

WordPress User guide

How To Update And Manage WordPress For A National Statistical Office's Website (to support website administrators)

Prepared by Statistics Canada

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Introduction

This document is a compilation of instructions and screen captures gathered from various sources from the Web. In this guide we will focus on basic tools that can be used for building and updating a simple website.

How to Login to a WordPress Site

To be able to work on the WordPress website, the administrator must create an account on your behalf. The administrator will assign a role with the specific permissions needed for your tasks. The system automatically sends an email to the new user with a temporary password.

First time user

You will receive an email from WordPress. The subject line by default will state “[] Your username and password info”

1. Click on the link in the body of the email which will bring you to the login page in WordPress.
2. You will be prompted to change your password.

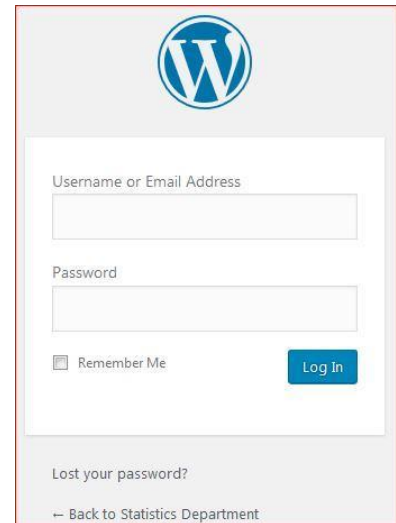


3. Click on **Save Password**. Your password has been updated! For security purposes, please select a **strong** and **unique** password. If you are worried about forgetting it, we highly recommend downloading a password manager such as “**Last Pass**” to keep track of all your passwords. See the [Security](#) section for more information.

Second time user

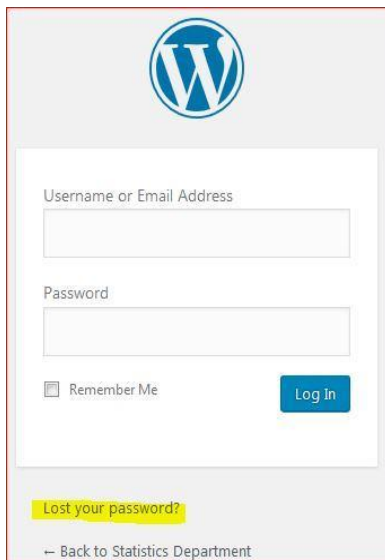
Your account has been created, the password has been modified and you have exited WordPress. Follow the steps below to get back into WordPress.

1. In a browser (Internet Explorer, Firefox, Chrome, iPad...), type in the website URL followed by “/wp-admin”. For example:
www.statsdemo.com/wp-admin
2. This will prompt you to insert your Username or Email Address and your Password.
3. Click on **Log In**.

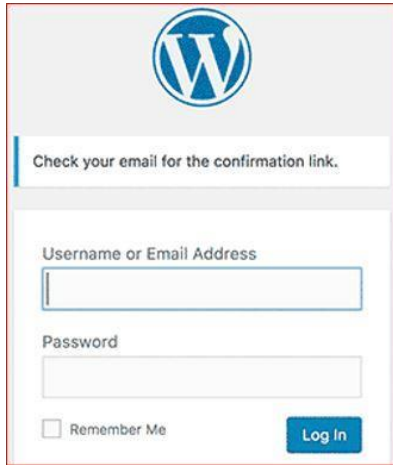


Lost your password

Have you forgotten your WordPress password and now want to recover the lost password?



1. Click on **Lost your password?** link. This will take you to another page where you will be asked to provide your WordPress username or email address.
2. Enter the username you use to log into your WordPress website. You can also provide the email address you have used during the installation or registration on your WordPress website. After entering the username or email address, click the **Get New Password** button.
3. Once you have entered a valid username or email address, WordPress will send an email to the email address associated with that account. It will also show you “**Check your e-mail for the confirmation link**” notification on the login screen.



4. Check your email inbox, there will be an email with the subject **[Your website Title] Password Reset**. Wait for a few minutes if you do not immediately see the email in your inbox. If you still do not see an email, then check your **Spam or Junk Mail** folder.

5. In the email, click the link listed below “To reset your password, visit the following address”. This link will take you back to your website and will allow you to enter a new password for your WordPress account.

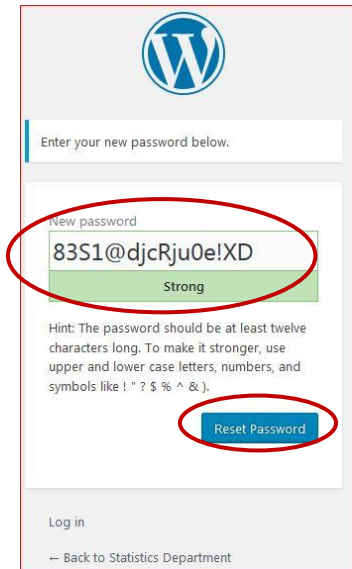
WordPress will automatically generate a strong password for you. You can change that to use

your own strong password. WordPress will let you set a weak password, but it is recommended that you choose a strong password.

A strong password is more than 12 characters long, contains both upper and lower case letters, with numbers, and special characters like: ! " ? \$ % ^ &.

6. Once you have entered a password, click **Reset Password**. You will see a notification “Your password has been reset. Log in”.

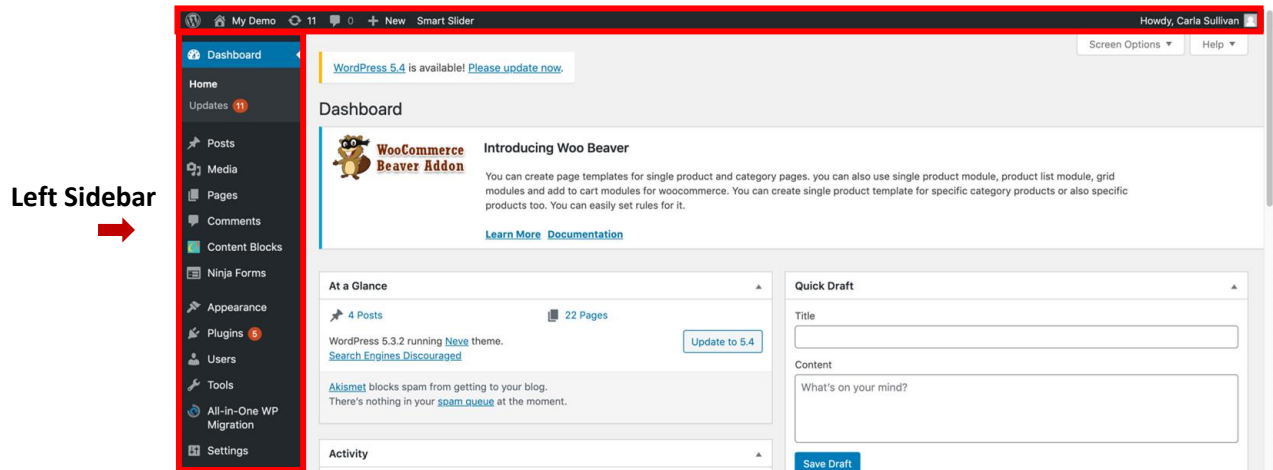
Congratulations, you have successfully reset your WordPress password. Click on “Login” link to sign into your WordPress blog using the new password.



WordPress Dashboard

The **Dashboard** is the first screen you see when you log into the administration area of your website. The dashboard gives you an overview of your site, access to your tools and plugins, and provides various updates. For the purpose of this manual, we will divide the dashboard into three areas: the **Admin Bar** and the **Left Sidebar**.

Admin Bar ↓

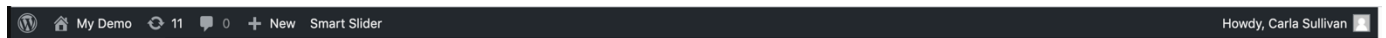


The Admin Bar

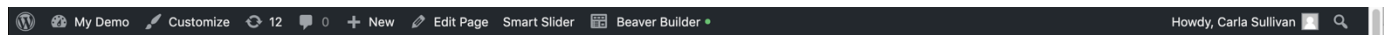
The **Admin Bar** is the dark gray menu bar that appears across the top of the dashboard. It also appears across the top of the site itself when you are logged in and navigating on the website -it is *not* visible to public visitors to the site.

The most useful feature of the Admin Bar is **switching between your dashboard and your website**.

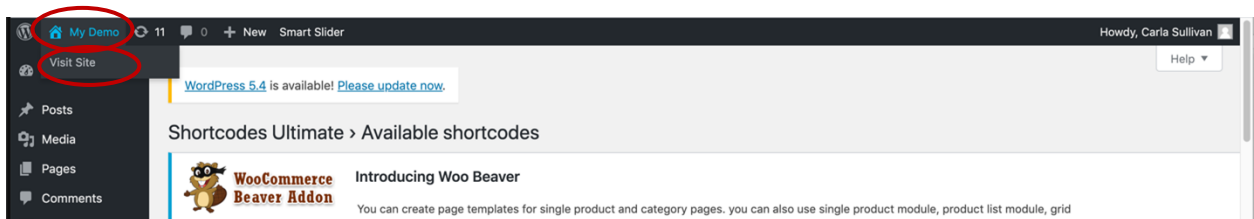
This is what the Admin Bar looks on the dashboard:



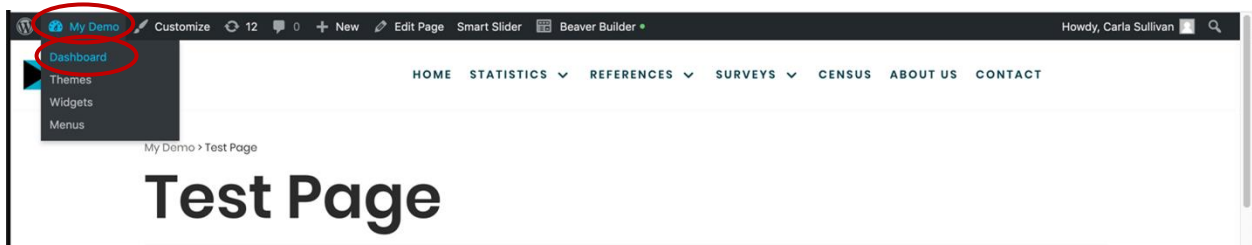
And this is what it looks like when you are on your site (from the administrator perspective):



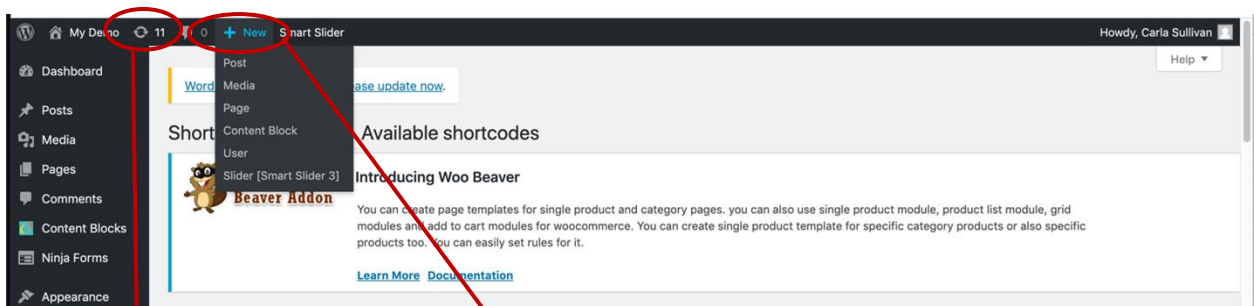
To access your site from your dashboard, mouse over **My Demo** and click **Visit Site**. “My Demo” is the title given to this particular site, but your site will have a different title, probably referring to your country and statistics. While working on your site, we recommend having two windows open, one for your dashboard and the other for you site so you can easily switch between the two.



To access your dashboard, from your website mouse over “My Demo” [your site name] and select **Dashboard**.



Here’s a breakdown of what you can access from the admin bar. Some of the features were added by installing and activating certain plugins such as **Smart Slider** and **Beaver Builder**. Here, we will just focus on the main built-in features relevant to your site.

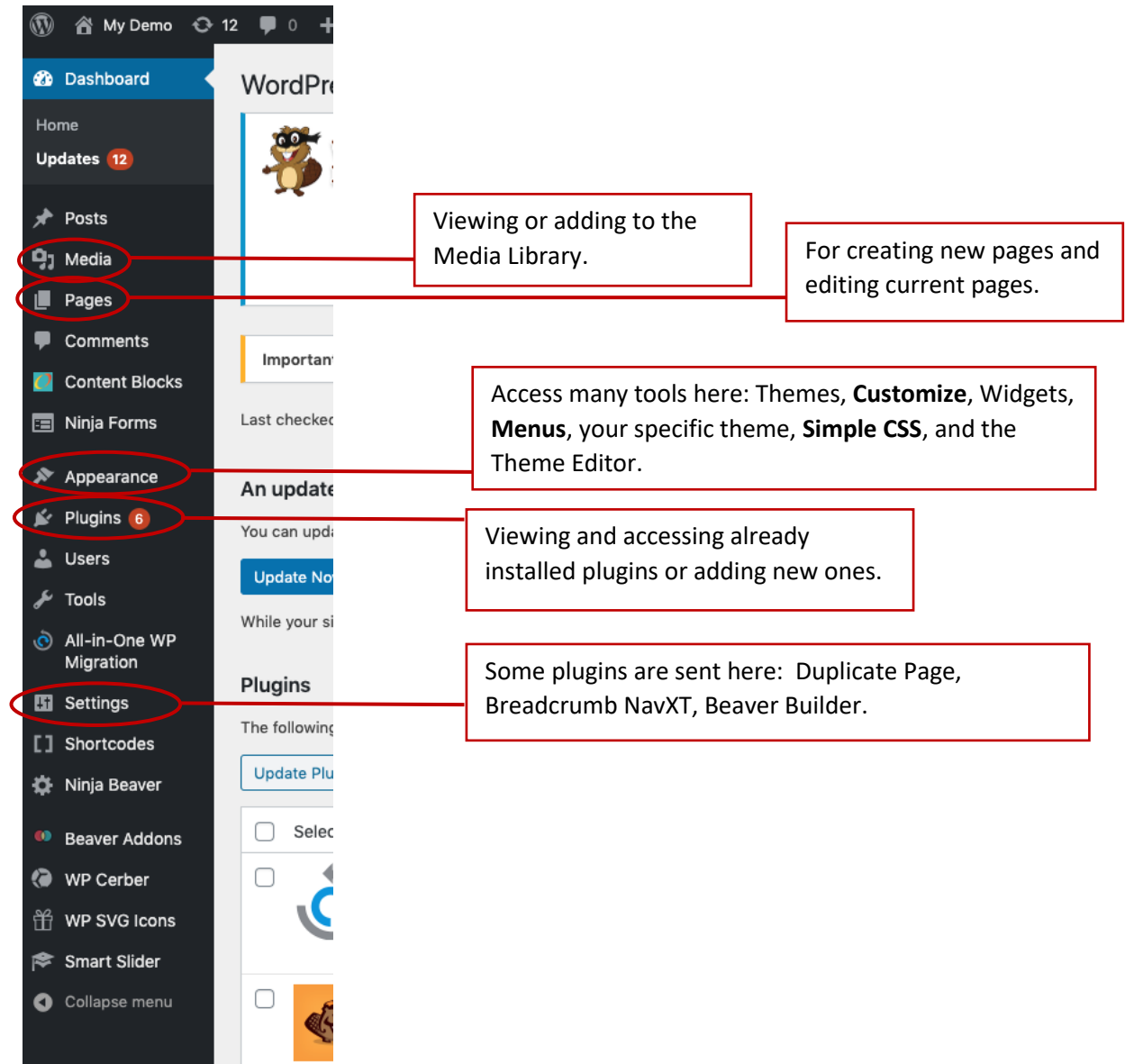


This number refers to how many updates you have available. If you click on this, you will be directed to page showing what all the updates are for. For security purposes, it is good to check on this frequently and make the update, particularly to your theme, plugins, and WordPress.

This gives you quick access to a few tools as well as some plugins you have installed and activated. These are also accessible on the **Left Sidebar**.

Left Sidebar

The **Left Sidebar** is where you can access the tools and plugins you need for building and managing your website. When you install and activate plugins, many of them are added to the Left Sidebar. Highlighted below are the more frequently used tools. Keep in mind, this example includes the already installed [core plugins](#). You will know more about plugins later on in this manual.



Roles and Capabilities

There are several roles in WordPress that each have their own limitations and permissions.

WordPress uses a concept of **Roles**, designed to give the site owner the ability to control what users can and cannot do within the site. A site owner can manage the user access to such tasks as writing and editing posts, creating Pages, defining links, creating categories, moderating comments, managing plugins, managing themes, and managing other users, by assigning a specific role to each of the users.

- **Administrator:** has access to all the administration features within a single site.
- **Editor:** can publish and manage posts including the posts of other users.

- **Author:** can publish and manage their own posts.
- **Contributor:** can write and manage their own posts but cannot publish them.
- **Subscriber:** can only manage their profile.

Upon installing WordPress, an Administrator account is automatically created.

The default role for new users can be set in *Administration Panels > Settings > General*.

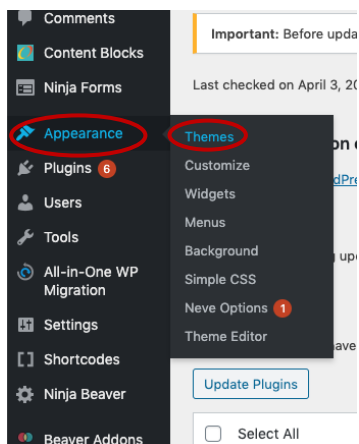
Choose a theme

Installing a WordPress theme is easy. But keep in mind that if you activate a new theme, then it will change how your website looks and functions. One theme we recommend is **Customify**, it is easy to use with lots of customization options (as the name suggests!).

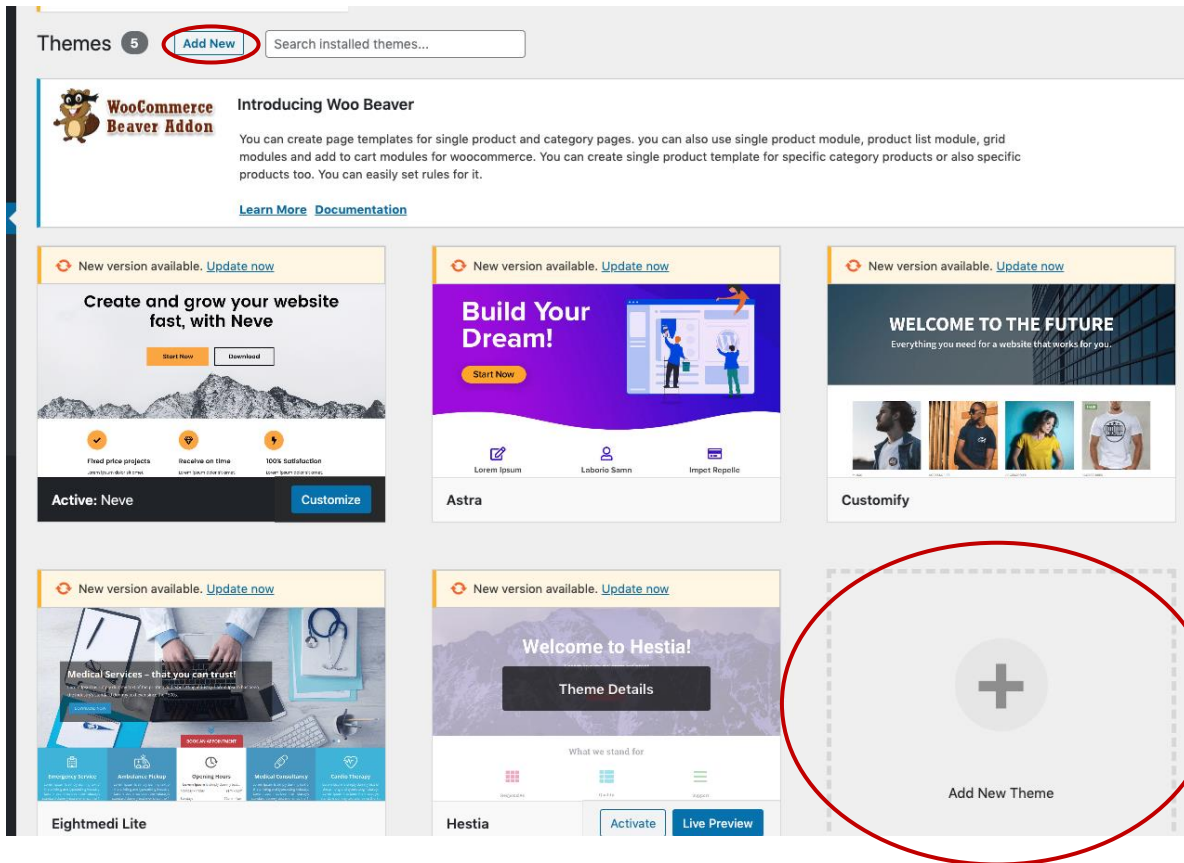
Install a Theme using WordPress Admin Theme Search

If you're looking to install a free WordPress theme from the [WordPress Theme Directory](#), then the easiest way is by using the WordPress admin theme search functionality.

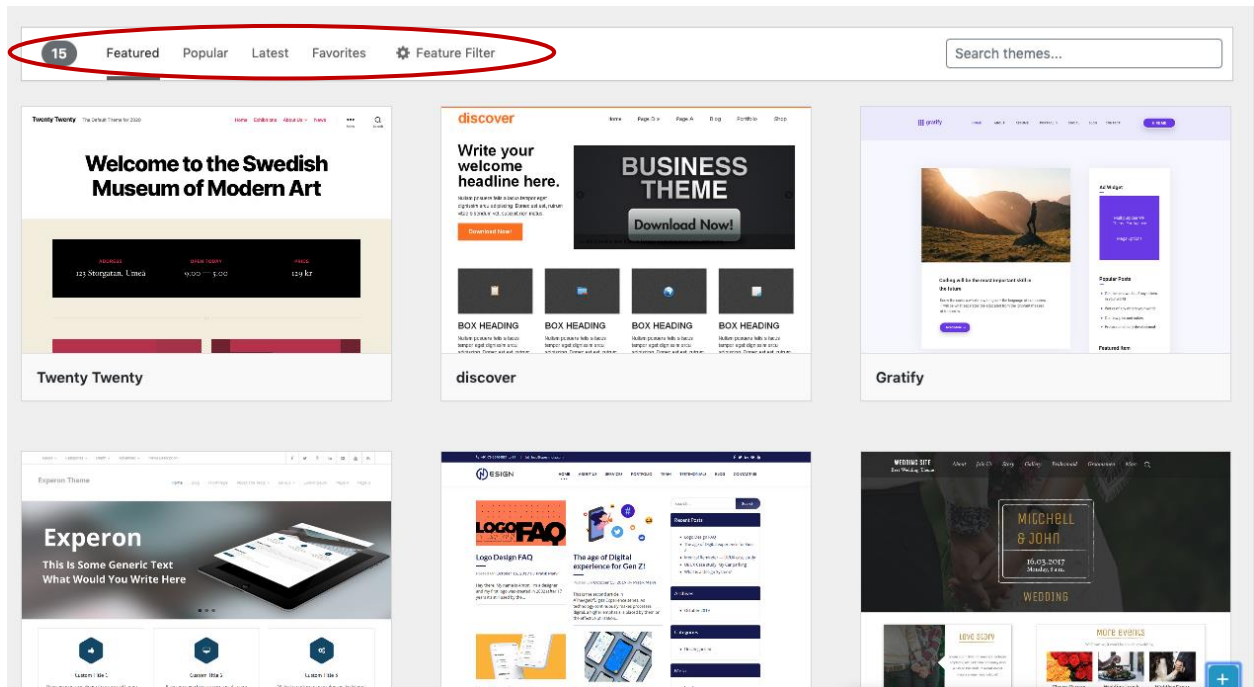
1. On your Dashboard, mouse over **Appearance** in the Left Sidebar and select **Themes**.



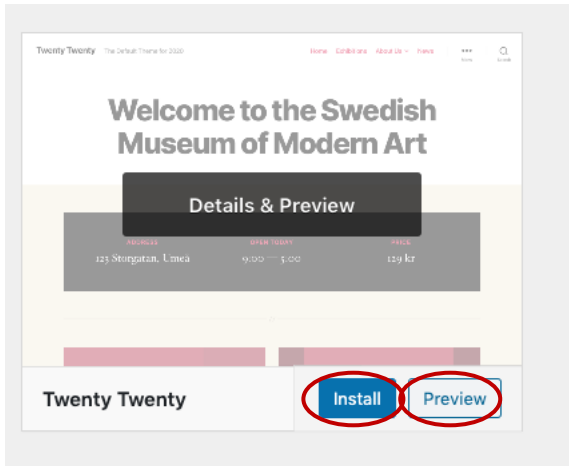
2. On the Themes page, click Add New (either one).



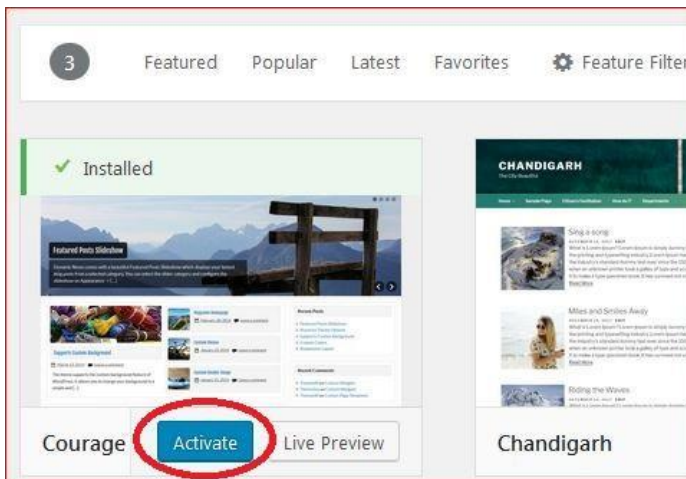
3. You can start browsing the different themes. The tabs offer some options to filter/narrow down your search.



4. If you mouseover a theme, it will give you the option to **Preview** it. Once you have selected your theme, mouseover it and click **Install**.



5. Click **Activate**.



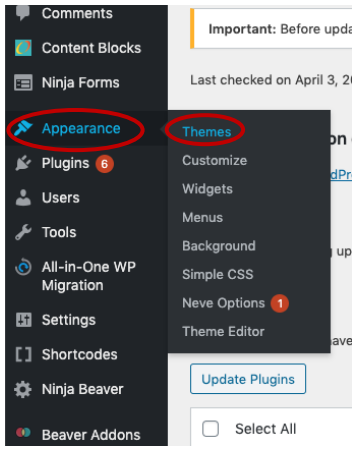
You have successfully installed and activated your WordPress theme.

Note: Depending on the theme, it may add additional settings options that you may need to configure either through the theme customizer or through a separate options panel.

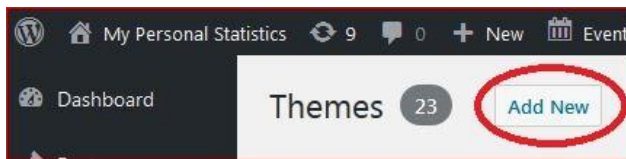
Install a Theme by using Upload Method

If you want to install a custom theme, or a commercial “premium” WordPress theme from companies like [ThemeLab](#), [StudioPress](#), [iThemes](#), etc., you will need to install it using the upload method from your WordPress admin.

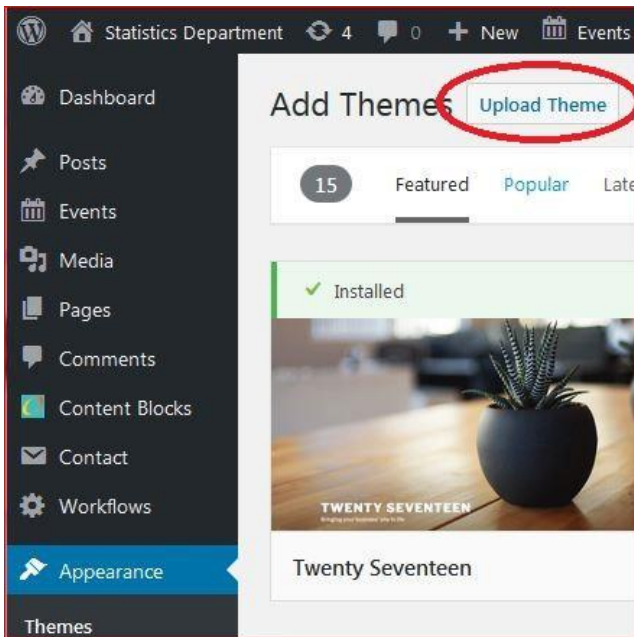
1. Start by downloading the .zip file of the theme that you purchased from a marketplace or a commercial theme provider.
2. From your Dashboard, mouse over **Appearance** and select **Themes**.



3. On the themes page, click on the **Add New** button at the top.

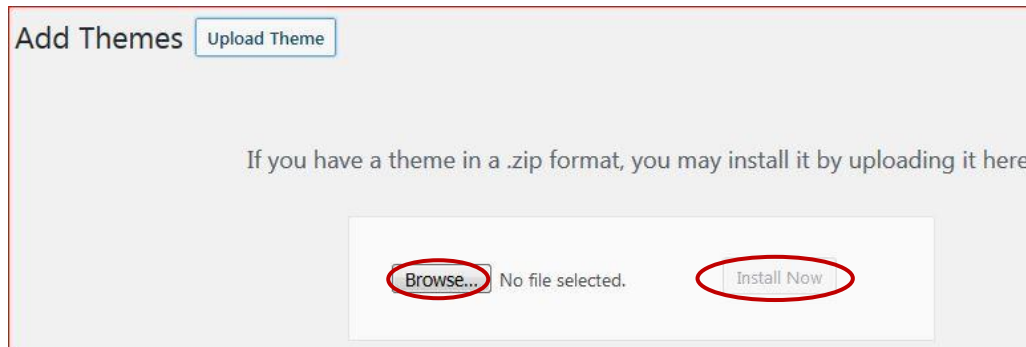


4. Click the **Upload Theme** button at the top.

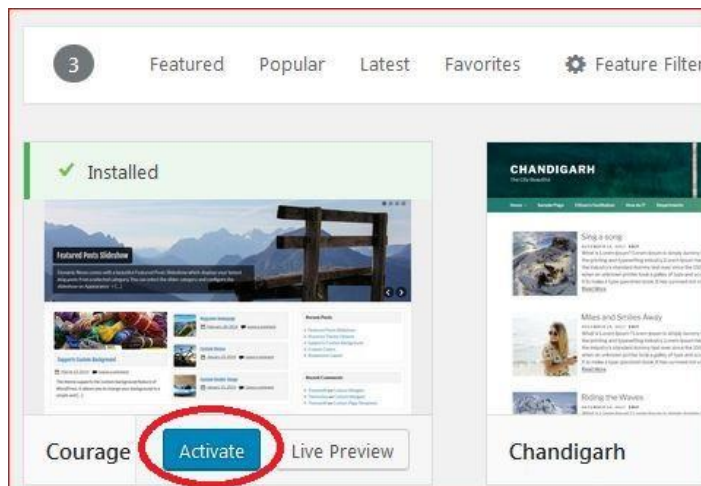


- 5.

5. You will be prompted to choose the zip file that you downloaded earlier. Select the file (from **Browse**) and click **Install Now**.



6. Once your theme is installed, you will see a success message along with the link to activate and preview the theme. Click **Activate**.

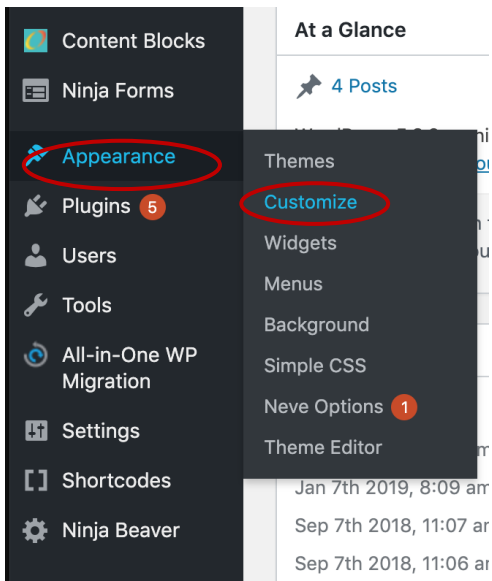


You have successfully installed and activated your WordPress theme. Depending on the theme, it may add additional settings options that you may need to configure either through the theme customizer or through a separate options panel.

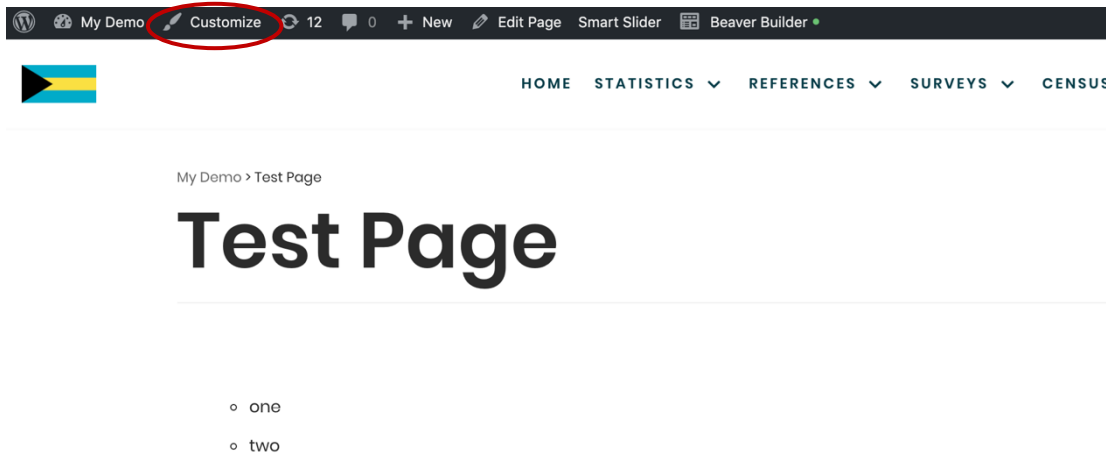
Note: The theme upload functionality is only available for self-hosted WordPress.org users. If you're using WordPress.com, then you will not see this option because it limits you. In order to use custom theme upload feature, you would need to use self-hosted WordPress.org (See this article that explains ["Self Hosted"](#)). If you want to switch from WordPress.com to WordPress.org, then check out this [tutorial](#).

Customize your Theme

With your theme now installed, you can begin customizing it. To customize your theme, you will use the **Customizer**. To access the **Customizer** from the Dashboard, mouse over **Appearance** and select **Customize**.



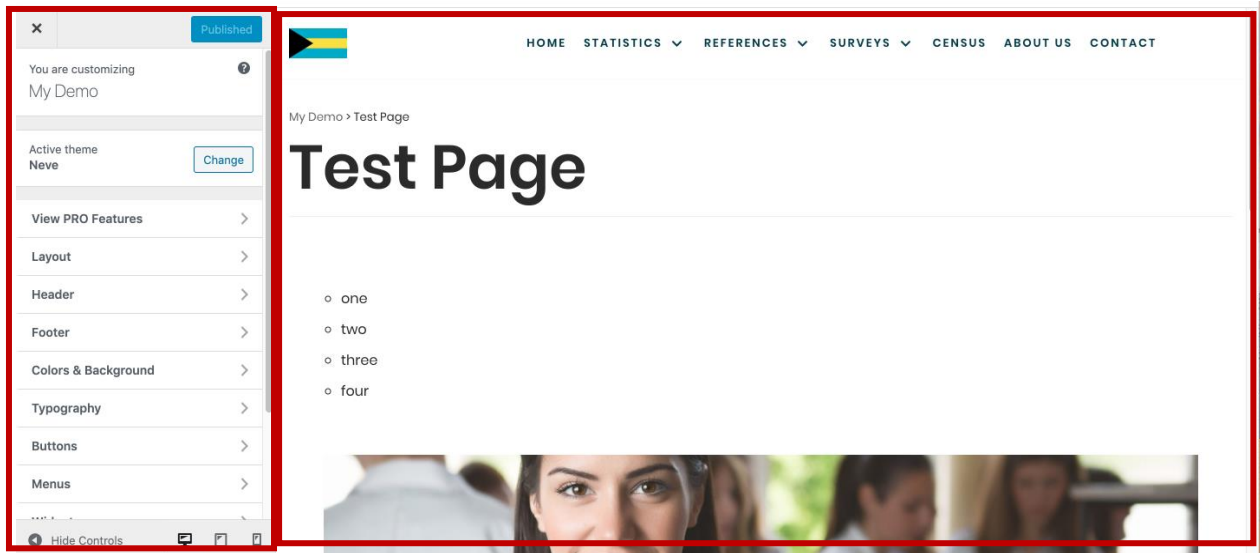
To access the **Customizer** from your site, click **Customize** in the **Admin Bar**.



Customization options



Preview



While this tool will look different from theme to theme, the layout is generally the same. Your WordPress **customization options** will be on the left and the **preview** on the right. Below is a quick overview of the menu and some of the customization modules available. We recommend exploring all the different options and playing around with the settings. You can always come back and make changes as you go along.

For information on the different customization modules (i.e., how to use the different options in the menu), check out this [article](#).

Note: If you are using a free theme, you will not have access to the “Pro” features; those you must pay for.

Plugins

A plugin is a piece of third-party software containing a group of functions that can be added to a WordPress website. They can extend functionality or add new features to your WordPress websites. Plugins allow you to add new features to WordPress such as add a gallery, slideshow, etc. However, there is such a thing as too many plugins. The more plugins you have, the slower your site, the higher the risk of security breaches/getting hacked, and the increased chance of crashing your site (i.e. the code from one plugin clashing with that of another plugin).

