their Published date. Jobs which have passed their *Closing Date* no longer appear on the Jobs page.



6.2. Adding & Editing Jobs

Jobs work similarly Pages and Posts, made up of the same [content](#) types. Clicking the Jobs option, in the left side menu, opens the 'Jobs' list, where you can view all Jobs, and create new Jobs, and edit existing ones.

Click the '**Add News Job**' button at the top the screen to create a new one. On editing a Job, the centre panel



shows the editable post [content](#), and the Job's editable specific fields, *Contract* type, *Salary*, *Hours of work*, *Closing date* and *Location*. The right panel shows Job **Categories**, which can be selected, as then filtered by on the Jobs List page.

6.3. Job Categories

Job **Categories** can be selected or added by:

4. In Jobs, add an Job or open an existing Job, to edit
5. In the right side, **select** one or more **Categories** from the Categories list
6. To **add** and select a *new* category, click **Add New Category**, type the **Name** of your new category, and click '**Add New Category**'

7. Content

Pages and Posts are divided into *three Sections*;

1. **Title**
2. **Introduction**
3. **Grouped Layout**

This part of the guide goes over **Titles**, **Introductions**, **Group Layouts**, and their Content **Blocks**, that make up the core content for the **pages**, **news**, **events** and **jobs**, of your site.

7.1. Title

A **Title** is required, which does two things; it forms part of the *web address* (URL) for your post, and it displays at the *top* of the post when viewing it.

7.2. Introduction

The **Introduction** contains featured text, or an image The **Introduction** Section contains two blocks:

1. **Introduction Text** - what displays at the top of the post and features in Highlighted Content, or, listing pages such as News or Events.
2. **Introduction Approach** - chooses between:
 - Standard - showing just the Introduction text
 - Promotion - the introduction text AND a chosen image across the page or post

7.3. Grouped Layout

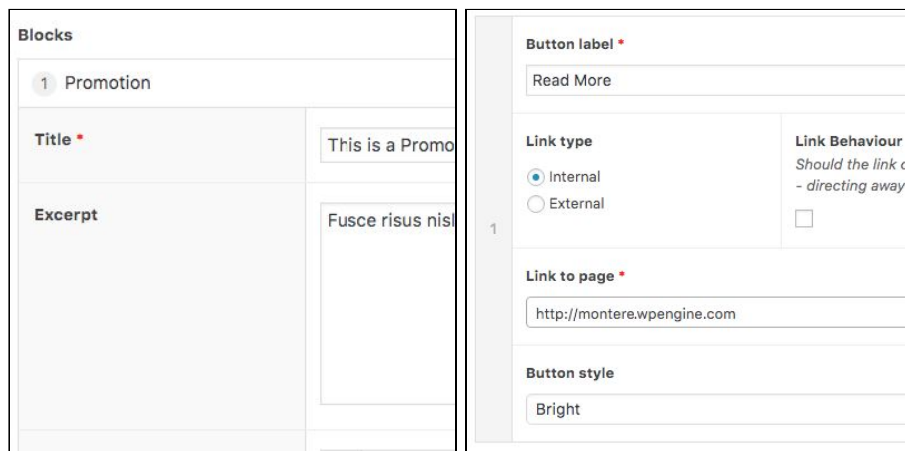
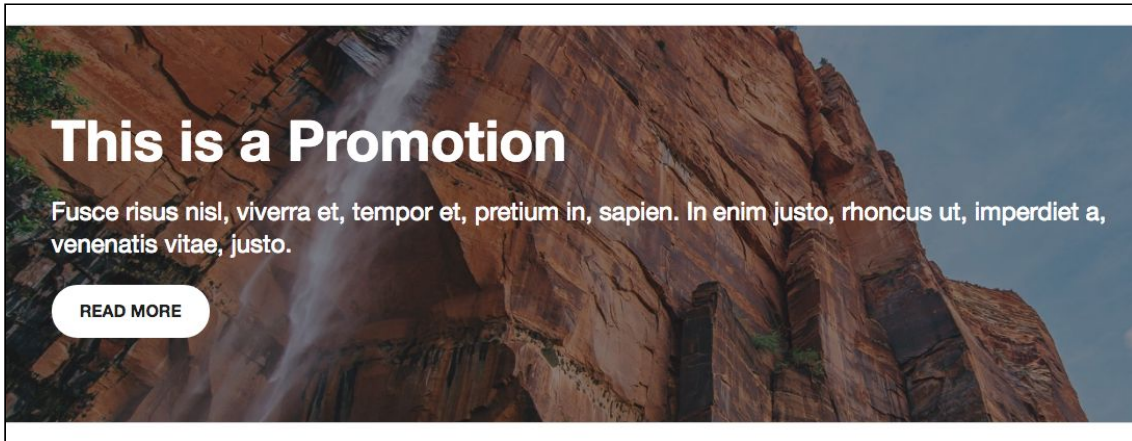
The **Grouped Layout** is where you add different **Content Blocks** best suited to your page or post, including *pages*, *news*, *events* and *jobs* posts. The following explains how to use the content blocks available.

It's best *not* to use every content block available on a page or post. It's best to firstly have your content ready and think which content blocks most suit that content. Remember to click 'Update' on the post, in order to [Save and Publish](#) your changes.

Promote

Promotion

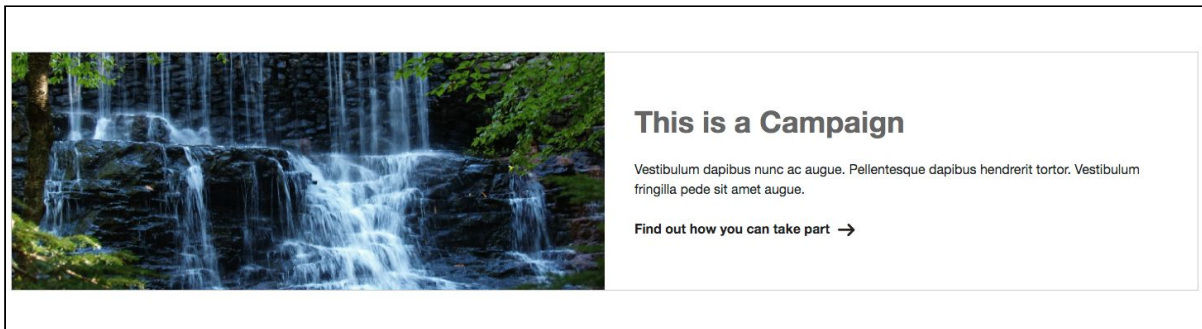
The Promotion block draws the user's attention to an important feature or news post by displaying a large custom background image across the full-width of the site with large text and an optional button, over the top.



1. In the page or post edit, with a full-width layout, add the **Promotional** block
2. Add a **Title** of your promotion as well a short **Excerpt** to on what it's about
3. Add an Image to the **Background Image**, from your media library or by uploading one from your computer. Landscape/sideways images work best
4. Click **Add Button** to add a button link to the promotion, providing a **Button label** and an *internal* site page or *external* for the **Link to page** field
5. Setting the **Button Style** as Primary, Secondary or Bright, makes the button appear Solid with white text, a black border and text, or, solid white with black text (screenshots below)
6. You can, if you like, also change the **Style** of the promotion to be Standard or Large, changing the length of the promotion block on the page
7. Click Update, on the Page or Post, to save any changes made




Campaign



The Campaign block is similar to the Promotion block, as it draws the user's attention to a single feature or post, this time splitting the block in two, with an image and text section.

Title *	This is a Campai
Excerpt	Vestibulum dapib
Interaction Prompt * <i>Choose a compelling phrase to encourage interaction, e.g. "Find out how you can take part".</i>	Find out how you

Media Type	Image
Image * <i>Choose an image to use as part this block.</i>	

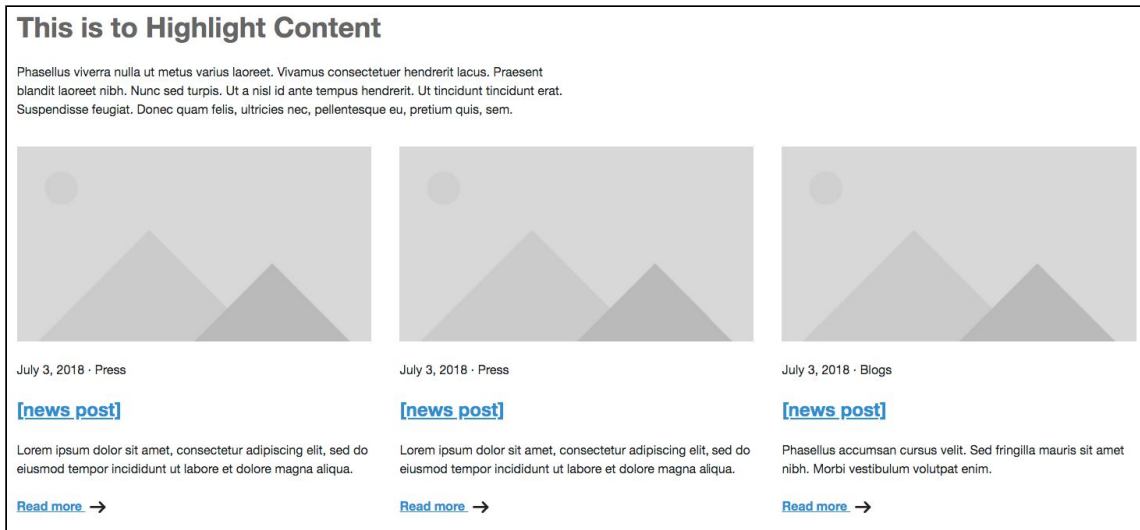
Link Type	<input checked="" type="radio"/> Internal Link <input type="radio"/> External Link
Internal Link *	http://mon:ere.wpengine.com
Link Behaviour <i>Should the link content open in a new browser tab or remain in the current browser tab - directing away from currently viewed content?</i>	<input type="checkbox"/>

