Phew!
WEBSITES

Websites

Delegate User Manual

Phew!
WEBSITES

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Introduction

This manual has been developed to support users in their use of WordPress. WordPress is the content management system (CMS) that enables you to make content changes to the front-end of your website.

⚠ On occasion there might be some extra information that we do not cover in training but is available on your site.

Conventions used in this document

This manual uses icons to illustrate comments with the following purposes.

⚠ Warning

✓ Best Practice

👍 Useful tips

➔ Navigate to

Objectives

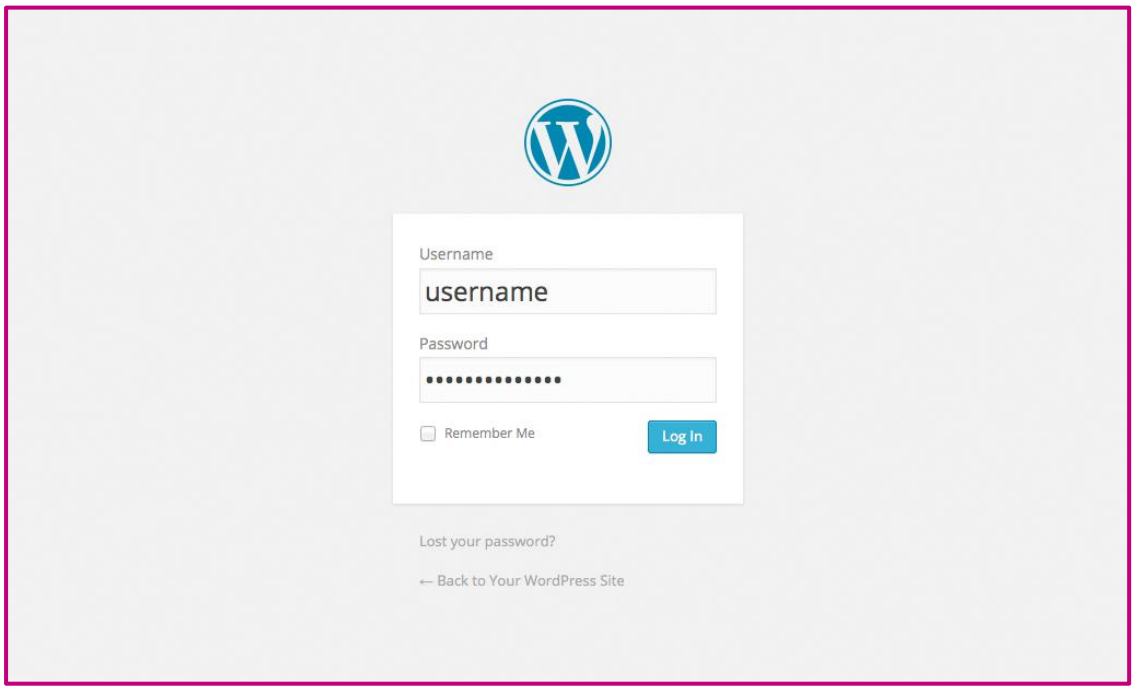
This manual will take you through:

- How to log on.
- How to navigate around the site.
- How to add, update and delete pages, blog, news posts and images.
- How to add, update and delete news posts.
- How to add, update and delete pages images.
- How to manage users.
- How to amend broken links.

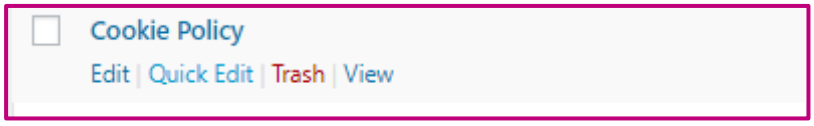
Logging In

You should have received an email informing you that a WordPress account has been set up for you. In this email will be a link to follow where you can set your password.

If you have not received this e-mail, please contact support@phew.org.uk



Common features



The following are common on Posts/news, Pages, Partners, Documents, Resources, Testimonials, and comments.

- Edit: will allow you to edit your X.
- Quick Edit: allows you to edit basic X information.

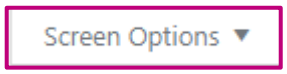
  ✓ Do not use this feature as it can distort what you can see.
- Trash: will send the X to the Trash.
- View: displays the Page as it appears live to your website viewers. If the Page hasn't been published yet, this will say Preview.
- Clicking the ▼▲ will expand each section.

Top Menu icons

	This is all about WordPress.
	This is your home button and will take you to visit your site i.e. your web page.
	Update Theme this is the theme of your site, if you see a number against it this is about updates.
	These will show number of comments and will take you to the comments.
	This is your new button you can create a new element when selecting any of the options from the "fly-by" menu

Notifications

The tool bar will show on the left-hand side the name of the current user.

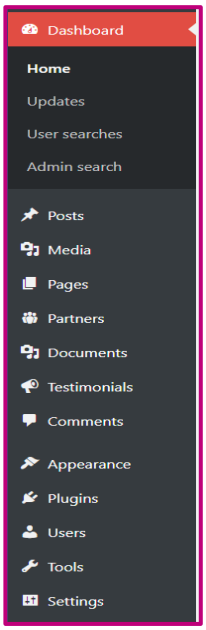


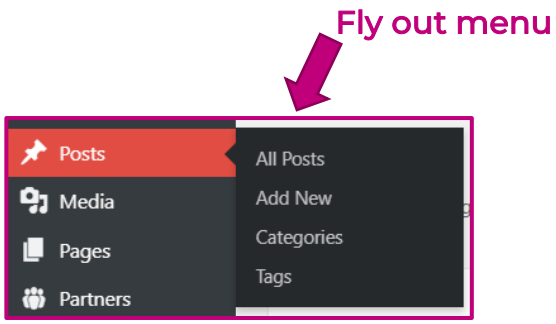
Select this link and the panel will slide down the page and offer you options to set which panels you would like to be displayed on the page.

Select this link for an overview of the page you are working on and available actions. You will be also offered Docs, FAQ and Support.

When you hover over each of the icons on the tool bar the system will tell you what they all do.

Side Menu icons





Down the left-hand side of the Dashboard and on every page, you will see your main navigation menu. This is where you'll find all the options to update and configure your site. Hovering your cursor over each of the main menu options will display a fly-out menu with the various choices for that menu option.

Once you click each of the main menu options, that menu will expand to show all the available options within that section.

These can differ site to site.

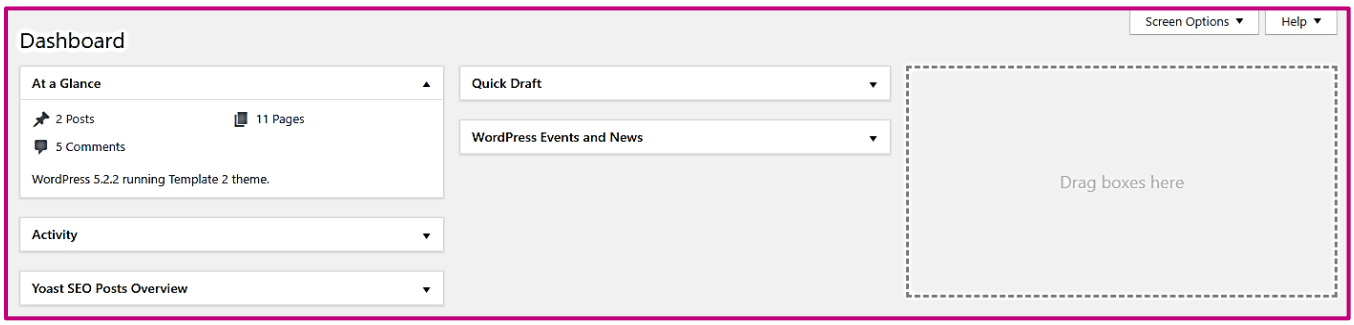
As you hover over each heading it will be highlighted in red.

Updates

Should a new version of WordPress become available, the system will give you the option to update it. Please do NOT do updates yourself - instead contact support@phew.org.uk and we will take care of It.

Phew updates WordPress for you as we go through a specific process to ensure the site is compatible with the new version and no functionality is compromised.

Dashboard



Once you've logged in, the WordPress Dashboard appears. This is your main administration homepage.

At the very top of your Dashboard next to the home button and across every page you will see the header menu with the name of your website in the header area.

