



WORDPRESS

Utilizing WordPress & Updating Your Website

USER GUIDE

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Access Idaho

Phone: 208-332-0102
Toll-Free: 877-443-3468
creative@accessidaho.org
<https://accessidaho.org>

Office of Information Technology Services (ITS)

Phone: 208-332-1503
webmaster@idaho.gov
<https://its.idaho.gov>

More resources at: webmaster.idaho.gov

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SECTION 1 - THE BASICS

1a • ABOUT WORDPRESS

BENEFITS

By using the official templates built by Access Idaho, your website is fully responsive, meaning that it transitions from cell phone, to tablet, to desktop computer seamlessly.

- No confusing development, just simple drag and drop front-side editing is all you need to do.
- Add images, files, edit content, and new pages easily!
- Update the website on any computer, in any browser, at any time! All you need is your user name & password we provide to you & an Internet connection.
- WordPress is open source, which means no large software fee for you!
- Ongoing support for any questions/help you may need is provided locally by Access Idaho or the Office of Information Technology Services (ITS).



GETTING STARTED

User Name and Password

Your user name and password have been provided to you. Do not give your user name and password out to anyone else. If you need an additional user name and password for additional staff to update the website, please contact us (creative@accessidaho.org) and we will be happy to provide you with one.

What is Needed to Update a WordPress Website

- A computer
 - If using a Windows computer, it will preferably be running at least Windows 7. If your computer has an older operating system, you may have some issues viewing and updating the website in outdated browsers.
 - If you are using Internet Explorer as your browser, you must have at least **IE 10**, but preferably you will have the latest version downloaded, or use a different browser such as Chrome or Firefox.
- An Internet connection (**must be on the state network or VPN**).
- Your user name and password to log in.

No other special FTP or code-editing software is needed to update your website. If you plan to do photo editing, we suggest you use Adobe Photoshop (*purchase or subscription required* - [contact www.its.idaho.gov/purchasing](http://www.its.idaho.gov/purchasing)) or download GIMP (*free*) - www.gimp.org/downloads

WHAT'S THE DIFFERENCE BETWEEN THE 2.1 & 3.0 THEMES?

- The v2.x theme uses Bootstrap version 3.3.x.
- The v3.x theme uses Bootstrap version 4.x.
- We've added many new features in the version v3 theme and will expand upon it from time-to-time.

HOW DO I KNOW WHAT TEMPLATE VERSION I AM USING?

If your website is on the State's multisite server, you should see what version you are using at



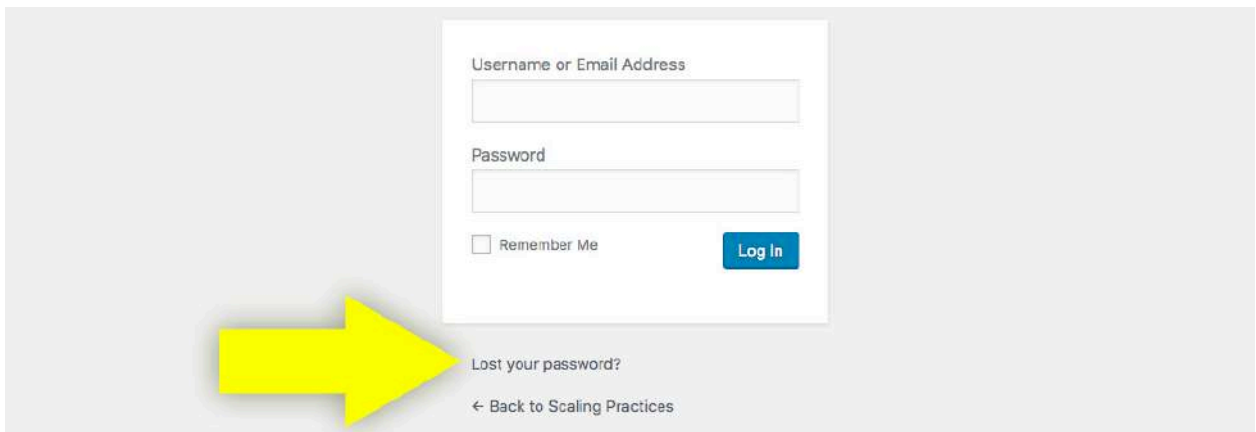
SECTION 1 - THE BASICS

1b • LOGGING IN & OUT

BEFORE YOU BEGIN The screen shots throughout this guide are of an example website, while it may not look exactly like your website does, the basic functionality is the same and many of the features are the same, but there may be some slight differences. Follow the arrows and text for an instructional guide to using your new website.

HOW TO LOG IN

1. Go to your WordPress domain in any browser (Firefox, Chrome, or Internet Explorer) and add "wp-admin" at the end of your URL.
Example: <https://multisite.idaho.gov/agency-name-or-abbreviation/wp-admin/> or <https://agency-name-or-abbreviation.idaho.gov/wp-admin/>
2. Enter your user name and password that Access Idaho or ITS provided to you for your WordPress website.
3. If you forgot your password, click "Lost your password?" and enter the email you use for the website (most likely your state or work email address).



Do not share your user name and password with others. If you have additional staff that needs access to update the website, contact Access Idaho or ITS and we will gladly set up additional user names and passwords for you.

HOW TO LOG OUT

1. In the top right corner you will see "Howdy *Your User Name*"; hover over this and you will see a link to log out. Click this link.



SECTION 1 - THE BASICS

1c • WEBSITE BEST PRACTICES

SEMANTIC STRUCTURE

Good semantic structure will make your website easier for a user to read and for a search engine to scan and show content in search results. A good outline structure is important, follow the guidelines below and use this tool to check your outline structure -

<https://validator.w3.org/nu/?showoutline=yes>

Paragraph body text <p> - This will be the majority of the text on your page. All text that is not a heading will most likely utilize this or a list.

Heading 1 <h1> - Only used for the page title (this is included by default in the template). Do not use a H1 more than once on a webpage.

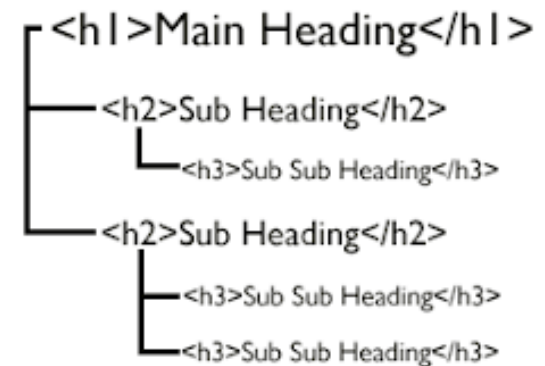
Heading 2 <h2> - Can be used multiple times for sub headings of equal weight or value.

Heading 3 <h3> - Should be used for any sub headings under H2s.

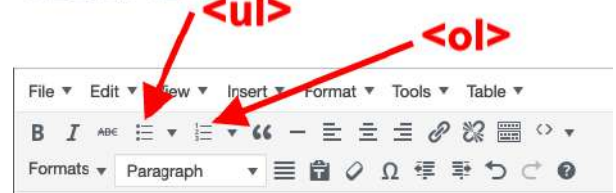
Heading 4 <h4> - Should be used for any sub headings under H3s.

Heading 5 & 6 <h5> & <h6> - Smaller sub headings, many times these are not used.

**Lists & ** - Unordered lists (bullet points) should be used when there is no order of sequence or importance. Ordered lists (numbered or lettered) suggest a progression or sequence. Lists should never be used for merely indenting or other layout purposes.



Add title



classic editor view

Screen reader and other assistive technology users also have the ability to navigate web pages by heading structure, assuming true headings are used (as opposed to text that is styled to be big and/or bold). This means that the user can view a list of all of the headings on the page, or can read or jump by headings, or even navigate directly to top level headings (<h1>), next level headings (<h2>), third level headings (<h3>), and so on.

For more in-depth information see: <https://webaim.org/techniques/semanticstructure/>

IMPORTANT INFORMATION

- Do not use text formatting, such as font size or bold to give the visual appearance of headings - use actual heading (<h1> - <h6>) for all content headings.
- **Heading levels should not be skipped!**

SECTION 1 - THE BASICS

1c • WEBSITE BEST PRACTICES

GENERAL TIPS

- Include the most important information in the first two paragraphs
- Use the supplied headings and subheadings in the template
- Group small amounts of related information visually
- Use bulleted and numbered lists frequently

WRITE FOR SCANNING

Web visitors skim web pages to find the information they want. Even under great conditions, your customers will read about 28% of the text on a page.

KEEP IT SHORT

Want your content to be read and understood? Keep it short. You can achieve a 58% increase in usability simply by cutting your words in half.

- Start with your most important point.
- Focus your message and delete unnecessary information.
- Use shorter words that are easy to understand.
- Shorten your paragraphs and sentences.
- Test your page/site's readability - <https://www.webfx.com/tools/read-able/>

GROUP YOUR CONTENT

Users view your content in chunks, scanning it for words that match the action they are trying to accomplish. To help them find what they are looking for:

- Break your content into small sections.
- Use headings to separate the sections.
- Use the headings in order. (See the previous page about good semantics)
- Headings should use simple keywords that appeal to your audience.

WRITING YOUR LINK TEXT

Your visitors want to know what your page is about and where they can go from here. Links tell them what they can do next. People scan for headings, content groups and links, to determine what they can do and where they can click.

- Answer the question, "What will I get when I click this link?"
- Begins with keywords. People primarily look at the first two words of a link.
- Avoid generic words like click here or read more. These phrases do not communicate the content they are linked to.
- Help your search ranking, usability and accessibility by using meaningful words. If your link read aloud alone does not make sense, it will not make sense to a screen reader or help your ranking on Google.

LINK PLACEMENT

Don't make your visitors hunt through the middle of long paragraphs for your links. Place your links above a paragraph or below a paragraph or in a bullet list. Make them easy to find when you skim a page.

SECTION 1 - THE BASICS

1d • ACCESSIBILITY/508 COMPLIANCE

Compliance with ADA (Americans with Disabilities Act) is required of all web pages developed for or by the State.

- ADA (Americans with Disabilities Act)–Compliance is required.
- Section 508 of the Workforce Investment Act of 1998–Compliance is required.
- World Wide Web Consortium (W3C) Web Content Accessibility Guidelines–Must adhere to the guidelines to the fullest extent possible.

ALT TEXT

All images should include equivalent alternative text (alt text) in the markup/code. If alt text isn't provided for images, the image information is inaccessible, for example, to people who cannot see and use a screen reader that reads aloud the information on a page, including the alt text for the visual image.

Alt text should include a short description of what the image is showing, but must be more descriptive than "picture." Example of alt text for the picture to the right: "Shape of the state of Idaho."



ACCESSIBLE PDFS & DOCUMENTS

All documents on your website should be in a screen reader accessible format. For example, if the document is a pdf with text, the pdf should not be a flattened scanned image unless it is scanned using Optical Character Recognition (OCR) software. See the accessibility training section of [webmaster.idaho.gov](https://webmaster.idaho.gov/training/accessibility-training/) for more information.

<https://webmaster.idaho.gov/training/accessibility-training/>

VIDEO & AUDIO ALTERNATIVE

All video-only and audio-only content requires a text transcript. Transcripts are clearly labeled and linked below the media.

COLOR & CONTRAST

There must be a color contrast ratio of at least 4.5:1 between all text and background. Do not rely on color alone to convey information. When providing detailed instructions, make it so they aren't reliant on a single sensory ability.

The topics above are just the basics. For more information please contact Access Idaho or ITS. See G3100 - Web Publishing, section IV Accessibility Guidelines for the state standards.

<https://ita.idaho.gov/psg/g310.pdf>

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2a • MODIFYING THE WEBSITE HEADER

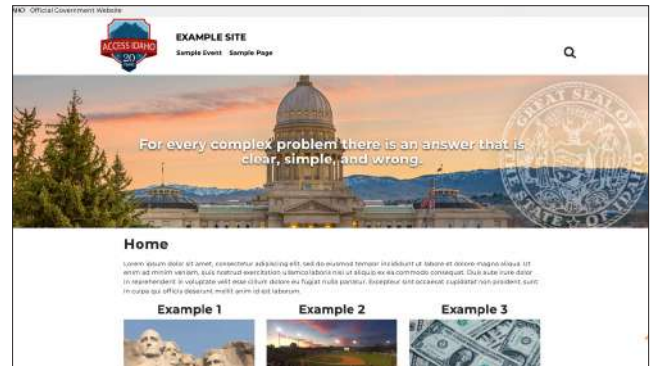
There are 2 options for the v3 themes, the original (classic) theme and the new alternate theme. The main differences are listed below:

Original v3 Theme:



- Upload a custom header image that will be on all pages
- Optional: Add your agency's logo in the header to the right of the Idaho logo

Alternate v3 Theme:



- Your agency's logo is placed at the top next to the menu
- Choice of a hero image or slider on the homepage only

ORIGINAL V3 THEME HEADER CUSTOMIZATION

The original header area has four sections that are customizable to a certain extent: the background image (1), the Agency name (2), the Agency logo (3) and the search box (4).



ALTERNATE V3 THEME HEADER CUSTOMIZATION

The alternate header area has four sections that are customizable to a certain extent: the hero image or slider (1), the Agency name (2), the Agency logo (3) and the search box (4).



CONTINUED

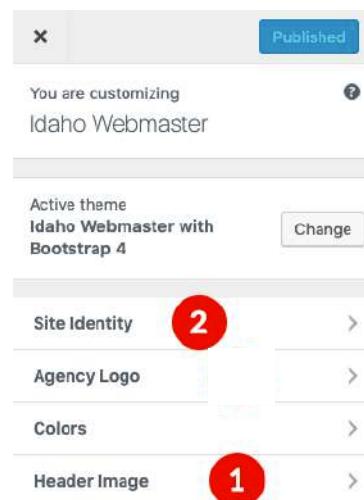
SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2a • MODIFYING THE WEBSITE HEADER

Each of these areas can be easily customized from the back-end by going to **Appearance > Customize**. Once loaded, you should see a menu on the left-hand side of the screen similar to the one shown here to the right. **NOTE:** these areas are not movable from the locations illustrated on the previous page.

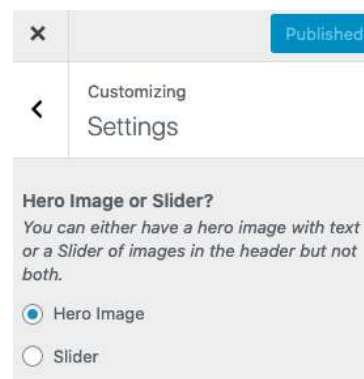
ORIGINAL V3: CHANGE HEADER

1. Click on "Header Image" in the menu **1**
2. This will reveal an area that shows the current header and has a button to allow you to upload a new image or even hide the image entirely if you would rather have a blank background. Be sure to read the instructions in that section to answer any additional questions you might have.
3. Then click the blue "Publish" button to save.



ALTERNATE V3: SET HERO IMAGE OR SLIDER

1. Click on "Settings" in the menu
2. Select "Hero Image" - a static image that will allow you to enter text over the image, or "Slider" - multiple images that will rotate through with text and can be linked.
3. If you select "Hero Image," you can enter text in the "Hero Area Text" section of the customizer. If you select "Slider," you can add the images and text to the slider by publishing your changes and going back to your dashboard. There is an option in the left Admin Menu for "Carousel Slider". See section 4e for instructions on how to manage the slider.



AGENCY NAME

1. Click on "Site Identity" in the menu **2**
2. This will reveal an area that has an input box called "Site Title" where you enter the name of your Agency as you would like it to appear.
3. The tagline is optional and the text entered in this area will appear in italics above the Agency Name you entered on the original theme, it will not appear on the alternate theme.
4. Then click the blue "Publish" button to save.



CONTINUED

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2a • MODIFYING THE WEBSITE HEADER

AGENCY LOGO

1. Click on "Agency Logo" in the menu **3**
2. This will reveal a place to upload/change the agency logo image or remove it entirely. **IMPORTANT: remember to enter ALT text for the agency logo to stay 508 compliant.**
3. Then click the blue "Publish" button to save.

NOTE: The agency logo cannot replace the Idaho logo.

SEARCH BOX

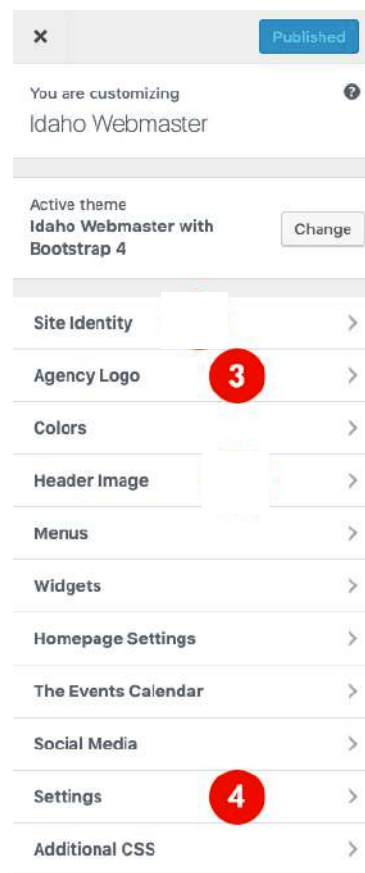
1. Click on "Settings" in the menu **4**
2. To have a search box on your website you will need to be sure to have the "Google Custom Search ID" filled in with your ID number. You can find or set up your Google Custom Search ID at <https://cse.google.com> (If you need further assistance getting a GCS ID number, please feel free to contact us).
3. Once filled in and saved the search box will appear.
4. If you would like to hide the search box once enabled, simply check the "Disable search filed" checkbox.

NOTE: If you have created a new Google Custom Search and would like the ads from the search results page removed, you can complete the following form once your search is being used in production: <https://bit.ly/2TYHPLE>

ORIGINAL V3: IDAHO LOGO IN HEADER

This graphic is available in either white or black formats. It is white by default.

1. To change it, click on the "Settings" menu item
2. Look for the checkbox labeled "Use Black Idaho Logo" **4**
3. Then click the blue "Publish" button to save.



SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2b • MODIFYING THE WEBSITE FOOTER

Your website's footer area has two different formatting options that you may choose from, either a two-column footer or a three-column footer. Each are illustrated below.

TWO-COLUMN FOOTER EXAMPLE



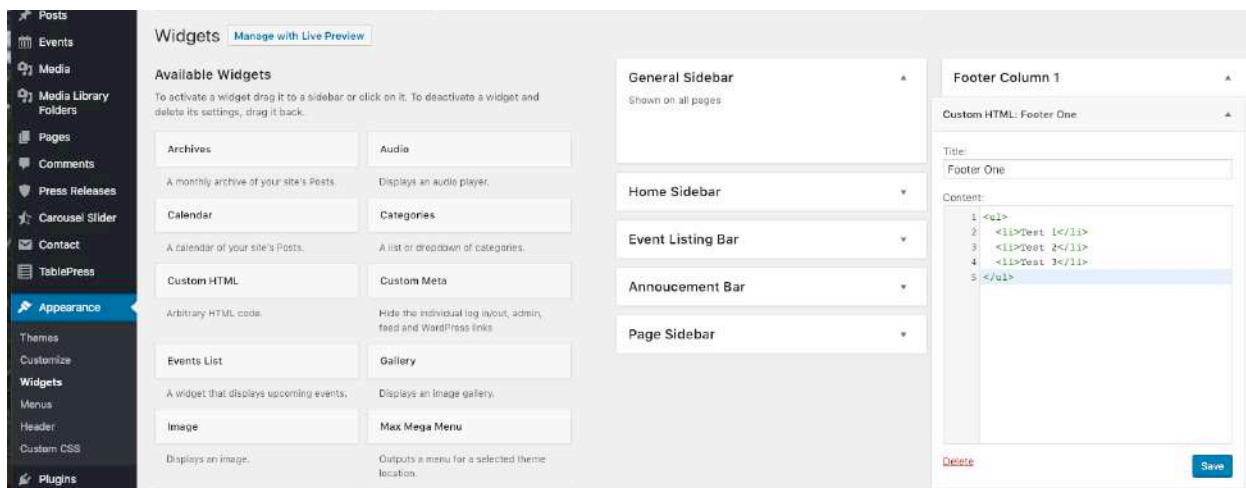
THREE-COLUMN FOOTER EXAMPLE



To modify between the choices, go to **Appearance > Customize** and then choose "Settings" from the menu that loads. Then use the drop-down found in the "Footer Layout" section. Don't forget to click the blue "Publish" button to save.

