



## Word Press Overview

This is part of a series of primers about websites for small business owners. This document provides an overview of Word Press as a recommended content management system for your website.

References:

<https://wordpress.org/> - Note **.org** is the information site (.com is a platform)

<https://en.wikipedia.org/wiki/WordPress>

## Introduction

Wordpress was traditionally a blogging platform, that is now used by almost 1 in 4 websites worldwide. The main reasons for that is it is free, open-source (kept up to date), and provides a WYSIWYG interface for adding content to websites.

The system is built primarily with the PHP language, and available directly with most hosting services. There are literally thousands of programmers and offerings available to customize and extend the functionality of a WordPress site. Some options for customization are:

<http://themeforest.net/category/wordpress> - premium themes, most under \$100.

<http://99designs.com/wordpress-theme-design> - bid your project or hire designer

<https://www.elance.com/r/contractors/ind-true/cat-it-programming/q-wordpress> - hire designer

WordPress offers a number of specific features, with two main components to the web template system:

### Themes

WordPress uses page template sets called themes. Themes set the appearance (look and functionality) of the site and can be changed on the fly with very little impact to the site (only theme-specific functions). There are free themes, "premium" themes (for modest fees), and custom themes to your specification can be developed by capable programmers.

### Plugins

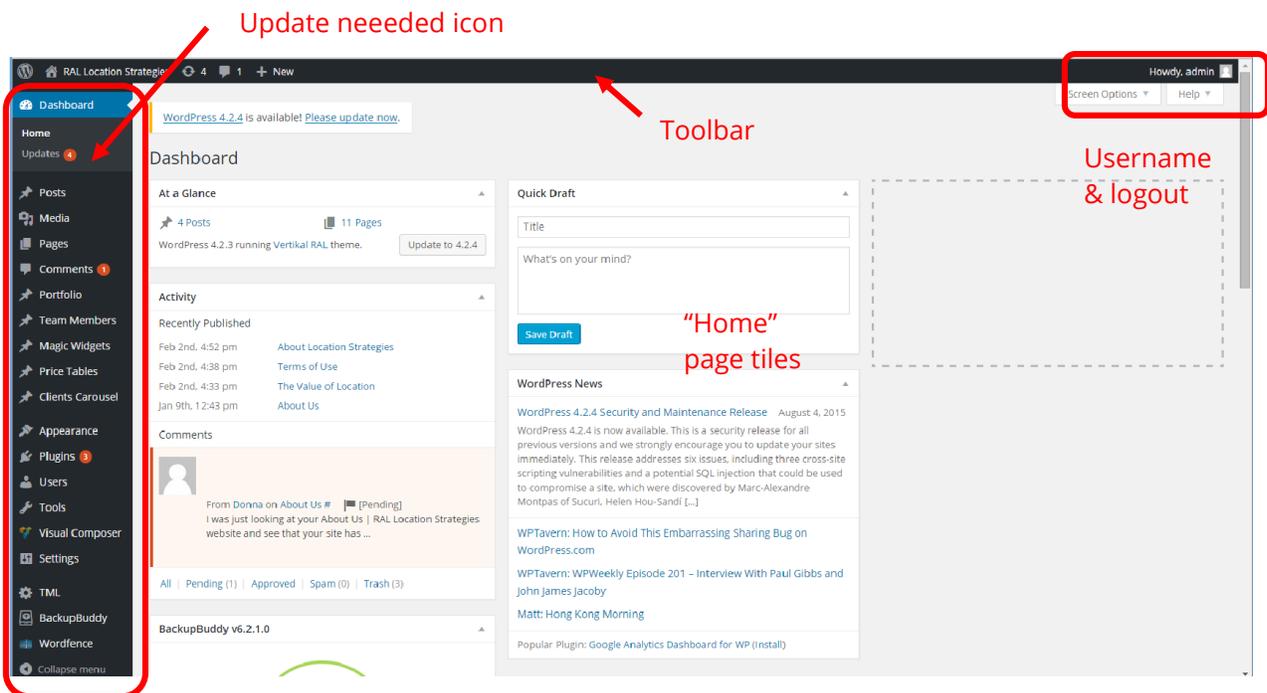
WordPress's architecture allows users to extend the features and functionality of a website with plugins. There are thousands available which provide custom functions similar to how apps work on mobile phones. There are free plugins, "premium" plugins (for modest fees), and custom plugins to your specification can be developed by capable programmers.