Dashboard Navigation

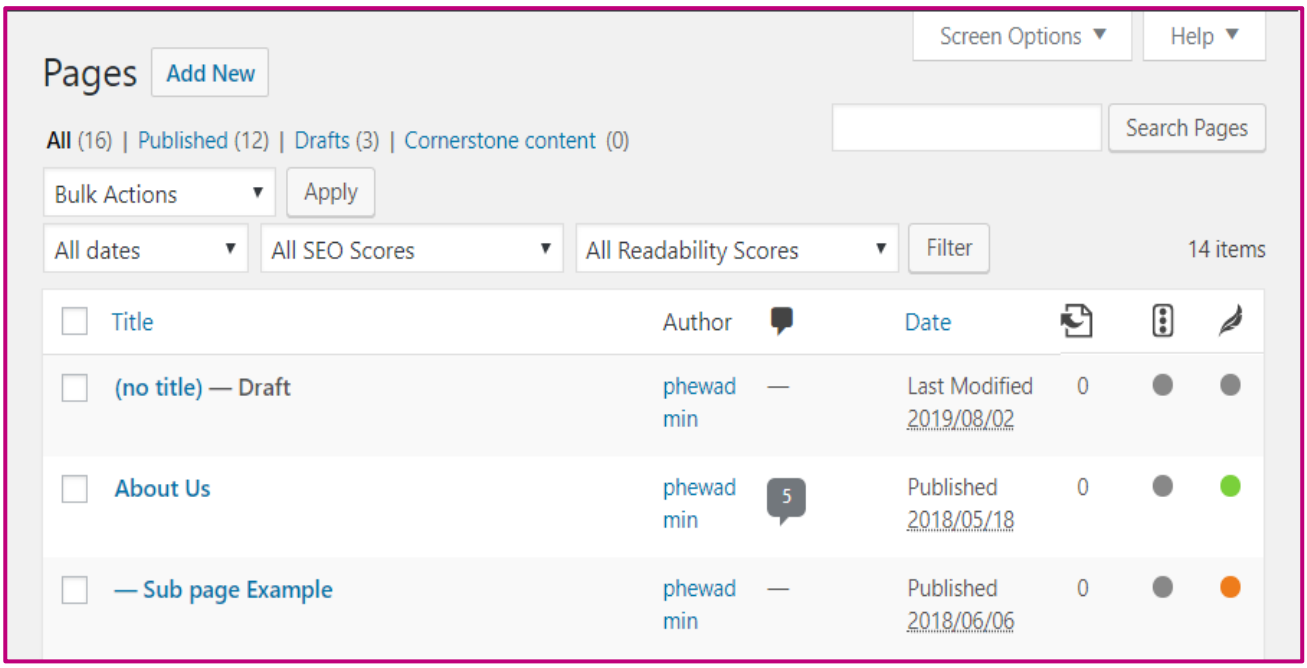
- Posts: this is where you can create a new blog or news post. You can also update your Categories and Post Tags.
- Media: this is where all your uploaded images, documents or files are stored. You can browse through your media library, as well as edit and update the files.
- Pages: this is where you create and maintain all your website's pages.
  Partners: this is where you create and maintain all the organisations that you are closely involved with. This is optional and might not be set up on your site.
- Documents: presents your documents in an easy to find format and keep your document library organised this feature and you are not required to login to access the documents. This is optional and might not be set up on your site.
- Resources: this feature works in the same way as documents the difference is that you are required to login to access the documents. This is optional and might not be set up on your site.
- Testimonials: this feature lets you collect kudos from customers and clients and display them on your site to add credibility and a professional feel.
  This is optional and might not be set up on your site.
- Comments: you can manage all your comments within this section, including replying to comments or marking them as spam.
- Phew forms: this is a contact form.
- Appearance: this menu is where you control how your site looks. You can choose a new theme, manage your site widgets or menus and even edit your site theme files.
- Plugins: Plugins extend and expand the functionality of WordPress. You can add or delete plugins within here as well as activate or deactivate them.

Phew will manage this section.

- Users: this screen lists all the existing users for your site. Depending on your role, you can also add new users as well as manage their roles.

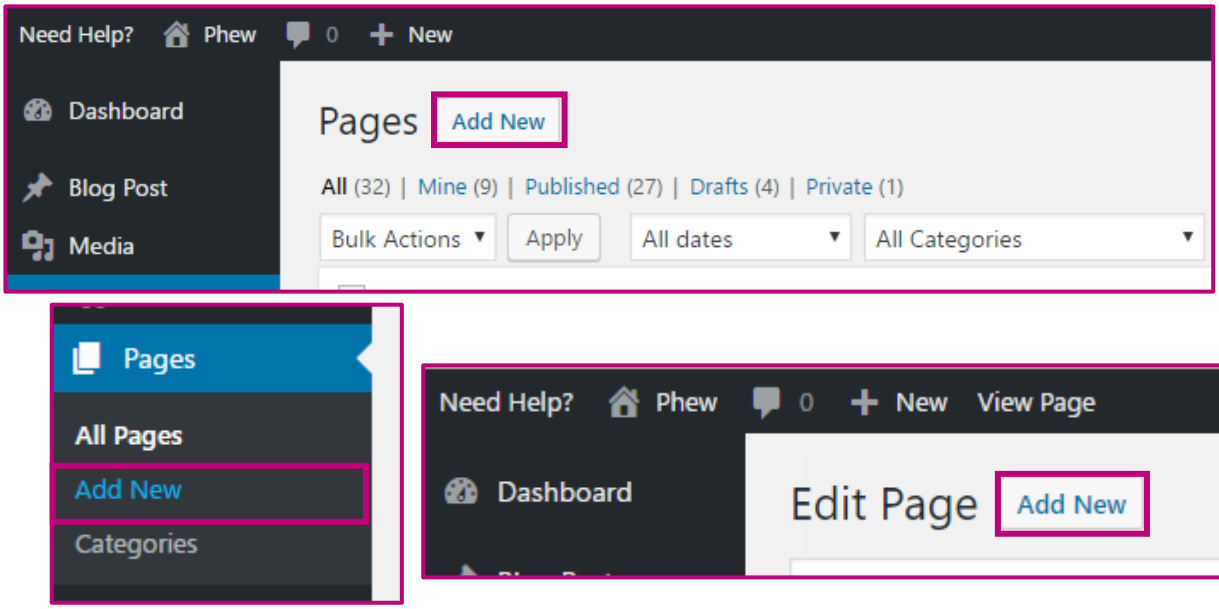
- Tools: this section gives you access to various convenient tools. You can also import data to your WordPress site or export all your WordPress data to a file.
- Settings: this is where most of your site is configured. It allows you to configure your site name and URL, where your posts appear, whether people can leave post comments or not and numerous other settings. Most times, once your site is setup, there's no need to change any of the settings within this section.
- Collapse menu: this feature allows you to reduce your menu to icons only sizes to give you more room on your screen and work area.

Pages



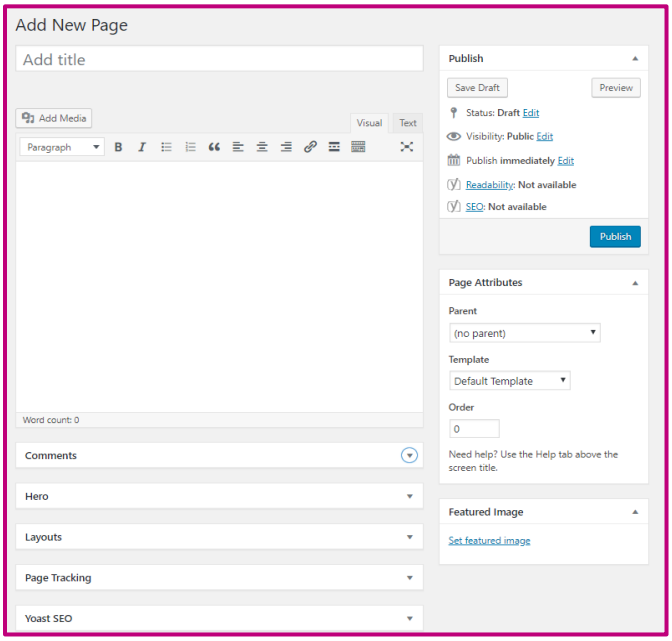
Pages are what make up the bulk of your website. They are easy to add, edit as well as remove if you need to. When you click on All Pages from the menu, you will collectively see a list of all the pages that have been created;
At the top of the page you can view how many Pages in total you have in your site and how many are published or in draft.