FOOTER COLUMNS

Within the Footer area, the middle area ('Footer One', etc. above) are controlled via widgets. Any available Widget found under **Appearance > Widgets** can be dragged and dropped into the numbered "Footer Column" boxes found on that screen. This is what controls what content appears there. *Although you are able to put more than one Widget within each Footer Column, you do want to be judicious about how many are there as it will extend the height of your footer area visually.*



CONTINUED

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2b • MODIFYING THE WEBSITE FOOTER

SOCIAL MEDIA AREA

Certain social media pages you would like to showcase on your site can be modified by going to **Appearance > Customize** and then choosing "Social Media" from the menu.

1. Enter the various social media IDs (not the entire web address) into the requisite input fields. Each field that is filled in will display its corresponding logo and be linked to your social media page.



Facebook ID
Your Facebook ID is the part following https://facebook.com/

Twitter Handle
Your Twitter handle is the part following with an @ symbol

Currently, the social media accounts configurable include Facebook, Twitter, Instagram, Flickr, YouTube, an RSS feed, and a general Email Contact.

2. For good Search Engine Optimization (SEO) purposes, be sure to fill in the "Website Summary Description" box with brief information about your Agency/website.
3. Upload a "Social Media Image". This image is what appears when people do searches for your site and/or link to your social media page.

The very bottom row of links (pictured below) are not configurable or removable as they are mandated by State policy to appear on all State websites.



ACTIVATING THE BACK-TO-TOP FEATURE

By default, there is no "back to top" feature that would allow a user to quickly be taken back to the top of the site but there is a togglable option to activate this feature for sites that have some extra long pages and it would be of benefit to their users: go to **Appearance > Customize** and then choose "Settings" from the menu. At the bottom you will see the checkbox to activate this setting: "use 'back to top' feature".



Colors >
Header Image >
Menus >
Widgets >
Homepage Settings >
The Events Calendar >
Social Media >
Settings >
Simple Custom CSS >
Additional CSS >

Website Summary Description
This summary text is used to describe your website accurately for social media.

Social Media Image
A visual image that is shown with your social media share. Max size is 1200 x 900.


Footer Layout
This determines the footer layout at the bottom of the page
Two column footer
☒ Use Black Idaho Logo
Switches the idaho logo from white to black.
☐ Disable search field
This will hide the search field in the header on every page.
☐ Use "Back to Top" feature
This will initiate the Back to Top feature.

CONTINUED

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2b • MODIFYING THE WEBSITE FOOTER

USA SHAPE IN FOOTER

This graphic is available in either white or black formats. It is white by default.

1. To change it, click on the "Settings" menu item
2. Look for the checkbox labeled "Use Black USA Map"
3. Then click the blue "Publish" button to save.

☐ Use Black USA Map
Switches the USA map from white to black.



SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2c • MODIFYING THE COLOR THEME

The v3 template comes with three predefined color choices which change various aspects of the visual look of your website. To modify the color theme, go to **Appearance > Customize** and then choose “Colors” from the menu. This will reveal a drop-down with the three choices available and illustrated below.

CLASSIC COLOR THEME



MODERN COLOR THEME

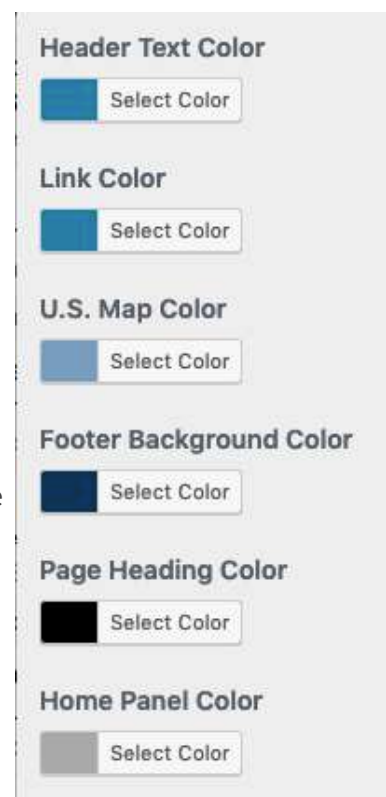


NATURE COLOR THEME



If you want to further customize the color choices for the various elements showcased to the right, you can modify each one by going to **Appearance > Customize** and then selecting “Colors”.

From there, under the section you want to modify, click the “Select Color” button and choose your appropriate color. Once you’ve made all your selections don’t forget to click the blue “Publish” button to save your choice(s).

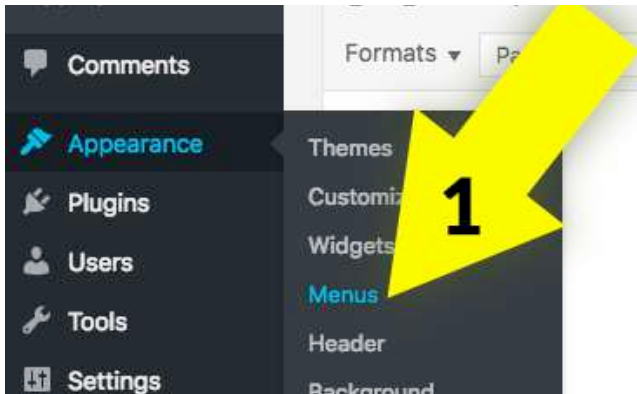


SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

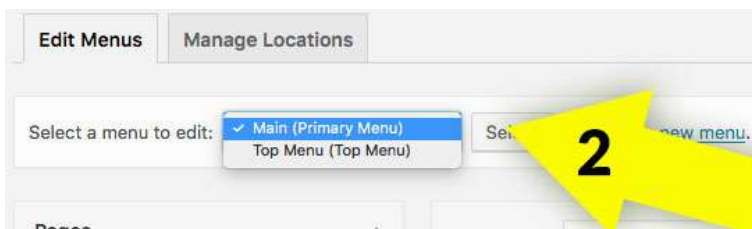
2d • EDIT/MODIFY THE MAIN MENU

ADD AN INTERNAL PAGE TO THE MAIN MENU

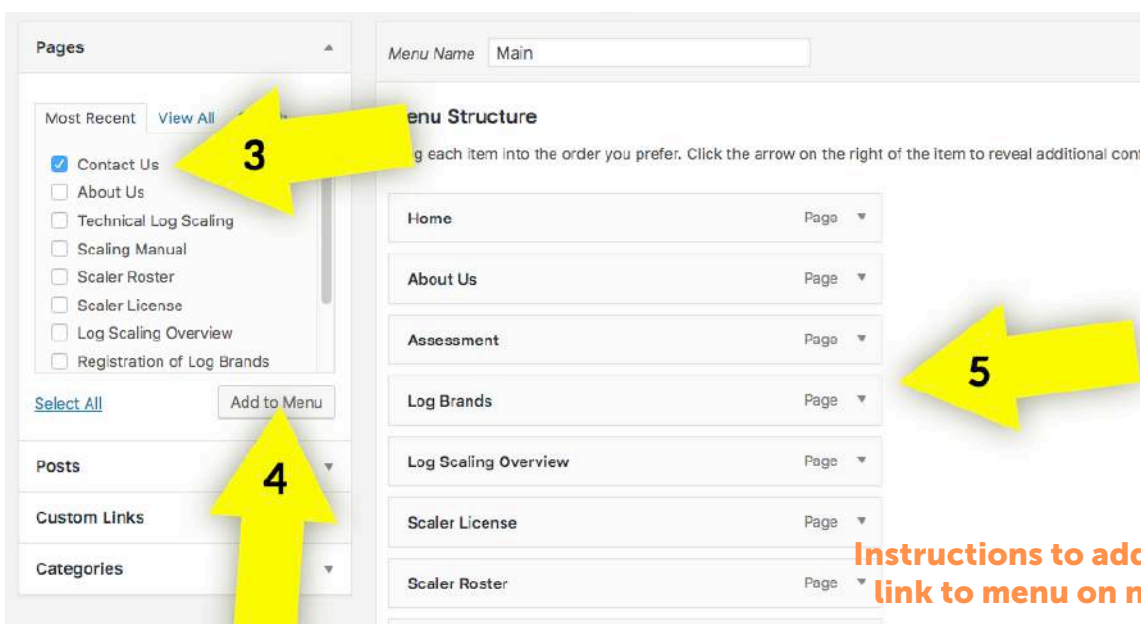
1. Hover over Appearance in the left menu and click "Menus".



2. You may have multiple menus on your website. To edit the main menu, select the "Main (Primary Menu)" from the drop-down box and click the gray select button.



3. In the left column, you can select the page(s) you want to add to the menu.
4. Click the "Add to Menu" button.
5. You can click and drag any of the menu items to re-order the menu.
6. Click the blue "Save Menu" button when you are complete.



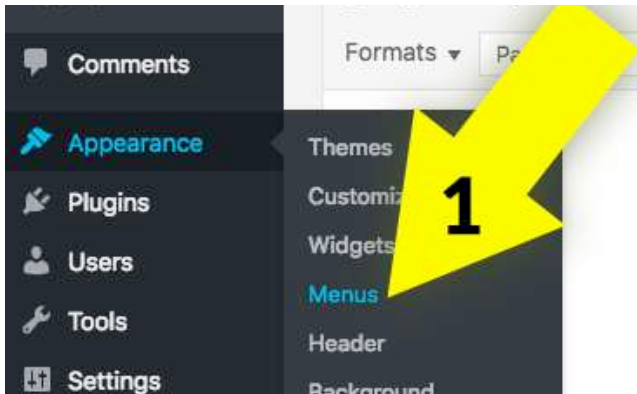
Instructions to add external link to menu on next page.

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

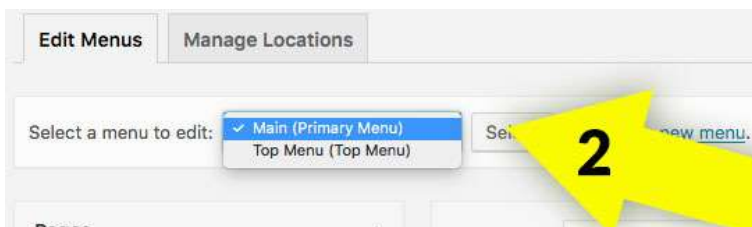
2d • EDIT/MODIFY THE MAIN MENU

ADD AN EXTERNAL PAGE TO THE MAIN MENU

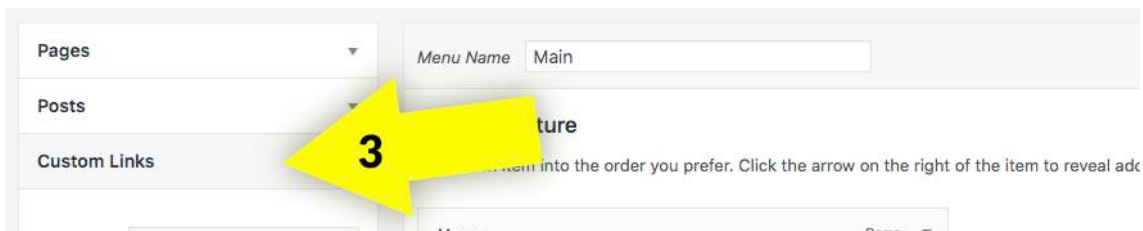
1. Hover over Appearance in the left menu and click "Menus".



2. You may have multiple menus on your website. To edit the main menu, select the "Main (Primary Menu)" from the drop-down box and click the gray select button.



3. In the left column, click on "Custom Links".



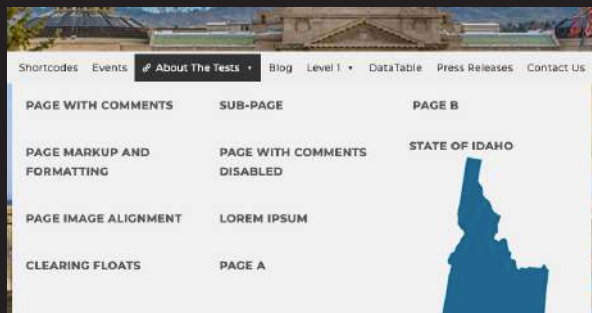
4. In the URL field, you can type or paste the URL of the external link you want to add to the menu. Type the text you want to appear in the menu in the Link Text field.
5. Click the blue "Save Menu" button when you are complete.

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2e • SET UP A MEGA MENU

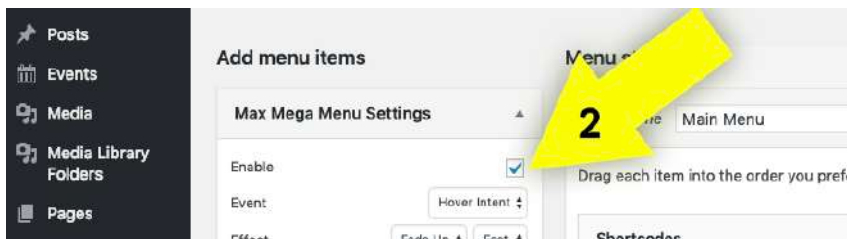
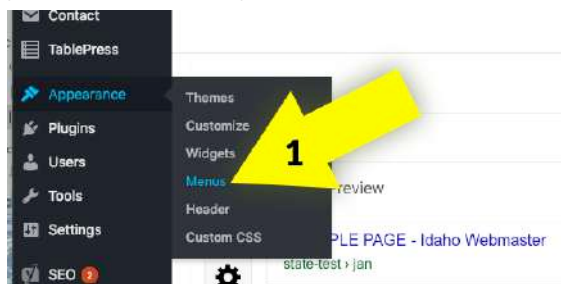
WHAT IS A MEGA MENU?

A Mega Menu is a drop-down menu with multi-level expansion that lets you pack a larger selection of your website's navigation into a single menu item. A mega menu allows visitors to reach even the deepest sections of a website through the main menu. Rather than just a basic vertical/drop-down layout, a mega menu allows for grid design, icon and image incorporations under one heading.

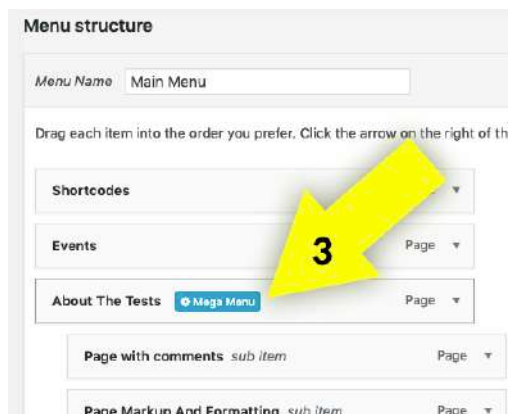


NOTE: Not every website has need of or use for the mega menu. Large websites with lots of content are better fit for mega menus. If this doesn't apply to your website than you can skip this section.

1. Hover over Appearance in the left menu and click "Menus".
2. On the loaded screen you will see two new columns next to the left menu: "Add menu items" and "Menu structure". Under "Add menu items" you should see a section labeled "Max Mega Menu Settings". Expand that section, if it's not already, and check the "Enable" box followed by clicking the blue Save button. This will activate the Mega Menu aspects for your website. (**NOTE:** be sure that the theme selected is the "Idaho" one).



3. Once the Mega Menu is activated, you determine which area(s) of your "Main Menu" you would like to format as a mega menu. To do so, hover your mouse over the main menu section you'd like to stylize as a mega menu. A blue button labeled "mega menu" should appear. Click on it.

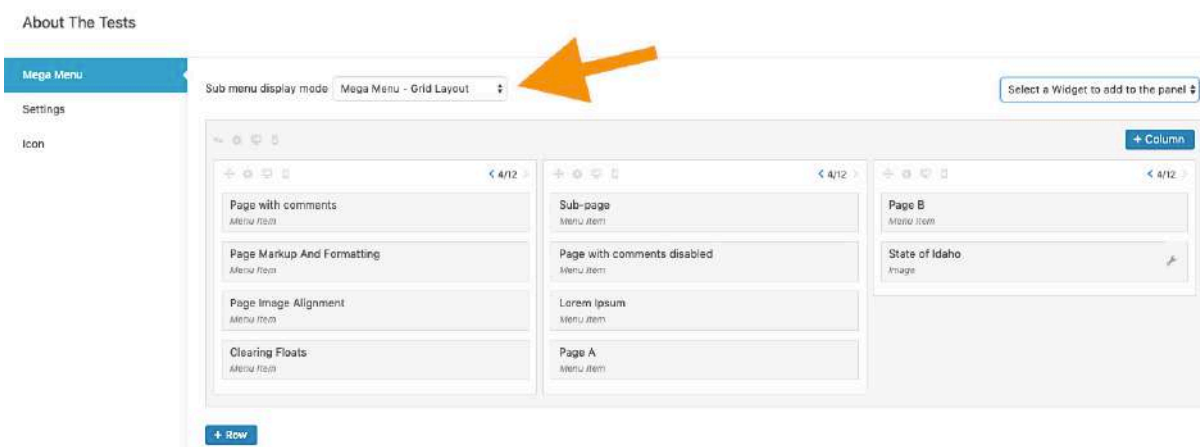


CONTINUED

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2e • SET UP A MEGA MENU

- The pop-up that appears will give you various formatting and setting choices for your selected Mega Menu. The first choice you must decide on is how the sub-menus underneath the selected menu will be displayed: fly-out, grid layout, or standard mega menu layout. The “flyout” choice is the basic pop down appearance that is similar to the standard submenu for non-mega menus. The other two choices will show you how they will look as they are selected in the display mode choice drop-down selection box. (The “Grid Layout” does give you the most choices and best layout options).



- By utilizing either “Mega Menu” display mode, you will be able to not only show and layout the submenus in a more pleasing manner but you also have the choice to incorporate any available Widget into the submenu area as well.
- Once your display choice is made, you can choose any additional settings you want to active under “Settings”. (Most websites will leave all these as default).
- If you want an icon to appear in the main menu next to the selected menu item then go to the “Icon” section and chose an appropriate icon from the “Dashicons” area.
- Click the “x” in the upper-right-hand corner and the window will disappear.
- Then, either continue setting up additional mega menus for any other main menu item or, once fully complete, click the blue “Save Menu” button over on the right to fully active the newly setup Mega Menu for your website.

Once properly completed, a Mega Menu can take your navigation from the basic choice shown below left to the one shown below right:

BASIC SUBMENU DROPDOWN



MEGA MENU - GRID LAYOUT



SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

2f • EDIT/MODIFY THE MEGA MENU

NOTE: Not every website uses a mega menu, if this doesn't apply to your website than you can skip this section.