1. In the page or post edit, with a full-width layout, add the **Promotional** block
2. Add the **Title** of your campaign as well a short **Excerpt** on what it's about
3. Add an **Interaction Prompt** to encourage your users to click and learn more
4. You can then choose to display an **Image** or **Video** in the
5. Provide an **Internal** or **External Link** to where users can find out more, choosing **Link Behavior** for whether it opens in the same or a new tab
6. **Background Colour** changes the colour behind the Campaign block
7. Click Update, on the Page or Post, to save any changes made

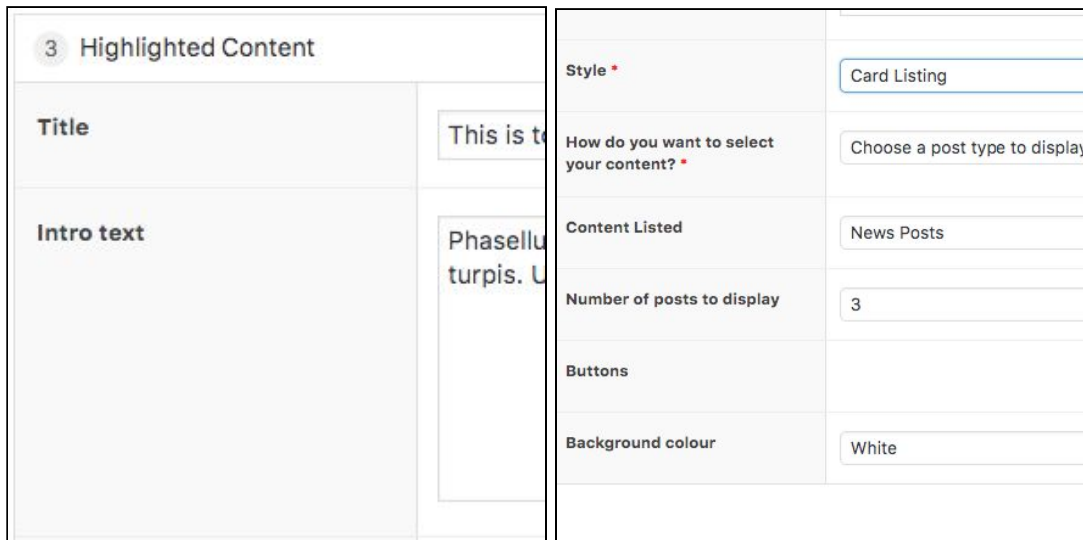
Preview

Highlighted Content

The Highlighted Content block adds up to 6 large images, across the page, that link to pages and posts. The pages and posts can be selected manually or from an automated feed of latest News posts, Jobs or Events.



1. In the page/post edit, with a full-width layout, add the **Highlight Content** block
2. Add the **Title** of your Highlighted Content and short **Intro Text** on what it's about
3. Choosing the **Style** does the following to the highlighted content links
 - a. *Natural Listing* - shows the image links with their text side by side
 - b. *Card Listing* - as above, with a border around each image link
 - c. *Emphasised Listing* - stacks the image links vertically, fitting the width of the page, each with a border
4. Choosing **How do you want to select your content?** selects between a
 - a. *Manual Selection* of pages/posts/jobs/events,
 - b. *Post Type* to display latest posts of a type, or
 - c. *Show Child Pages*, showing the child pages of the current **Leader** page you're editing. This only works on **Leader** pages
5. **Number of posts to display** can be set to 3 or 6 as preferred
6. You can add a **Button** link to the bottom of the Highlighted Content block
7. **Background Colour** changes the colour behind the Highlighted Content block
8. Click Update, on the Page or Post, to save any changes made

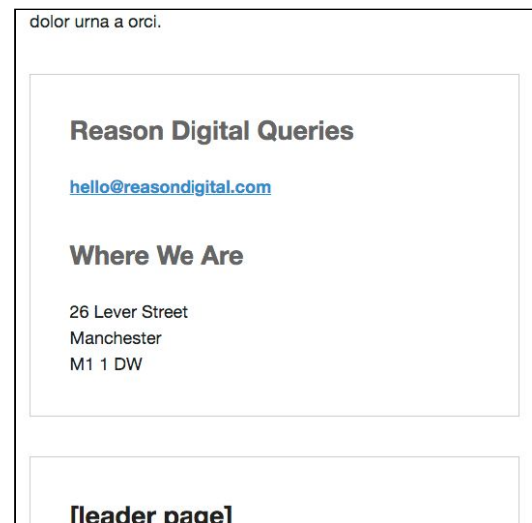


Summarise

Contact Details

The contact details block adds an **Email Address**, a **Phone Number** or an **Address** to the Secondary area of a page. More Contacts Details can be added to the block.

1. In the page or post edit, select the **Contact Details Block** in the Secondary area
2. In **Contact Details**, select the **Type** of contact; Email Address, Phone Number, or Address
3. Provide the contact name or place of business in the **Label** field
4. Enter the actual Email Address, Phone Number, or Address into the predetermined field, underneath
5. Click **Add Contact**, and follow the above steps again, to add more details
6. Click Update, on the Page or Post, to save any changes made



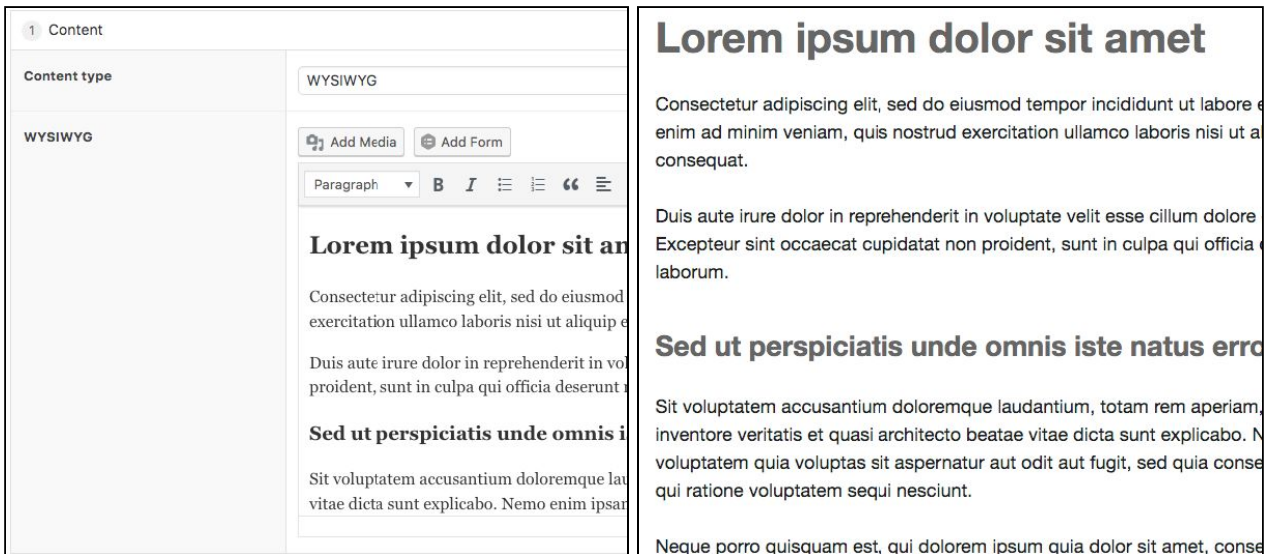
Inform

Text

The WYSIWYG Editor enables adding medium to long paragraphs of text and images.

The WYSIWYG Editor **Body** works much like a Word document. With the 'Visual' tab selected, you can;

- Choose Paragraph Styles (Paragraph, Headings 1-6)
- Type and align text/copy
- Add links to internal or external pages
- Add Bullet and Numbered points
- Add and arrange Images by uploading them, or, from the [Media Library](#)
- Click Update, on the Page or Post, to save any changes made



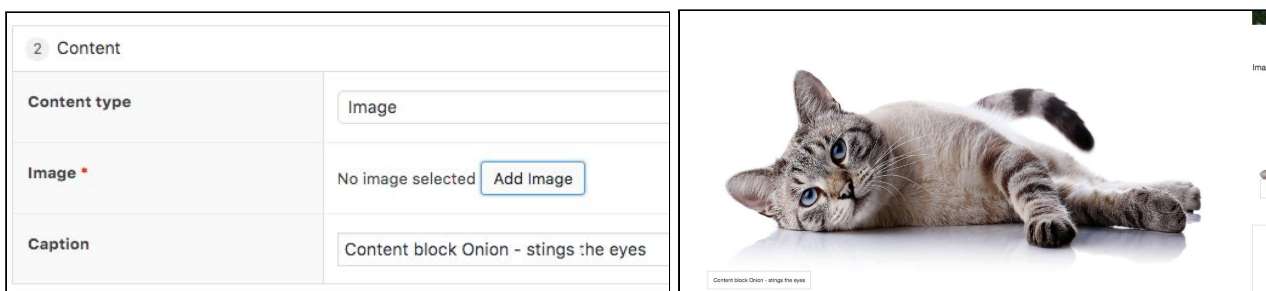
It's also possible to **Add CTA Button**, to insert a button link to another page or link to an email address.

Add CTA Button?	<input checked="" type="checkbox"/>
Button Text	View more
Link Location	<input checked="" type="radio"/> Internal Link <input type="radio"/> External Link
Page Link	About Us
Link opens in a new tab	<input type="checkbox"/>

Image

The Image block places a chosen image that fits the width of the primary content area.