How to add a Page



Adding content to your site is an easy process no matter whether you're creating a Post or a Page. The procedure for both is almost identical. Apart from how they display on your site.

The main difference is that Posts allow you to associate Categories and Tags whereas Pages don't.



There are three ways you can add a new Page:

- Select Add New on the dashboard.
- Select Add New when looking at the pages overview.
- Select Add New when you're viewing an existing page.

Once you have clicked on one of these you will be taken to the new blank page where you can enter the new page information.

Here you will be prompted to add a Page title, the main content, images, categories and page attributes.

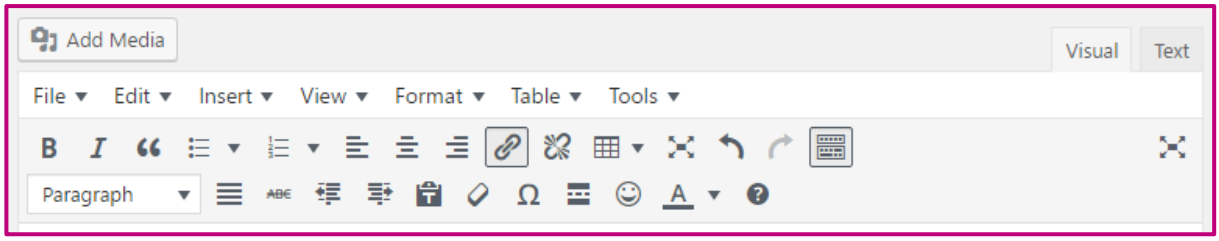
To add a page to your site:

- Got to Pages and select the click the Add New button at the top of the pages screen.
- This will take you to the Add New Page.
- Which has the WordPress editor and all the settings for your new page.

Note that depending on your website design the layout may differ.

- In the top box, you'll enter the Title of your new page.
- The Editor area is where you'll enter the content of your page and insert images.
- The page attributes section applies a parent page and template to your new page.
- The publish section is when you're are ready to publish your page. You have several options that you can choose:
    - You can preview the page.
    - You can publish the page immediately.
    - Save the page as a draft.
    - You can schedule when the page can be published.

Text Editor



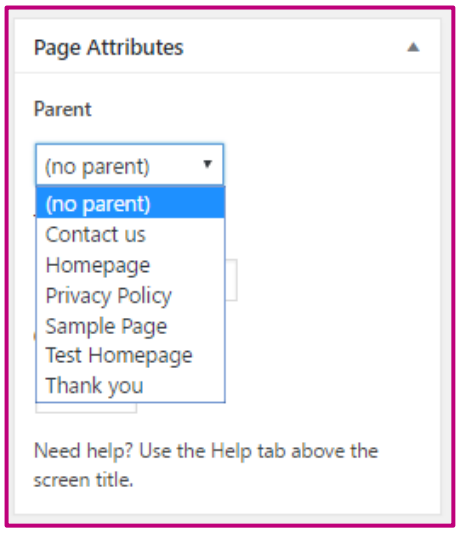
Once you have entered your Page title you can use the Text Editor to insert the main bulk of copy, images and links. Many of the features on this box are like Microsoft Word or other word processors.

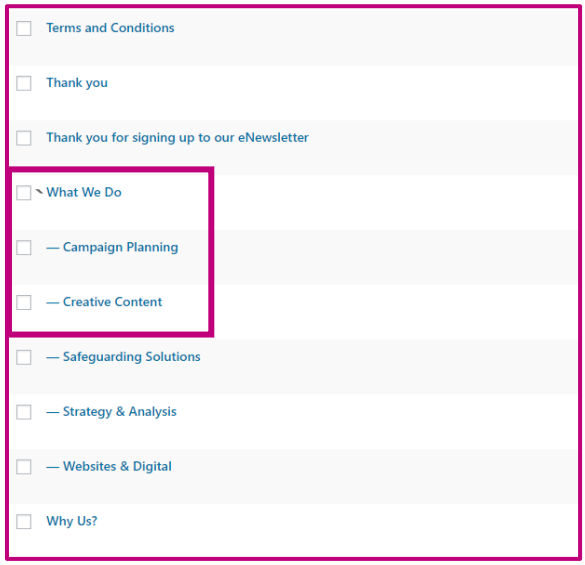
All the above symbols are explained individually in our References at the end of this manual.

If you already have your Page's content written and want to simply paste it in, this can be done by using the Paste button.

✓ Always paste as plain text.

Page Attributes





This is where you can assign the Page to a Parent. Where the page belongs or is connected to using the Parent drop-down menu.

The premise is that a page sits in a specific part of the site in a tree-like structure.

This relationship can be amended at any time by going back to the Page Attributes panel on the right-hand side. However, the page will still be an unseen page as you have not yet asked WordPress to display the page under any drop-down menus.

Each page that has a Parent page, will show up in the back end with a dash next to it so the administrator will see that page is connected to another. If a page has No Parent then that page is said to be a top-level page, e.g. Terms and Conditions.

How to edit a Page

To edit an existing page, simply click on the relevant Page title, when viewing your list of Pages. Alternatively, click on the Edit link that appears beneath the title when hovering your cursor over each row.

The screen that appears will be the same as the Add New Page screen, only with the existing content displayed. When you've finished editing your Page or Post, click the Update button on the right-hand side.

When hovering your cursor over each row, a few links will appear beneath the Page title.

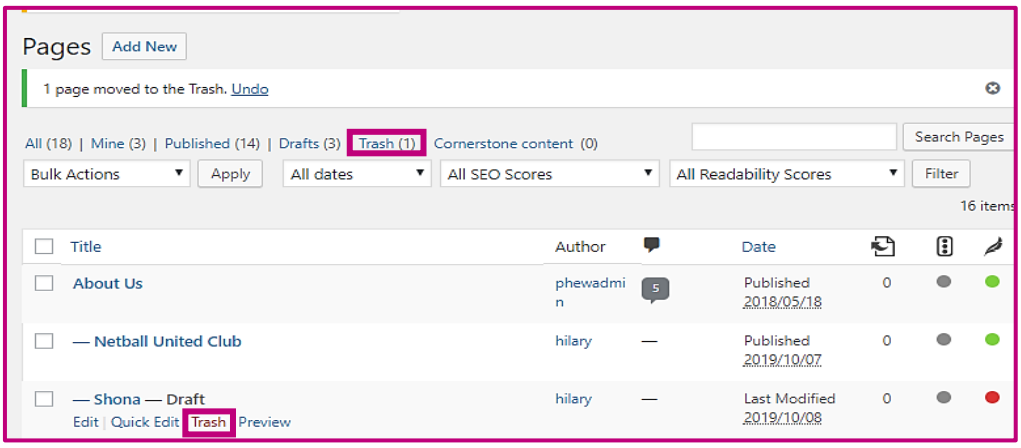
- Edit: will allow you to edit your Page. This will take you to the same destination as clicking on the Page title.
- Quick Edit: allows you to edit basic Page information such as Title, Slug, Date plus a few other options.
- Trash: will send the Page to the Trash.

⚠ Once the Trash is emptied, the page is deleted.

- View: displays the Page as it appears live to your website viewers. If the Page hasn't been published yet, this will say Preview.

To edit pages, we suggest always using the Edit button rather than the Quick Edit as it will display the full details of the page you are trying to edit. Whereas the Quick Edit only gives a brief overview of options that can be misleading.

How to delete a Page



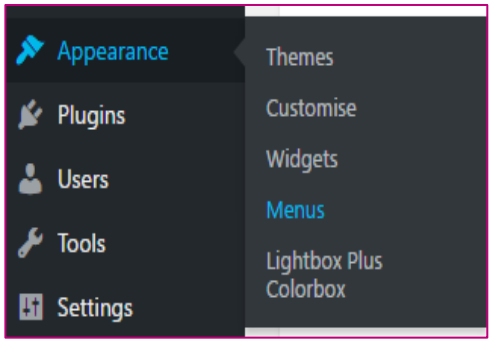
If you wish to delete one of your Pages or Posts.