When researching a plugin, make sure to: look at how many people have downloaded, what kind of reviews it gets, which version of WordPress it's compatible with, and how recent its last update was. If

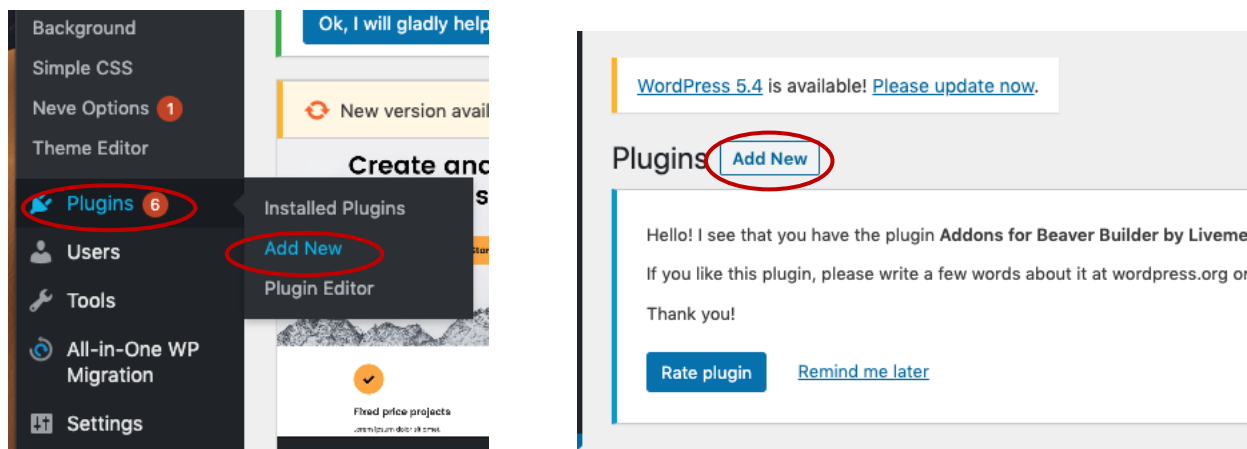
its last update was 2 years ago, it could be that a) the plugin is very basic and requires little to no maintenance (though this rare) or b) the developers are no longer maintaining it and could therefore be a security risk.

Premium, or paid plugins, will almost always be more secure than a free plugin.

Install a Plugin

To explain how you install a plugin, we will use the example of the **Short Codes Ultimate** plugin. The steps will be applicable for most of the plugins.

1. From the Dashboard you can either, **a)** mouse over **Plugins** in the Left Sidebar and select **Add New** or, **b)** click **Plugins** and then click the **Add New** button on the page.




2. In the search box to the right, type in either the name of the plugin (if you know it) or a keyword.

Featured Popular Recommended Favorites

Keyword

Plugins extend and expand the functionality of WordPress. You may automatically install plugins from the [WordPress Plugin Directory](#) or upload a plugin in .zip format by clicking the button at the top of this page.




Akismet Anti-Spam Active

Akismet checks your comments and contact form submissions against our global database of spam to protect you and your site from malicious content.

By Automattic

★★★★★ (866) Last Updated: 3 weeks ago

5+ Million Active Installations ✓ Compatible with your version of WordPress




Classic Editor Active

Enables the previous "classic" editor and the old-style Edit Post screen with TinyMCE, Meta Boxes, etc. Supports all plugins that extend thi ...

By WordPress Contributors

★★★★★ (800) Last Updated: 5 months ago

5+ Million Active Installations ✓ Compatible with your version of WordPress




Jetpack by WordPress.com Install Now

The ideal plugin for stats, related posts, search engine optimization, social sharing, protection, backups, security,...

By Automattic

★★★★★ (1,474) Last Updated: 1 month ago



bbPress Install Now

bbPress is forum software for WordPress.

By The bbPress Contributors


★★★★★ (305) Last Updated: 2 months ago

3. Locate the desired plugin and click **Install Now**.

Search Results Featured Popular Recommended Favorites

Keyword

9,000 items << < 1 of 250 > >>




WordPress Shortcodes Plugin — Shortcodes Ultimate Install Now

A comprehensive collection of visual components for your site

By Vladimir Anokhin

★★★★★ (5,243) Last Updated: 3 weeks ago

800,000+ Active Installations ✓ Compatible with your version of WordPress




The Events Calendar Shortcode & Block Install Now

Adds shortcode and block functionality to The Events Calendar Plugin (free version) by Modern Tribe, so you can easily list your events anywhere.

By Event Calendar Newsletter

★★★★★ (51) Last Updated: 6 days ago

20,000+ Active Installations ✓ Compatible with your version of WordPress




WooCommerce Shortcodes Install Now

Adds a button in TinyMCE editor allowing use of WooCommerce shortcodes. Beautifully.

By WooThemes, Claudio Sanches

★★★★★ (5) Last Updated: 6 months ago




Meks Flexible Shortcodes Install Now

Add some cool elements to your post/page content with flexible shortcodes.

By Meks

★★★★★ (7) Last Updated: 3 weeks ago

4. Once installed, click **Activate**.



WordPress Shortcodes Plugin — Shortcodes Ultimate Activate

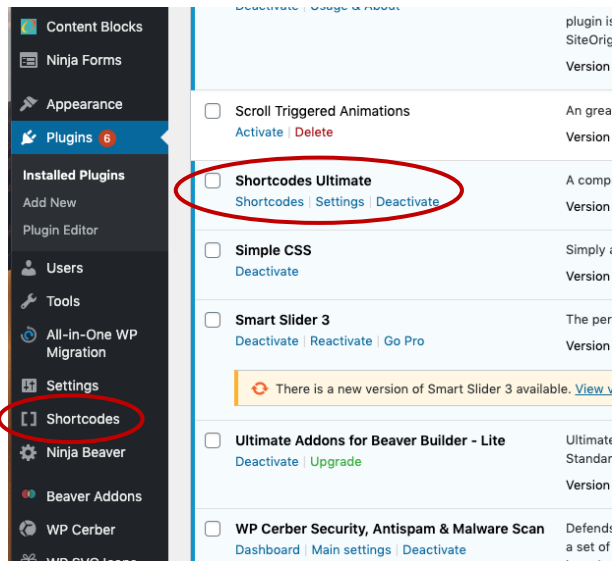
A comprehensive collection of visual components for your site

By Vladimir Anokhin

★★★★★ (5,243) Last Updated: 3 weeks ago

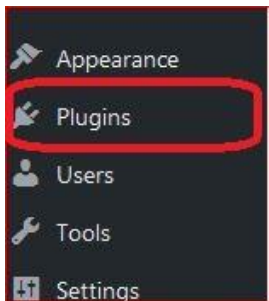
800,000+ Active Installations ✓ Compatible with your version of WordPress

5. Once activated, you will be brought to the **Plugins** page. You can now see the **Short Codes Ultimate** plugin in the list. You should also be able to locate it in the Left Sidebar (as just **Short Codes**).



Delete a Plugin

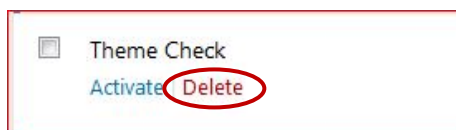
1. In the Left Sidebar of the Dashboard, click on **Plugins**.



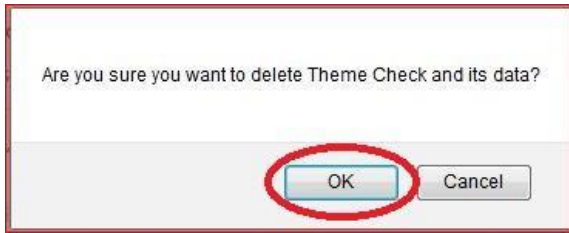
2. Mouse over the plug you would like to delete and select Deactivate.



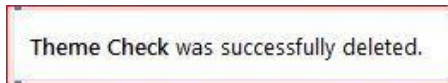
3. The links below the plugin's title will now display "Activate" and "Delete". Click on **Delete**.



4. A pop-up window will appear and ask you to confirm your action, click on **Ok**.



5. A message will replace the plugin's previous location, confirming that the plugin has been deleted.

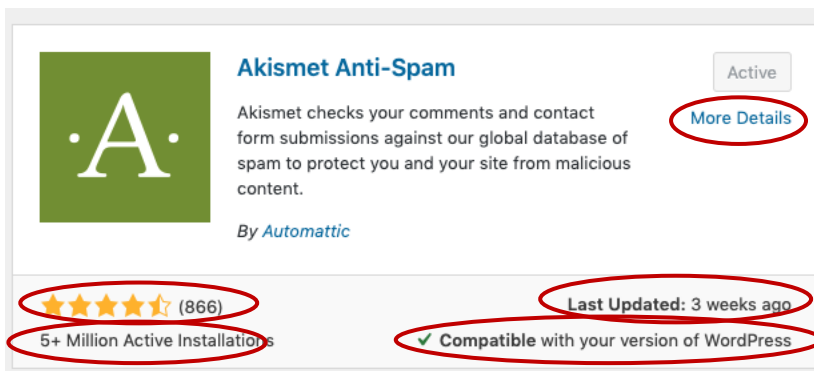


Searching for and Selecting Plugins

Because the vast majority of plugins are free, it is important to note that they usually do not come with tech support. For this reason, it is important to be careful when choosing which plugin, you want to install on your site. Although there are plugins that can do virtually anything, some are much higher quality than others.

In order to choose the right plugin, look for and assess the following information (in no order):

- Last Updated
- Compatible with your version of WordPress (if not, do not use)
- Information given under **More Details** (are there good FAQs?)
- Rating
- Number of Active Installations



The **Askimet Anti-Spam** plugin is an example of a very good plugin to install.

Core Plugins

To meet the basic requirements for your site, you should consider installing the following plugins:

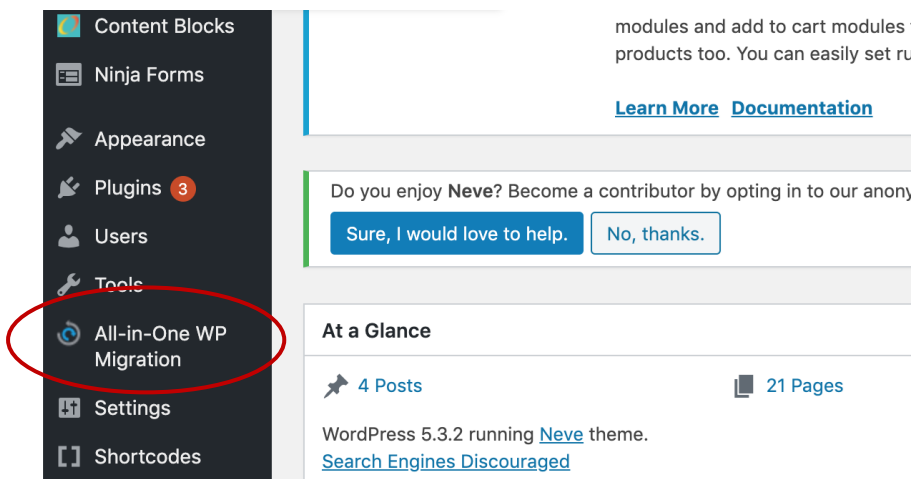
- All-in-One WP Migration
- Beaver Builder (Pro)
- Breadcrumb NavXT (if a breadcrumb does not come with your theme)
- Duplicate Page
- Ninja Forms
- Reusable Content & Text Blocks by Loomisoft
- Shortcodes Ultimate
- Simple CSS
- Smart Slider 3
- Last Modified Timestamp
- YOAST Seo
- Analytify (Google Analytics)

We have tested these plugins and highly recommend you install and use them. Due to the nature of plugins however, they're not always easy to find in your dashboard. Thus, once you have installed and activated each one, check the information below for details on **how to locate them in your dashboard and a basic description their specific function.**

All-in-One WP Migration

Use: This is your website back-up plugin. Use this plugin to download a copy of your entire site every week. For instructions, go to [Backups](#).

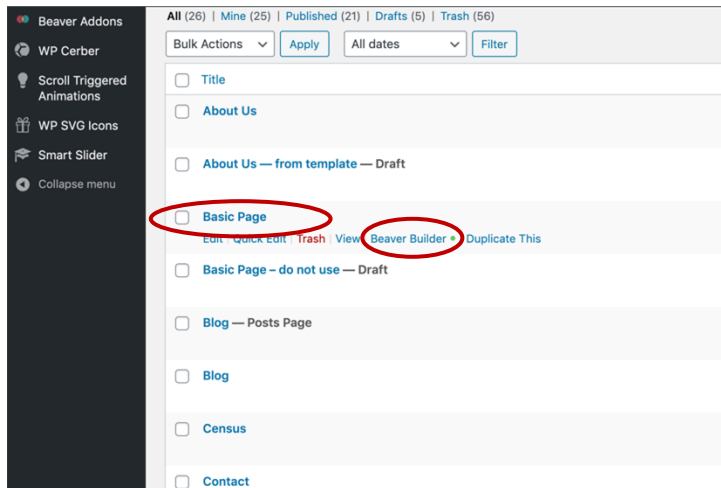
Location: Left Sidebar of the dashboard.



Beaver Builder

Use: Create and edit pages using drag and drop modules.

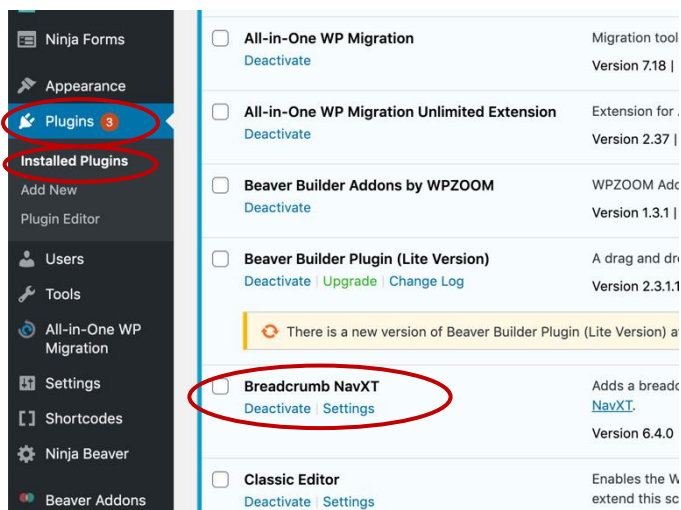
Location: Access this when you are creating and/or editing a page. Go to **Pages > All Pages** and mouse over the page you would like to edit and click **Beaver Builder**. For instructions on how to use **Beaver Builder**, go to [Building and Editing a Page](#).



Breadcrumb NavXT

Use: Gives your website a breadcrumb if your theme doesn't already come with it. This plugin is different because it is not accessible in the menu, rather it works in the back-end of your site once you have integrated it into your theme. Follow the instructions in [Install the Breadcrumb](#) to integrate it to your theme. Breadcrumbs help your user navigate your website and are also essential for Search Engine Optimization (SEO).

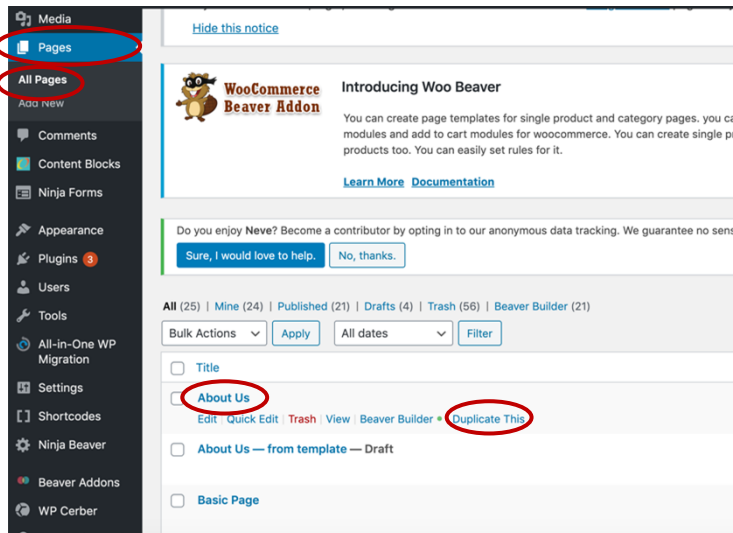
Location: The **Installed Plugins** page.



Duplicate Page

Use: To create a copy of a page you have already created. This feature can save you time as you can duplicate a page you already made with the basic styling you want and change the content.

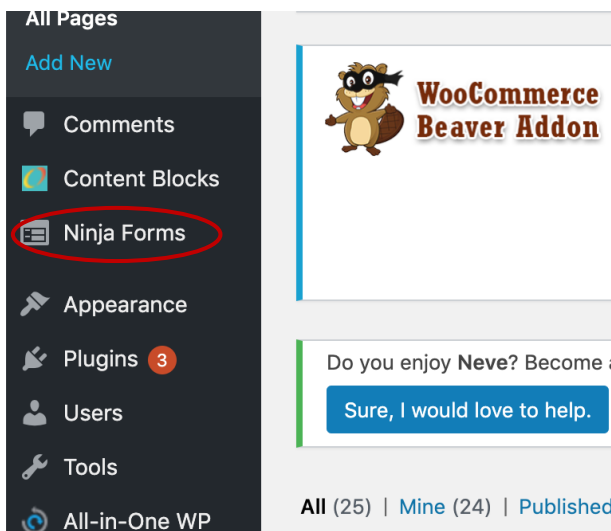
Location: Under each page on the **All Pages** page when you mouse over the specific page you want to duplicate.



Ninja Forms

Use: To build forms, specifically the **Contact** and the **Request Data** forms.

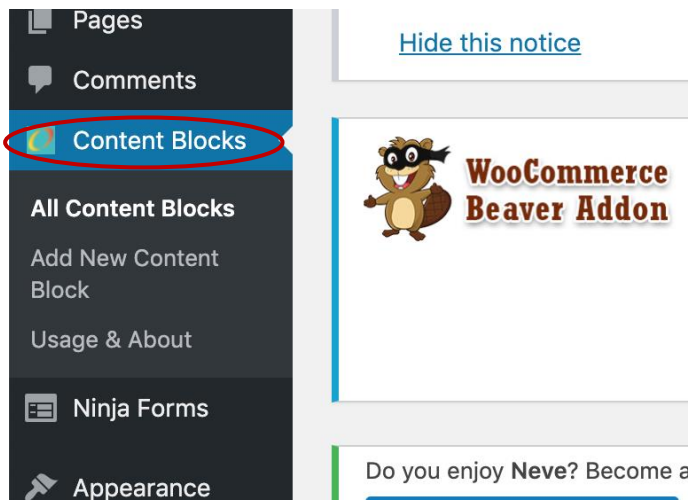
Location: Left Sidebar.



Reusable Content & Text Blocks by Loomisoft

Use: To display content on various areas of your site using shortcode. This is particularly useful for making accordions to organize and display your data. To make content blocks, go to [Create and Add a Content Block](#).

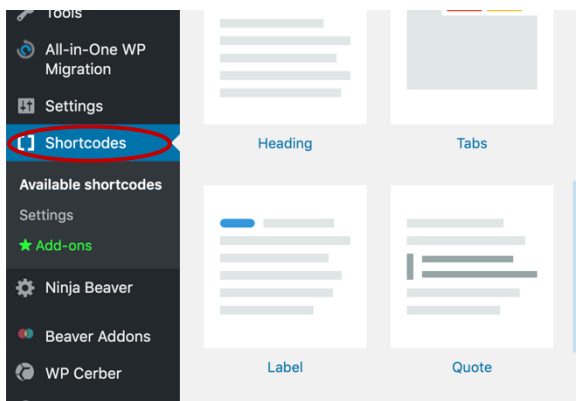
Location: In the Left Sidebar under the name **Content Blocks**.



Shortcodes Ultimate

Use: This lets you create visual and functional elements on your page. Select what you want to make from their list, e.g., tabs, accordions, boxes, columns, etc.

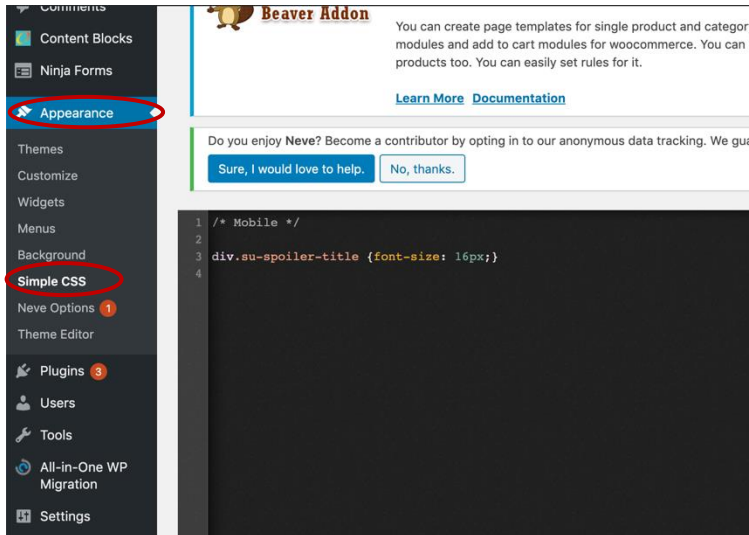
Location: In the Left Sidebar under the name **Short Codes**.



Simple CSS

Use: Style/customize html elements on your page using Cascading Style Sheets. Instructions on how to add CSS are found in [Adding CSS](#).

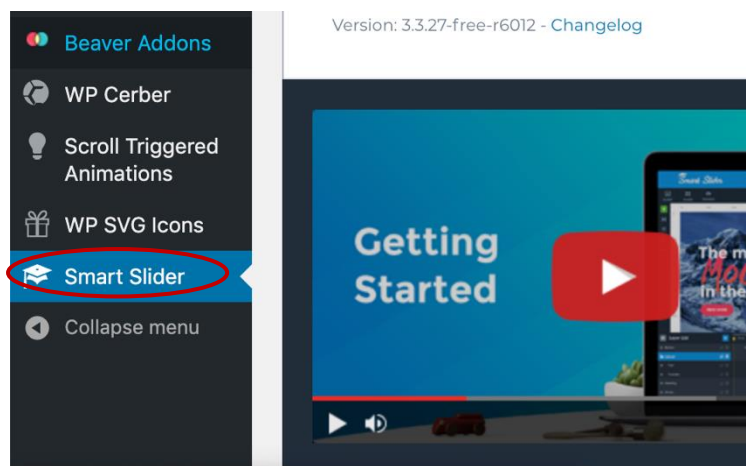
Location: In the Left Sidebar > **Appearance** > **Simple CSS**.



Smart Slider 3

Use: Show a series of images one at a time, each automatically advancing horizontally. Check out [Create and Add a Slider](#) for instructions.

Location: There are two locations, in the **Admin Bar** and the **Left Sidebar**.



Last Modified Timestamp

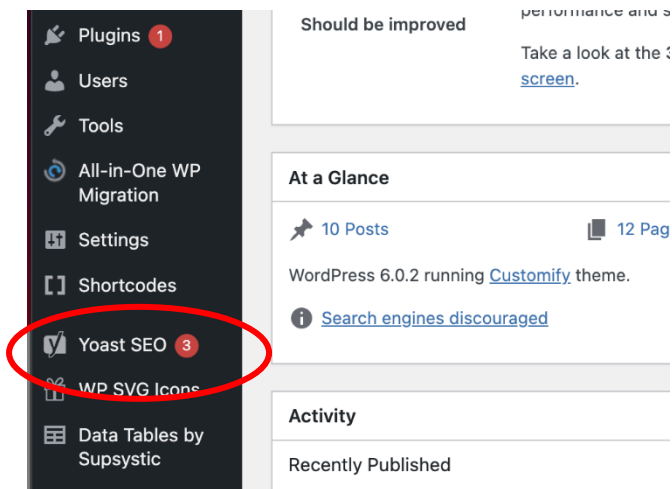
Use: Shows users when (date) each page/post of the website was last modified. This plugin is different because you cannot access it from the menu, but rather it works in the back-end of your site once you have integrated it to your theme.

Location: The **Installed Plugins** page.

Yoast SEO

Use: Improves your website's rankings on search engines by helping you optimize your site's content and keywords.

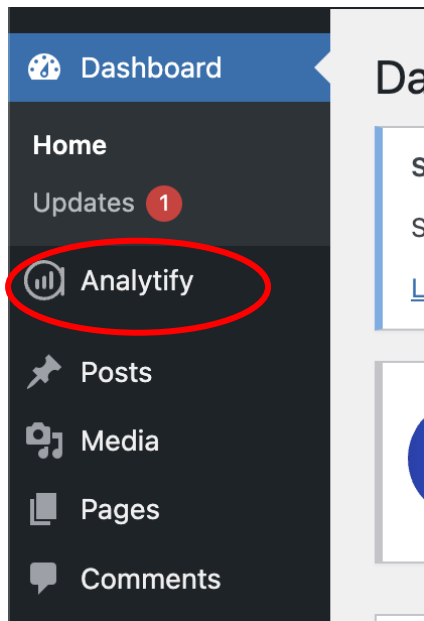
Location: **Left Sidebar.**



Analytify (Google Analytics)

Use: Provides a dashboard to display your Google Analytics, which tracks your website analytics. You must have a Google Analytics account set up for your site.

Location: **Left Sidebar.**



Install NavXT (Breadcrumb)

Many themes don't come with a breadcrumb, so you must install and activate the plugin, and then follow these instructions in order to integrate to your theme.

Before you start, make sure you have Breadcrumb NavXT installed and activated.

1. On the Plugins page, locate **Breadcrumb NavXT** and click **Edit**.



2. This brings you to the components specific to this plugin. On the right, you will see a list of files (php, js, css and txt). The one you are looking for is the **".../readme.txt"**, click it. This is where you'll get the information on how to install it and where to do it. The content window to the left will display the information from this file.

Plugin Files

breadcrumb-
navxt/breadcrumb-
navxt.php

breadcrumb-
navxt/uninstall.php

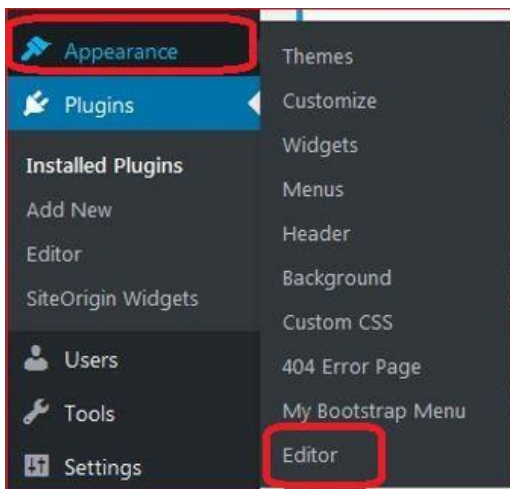
breadcrumb-
navxt/class.bcn_network_admin.php

breadcrumb-navxt/readme.txt

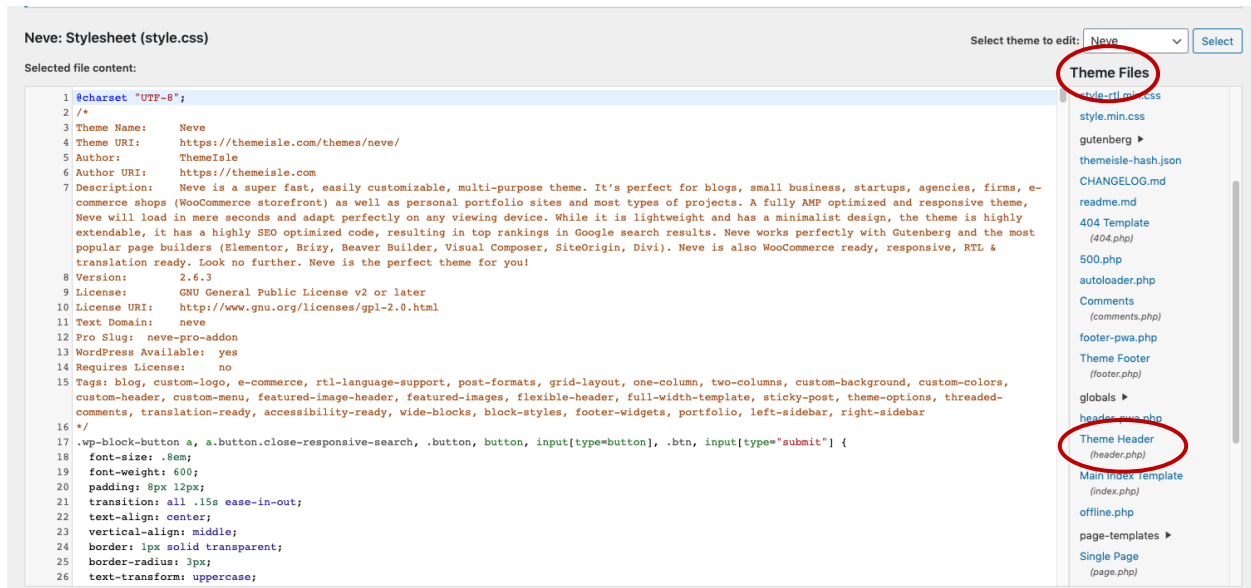
3. Look for the section with the heading “**Installation**”, read the instructions which will tell you what to copy and where to paste it. In this case, it tells us to paste the codes in the file “**header.php**”. Copy the codes below starting with “<div” and ending with “</div>”.

```
== Installation ==
Open the appropriate file for your theme (typically header.php). This can be done
within WordPress' administration panel through Presentation > Theme Editor or
through your favorite text editor. Place the following code where you want the
breadcrumb trail to appear.
`<div class="breadcrumbs" typeof="BreadcrumbList" vocab="https://schema.org/">
  <?php if(function_exists('bcn_display'))
  {
    bcn_display();
  }?>
</div>`
Save the file (upload if applicable). Now you should have a breadcrumb trail on
your WordPress powered site. To customize the breadcrumb trail you may edit the
default values for the options in the administrative interface. This is located in
your administration panel under Settings > Breadcrumb NavXT.
```

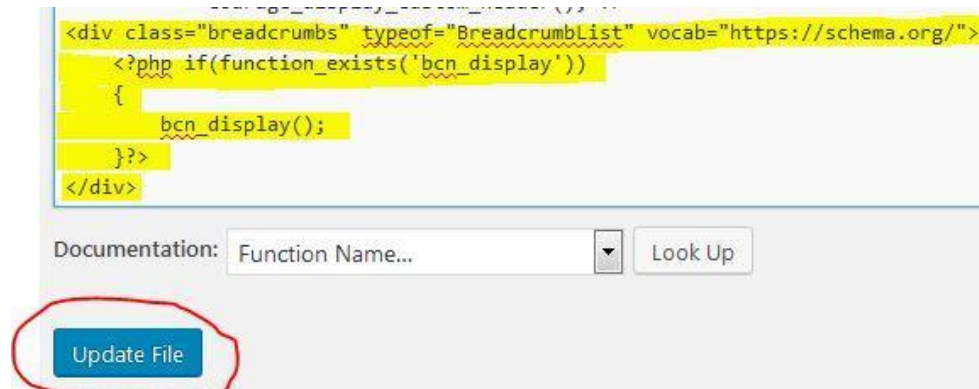
4. To access “**header.php**”, mouse over **Appearance** in the Left Sidebar and select **Editor** or **Theme Editor**.



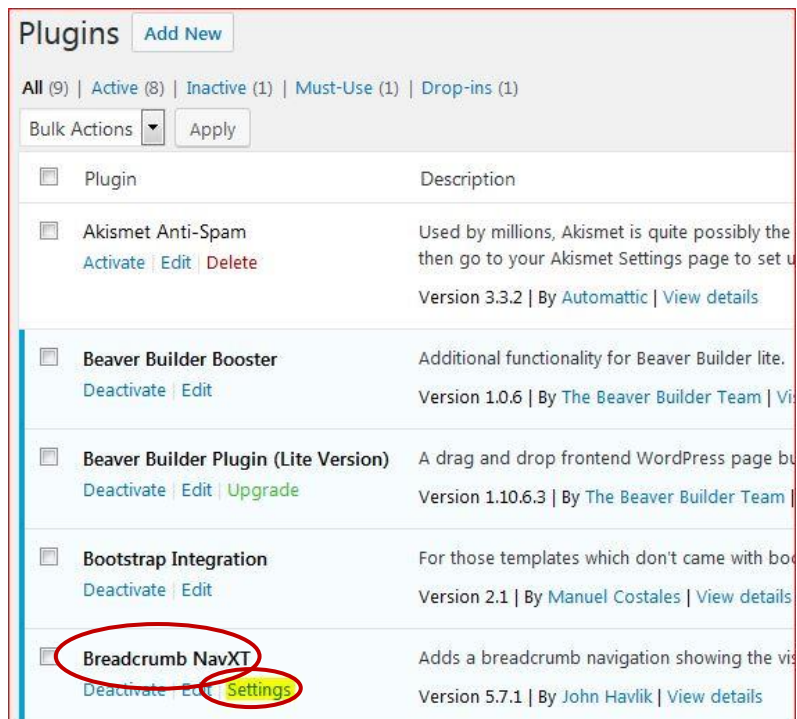
5. On the right under Theme Files, click on **Theme header (header.php)**, you may have to scroll down a bit.



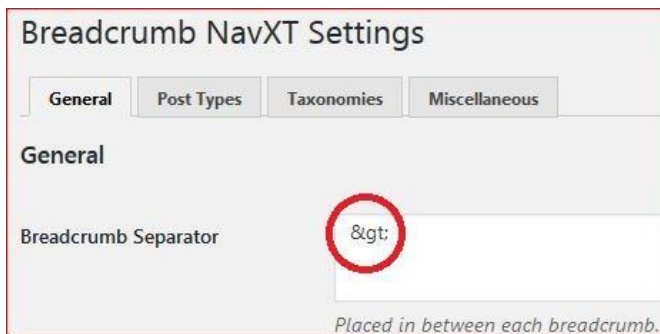
6. Once the **header.php** file is open in the editor, go through the codes and go where it should go, in this case to the very end. Click after the last code, then paste it there. Once it's done, click **Update File**.



7. Now that the breadcrumb is activated, installed, and adapted to your theme, go to your homepage and you will notice the breadcrumb. By default, the plugin puts the title of the site as the "Home" in the breadcrumb.
8. To put "Home" instead of the title of the site in the breadcrumb, go back to the **Dashboard** and on the Left Sidebar click **Plugins**. Below the **Breadcrumb NAVXT** plugin, click **Settings**.



9. This page gives you the opportunity to customize the way the breadcrumb is displayed. The top part shows that by default, breadcrumb items are separated by a greater-than sign ">". We will leave it as is.



10. Below, simply replace the code highlighted in yellow with the "static" word "Home".



Home Breadcrumb

Home Breadcrumb

Place the home breadcrumb in the trail.

Home Template

```
<span property="itemListElement" typeof="ListItem"><a
property="item" typeof="WebPage" title="Go to %title%."
href="%link%" class="%type%"><span property="name">Home</span>
</a><meta property="position" content="%position%"></span>
```

11. In most cases, you don't need nor want any breadcrumb on your homepage / index page. The easiest way to do it is to apply the "invisible" class in the window below.

Home Template (Unlinked)

```
<span property="itemListElement" typeof="ListItem"><span
property="name">%htitle%</span><meta property="position"
content="%position%"></span>
```

The template for the home breadcrumb, used when the breadcrumb is not linked.

Home Template (Unlinked)

```
<span property="itemListElement" typeof="ListItem"
class="invisible"><span property="name">%htitle%</span><meta
property="position" content="%position%"></span>
```

The template for the home breadcrumb, used when the breadcrumb is not linked.

12. To implement the change, go to the bottom of the page and click "Save Changes". Now, if you go back to the browser and refresh your page, you will notice that the breadcrumb now starts with "Home".

13. If you click on a page, you will see that the breadcrumb contains "Home", and the items are separated by a greater-than sign.

Home > Subjects > Economic accounts

By default, the page you are in is part of the breadcrumb, but it is not linked.

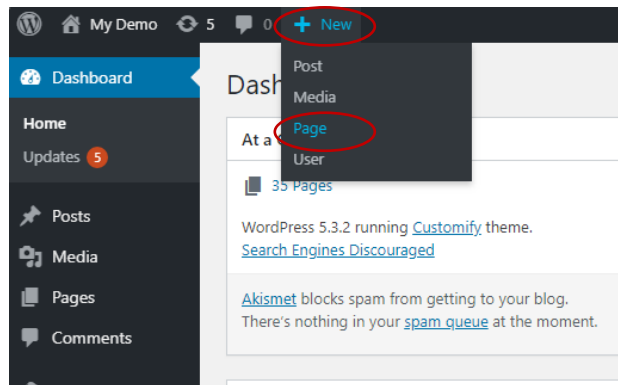
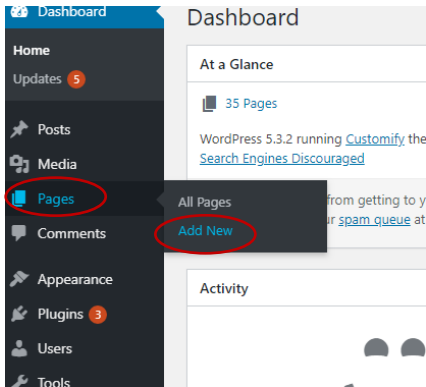
Create a Page

Note: Barbados, please skip this section and follow instructions in [Create a Page – Barbados](#).