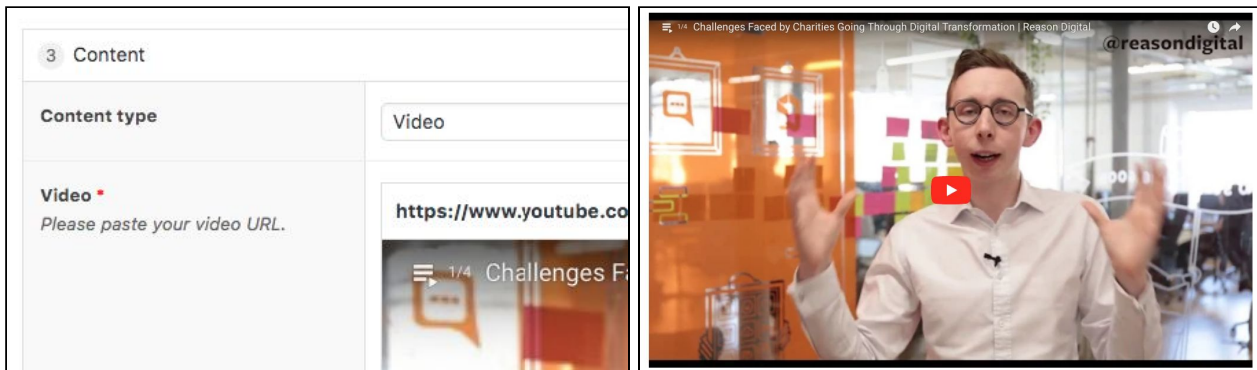
1. Select the Content - Image block
2. Click 'Add Image', and select an image from the Media Library
3. Add a caption to the image
4. Click Update, on the Page or Post, to save the changes made



Video

The Video block places a video from the web, that can be clicked to play, into the width of the primary content area.

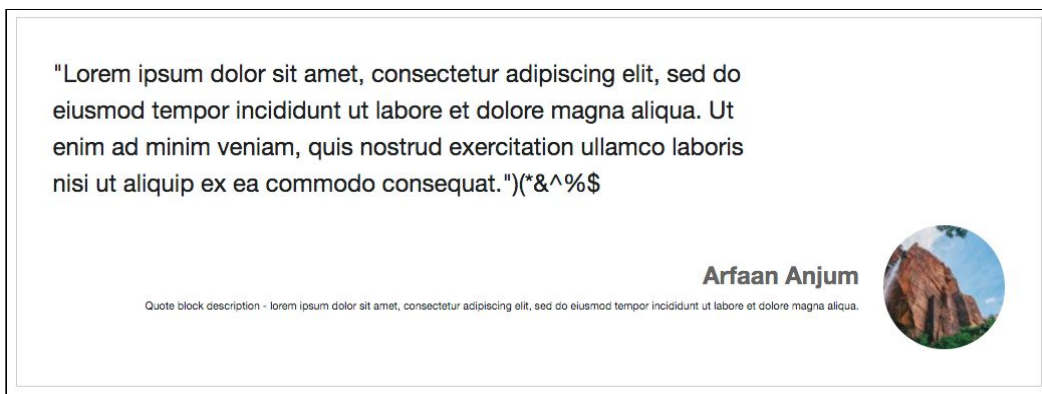
1. Select the Content - Video block
2. Copy and paste a video link - for example, the web address of a YouTube video into the 'Video' field
3. Click Update, on the Page or Post, to save the changes made



Quote

The Quote block creates a highlighted quote, with its citation (author's name) and an optional description.

1. In the page or post edit, select and add the Quote block
2. Enter the quote into the 'Quote' field, and the author's name in 'Citation'
3. Click 'Add Image' in the 'Avatar' field to select and add an image of the author
4. Add an optional Description that will appear under the Author's name
5. Click Update, on the Page or Post, to save the changes made



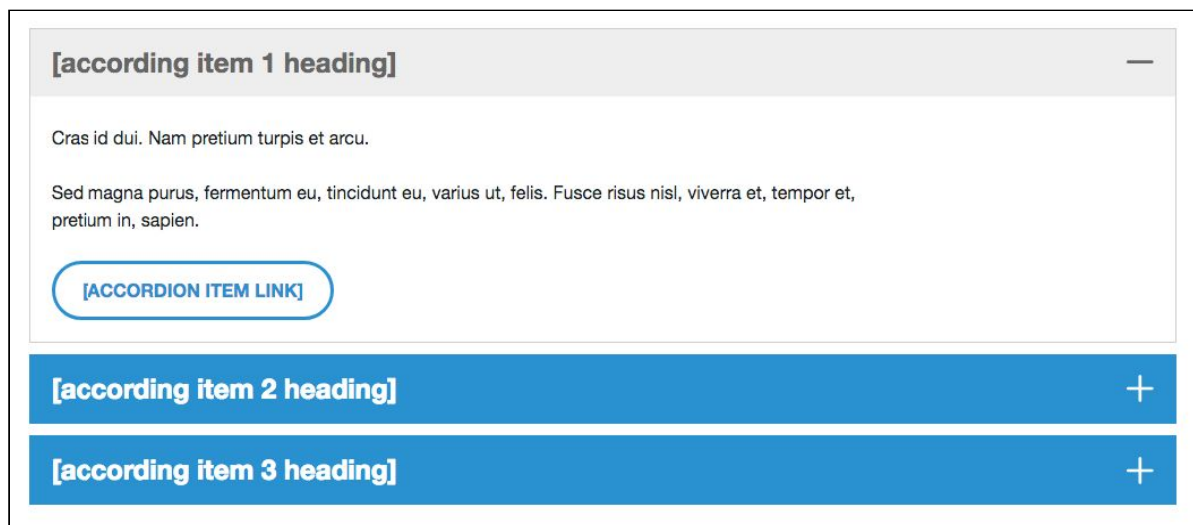
Accordion

The Accordion block allows you to add items of info, maybe on a certain topic, that open and collapse as the user clicks on each item. The Accordion is useful for easily showing/hiding information as the user needs to needs it and, therefore, also saving space on the page, particularly on mobile devices.

1. In the page or post edit, select the **Accordion** block
2. Enter the Accordion's first Item **Heading**
3. Enter the Accordion's first Item **Content**. This behaves just as the [WYSIWYG](#) does, allowing formatted text and images.
4. Click the '**Add a Link?**' checkbox to add an optional link into that Accordion item
5. Click '**Add Row**' to add another Accordion Item and so on, as above

- Click Update, on the Page or Post, to save the changes made

There is also a checkbox to '**Close open items when one is opened?**', so that items will close when the next item is clicked. All this applies to desktop and mobile.



Staff

The Staff Block allows the adding of individual staff photos with their name, role title and a description. One Staff Block represents one Staff member, so a block needs to be added for each member you wish to display.



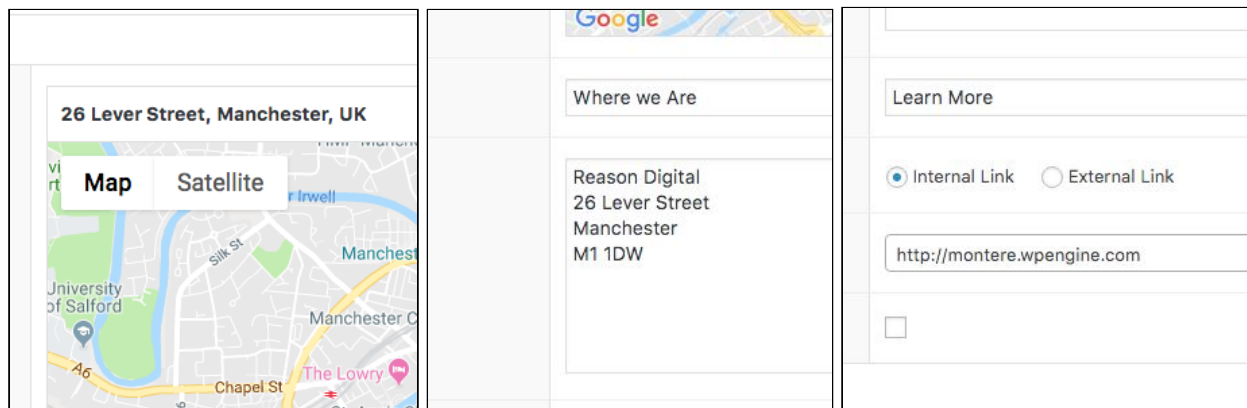
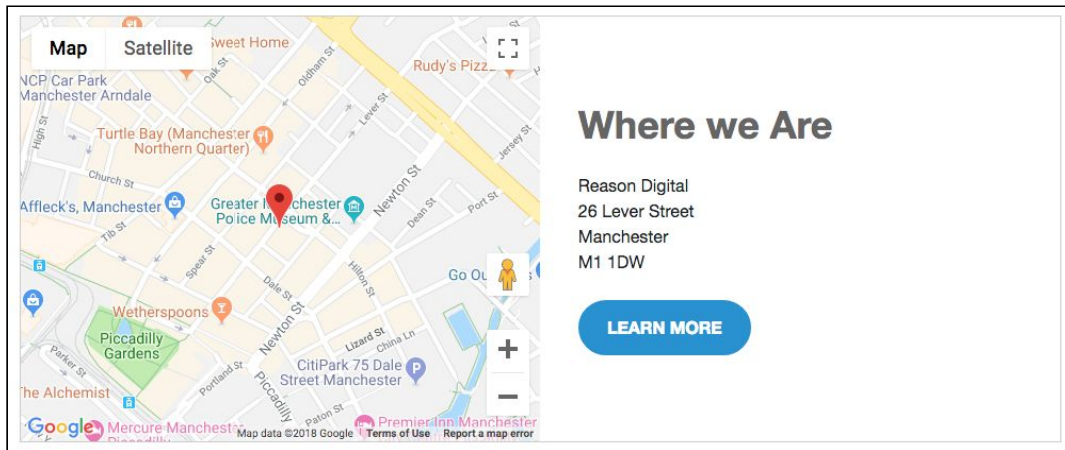
- In the page or post edit, select the **Staff Block**
- In the **Employee Photo** field, select Add Image, then Select an image of your staff member from your media library or by uploading one from your computer

3. Enter the **Employee Name**, their **Role Title** and a **Role Description**, on the responsibilities and duties they have
4. Click Update at the top of the page/post to Publish the new changes

Detail

Map

The map block is as simple as it sounds - it publishes a map of your choosing, by Google, onto your page. Great for your Contact page, or for pages about where you offer your Services, for example.



1. In the page or post edit, select the **Map Block**
2. Type in the placename, street address and/or postcode you wish to show in the **Map Location** field to show a map of where it is, changing the *zoom* of the Map Location, if you wish
3. Optionally, add a **Title** for the Map Block itself
4. Enter the same full address in to the the mandatory **Address** field to show this as text, next to the map, on the page.
5. Click Update at the top of the page/post to Publish the new changes

Table

The Table block is as simple it sounds - adding a table of information or data into your page. You simply add columns and rows and populate each cell with text. **Columns** have *Titles* formatted differently to the text of the table cells, but there are no Row titles.