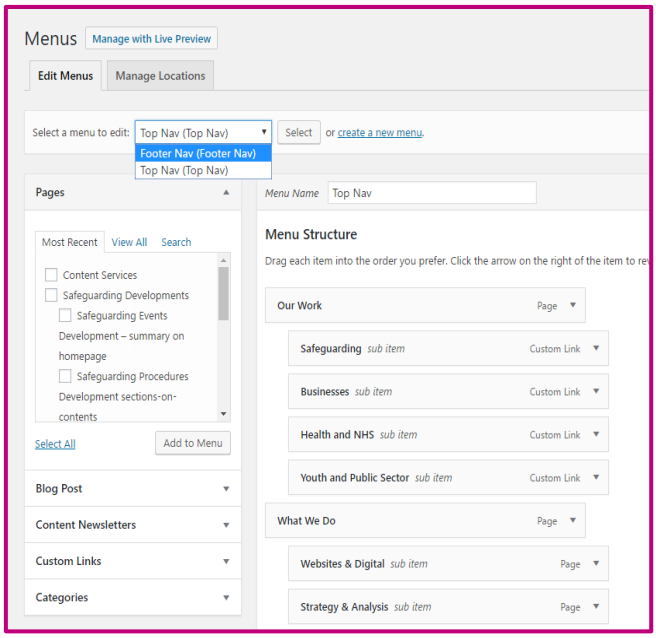
- Click on the Trash link that appears beneath the title of your page or post when hovering your cursor over each row.
- This will move the Page or Post to the Trash.

To delete the Page or Post permanently or to restore the Page or Post.

- Click the Trash link at the top of the screen.
- When the cursor is hovering over each item in the Trash, the Restore and Delete Permanently links appear.
- Click Delete Permanently to permanently remove a single Page or Post.
- Clicking Restore will restore the Page or Post.

How to add your page to the drop-down menu





Should you wish to add your newly created page to the drop-down menu, you can do so via the Appearance and Menus option.

- You must ensure you have selected the correct menu in the options as this is where you will be adding the new page.
- Use the left-hand side box to select your name page

  There will be the option to view the most recent Pages, all Pages or use the search functionality.
- Just click on the title of each to switch between the tabs.
- Once you have clicked on your page, press the Add to Menu button.

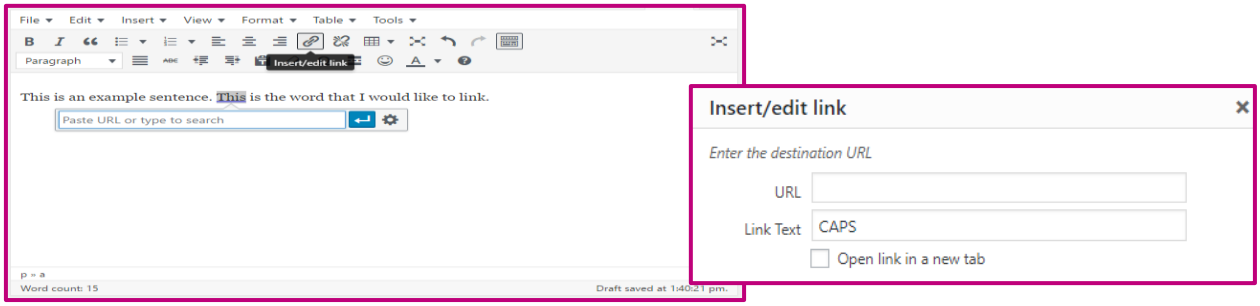
  WordPress will automatically add this to the bottom of the list.
- You will then need to click, drag and drop the Page to where you want it to sit.

- If it is a child Page, make sure it is sitting slightly indented so WordPress knows it is to appear under the Parent page you're linking it to.

- Don't forget to click on the Save Menu button which can be found at the top and bottom of the menu structure.

To see it live, go back to the front-end view of the website, press the control key and F5 at the same time to do a hard refresh and there you should see your new page sitting under the menu.

Adding links to a page



- If you wish to add an external link to your page, all you need to do is highlight the word you wish to link and then click on the link symbol:
- Enter the web address into the URL.
- Click on the cog and under link text tick the open link in a new tab.
- Click the update button.

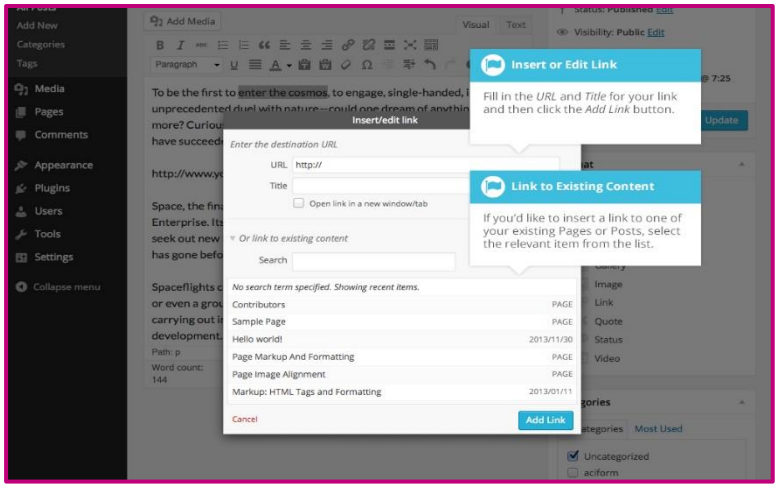
✓ And it's always best to check the Open link in a new window or tab.
This way, your webpage will still be open, and your users won't be completely navigated away from your website. Once they have finished looking at the external link and closed this down, your site will still be there for them to go back to.

- Click update to update the page.

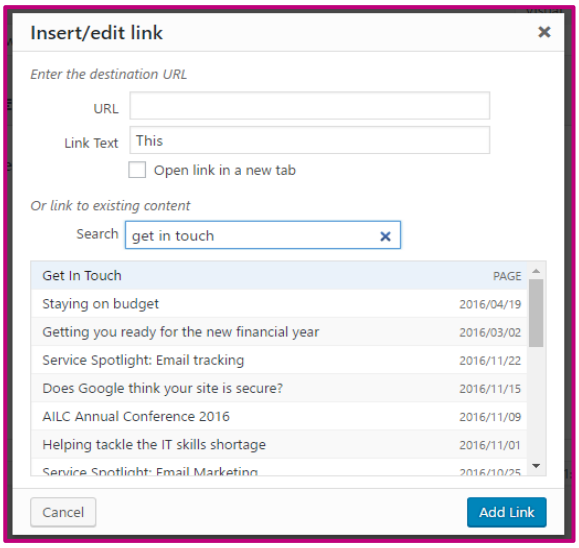
How to remove a link

- To remove the link, highlight the word that you connected the link to and simply click on the Remove link symbol and remember to update the page to save the change.

This is the screen you will be taken to once you click on the hyper link:

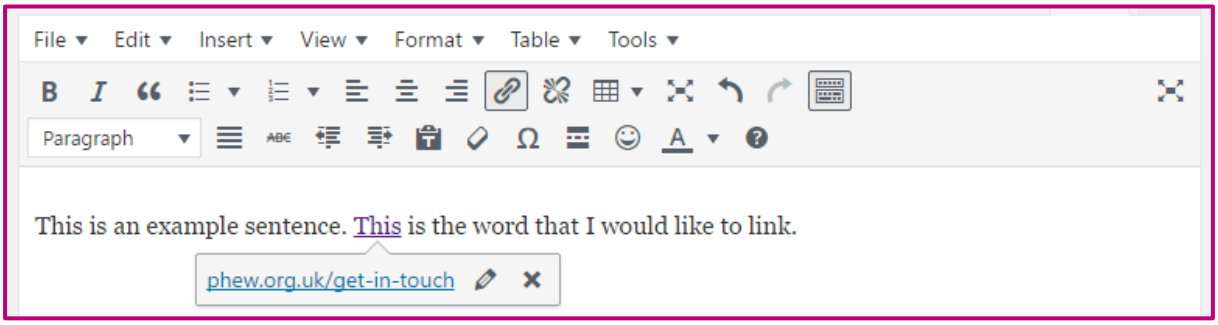


Linking internal pages

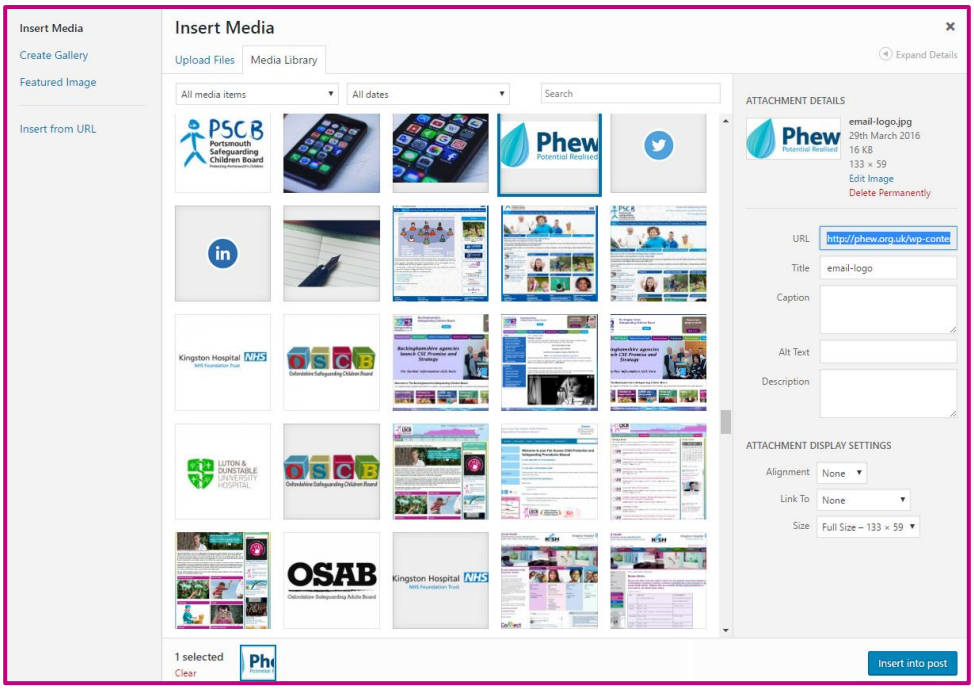


Occasionally you might want to refer a user to a different page within your website. This essentially is done in the same way however, this time we click on or link to existing content; you don't need to worry about opening a link in a new window here as users are already on your site.

You can use the search to quickly find the page, for example a common one is the Contact us page, once you have searched for and selected this page you press Add link.

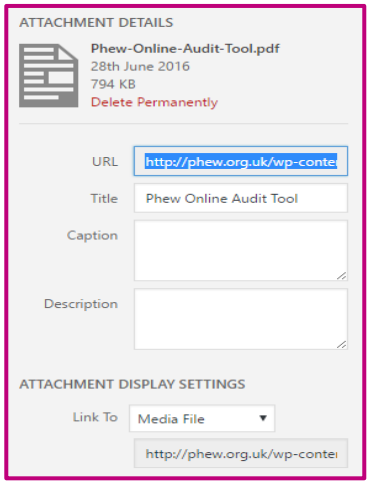


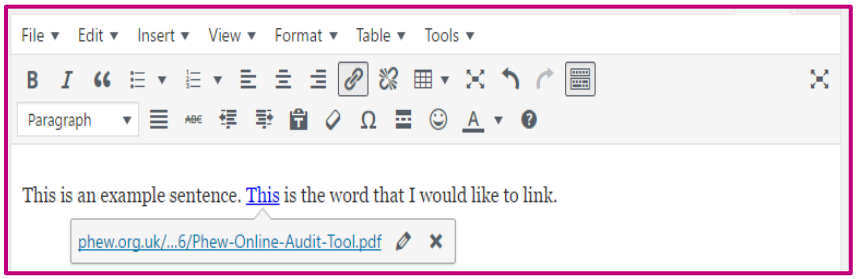
Linking files - PDF's and or Word documents



This works in a similar fashion to adding media, except you can add word documents and or PDFs. Just click on and select the document you'd like to insert into post.

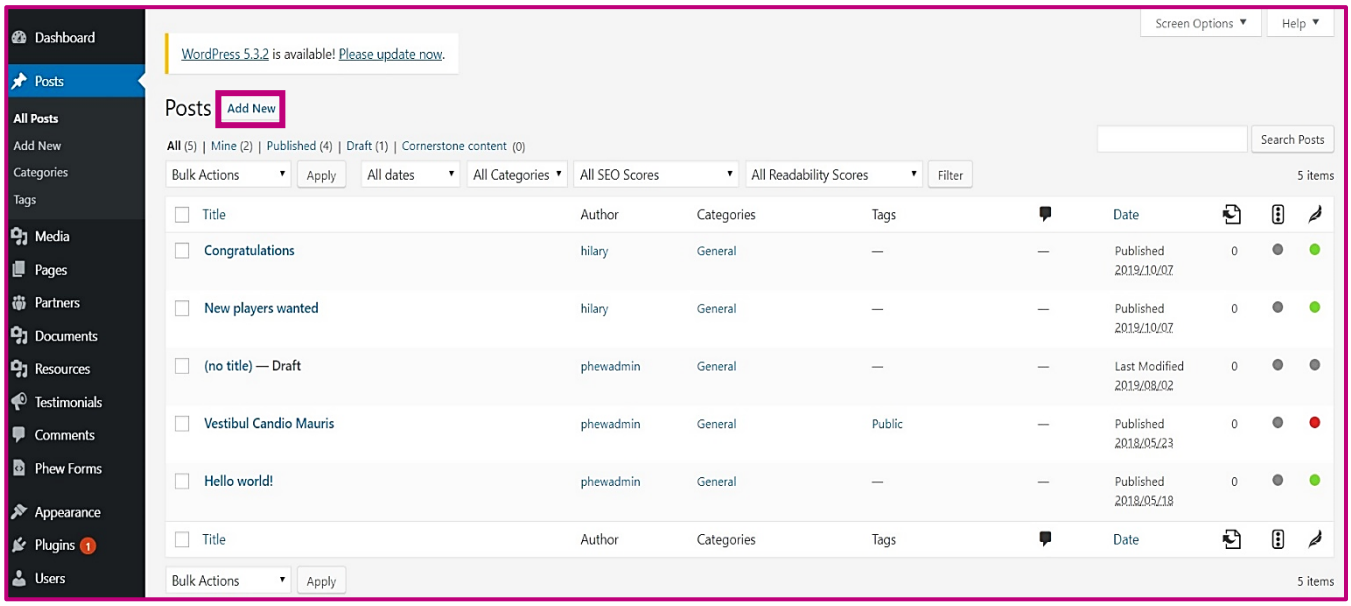
Triple click the URL name to highlight the whole URL – some will be hidden that you can't see.





Posts or News

How to add a post or news



News articles can also be called Blog Posts.

By clicking on Posts, you can go in here and edit exiting posts and add new ones just like we did with pages.

To add a Post:

- Got to Post and select the click the Add New button at the top of the post screen.
- This will take you to the Add New Post.

Note that depending on your website design the layout may differ.

- In the top box, you'll enter the Title of your new post.
- The Editor area is where you'll enter the content of your post and insert images.

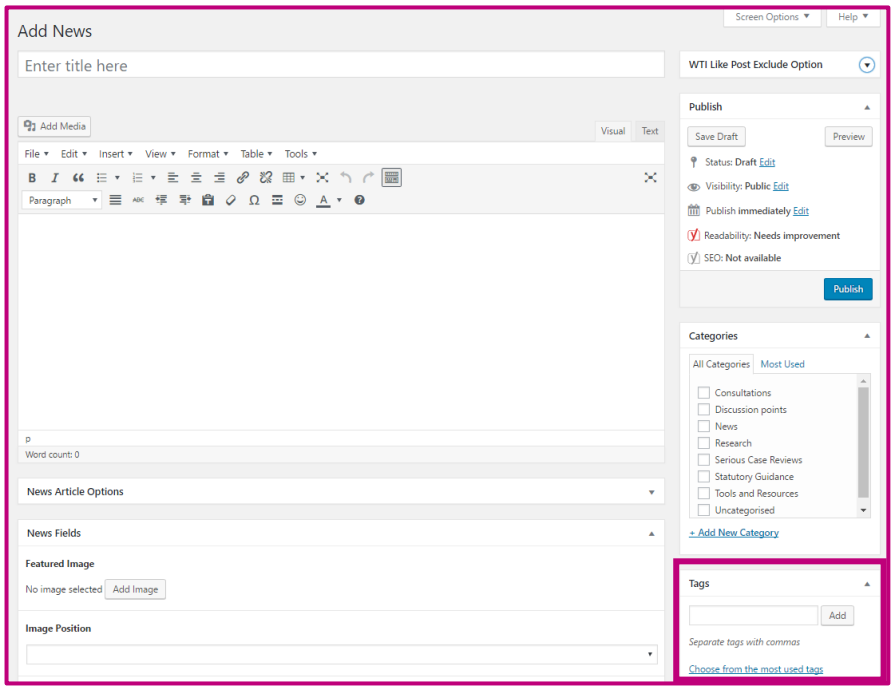
  You can also add images within the body of the text and then either left, centre or right align the photo using the tools in the Text Editor or click on the image.