WHAT IS A MEGA MENU?

A Mega Menu is a drop-down menu with multi-level expansion that lets you pack a larger selection of your website's navigation into a single menu item. A mega menu allows visitors to reach even the deepest sections of a website through the main menu. Rather than just a basic vertical/drop-down layout, a mega menu allows for grid design, icon and image incorporations under one heading.

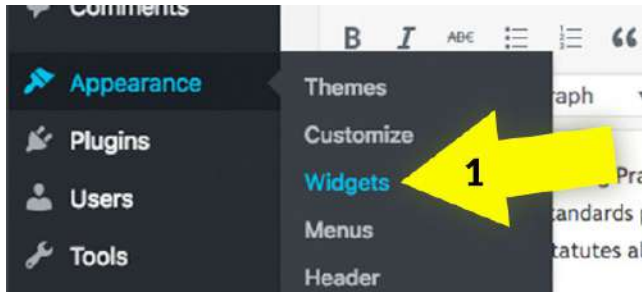


1. Edit and/or modifying a current Mega Menu is handled very similar to standard Menus (Section 2d), the adding of the actual pages/posts and organization is handled the same way.
2. If you need to update the submenu's layout appearance and/or various settings or icon, then hover over the top-level menu item until the "Mega Menu" blue button appears and click it.
3. Update the various items within the pop-up window as needed.
4. Click the "x" in the upper-right-hand corner and then the blue "Save Menu" button.

SECTION 2 - CUSTOMIZE YOUR SITE SETTINGS

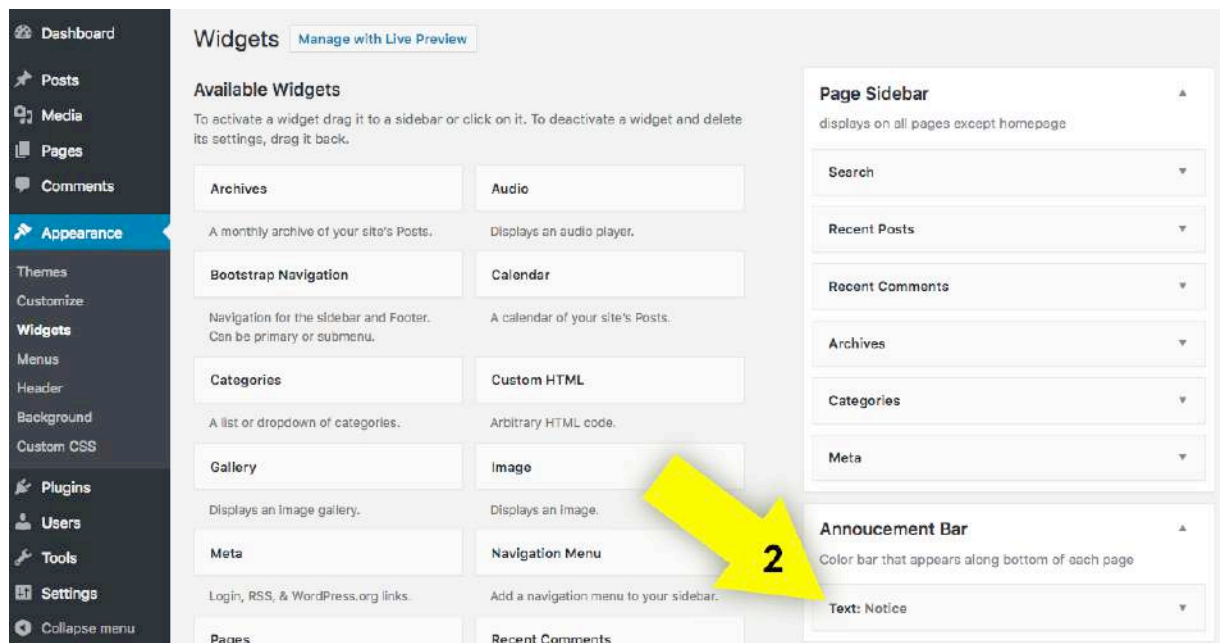
2g • WIDGETS/ANNOUNCEMENT BAR

1. Hover over Appearance in the left menu and click “Widgets”.

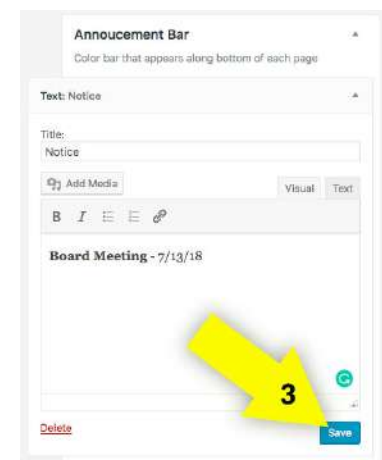


NOTE: Not every website utilizes the announcement bar section. Your site may use other widget and if you have questions about customizing them, please contact Access Idaho.

2. Find the “Announcement Bar” section and click the “Text” drop down in it.



3. You can edit the text, add documents, etc and click the blue “Save button to update the notice bar on all pages.



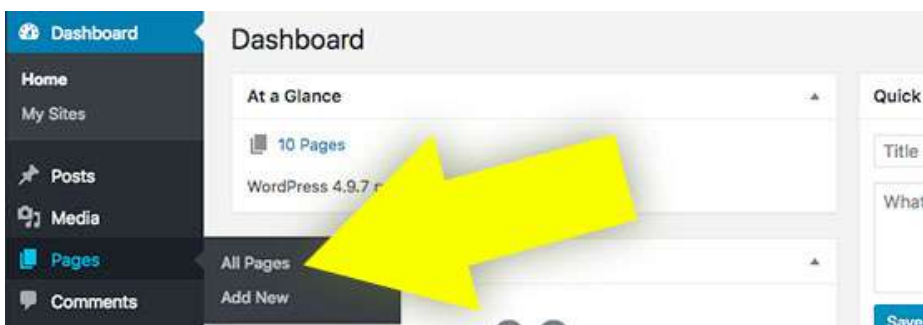
SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3a • EDIT EXISTING CONTENT

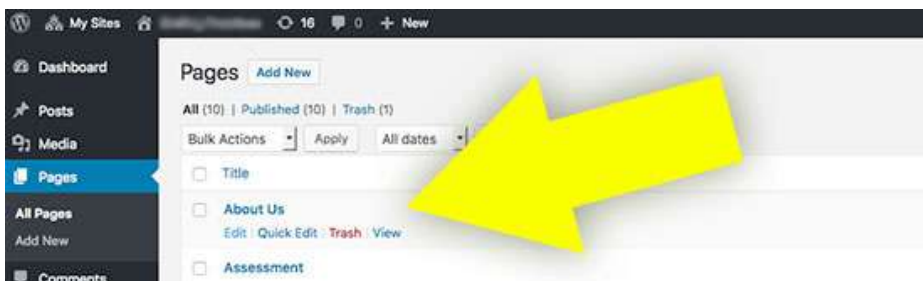
EDITING CONTENT WITH THE CLASSIC EDITOR

There are multiple page-editing widgets available. Older or custom sites may not use the same page editor as pictured in the examples in the following pages. If this is the case, please feel free to contact Access Idaho for assistance.

You are able to edit any content in the main body section of the page. Editing the content may consist of any of the following: editing text on the page, uploading new images or files, etc. To edit a page, hover over “Pages” in the side menu and click “All Pages”.



This will take you to the full list of all of the pages on your website (listed in alphabetical order by default). From here you can click on the page you wish to edit.



After clicking edit, you will typically either see the Visual or Text editor. The Visual is very similar to Microsoft Word, where you have the options to change text size, use spell-check, copy and paste, underline text, etc. The text editor is for the advanced editors that prefer to update the website in the HTML markup.



CONTINUED

SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

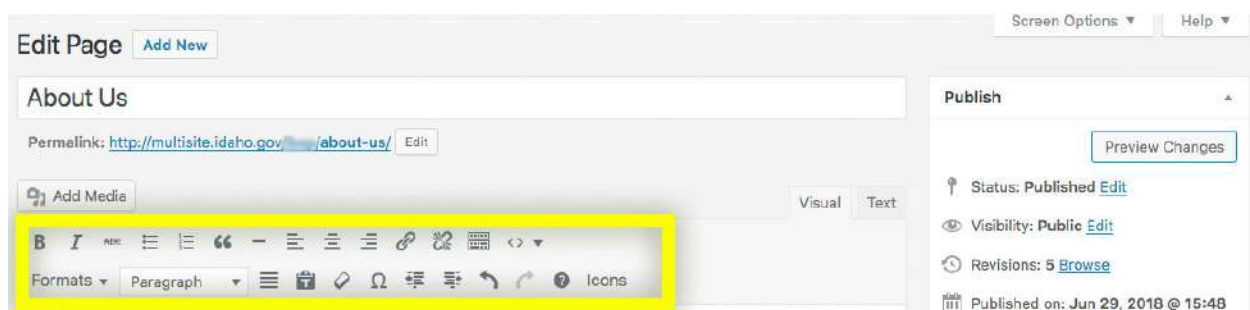
3a • EDIT EXISTING CONTENT

VISUAL TAB (CLASSIC EDITOR)

The visual editor provides a semi-WYSIWYG (What You See is What You Get) content editor that allows you to easily create, edit, and format your blog content in a view similar to that of a word processor.

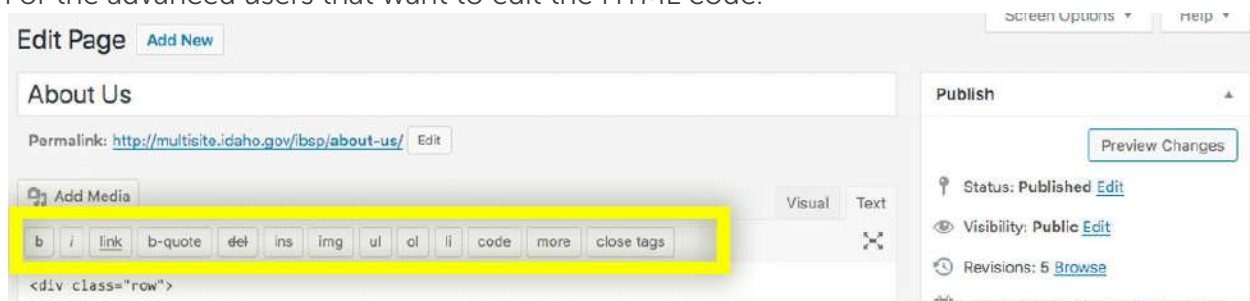
This is the default editing mode of WordPress before version 5, but if it does not appear to be enabled, you can select the Visual tab in the top right corner of the editor area, as depicted below.

If you hover over the buttons in your browser with your mouse and pause over the button for a moment, a tool tip will appear letting you know what the button does.



TEXT TAB (CLASSIC EDITOR)

For the advanced users that want to edit the HTML code.



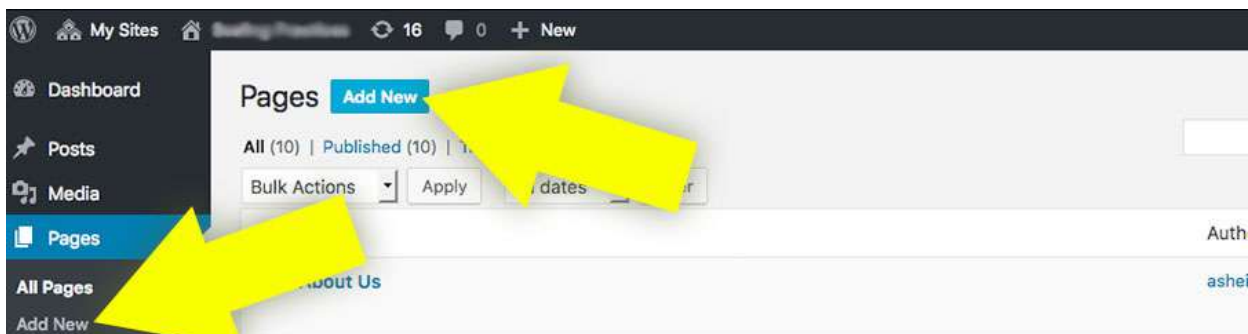
SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3b • ADD NEW WEB PAGES

CREATE A NEW WEB PAGE

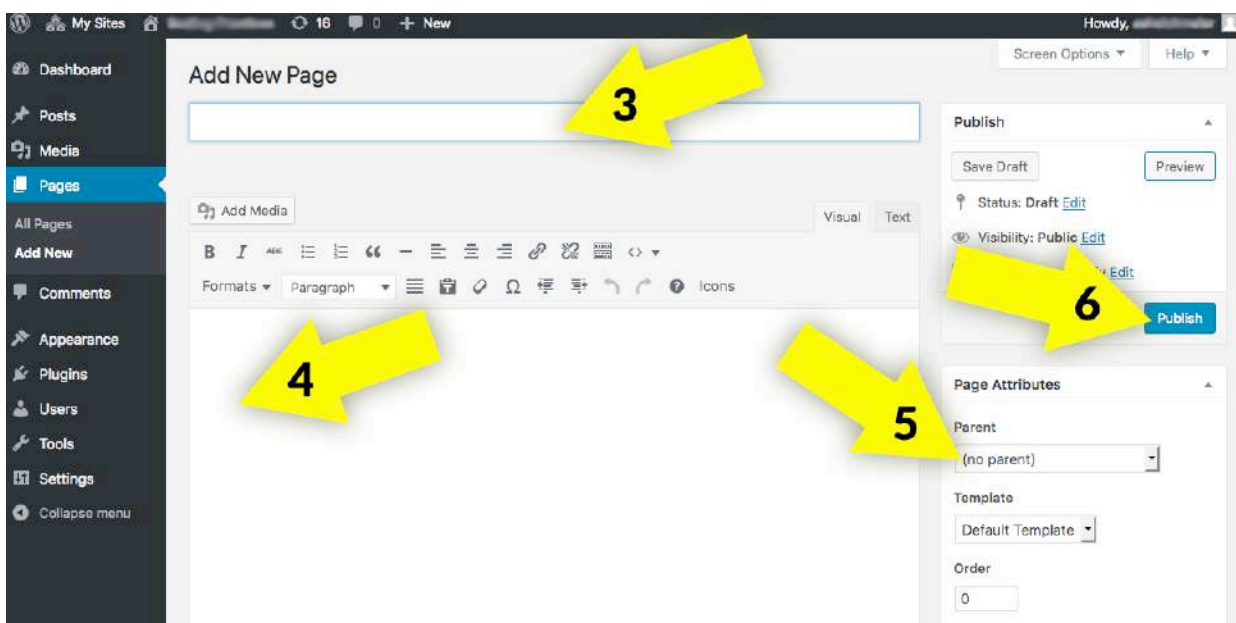
Once you are logged in to the website, there are multiple ways that you can add a new page.

1. Click on "Pages" in the left menu
2. Click on the "Add New" button at the top of the pages page, or click on the "Add New" link in the left menu.



3. Enter the page title. Be sure to keep the title specific to the contents of the page. The title you enter is what will be used to create the name of your new web page, so it needs to be specific and clear as you will be linking to it later in this guide.
4. Type in or copy and paste the contents of the web page.
5. If you are adding a page to an existing section, choose that section under the Parent menu. **NOTE: Do not list your home page as the parent item.**
6. When you are ready to publish the page, click the blue "Publish" button.

NOTE: How to add an image or a file to the page is in Section 3c. How to add the new page you created to the menu is in Section 2d.



CONTINUED

SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3b • ADD NEW WEB PAGES

PAGE TITLE AND PERMALINK URL

The Title and URL of a page are related by default. When you initially type the title of your page, the page slug (used in the permalink/URL) is automatically created. The page slug is the part of the URL between the last two forward slashes. When the default page slug is created, all letters will be converted to lowercase, spaces will be exchanged with dashes, and any special characters will be removed.



You can modify the page slug by clicking the Edit button next to it. When you're finished editing, click OK. After you are done making your changes don't forget to click the Update button to update the page and save these changes.

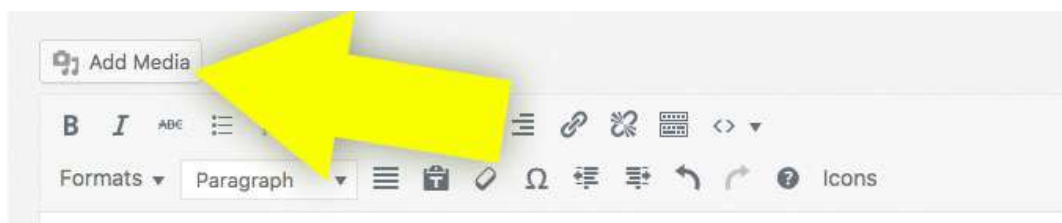
SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3c • ADD DOCUMENTS & IMAGES

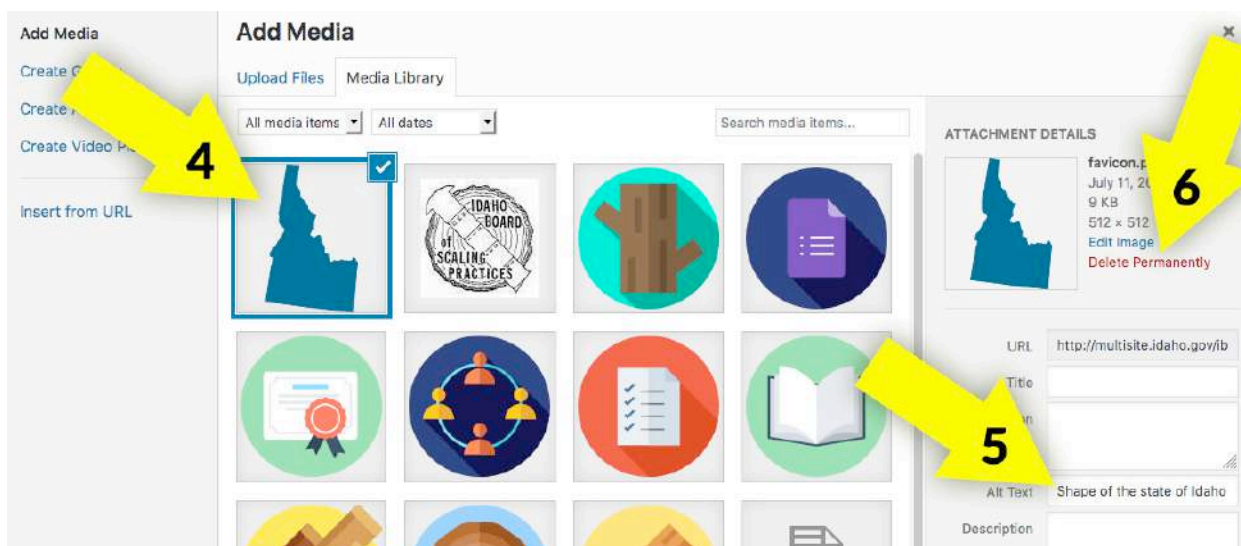
UPLOAD IMAGES FROM YOUR COMPUTER

Be sure you are in "edit" mode on the page you wish to add the image to.