## WordPress Admin

The setup of WordPress on your server is not covered here. You will need to obtain the site login link, your username, and password from your site administrator. The menu items marked with an \* in this section are recommended to be used only by the site administrator to avoid potential problems.

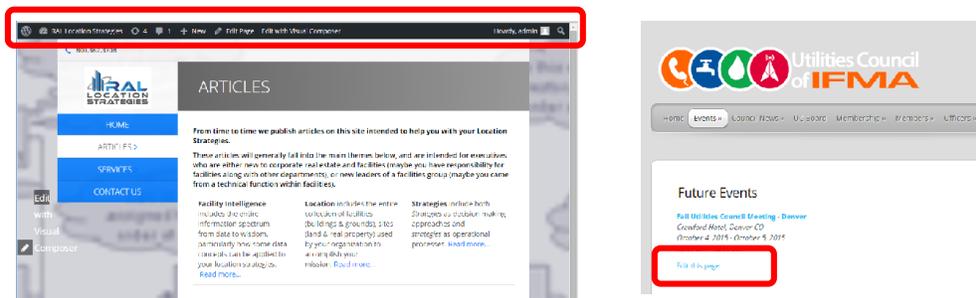
### Dashboard & Top Bar

When you first log into the site, you will normally see the dashboard screen, similar to that shown below (\*note, this can be hidden from selected user profiles).



Main Menu

The home page tiles can be configured a bit as you wish. If updates are needed, there will be a colored number. The primary menu items are down the left column; these are discussed further below. While you are logged in, you will get either the toolbar on the top (if you get dashboard) or a "edit this page" link on any page you visit where you have edit rights.



## Appearance \*

The appearance area is where you load and select the active theme.

It is advised to keep one of the default WordPress themes installed in case you have a problem with your custom theme and need to switch the site over temporarily.

The appearance area is also where you set the **main site menu** and widgets on various page templates. "Widgets" are little blocks of function pre-built into Word Press – or that come with plugins and themes.

## Plugins \*

These are some recommended plugins – there will be others of interest based on your needs. However, take care to test there is no conflict between them, and having too many active plugins will slow down your site.

- **Limit Login Attempts** - Limit rate of login attempts, including by way of cookies, for each IP.
- **Theme My Login** - Themes the WordPress login, registration and forgot password pages according to your theme.
- **BackupBuddy** - Backs up a customizable selection of files, settings, and content for a complete snapshot of your site. Restore, migrate, or deploy your site to a new host or new domain with complete ease-of-mind. (costs \$)
- **WordFence Security** - Anti-virus, Firewall and High Speed Cache OR
- **iThemes Security** - Protect your WordPress site by hiding vital areas of your site, protecting access to important files, preventing brute-force login attempts, detecting attack attempts and more. (Better than WordFence, but I have had problems with this one.)
- **All in One SEO** - Out-of-the-box SEO for your WordPress blog.
- **Anti-Spam** - No spam in comments. No captcha.
- Links with your newsletter/marketing program.

**Plugin-specific menus \*** - Many plugins will have their own items that get added to the menu, either as a new category or under the settings section.

## Settings \*

There are a number of settings that control overall display and function of the site, contained on the Settings menu. These are typically set once and left.

- Site title & Tagline
- Membership restriction and default role
- Time zone; Date and time format
- Language
- Writing & reading settings (mostly for blog posts); Reading sets Home Page
- Discussion settings – IMPORTANT: who can post, and whether it needs approval
- Media settings – folder style and thumbnail size
- Permalinks – how pages are named – SUGGEST: Post Name

## Users \*

By default, WordPress installs with 5 categories of users, with permissions as explained here: [https://codex.wordpress.org/Roles\\_and\\_Capabilities](https://codex.wordpress.org/Roles_and_Capabilities). These are sufficient for most purposes, and there are plugins with additional functionality if needed:

- **Administrator** – somebody who has access to all the administration features within a single site.
- **Editor** – somebody who can publish and manage posts including the posts of other users.
- **Author** – somebody who can publish and manage their own posts.
- **Contributor** – somebody who can write and manage their own posts but cannot publish them.
- **Subscriber** – somebody who can only manage their profile.