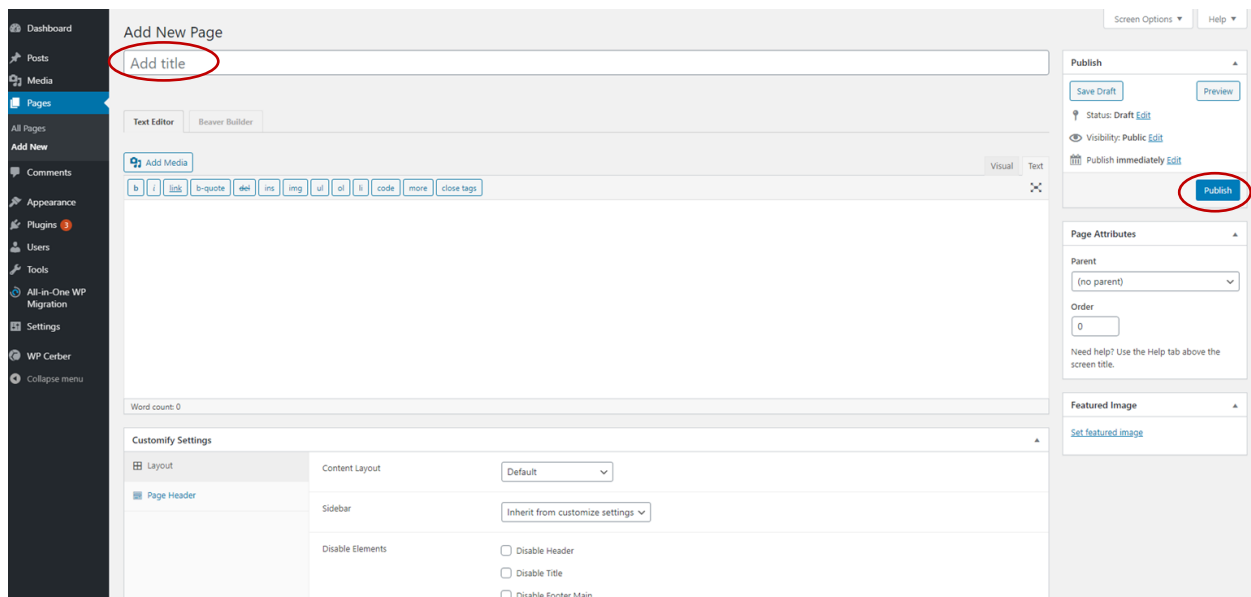
Although WordPress has different types of inputs, we will be using **Pages** to structure our site. Before creating any pages however, you must first install and activate the “**Beaver Builder**” plugin.

Many themes come with a few ready-built pages such as “Home”, “About Us” and “Contact Us”; feel free to use them! To access them, go to **Pages** > **All Pages** in the Left Sidebar of the Dashboard. If you would like to use and edit these, follow the instructions in [Building and Editing a page](#).

1. Now that **Beaver Builder** is installed, you can either click (or mouse over) “**Pages**” > “**Add New**” in the left sidebar or click on “**+ New**” > “**Page**” in the admin bar of the dashboard to add a new page.



2. Give the page a title and click **Publish**.



You now have a page! Now it's time to start editing it. Head over to [Building and Editing a Page](#).

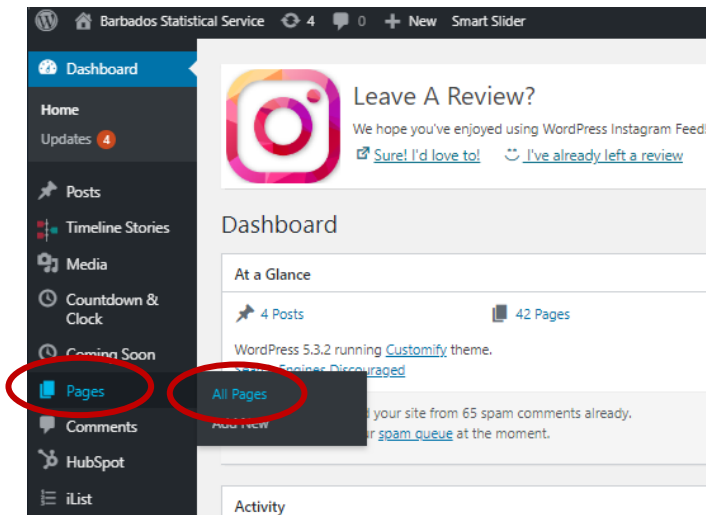
Building and Editing a Page

To edit **pages**, we use the **Beaver Builder** plugin. More specifically, we use different types of **modules** to load and edit different types of content on each page. The Beaver Builder plugin comes with some basic modules, but we highly recommend downloading the following addons to maximize your editing: “**Livemesh Addons for Beaver Builder**” and “**PowerPack Lite for Beaver Builder**” – check out their benefits in [Beaver Builder Addons](#).

Note: Beaver Builder does not work for editing **posts/posts pages**, but we don't tend to use posts for these sites.

Accessing and Using Beaver Builder Editor

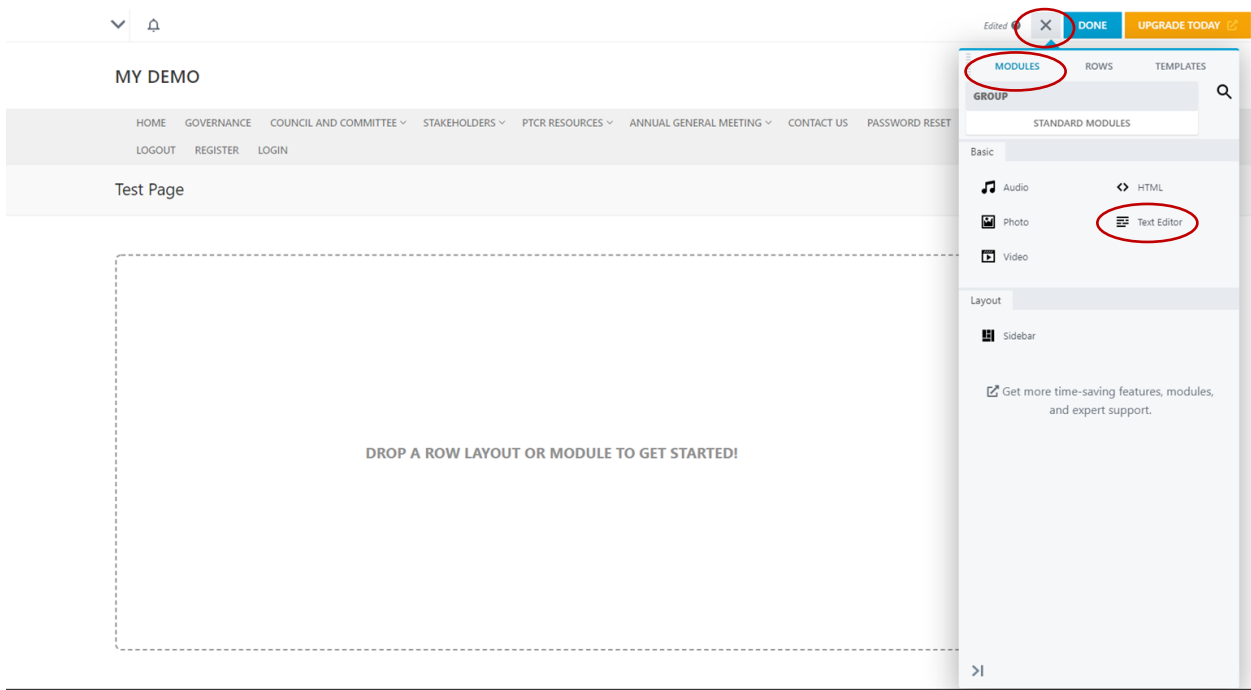
1. To edit a page, first navigate to your **Pages** page in the left sidebar of the dashboard.



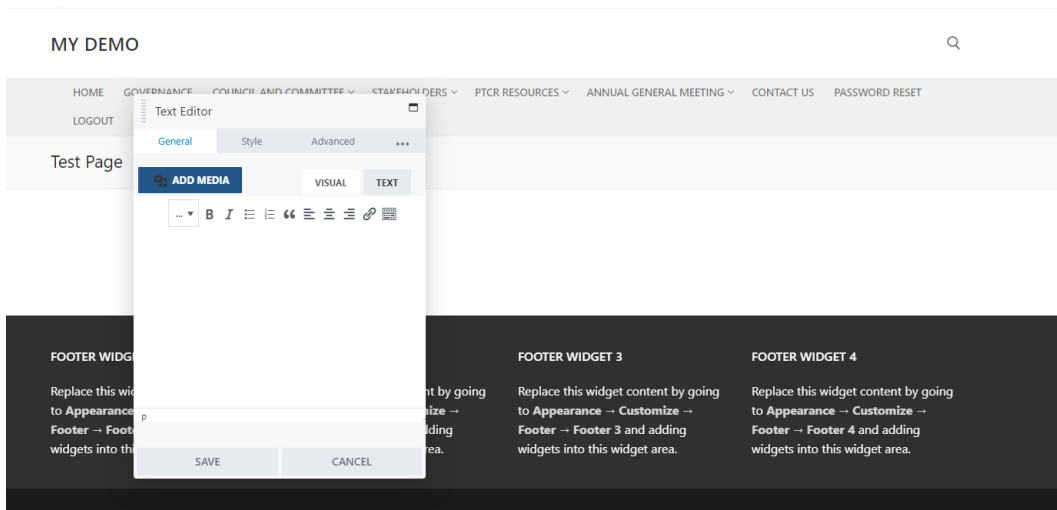
2. Mouse over the page you want to edit and click **Beaver Builder**, this will launch your page in Beaver Builder editing mode.



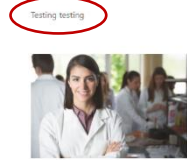
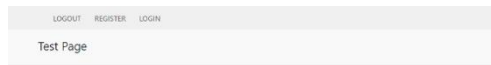
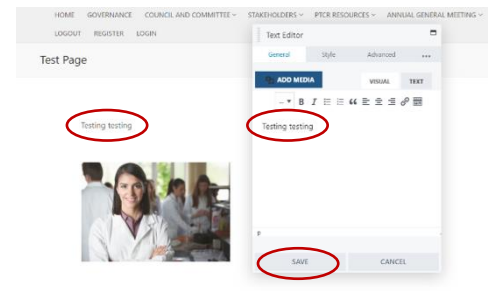
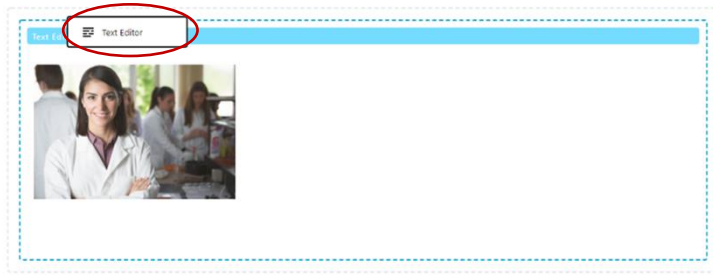
3. Click the grey plus sign button on the top right of the screen to open your options menu. Select the **“Modules”** tab and click and drag one of the options onto your page. If you have installed any Beaver Builder addons, you can browse more module options by clicking through the drop down under **“Group”**.
 - You can use the Text Editor module for entering code, shortcode text, and images.



- Once dragged to the page, the module will open and you can add your content. Once you've completed adding the content to your module, click **Save**. Now you have a block of content on your page.

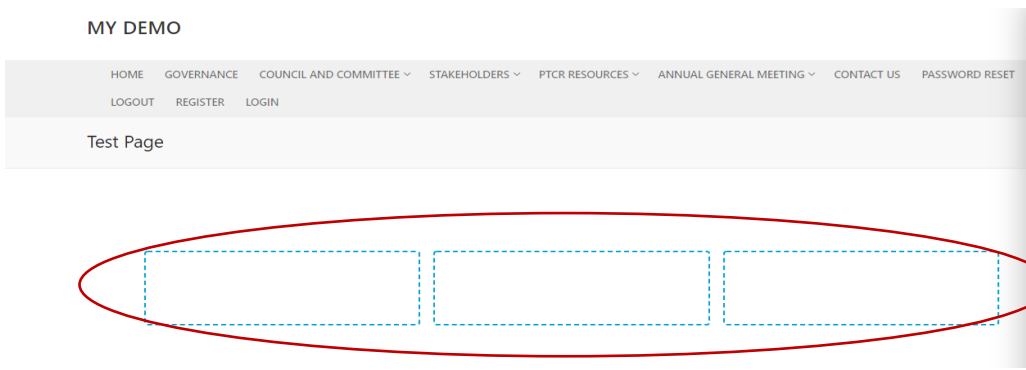
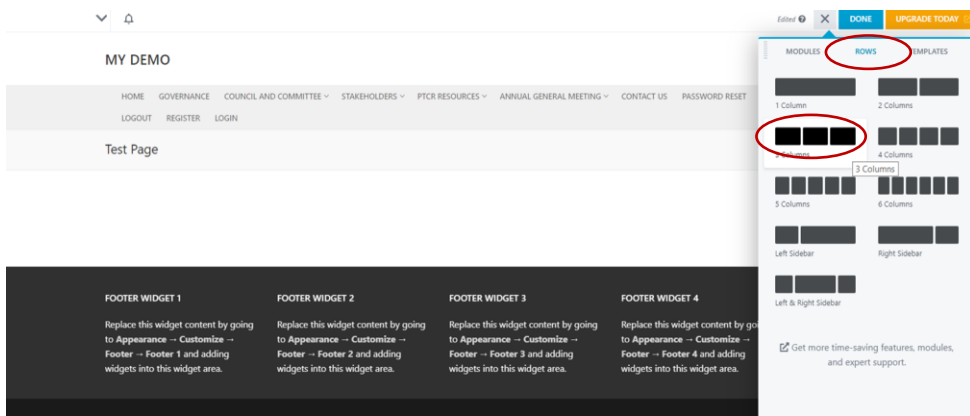


- You can add additional content above or below your current content by clicking and dragging a module to the area.

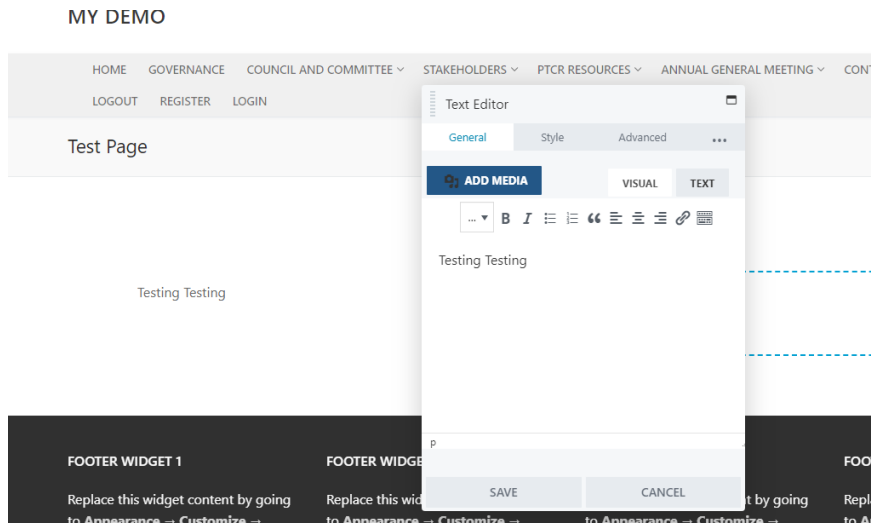


If you would like different blocks of content **side-by-side** on the page, you must start by adding **columns**.

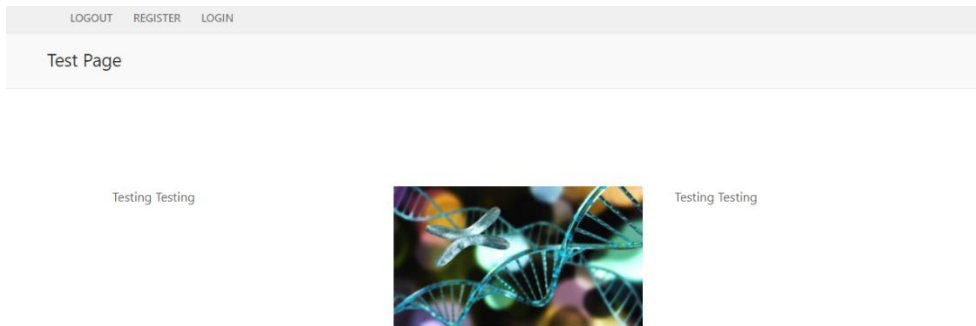
- Click the plus button and select the **Rows** tab. Click and drag the number of columns you would like.



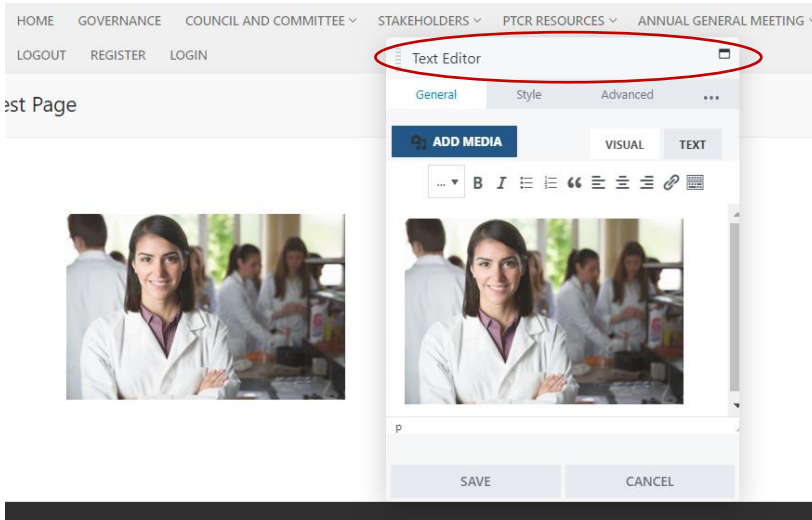
7. Click the “**Modules**” tab in the Beaver Builder menu and click and drag the module you would like to use into one of the columns.



8. You can use a different module in each column.

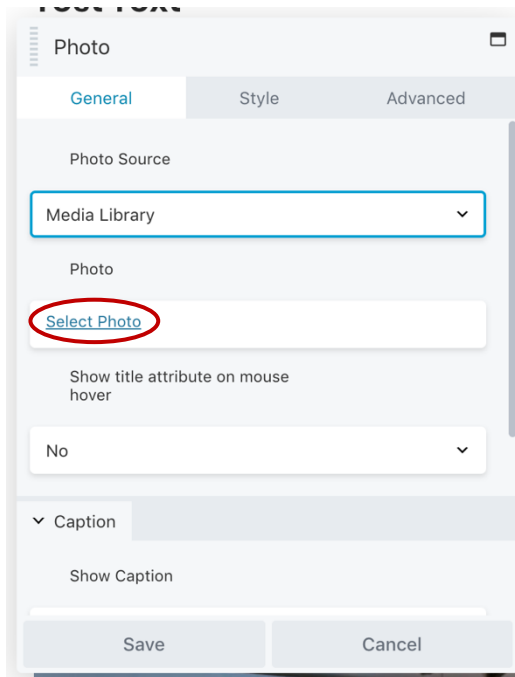


9. You can move your module on your screen to see the content on the page (in editor mode). Mouse over the light grey menu of the module, click and drag to your desired location.

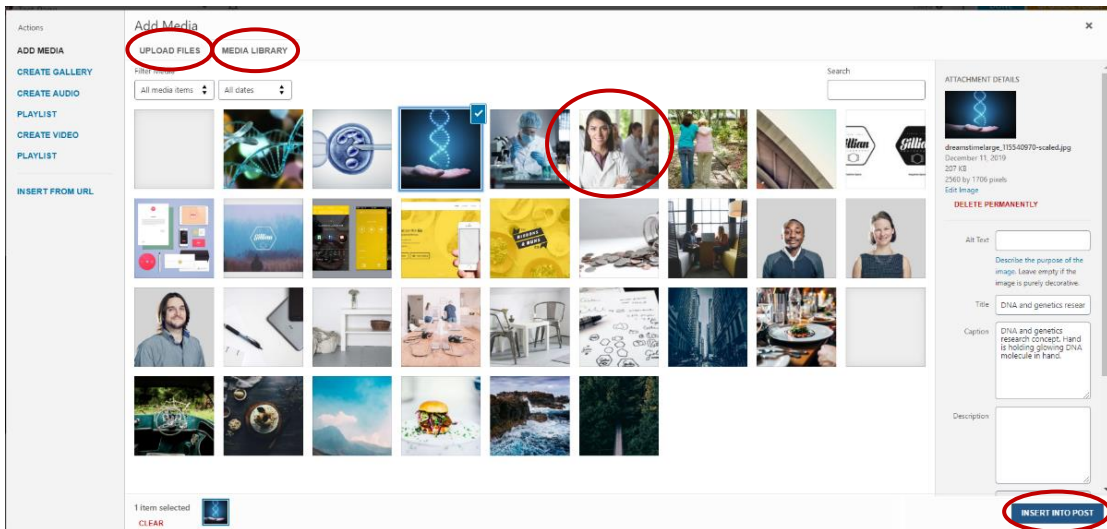


Add an Image

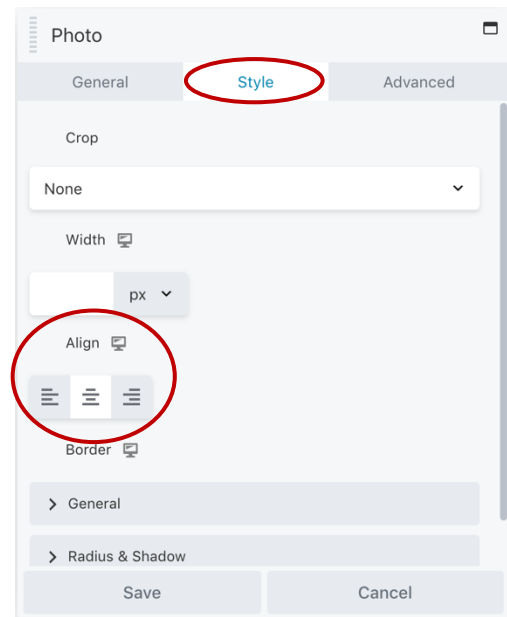
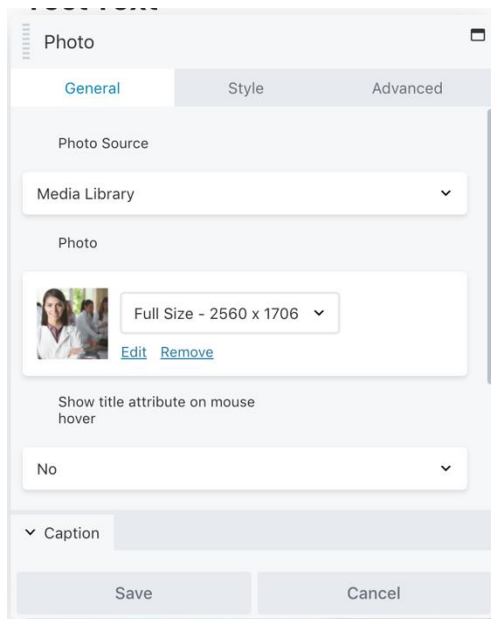
1. To add an **image** to the **Photo module**.



2. Click **Select Photo** and either select an image from your **Media Library** or upload one from your computer. You can also add an image to your page using the **Photo module**. Click **Insert into Post**.

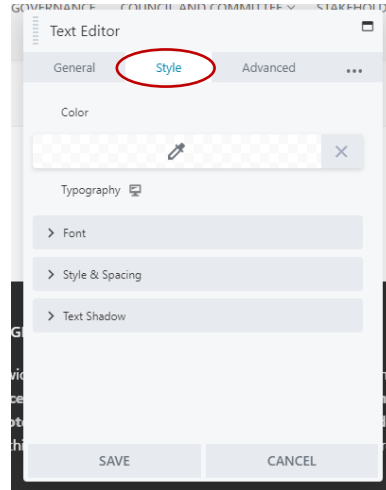
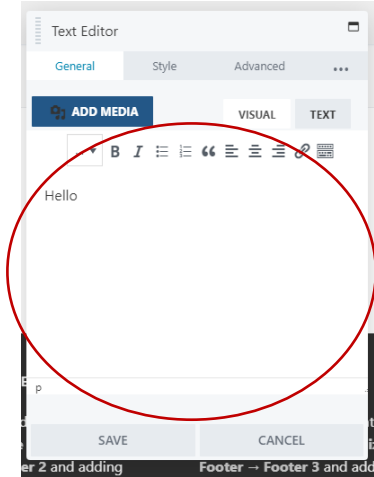


- Your photo will be added to the **Photo** module. You can change the alignment of the photo under the **Style** tab under **Alignment**.



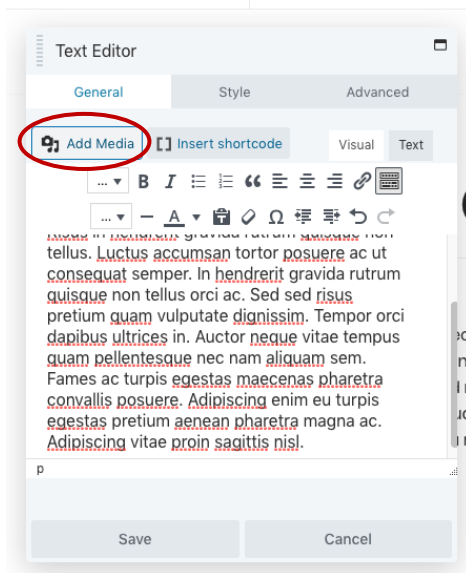
Add Text

To add **text** to your page using the text editor, type directly into the text box. You can stylize the text by clicking the **Style** tab and playing with the options in the drop-down menus.



Add a PDF

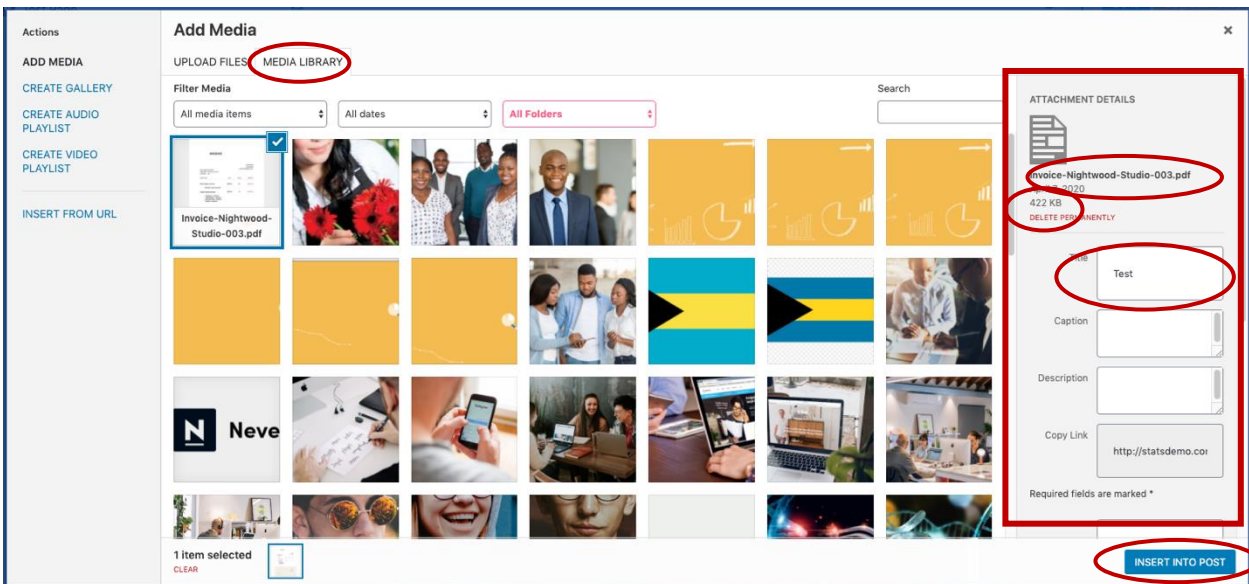
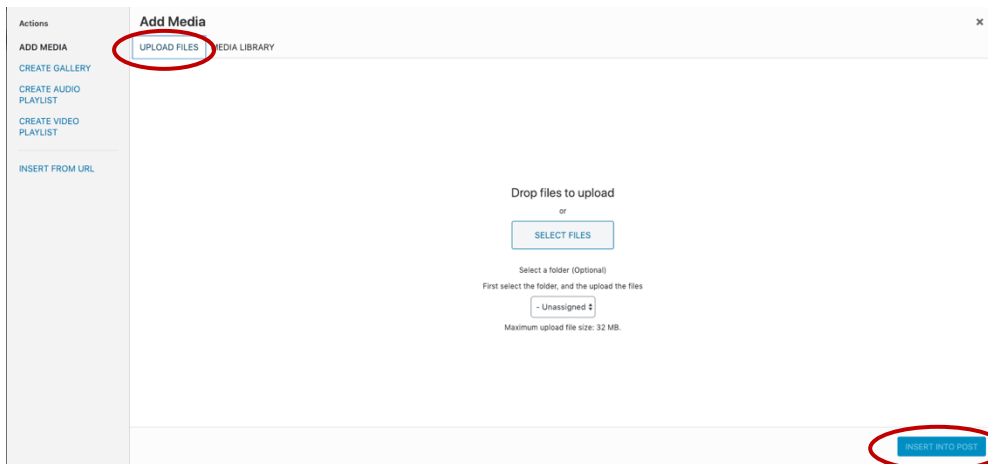
1. In the Text Editor module, place your cursor where you want to load the PDF. Click **Add Media**.



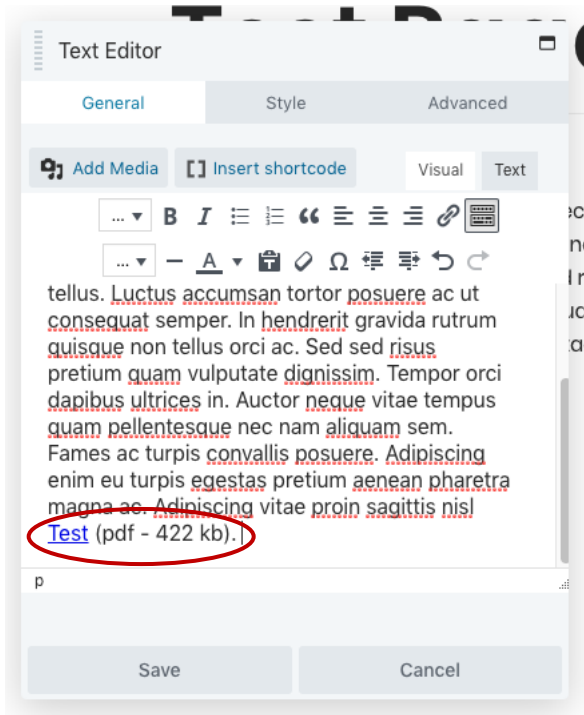
2. If the PDF is not already in your Media Library, upload it manually by clicking **Upload Files**. Once it's loaded it will be saved under the Media Library tab. Select it and click **Insert into Post**.

Note: By default, the system incorporates the file name into the Title Box, so rename it properly (on the right side under **Attachment Details**) since this is what will be displayed as text on the link. For example, I renamed mine "Test".

Make sure to note the file size since it is a best practise to add the file type and file size information beside the link (also under **Attachment Details**).

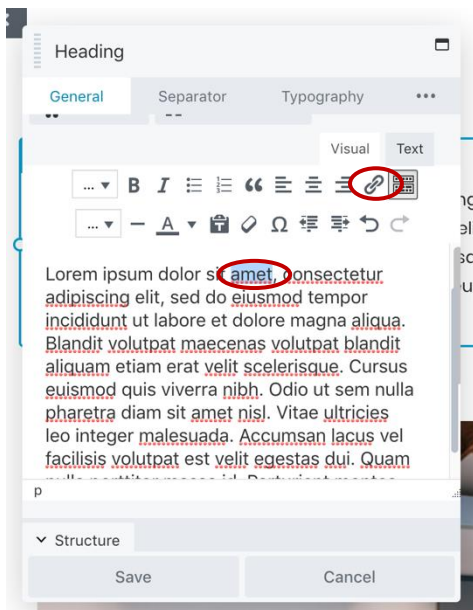


3. The PDF is now inserted into the text, displayed as a link with the title you gave it. Now add the file type and size in brackets beside it. Click **Save** and you're done!

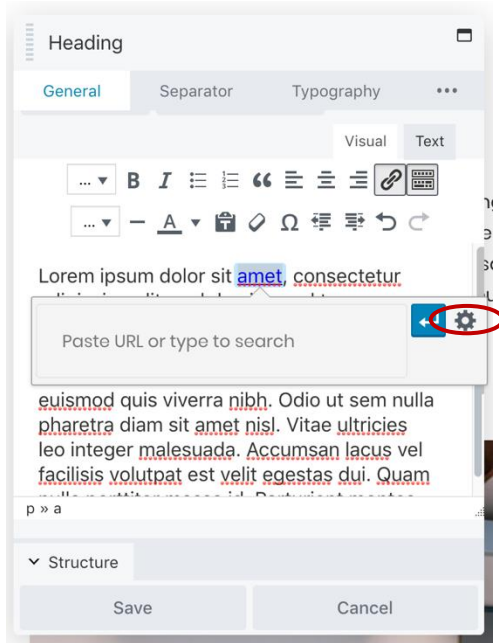


Embed a Link

1. In the **Text Editor** module select the text into which you want to embed a link and lick on the link icon in the tools menu.



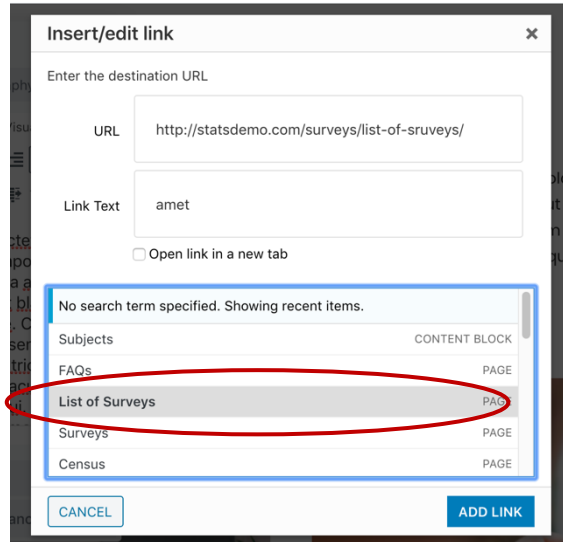
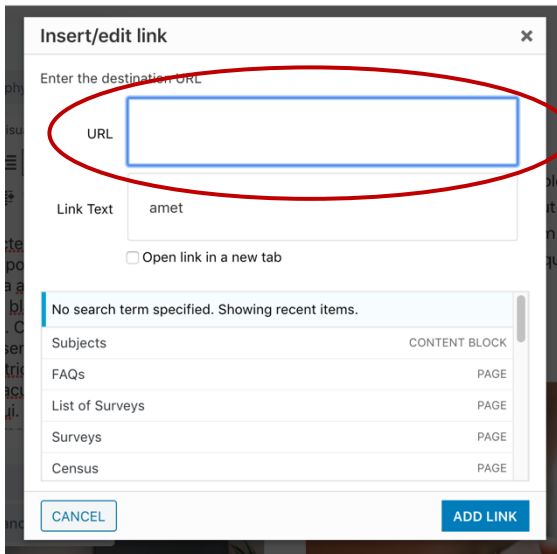
2. A link box will appear directly below the text you selected for the link. Click on the **gear** button.



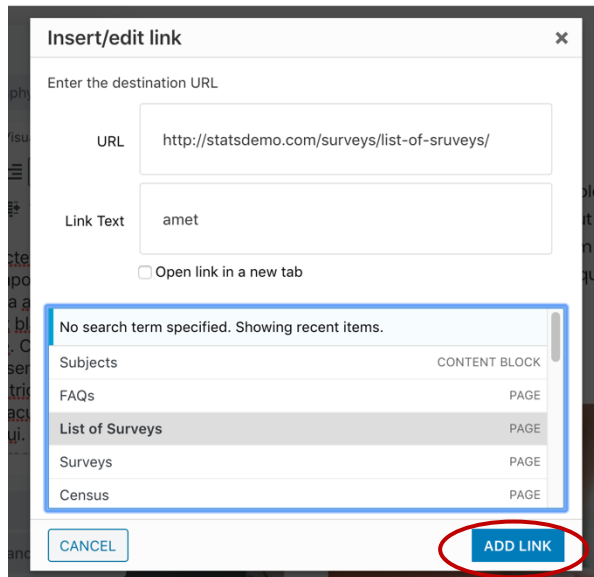
3. An overlay "Insert/edit link" will appear.

If the link you are embedding goes to an external site, type it in the URL bar.

If you want to link to another page on your site, select the page from the list at the bottom. The URL box will automatically update with the link to the page.

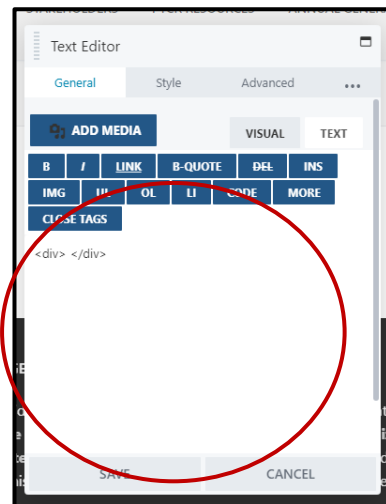
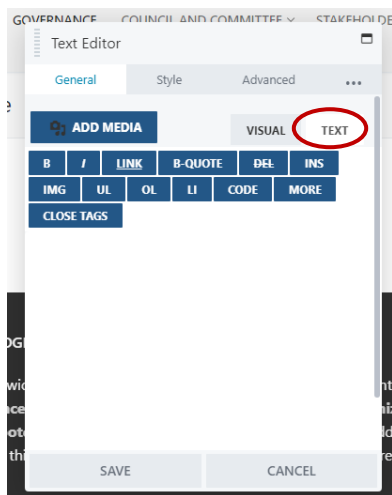


Click on the “Add Link” button.



Add Code

To add **code**, click the “Text” tab and type/insert the code directly into the text box. The “Text” tab will also show you the source code of whatever you put on the “Visual” side. Often, when you insert code, it looks strange on the page. Make sure you Preview your work to see that it worked (check out [Preview your Work](#)). If it still looks strange, then the text editor may not be accepting the code, this happens sometimes. If this is the case, you will have to put the code into a **content block** and insert the content block’s shortcode into the text editor. Find the instructions in [Content Blocks](#).