1. Place your cursor where you want your image to appear.
2. Click on the "Add Media" button.



3. In the "Upload Files" Tab, you can either drag an image from your computer here or click the "Select Files" button to browse for where you saved the image you wish to upload on your computer.
4. Once you have uploaded an image, it will automatically take you to the Media Library tab and your picture will be selected. Before you insert the image into the page it is **VERY IMPORTANT** to add Alt Text to the image.
5. To add Alt Text to an image, you will type a short description of what the image is showing in the Alt Text field on the right. *Entering alternative text for images allows your site to meet certain 508 compliance standards, more specifically, if a user is viewing your website with a screen reader and cannot see the image, the screen reader reads the alternative text attached to the image to let the user know what is on the page.*
6. You can also edit or delete the image permanently. If you wish to crop, rotate, or flip the image you uploaded click the edit button. **NOTE:** *This editor will not automatically make the file size of the image smaller.* If you upload a large image and it loads very slowly on the web site, you should optimize it by opening it from the Media Library and clicking the "Smush" button. If you replace an image with a newer one, you will want to use the "Delete Permanently" link to remove the old image you updated.

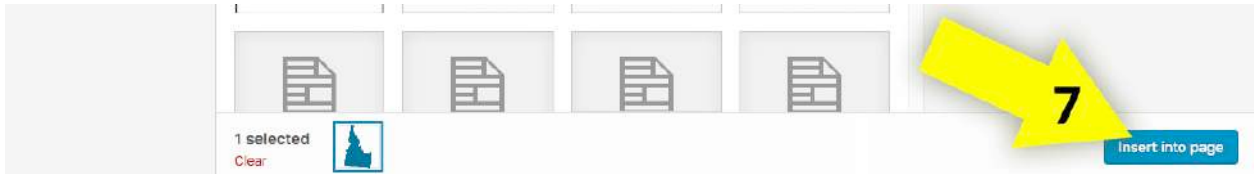


CONTINUED

SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3c • ADD DOCUMENTS & IMAGES

7. To insert the image into the page where your cursor is, click the blue "Insert into page" button.



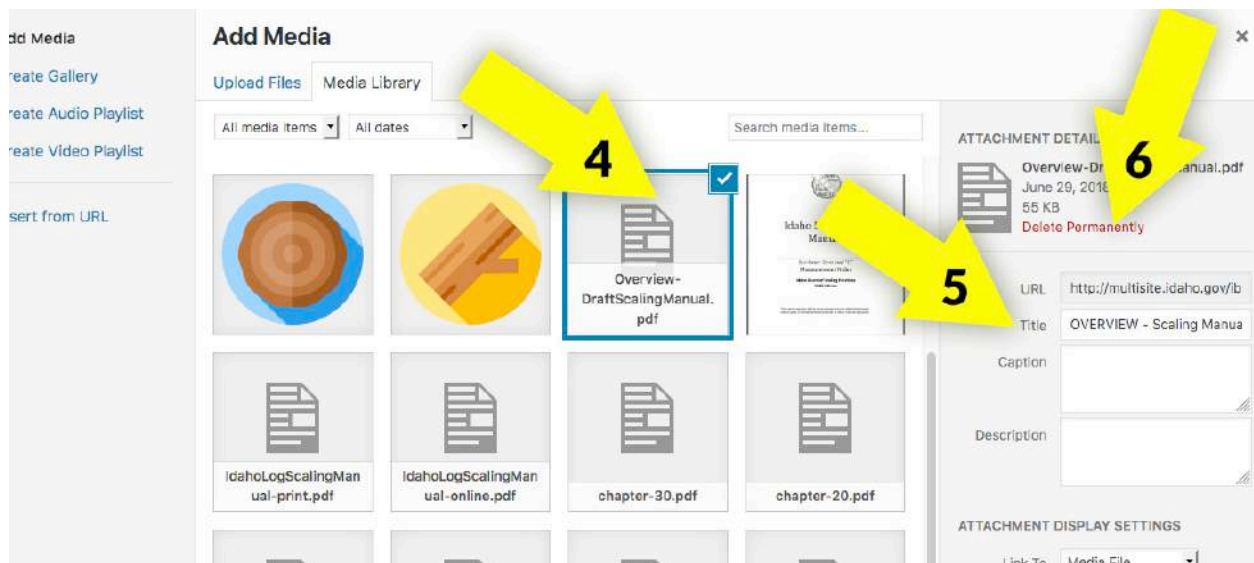
UPLOAD DOCUMENTS/FILES FROM YOUR COMPUTER

Similar to uploading an image, you will need to be in "edit" mode on the page you wish to add the document/file to.

1. Place your cursor where you want your document to appear.
2. Click on the "Add Media" button.



3. In the "Upload Files" Tab, you can either drag the file from your computer here or click the "Select Files" button to browse for where you saved the file you wish to upload on your computer.
4. Once you have uploaded a file, it will automatically take you to the Media Library tab and your document will be selected.
5. Before you insert the document into the page, you can change the title of the document to what you would like to appear as the link that user will click on.
6. You can also delete the document permanently. If you replace a file with a newer one, you will want to use the "Delete Permanently" link to remove the old file you updated.



CONTINUED

SECTION 3 - EDITING YOUR SITE - *CLASSIC EDITOR*

3c • ADD DOCUMENTS & IMAGES

7. To insert the file into the page where you cursor is, click the blue “Insert into page” button.



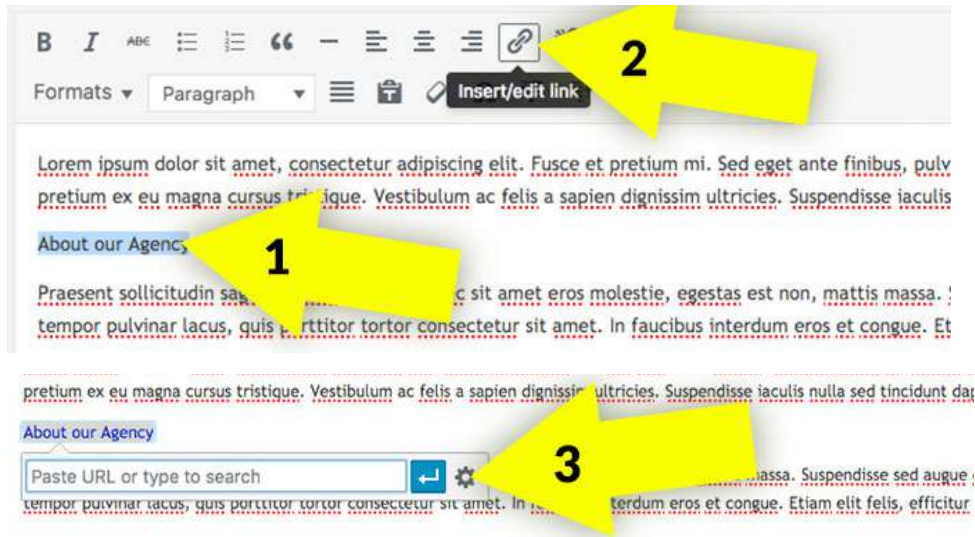
SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3d • ADD EXTERNAL & INTERNAL LINKS

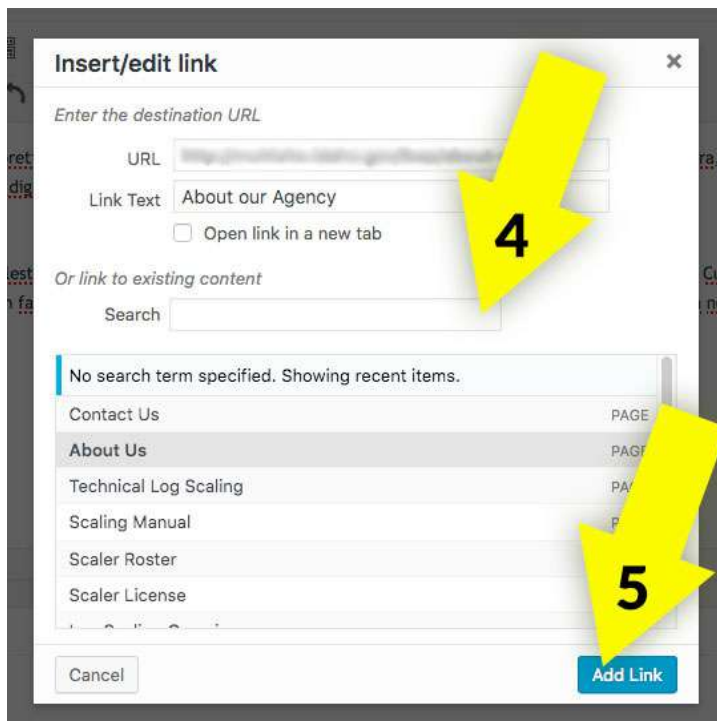
INTERNAL LINK (PAGE ON YOUR SITE)

Be sure you are in “edit” mode on the page you wish to add the link to.

1. Highlight the text or image you wish to add the internal link to.
2. Click the link button in the visual tool-bar.
3. Click the gear icon in the box that pops up.



4. In the new box that appears, you can search for the internal page you want to link to or scroll down the list and select it.
5. Click the blue “Add Link” button to add the link to the text on the page.



Instructions to link to an external page from your website on next page.

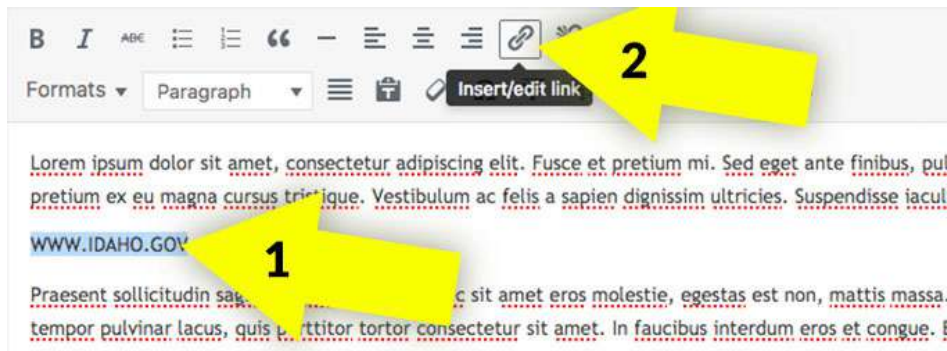
SECTION 3 - EDITING YOUR SITE - CLASSIC EDITOR

3d • ADD EXTERNAL & INTERNAL LINKS

EXTERNAL LINK

Be sure you are in “edit” mode on the page you wish to add the link to.

1. Highlight the text or image you wish to add the external link to.
2. Click the link button that shows for the Editor you’re using.



3. Type or paste the URL you want to link to in the box that appears.
4. If you would like the link to open in a new tab in the user’s browser when they click on it, click the gear icon and in the new box, click the “Open link in a new tab” check box.



SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

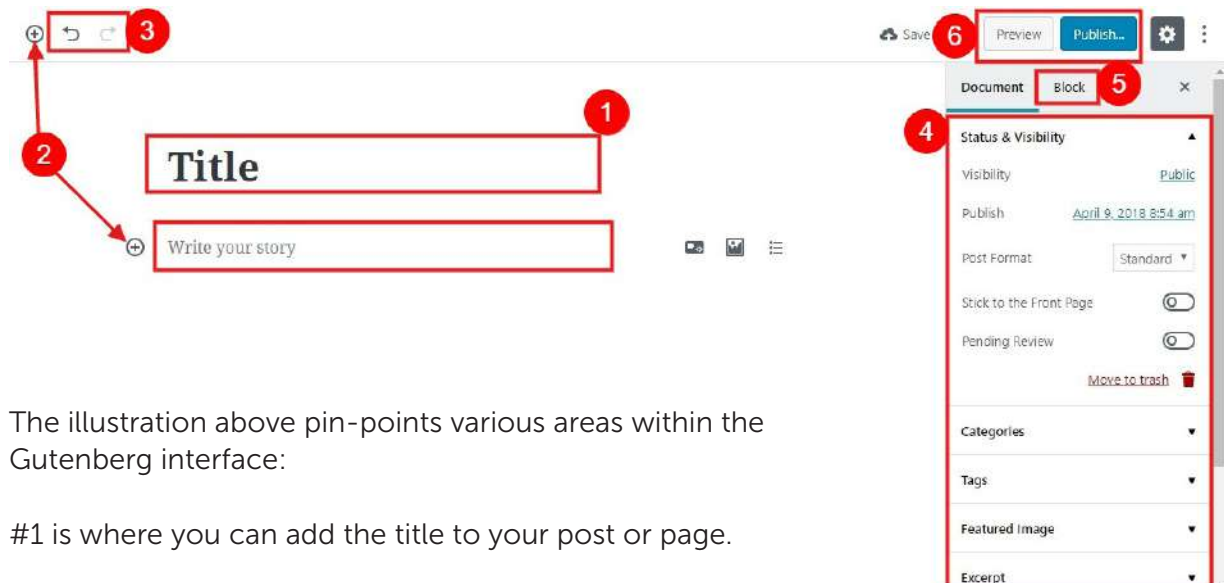
3e • EDIT EXISTING CONTENT

THE BLOCK (GUTENBERG) EDITOR

In WordPress 5.0, the classic content editor was replaced with a brand new block editor, known as Gutenberg. The new editor uses a totally different approach, called 'Blocks' (hence, the name Block Editor). Blocks are content elements that you add to the edit screen to create content layouts. Each item you add to your post or page is a block. You can add blocks for each paragraph, images, videos, galleries, audio, lists, and more. There are blocks for all common content elements and more can be added by WordPress plugins.

The main difference between this editing interface and the "classic" one is the input area with different blocks for various kinds of content type.

Currently, there are two ways to insert blocks into your posts and pages. At the top of the page there is a tool-bar with a (+) icon (#2 in the illustration below). Clicking this will pop open a box where you can search for blocks and insert them. There is also a block inserter shown when you click above, below or in between blocks already in your editor.



The illustration above pin-points various areas within the Gutenberg interface:

#1 is where you can add the title to your post or page.

#3 are the undo/redo buttons, which allow you to move forward as well as backward and thus helps to edit the contents easily.

On the right side of the screen you'll notice a new sidebar called the Inspector that has been added. This sidebar holds the settings for your page as a whole, as well as individual block settings. All of the page-level options such as categories, tags, featured image and post attributes are now available in the Document view of the sidebar.

#4 is the Settings area that includes options that are similar to that of the Classic Editor. From here, you can add the featured image, tags, categories, visibility type and much more.

CONTINUED

SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3e • EDIT EXISTING CONTENT

Block settings can be viewed by clicking inside any of your blocks and then clicking the Block settings tab at the top of the sidebar. Some blocks may automatically show the block settings when you click inside the block.

#5 is the block section on the Settings area that displays relevant setting options as you select an individual block. Each block type can have their own distinct setting options available.

#6 are the buttons that allow you to preview and publish your post/page.

As you click on the plus button (#2), a window will be opened where four tabs are displayed as well as a search box. Each tab holds various block types based on their category. The Suggested/Recent tab will show just what it says - any tabs you've recently used. The Blocks tab is where you will find all the available and common blocks that you might require. The blocks in this section are further divided into four categories: common block, formatting, layout and widgets.

The Embeds tab is where you can select the blocks for embedding various audio, videos and other content from various social media platforms and popular websites.

Another easy-to-use feature of Gutenberg is that you can easily rearrange your blocks: when you hover over the block you'll see an up/down arrow on the left-side of the block. Just click it and drag the block to your preferred location.

Each block comes with its own toolbar which appears on top of the block. The buttons in the toolbar would change depending on the block you are editing.

For example, in this screenshot, we are working in a paragraph block which shows basic formatting buttons like: text alignment, bold, italic, insert-link, and strike-through buttons.



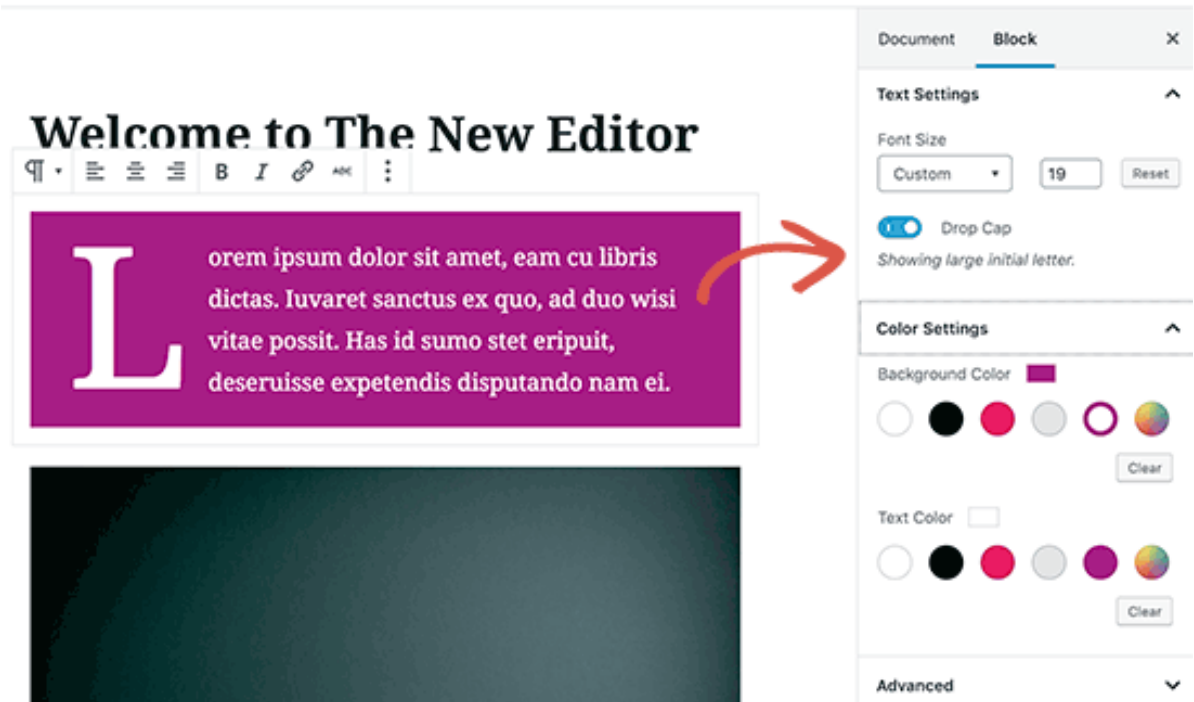
When you click on some blocks, you'll see an inline tool-bar that lets you modify certain block settings such as alignment, image editing, formatting and more. The options shown will depend on the options defined by the block.

CONTINUED

SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3e • EDIT EXISTING CONTENT

Apart from the toolbar, each block can also have its own block settings which would appear in the right column of your edit screen.