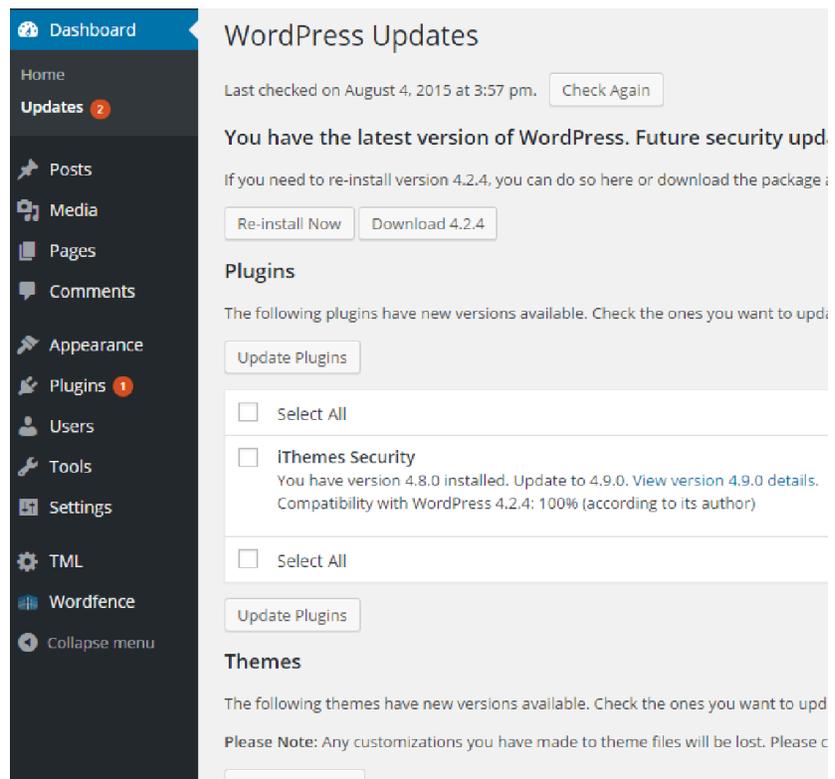
It is recommended that there be one generic admin user account and only one admin user person. You can have multiple editors for people who will be updating the site, or even authors if they will only be doing posts (and not pages). The default setting for new users is best left as “subscriber”.

## Site Backup \*

Because the majority of your WordPress site is actually in a database, and pages are built on the fly, it is important to back up your site. The media library files are not in the database, so the difference between a “database only” backup and full site backup includes these files and possibly the themes and plugins used on your site (depending on your backup method).

## Site Updates \*

It is very important to keep your site updated – because there are so many sites that use WordPress it is a target for hackers. When you login, there will automatically be a notification that you have updates available, and when you click the Update menu item you will get a page that lists them and lets you install all at once. From time to time, you have an update to the WordPress core system and you should check that your themes and plugins are compatible before making that update.



The screenshot displays the WordPress dashboard's update management interface. On the left, a dark sidebar contains navigation links, with 'Updates' and 'Plugins' highlighted and showing notification counts. The main area is titled 'WordPress Updates' and shows the last check time as August 4, 2015. It confirms that the user has the latest version of WordPress and provides options to re-install or download version 4.2.4. Below this, there are sections for updating plugins and themes. The 'Plugins' section lists 'iThemes Security' as available for update from version 4.8.0 to 4.9.0, with a compatibility note for WordPress 4.2.4. The 'Themes' section also indicates that new versions are available for some themes, with a warning that customizations to theme files will be lost.