Create and Add a Slider

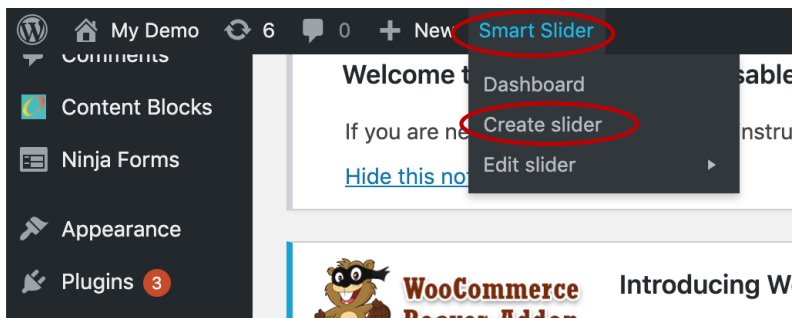
To make a slider, make sure you have installed and activated the **Smart Slider 3** plugin. Click [here](#) for a video tutorial.

Note: For best results, use landscape/horizontally oriented photos as opposed to portrait/vertically oriented images.

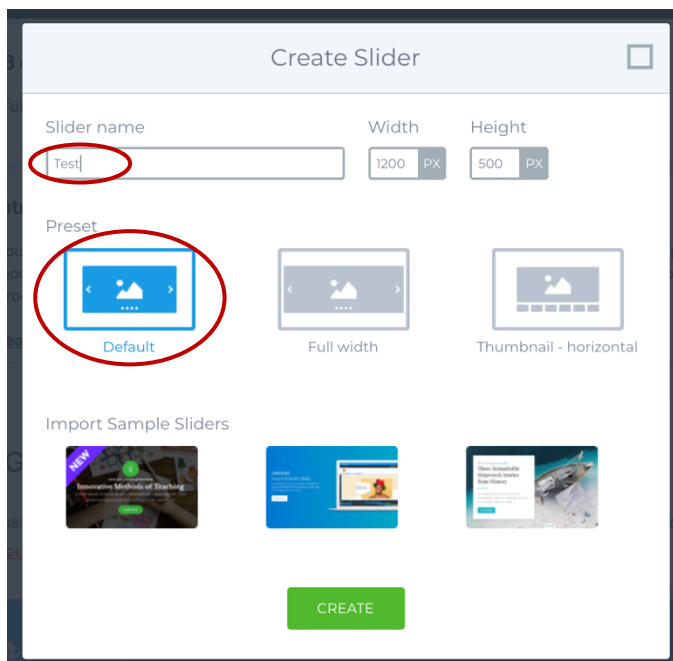
Create a Slider

For more detailed information, check out the video provided on the Smart Slider dashboard.

1. On the admin bar, mouse over **Smart Slider** and select **Create Slider**.

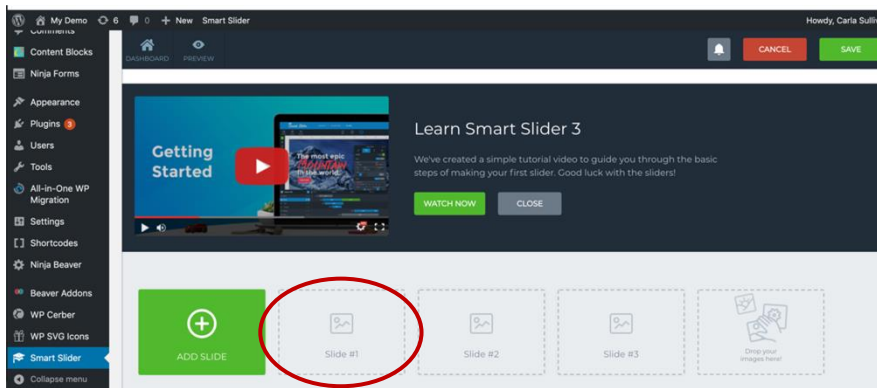


2. Give your slider a name and select a slider pre-set, we recommend **Default**. Click **Create**.

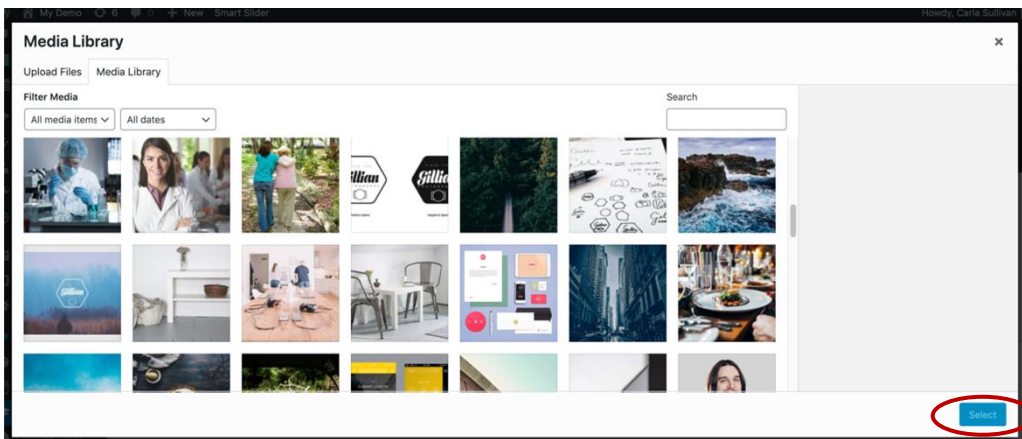


3. Scroll down and click **Slide #1**.

Note: At the beginning of the page there is a video tutorial on making a slider, check it out!

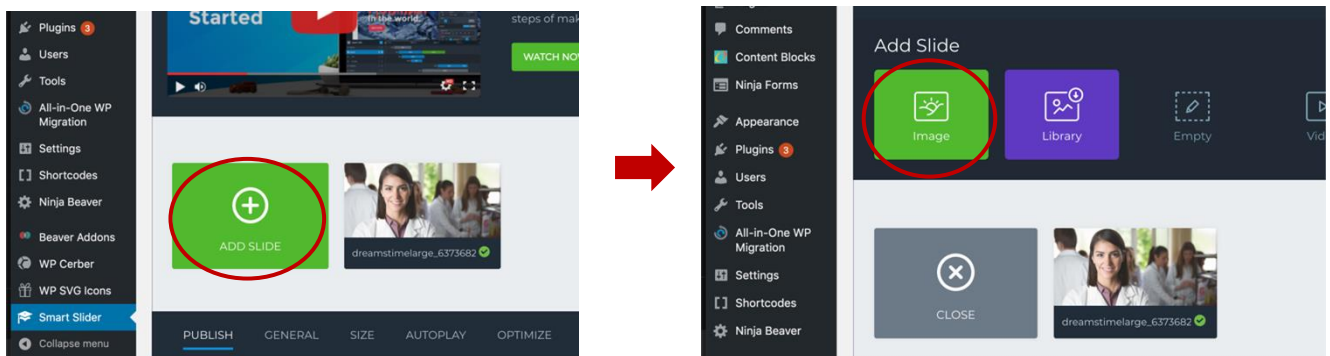


4. The **Media Library** will appear. Select your photo and click **Select**.

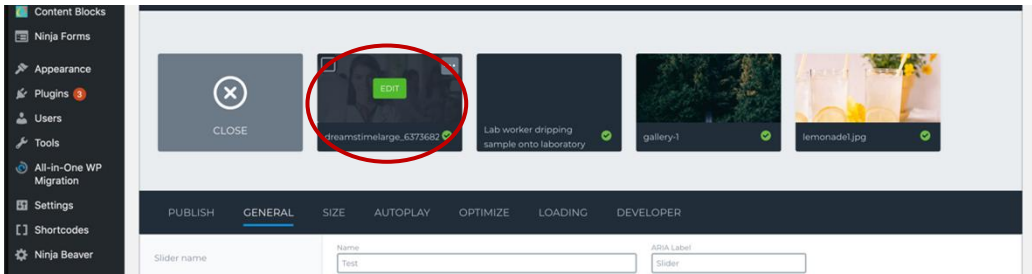


For this slider, images must be 1200px by 500px. If your image is larger, you can either re-size it or crop it (or both) or click [here](#).

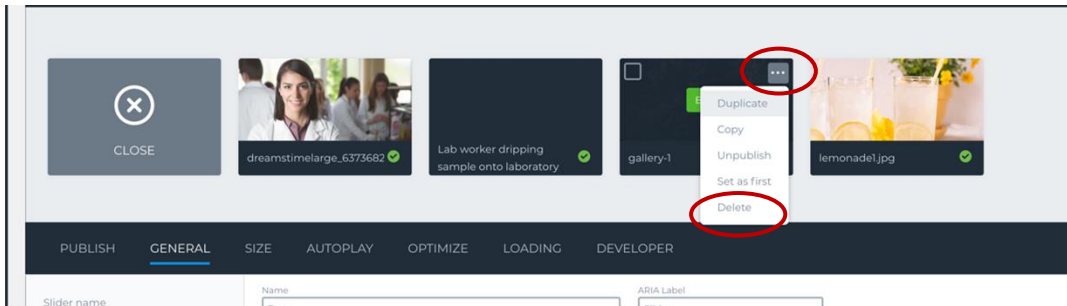
5. Add more images by clicking **Add Slide** click **Image**.



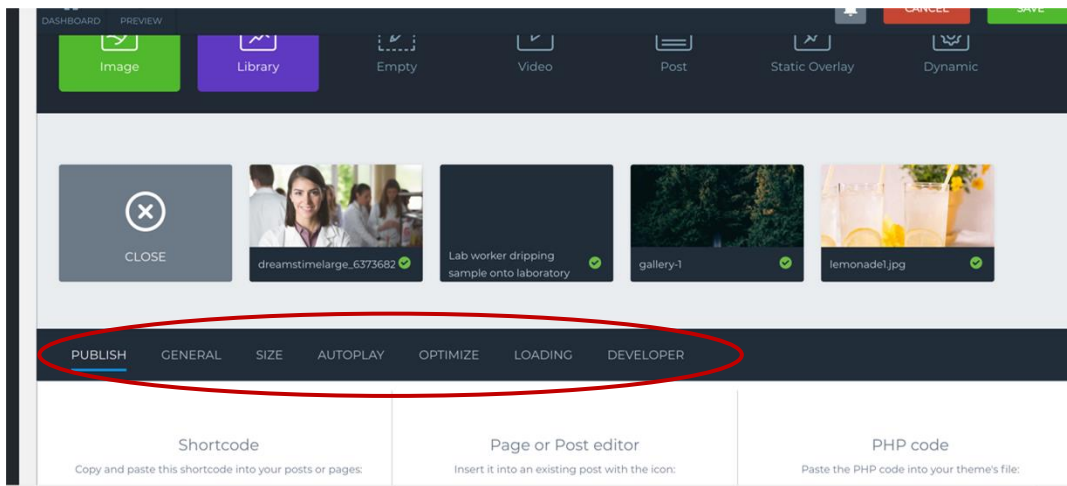
6. To edit a slide, mouse over the image and click **Edit**.



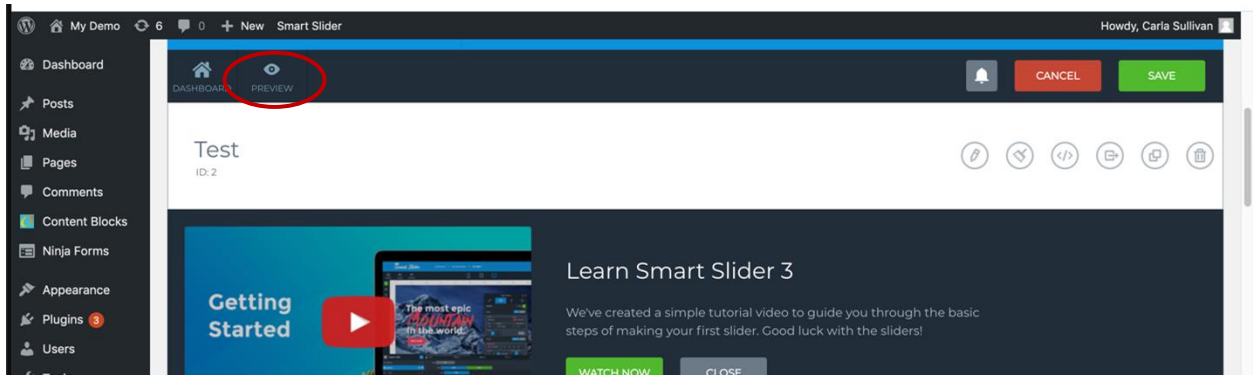
7. To delete a slide, mouse over the image, lick the **ellipses** and select **Delete**.



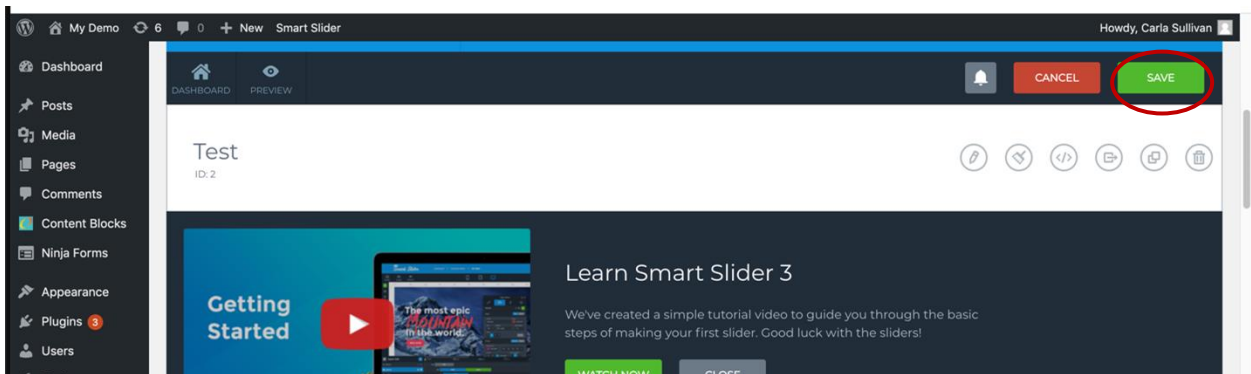
8. Once your images are loaded, you can review/change various features of the slider. Browse through the tabs.



9. To Preview your slider, click **Preview** at the top of the page.

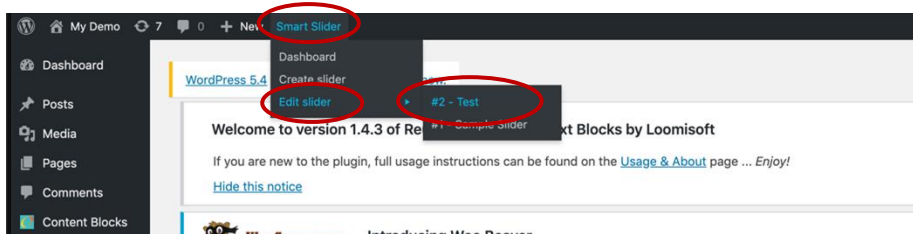


10. Once you're finished creating your slider, click **Save**.

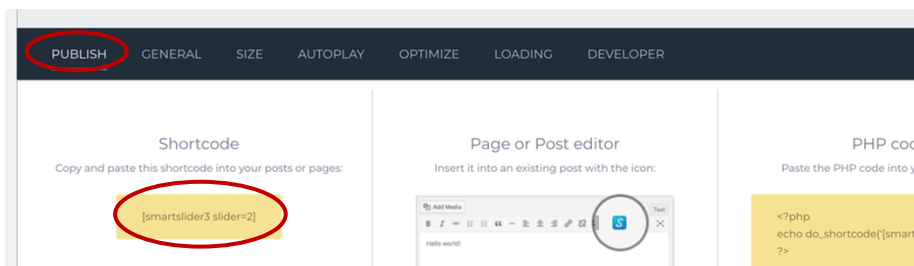


Add a Slider

1. Before you can add your slider to a page, you need to mouse over **Smart Slider** in the admin bar, go to Edit slider and select the slider you created.

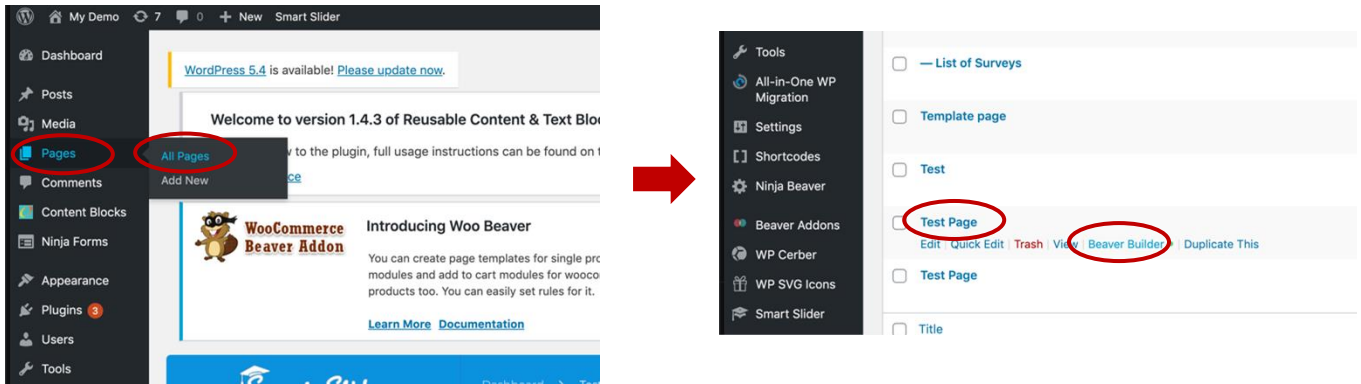


2. Under the **Publish** tab (you may have to scroll down a bit) you will see a box that says **Shortcode** with a code highlighted in yellow below. Copy that code, including the square brackets.

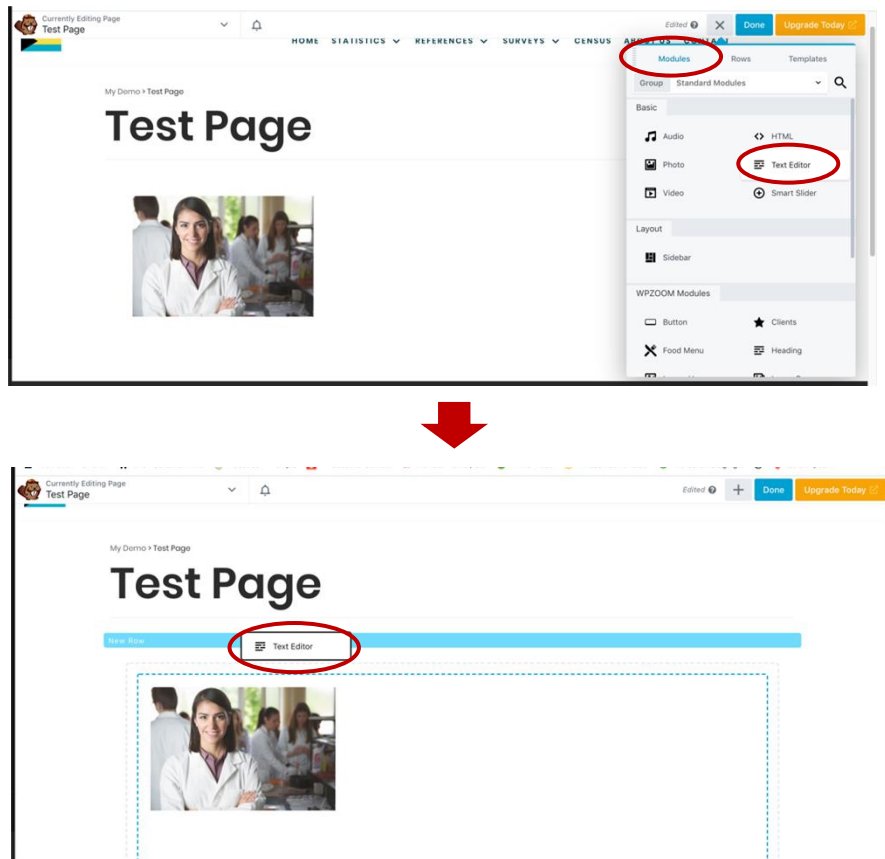


3. Navigate to the page where you want to insert the slider, make sure Beaver Builder is launched.

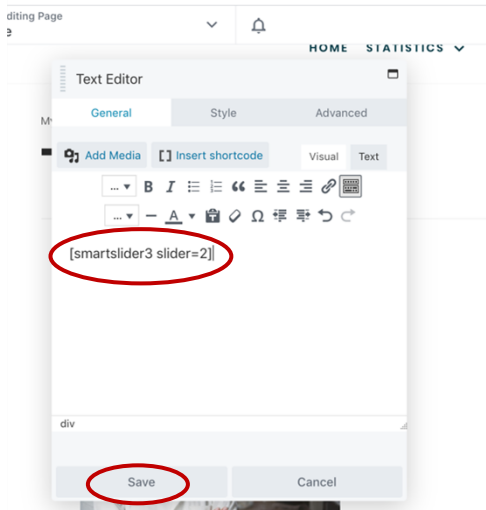
Pages > All Pages, mouse over the page and click **Beaver Builder**.



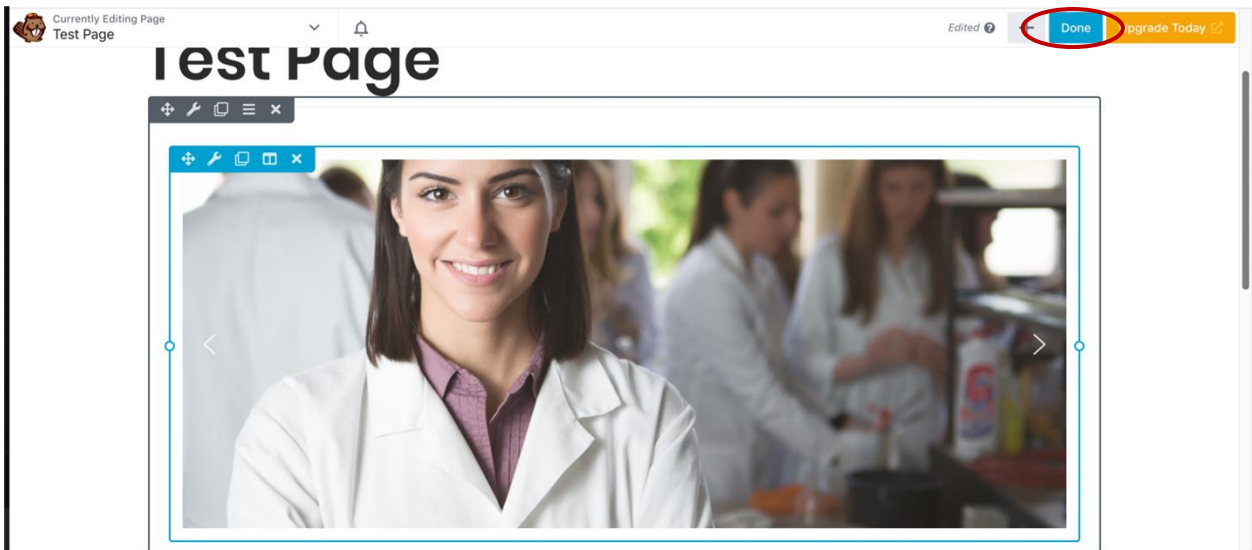
4. From the Beaver Builder editor, click and drag a **Text Editor** module to where you want your slider placed.



5. Paste the shortcode into the text editor and save.



6. You will either get a preview of your slider, or just see the code on the page (that's totally normal!). Click **Done > Publish** to see how it looks. Sometimes you must refresh the page after as well.



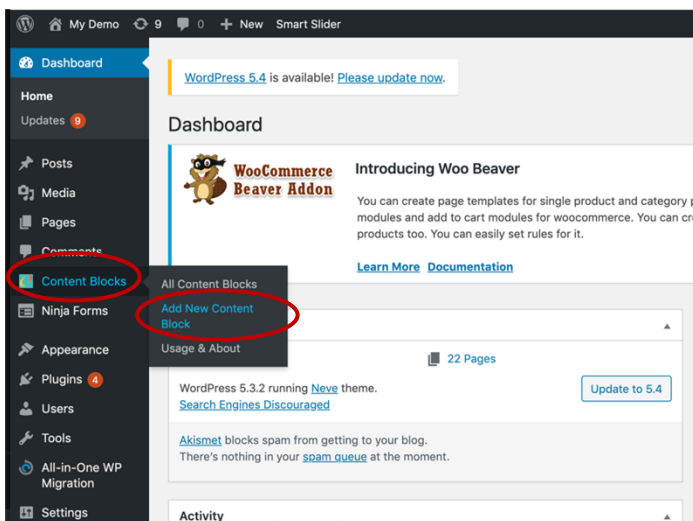
Create and Add a Content Block

In order to make content blocks, you must have the **Loomisoft's Reusable Content & Text Blocks plugin** (shortened to **Content Blocks** on your dashboard) installed and activated. Content blocks allow you to define and publish content for use on multiple pages, posts, and other places. You can make edits to the content block which will apply to all its locations on your site, this avoiding making changes in multiple places.

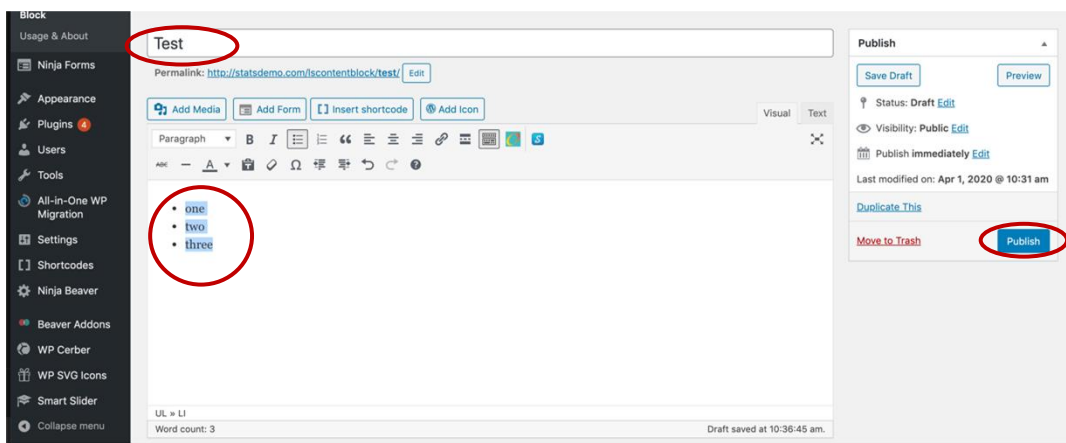
On these sites, we use content blocks most often to organize data (which appear in multiple locations) either in the form of **lists** or **accordions**.

Create a Content Block

1. On your dashboard, mouse over **Content Blocks** and select **Add New Content Block**.



2. Give your content block a name and input the content you want in the block in the text editor. You can build content blocks with shortcodes. For this example, we will input a list. When finished, click **Publish**.

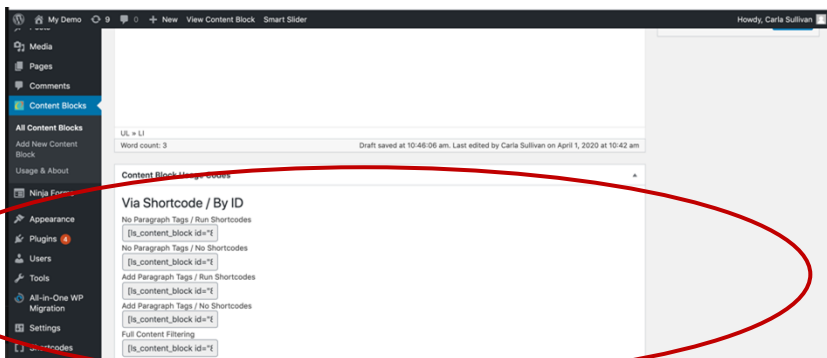
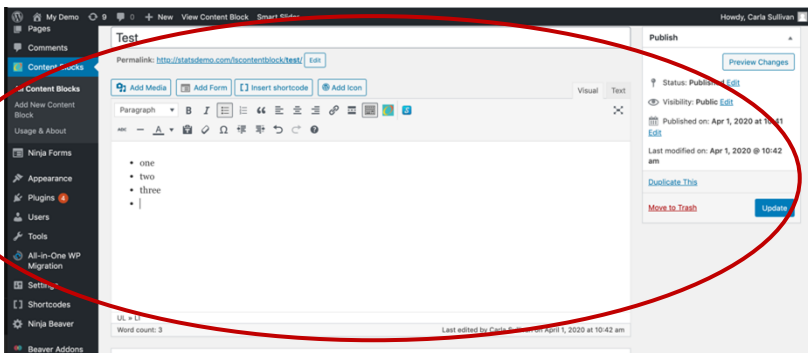


You now have a content block!

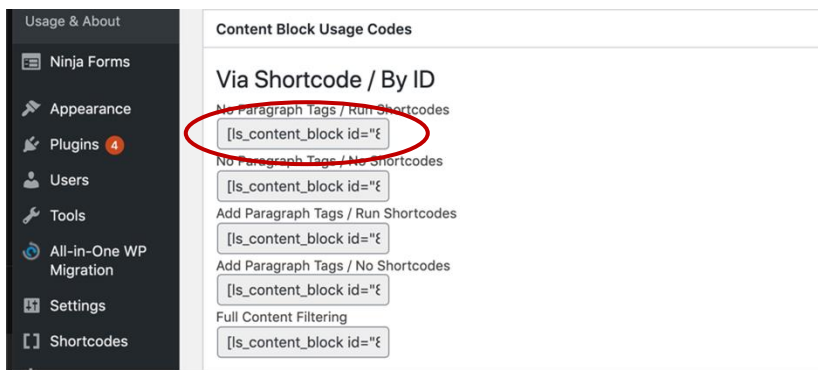
Add a Content Block

If you are already on your content block, follow these instructions. If you are **not** already on your content block, skip to **step 3**.

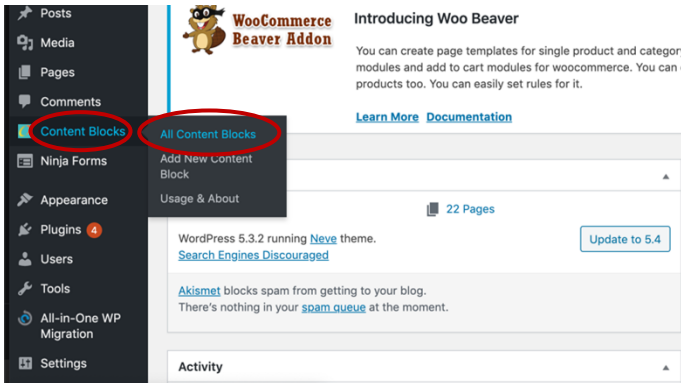
1. scroll down a little bit to Content Block Usage Codes.



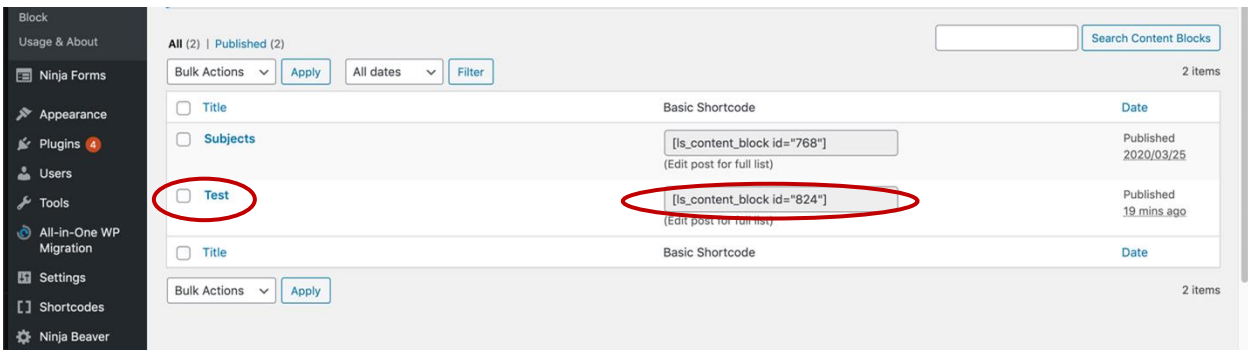
2. Copy the full code under No Paragraph Tags /Run Shortcodes. Now skip to **step 5**.



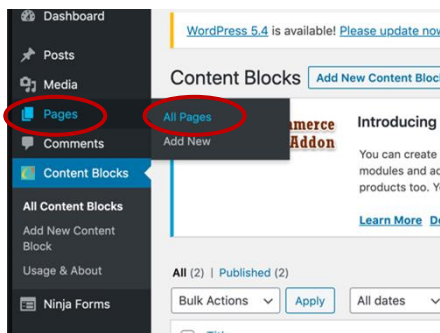
- If you are **not** already on your content block, mouse over **Content Blocks** on the left sidebar of your dashboard and select **All Content Blocks**.

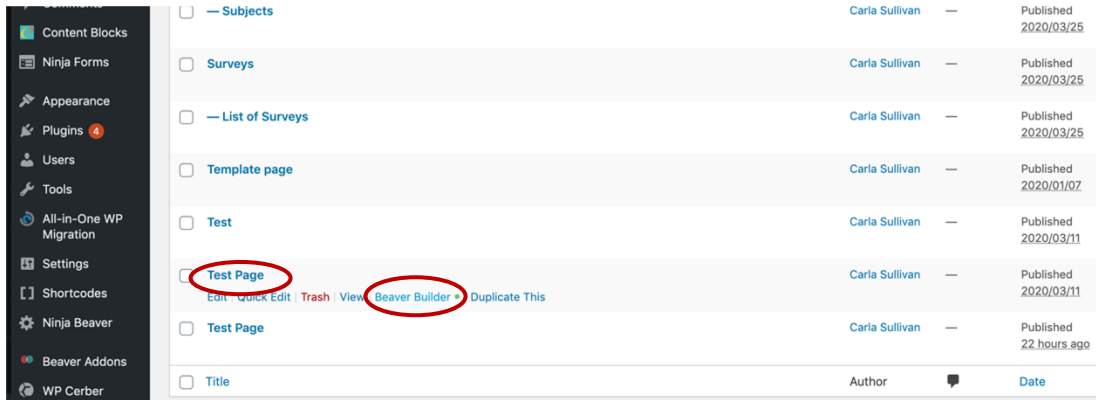


- Find the content block you want to use and copy the shortcode to the right of it.

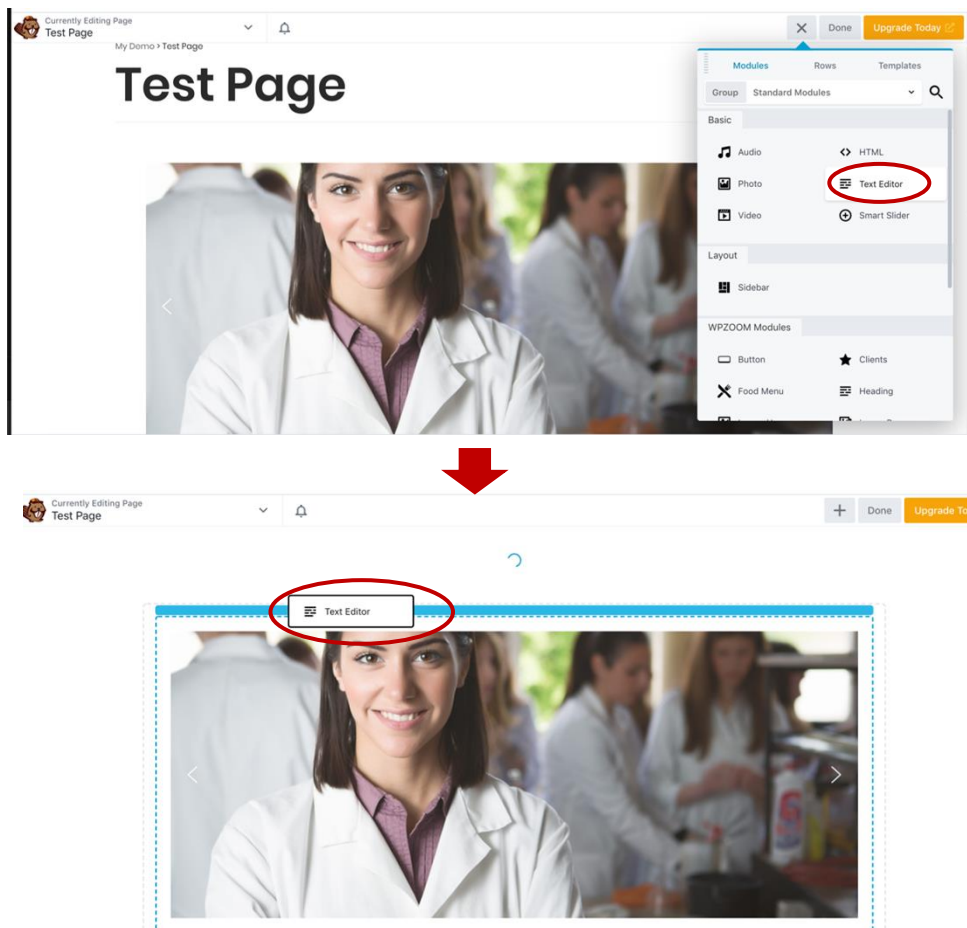


- Navigate to the page where you want to insert your content block (**Pages > All Pages** in the left sidebar) and launch **Beaver Builder**.