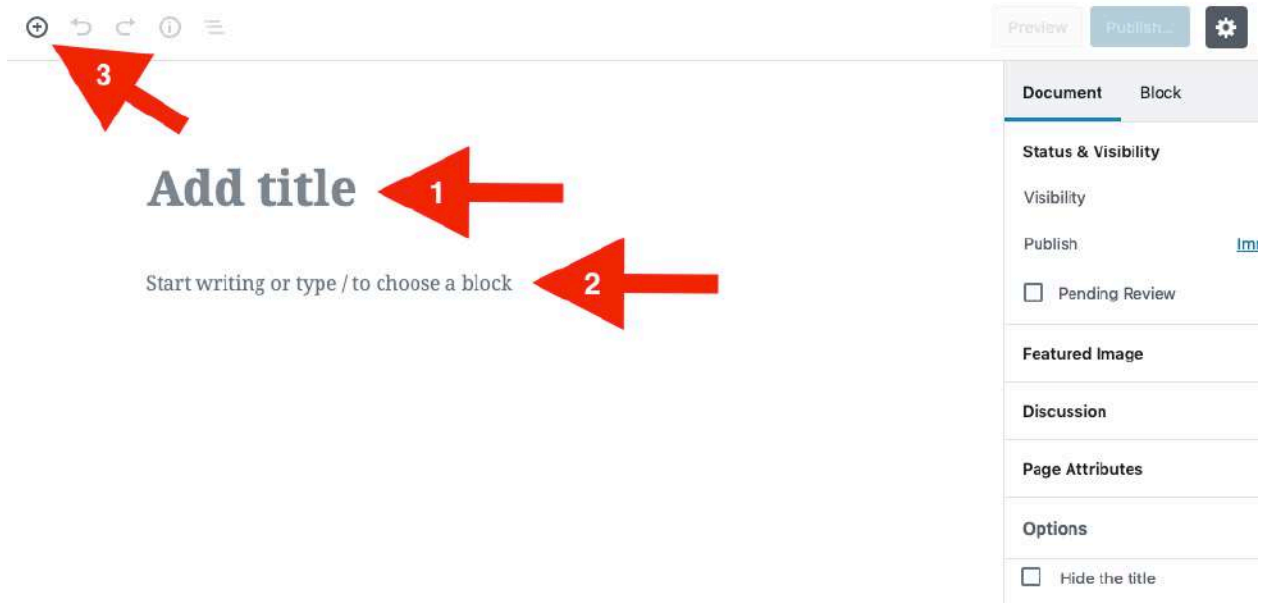


SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3f • ADD NEW WEB PAGES

The first block is the title. After that, you can use the mouse to move below the title or press the tab key on your keyboard to move down and start writing.

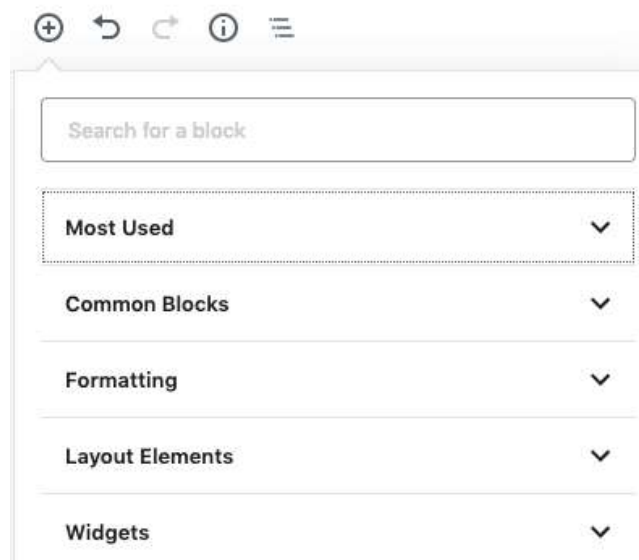
1. Enter the page title. Be sure to keep the title specific to the contents of the page. The title you enter is what will be used to create the name of your new web page, so it needs to be specific and clear as you will be linking to it later in this guide.
2. Type or copy and paste the contents of the web page.
3. Click the '+' when you're ready to add additional blocks to your content area.



4. The Blocks insertion area is where you can find all available options that can be displayed on your page: from basic paragraph text to embedded videos. The Blocks insertion dialog categorizes all the various blocks into their functionality.
5. Each block can have a number of options available for it. Be sure to click on the "block" tab within the editor's sidebar to see what options are there.
6. When you are ready to publish the page, click the blue "Publish" button.

NOTE: We will cover how to add an image or a file to the page in Section 3g.

We will cover how to add the new page you create to the menu in Section 2d-2f.



CONTINUED

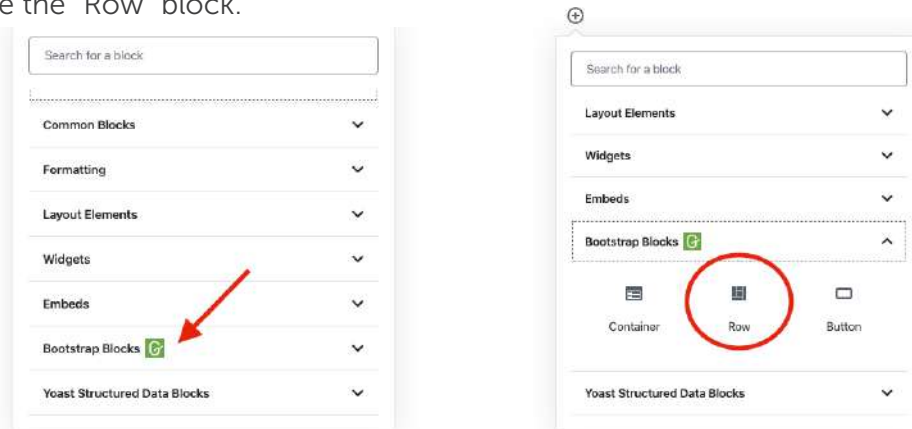
SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3f • ADD NEW WEB PAGES

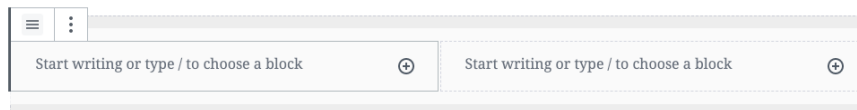
BOOTSTRAP LAYOUT EXAMPLE WITH GUTENBERG EDITOR

To facilitate the basic layout of a two-column Bootstrap layout using the Gutenberg editor and let you visually see the columnar layout within the Admin Editor screen, simply follow these steps:

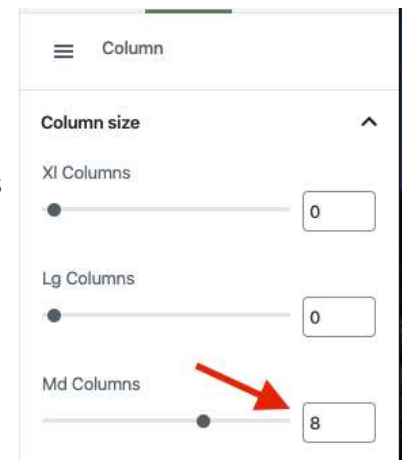
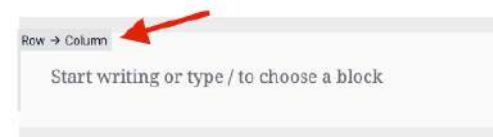
1. Begin a new page as indicated in the information on the previous pages.
2. Click the '+' to show the Gutenberg block list and select "Bootstrap Blocks".
3. Choose the "Row" block.



4. This will place a content box that has two even columns in your content area



5. If you need to change the amount of space that a column takes up, hover the pointer near the top-left corner of the column and then click on the "Row -> Column" text that appears. This will cause the Column Settings menu to appear in the Block Settings area (right-hand sidebar).
6. Expand the "Column Size" settings area.
7. Move the slider for the "Md Columns" to represent the percentage of space you want that column to take up within the row. (There are a total of 12 columns).
8. To be more responsive, you can also adjust the sizing of columns as they would appear under other sized screens (such as mobile phones use the "Sm Columns" setting).
9. Save/update the page.



CONTINUED

SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3f • ADD NEW WEB PAGES

PAGE TITLE AND PERMALINK URL

The Title and URL of a page are related by default. When you initially type the title of your page, the page slug (used in the permalink/URL) is automatically created.

For the Gutenberg Editor, you can modify the page slug by clicking the “Permalink” section in the editor’s right sidebar to display the URL input box. When you’re finished editing, click the “Update” button.

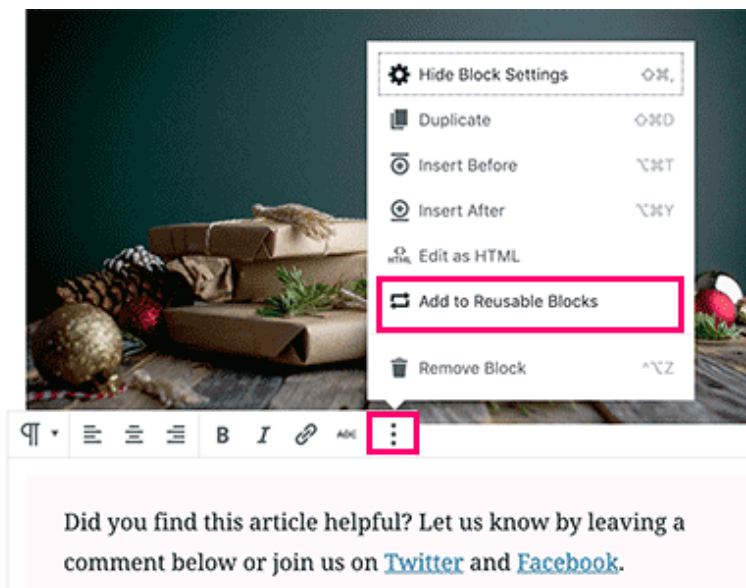
This is especially handy if, for example, your page title is very long, but you would like a URL that people can remember more easily.



SAVING AND REUSING BLOCKS IN GUTENBERG

One of the best things about blocks is that they can be saved and reused individually. This is particularly helpful common pieces of a webpage you want to use in multiple areas.

Click on the menu button located at the right corner of each block’s toolbar. From the menu, select ‘Add to reusable blocks’ option.



You will be asked to provide a name for this reusable block. Enter a name for your block and then click on the save button.

The block editor will now save the block as a reusable block.

Now that you have saved a block, let’s see how to add the reusable block into other WordPress posts and pages on your site.

Edit the post or page where you want to add the reusable block. From the post edit screen, click on the add block button.

You will find your saved block under the ‘Reusable’ tab. You can also find it by typing its name in the search bar.

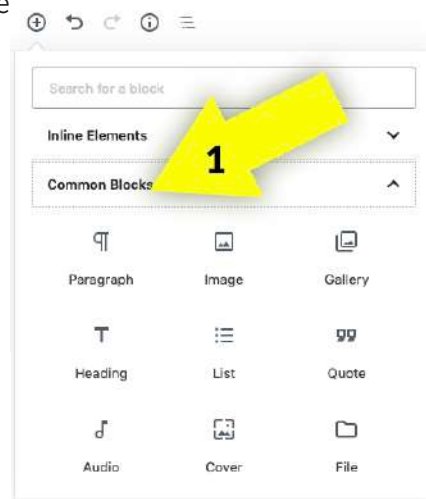
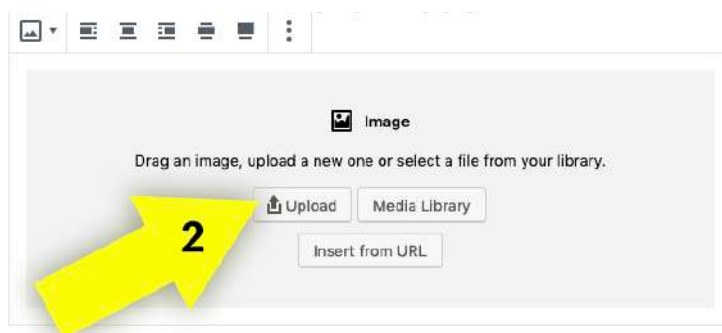
SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3g • ADD DOCUMENTS & IMAGES

UPLOAD IMAGES FROM YOUR COMPUTER

Be sure you are in “edit” mode on the page you wish to add the image to.

1. Place your cursor in the section where you want your image to be placed and a “+” should appear off the left-hand side. Click on it to bring up the block insertion dialog. From there, scroll to “Common Blocks” and then choose “Image”.
2. Next, the Image selection dialog will appear. From there you click the “Upload” button and follow the prompts to add your image.

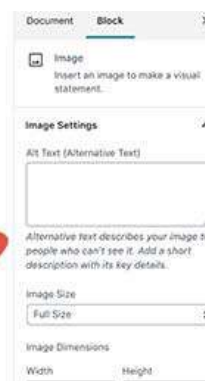


3. The image will be automatically inserted into your page at the position you choose.
4. The sidebar block options should have appeared as well. It's here that you can set the Alt text, fine-tune image dimensions, as well as add a link to the image, if applicable.

You can also drag and drop images from your computer, and the editor will automatically create an image block for it.

To keep your website 508 compliant, it is **VERY IMPORTANT** to add Alt Text to the image.

To add Alt Text to an image, you will type a short description of what the image is showing in the Alt Text field on the right. Entering alternative text for images allows your site to meet certain 508 compliance standards, more specifically, if a user is viewing your website with a screen reader and cannot see the image, the screen reader reads the alternative text attached to the image to let the user know what is on the page.



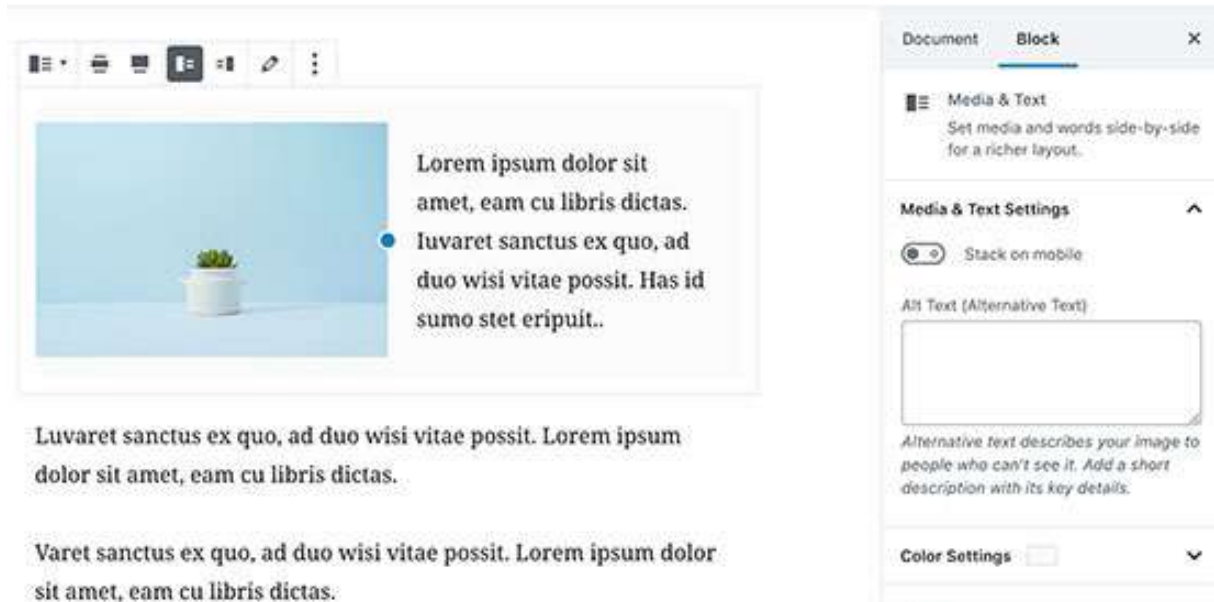
CONTINUED

SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3g • ADD DOCUMENTS & IMAGES

ADDING AN IMAGE NEXT TO SOME TEXT

The Media & Text block comes with two blocks placed side-by-side allowing you to easily add an image and add some text next to it. This block can be found in the “Layout Elements” section.

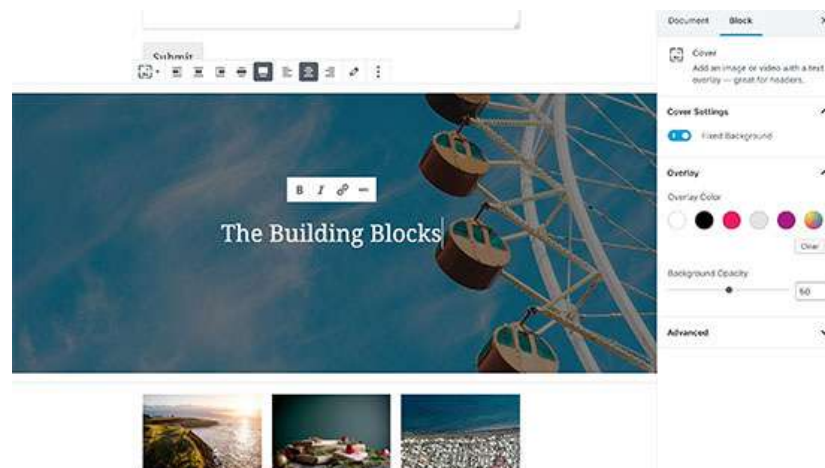


ADDING COVER IMAGES

Another cool feature that you may want to try is the ‘Cover’ block, which allows you to add cover images to your posts and pages. This block can be found in the “Common Blocks” section.

A cover image is a wider image often used as a cover for a new section in a page or the beginning of a story. They look beautiful and allow you to create engaging content layouts.

Add a cover block and then upload the image you want to use. You can choose an overlay color for the cover or make it a fixed background image to create parallax effect when users scroll down the page.



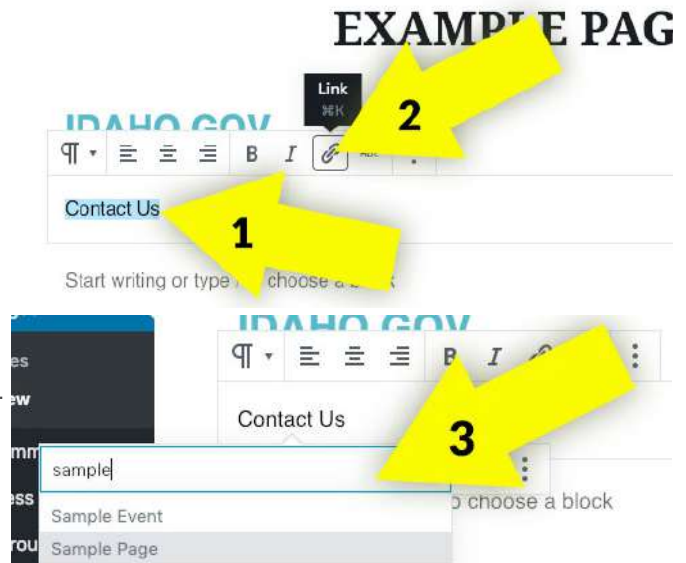
SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3h • ADD INTERNAL & EXTERNAL LINKS

INTERNAL LINK (PAGE ON YOUR SITE)

Be sure you are in "edit" mode on the page you wish to add the link to.