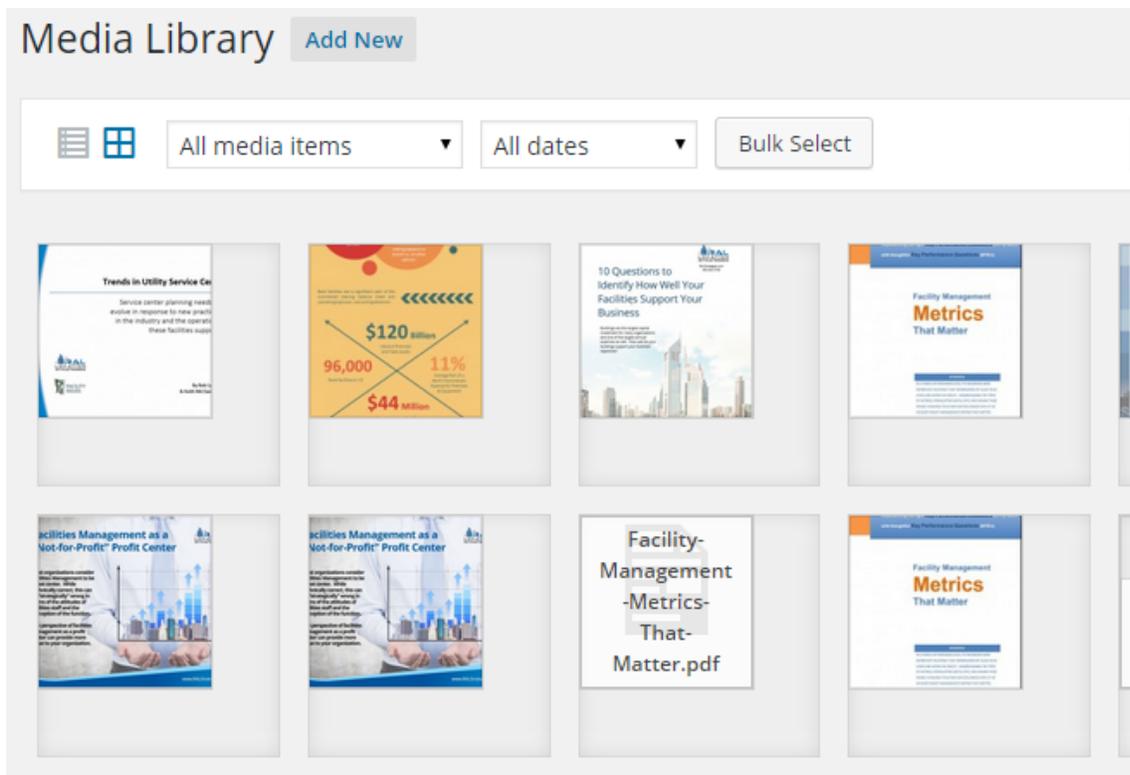
## WordPress Content Editing

Part of the power of WordPress is that it is an easy to use webpage editing system. If you wish to allow different people to draft content, but require review by a few editors, you can use the roles for that purpose. Or you can allow different people to create and edit different sections of the site.

### Media

The media library is a set of folders where all images, videos, documents are stored. You upload to this area before or editing content, and these files are then available to be inserted on any page or post.

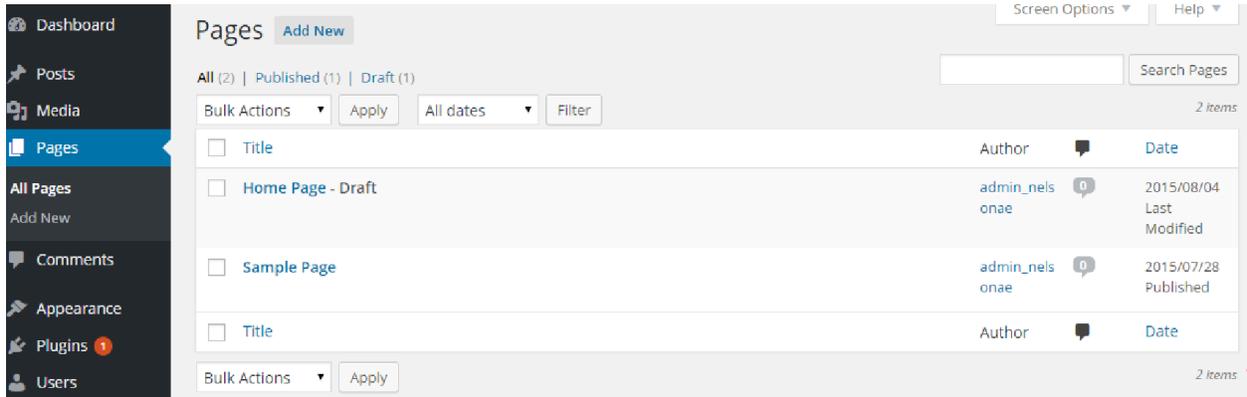
Files are easy to upload by selecting them on your computer and following the prompts. All items in the library will display a little graphic and can be selected with a click.



### Posts and Pages

There are two separate sections for Posts and Pages, but both work similarly. Posts are based on typical blog structure and traditionally are smaller articles that are displayed most recent first. They can be organized by date and category (user-defined). Pages are static, more like traditional web pages, based upon the template selected for them.