- In Comments this feature Is usually switched off. Is where logged in users can comment and see other comments.
- The Page Tracking allows you to track the news add in the tag you wish to track
- The publish section is when you're are ready to publish your page. You have several options that you can choose:
    - You can preview the post.
    - You can publish the post immediately.
    - Save the post as a draft.
    - You can schedule when the post can be published.

  A useful feature when creating a news article is that you can either publish the article immediately or you can schedule a post. Simply click on Edit to select a publish date.
- The Categories section allows you to categorise your Posts/Articles.

Note that depending on your website design this may not be set up.

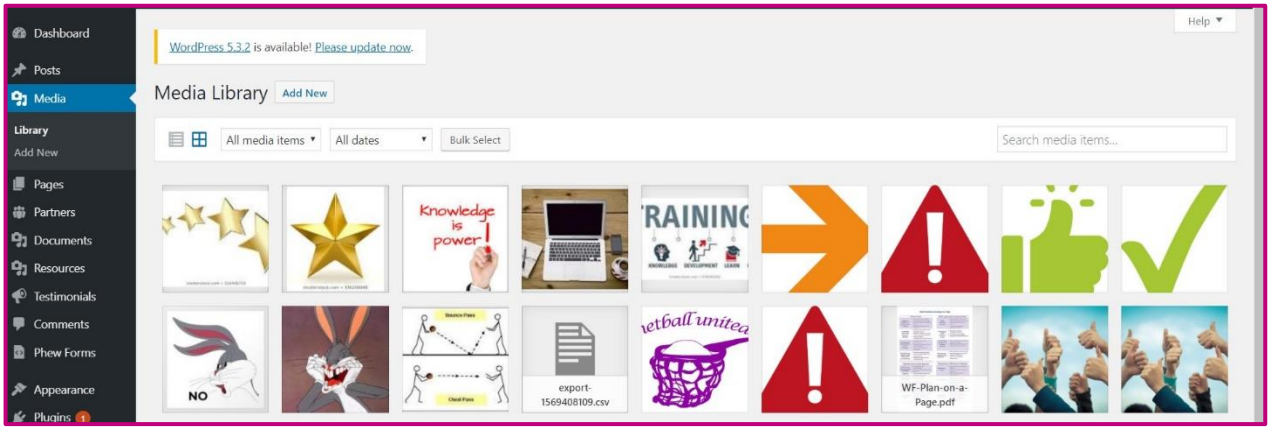
How to add Tags



We also recommend using Tags. In here, you add in words that highlight what the article is about, e.g. New website, anything that is relevant.

This is good for search engine optimisation (SEO) as sometimes these keywords can be picked out on Google.

Media



This is where all your images and files for your site are stored in the Media Library, e.g. this will be photos, Word documents and PDF files. You can add or delete files at any time.

Adding images and other media files such as videos, documents or PDFs is extremely easy within WordPress.

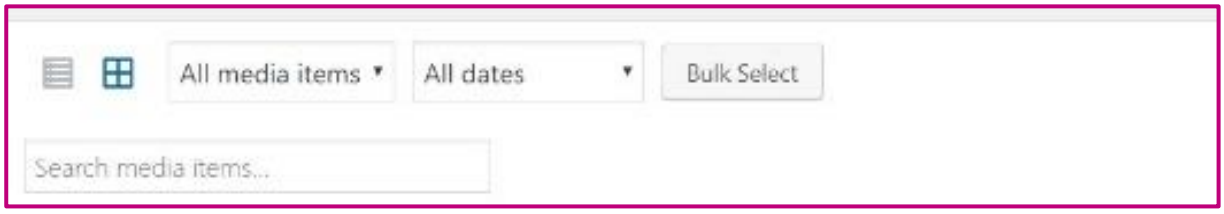
Once they're uploaded into the Media Library, it's a very simple matter to insert them into your Page or Post content.

In the case of files such as Word Documents or PDFs, it's a simple process to create links to those files so that people can then download them.

Using the WordPress media manager, it's extremely simple to insert, align and link your individual images and image galleries

- ✓ It is good practice to remove any documents and or images that you no longer use.
- Removing images: to remove an image hover your cursor over it and click the small X.
- Rearrange images: click and drag each image to reorder them.

How to search for existing media



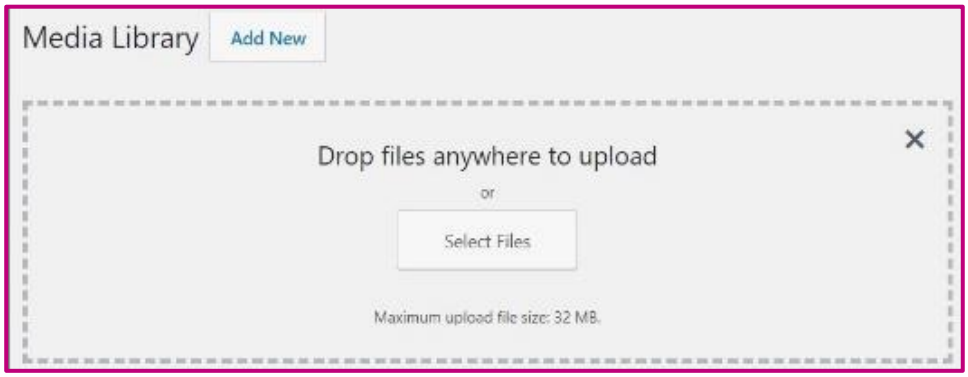
You can organise your media library either in a List or by Tiles.

The drop-down under All Media Items allows you to look at the media by Images Audio, video, unattached and mine.

The drop-down under All Dates will offer different months and years.

Alternatively, you can type fee text under Search Media Items.

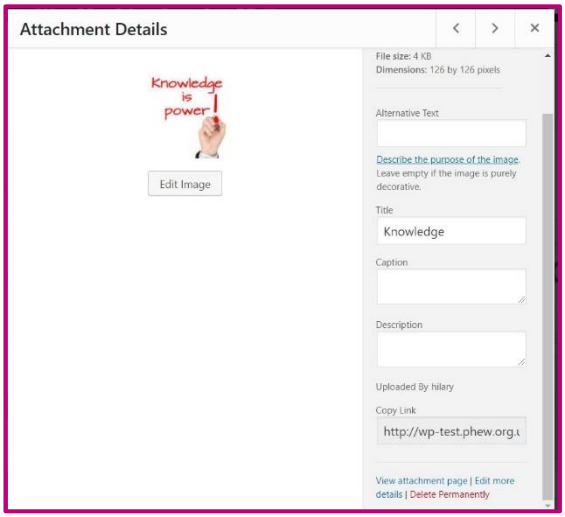
Adding an image or other files to your page



To insert an image into your Page or Post,

- Select the Add New button.
- Then choose from the following two options:
    - Then simply drag your image(s) from wherever they are on your computer, into the browser window. Your file(s) will be automatically uploaded.
    - Alternatively, click the Select Files button and then select the file(s) that you'd like to upload, using the dialog window that is displayed.

Image properties



Double click on the Image to add the image properties and or details.

- Alt Text: is displayed when the browser can't render the image.