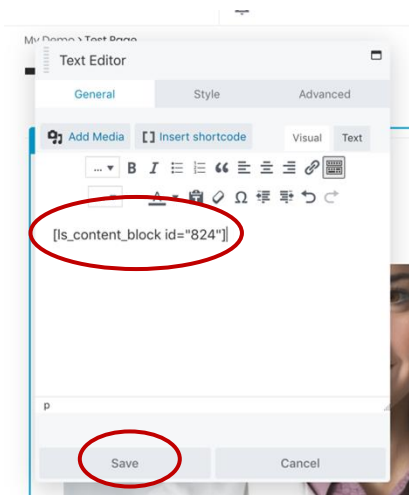




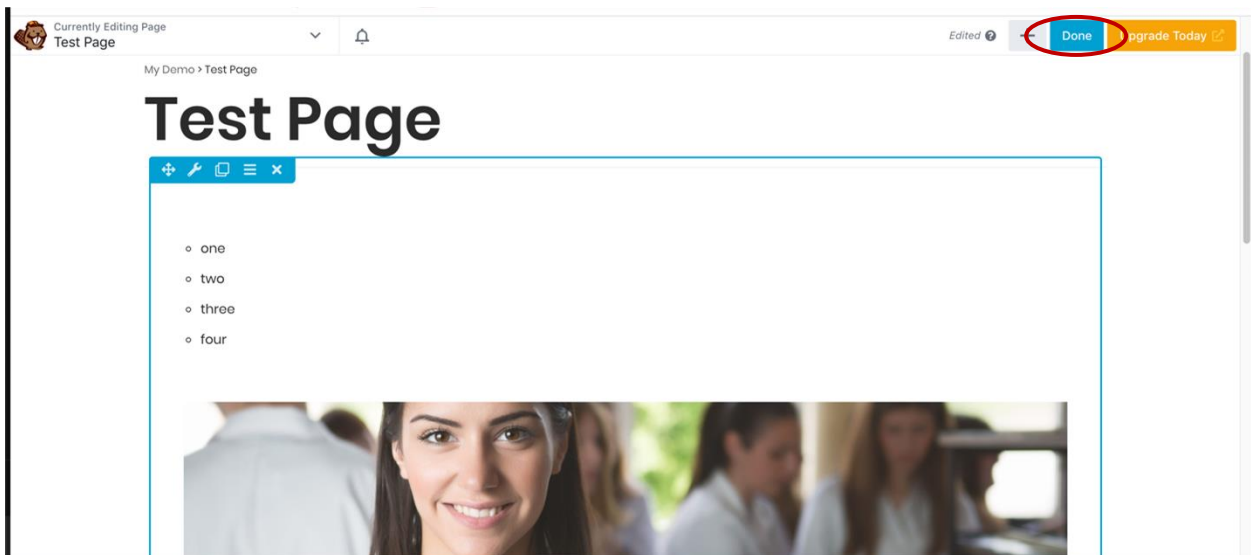
6. In the Beaver Builder editor, click and drag the text module to your desired location on the page.



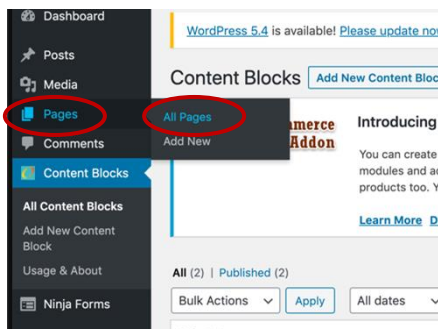
7. Paste the shortcode into the text editor, click save.

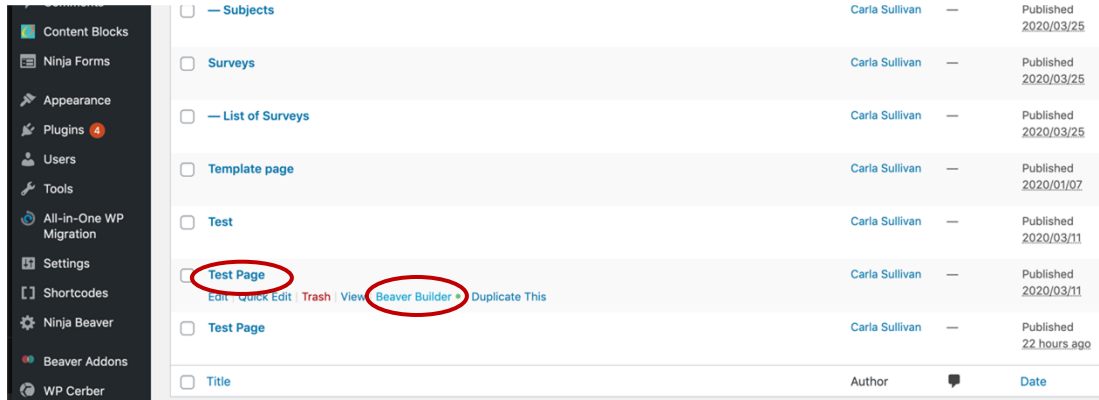


8. To view the new content block, click **Done** > **Publish**.



9. Repeat the same steps to add the same content block on other pages. Any changes you make the content block itself (in the content block plugin) will automatically update on all the pages where the content block is updated.

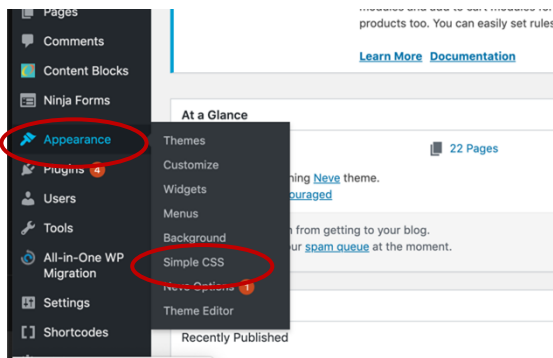




Adding CSS

You can style HTML elements on your site using Cascading Style Sheets (CSS). We only recommend applying CSS if you know how to use it.

For this, you will need to have installed and activated the **Simple CSS** plugin. To access **Simple CSS**, go to **Appearance** on the left sidebar in the dashboard and select **Simple CSS**.



When adding CSS, make sure to include pseudocode to label your work and that it is placed in the appropriate media query. The CSS will only show up on your site once you have clicked **Save CSS**.

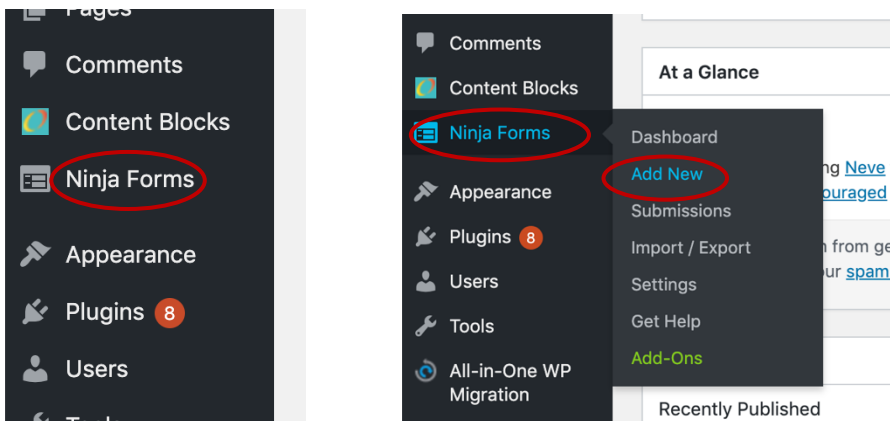


Creating and Adding a Form

There are many free plugins for creating forms, but we strongly suggest using **Ninja Forms** as we have tested; make sure you have it installed and activated. At minimum, your site should have a contact form as well as a data request form. Here we will show you how to make a contact form, after which you should be able to make a data request form on your own.

Create a Form

1. On the Left Sidebar click on **Ninja Forms**. Or mouse over **Ninja Forms** and select **Add New**.



2. Click **Add New**.

Forms Services Apps & Integrations

ADD NEW Search Forms

TITLE	SHORTCODE	DATE CREATED
Contact Me	[ninja_form id=1]	03/26/20 8:26 AM

3. Select **Contact Form**.

Blank Form
The blank form allows you to create any type of form using our drag & drop builder.

Collect feedback
Collect feedback for an event, blog post, or anything else. You can add and remove fields as needed.

Contact Us
Allow your users to contact you with this simple contact form. You can add and remove fields as needed.

Create a Post
Allow users to create posts from the front-end using a form, including custom post meta!

Delete Data Request
Includes action to add users to WordPress' personal data delete tool, allowing admins to comply with the GDPR and other privacy regulations from the site's front end.

Edit User Profile
Allow WordPress users to edit their profiles from the front-end, including custom user meta!

4. A basic contact form will be loaded. Click the + button to additional fields.

Create multi-column form layouts with Layout & Styles...learn more now

Form Fields Emails & Actions Advanced Preview Changes **PUBLISH**

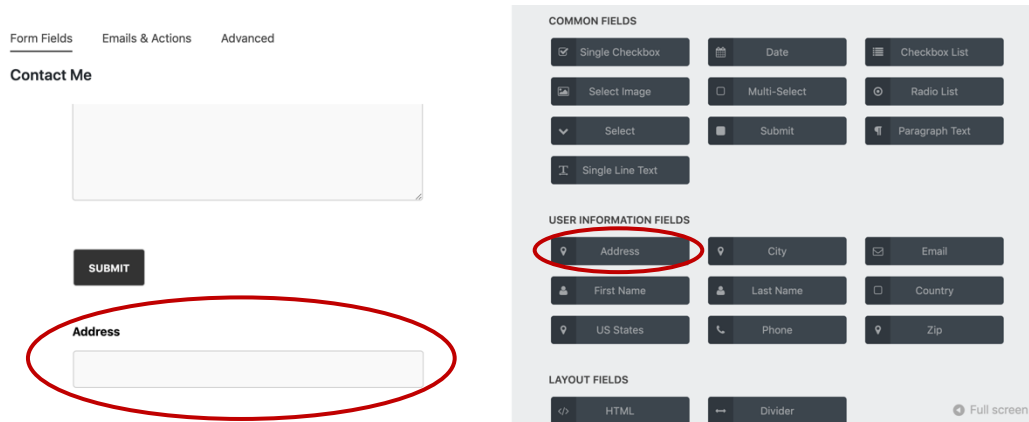
Contact Me

Name *

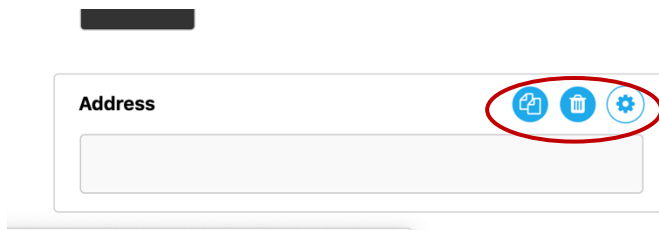
Email *

Message *

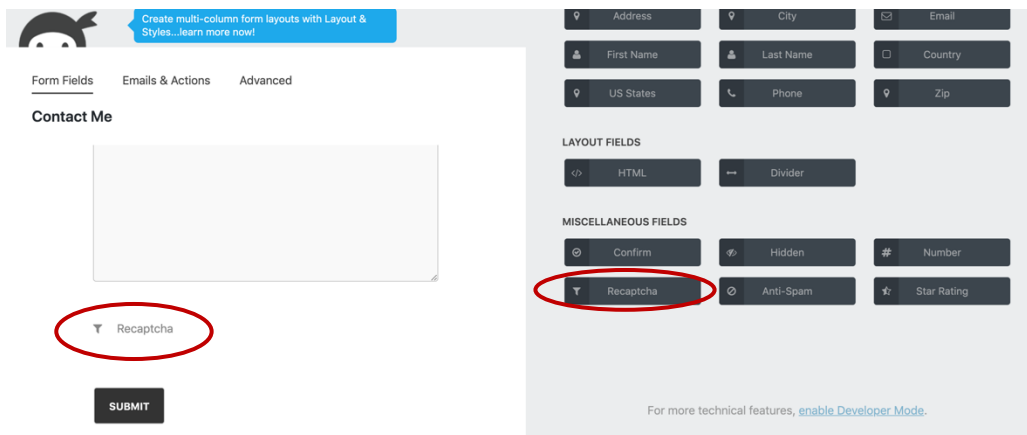
5. Click on the field you would like to add, and it will appear at the bottom of the form on the left. To change its position, click and drag it to your desired spot.



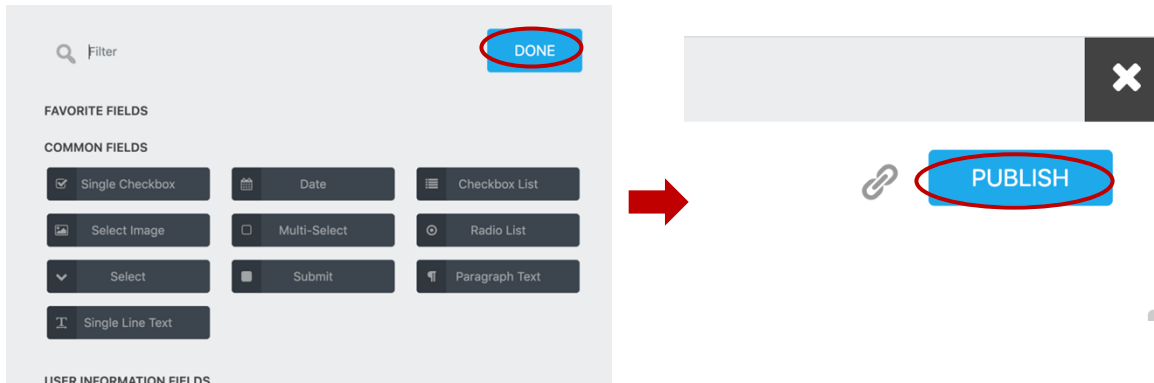
6. To delete a field, mouse over the field and over the gear icon. Select the trash icon.



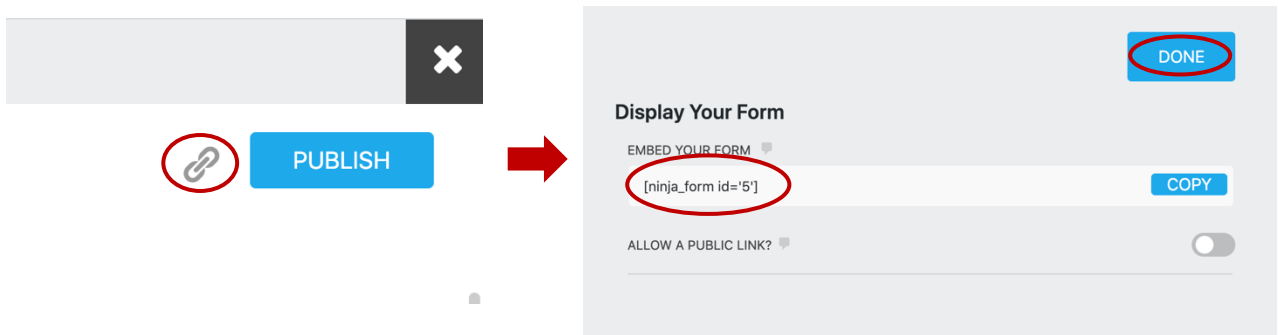
7. For security purposes, make sure to add the **Recaptcha** field and place it above the **Submit** button.



- When you have completed adding the fields, click **Done**, then **Publish**.



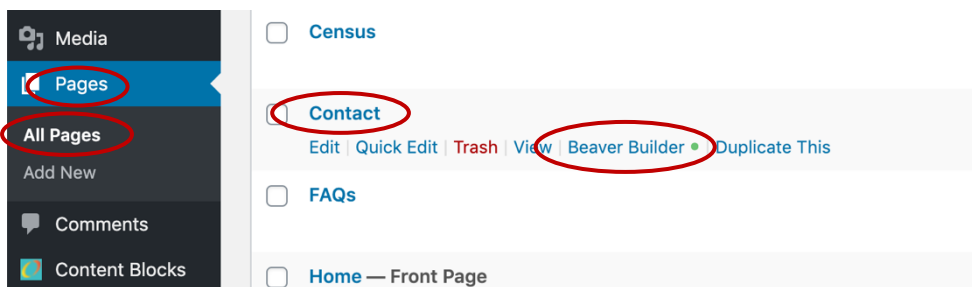
- Click the paperclip icon and copy the shortcode under **Embed Your Form**. Click **Done**. Click the X button on the top right-hand corner to exit the form.



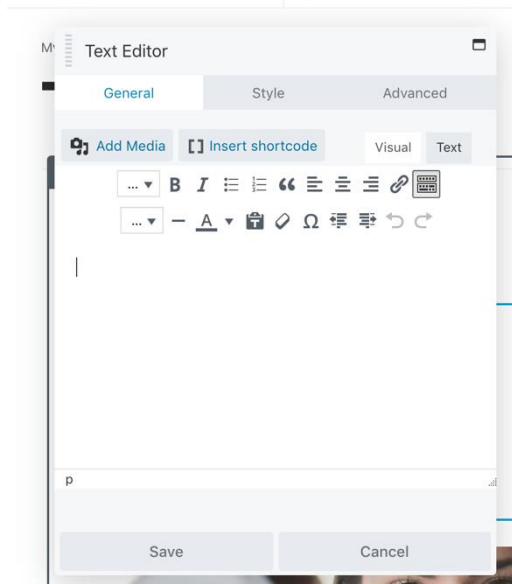
You now have a form!

Add a Form

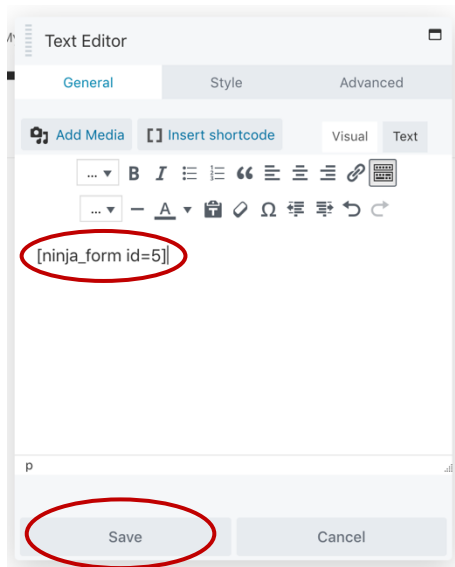
- Go to the **All Pages** page and mouse over the page you plan on adding the form to; in this case, it should be the Contact page. Click **Beaver Builder**.



- From the **Beaver Builder** editor, click and drag the **Text Editor** module onto the page.



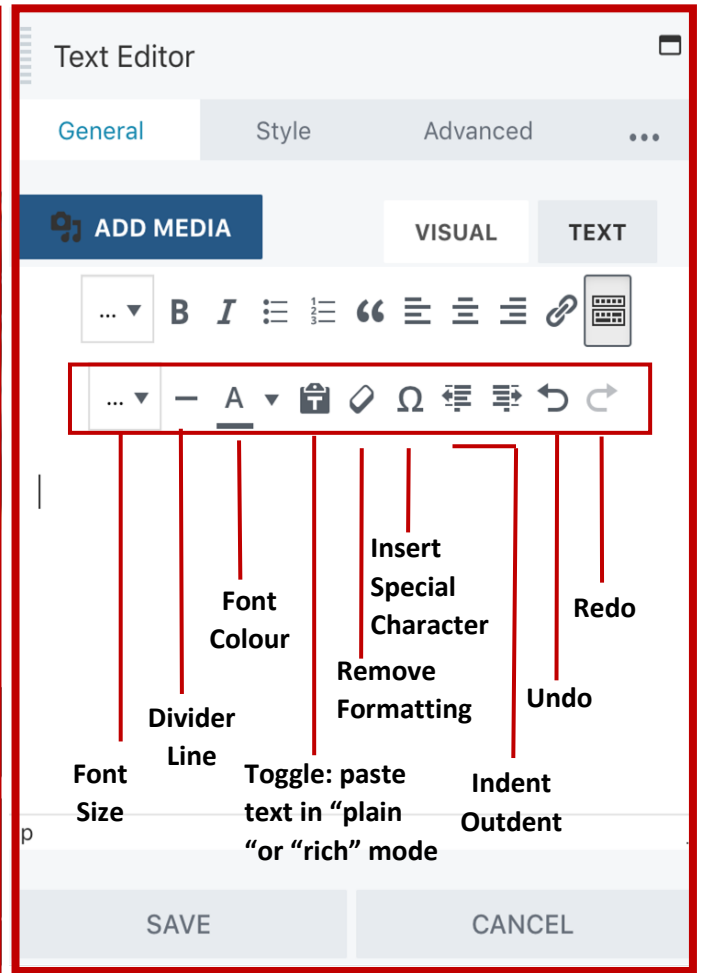
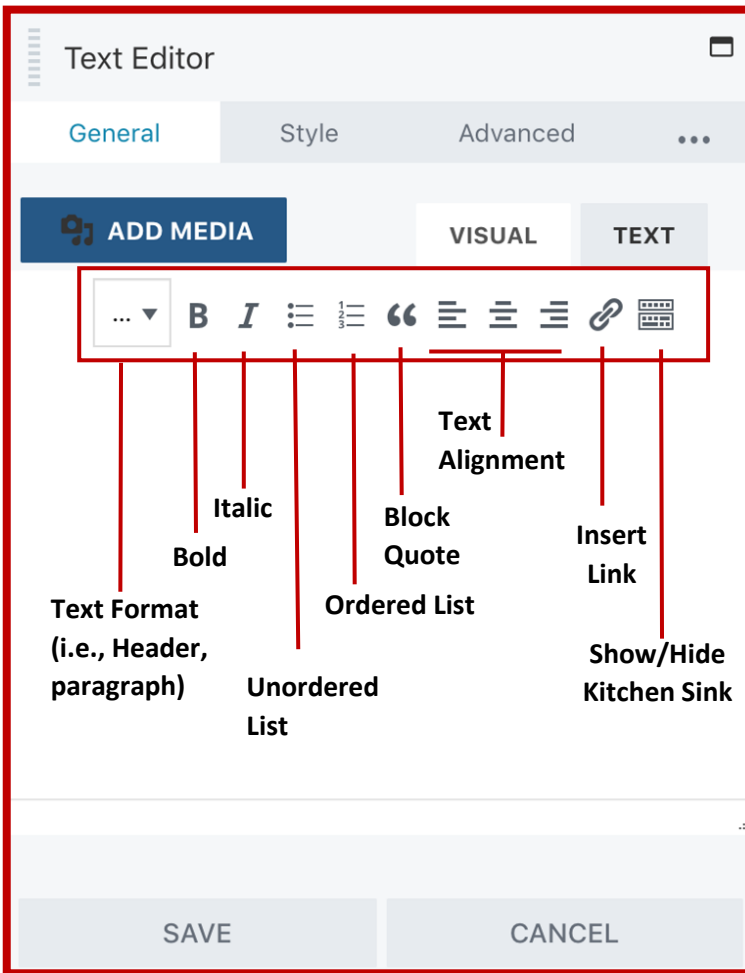
- Paste the shortcode into the **Text Editor** module and click **Save**.



You now have a form on the page!

Text Editor Toolbar

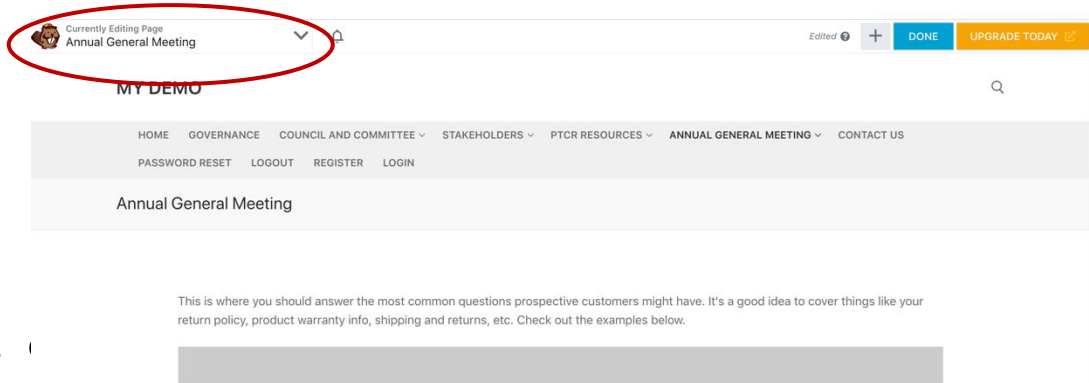
The Text Editor module in **Beaver Builder** has various editing options. By default, the editor displays the most common editing functions along with a toggle to display or hide the second or lower toolbar. Below is a quick reference guide to both toolbars.



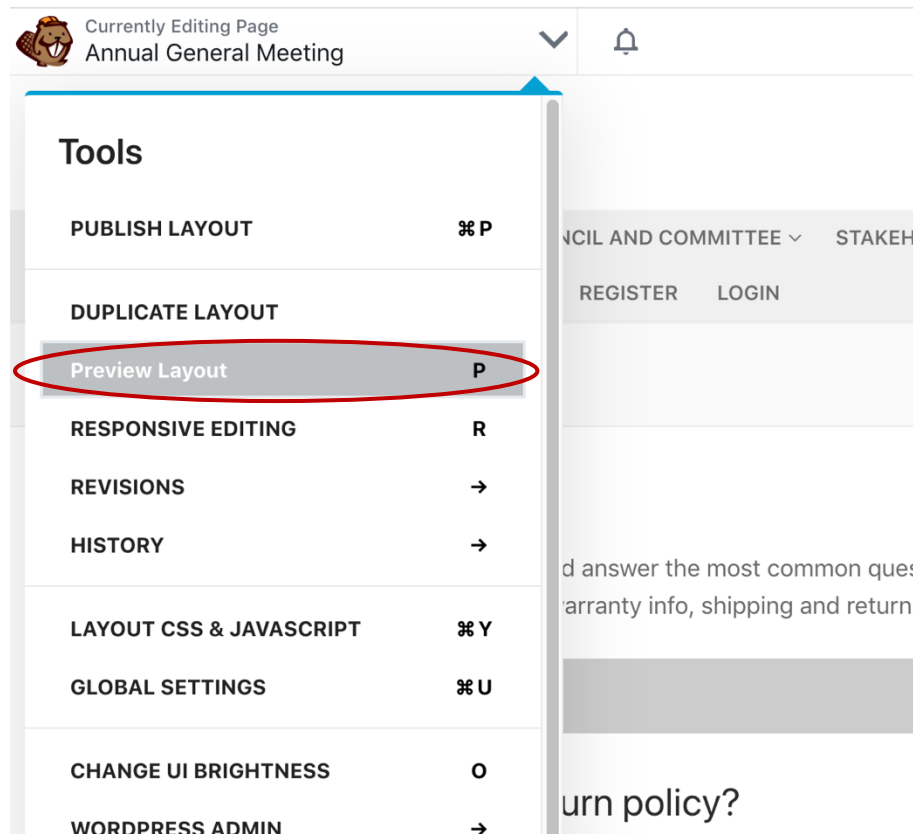
Preview Your Work

When using Beaver Builder editing mode, your page doesn't always reflect what it will look like once it's published. You can preview your work in real time without hitting the **Publish** button to see if you should make some changes. This is a good practice to get into, especially when you are adding code or [shortcodes](#) to your editor.

1. To preview your work, navigate to the top left corner of your page where you see an icon of a beaver, it will say "**Currently Editing Page [name of page]**" with a downward arrow beside it. Click the **arrow**.



2. |



3. To see how it would look on a tablet or a phone, click on the different screen size options on the top left corner. Your preview defaults to desktop screen size. To go back to editing your page, click **Continue Editing**.

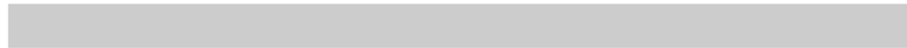
Annual General Meeting

This is where you should answer the most common questions prospective customers might have. It's a good idea to cover things like your return policy, product warranty info, shipping and returns, etc. Check out the examples below.



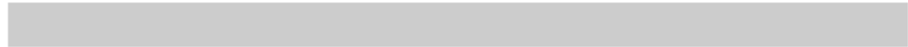
What's your return policy?

Return any of our products--no questions asked--within 30 days of purchase. We even pay return shipping.



Annual General Meeting

This is where you should answer the most common questions prospective customers might have. It's a good idea to cover things like your return policy, product warranty info, shipping and returns, etc. Check out the examples below.



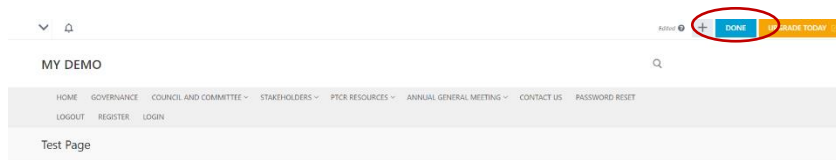
What's your return policy?

Return any of our products--no questions asked--within 30 days of purchase. We even pay return shipping.



Publish

Once you've added all your content, click **Done** and then **Publish** at the top right of the page.



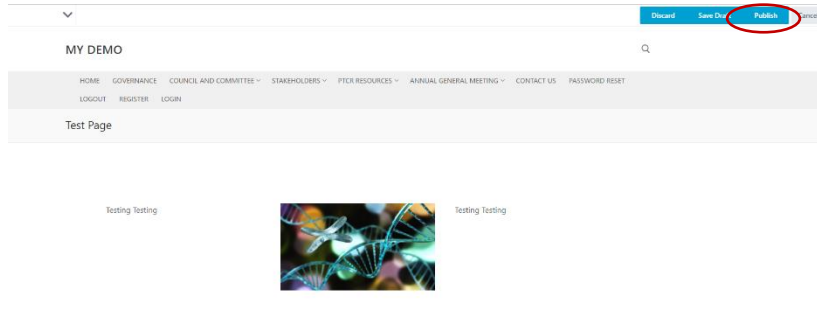
Testing Testing



Testing Testing

Although your WordPress site will automatically save your work on a regular basis, and you will be offered the option to use that version if you like (top of the edit screen for any individual post or page), it is best to use the **Save Draft** or **Publish** button once you are done with your edits. You will also always have the option to **revert to a previously saved version**. Check out [Revisions](#) to learn how.

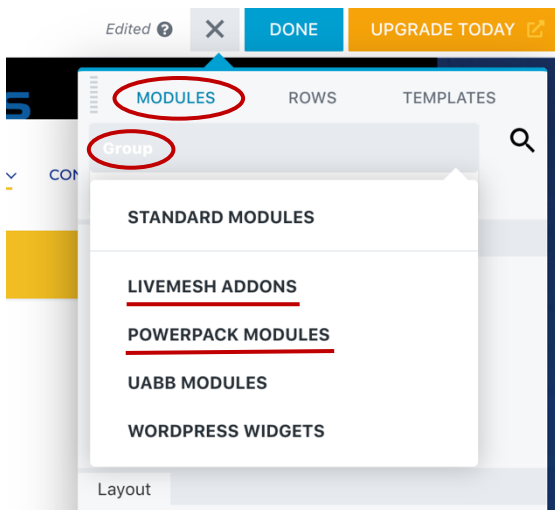
Note: The publish options will differ depending on the role you have been assigned. Authors are not allowed to publish, so they will only be able to save as draft. Learn about the [Roles and Capabilities](#).



Beaver Builder Addons

Using modules within **Beaver Builder** cuts down on time looking for plugins that do the same thing, as well as keep your website loading speed faster.

Once you have installed these two plugins, you can see what they have to offer in the **Beaver Builder** editing options menu under **Modules > Group**.

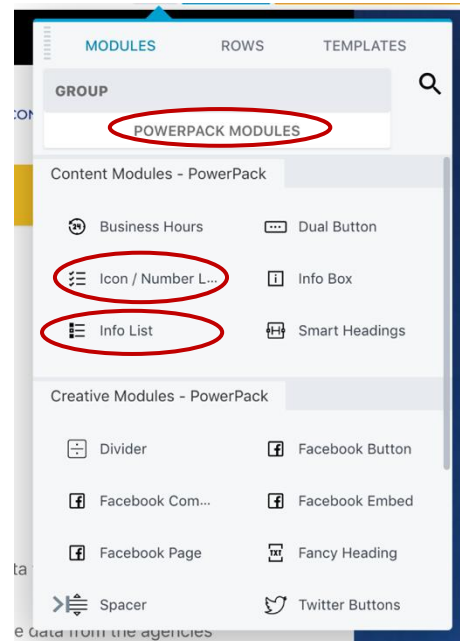
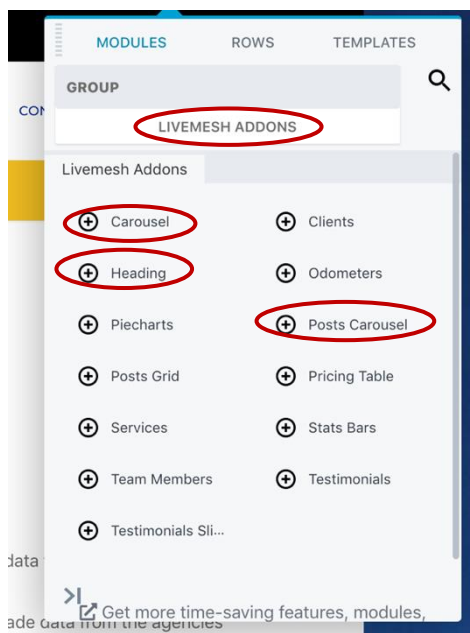


Livemesh Addons

Livemesh Addons has many useful modules for page building. For many of the websites, we have made use of the **Carousel**, **Heading**, and **Posts Carousel** modules (posts carousels may only be used if you have a posts page).

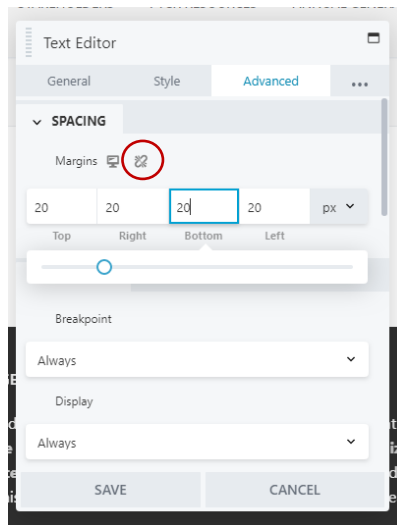
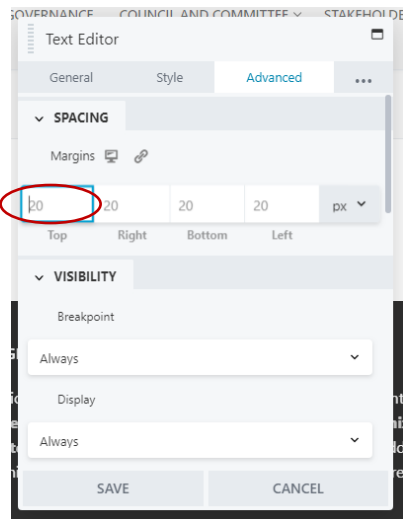
Powerpack Modules

Some useful modules here are **Info List** and **Icon/Number List**.



Adjust Margins

To adjust the **margins** around your content on your page, click the **Advanced** tab and increase or decrease the size by clicking inside a box (top, right, bottom, or left) and shifting the circle on the bar left or right.

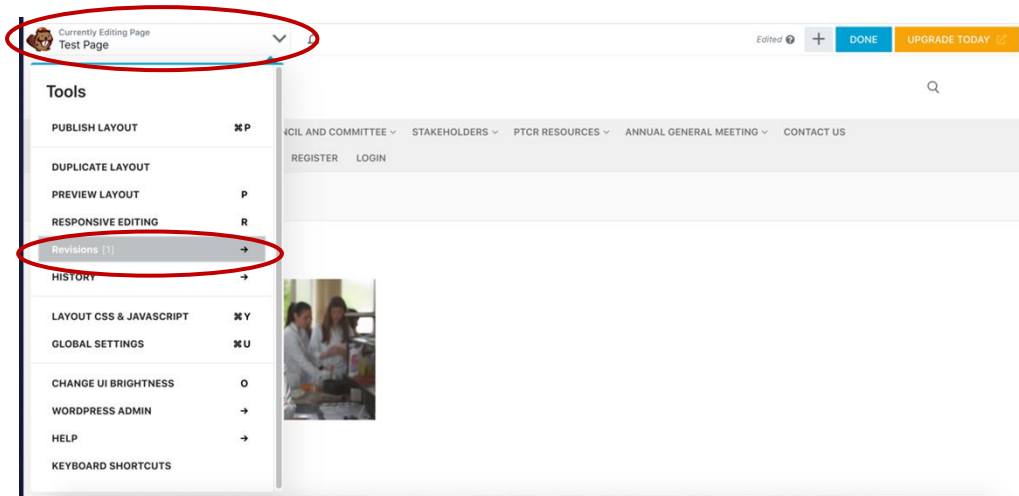


To adjust *all* the margins simultaneously, click on the chain link button.

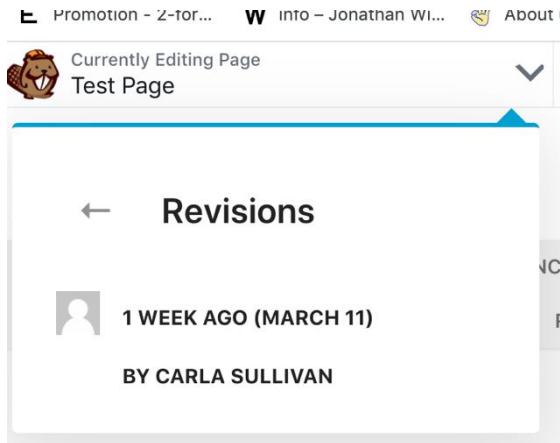
Revisions

To revert to a previously saved version of a page, you must be in the Beaver Builder editor of that page you want to revert.

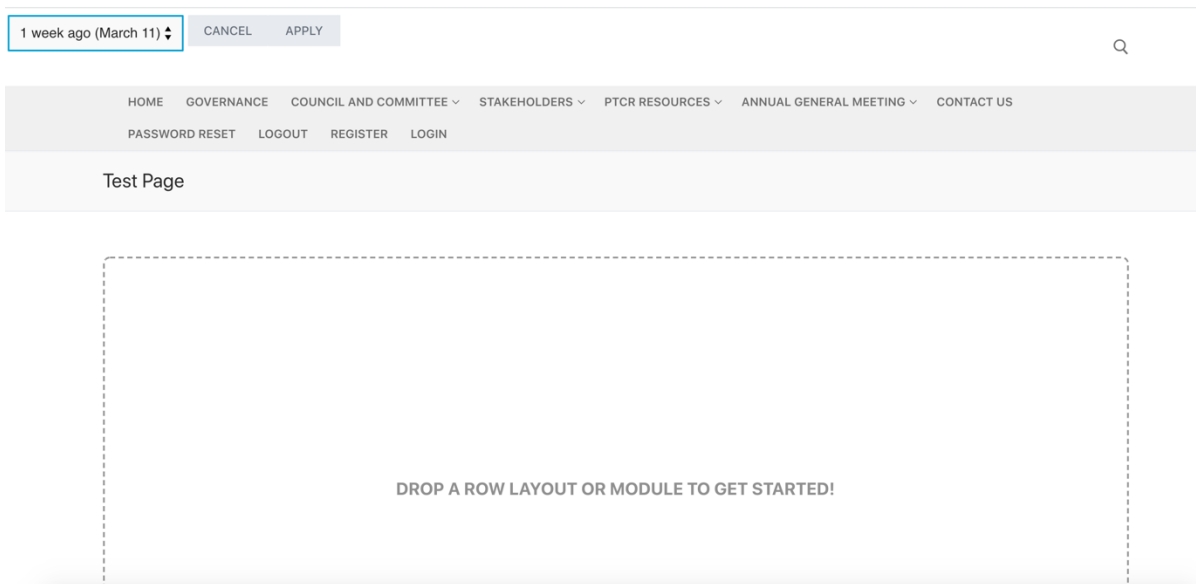
1. Click on the downward arrow beside the Beaver button in the top left corner. Select **Revisions**.