Column A	Column B
Cell A1	Cell B1
Cell A2	Cell B2
Cell A3	Cell B3
Cell A4	Cell B4

	A	B	
	Column A - Some type	Column B - Some type	
+	1 Cell A1	Cell B1	-
+	2 Cell A2	Cell B2	-
+	3 Cell A3	Cell B3	-
+	4 Cell A4	Cell B4	-

1. In the page or post edit, select the **Table** block
2. Click the **+** buttons to add more **Columns** and/or **Rows** to the table
3. Enter text into the **Cells** that are created by the Columns and Rows
4. Click Update at the top of the page/post to Publish the new changes

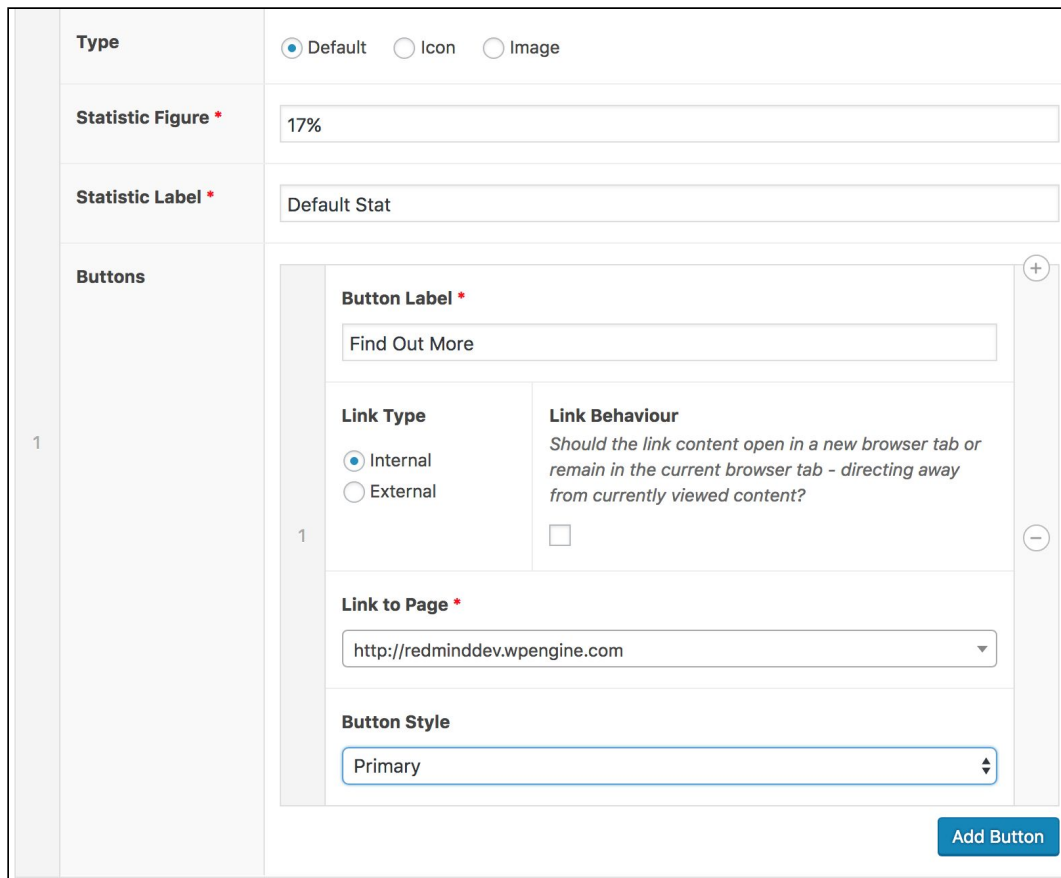
Statistics

The Statistics block enables you to add rows and columns of tiles that display a stat with a description, an icon or image, with an optional link button to navigate the user to a page or post related to the statistic.



1. In the page or post edit, select the **Statistics Column** block
2. Selecting the **Type** will change between displaying that statistic; on its own, with an additional icon or with an image
3. **Statistic Figure** is the actual stat you wish to display, such as; a **50%** or **5 in 10**
4. Th **Statistic Label** is to describe the above statistic; people said they

5. If you decide to add a **Button**, as a link to a relevant page or post, provide a *Button Label* and the Internal or External *Link to a Page*. Selecting the *Button Style* ... between a filled button, an outlined button or a text link



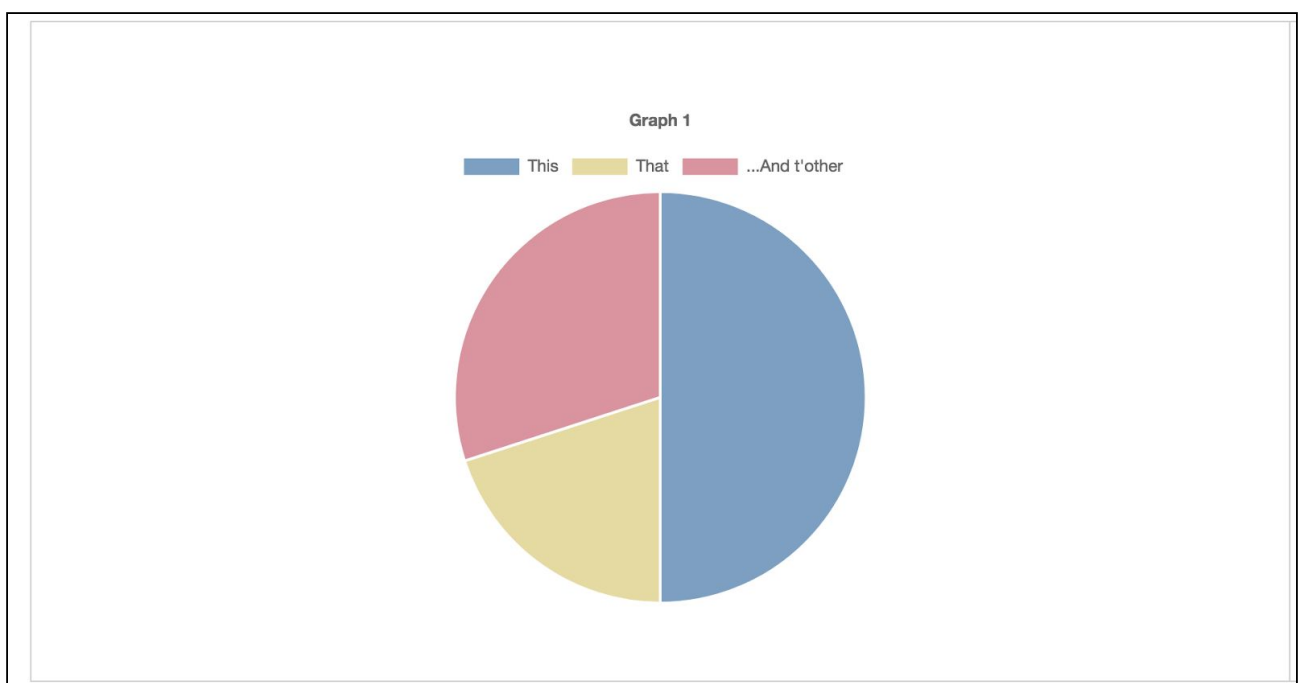
The screenshot shows the settings for a Button block in the WordPress Gutenberg editor. The settings are organized into several sections:

- Type:** Radio buttons for Default, Icon, and Image.
- Statistic Figure *:** A text input field containing "17%".
- Statistic Label *:** A text input field containing "Default Stat".
- Buttons:** A scrollable area containing:
 - Button Label *:** A text input field containing "Find Out More".
 - Link Type:** Radio buttons for Internal and External.
 - Link Behaviour:** A checkbox with the label "Should the link content open in a new browser tab or remain in the current browser tab - directing away from currently viewed content?". The checkbox is currently unchecked.
 - Link to Page *:** A dropdown menu showing "http://redminddev.wpengine.com".
 - Button Style:** A dropdown menu showing "Primary".

An "Add Button" button is located at the bottom right of the settings panel.

Graphs

The Graphs block allows you to enter data, and easily switch between showing the data as a **Bar**, **Pie**, or **Line** graph.



Each row of data represents a dataset on the graph, and each value in a column of data represents a bar/segment or value, for that dataset, in the graph.

You can add *Labels* to each dataset (row) and enter *Source* text to certify the data you're using. It's also possible to add *Content* into the Graph block, which could be used to describe how the data was collected, what it represents and what you intend to do with it, for example.