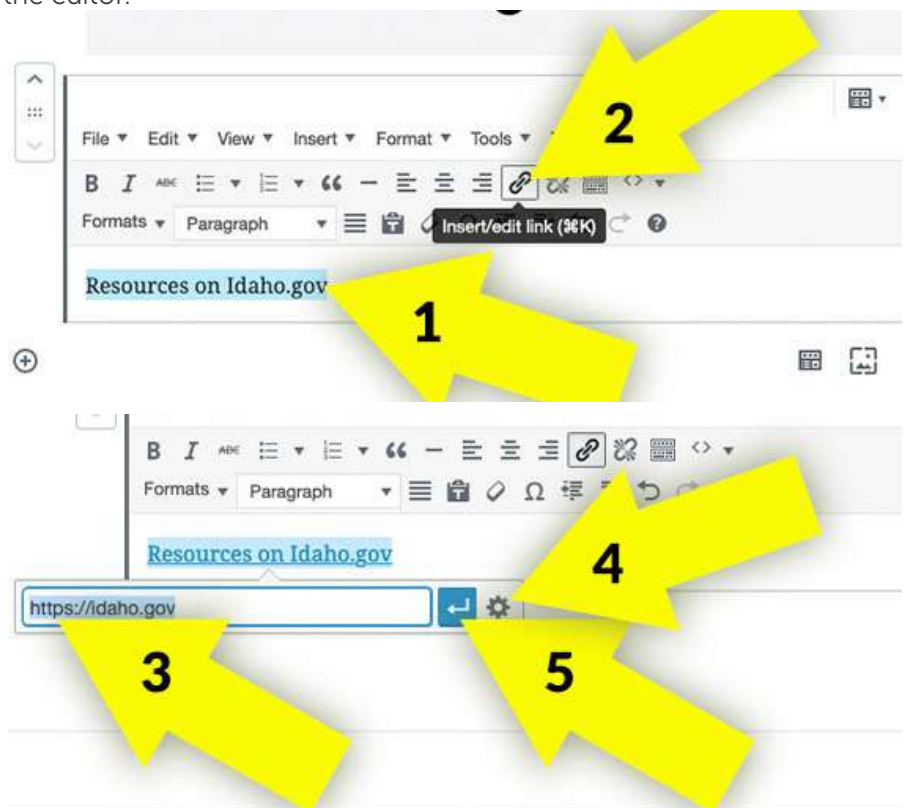
1. Highlight the text or image you wish to add the internal link to.
2. Click the link button in the tool-bar that appears.
3. Start typing the title/name of the page you want to link to and it should be populated in a dropdown. Choose the appropriate page.
4. The link the page will appear in the input field. Finish, by clicking the arrow symbol.



EXTERNAL LINK

Be sure you are in "edit" mode on the page you wish to add the link to.

1. Highlight the text or image you wish to add the external link to.
2. Click the link button in the editor.
3. Type or paste the URL you want to link to in the box that appears.
4. If you would like the link to open in a new tab in the user's browser when they click on it, click the gear icon and in the new box, click the "Open link in a new tab" check box.
5. Click the blue arrow to apply the link.



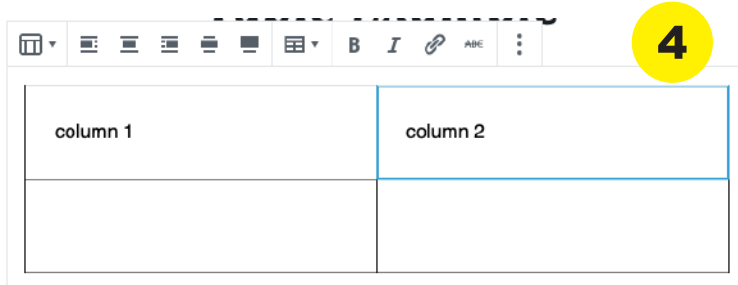
SECTION 3 - EDITING YOUR SITE - GUTENBERG BLOCKS

3i • CREATE A GUTENBERG TABLE

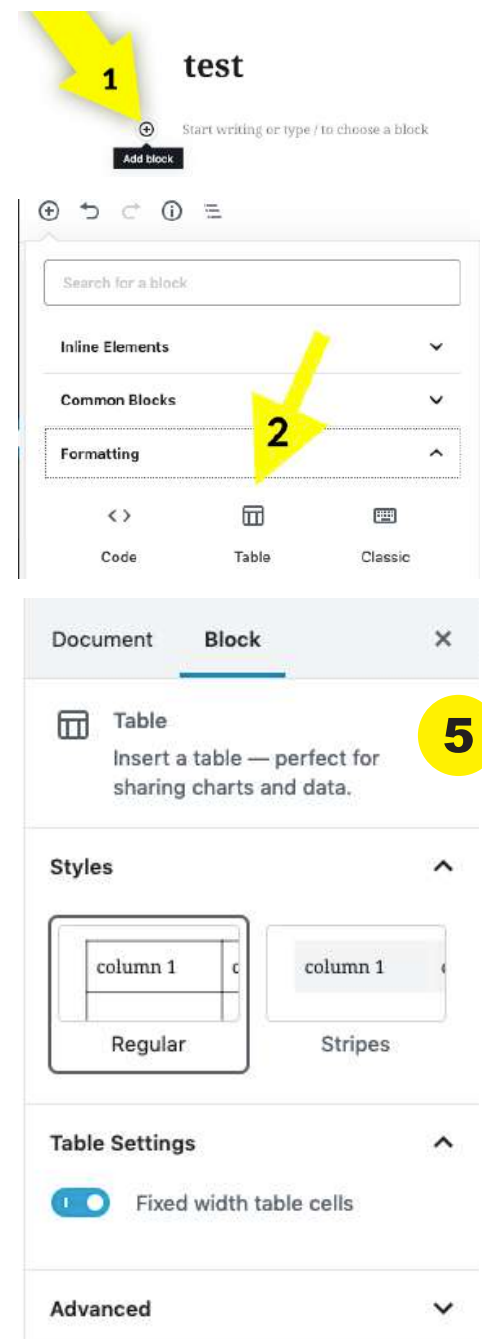
NOTE: Not every website utilizes a table; if you do not have a table or need of them you can skip this section.

Tables allow for formatting of images, data, content, etc. into a tabular format. Although you can use the included “TablePress” aspect to make any sort of table (see the “Create a Data Table” in section 4b), Gutenberg has an easy-to-use built-in method for those who are in need of a more basic table.

1. Begin by editing (or making a new) page where you want to the table to appear. From within the Gutenberg Editor, click on the ‘+’ to bring up the Block Selection window.
2. Choose “Formatting” and then “Table”.
3. The Table configuration dialog will appear, and here you will enter the number of columns and rows that you want your table to have. The click “Create”.
4. A mock-up of the table will appear on screen where you can simply click within each cell to place whatever items you wish within.



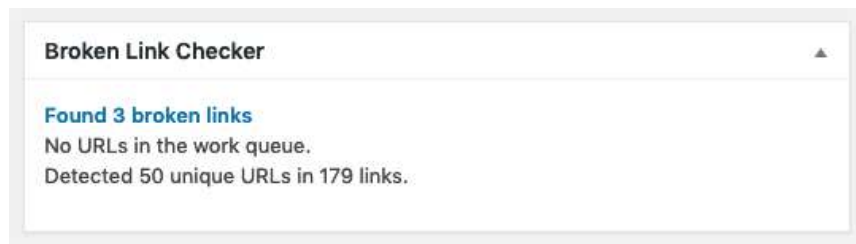
5. This Gutenberg Block also has some specialized, built-in settings you can use (see image to the right). Here you can choose between a regular table or one that has alternating rows striped.
6. Further, by default, the table's cell will expand to fit the content you place within it. If you want all your table cells to be even - i.e., fixed width, then toggle the “Fixed width table cells” setting option.
7. Once your table is completed to your satisfaction, don't forget to click the “Publish” (or, “Update”) button.



SECTION 4 - MANAGING YOUR SITE

4a • MANAGE BROKEN LINKS

On the Dashboard screen, there is a box titled “Broken Link Checker.” Each time you login to your Admin section of your WordPress website, the link checker will check your site for any links that appear broken and report it here.

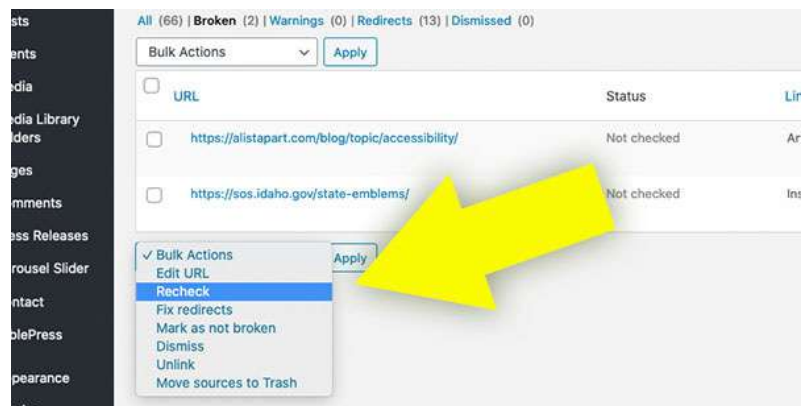


If any broken links are detected then a notification, as shown above, will be shown. To see what links might be broken, click on the blue text link to load a screen that will give these details.

From this screen, you can hover within the area of each reported broken link to get a variety of menu choices from which to choose to correct, dismiss, or trash the reported item, as well as view the page that this offending item is located, etc.



Once changes are made you can have the checker “Recheck” the item(s).



SECTION 4 - MANAGING YOUR SITE

4b • CREATE A DATA TABLE (TABLEPRESS)

WHAT IS A DATA TABLE?

Put simply, a data table is any display of information in tabular form, with rows and/or columns named. The included data table also easily allows for automatic sorting of columns, searching of table data and pagination without any need for additional coding or external scripts.

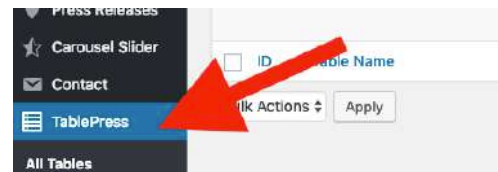
Show 10 entries

Name	Position	Office	Age	Start date	Salary
Airi Satou	Accountant	Tokyo	33	2008/11/28	\$162,700
Angelica Ramos	Chief Executive Officer (CEO)	London	47	2009/10/09	\$1,200,000
Ashton Cox	Junior Technical Author	San Francisco	66	2009/01/12	\$86,000
Bradley Greer	Software Engineer	London	41	2012/10/13	\$132,000
Brenden Wagner	Software Engineer	San Francisco	28	2011/06/07	\$208,850
Brielle Williamson	Integration Specialist	New York	61	2012/12/02	\$372,000
Bruno Nash	Software Engineer	London	38	2011/05/03	\$163,500
Caesar Vance	Pre-Sales Support	New York	21	2011/12/12	\$106,450
Cara Stevens	Sales Assistant	New York	46	2011/12/06	\$145,600
Cedric Kelly	Senior Javascript Developer	Edinburgh	22	2012/03/29	\$433,060

Showing 1 to 10 of 57 entries

NOTE: Not every website has tables filled with data; if you do not have such a table or need of them you can skip this section.

1. Click on the "TablePress" menu option from the menu on the left.
2. The initial screen will show a listing of any data tables that have already been created (and from where you can access them for editing/modifying later).



3. To create a new data table, click on the "Add New" tab to start the process and bring up the form creation/editing screen.
4. Next, you will want to give the table a name and, optionally, a description. Then you want to tell WordPress how many rows and columns are needed to complete your table. Then click the "Add Table" button.
5. Next, the actual table editing screen will load. Once this screen is loaded a lot of different information and setting options are available. The only section you need to be concerned with at this point is the "Table Content" (label A in the image on the following page) section where you simply start typing out the various data for your table.

TablePress All Tables Add New Import Export Plugin Options About

This is a list of your tables. Click the corresponding links within the list to edit, copy, delete, or preview a table.

Shortcode text for editor To insert a table into a page, post, or text widget, copy its Shortcode `[table id=<ID> /]` and You can also click the "Table" button in the editor toolbar to select and insert a table.

Bulk Actions ↓ Apply

<input type="checkbox"/>	ID	Table Name	Description
<input type="checkbox"/>	1	Test Table	(no description)

Add New Table

Table Name:

Enter Table Name here

The name or title of your table.

Description (optional):

Enter Description here

A description of the contents of your table.

Number of Rows: 5

The number of rows in your table.

Number of Columns: 5

The number of columns in your table.

CONTINUED

SECTION 4 - MANAGING YOUR SITE

4b • CREATE A DATA TABLE (TABLEPRESS)

6. Once completed, click the "Save Changes" button.
7. Finally, locate the 'Shortcode' for your table (*label B below*), highlight and copy its text.
8. **If using the Classic Editor:** Navigate to the Page (under "Pages") where you would like your newly-created to appear and edit the page by pasting the copied shortcode from step 7 above into your document.
9. **If using the Gutenberg Editor:** Navigate to the Page (under "Pages") where you would like your newly-created to appear and add a Shortcode Block to the area where you want the table to appear. Paste the copied shortcode from step 7 above into the input field.
10. Click the "Update" button to save.

The screenshot shows the Tablepress interface. The 'Table Information' section includes fields for 'Table ID' (2), 'Table Name' (Example DataTable), and 'Description' (This is just an example). The 'Shortcode' field displays '[table id=2 /]'. A red arrow labeled 'B' points to this field. The 'Table Content' section shows a table with 3 rows and 2 columns. A red arrow labeled 'A' points to the table content area.

RICH TEXT EDITING WITH TABLEPRESS TABLES

By default, Tablepress table fields (*i.e.*, cells) show only plain text/HTML code. If you feel more comfortable with a rich text editing environment - more like Microsoft Word, then you'll want to utilize the Advanced Editor for Tablepress.

To use the Advanced Editor, go to your table's entry/edit screen and then click within the table cell you want to edit. Then, scroll down until you see the boxed section titled "Table Manipulation," which will have a number of choices (buttons) available to you. Click on "Advanced Editor".

The screenshot shows the 'Table Manipulation' section with buttons for 'Insert Link', 'Insert Image', and 'Advanced Editor'. The 'Advanced Editor' button is circled in red. Other buttons include 'Combine', 'Selected rows: Hide', 'Selected rows: Show', 'Selected rows: Duplicate', 'Selected rows: Insert', 'Selected rows: Delete', 'Add 1 row(s)', and 'Add 1'.

A new editing window will open that gives you a familiar interface that easily lets you make items bold, italics, insert links, etc.

The screenshot shows the 'Advanced Editor' window with a rich text editing interface. It includes a toolbar with buttons for 'Add Media', 'a' (link), 'b' (bold), 'i' (italic), 'link', 'del' (delete), 'ins' (insert), 'img' (image), 'code', and 'close tags'. The 'OK' button is highlighted in blue.

Once you've entered all you need to, just click the "OK" button and the Advanced Editor will go away. Then you will need to click the "Save" button to update the table itself.

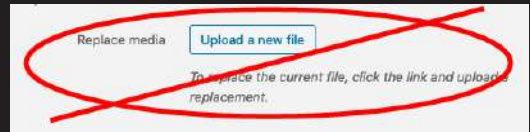
SECTION 4 - MANAGING YOUR SITE

4c • UPDATE A FILE IN TABLEPRESS

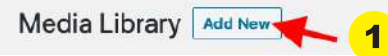
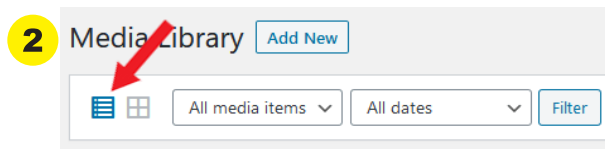
HOW TO SWAP OUT AN IMAGE, PDF, OR OTHER FILE IN TABLEPRESS

DO NOT USE THE "REPLACE MEDIA" OPTION

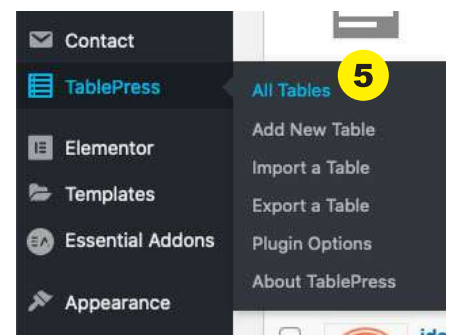
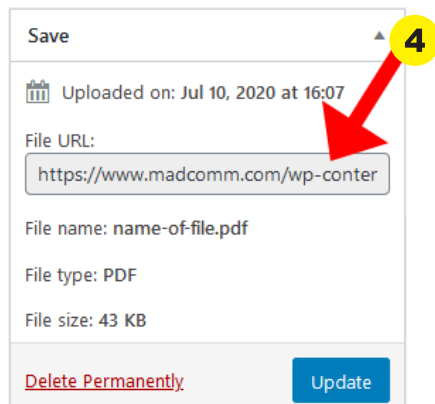
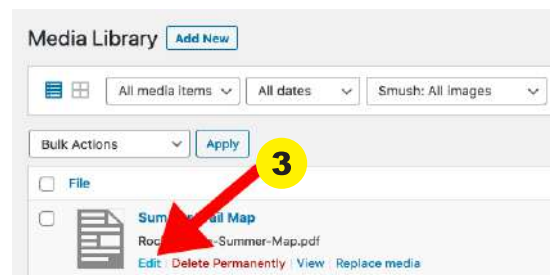
Using this option to update a file that is linked in a tablepress table will cause the table to be corrupt and it will not show the table to users until fixed.



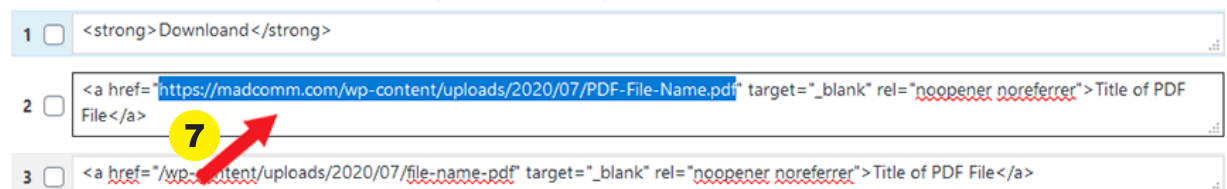
1. Upload your new file via the Media Library.
2. View the Media Library in List mode.



3. After you upload your file click "Edit" (the edit link will appear once you hover over the file).
4. On the right side of the screen, select the entire File URL and copy the entire URL of the file.



5. In the admin menu on the left side of the browser, hover over "TablePress" and click "All Tables".
6. In the list of all tables, scroll down and select the table name that you want to add/updated the new PDF file to. (Depending on the contents of your table, you may see a various number of columns and rows). To expand the table, click and drag the border section to the right so that you can better see the row content.
7. Next, go to the row and cell of the file that you want to replace. Select the file URL as shown below and paste the new file URL you previously copied.

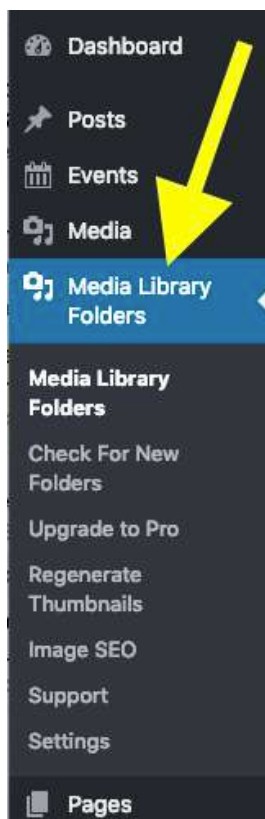


Once the cell is populated with the new file, click the "Save" button and exit TablePress. If you wish to delete the old version of the file, navigate back to the Media Library and find the old file. You can delete the file permanently from here.

SECTION 4 - MANAGING YOUR SITE

4d • USING THE MEDIA ORGANIZER

The standard WordPress media section doesn't allow for much organization capabilities so we've enabled a Media Organizer that will be of particular use to those with a large media library, or who like to keep things as organized as possible.



Within the Media Library Folders section you can create folders, add files, move/copy files between folders, rename files, delete files, sorts by name of file or date of upload and even regenerate the thumbnails.