2. A window will pop-up with a list of previously published revisions including the data when they were published and the person who made the changes. Select the revision you would like to view.



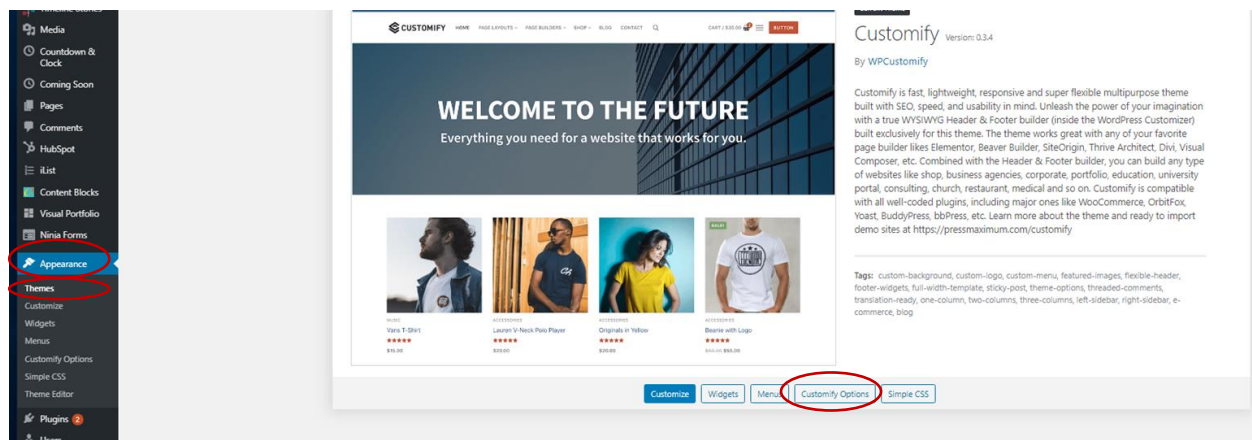
3. If you want to switch your current page to the revision page, select **Apply** and your page will revert to what you selected; otherwise select **Cancel**.



Additional Notes

Themes

Some themes have additional templates that you can use to create pages with additional features or custom layouts. You can see if your current theme has any additional templates by going to **Appearance > Themes** on the Dashboard and selecting the options button (the button name may differ depending on the theme).



Text Editing Tips

Single Spacing

When you use the carriage return (Return or Enter key), generally the formatting of your website will create spacing to exist between your paragraphs. But what if you want to have several rows of text under each other without the spacing, such as with an address? In order to drop down a line without starting a new paragraph, you would use the following keys together: Shift + Enter (or Return). So, you would hold down the Shift key on your keyboard and hit the Enter button (or Return button).

Use the Indent Tool

It is a great tool for formatting by separating out sections of content with ease.

Nested Bullet Lists

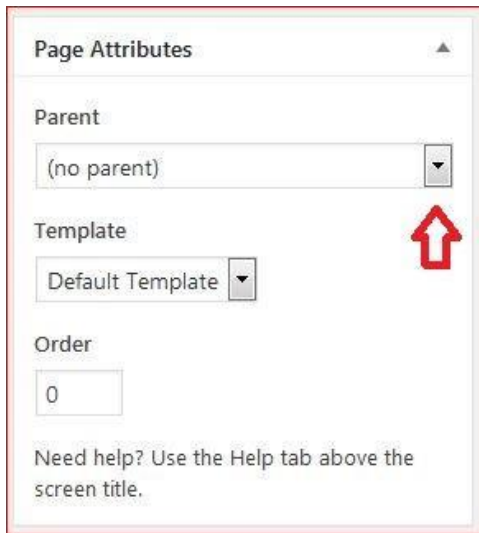
If you want to create a nested bullet list, such as an outline with 1, 2, 3.1, 3.2, 3.3, 4, 5, etc. You would first

1. create your bullet list (see buttons above for ordered list and unordered list – place cursor where you want it, and click the corresponding button);
2. then to create your next level, use the “Indent” button (see buttons above) to create your next level (from 1, 2, 3 to 1, 2, 3.1);
3. when you are ready to move back out to your top level (i.e., from 1, 2, 3.1, 3.2 to 4), hit your Return (or Enter) key twice;
4. and when you are done with your list, you can again hit your return key twice.

Nest a page under a parent

Assigning a Parent to a page has been covered when we went over in Create a Page. The following example is a subject page (e.g. Business) that is a sub-part (or sup-page) of the **Subjects** category.

1. Select the page you want to edit.
2. The controls are present in the right-side of the page editor, under the “**Page Attributes**” section.



Page Attributes

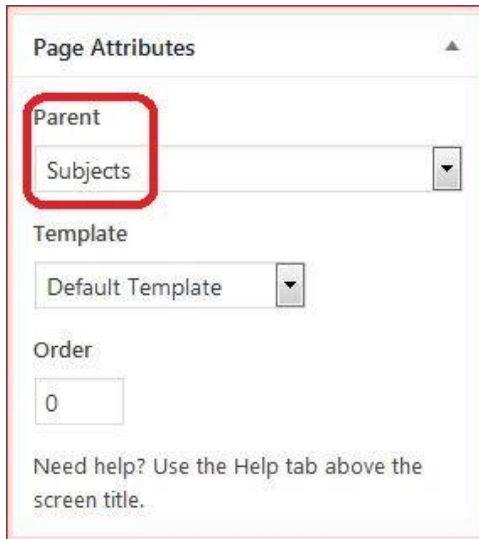
Parent
(no parent) ▼

Template
Default Template ▼

Order
0

Need help? Use the Help tab above the screen title.

3. Select the parent, in this case, "Subjects".



The screenshot shows a 'Page Attributes' panel with a 'Parent' dropdown menu set to 'Subjects'. The 'Parent' label and the dropdown menu are highlighted with a red box. Below the 'Parent' dropdown are fields for 'Template' (set to 'Default Template') and 'Order' (set to '0'). At the bottom, there is a note: 'Need help? Use the Help tab above the screen title.'

The relationship with the parent will be obvious in two locations:

1. In the breadcrumb which will be automatically modified, showing the linked parent before the title of the page;



2. On the page list.



Note: Only pages that are published will appear under **Parent**. Draft pages will not be part of the drop-down menu.

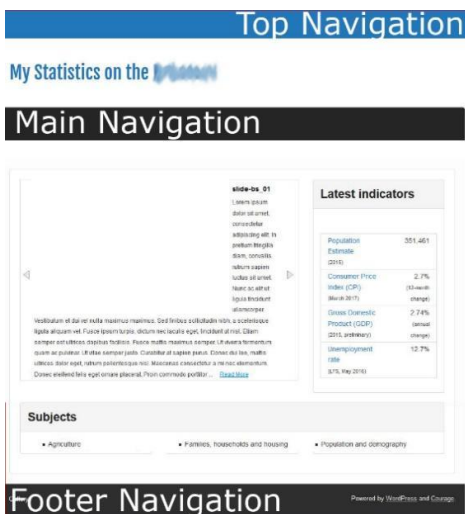
Menus

In WordPress, the choice of the Theme will dictate how many menus are available for the site.

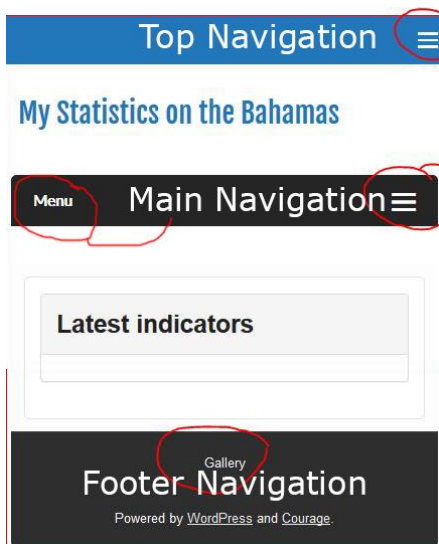
The Courage theme offers four menus:

1. Main Navigation;
2. Top Navigation;
3. Footer Navigation;
4. Social Icons.

Their location is displayed below (not covering Social Icons).



When minimized for smart phone view, The Top Navigation and Main Navigation menus are replaced by an icon, but for the Main Navigation, the word "Menu" is inserted. The Footer Navigation is not compressed.

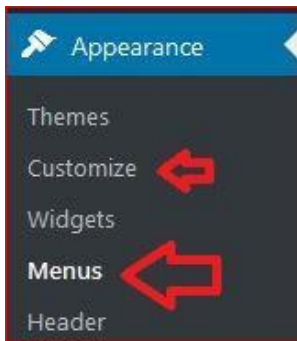


The menu to choose as the predominant is the **Main Navigation** menu: it is close to the content and in mobile view, the word menu will get the user's attention.

Create a menu

There are two ways to access the menu editor, both from the **left menu** under **Appearance**: by clicking on **Customize** or by clicking on **Menus**.

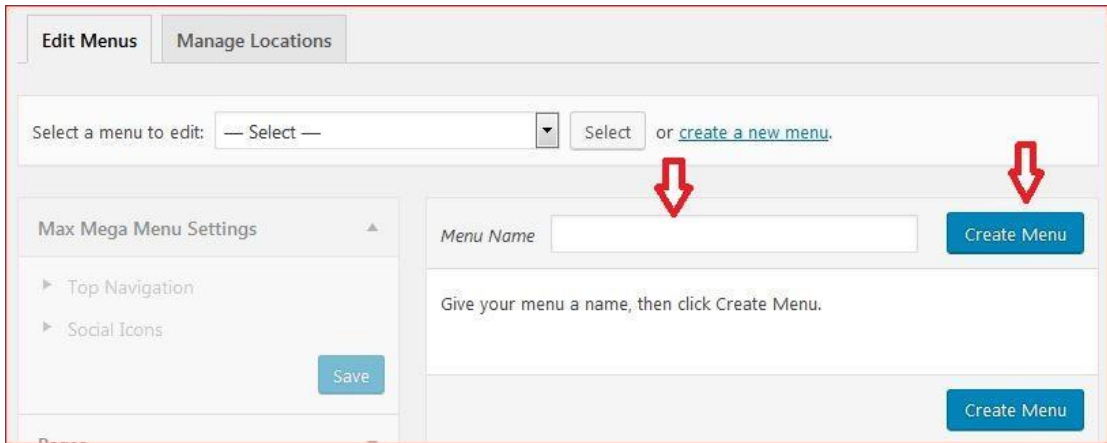
1. Click on "Menus".



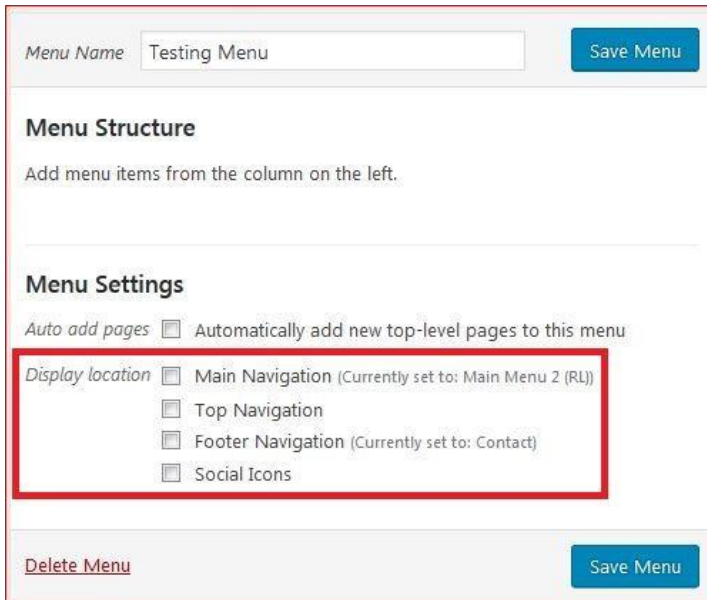
2. On this page, you can edit an existing menu, or you can create a new one. If you want to create a new one, click **Create a new menu**.



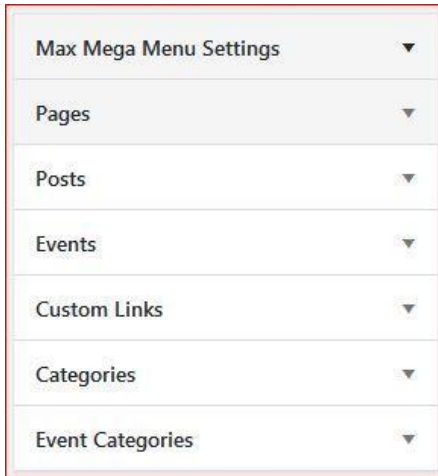
3. Enter the name of the menu to the right of **Menu Name** and then click **Create Menu**. We will use a Test menu for this example.



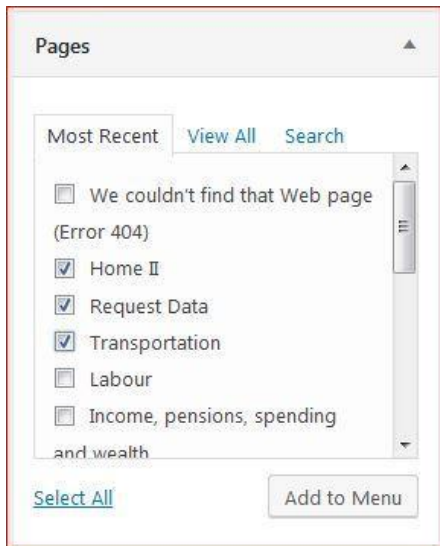
4. Once the menu has been created, a new tab appears called **Manage Locations**. Select **Main Navigation**.



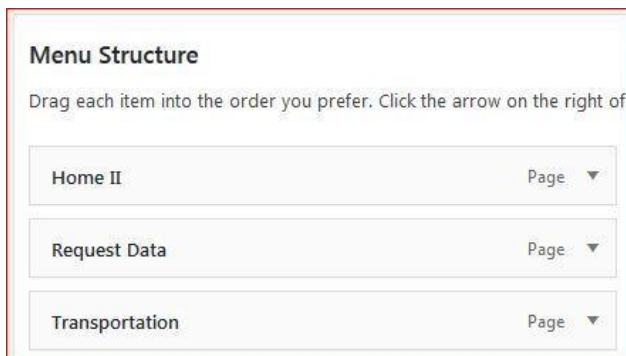
5. Once your selection is made, you must now add content. To do this, you can either expand the **Pages** section or **Custom Links** in the left-part of the page.



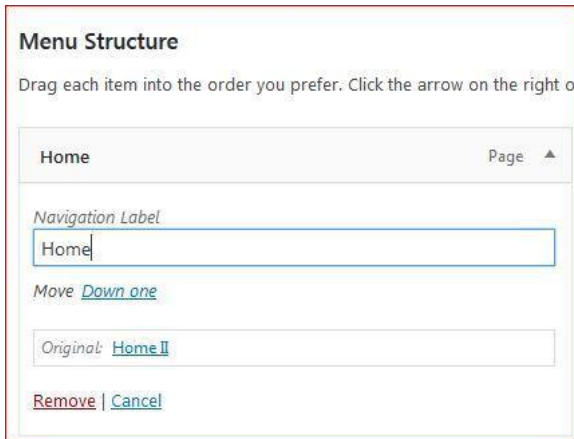
6. Choose which pages to appear in the main menu, then click on the **Add to Menu** button.



7. Once the pages have been added to the menu, they will be present under **Menu Structure** in the central area.



- The page that will be your homepage should be identified as **Home**, but since the system will grab the page title and insert it as the **Navigation Label**, we need to change it from **Home II** to **Home**. To do this, click on the down arrow beside it in the **Menu Structure** section. This will open up a new section which you can use to rename the **Navigation Label** to **Home**. Close this view by clicking on the Up arrow.



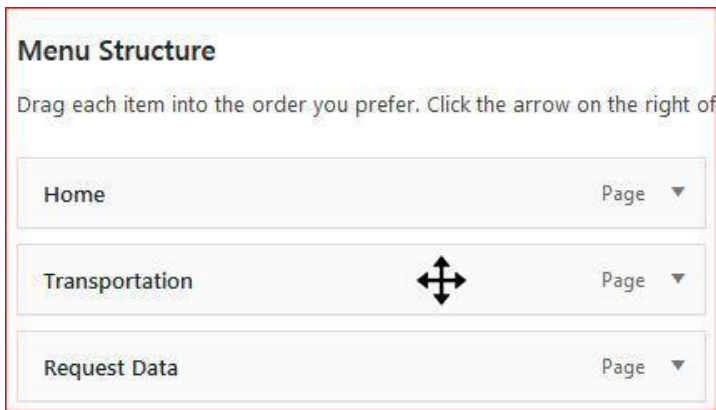
- We are now ready to save the menu and view it on the site. Click on the **Save Menu button** on the right, open your browser and view the website with your new menu. This is what it looks like.



Move menu items

In this example, Transportation should be displayed beside the **Home** button on the site.

- In the **Menu Structure** window, click and drag the menu item. **Transportation** and move it to above **Request Data**. Once you are at the correct spot, let go of your mouse button.



2. Click **Save Menu** and look at the menu in your browser.

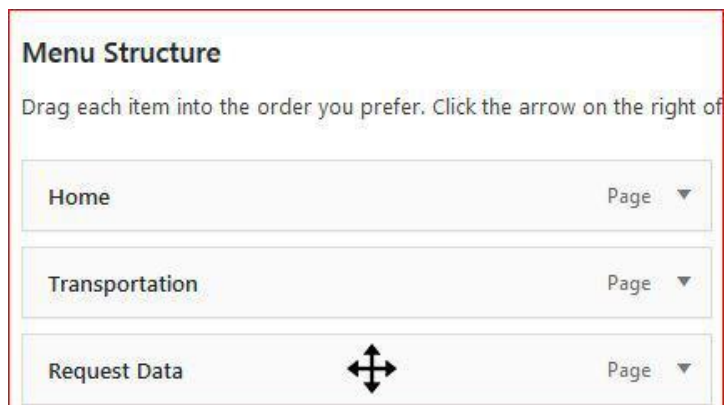


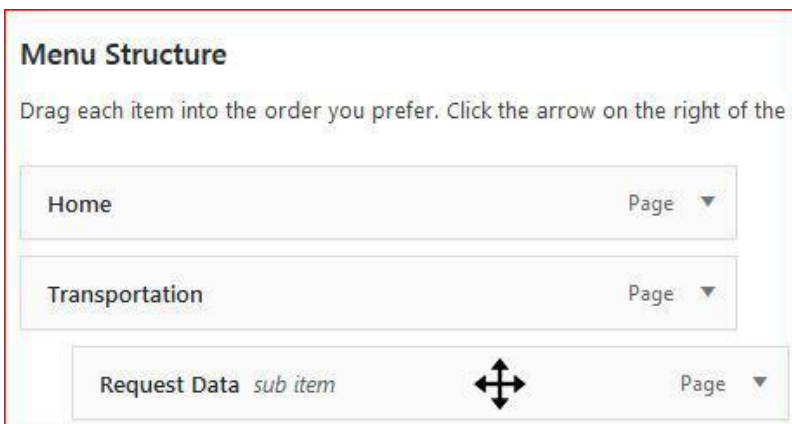
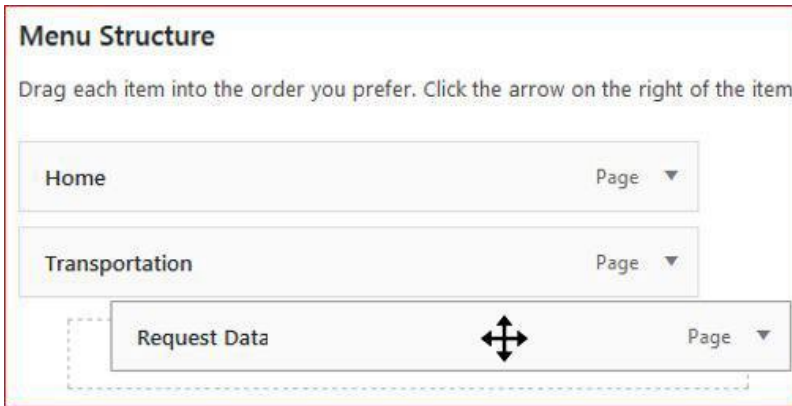
Transportation is now next to the **Home** button.

Nest a menu item under one of the mega-menu buttons

You just found out that **Request Data** should be under the **Transportation** menu item.

1. In the **Menu Structure** window, click and drag **Request Data** and move it to the right. You will notice that a dotted rectangle below will show that the menu item becomes a “sub item”. Once you are at the correct spot, let go of your mouse button.





2. Click **Save Menu** and look at the menu in your browser.

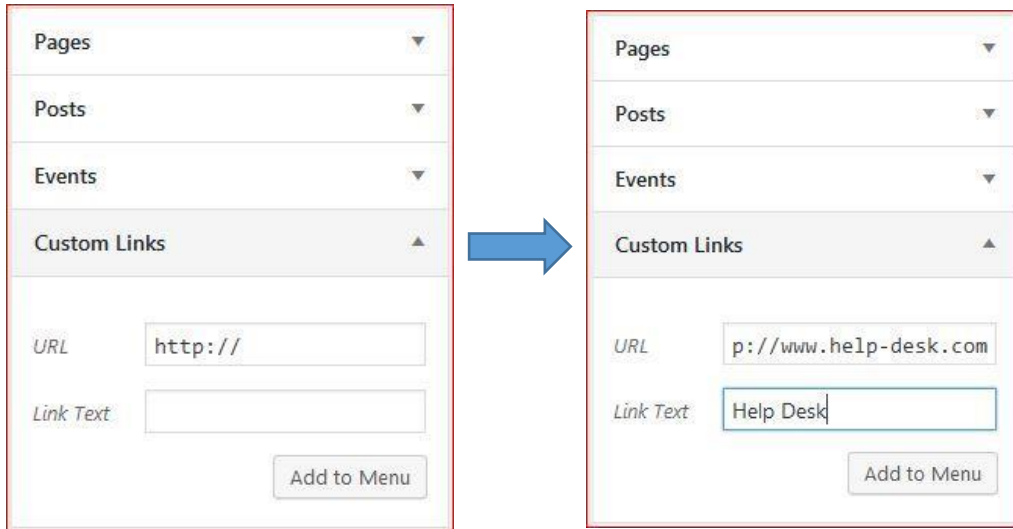


Request Data is now a sub-item of the **Transportation** menu item. You will notice in this case the small “down-arrow” to the right of **Transportation**.

Custom Link in a menu

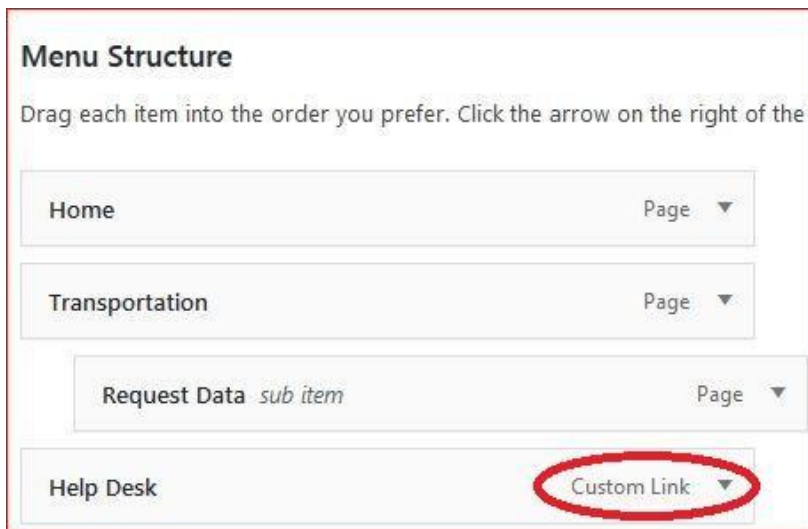
You can also create a **Custom Link** in the menu that will point to a page not residing on your site. This is the main reason why you would use this option.

1. On the left-hand side of the page, expand the **Custom Links** section > enter the URL and the **Link Text** that will be displayed in the menu.



The image shows two side-by-side screenshots of a 'Custom Links' form, connected by a blue arrow pointing from left to right. Both screenshots show a sidebar with 'Pages', 'Posts', 'Events', and 'Custom Links' (expanded). The left screenshot shows the 'URL' field containing 'http://' and the 'Link Text' field empty. The right screenshot shows the 'URL' field containing 'p://www.help-desk.com' and the 'Link Text' field containing 'Help Desk'. Both screenshots have an 'Add to Menu' button at the bottom.

2. Click **Add to Menu**.
3. Once you click on **Add to Menu**, it will be visible in the **Menu Structure** window. This menu item will be identified by **Custom Link** instead of **Page**.



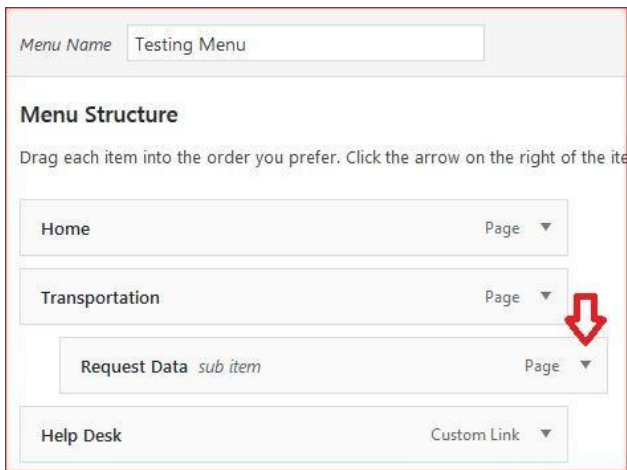
The image shows a 'Menu Structure' window with the following items listed from top to bottom: 'Home' (Page), 'Transportation' (Page), 'Request Data' (sub item, Page), and 'Help Desk' (Custom Link). The 'Custom Link' dropdown for 'Help Desk' is circled in red. The window title is 'Menu Structure' and it includes instructions: 'Drag each item into the order you prefer. Click the arrow on the right of the i'.

4. Click **Save Menu** and view your menu in your browser.

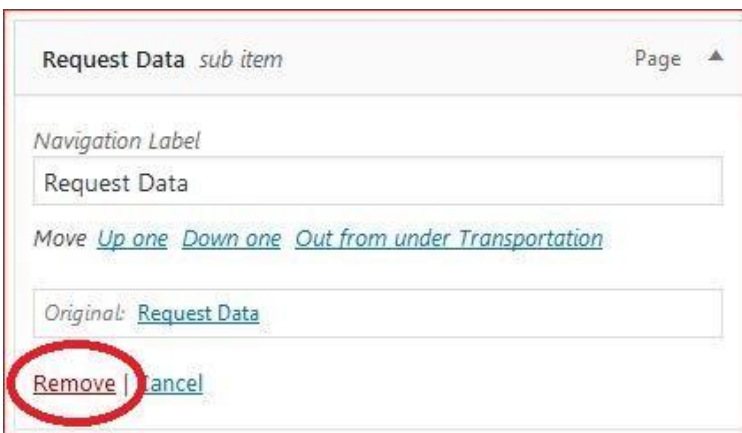


Delete a menu item

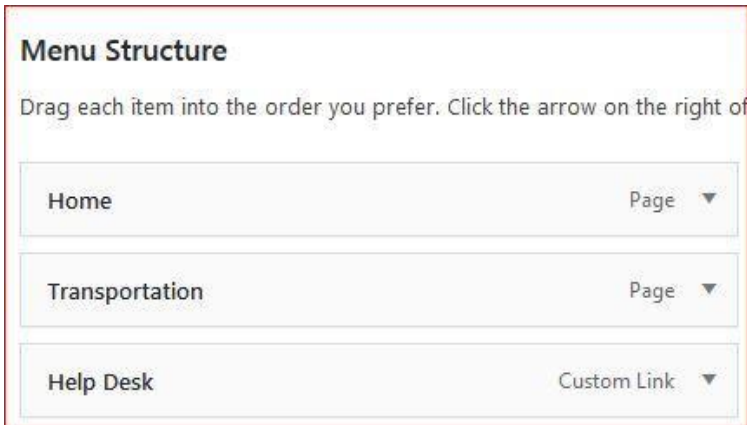
1. In order to be able to delete a menu item, click on the drop-down arrow to expand the item. To illustrate this, we will choose the **Request Data** sub-item.



2. In the **Request Data** sub-item panel, click **Remove**. This will remove the item, but it will NOT delete the element itself. In this case, the page **Request Data** is still on the site, you've simply deleted the menu item.



- Under **Menu Structure**, you will now notice that the **Request Data** sub-item has disappeared.



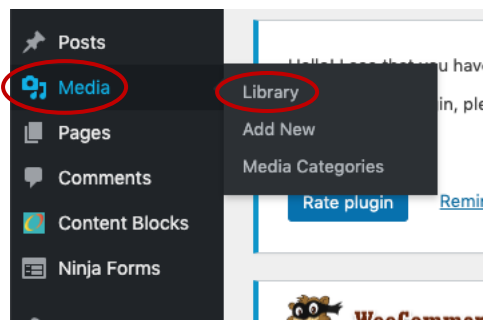
- Your changes will not be effective until you click on **Save Menu**. If you want to abort the deletion, simply leave the page, using the browser back arrow, or by clicking elsewhere in the dashboard. A pop-up window will open, click **Leave Page**.



Media Library

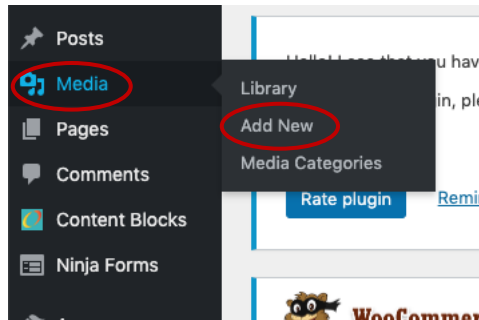
Media is used to manage user uploads (images, audio, video, and other files, such as Word, XLS and PDF documents).

To access all your media, mouse over **Media** in the **Left Sidebar** and select **Library**.

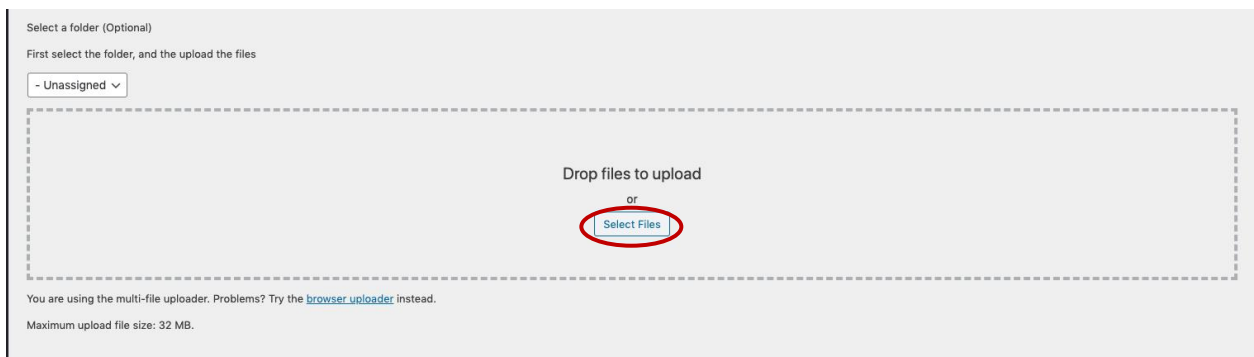


Upload Media

1. To add media to your library, mouse over **Media** and select **Add New**.



2. Click Select Files and load your media file(s).



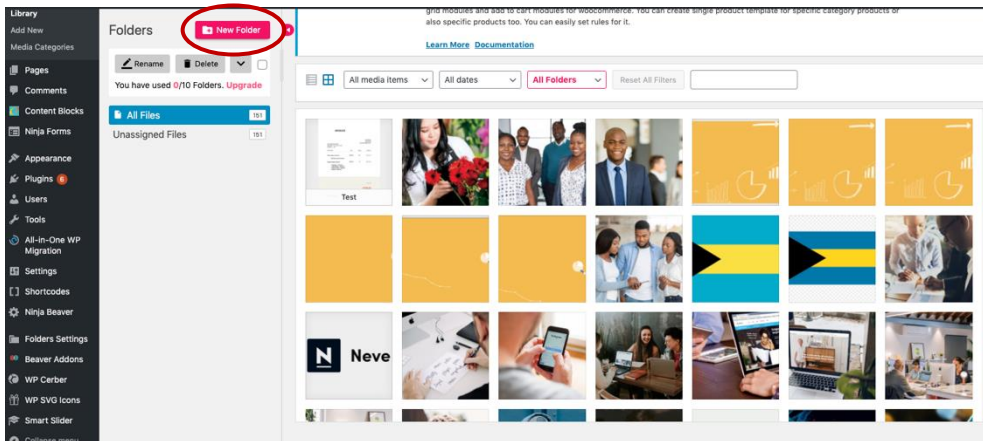
3. Once the media is uploaded, go to the library, and select the file, **Media > Library** to view, **organize** and use it.

Organizing the Media Library

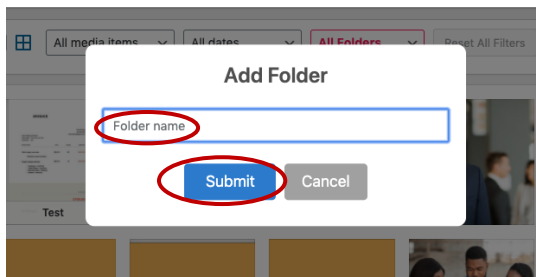
When organizing your **Media Library**, it's important to keep it organized and to follow naming conventions in order to make it searchable, but also to follow best (web) practices.

Already installed on your site are two plugins called **Folders Pro** and **Enhanced Media Library** for managing your media using **categories** and **folders**. As you are creating your site, think about how you would like your files structured, and what categories are most useful for organizing your media. There are many ways to do this, but we suggest creating a folder for each page of your site, as well as an **Images** category and a **PDFs** category.

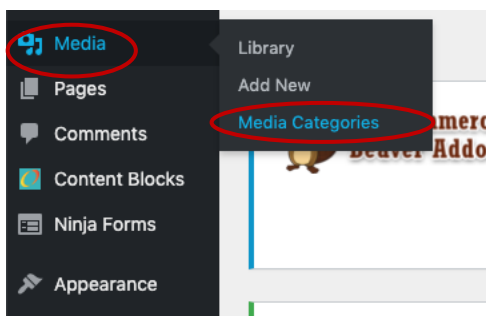
1. Once you have established your file structure, go to your **Media Library**. On the left in the Folders bar, you can create your folders by clicking **New Folder**.



2. Give the folder a name and click **Submit**.



3. Now make your categories. Mouse over **Media** in the Left Sidebar and select **Media Categories**.



4. Under **Add New Media Category**, give your category a name and click **Add new Media Category**. Your new category will show up on the right.

Add New Media Category

Name

The name is how it appears on your site.

Slug

The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.

Parent Media Category

Assign a parent term to create a hierarchy. The term Jazz, for example, would be the parent of Bebop and Big Band.

Description

The description is not prominent by default; however, some themes may show it.

Bulk Actions

Name

No categories found.