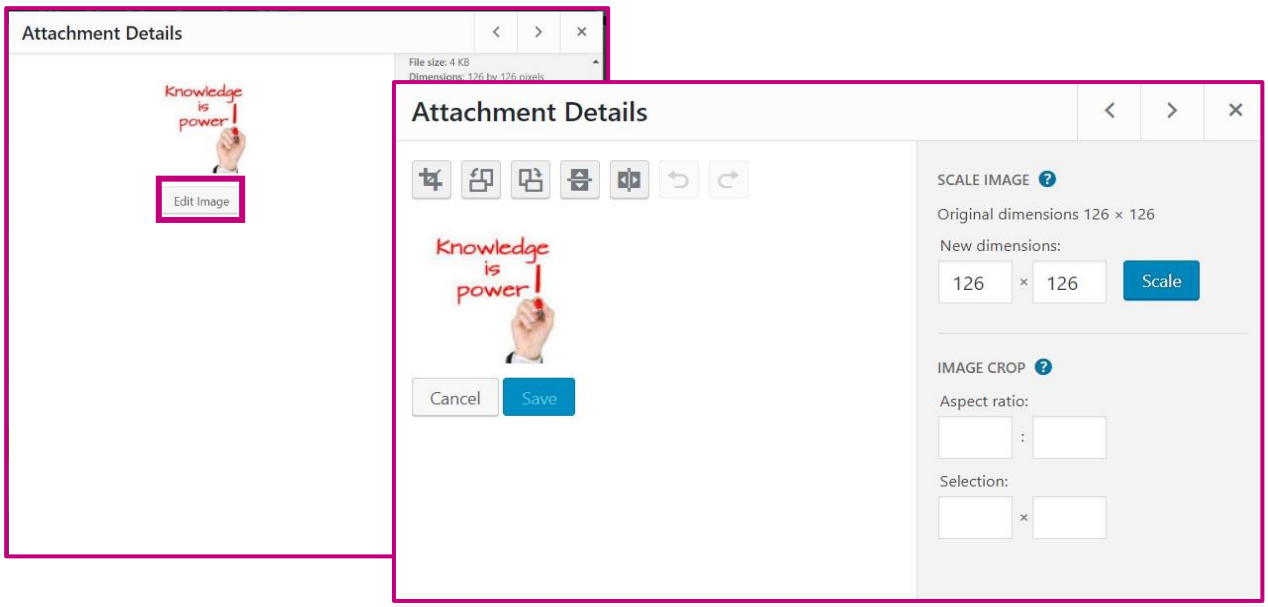
  It's also used by screen readers for visually impaired users so it's important to fill out this field with a description of the image.

  If you use images from other sources please ensure that the description is relevant to the pictures.

  To a small degree, it also plays a part in your website Search Engine Optimisation (SEO). Since search engines can't read images, they rely on the Alt Text.
- Title: is displayed as a tooltip when the mouse cursor hovers over the image in the browser.
- Caption: is displayed underneath the image as a short description.

  How the Images display will be dependent on the WordPress theme in use at the time. You can also include basic HTML in your captions.
- Description: is usually displayed on the attachment page for the media, however this is entirely up to the theme that is currently in use.

Image size



Be careful with image sizes. You will need a good quality image You don't want your image to be too large or else it can make load times very slow for website users.

the bigger the image, the longer the load time which can discourage the user from waiting on the page which of course, you want to avoid.

- The solution is to learn how to optimise i.e. trim images down to size before you upload them.
- Preparing images involves reducing the physical size and file size, while still leaving the images looking good.
- Images have both a file dimension pixel both in width and height and a file size e.g. KB or MB.
- When you do in-fact select an existing image within the media library to upload, you are also given the option to select a size.
- WordPress automatically creates 3 options for you to pick from:
    - Full size the size you originally uploaded the image in.
    - Medium size.
    - Thumbnail image.

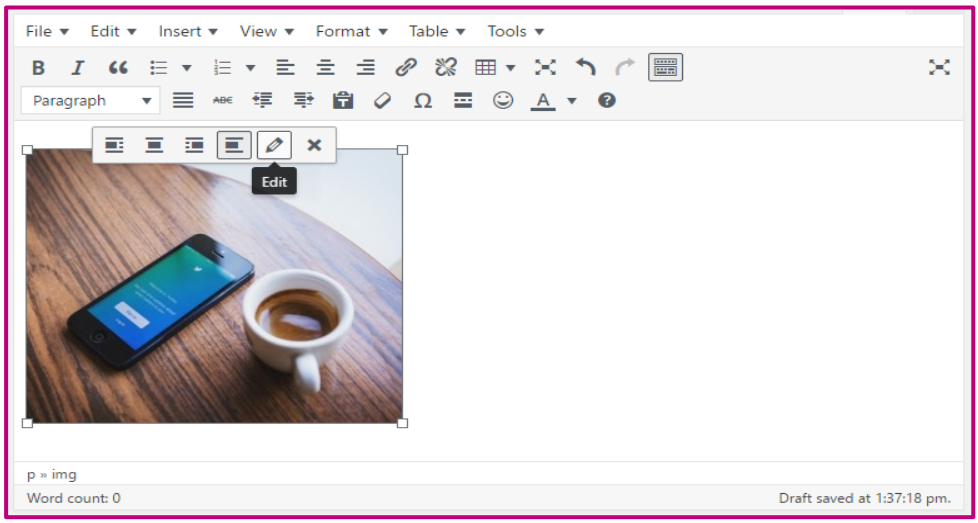
Specific size recommendations for your bespoke website can be requested from the support team, email support@phew.org.uk

Selecting images: Holding down Ctrl+Cmd and clicking will allow you to select multiple images. Click the tick to unselect any not required.

To change the Image size

- Select the Edit button
- The image will appear above the image there will be icons which allow you to:
    - crop
    - move the image 180 degrees,
    - flip it the Image
    - and you can scale the Image
- On the right-hand side you can also change the scale of the Image.
- When completed save.

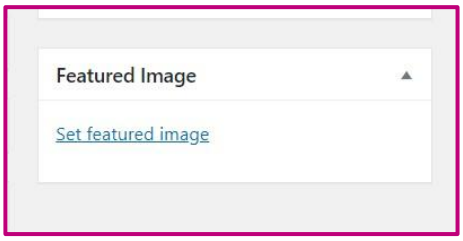
Editing or removing media from your page or post



There are various options available for adjusting the layout of inserted images. After clicking on an image that has already been inserted into your Page or Post, you will see some icons appear over the image.

Clicking the pencil icon allows you to edit the image properties.
Clicking the right icon (x) will delete the image from your content. It will only remove the image from your Page or Post, it will not delete the image from your Media Library.

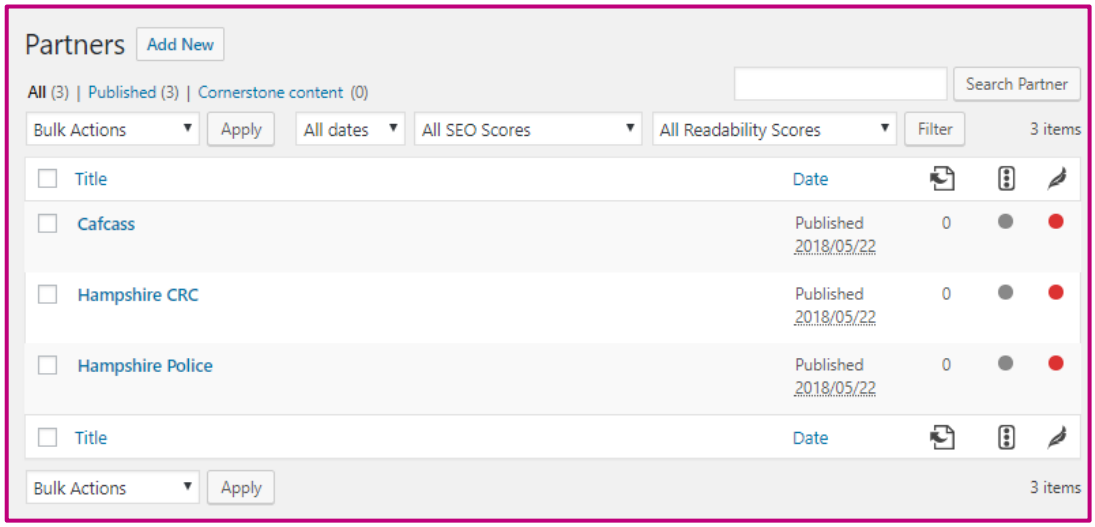
Setting a featured image



Some themes allow you to specify a Featured Image for your Page and Post. A Featured Image, often called a Post or Page Thumbnail, is usually some sort of image that is representative for that Page or Post.
How these images are displayed is dependent entirely on the design and make-up of your website.

Partners

Your site might not be set up to use Partners.



Like Pages, at the top of the page you can view how many Partners in total you have in your site and how many are published.

To add a new Partner

- Select the Add New button at the top of the Partners page
- Add the Partners title
- Add the Partners Logo (this will have been added to the media library.
- On the right-hand you can publish and or save as a draft like the Pages and Posts.

To edit or remove or view any Partners

This works in the same way as Pages and Posts.

Documents and resources

Add new document,

- Select the Add New button at the top of the Partners page
- Add the Partners title
- Add the Partners Logo (this will have been added to the media library.
- On the right-hand you can publish and or save as a draft like the Pages and Posts.

Categories you will choose a category only if your site is set up to use them.

Resources and documents work in the same way except that for resources you will need to log on to the web site

Testimonials

Work in the same fashion as Partners.

Your site might not be set up to use testimonials.