MEDIA LIBRARY ORGANIZER OPTIONS



ADD FILES / FOLDERS

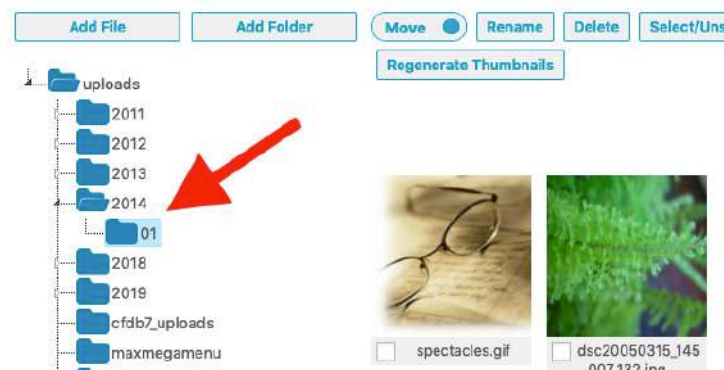
To add a new file or folder simply click the respective button. If you want to create the new file/folder within an already existing folder be sure to navigate to and highlight that particular folder first from the structure tree on the left. Once clicked an upload section will appear. Simply fill out the various inputs and click the button to save.

IMPORTANT: be sure to fill out the "Image ALT" text fields for 508 accessibility compliance.



MOVE / COPY FILES OR FOLDERS

First toggle the move/copy button to the correct selection, then navigate to the particular folder and click it to highlight. This will cause all the images within that folder to appear. Simply check all the images you wish to move/copy and then drag and drop it to the folder in the tree where you want them to be moved/copied to.



The Media Organizer will take care of updating all the links to those images within your site automatically.

SECTION 4 - MANAGING YOUR SITE

4e • USING ICONS ON YOUR WEBSITE

In the previous State template, Bootstrap version 3 was used which had Glyphicons built into it for usage, but with Bootstrap version 4 they are no longer used or supported. With the new State templates, we've built in the Font Awesome service and they should be used instead.

See <https://bit.ly/2JOMFbt> for all the available icons you can potentially use (currently over 1,500 available).

HOW TO ADD AN ICON TO YOUR SITE







Go the Font Awesome icon listing page (<https://bit.ly/2JOMFbt>) and then click the desired icon you would like to use. This will open a new page that gives lots of details about the icon but you just want to click on the icons code to copy it.

Once copied, return to your page's edit screen and select where you want to add the icon and then paste the copied code to that location. Then, save/update your page.



The icons can be easily made different sizes easily by following the instructions on <https://fontawesome.com/how-to-use/on-the-web/styling/sizing-icons>

POPULAR FONT AWESOME ICONS

-  `<i class="fas fa-info-circle"></i>`
-  `<i class="far fa-question-circle"></i>`
-  `<i class="fas fa-exclamation-triangle"></i>`
-  `<i class="fas fa-check"></i>`
-  `<i class="far fa-star"></i>`
-  `<i class="fas fa-user"></i>`

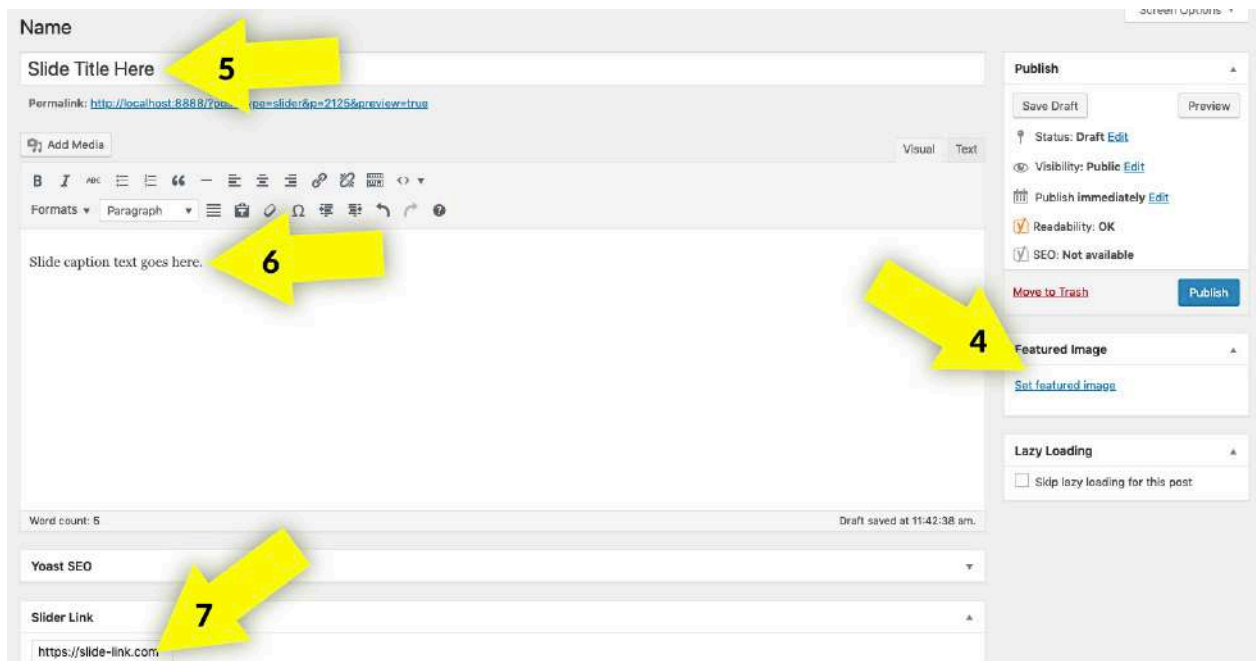
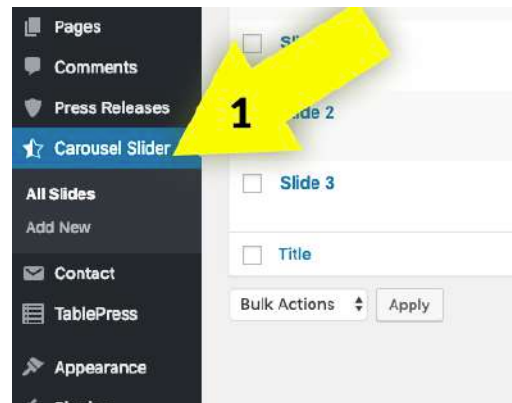
SECTION 4 - MANAGING YOUR SITE

4f • MANAGE CAROUSEL SLIDER IMAGES/TEXT

NOTE: Not every website utilizes a carousel slider section, if you do not have a carousel section on your homepage you can skip this section.

ADD A NEW SLIDE IMAGE

1. Select the "Carousel Slider" option from the menu on the left.
2. This will open the Slider listing screen where you can add a new slider or modify any individual slide, just like a page, post or press release.
3. Click the "Add New" blue button.
4. Choose/upload the image for the slider by clicking on the "Set Featured Image" link within the "Featured Image" box on the right. Then follow the similar procedures to either select a preexisting image or upload a new one.
5. Enter the title for the slide image
6. Enter a slide caption for the slide image, which appear below the title on the slider.
7. **OPTIONAL** - If you would like the slide image to be a clickable link, add the full web address to the "Slider Link" box.



VERY IMPORTANT - add Alt Text to the image(s). To add Alt Text to an image, you will type a short description of what the image is showing in the Alt Text field on the right. Entering alternative text for images allows your site to meet certain 508 compliance standards, more specifically, if a user is viewing your website with a screen reader and cannot see the image, the screen reader reads the alternative text attached to the image to let the user know what is on the page.

CONTINUED

SECTION 4 - MANAGING YOUR SITE

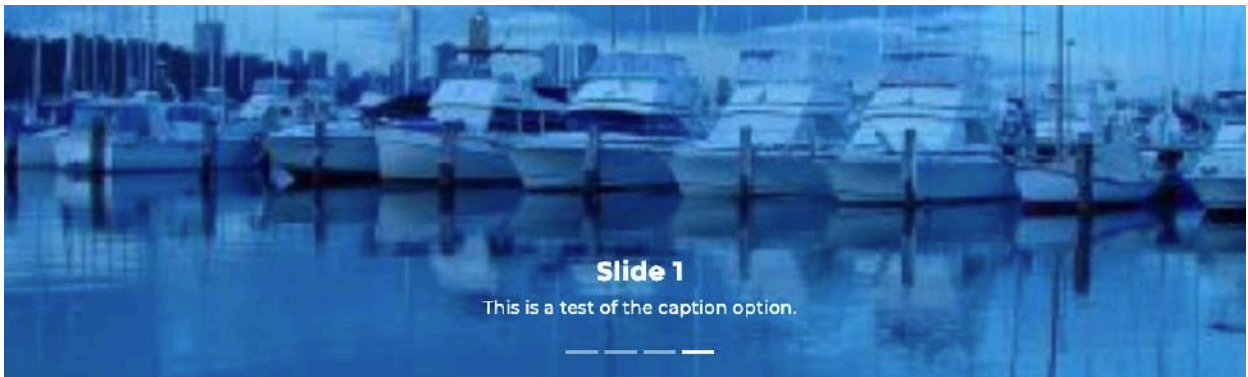
4f • MANAGE CAROUSEL SLIDER IMAGES/TEXT

EDIT A SLIDER IMAGE

1. Select the "Carousel Slider" option from the menu on the left.
2. This will open the Slider listing screen where you can modify any individual slide, just like a page, post or press release by hovering over the requisite slide title and clicking on "Edit".
3. This will bring up the standard editing window where you can make edits as necessary. Once done editing, don't forget to click the blue "Update" button to save your changes.

VISUAL EXAMPLE OF A SLIDER IMAGE

The below image is an example of a carousel slide within the slider that uses both the Title text and the Caption text.



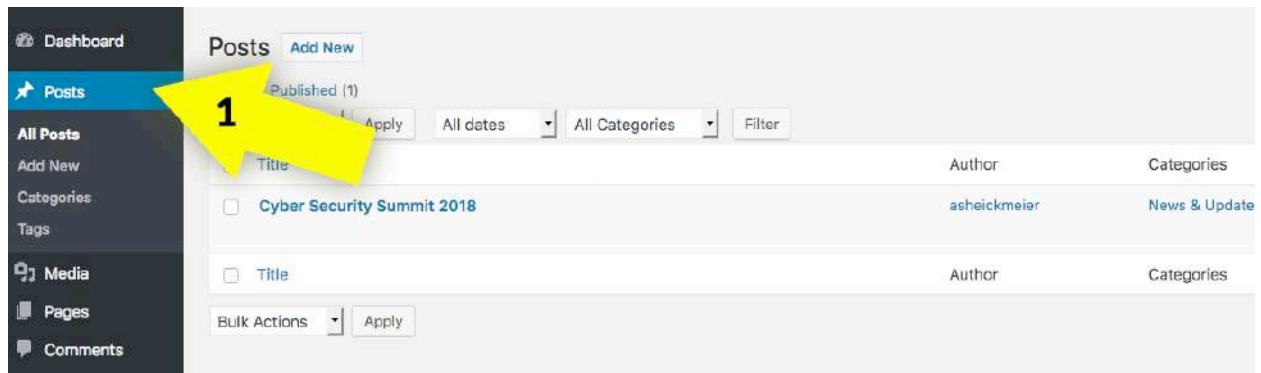
SECTION 5 - BLOG/PRESS RELEASES

5a • EDIT EXISTING BLOG POST/PRESS RELEASE

EDIT EXISTING BLOG POST

NOTE: Not every website utilizes this section, if you do not have a blog you can skip this section.

1. Click on “Posts” in the left side menu.

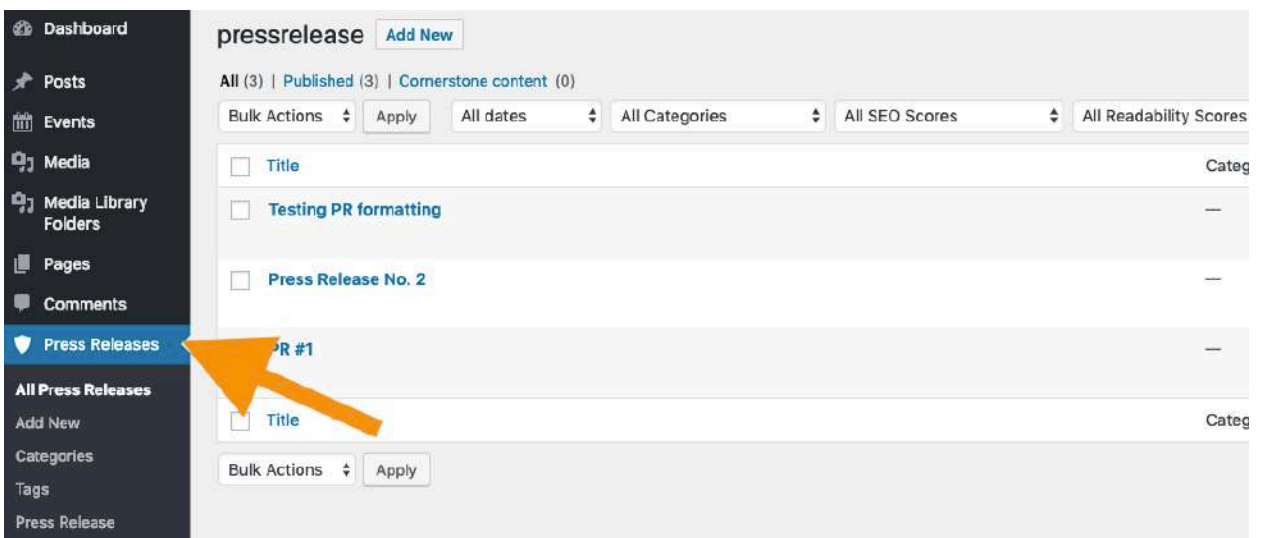


2. On the Posts page, all blog posts will be listed. Find the one you want to edit and click on it. Make any changes you want and save the post.

EDIT EXISTING PRESS RELEASE

NOTE: Not every website utilizes this section, if you do not have a press release area you can skip this section.

1. Click on “Press Releases” in the left side menu.



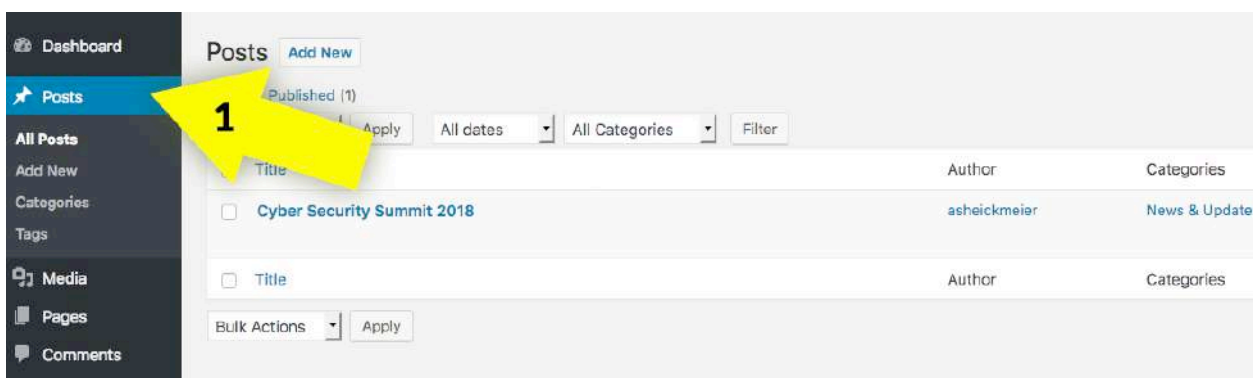
2. On the Press Release page, all press releases will be listed. Find the one you want to edit and click on it. Make any changes you want and save the post.

SECTION 5 - BLOG/PRESS RELEASES

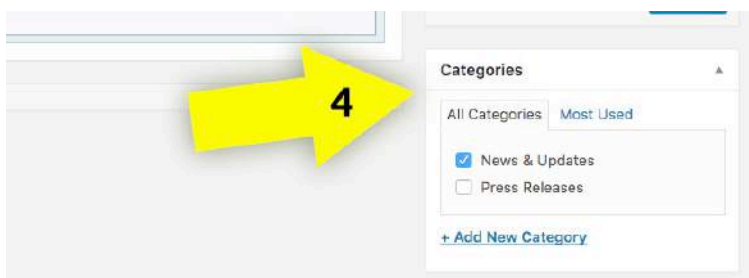
5b • ADD NEW BLOG POST

NOTE: Not every website utilizes this sections, if you do not have a blog section you can skip this section.

1. Click on "Posts" in the left side menu.



2. Click on the "Add New" button.
3. Type, paste, and/or upload the blog content.
4. Select all of the categories that apply in the right column (typically News & Updates).



5. **Optional** - Add tags to help users search for common topics. *Example:* add a tag for the agency division the news relates to.



6. **Optional** - Add a featured image to the blog post.



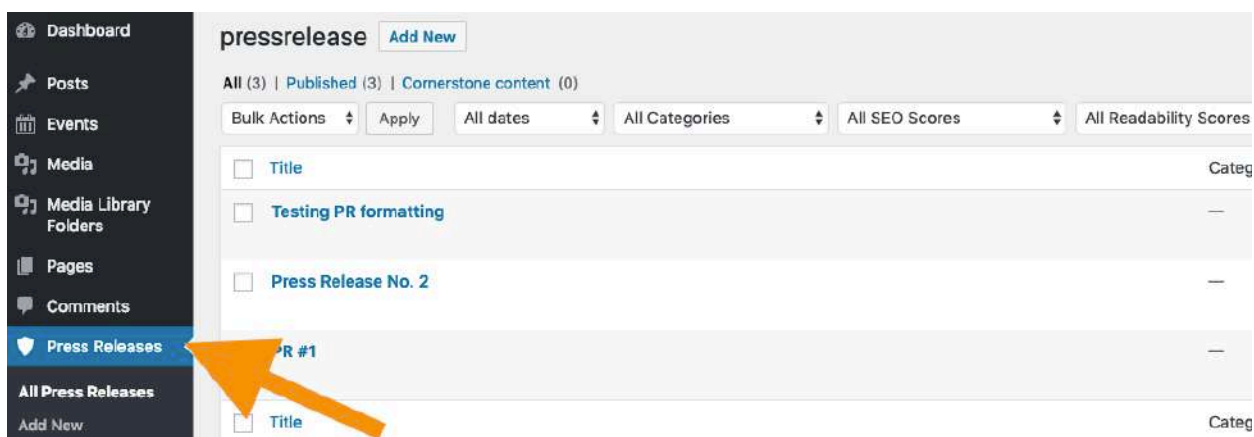
7. Save the page. The new post will now show up on your blog page and feed.

SECTION 5 - BLOG/PRESS RELEASES

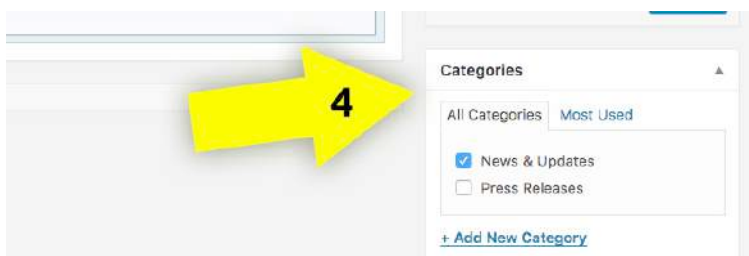
5c • ADD NEW PRESS RELEASE

NOTE: Not every website utilizes this section, if you do not have a press release area you can skip this section.

1. Click on “Press Releases” in the left side menu.



2. Click on the “Add New” button.
3. Type, paste, and/or upload the press release content.
4. **Optional** - Select all of the categories that apply in the right column, if applicable.