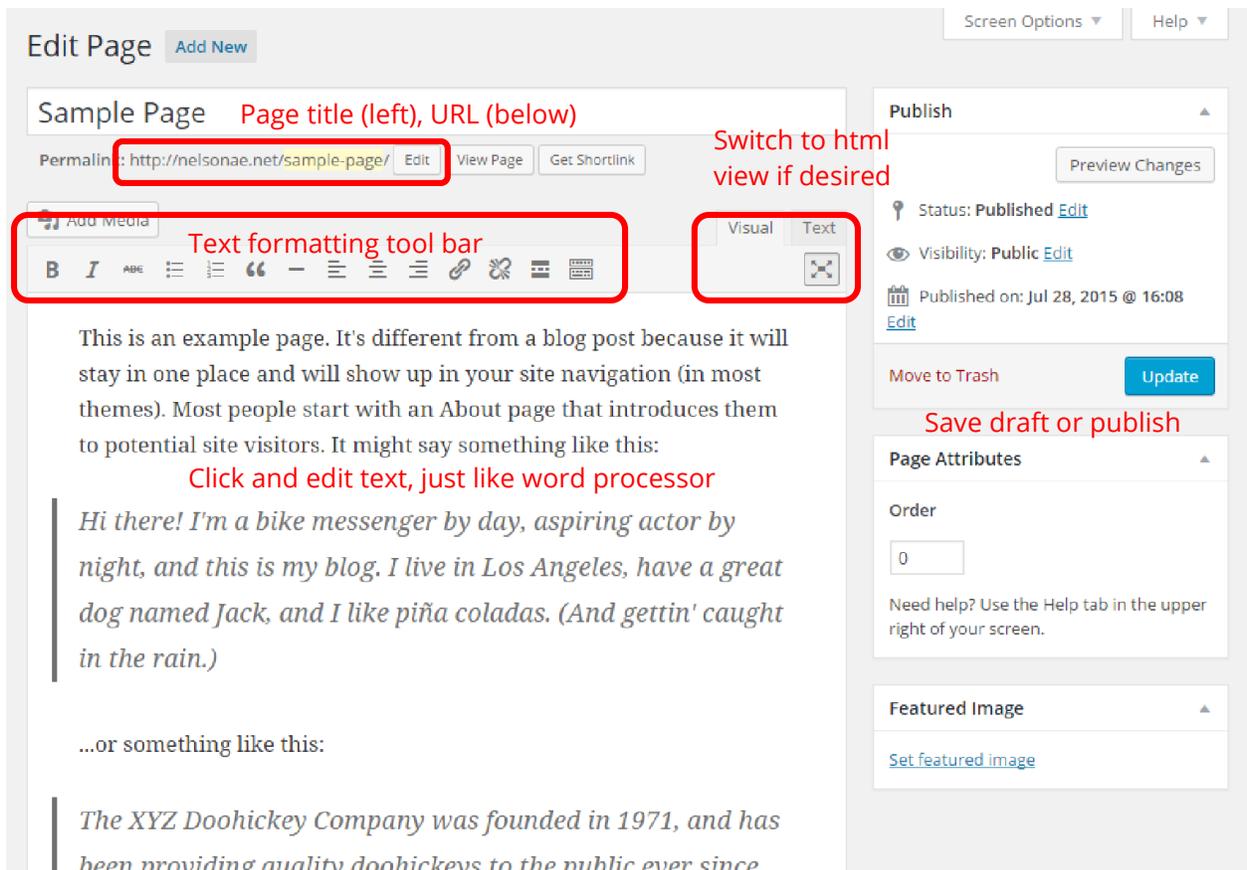
From the menu item, you will get a list of all the pages (or posts, or comments) that looks like this.



You scroll to the item you want, and when you roll over the title a submenu appears that lets you edit the page/post:



The editor has the following sections:



## Comments

If you allow comments on your site, they can be subject to review and approval (moderation) before they appear, or edited/deleted afterwards based on your preference and settings. If there are any awaiting reviews, they will be noted. Any comment can be reviewed and edited (if you have permissions).

**Comments to moderate**

The screenshot shows the WordPress dashboard's 'Comments' management interface. The left sidebar contains navigation links for Dashboard, Posts, Media, Pages, Comments (highlighted), Appearance, Plugins (1), Users, and Tools. The top navigation bar shows a '0' in a red box, indicating zero pending comments. The main content area is titled 'Comments' and includes filters for 'All', 'Pending (0)', 'Approved', 'Spam (0)', and 'Trash (0)'. Below the filters is a table with columns for 'Author', 'Comment', and 'In Re'. A single comment is listed from 'Mr WordPress' with the text 'Hi, this is a comment.' and a 'Hello' notification icon. A red text overlay on the right side of the table reads: 'Comment list, hover and click to edit same as pages'.

Last updated: August 4, 2015