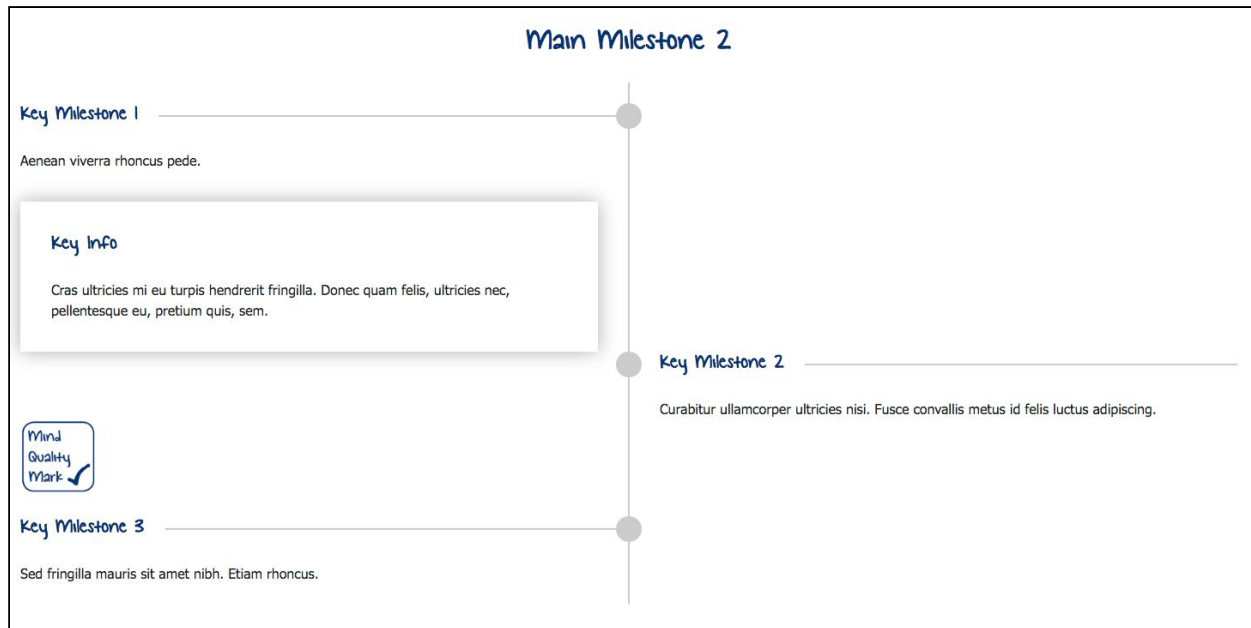
The screenshot shows the WordPress Graph block editor. The 'Graph' tab is selected. The 'Type' section has 'Pie / Doughnut' selected. The 'On larger screens, displays on...' section has 'Left' selected. The 'Show as Doughnut?' checkbox is unchecked. The 'Title' field contains 'Graph 1'. The 'Graph Data' section shows a table with three columns labeled 'A', 'B', and 'C'. The first row is labeled 'This', 'That', and '...And t'other'. The second row contains the values 50, 20, and 30. The 'Source' field is at the bottom with the placeholder text 'Appears beneath the graph as a source citation.'

	A	B	C
This	That	...And t'other	
1	50	20	30

RoadMap

The RoadMap block helps visually represent steps to get to an outcome or goal. Examples of where this could be used are for outlining application processes for service users and volunteers, or showing how far the charity/organisation has come or what they want to achieve in the future, for example. These uses are not mandatory though.

The block consists of a main vertical line with other lines splitting off, with headings, images and text to represent milestones.



1. In the page or post edit, select the **RoadMap** block
2. In the **Introduction** tab add the required *Heading*
3. Change to the **Milestone** tab to see **Main** and **Key** Milestones and enter a Milestone title.
4. Each **Main Milestone** is like a heading in the Roadmap. Each **Key Milestone** sits under its Main Milestone and displays **Main Content** and **Key Info** (optional) about that Key milestone. You can **add** (+) as many of each as you like
5. **Main Content** displays directly beside the milestone *line*. **Key Info** displays in a *tile* under the main content.

Milestone Title

Main Milestone 2

Key Milestones *

Content +
The main content for this milestone.

Icon
No image selected

Heading *
Key Milestone 1

1 **Text *** -
Aenean viverra rhoncus pede.

Image
No image selected

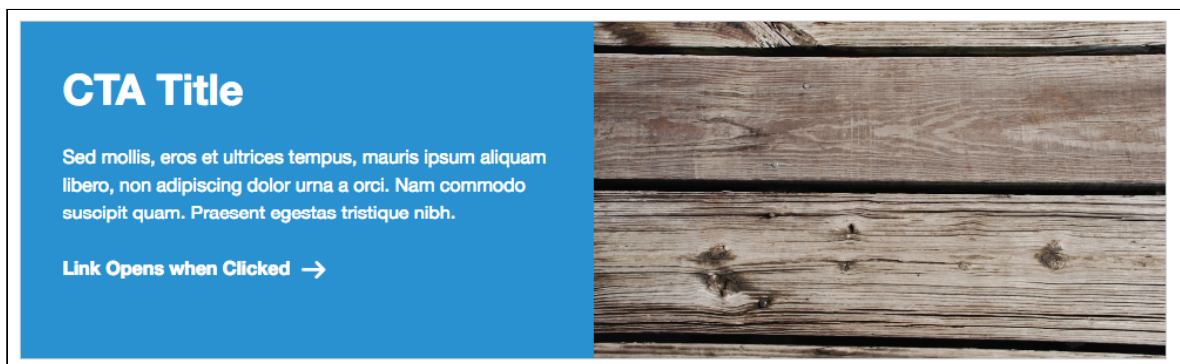
Key Info (Optional) ▶
The Key Info content for this milestone.

Action

Call-to-Action

A CTA, or Call to Action, is a great way of drawing the user's attention to another part of the website, or even external websites if necessary. Providing more emphasis than a standard text link, a call-to-action block is useful for encouraging a visitor's main action on a page.

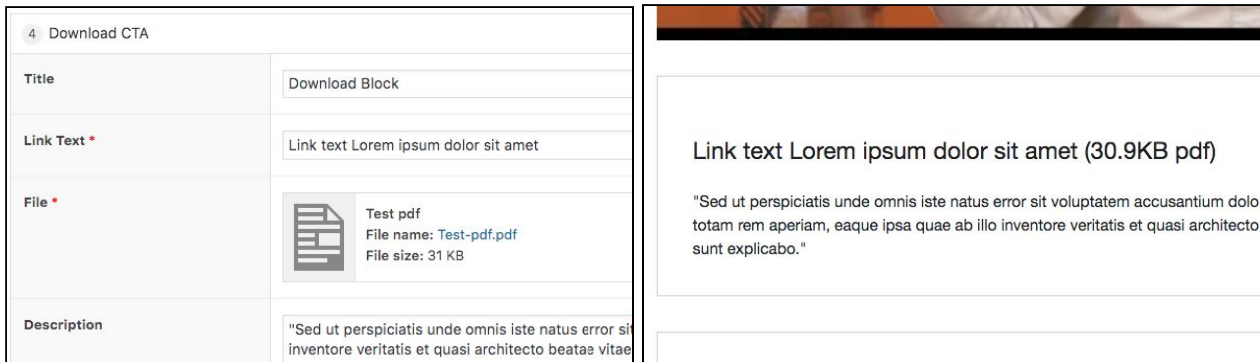
1. In the page or post edit, select the **CTA** block
2. Add in and populate the mandatory fields *****; **Image, Title, Text, Link Title** and **Page Link**
3. You can select an image already in your media library or directly upload one from your computer
4. In the Text field, think about what describes the link best, and what would encourage a user to click on the link
5. The Title is the title of the CTA block itself, whereas the Link Title text represents the link your user goes to
6. **Link Location** means you can either select an *Internal* page from your site, or, type/paste in a web address of an *External* site page
7. You can also check '**Link opens in a new tab**' so that clicking the link opens a new tab in the user's browser, which is useful for *External* pages.
8. Click Update at the top of the page/post to Publish the new changes



Download

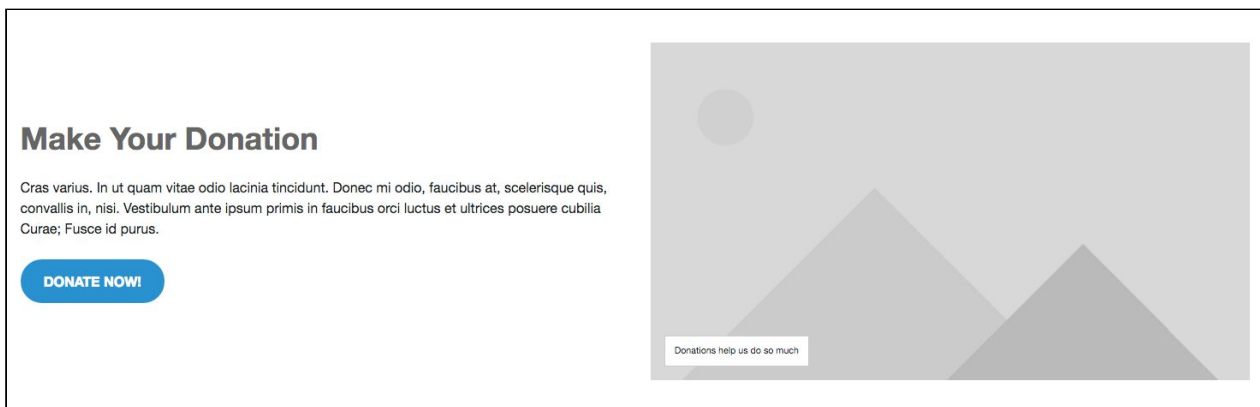
The Download CTA allows you to attach a file, such as a PDF, ZIP file or Word document, to a page or post so that a user can simply click to download it.

1. Select and add the Download CTA
2. Give the Download CTA block 'Title', which is optional
3. Give the file a title that appears on the page/post, by filling in the 'Link Text' field
4. Click 'Add file' and select a file from the 'Media Library', or direct from your computer by clicking 'Upload Files'
5. Add an optional 'Description' to the download block to give further info or instructions on the download file.
6. Click Update, on the Page or Post, to save the changes made




Donate Prompt

Adding a Donation Prompt to your page, or post, links the donation system that should be already set up on your site, meaning when users visit that page or post, and go straight to your *internal*, or *external*, donation page/process, from there.



1. In the page/post edit, with a full-width layout, add the **Donation Prompt** block
2. Select the **Content Type** to display either **Image** or **Video**, selecting the image from media library or by upload, or, selecting the video by typing in its URL
3. If you like, enter a **Caption**, that displays in the corner of the image/video
4. Add the **Title** of your Donation Prompt and provide **Text** on what it's about
5. Then, vitally, add a **Call-to-action Button** for users to click and go to your *internal* or *external* donation process page. Provide a **Button Label** title, and the **Link to Page** name or web address
6. **Button Style** can be set to Primary, Secondary or Bright, displaying the button; Solid with white text, a black border and text, or, solid white with black text (screenshots below)
7. Click Update, on the Page or Post, to save the changes made

Content type Select the kind of content you want to add.	Image	Buttons
Image *		Button label * Donate Now!
Caption	Donations help us do so much	Link type <input checked="" type="radio"/> Internal <input type="radio"/> External
		Link Behaviour Should the link content open in a new tab - directing away from the page. <input type="checkbox"/>
		Link to page * http://montere.wpengine.com

Title *	Make Your Donation
Text	Cras varius. In ut quam vitae odio lacinia tincidunt. Donec mi odio, faucibus at, scelerisque quis, con ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Fusce id purus.