Name

Bulk Actions

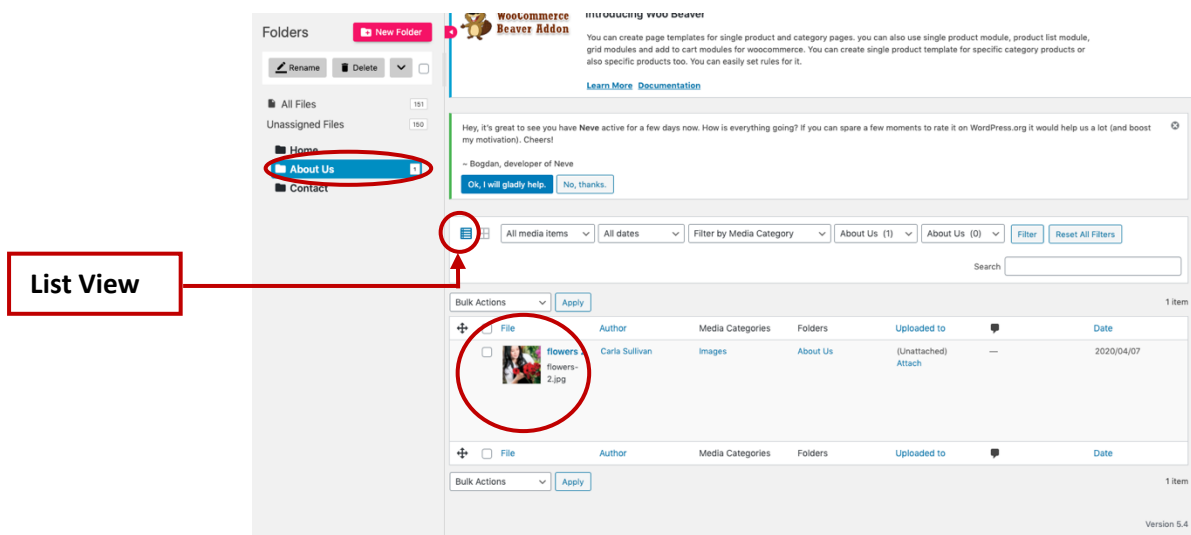
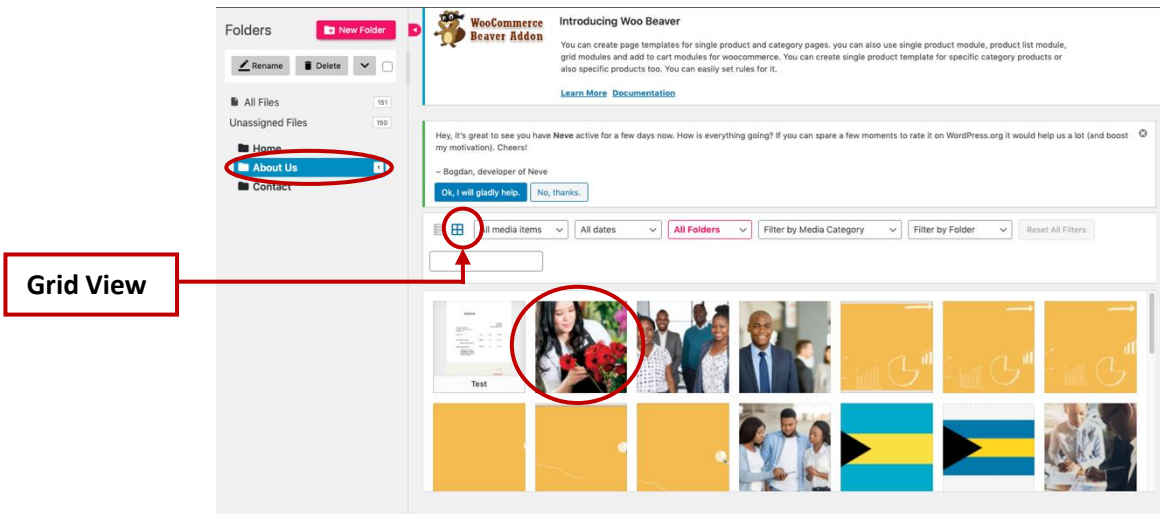
- Go back to your **Media Library (Media > Library)**. Click on a photo and on the right side in the **Attachment Details** bar, check the **Media Category** it belongs to.

The screenshot shows the WordPress Media Library interface. A grid of image thumbnails is displayed. One thumbnail, showing a woman with red flowers, is selected, indicated by a blue checkmark icon in its top-left corner. To the right of the grid is the 'ATTACHMENT DETAILS' panel for the selected image, 'flowers-2.jpg'. In this panel, under the 'Media Categories' section, the 'Images' checkbox is checked and circled in red. Other categories like 'PDFs' are unchecked. The interface also shows a 'Folders' sidebar on the left and a 'Test' block in the main content area.

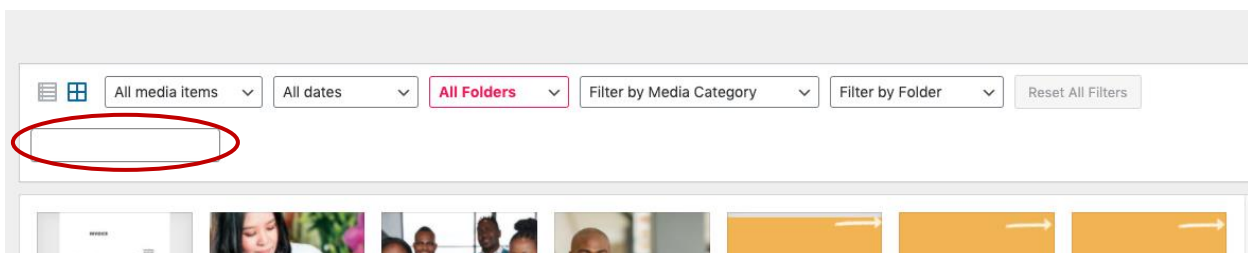
- To add it to a folder, click and drag the checked photo into the folder on the left **Folder bar**. **Tip: Select multiple photos at once.** After clicking the first thumbnail, hold the Control key (Command on Macs), then click the rest of the thumbnails you'd like to select.

This screenshot illustrates the process of moving a media item to a folder. The 'Folders' sidebar on the left is visible, with a 'New Folder' button and a list of folders: 'Home', 'About Us', and 'Contact'. The 'About Us' folder is circled in red, and a red arrow points to it from the main grid. In the main grid, the same 'flowers-2.jpg' image is selected. A red circle highlights the image, and a red arrow indicates it is being dragged towards the 'About Us' folder. The 'Attachment Details' panel on the right shows the 'Images' category checked. At the bottom of the grid, it indicates '1 item selected'.

- To view the items in each folder, you must switch your **Media Library** from **Grid View** to **List View**. When you click a folder in Grid View, it will not work, you will see all the media in the media library.

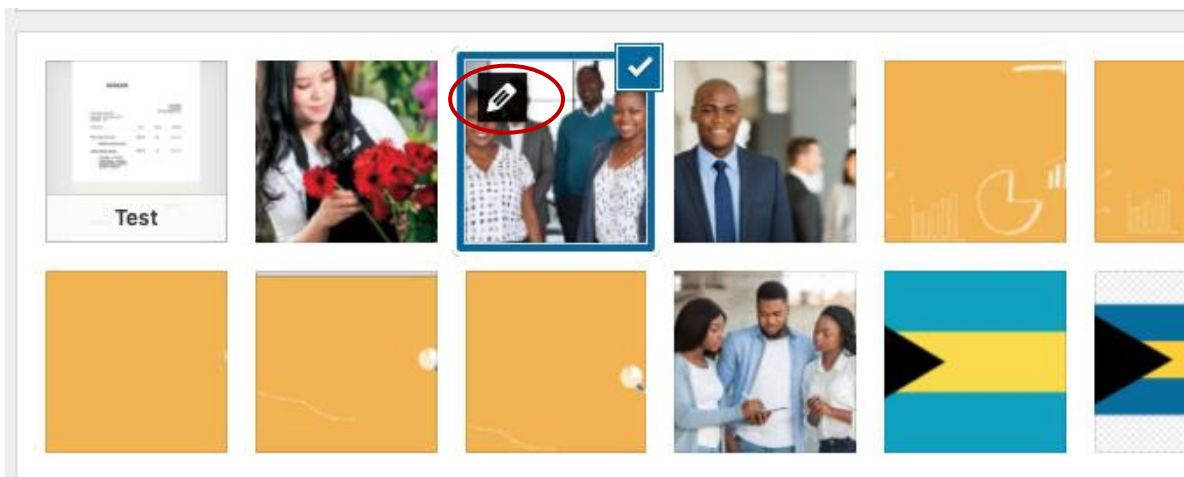
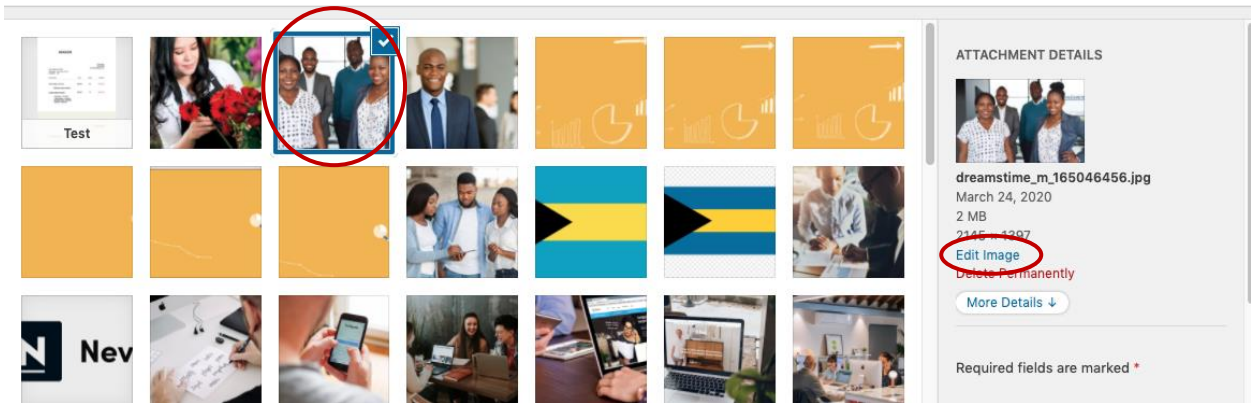


- To search for items in your Media Library, use the search bar. You can search for items by name, author (the person who uploaded it), file type, and folder.

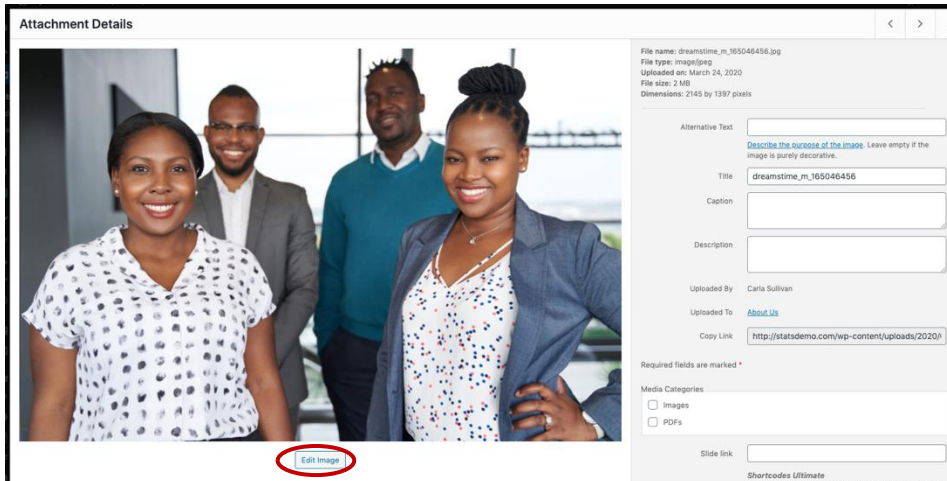


Editing Images using the Media Library

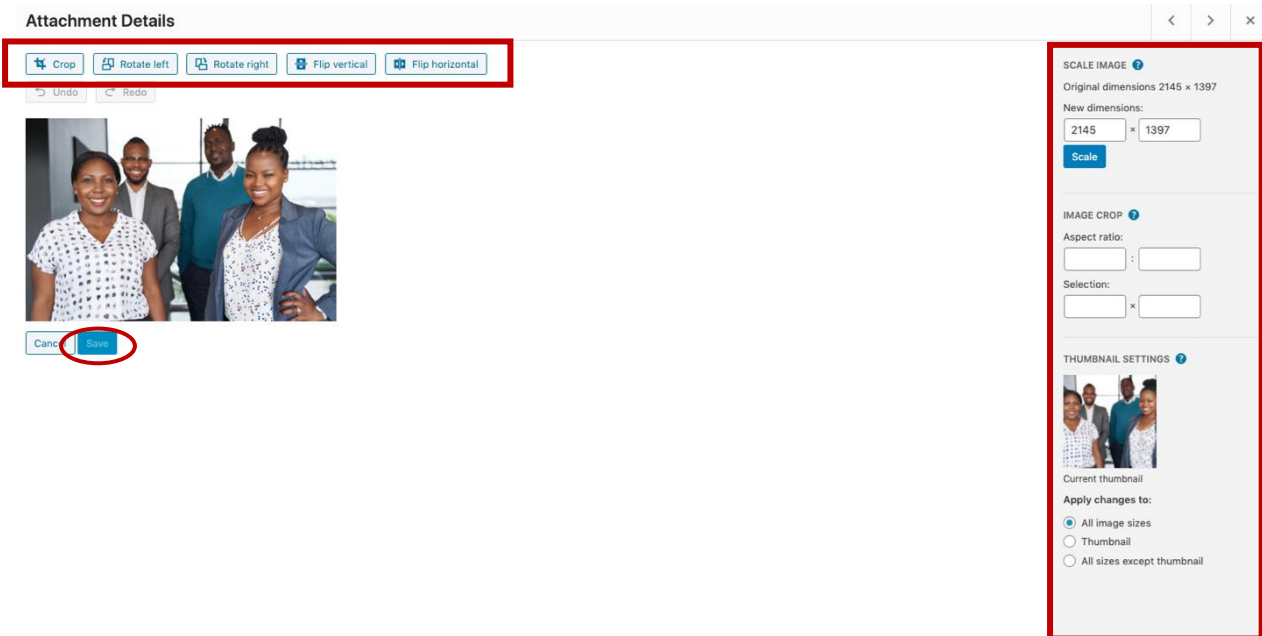
1. When you have a photo selected, the Attachment Details bar shows up on the right. Below the thumbnail of the selected image, you have the option to edit the image. Click **Edit Image**. Alternatively, you can mouse over the selected image and click the **pencil icon**.



2. Click the **Edit Image** button on the image.



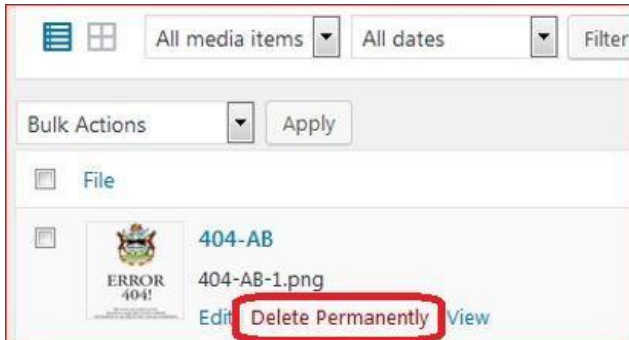
3. You have a few editing options for your image. On the top of the screen you can crop, rotate, and flip your image. On the right of the screen, you can scale your image using dimensions or aspect ratio. When you're done, click **Save**.



Delete a media file

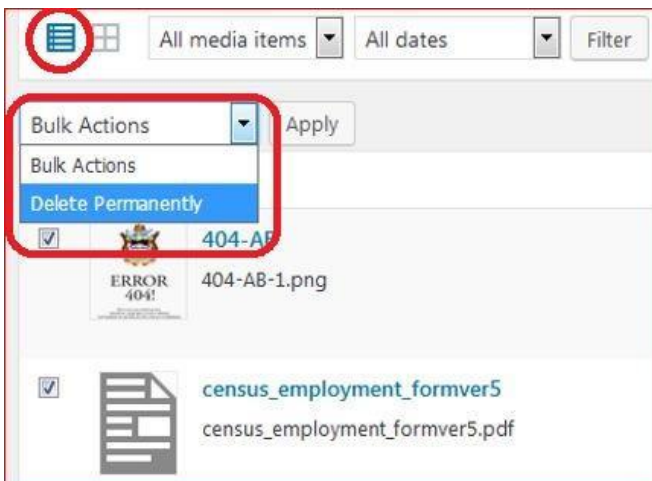
1. **Single file:** To delete any files or uploads from your **Media Library**, mouse over any of the image files that you wish to remove from your library. You will notice that a group of options appear directly under the image title.

Click the **Delete Permanently** option to remove the image. You will receive a confirmation prompt. Click **OK** to confirm the image's deletion.



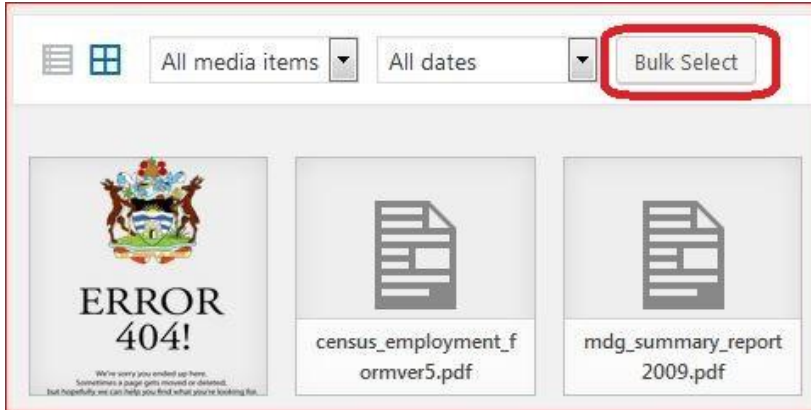
2. **Bulk Deletion:** There is an easy way to remove multiple images from your media library. To do this from **List** view, select the checkbox next to each image that you wish to remove.

Once you have selected all images that you wish to delete, click open the **Bulk Actions** drop-down menu above the file listing. Select **Delete Permanently** and then click the **Apply** button.



You can do the same from **Grid** view, where your **Media Library** is displayed in a gallery of thumbnail images without text.

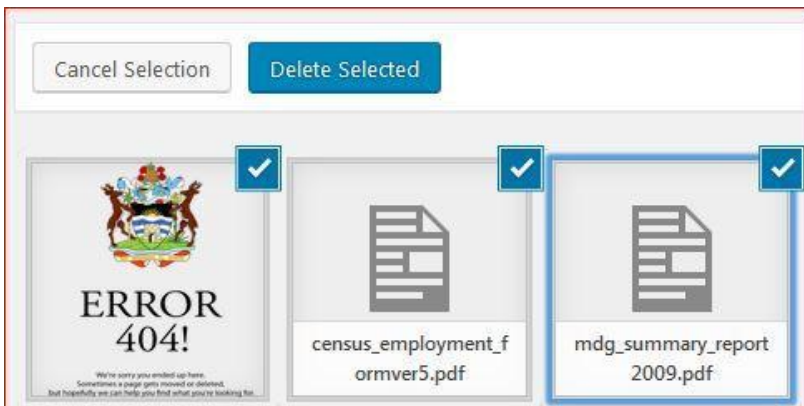
First, click the **Bulk Select** button.



Next, click on one or several images.

Tip: Select multiple photos at once. After clicking the first thumbnail, hold the Control key (Command on Macs), then click the rest of the thumbnails you'd like to delete.

When you're ready to permanently delete the files, click **Delete Selected**, and **OK** when the confirmation prompt appears.



Media File Naming Conventions

By default, the system incorporates the file name into the **Title** box, so rename it properly since this is what will be displayed as text on the link.

ATTACHMENT DETAILS



table_03.jpg
January 26, 2018
34 KB
480 × 480
[Edit Image](#)
[Delete Permanently](#)

URL

 Title

 Caption

 Alt Text

Description



ATTACHMENT DISPLAY SETTINGS

Alignment

Link To

Size

- The **Caption** is the text traditionally displayed underneath the image though the exact placement will vary depending on your theme. The caption is not tied to the attachment post but to where you choose to place the image in a post. That means if you use the same image in several different posts or several different places within a post you can have individual captions for each.
- The alt attribute (in the **Alt Text** box) is the text that displays when an image does not display. The general rule of thumb when applying alt text to an image is to describe in text what the image is communicating.¹¹
- There are specific rules that govern how the alt attribute should be used:
 - If the image has communicative content (either says something or is illustrating something that has relevance to the content on the page) the alt text should describe the content either by repeating the text in the image or describing its content.
 - If the image is wrapped in a link the alt text should describe the target of the link.
 - If the image is purely for decoration and has no communicative value, the alt tag can be left blank (alt="")

People often think that the alt text is for visitors with accessibility issues. That is true, but it's just part of the story: The alt text is there to describe image content and relate it to your overall content. While most visitors don't see the alt text, search engines do, and they index the images based on them. And as

we move into a world of wearable devices that don't always show images the alt text will become more important than ever before.

Bottom line: Always describe your images in the alt text field unless they are purely for decoration.

- The **Description** field is probably the best kept secret of images in WordPress. If you add text to the description field, that text will be stored as post content for the attachment post. For our example, we will type "Round solid-maple table with 3 chairs for sale. They are located in the dining area of a kitchen. They are for sale."
- At the bottom of this panel, you could choose an alignment, insert a link on the image or modify the size. Because our image had a 1 x 1 size ratio, we could select a smaller size. In other cases, if the image's width is greater than its height, the predetermined sizes would distort your image. Use with care. We will leave it at its original size.
- Once you are done, click on the **Insert into page** button.

Google Analytics

Google analytics is a great tool for tracking and reporting traffic on your website. In order to use google analytics for your website, you will need to create an email account with google and install the Analytify plugin onto your WordPress site.

For a basic overview of how to use and understand the tool, follow this free course [course](#).

SEO

Search Engine Optimization (SEO) is the process used to improve a website's ranking during a (google) search.

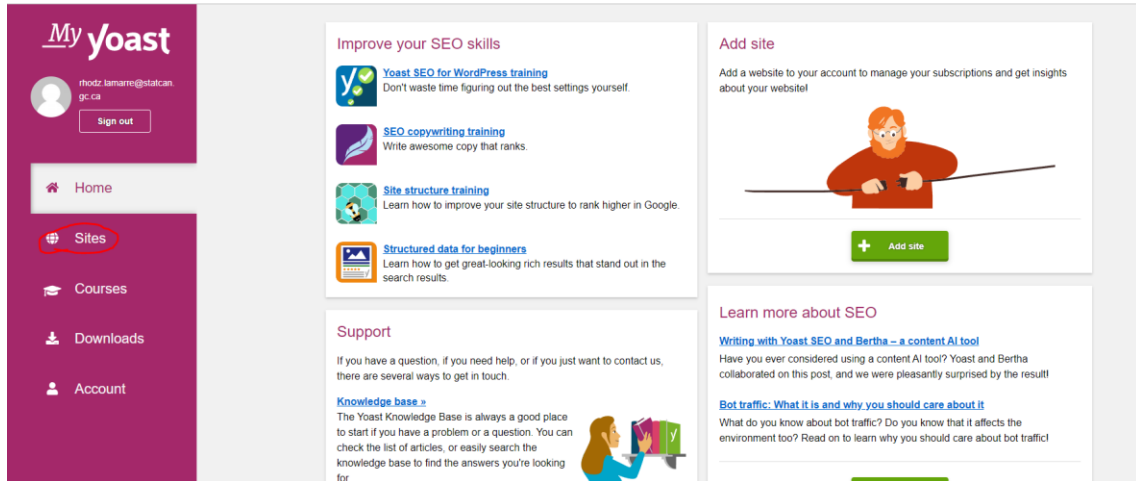
Installing Yoast SEO plugin - Premium version

Before you begin the steps:

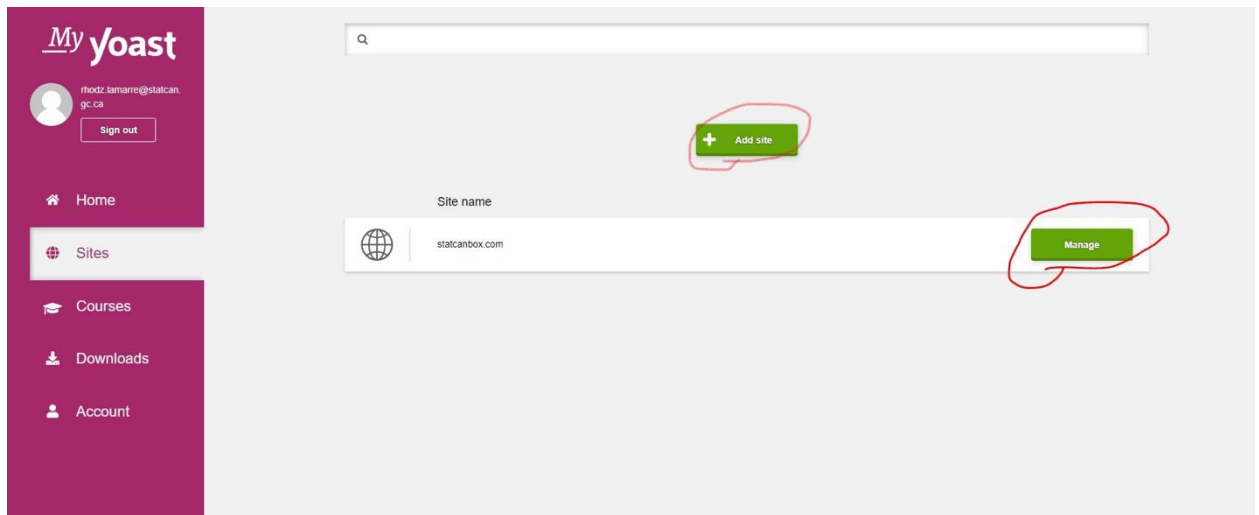
- Log into your Yoast premium account from <https://my.yoast.com/>.
- Log into your WordPress site.

1. Install the free Yoast SEO plugin on your WordPress site.

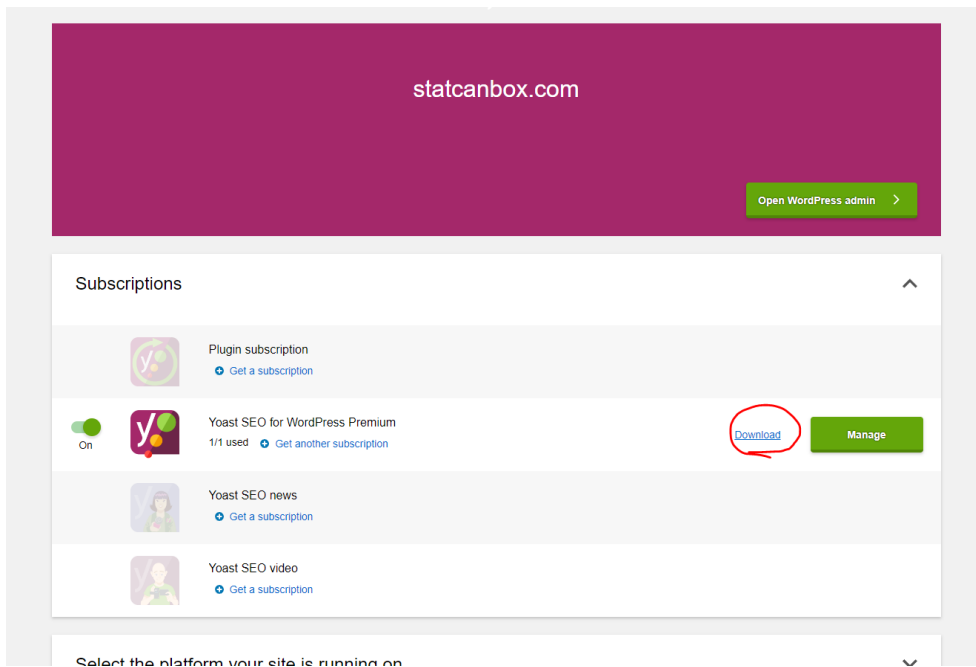
2. On the homepage of your Yoast account, click on **Sites**, located on the menu on the left.



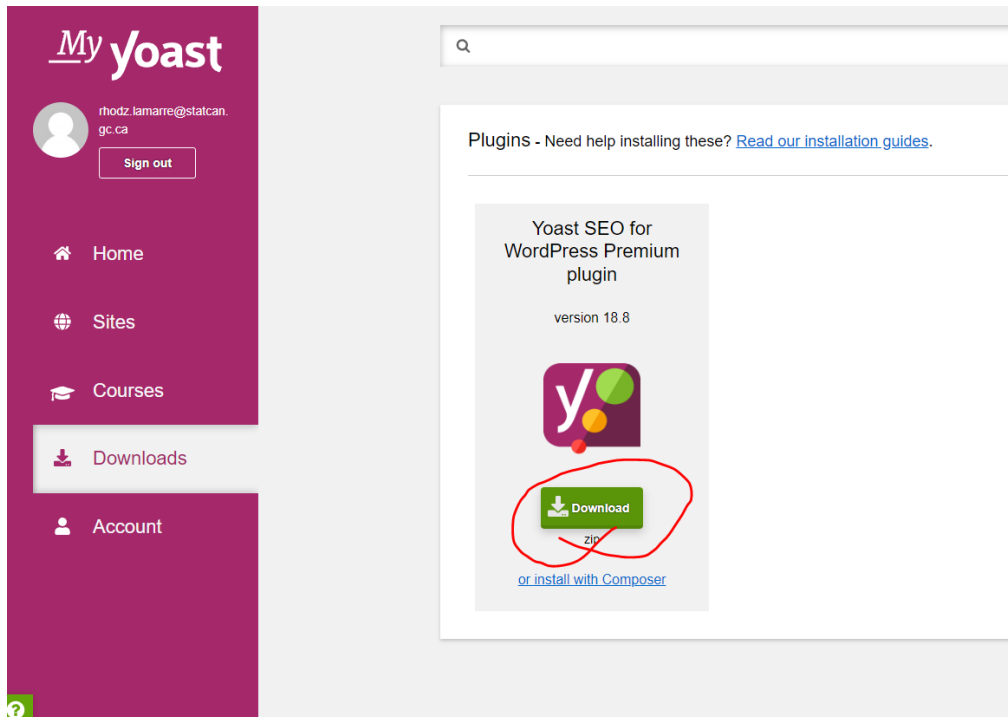
3. You will be directed to the page displayed below. Click the **Add Site**, type the URL of your website and select the platform that your website is running on (WordPress). Your site will then appear as shown below. Click **Manage**.



4. You will be directed to the page below. Click on the download link for **Yoast SEO for WordPress Premium**.



5. Click the **Download** button and a zip file will be downloaded.

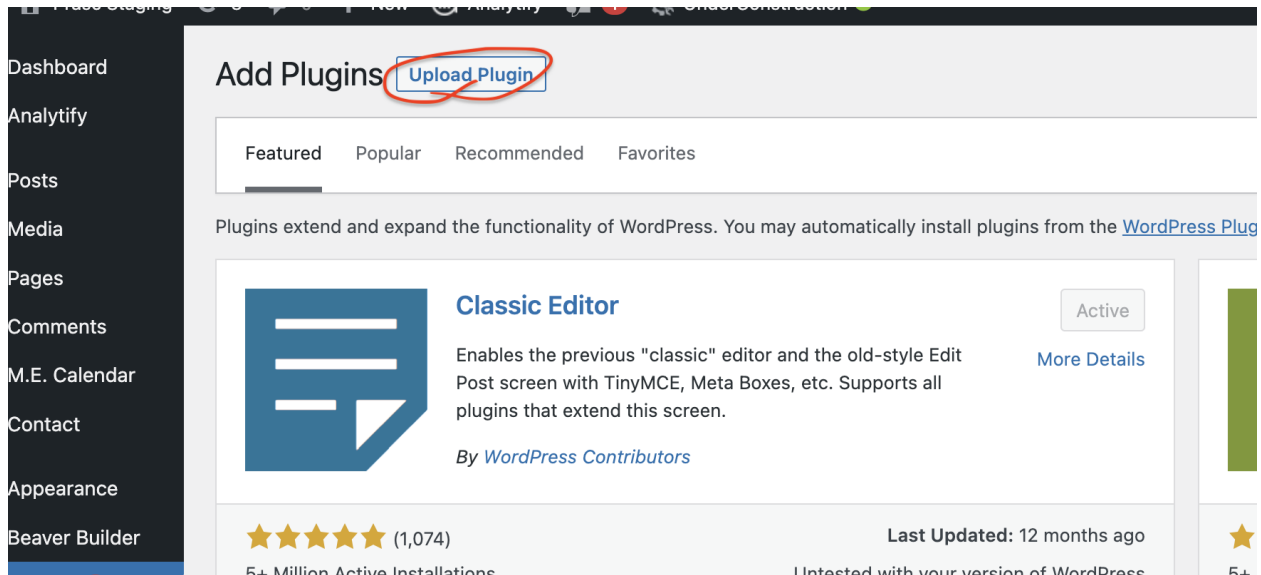


6. Save the zip file in a folder on your computer that you can easily access.
7. Go to your WordPress dashboard. Go to **Plugins** in the **Left Sidebar** and click **Add New**.

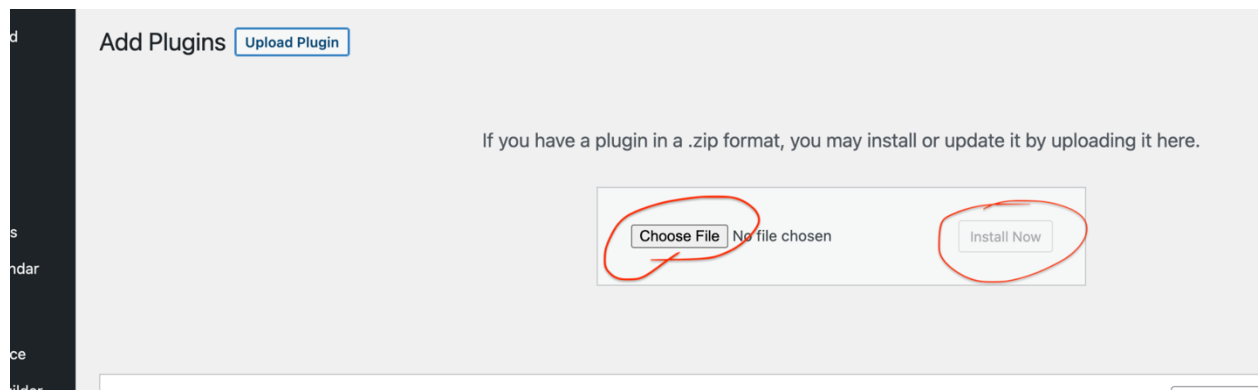
The screenshot shows the WordPress dashboard for 'Prasc Staging'. The top navigation bar includes 'Prasc Staging', '3' refreshes, '0' notifications, '+ New', 'Analytify', '1' notification, and 'UnderConstruction' status. The left sidebar contains menu items: Dashboard, Analytify, Posts, Media, Pages, Comments, M.E. Calendar, Contact, Appearance, Beaver Builder, **Plugins** (with a red circle and '3' notifications), Installed Plugins, Add New, Plugin File Editor, and Users. The main content area is titled 'Plugins' with an 'Add New' button highlighted by a red underline. Below the title is a green notification box asking about 'PowerPack Lite for Beaver Builder'. A red-bordered warning box states: 'Huge SEO Issue: You're blocking access to robots. If you want search engines to: [I don't want this site to show in the search results.](#)'. Below the warning, there are filters: 'All (35) | Active (28) | Inactive (7) | Recently Active (1) | Update Available (3) | Mus'. A 'Bulk actions' dropdown and an 'Apply' button are present. The plugin list table has columns for 'Plugin' and 'Description'. The visible rows are:

<input type="checkbox"/>	Plugin	Description
<input type="checkbox"/>	404page - your smart custom 404 error page Activate Delete	Custom 404 the ea Version 11.3.1 By F
<input type="checkbox"/>	All-in-One WP Migration Deactivate	Migration tool for a Version 7.62 By Se
<input type="checkbox"/>	All-in-One WP Migration Unlimited Extension Deactivate	Extension for All-in Version 2.46 By S

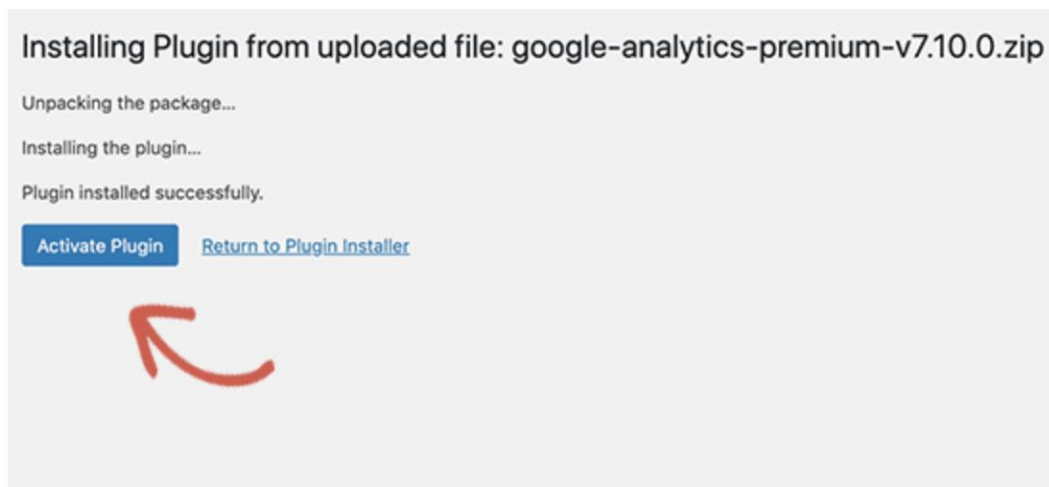
8. Click **Upload Plugin**.



9. Click on **Choose File** and upload the zip file that you downloaded from your Yoast premium account onto your computer. After the zip file has uploaded successfully, click on **Install Now**.



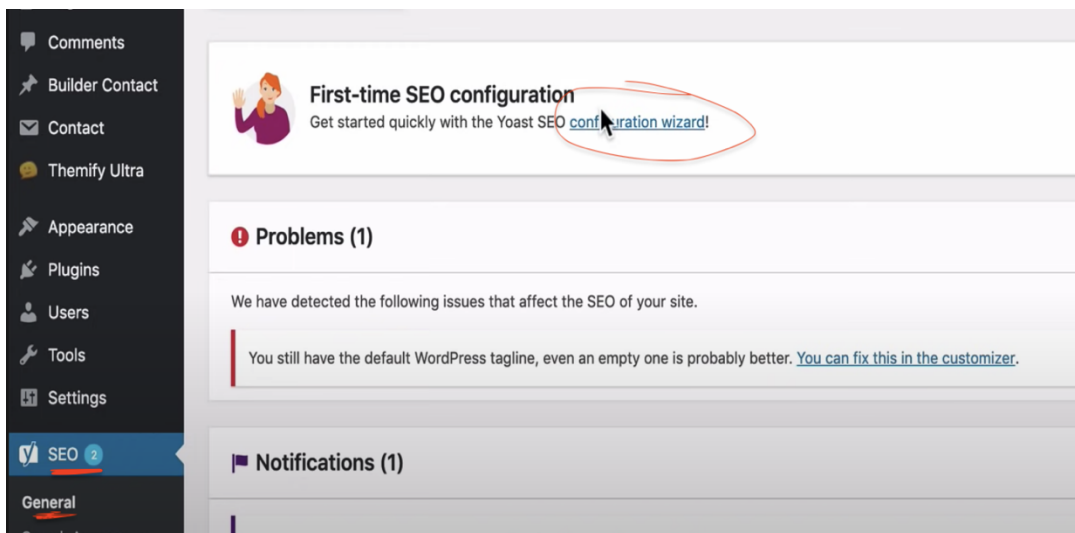
- WordPress will now upload the plugin file from your computer and install it for you. You will see a success message once the installation is finished. Click **Activate Plugin**.