5. **Optional** - Add tags to help users search for common topics. *Example:* add a tag for the agency division the release relates to.



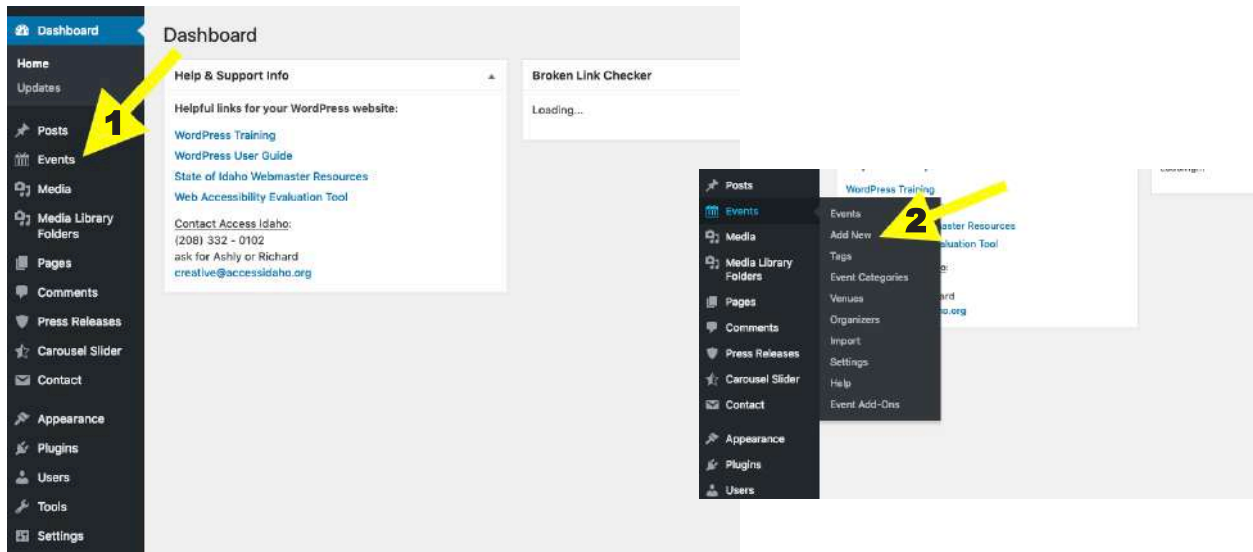
6. Save the page. The new press release will now show up on your Press Releases page and feed.

SECTION 6 - EVENTS

6a • ADD A NEW EVENT

NOTE: Not every website utilizes an event calendar section, if you do not have an event calendar section you can skip this section.

1. Click on the Event menu option.
2. Select "Add New Event" from the slide-out menu.

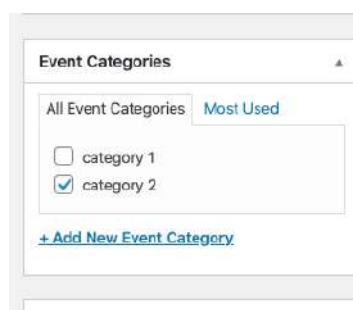


3. Enter the event details such as date, time, location, general information, etc. Documents can be uploaded in the event screen, the processes is the same as stated earlier in this guide.
4. Click the "Publish" button. This will add the information to the calendar.



EVENT CATEGORIES

Each event can be added to one or more category that you assign/create. Further, each category can be assigned a color which will do two things: (1) create a color legend at the top of the month-view calendar -- see above, and (2) allow for listing of upcoming events on other pages based per category.



- Look for the "Event Categories" box on the edit event page;
- Either tick mark a category already listed, or click the "Add New Event Category" link to create a new one;
- Click the "Update" button.

To insert an "Upcoming Events" listing based by category:

- Edit the respective page where you want it placed;
- Add a shortcode block to the specific area where you want it to appear;
- Enter the shortcode of `[tribe_events_list category="xxx"]` (replacing the 'xxx' with the name of the actual category).

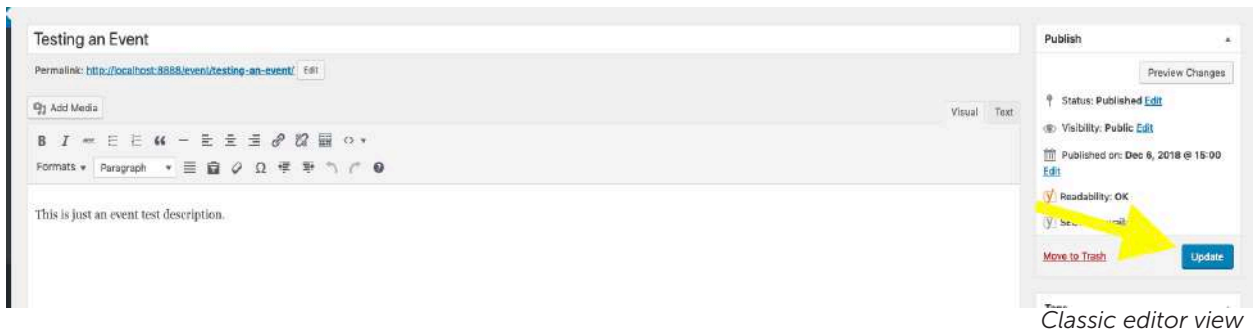
SECTION 6 - EVENTS

6b • EDIT AN EXISTING EVENT

1. Click on Events in the admin menu.
2. Find the Event Listing you want to edit and hover just below it to reveal a sub-menu. Once it appears, click on "Edit".



3. The Event Editor will load where you can edit any information that is necessary. Once satisfied, click the "Update" button in order to save it.



Once completed, the Event will be updated on the calendar.

The (up to) three events coming up the soonest will be showcased on the homepage in an "Upcoming Events" section that appears between the main content and the footer areas. If the widget is activated.



Further, if utilized, there is a sidebar widget option for Upcoming Events that can be used on pages other than the homepage and list **all** events, event if using event categories, and would look similar to the one illustrated to the right:

Upcoming Events



SECTION 6 - EVENTS

6a • SETUP RECURRING EVENTS

RECURRING EVENTS

Have the same event that happens more than once? This is where an Event Series makes things easiest for you. You can enter the event information once and the calendar system will automatically create/update all occurrences in the “series”.

To create a recurring event:

1. On the event edit screen scroll down to the “Event Series” section -- just below the time and date entry -- and click the “Schedule multiple events” button to begin.
2. Choose the button signifying how often this event will repeat: daily, weekly, monthly, yearly, or annually (once).
3. Fill out the information on recurrence specifics.

Start/End: 03/18/2020 12:00am to 11:59pm 03

☐ All Day Event

This event is from 12:00am to 11:59pm on Mar 18, 2020.

Event Series: [Schedule multiple events](#)

LOCATION

Daily Weekly **Monthly** Yearly Once

Every 5

On a different day: the second Monday

At the same time: 12:00am

Series ends on 03/18/2020

An event every 5 months that begins at 12:00AM on the second Monday, repeating until 3 18, 2020

▲ Hide Details

In the example shown above, this event will repeat every 5 months on the second Monday of that month at 12:00.

The “Event Series” gives you fine-tuned control over your recurring events with many different options available.

What if you have an event that repeats each month except during two months in the Summer? Yes, the system can allow you to account for that. For any time-period where you don’t want it to repeat -- when it normally would, then you need to add an event “Exclusion”. This button is the one just below the multiple events button.

You will be presented with the same interface as setting up your recurring event but this time you’re telling the Calendar system when **NOT** to repeat this particular event during the recurring series.

4. Click the Update button to save all this information.

SECTION 7 - FORMS

7a • CREATE A FORM

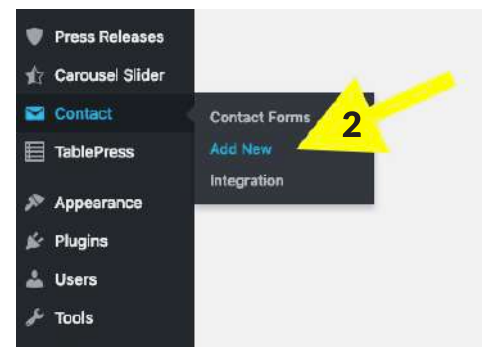
NOTE: Not every website utilizes a form; if you do not have a form or need of them you can skip this section. Also, the information below is specific to the "Contact" admin area. If you're using the "Forms" admin section then you need instructions for "Gravity Forms" which are not included in this user guide.

DO YOU HAVE A FROM THAT NEEDS TO TAKE PAYMENT?

Contact Access Idaho, we can use App Engine, PayPort, or a custom solution depending on the requirements. Creative@accessidaho.org or 208-332-0102.

Forms can be utilized for a variety of online information submissions: from a basic "Contact Us" form to more detailed forms.

1. Hover over the "Contact" menu option from the menu on the left.
2. Click on "Add New" button to start the process and bring up the form creation/editing screen.
3. On the "Add New Contact Form" screen, enter a form title and then start creating your form with the various fields you want it to have. You can utilize all the available buttons that go across the text entry window for the various types of input the form will allow.

A screenshot of the 'Add New Contact Form' screen. At the top, there's a text input field with the placeholder 'Enter title here'. Below this field is a red circle with the number 3. At the bottom of the screen, there are four tabs: 'Form', 'Mail', 'Messages', and 'Additional Settings'. The 'Form' tab is currently selected.

4. Begin by entering the label (for example, "Sender Name") and then click on the applicable button choice for that type of input (for example, "text").
5. This will bring up a settings window. Here, you mark if the input item will be required, etc. Once all settings are set as you need, click the blue "Insert Tag" button and it will add it to the form editing window.
6. After all your form's input fields and other information has been entered your form will be complete.

A screenshot of the 'Form-tag Generator: text' settings window. The window title is 'Form-tag Generator: text'. Below the title is a description: 'Generate a form-tag for a single-line plain text input field. For more details, see [Text Fields](#).' The settings include: 'Field type' with a checked 'Required field' checkbox; 'Name' with the text 'sender-name'; 'Default value' with an empty field; 'Akismet' with two unchecked checkboxes: 'Use this text as the placeholder of the field' and 'This field requires author's name'; 'Id attribute' with an empty field; and 'Class attribute' with an empty field. At the bottom, there is a text input field containing '[text* sender-name]' and a blue 'Insert Tag' button. A red circle with the number 5 is placed over the 'Required field' checkbox.

CONTINUED

SECTION 7 - FORMS

7a • CREATE A FORM

- Click on the "mail" tab in order to configure the various form settings for receiving the submission information.
- Set the email address in "To" who will be receiving all form submission responses. The "From" field will be what shows as the from information when the email is received. Add your Subject line to the email, and then finally configure your Message Body with all the input fields that were filled in by the user and submitted. At the top (see example images at the bottom of the page) you will see a synopsis of all the available fields you configured in step 4 above.



Form **Mail** Messages Additional Settings

Mail

You can edit the mail template here. For details, see [Setting Up Mail](#).
In the following fields, you can use these mail-tags:
[your-name] [your-email] [your-subject] [your-message]

To richard.tuttle@accessidaho.org


From Idaho Webmaster <richard.tuttle@accessidaho.org>

Subject Idaho Webmaster "[your-subject]"

Additional Headers Reply-To: [your-email]

Message Body From: [your-name] <[your-email]>
Subject: [your-subject]
Message Body:
[your-message]
--

Completed Form Example



Form

You can edit the form template here. For details, see [Editing Form Template](#).

text email URL tel number date text area drop-down

Your Name [text* sender-name]

Your Email [email* your-email]

Subject [text your-subject]

Your Message [textarea your-message]

[submit "Send"]

Front-End Example



Your Name

Your Email

Subject

Your Message

Send

- Once all this information has been successfully entered, click the blue "Save" button to complete your form.

CONTINUED

SECTION 7 - FORMS

7a • CREATE A FORM

10. Next, click on "Contact Forms" in the menu on the left to bring up the listing of all forms that have been created.
11. Look for your new form's title and then locate the "shortcode" and highlight it and copy the entire thing.

<input type="checkbox"/> Title	Shortcode
<input type="checkbox"/> Contact form 1	[contact-form-7 id="2061" title="Contact form 1"]
<input type="checkbox"/> Title	Shortcode

12. Insert form short code into a page.
 - **Classic Editor Instructions:** Go to the page (under "Pages" from the menu on the left) where you would like the form to appear. Edit that page and click to the location within the page where you want the form to appear and paste the copied shortcode you did in step 11 above.
 - **Gutenberg Editor Instructions:** Go to the page (under "Pages" from the menu on the left) where you would like the form to appear. Edit that page and click to the location within the page where you want the form to be and then insert a Shortcode Block. Paste the copied shortcode you from step 11 within the input field.
13. Finally, click the "Update" button to save the page with the newly inserted form.

SECTION 8 - SHORTCODES

8a • WORKING WITH SHORTCODES

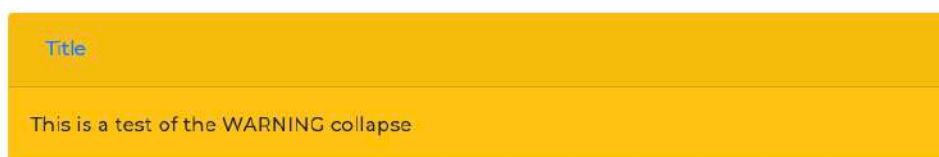
WHAT IS A SHORTCODE?

A shortcode is a WordPress-specific code that lets you do nifty things with very little effort or knowing how to code webpages. Shortcodes can embed files or create objects that would normally require lots of complicated, ugly code in just one line.

COLLAPSE -- a single collapsible box area

Insert the following code and fill out the requisite area(s) with applicable information (*type is optional*):

```
[collapse type="type_here" title="title_of_panel_here"
open="true|false"]The text to appear in the dropdown when link is
clicked goes here.[/collapse]
```



an example Collapse with optional type coloring

TYPES AVAILABLE

primary
secondary
success
danger
warning
info
light
dark

ACCORDION -- multiple collapsible box areas together

Insert the following code and fill out the requisite areas with applicable information (*type is optional*). Just add additional "collapse" sections for each accordion section you need.

```
[accordion]
[collapse type="type_here" title="title_of_panel_here" open="true|false"]The
text to appear in the dropdown when link is clicked goes here.[/collapse]
[collapse type="type_here" title="title_of_panel_here" open="true|false"]
Another text area.[/collapse]
[/accordion]
```



an example Accordion with several type options illustrated

IFRAME -- embeds a website into the page area

Insert the following code (*height is optional*):

```
[iframe url="link_goes_here" height="150"]
```

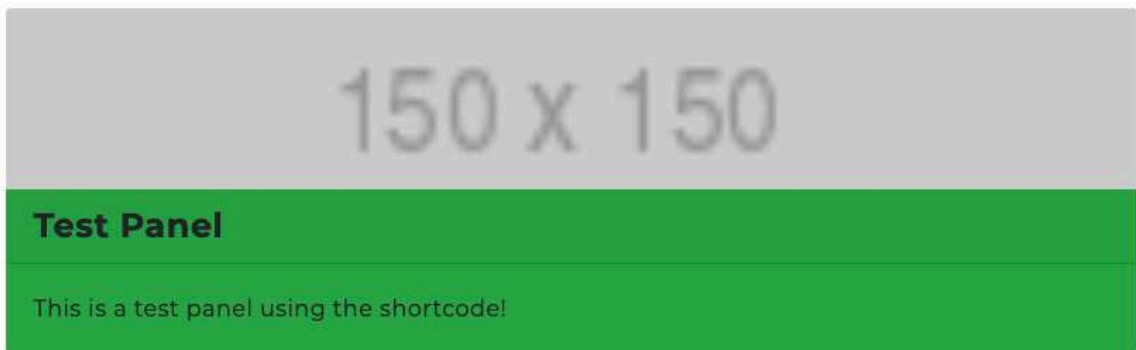
SECTION 8 - SHORTCODES

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CARD PANEL

Insert the following code and fill out the requisite areas with applicable information
(type, top & alt are optional):

```
[panel type="type_here" title="title_of_panel_here" top="link_to_image" alt="text_for_image"]The test to appear.[/panel]
```

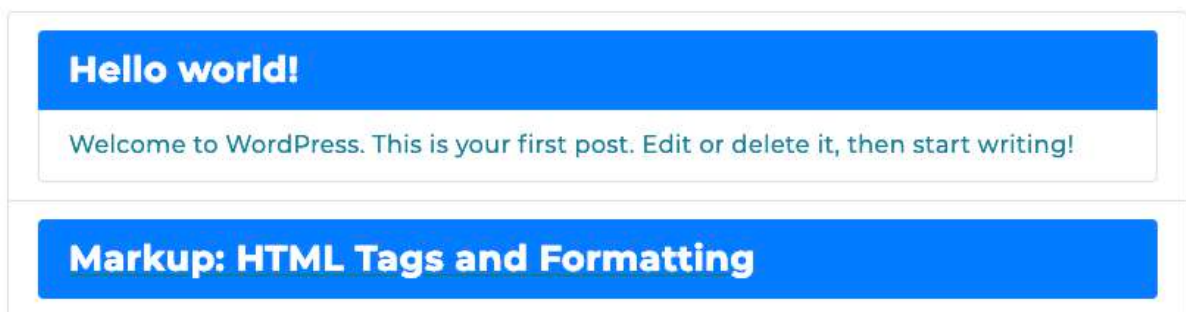


an example Card Panel with optional top image

RECENT-POSTS -- lists the most recent Posts

Insert the following code and replace the "X" with the maximum number of posts you want shown:

```
[recent-posts numberofposts="X" post_status="publish"]
```



VIMEO EMBED

```
[vimeo url="link_to_video_here"]
```



YOUTUBE EMBED

```
[youtube url="link_to_video_here"]
```



SECTION 9 - FOR ADVANCED USERS

9a • BOOTSTRAP 4 OVERVIEW

Bootstrap 4 is based upon a grid design system that allows up to 12 columns across a page (itself built of the Flexbox system). If you don't want to use all 12 columns individually, you're able to group the columns together to create wider columns:

span 1	span 1	span 1	span 1	span 1	span 1	span 1	span 1	span 1	span 1	span 1	span 1
span 4				span 4				span 4			
span 4				span 8							
span 6						span 6					
span 12											

Bootstrap's grid system is responsive and the columns will re-arrange themselves depending on the screen size of the device that the website is being viewed upon.

The Bootstrap 4 grid system has five device sizing options available that allow you to fine-tune your layouts from extra-small (less than 576 pixel width) to extra-large devices (greater than 1200 pixels). The available classes can be combined to create a more dynamic and flexible layout. To read more in-depth about this visit <https://getbootstrap.com/docs/4.0/layout/grid/>

GRID SYSTEM RULES

Some Bootstrap 4 grid system rules to keep in mind:

- Use rows to create horizontal groups of columns
- Content should be placed within columns and only columns may be immediate children of rows
- Predefined classes like `.row` and `.col-sm-4` are available for quickly making grid layouts
- Columns create gutters (gaps between the column content) via padding. That padding is offset in rows for the first and last column via negative margin on `.row`
- Grid columns are created by specifying the number of 12-available columns you wish to span
- Column widths are in percentage, so they are always fluid and sized relative to their parent element

New or unfamiliar with Flexbox?

Read the CSS Tricks Flexbox Guide at <https://css-tricks.com/snippets/css/a-guide-to-flexbox/#flexbox-background> for background, terminology, guidelines and code snippets.