Social Sharing

Adding the Social Sharing block to a page or post displays a strip of buttons with logos linking to their relevant social media sites; Facebook, Twitter, LinkedIn, and Email.



Which Facebook, Twitter, LinkedIn accounts and which Email address, the links go to is defined in [Options > General > Social Sharing](#).

1 Social Sharing
Social Sharing Bar
This will show a Social Share bar, from sharing options defined in Options > General > Social Sharing .

Gravity Form

Adding this content area, selects an existing [Form](#) that then appears on the page, so it can be filled in and submitted by a user.

1. Select and add the Gravity Form block
2. Select a **Form** from the list
3. Tick/Untick to show or hide the Form Title on the page

4. Tick/Untick to show or hide the Form Description
5. Click Update, on the Page or Post, to save the changes made

8. Saving and Publishing

Saving and Publishing applies to [Pages](#), [Posts](#), [Events](#) and [Jobs](#).

- **Save Draft**, saves any new changes to an unpublished version, and does not appear on the site.
- **Preview**, opens a new tab showing how the page/post/event looks, without it being published. This is useful when it is in draft.
- **Publish** (or *Update*), puts the page/post/event up to the website. Setting the Publish **Status** to Draft, takes the page/post/event off the site and sets it back to draft.
- Clicking *Edit* under Publish pages/posts/events/ can be **Scheduled** to a future date/time. The page/post/event will then only be visible to users, from that point in time.
- **Move To Bin**, takes the page/post/event off the site. It can be either deleted or restored from the Bin.

Logged in as a Contributor, clicking the **Update** button will set the Status to **Pending Review**, where an Editor or Admin moderates the changes before publishing.

It's important to note that when it comes to an **Event**, its Publish date is *not* the event's actual Start Date - it's just when the Event appears on the site.

9. Media

9.1. Adding Media to the Library

In order to use any images, videos, audio clips or files, in Pages, Posts, Events or Jobs, they must be uploaded to the **Media Library**.

To see what's in the Media library simply click **'Media'** on the left panel of the Dashboard. You can scroll through or filter by media type and/or by Upload Date.

To **Upload** new files to the **Media Library**;

1. Click **'Add New'** and then, either;
2. Click **'Select Files'** and select the file(s)

Bare in mind that there is a max file upload size of 50MB.

You can **Delete** a media file by clicking on the media file and then, 'Delete Permanently'.

9.2. Selecting Featured Images

A page, post, event or job can be assigned a **Featured Image** that appears as a link on other pages. In the case of Pages, the Featured Image appears on its [Parent Leader](#) page. Featured Images for [Posts](#) and [Events](#) appear on the relative Posts or Events listing page.

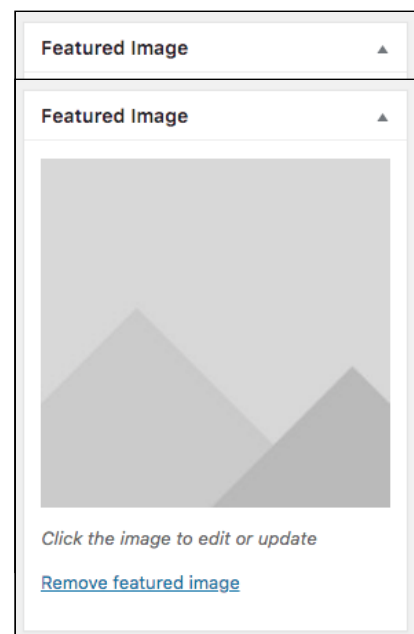
See [Selecting Images](#) for help on choosing the right image for Featured Images.

9.3. Selecting Images for Content

When **selecting an image** for a [Content](#) Block or [Featured Image](#), Wordpress will **fill** the **image frame** *with* the image so that there is *no* blank space. This is good because any image frame will be filled up with an image, but it does mean some parts of the *original* image will be missing in the image frame.

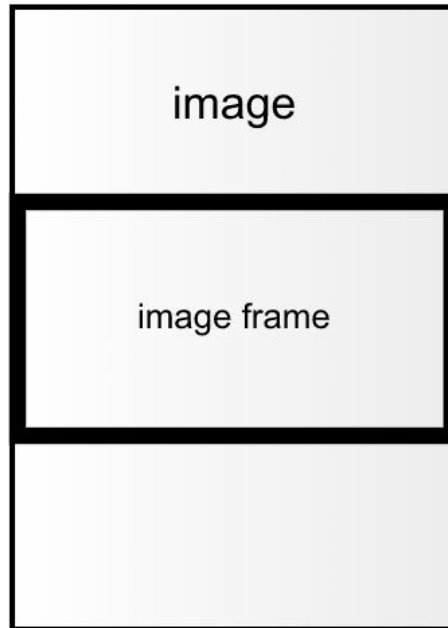
Below is a diagram to explain how a **landscape** image would *fill* a **thumbnail** (square) image frame. It's hard to know what size image the image frame is expecting without seeing, so it's best to just try different images and get a feel for it.

Landscape image in a Square Image Frame:



With **Images** being used to *fill* the **Image Frame** in Content blocks or **Featured Images**, it's possible that the part of the image you want to see isn't shown in the image frame. This is especially the case if you choose a *portrait* image for a *landscape* featured image, image frame.

Portrait Image in a Landscape Image Frame



There are two ways around this issue:

1. Choose/upload a *landscape* image, that will fill the Featured Image well
2. **Crop** the chosen image, choosing which section of the featured image you want to show

3. Cropping Images

You can **crop** images in the media library on selecting an image for a **Content Area** or **Featured Image**. This means its possible to choose an image, check how it looks, and then crop it, so it looks best for the **Image Frame** you're choosing the image for.

Please, *be aware* that once you've saved a cropped image, you cannot reverse the crop.



How to Crop Images;

1. On selecting an image for a Content Area or Featured Image of a Page, Post or Event, in the top right, click 'Edit Image'
2. Under 'Image Crop', enter an 'Aspect Ratio' of 16:9
3. Click and Drag over the image to make a crop
4. Drag 'n' Drop to move or resize the crop frame to how you want it
5. Click the Crop button in the top-left to finalise the crop
6. Click the 'Save' to save and exit

3. Forms

Forms are created and edited within Wordpress. They are an easy way of gathering information you need from users. Some examples of forms are; a newsletter sign up, registering to become a volunteer or getting in touch.

3.1. Adding Forms

Editing new and existing forms consists of the **Edit** and **Settings** sections. The Editor is where you create the **Fields** of the form. Settings is where you edit the user **Confirmations**, and admin **Notifications** messages.

Go into the the existing Forms' Edit options and see how they are set up. There are many different types of Form fields and also a number of different options, so below is a short guide to get you going in creating a basic form.

To add form Fields;

1. Go to 'Form' > 'Add New' > Add a title (description, optional)
2. Take a look at the **Standard Fields**, on the right panel
3. Choose one of the fields and click to add it to the form
4. Click on the added field to edit its properties, such as its field name, description and questions or options
5. Drag and drop fields in the order you want them to appear on the Form itself
6. Click 'Update' Save the form once completed

The image shows two screenshots of the WordPress Form Editor interface. The top screenshot displays the 'Contact Form' editor with a 'Single Line Text' field added, labeled 'Field ID 1'. The bottom screenshot shows the same editor with the 'Name' label for the field.

The image shows the 'Standard Fields' panel in the WordPress Form Editor. It lists various field types: Single Line Text, Paragraph Text, Drop Down, Multi Select, Number, Checkboxes, Radio Buttons, Hidden, HTML, Section, and Page.

3.2. Publishing Forms

Forms can be added to pages, posts, events or events by adding the '**Gravity Form**' *content area* into the *Flexible Content Block* and selecting the required Form. Users can then fill in the form directly on that page/post/event. They then receive the confirmation through to their email.

3.3. Form Entries

When a user fills in and submits a form on the website, the submission is recorded as in Form **Entries** in WordPress.

To view form Entries;

1. Firstly, ensure there have been submissions to a form
2. Open the Form and click Entries
3. Click an entry to view the form entry details by a particular user

3.4. Form Confirmations and Notifications

Form **confirmations** is what message displays to the user after they've submitted a form successfully.

Edit the Confirmations message

It's possible to edit what is sent to the user when they submit a form by;

1. In a new or existing form, go to Settings and select 'Confirmations'
2. Click 'Add New' and give it a Title
3. Select from one of the following types of message:

- a. *Text* - writing your own confirmation message
- b. *Page* - selecting an existing custom page
- c. *Redirect* - linking to an external confirmation page or service

Form **Notifications** are messages, usually as an email, sent to the user or admin users after a form is submitted. An example of a notification is the email the user and admin receive to confirm a new user registering to the site, or applying for a job vacancy.

Edit the Notifications message

It's possible to edit which fields, from a Form submission, are sent to an admin or other user, for checking. To do this, complete the following;

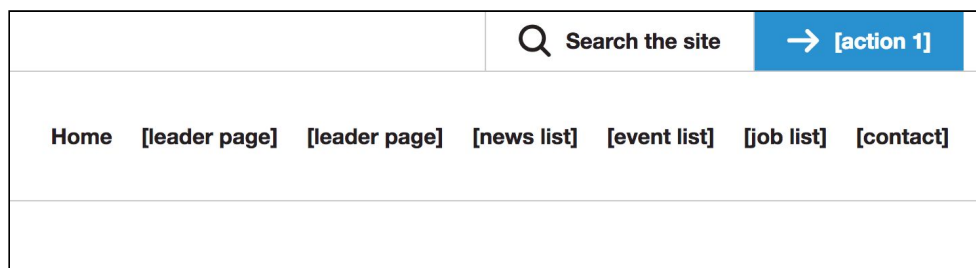
1. Go to a Form's Notifications and open the notification
2. In the Message section, delete '{All fields}'
3. On the right of the Message, click the 'Visual' tab
4. Click the small arrow button below, then select the individual fields you want - Name, Address (street), etc
5. Click 'Update'
6. Go to the page with the form, and fill in and submit
7. Check your email and confirm the notification message is as intended.