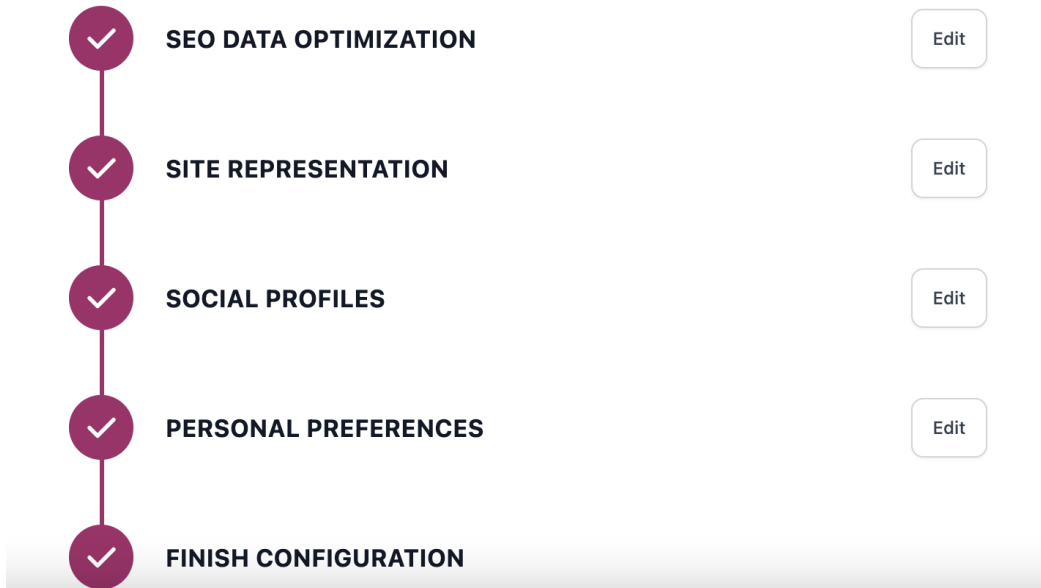
Configuring the Yoast SEO plugin

Before using the Yoast SEO you must configure the wizard. You only need to do this once, and then you're all set.

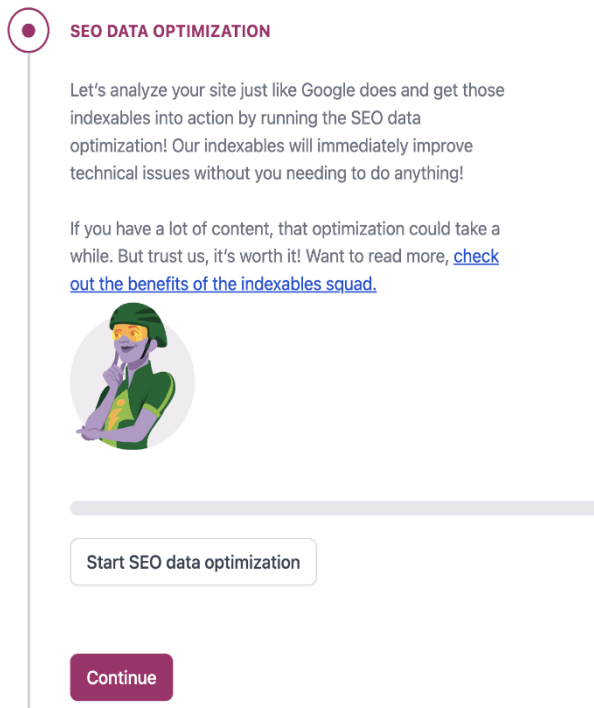
- On the Left Side Sidebar of your dashboard, mouse over **Yoast SEO** and click on **General**.



- You will need to fill in the requested information within these five options which will help the web pages be indexable. It is important to make your web pages indexable if you want people to find them through search engines.



- Click **Edit** beside **SEO Data Optimization** and it will display as shown below. Click **Start SEO data Optimization > Continue**. **Note:** you can click continue when the loading bar is still filling up.

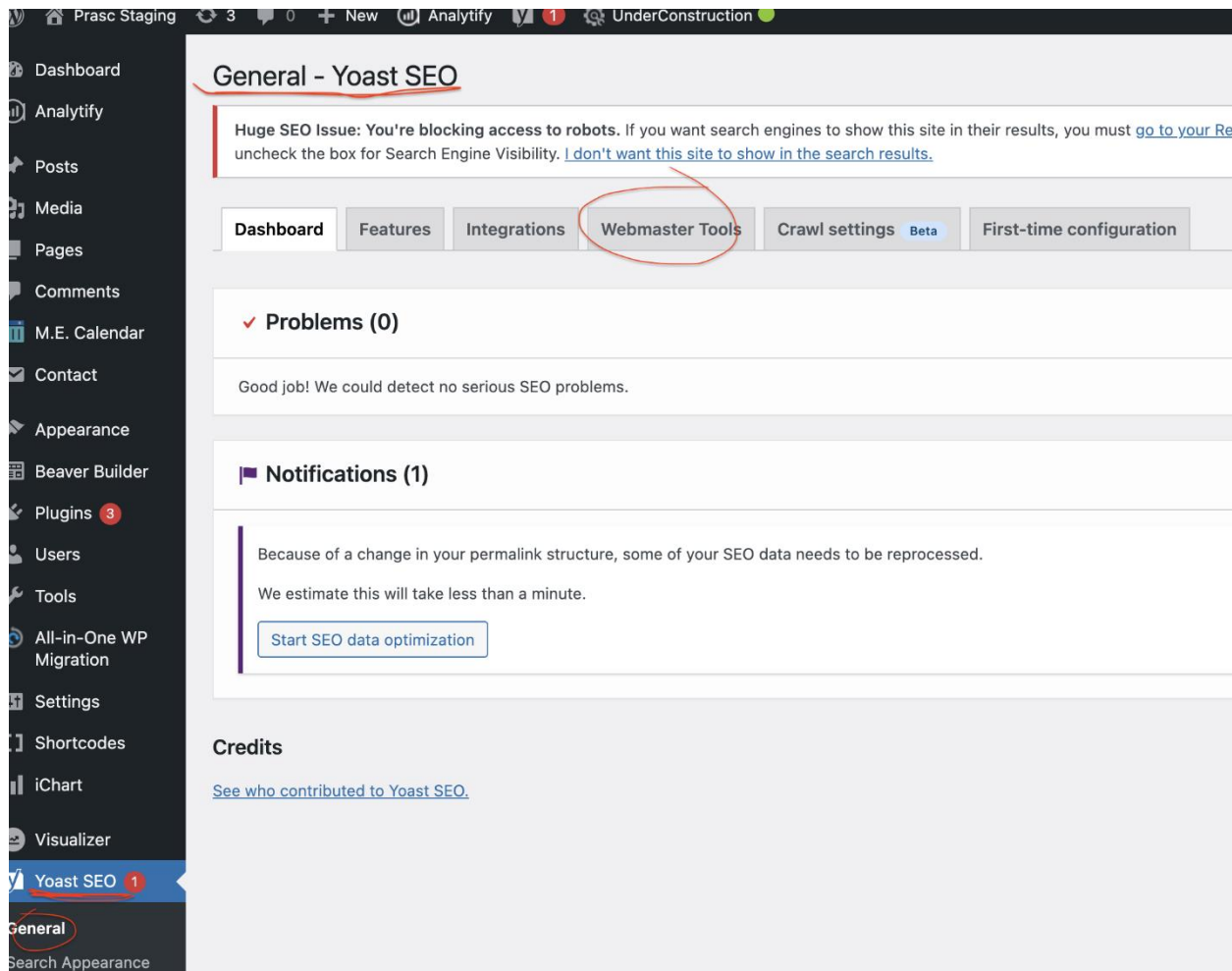


4. Repeat this step on the options displayed above, that is, **Site Representation**, **Social Profiles**, **Personal Preferences** and **Finish Configuration**. Click on the **Edit** button beside each option and input the requested data.

Connect Yoast to Google Search Console

The Yoast SEO dashboard integrates Google Search Console, a must-tool for site owners. It provides you with information about the health of your site.

1. From the Yoast general dashboard, click on **Webmaster Tools**.



The screenshot shows the Yoast SEO dashboard interface. The left sidebar contains a list of menu items: Dashboard, Analytify, Posts, Media, Pages, Comments, M.E. Calendar, Contact, Appearance, Beaver Builder, Plugins (3), Users, Tools, All-in-One WP Migration, Settings, Shortcodes, iChart, Visualizer, Yoast SEO (1), General, and Search Appearance. The 'Yoast SEO' and 'General' items are circled in red. The main content area is titled 'General - Yoast SEO' and features a navigation bar with tabs: Dashboard, Features, Integrations, Webmaster Tools (circled in red), Crawl settings (Beta), and First-time configuration. Below the navigation bar, there are three sections: 'Problems (0)' with a green checkmark and the message 'Good job! We could detect no serious SEO problems.'; 'Notifications (1)' with a purple square icon and a message about permalink structure changes, including a 'Start SEO data optimization' button; and 'Credits' with a link to 'See who contributed to Yoast SEO.'

2. Click on the **Google Search Console**.

The screenshot shows the 'Webmaster Tools verification' section of the Google Search Console interface. It features a navigation bar with tabs for 'Dashboard', 'Features', 'Integrations', 'Webmaster Tools' (which is selected), 'Crawl settings Beta', and 'First-time config'. Below the navigation bar, there are four verification code input fields: 'Baidu verification code', 'Bing verification code', 'Google verification code', and 'Yandex verification code'. The 'Google verification code' field is pre-filled with the code 'Xrz-HLQVNwIFJtoDWrB7Rqfa3ViBF-DUUnu4_aLxC7A0'. A red circle highlights the text 'Google Search Console' in the instruction 'Get your Google verification code in Google Search Console.' below the Google code field.

3. The link will take you to a new page. Select the **HTML tag** option and copy the link that is displayed. Go back to the Yoast SEO general dashboard page, keep this page open.

The screenshot shows the 'Webmaster Central' page for the domain 'https://statcanbox.com/'. At the top, there is a red warning icon and the text: 'Verification failed for https://statcanbox.com/ using the Meta tag method (1 day ago). We couldn't find the verification meta tag. Verify your ownership of https://statcanbox.com/. Learn more.' Below this, it states: 'Your Google Account will be recorded in Google's systems as an official owner of this property. Note - your ownership information will be stored and be visible to other owners (both current and future).' There are three tabs: 'Recommended method', 'Alternate methods' (which is selected), and 'History'. Under the 'Alternate methods' tab, the 'HTML tag' option is selected and highlighted with a red circle. It includes the instruction: 'Add a meta tag to your site's home page.' and a numbered list: '1. Copy the meta tag below, and paste it into your site's home page. It should go in the <head> section, before the first <body> section.' Below this is a code block with a 'Copy' button and a red arrow pointing to the code: `<meta name="google-site-verification" content="Xrz-HLQVNwIFJtoDWrB7Rqfa3ViBF-DUUnu4_aLxC7A0" />`. There is also a link 'Show me an example'. The second step in the list is: '2. Click Verify below.' and a note: 'To stay verified, don't remove the meta tag, even after verification succeeds.' At the bottom, there are three radio button options: 'HTML file upload' (selected), 'Google Analytics', and 'Google Tag Manager'. At the very bottom, there are two buttons: 'VERIFY' (in red) and 'Not now'.

4. Paste the link into the **Google Verification Link** text area.

Dashboard Features Integrations **Webmaster Tools** Crawl settings Beta First-time config

Webmaster Tools verification ?

Baidu verification code

Get your Baidu verification code in [Baidu Webmaster Tools](#).

Bing verification code

Get your Bing verification code in [Bing Webmaster Tools](#).

Google verification code

Get your Google verification code in [Google Search Console](#).

Yandex verification code

Get your Yandex verification code in [Yandex Webmaster Tools](#).

5. Go back to the page of the **Google Search Console** link and click **Verify**.

The screenshot shows the Google Search Console Webmaster Central interface. At the top, the Google logo is on the left, and the text "Webmaster Central" is in the center. Below this, a red error message states: "Verification failed for https://statcanbox.com/ using the Meta tag method (1 day ago). We couldn't find the verification meta tag." Below the error message, there are instructions to verify ownership and a note about Google Account recording. There are three tabs: "Recommended method", "Alternate methods", and "History". Under "Alternate methods", the "HTML tag" option is selected and circled in red. It includes instructions to copy a meta tag and paste it into the site's home page. The meta tag code is: `<meta name="google-site-verification" content="Xrz-HLQVNwIFJtoDWrB7Rqfa3ViBF-DUnu4_aLxC7A0" />`. Below the code is a "Copy" button and a "Show me an example" link. The second step is to click "Verify". At the bottom, there are three radio button options: "HTML file upload", "Google Analytics", and "Google Tag Manager". The "VERIFY" button is circled in red, and a red arrow points to it from the "Google Tag Manager" option.

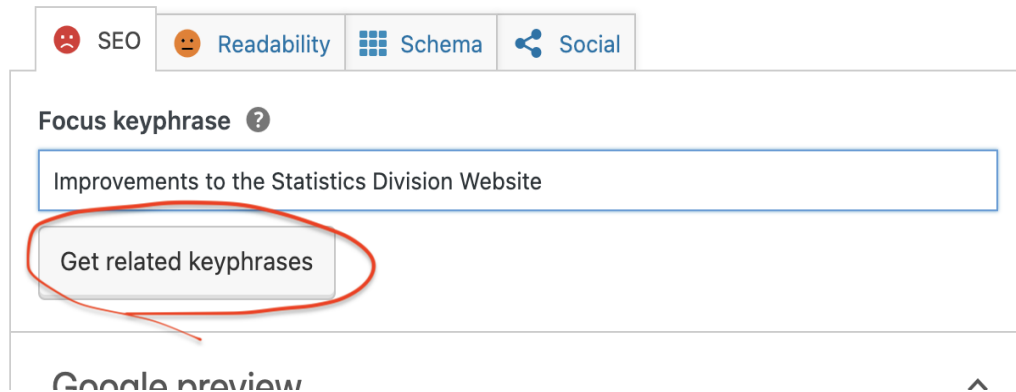
How to use Yoast SEO Plugin

This [video](#) explains how to use **Key Phrase**, **Google Preview** and **Readability** tools, the main aspects of the plugin.

Make keyword research easier (Focus Keyphrase)

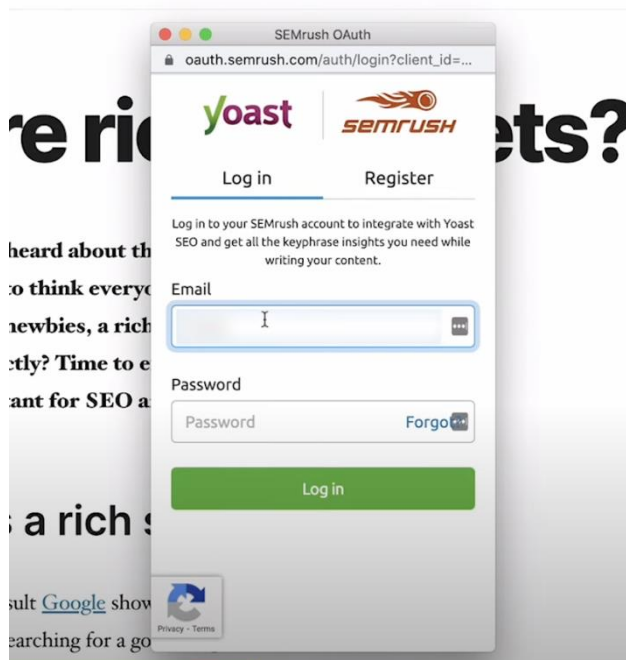
1. From the **Left Sidebar** of your WordPress dashboard, click on **Posts** or **Pages** and select an already existing post or page.
2. Scroll down to **Yoast SEO Premium**. In the **Focus keyphrase**, enter the keywords that you are actually targeting for that specific post/page. You could put the title of the post or page in the text area.

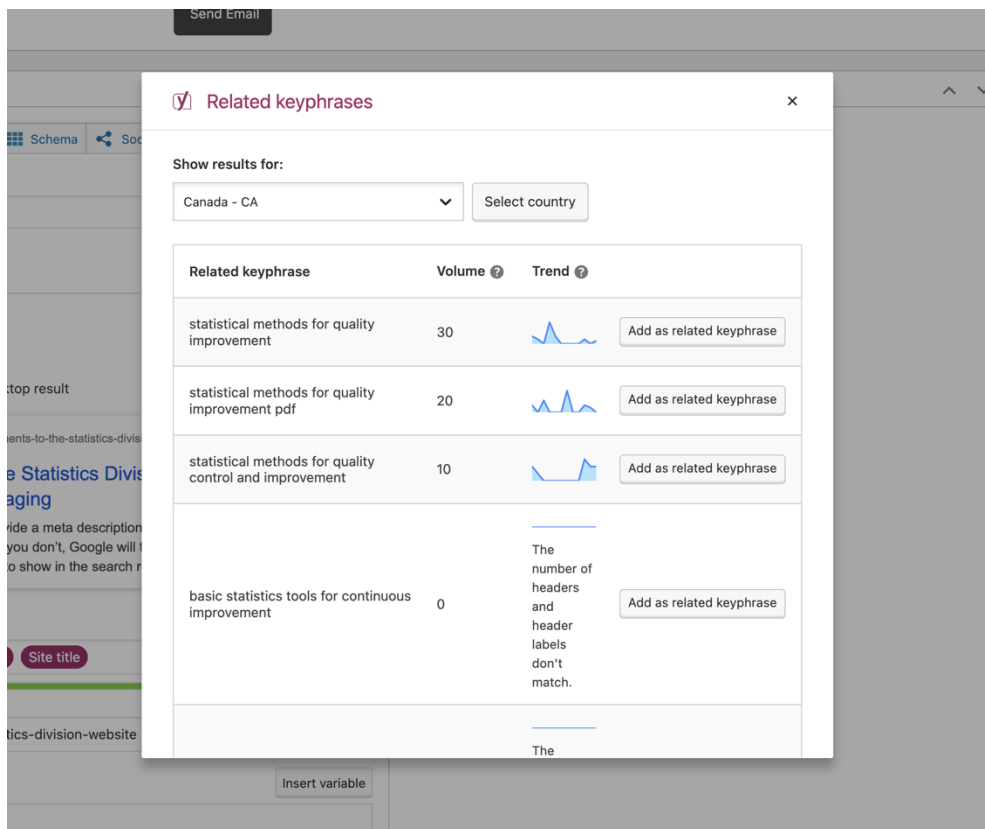
Yoast SEO Premium



The screenshot shows the Yoast SEO Premium interface. At the top, there are four tabs: 'SEO' (with a sad face icon), 'Readability' (with a neutral face icon), 'Schema' (with a grid icon), and 'Social' (with a share icon). Below the tabs, the 'Focus keyphrase' section is visible. The keyphrase field contains the text 'Improvements to the Statistics Division Website'. Below the field, the button 'Get related keyphrases' is circled in red. Below the keyphrase field, the text 'Google preview' is partially visible.

3. Click on the 'Get related keyphrases' button. A login window for SEMrush will appear as shown below. SEMrush is a leading visibility management and content marketing SaaS platform; it is an all-in-one tool suite for improving online visibility and discovering marketing insights. Register if you do not have an account and a verification code will be sent to the registered email. Once you log in, you will immediately see the SEMrush keyphrase tool. First you will see an option to select a country. Select the country that you would like to rank in. Look for it, select it, and then click on the **Select Country** button.





- Look through the related keyphrases and select the 'Add as related keyphrase' button to the related key phrases you would like to your sidebar in your Yoast Premium general page.
- You can now do your keyword research IN Yoast SEO, how cool is that!?! To help you find and use the most relevant keywords, we integrated the amazing Semrush keyword overview tool into Yoast SEO. In a few steps, you can get valuable keyphrase insights within the post editor.
- All these steps are found in the linked Youtube tutorial below. [How to use the Semrush keyphrase tool in Yoast SEO](#)

Customize meta data for Google Preview

1. On the Yoast SEO metabox, click on Google preview and the section shown below will appear. It displays what your post/page.

Google preview

Preview as:

Mobile result Desktop result

statcanbox.com › improvements-to-the-statistics-divisi...

Improvements to the Statistics Division Website > Prasc Staging

Oct 14, 2021 – Please provide a meta description by editing the snippet below. If you don't, Google will try to find a relevant part of your post to show in the search results.

SEO title Insert variable

Title Page Separator Site title

Slug

improvements-to-the-statistics-division-website

Meta description Insert variable

The SEO title displays the site title, the name of the page, a separator, and a tagline. You can change the appearance of the separator by clicking on Yoast SEO on a sidebar and then clicking on **Search Appearance**. In the general page, select the separator you would like to use. In this example, the separator chosen was '>'.

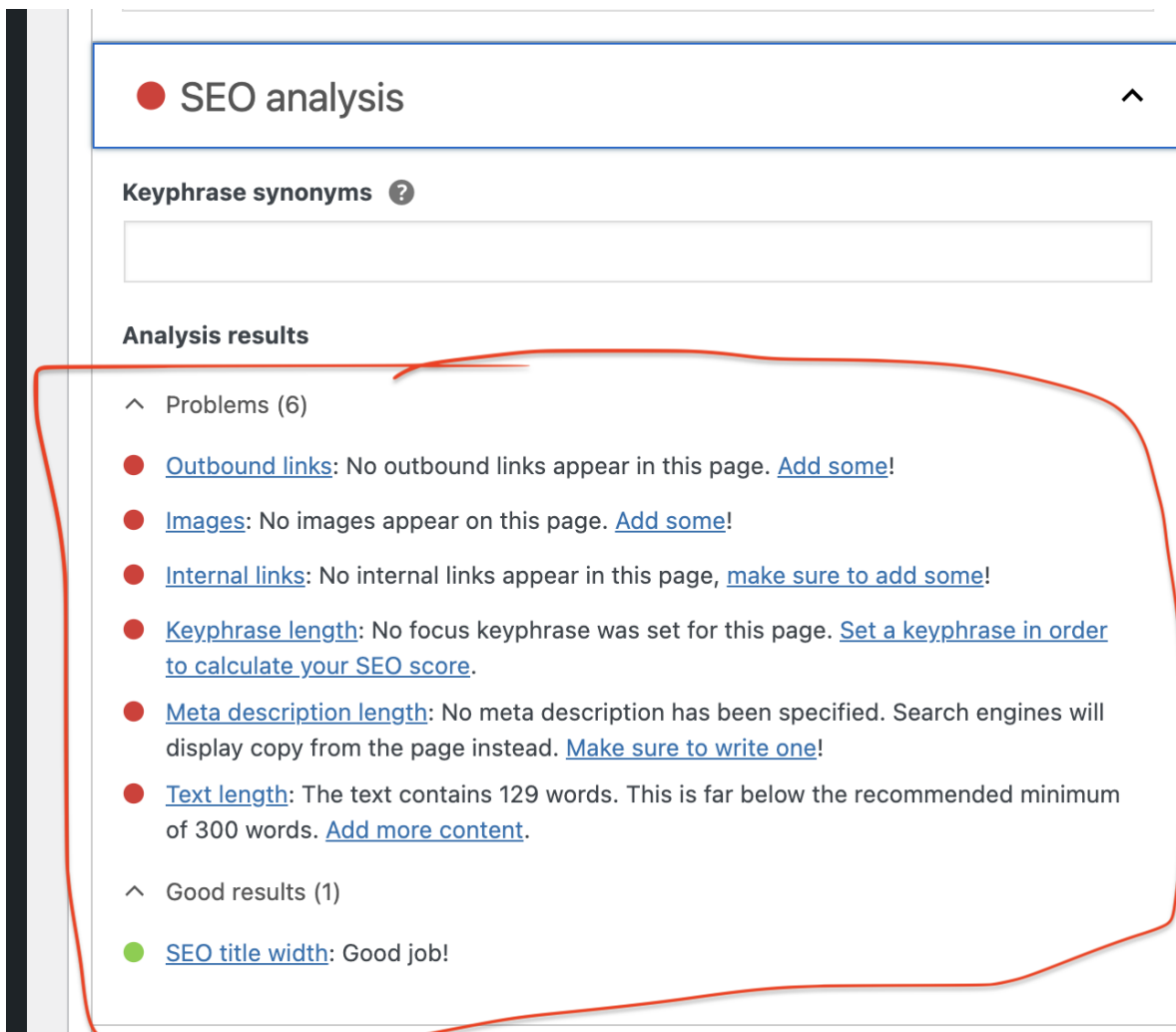
The screenshot shows the WordPress dashboard with the Yoast SEO plugin settings. The left sidebar contains various menu items, with 'Yoast SEO' highlighted in blue and 'Search Appearance' circled in red. The main content area is divided into three sections: 'Title Separator', 'Homepage & Posts page', and 'Knowledge Graph & Schema.org'. The 'Title Separator' section allows selecting a symbol for the title separator, with the right-pointing chevron (>) selected. The 'Knowledge Graph & Schema.org' section is set to 'Organization' and has 'Statcan Box' entered as the organization name. A 'Save changes' button is visible at the bottom.

Make posts of pages more readable using SEO Analysis

Just below the metadata text area, click on **SEO Analysis**. From the list, you can rectify the issues analyzed and optimize your post or page.

SEO analysis gives you feedback on how you can optimize your text. It gives you an SEO score and readability score. SEO score consists of individual assessment and each assessment will give you a feedback bullet which is either red, green, or orange which forms the SEO score. These bullets will point you to the areas that need improvement.

- This YouTube video [SEO analysis: what does Yoast SEO check? | Yoast SEO for WordPress](#) explains in detail how to use it. It does a text length check, checks related to your keyphrase, checks about links, feedback regarding your snippet and the overall SEO score.



The screenshot displays the Yoast SEO analysis interface. At the top, there is a header with a red circle icon and the text "SEO analysis". Below this is a section for "Keyphrase synonyms" with a question mark icon and an empty input field. The main section is titled "Analysis results" and is divided into two parts: "Problems (6)" and "Good results (1)". The "Problems" section lists six items, each with a red circle icon and a link to a specific issue: "Outbound links", "Images", "Internal links", "Keyphrase length", "Meta description length", and "Text length". The "Good results" section lists one item with a green circle icon: "SEO title width". A red hand-drawn line highlights the "Problems" section.

SEO analysis

Keyphrase synonyms ?

Analysis results

^ Problems (6)

- [Outbound links](#): No outbound links appear in this page. [Add some!](#)
- [Images](#): No images appear on this page. [Add some!](#)
- [Internal links](#): No internal links appear in this page, [make sure to add some!](#)
- [Keyphrase length](#): No focus keyphrase was set for this page. [Set a keyphrase in order to calculate your SEO score.](#)
- [Meta description length](#): No meta description has been specified. Search engines will display copy from the page instead. [Make sure to write one!](#)
- [Text length](#): The text contains 129 words. This is far below the recommended minimum of 300 words. [Add more content.](#)



^ Good results (1)

- [SEO title width](#): Good job!


The picture below showcases what the SEO score analysis looks like.

Analysis results

^ Problems (8)

- [Outbound links](#): No outbound links appear in this page. [Add some!](#)
- [Images](#): No images appear on this page. [Add some!](#)
- [Internal links](#): No internal links appear in this page, [make sure to add some!](#)
- [Keyphrase in introduction](#): Your keyphrase or its synonyms do not appear in the first paragraph. [Make sure the topic is clear immediately.](#)
- [Keyphrase in SEO title](#): Not all the words from your keyphrase " tables" appear in the SEO title. [For the best SEO results write the exact match of your keyphrase in the SEO title, and put the keyphrase at the beginning of the title.](#) 
- [Meta description length](#): No meta description has been specified. Search engines will display copy from the page instead. [Make sure to write one!](#) 
- [Keyphrase in subheading](#): [Use more keyphrases or synonyms in your H2 and H3 subheadings!](#)
- [Text length](#): The text contains 2 words. This is far below the recommended minimum of 300 words. [Add more content.](#)

^ Improvements (1)

- [Keyphrase in slug](#): (Part of) your keyphrase does not appear in the slug. [Change that!](#) 

^ Considerations (1)

- [Keyphrase distribution](#): [Include your keyphrase or its synonyms in the text so that we can check keyphrase distribution.](#)

^ Good results (3)

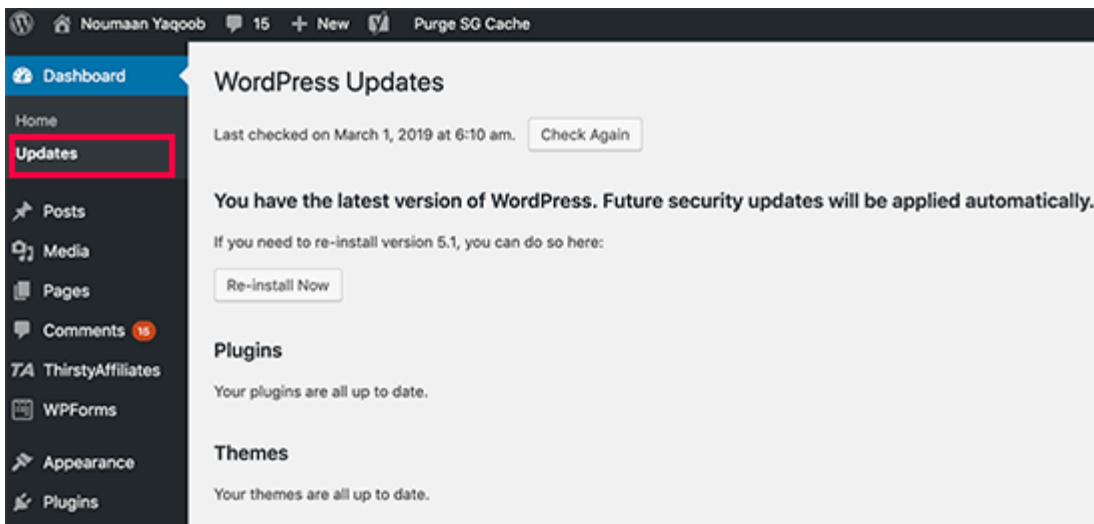
- [Keyphrase length](#): Good job!
 - [Previously used keyphrase](#): You've not used this keyphrase before, very good.
 - [SEO title width](#): Good job!
-

Security

Maintaining a secure site is extremely important; it protects it against hackers and malware. Nothing is 100% secure, so take the time to follow our recommended precautions. For a more detailed explanation, click [here](#).

WordPress Updates

While WordPress automatically installs minor updates, major updates must be manually updated by you. The same goes for all your installed plugins.



Passwords and User Permissions

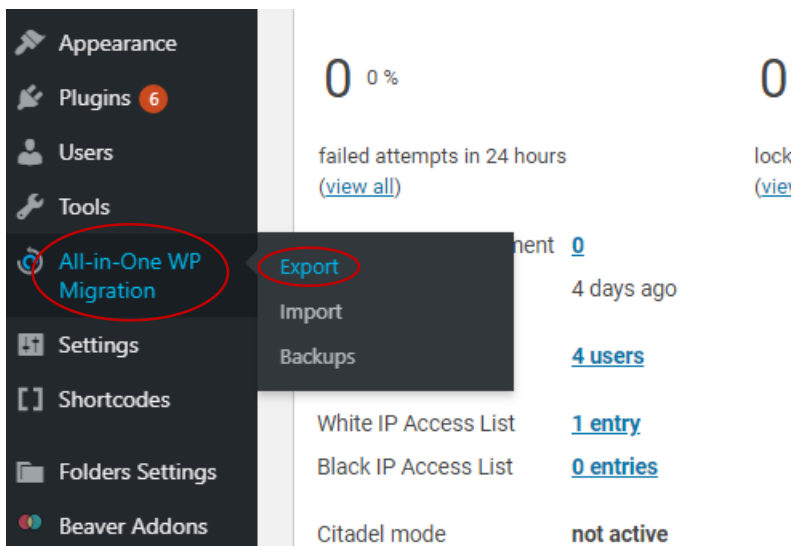
The most common form of hacking is through stolen passwords. Make sure you set strong and unique passwords for your website, your hosting site, and your associated email. If you, like most of us, are worried about forgetting your passwords, we highly recommend using a password manager. Password managers securely store all your passwords which you can access using one master password. A solid and free option is “Last Pass” which you can check out [here](#).

Limit the number of people who have admin accounts with your site as this creates greater risk of hacking. Learn the different user [Roles and Capabilities](#) in WordPress and assign them to your staff accordingly.

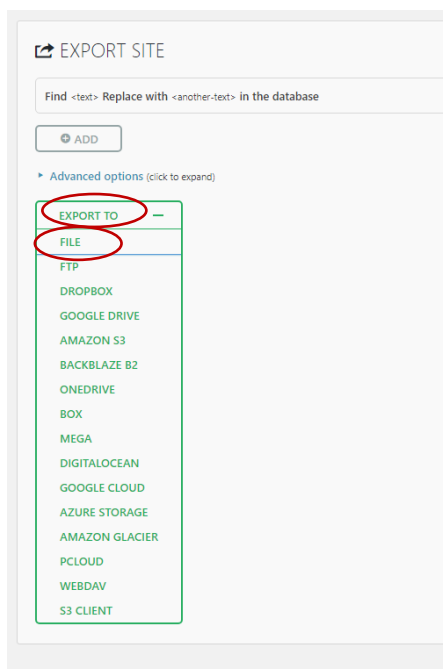
Backups

Backups are a strong line of defence against hackers, they allow you to quickly restore your site if needed. You must **regularly** save full-site backups to a **remote location**, i.e., not your hosting account. Save a copy to your WordPress account, as well as cloud. At a minimum, we recommend backing up your site every **Friday** before finishing your workday.

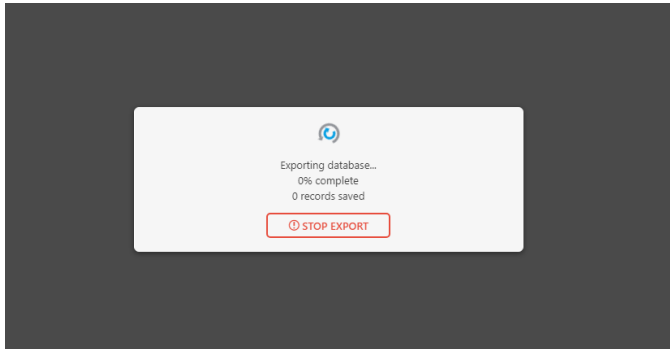
1. To back-up your site, you must have the **All-in-One WP Migration** plugin installed and activated. Mouse over the plugin on the Left Sidebar and select **Export**.



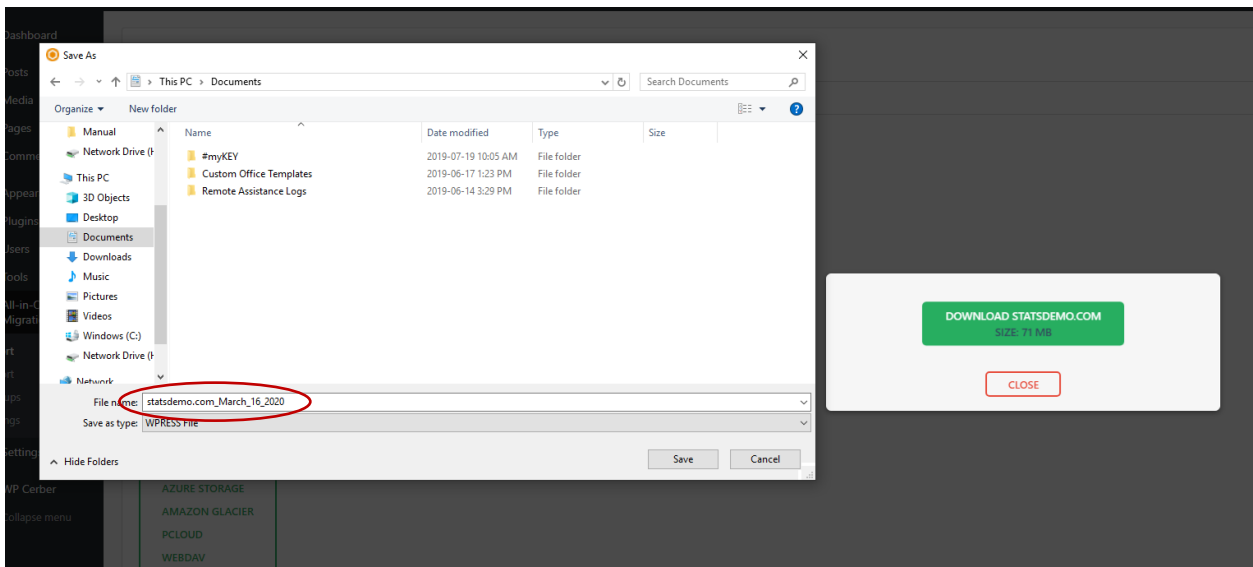
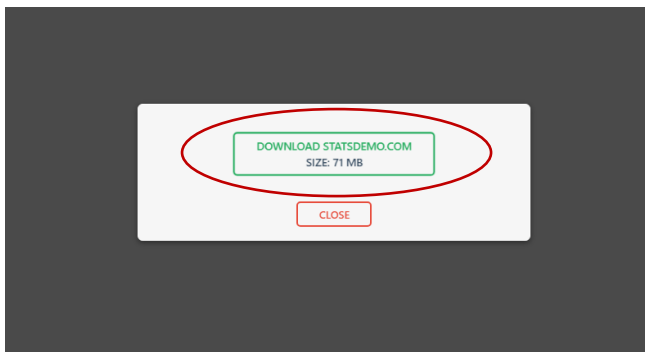
2. Click **Export To** and select **File**.



3. Your site will take some time to export.



4. Once it's complete, click the **“Download [title of site]”** button and select the location on your computer for download. We recommend renaming the file to include the date of download.



SSL/HTTPS

Security Sockets Layer (or SSL) encrypts data transfer between your site and the user's browser. Make sure to purchase an SSL certificate for your site.

References

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2. <https://en.support.wordpress.com/dashboard/>.
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5. <http://www.dummies.com/web-design-development/wordpress/wordpress-for-dummies-cheat-sheet/>.
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