Comments

If you would like the visitors to you site to make a comment about the content, news feed. By giving your visitors this ability, it will allow them to add their feedback to your site or potentially ask questions.

Remember if you have this option you could have very visible negative content on your site.

There is an Approval Unapprove option before posting the comment, but you will have to manage this.

Users

From users, you can set up a profile for other members of staff. This profile will allow them to login to the site and make certain changes based on their specified role. We would recommend giving the Administrator role to minimal members of staff.

Summary of roles:

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

Most sites only have administrators set up if you require any other information you will need to contact your Phew project manager.

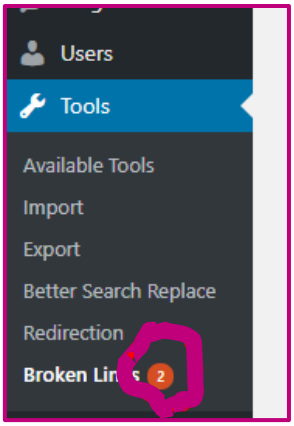
Appearance, Plugins, Tools, Setting, custom fields and options

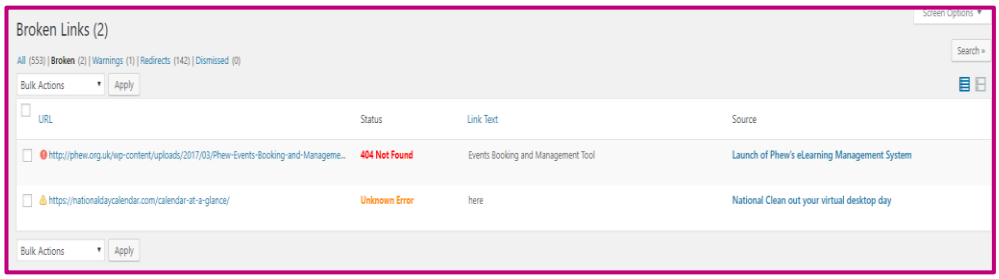
We mainly manage these for you as part of your support contract and are part of the site Design. If you need any changes you need to email support@phew.org.uk

- Themes
- Customize
- Widgets
- Menus
- Install Plugins
- Theme Editor
- Available Tools
- Import
- Export
- Site Health
- Rege. Thumbnails
- Export Personal Data
- Erase Personal Data
- General
- Writing
- Reading
- Discussion
- Media
- Permalinks
- Privacy
- Phew Forms Setup
- Relevanssi
- User role editor

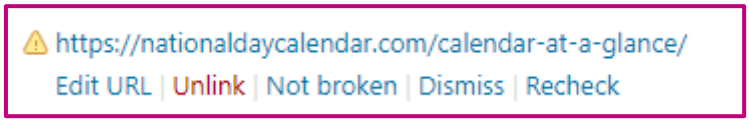
- Google Fonts
- Field groups
- Add New
- Tools
- Updates

Broken Link Checker





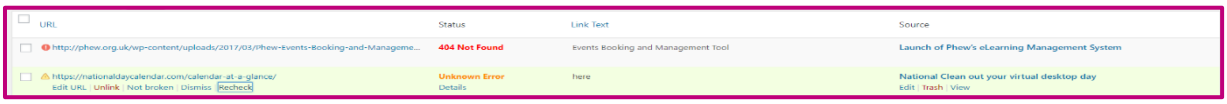
If made available to your site, we install a plugin titled Broken Link Checker.
You can find this on the left-hand side tab of your WordPress website. We will be able to notify you if any of these links are broken. We would recommend that whenever you use your website you check this Broken Links on the left-hand side which will display a number if there are links to look at.
As you can see, we currently have two broken links to look at.
These links are displayed above and there are a few ways you can amend these links. If you were to hover over one you would get the following options.



- Edit URL: if you find there to be a mistake with the website or URL you can use this to amend it.
- Unlink: sometimes websites are completely closed or removed so you are no longer able to find a new version. This is when it is most likely going to be the case to just completely remove the link.
- Not broken once you can have that the link is fine you can use this, and it will recheck it again and ensure that it is not broken.
- Dismiss: it is possible to completely dismiss the broken link.

✓ we would not recommend doing this and trying to repair the issue elsewhere.

- Recheck: It is quite often the case that the website in question may have been down for maintenance at the time of the Broken link check. It is always worth double checking to see if it is not actually broken or was just being slow. If the recheck is fine and there are no further issues, then it will flash green, but it may be worth just opening the link up in a new tab as well.



Content tips

Images

- When uploading images please ensure there are no spaces in the image name. This is to try and avoid broken images on the site, i.e. example-image-2017.jpg instead of example image 2017.jpg.
- Where possible it is better to resize and crop and image before you upload it. WordPress won't factor in what looks nice, just what fits.
- Try to give your images a logical and relevant name. Where possible, try to include the name of the page where the image is going i.e. on Planning & Development, you should name the heading image Planning-and-development.jpg. It is more effective for SEO than image1234.jpg.
- Use .jpg and .png formats for images better quality for the web.

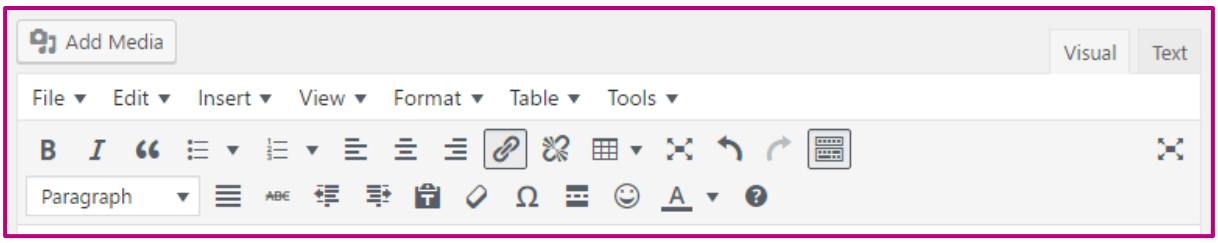
Text

- Do not paste text into WordPress directly from Word or any other publishing software. The formatting in Word will be carried over into WordPress and will not translate appropriately causing formatting problems. Use the paste as plain text button , this will strip everything out.
- If you do paste straight from Word, you can use the rubber tool to remove all formatting.
- Where possible, try and create internal links to different parts of the site.
- Use Headings two and three to create sections on each page.

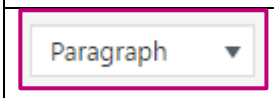
Appendices

Formatting

You have the following formatting tools available on posts, pages, case studies and homepage:



Add Media	Add images, pdfs directly into content
Visual Text	Amend content with editor or plain HTML
B	Bold
I	Italic
“	Insert block quote
	Bullet point
	Numbering
	Insert block quote
	Left align, centre align, right align
	Link and or unlink
	Insert table
	View in full screen

	Undo and or redo.
	Reveal bottom layer of options.
	Chose text format
	Full align
	Strikethrough text
	Decrease and or increase indent
	Paste as text
	Clear formatting
	Insert a special character
	Insert more tag, insert page break
	Insert an emoticon
	Change the text colour
	Explain keyboard shortcuts

Terminology

content management system	CMS

Phew!
WEBSITES

Accessibility

Here is a sample of things to consider for accessibility.

- Language can be the most welcoming or the most excluding form of communication.
- When we make language accessible to people with cognitive disabilities, we make it accessible to everyone.
- Using accessible language is your chance to provide material in a way that welcomes people with cognitive disabilities into a positive experience.
- Make your point quickly.
    - The fewer words the better.
- Organise your topics in an order that makes sense.
- Make a personal connection.
    - Clearly state why your information is important to the reader and what you want them to do.
- Include lots of white space
- Follow big words or acronyms with a definition in brackets.
    - Sometimes you must use big words or “lingo”.
    - Remember to include the definition every time even if you have already explained the word
- Use short words and sentences.
  e.g. “show” instead of “demonstrate.”
- Use pictures that go with the subject you are discussing.
    - Graphics can be a great tool for understanding difficult ideas and concepts.
- Use People First Language.
        - Language can really hurt people when used the wrong way.
        - Nobody likes to be labelled!
        - People First Language refers to an individual as a person before their label.

e.g. use “she is a person with a disability” instead of “she is disabled.”

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This document is maintained as an electronic document.

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Ver 2	1.0	01/07/2018	Updated	
Ver 3		Dec 2019	Complete review of the manual and structure and update to mark new features.	

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