4. Header

The Header is top section that appears across your whole site. In the Header is a menu used to choose which *links* appear in the Header. The menu is organised differently to how pages are listed in the All Pages list.

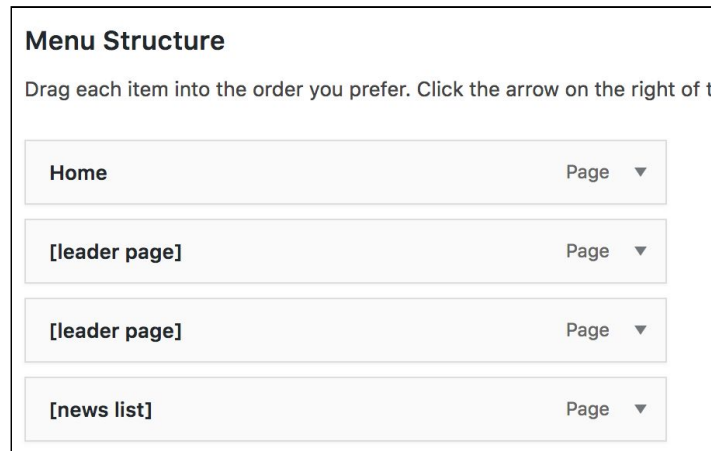
4.1. Header Menu

The Header contains the Primary Navigation **Menu**.



Add links to the Primary navigation:

1. 'Appearance' > '**Menus**'
2. On the left panel, find the page by clicking on 'Pages' or 'News Posts' > 'View all'.
3. Scroll through the 'View All' list until you find the page(s) you want to add to the primary navigation
4. Tick the page(s) and click 'Add to menu' to add them to the **Menu Structure**
5. Click 'Save Menu' to save changes



Changing the order of the navigation:

- In the Menu Structure, click and drag Page links to change their position in the navigation menu, and click Save Menu

Remove links from the Primary navigation:

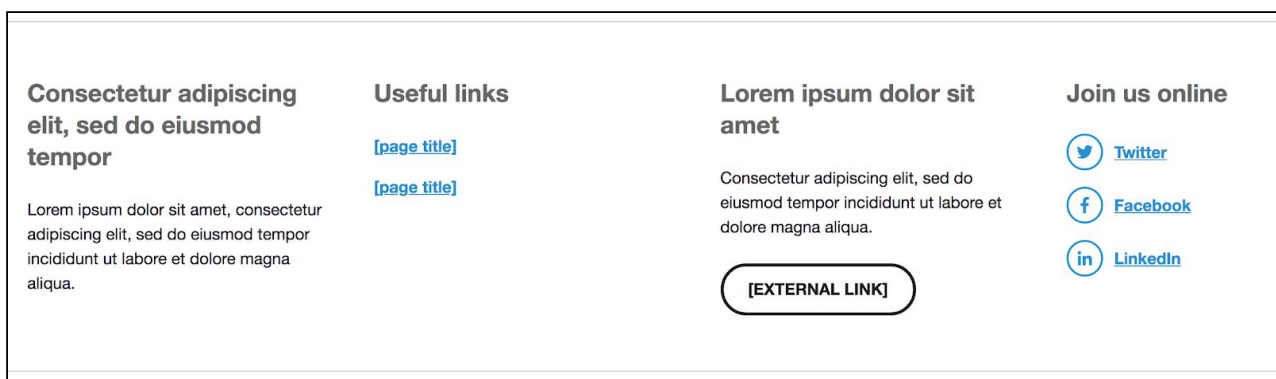
1. Click the **arrow** symbol on one of the links in the Menu Structure to expand it
2. Click the **Remove** button, and click Save Menu

5. Footer

The **Footer** is the bottom section that appears across your whole site. The Footer comprises of 3 optional and customisable sections. To edit the Footer go to Options > Footer.

5.1. Standard Footer Blocks

The first section, the Standard Footer Blocks, shows copy, links and social media from across your site. When added, these footer blocks display in a row across the footer.



Content

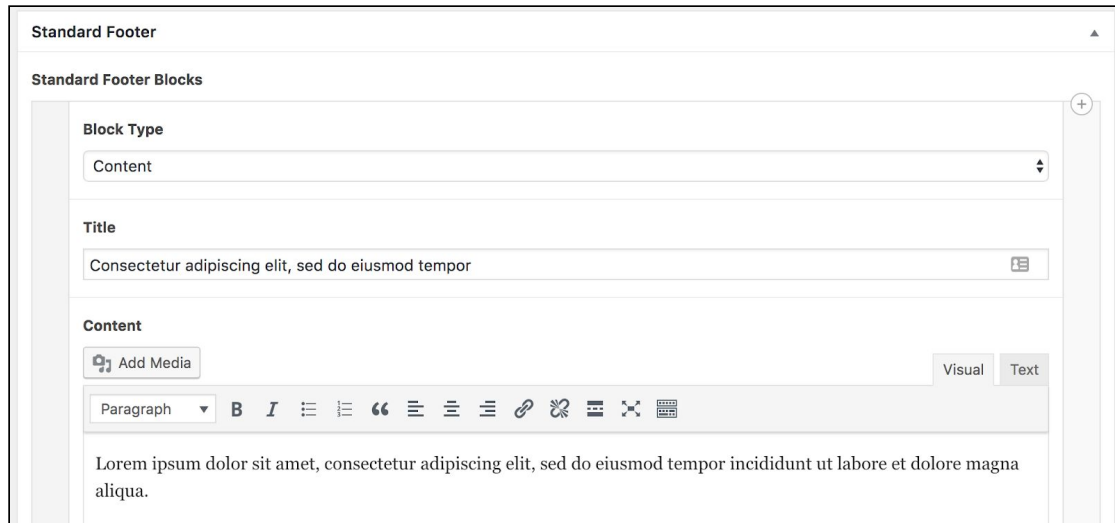
The Content block is the same as the WYSIWYG block on a page or post. To add a Content block to the Footer:

You can do the following editing and formatting:

- Choose Paragraph Styles (Paragraph, Headings 1-6)
- Type and align text/copy

- Add links to internal or external pages
- Add Bullet and Numbered points
- Add and arrange Images by uploading them, or, from the [Media Library](#)

And you can add a **Button** link to an internal or external web page.

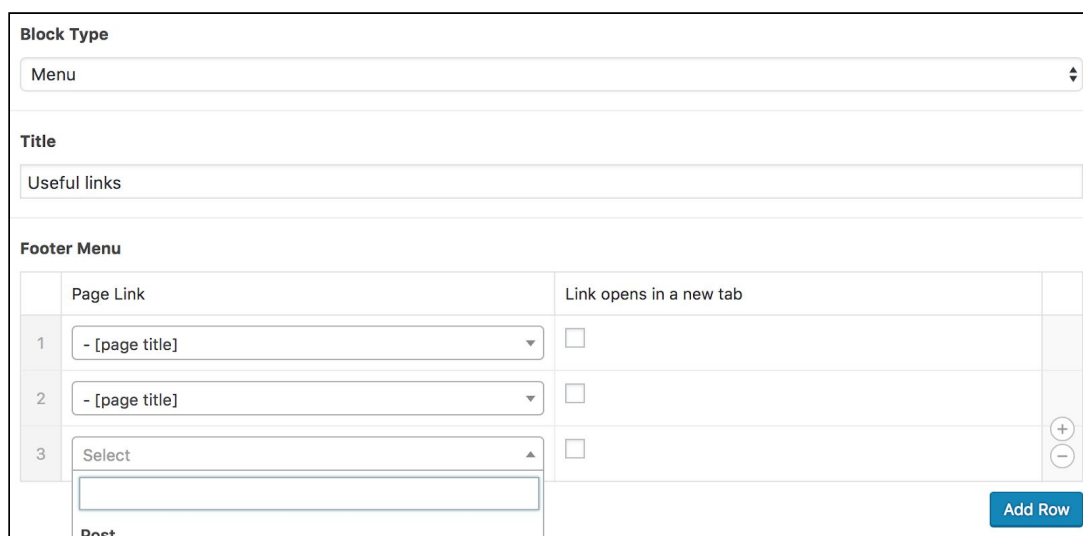


Menu

The Menu block creates a list of links to other pages or posts. This is good for pointing users to your Contact Us page, or other popular or necessary pages.

To edit **links** to a **menu** in the footer:

1. In the Dashboard, go to Options > Footer
2. Under the **Standard Footer Blocks** scroll down to find the **Menu** block type
3. To **add** a new link to the menu, click '**Add Row**' below the Footer Menu area
4. On the new link row click the dropdown, and either, scroll down to find the intended page, post, event or job, or search for it by typing
5. At the top of the screen, click **Update** to save your changes



Social Media Links

The Social Media links block automatically adds social media logos when the associated links are to them. The social media links to choose from are; **Twitter**, **Facebook**, **Instagram**, **YouTube** and **LinkedIn**.

To edit or add Social Media **Links** in the footer:

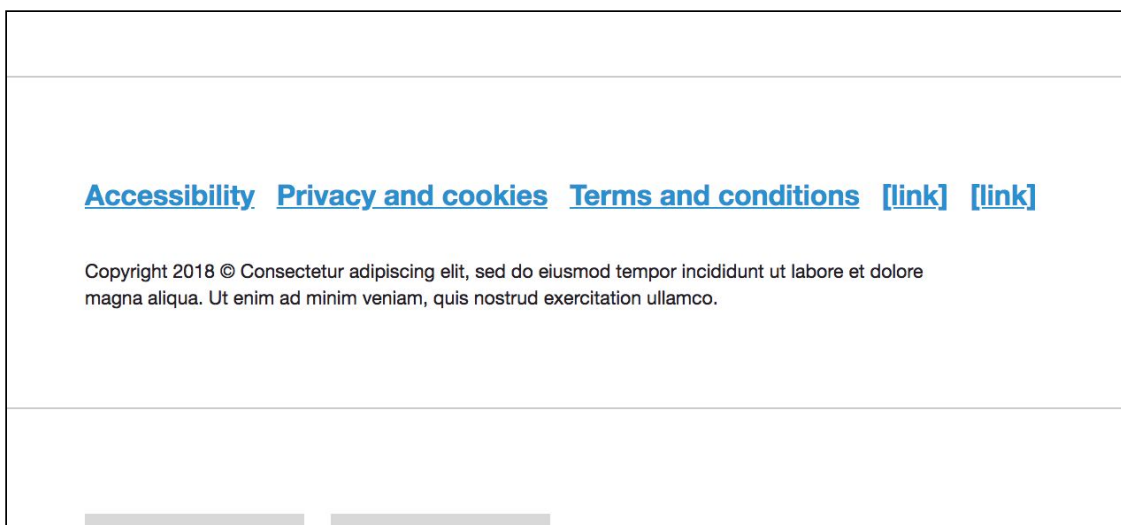
1. In the Dashboard, go to Options > Footer
2. Under the **Standard Footer Blocks** scroll down to find the **Social Media Links** block type
3. To **add** a new Social Media link, click '**Add Row**', below the Social Links area
4. In the '**Text**' field, enter what you want to display, such as, 'Facebook' or 'Share'
5. In the '**URL**' field, enter the full web address of your social media page, such as, '<https://facebook.com/reasondigital>'
6. At the top of the screen, click **Update** to save your changes



The screenshot shows the configuration interface for the Social Media Links block. It includes a dropdown menu for 'Block Type' set to 'Social Media Links', a 'Title' field with the text 'Join us online', and a 'Social Links' section. Under 'Social Links', there is a list with one item '1 Twitter'. Below this list are two fields: 'Text *' containing 'Twitter' and 'URL *' containing 'https://twitter.com'.

5.2. Legal Footer

The Legal Footer has links to pages such as your T&Cs and Privacy Statement.



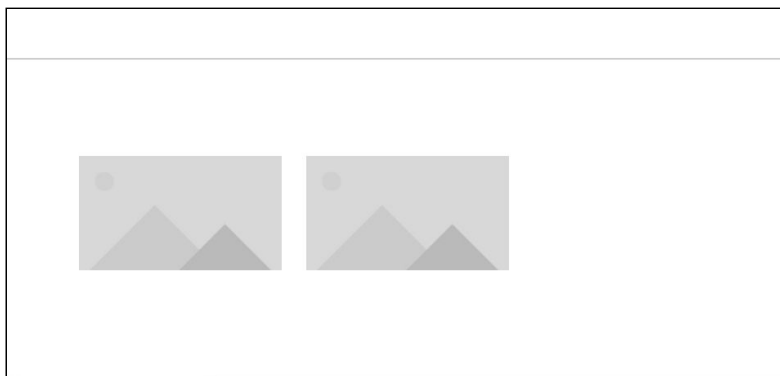
The screenshot displays the content of a legal footer. It features three blue underlined links: 'Accessibility', 'Privacy and cookies', and 'Terms and conditions', each followed by a '[link]' placeholder. Below the links is a line of placeholder text: 'Copyright 2018 © Consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco.'

To edit or add links in the Legal footer:

1. In the Dashboard, go to Options > Footer
2. Scroll down to the **Legal Footer**
3. Below the Links area, click **'Add Row'** to add a new page link
4. Enter a **'Title'**, select a **'Link Location'** (internal or external), and select an internal page, or type in an external web address in the **'Page Link'**
5. At the top of the screen, click **Update** to save your changes

5.3. Accreditation Footer

The Accreditation Footer, at the very bottom of the Footer, can show image links to associated websites, such as sponsors and awarding bodies. There are two columns available to fill with rows of links.



To edit or add links in the Legal footer:

1. In the Dashboard, go to Options > Footer
2. Scroll down past the Standard and Legal footer to the **Accreditation Footer**
3. Under the **First Column** click **Add Row**
4. In the **Logo** box, click Add Image and select an image from the Media Library for the logo of the link
5. Enter the web address to your chosen accreditation in the **URL** field
6. Click **Add Row**, follow the steps above, to add more rows to that column
7. Follow the above steps again in Column 2 to another column of logos



6. Users

You can add and manage users and their roles, ensuring that users have the right levels of access they need in order to do their work. Some users need their posts and edits moderated before publishing, which is particularly useful if you plan to get people blogging who aren't normally part of your communications team. Other users will have full administrative access. The top level of the user section is a list of all your current users including username, name, email and role.

User Profile Details

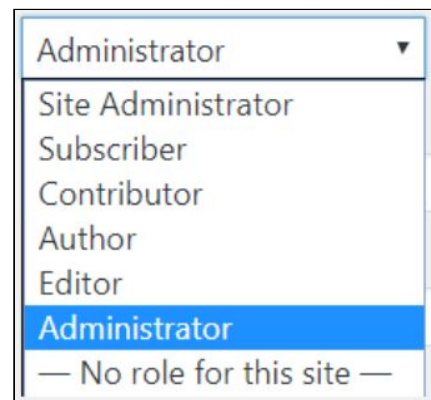
- Role - what permissions they have
- Name - First, Last, Nickname and Display name
- Contact info - email
- About - Bio, Profile picture
- Account management - Generate password

6.1. User Roles

Administrator

An administrator has full power over the site and can do everything, including:

- Installing new plugins
- Deleting the whole site
- Creating new users and admins
- Removing users
- Change user roles
- Complete control over
 - Pages
 - Posts
 - Uploads
 - Forms
 - Events (if applicable)
 - Donations (if applicable)
 - Comments (if applicable)
 - Settings themes
 - Imports/Exports



We recommend you limit administration of the site to an experienced individual or we, Reason Digital, maintain technical administration. All other aspects of site admin can be managed via the 'Site Administrator' role.

Site Administrator

A site admin has the same access level as an admin *except* the technical aspects such as settings, plugins and themes, which allows the user to manage the site without the risk technical issues;

- Creating new users and admins
- Removing users
- Change user roles
- Complete control over
 - Pages
 - Posts
 - Uploads
 - Forms (if applicable)
 - Events (if applicable)
 - Donations (if applicable)
 - Comments (if applicable)

Editor

An editor has permissions to add and publish content, as well as moderate and approve other users' content. They can;

- Create, edit, publish and delete any page or post including other users
- Moderate comments
- Manage categories, tags and links
- Manage events
- Manage forms

Author

An Author can create and publish their *own* content but cannot moderate or approve others'. They can;

- Create, edit, publish and delete only their own posts
- Upload files and images
- Edit comments on their posts

Authors cannot:

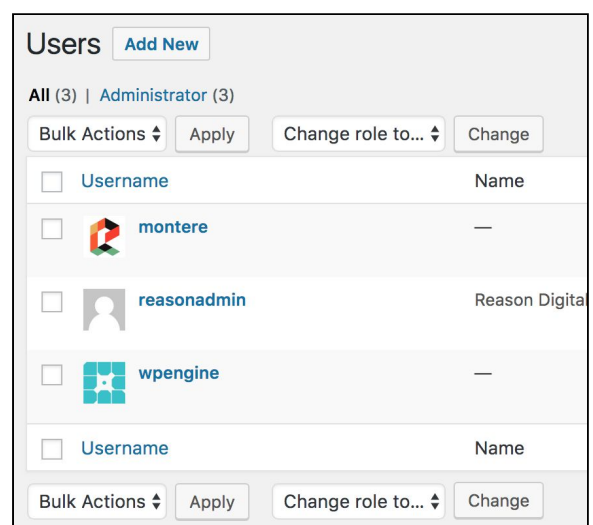
- Create, edit, publish or delete any pages

Contributor

A contributor can create and edit their own posts but cannot publish them. Their posts are automatically sent to an Editor (or higher role) to be moderated by, before being published.

Subscriber (if applicable)

Subscribers are users who have some access to areas on your site. This will only be applicable if there is actual *user login* functionality included on your site.



6.2. New Users

To add a new user go to 'All Users' and click 'Add New' at the top.

In the 'New User' form, as a minimum, you need to provide a username, email address and select a [user role](#). You can also add a first and last name, if you like.

Once this is done, click 'Add New User' at the bottom. The new user will be emailed instructions and a link to activate their account.

6.3. Passwords

A main cause of security breaches on websites is weak passwords. We strongly advise against reusing passwords and the format of any password should be random and not related to your organisation, such as; 'charityname123'.

All users are required to provide a strong password which requires a minimum of 10 characters. WordPress has a password generator which can help with this.

If you've **Forgotten** your password, you can *reset* your password from the **Login** screen. It's also possible, as an **Administrator** or **Site Administrator** user, to generate a *new password* for another user who needs a new password, if they've forgotten it, for example.

To Reset a Forgotten Password:

1. Go to the login screen by clicking the '**Login**' button or adding '/login' to the web address, in your browser
2. Click '**Lost your password?**', and enter your email address and click '**Get New Password**'
3. Check your **mailbox** (Junk too) for a Password Reset email, and click the link inside
4. Enter a rememberable password, with a minimum of 10 characters and click '**Reset Password**'
5. Click '**Login**' and login with your new password

To Generate a new Password for an existing User:

1. Log in as an Administrator or Site Administrator user
2. Click '**Users**' in the left hand menu
3. Search for the user you want to reset the password for by entering their **Email** into the top right search bar and clicking '**Search Users**'
4. Click the User, in the list, to open their account details
5. Scroll down to '**Account Management**' and click '**Generate Password**'
6. (*optional*) Change the password to something rememberable here, with a minimum of 10 characters
7. Click '**Update**' to save the new password to the user
8. Securely, share that password with the User and ask them to log in with it

7. Site Settings

7.1. Site Name and Tagline

To change what your site displays in the browser window title and when your website appears in search results;

1. Settings > General
2. Change the site title
3. Change the site tagline - the tagline appears after the title in browser windows and in search results, like Google

7.2. Personal Data

Export or Erase personal data collected by your wordpress set-up site, by going to ...

Tools > Importing and Exporting Personal Data

7.3. Privacy Policy

Set up automated links to your privacy policy page, when on login pages, for example, by selecting it in Settings > Privacy.