



PREPARED FOR

**Client Name**

PROJECT

**Project Name**

DOCUMENT

**WordPress Documentation**



## 1. WordPress Overview

**WordPress** is the system which allows you to control most aspects of your **web site**. **WordPress Administration** refers to the password protected area which allows you to manage most of the web site's content and settings.

There are three copies of your web site available:

- development
- staging
- production

Environment	View URL	Admin URL
development		
staging		
production		

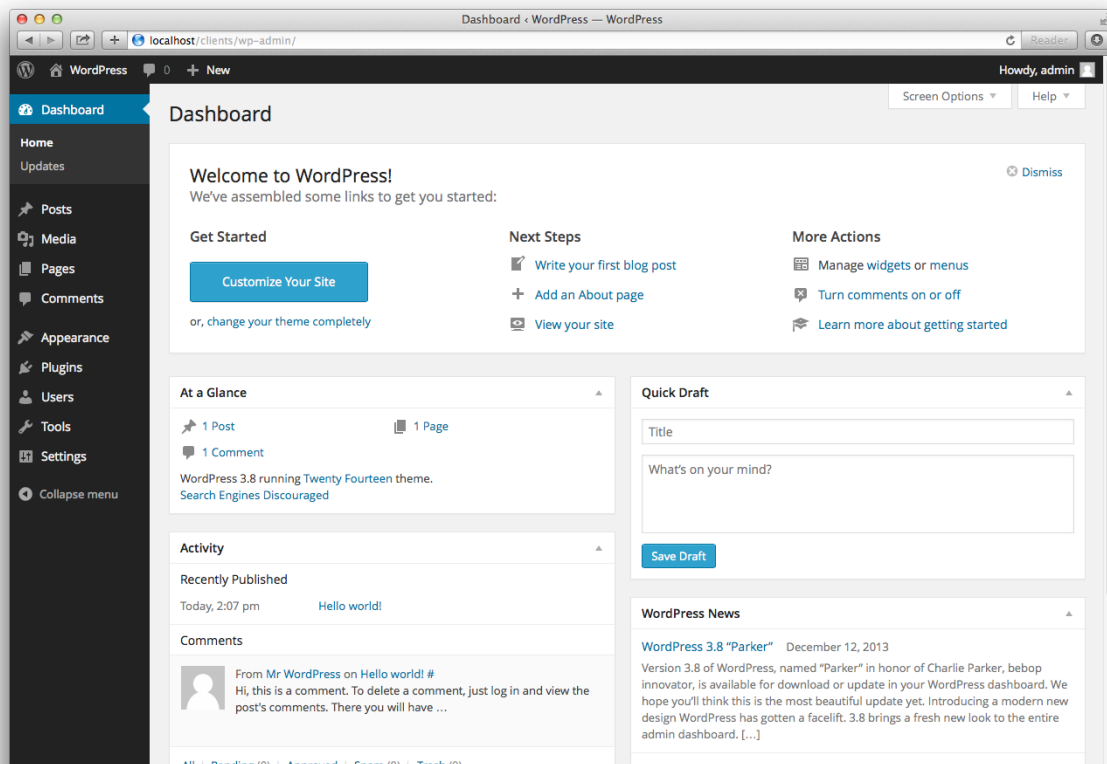
## 2. Terminology

The following WordPress standard terminology is used within this Documentation. For a more detailed glossary, see <http://www.wpbeginner.com/glossary/>

Item	Meaning
Post Type	Different types of content in a WordPress web site
Taxonomy	Used to group / categorize Post Types. Taxonomies include <i>Categories</i> , <i>Tags</i> and <i>Discover Articles</i>
Term	An item within a Taxonomy. For example, <i>Academics</i> might be a <i>Term</i> within the <i>Categories Taxonomy</i>

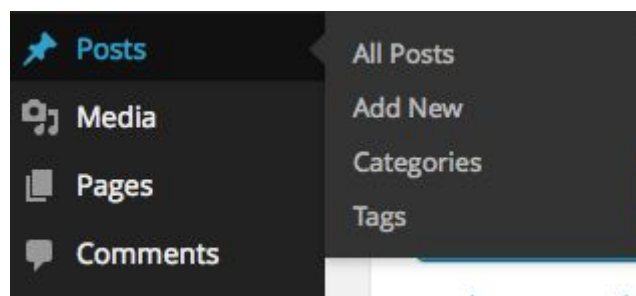
## 3. WordPress Administration

When you login to the WordPress Administration interface, you will see the Dashboard, similar to the below screenshot:



The left hand side of the WordPress Administration interface is referred to as the **Administration Menu**. The Administration Menu contains links to the main functions that you will require in order to update your web site.

Hovering the mouse cursor over one of the Administration Menu entries will display a flyout menu with any further options that might be available:





Clicking the menu entry takes you into that part of the WordPress Administration, as well as showing any additional sub menu options if they are available.

The main Administration Menu entries you will need to use are:

- **Posts** - create, edit and delete Posts, which primarily appear in the **Blog** section of the web site.
  - **Categories** - create, edit and delete high level, generic Categories, to categorise / assign your Posts to.
  - **Tags** - create, edit and delete lower level, specific Tags to categorise / assign your Posts to.

There is additional functionality in the WordPress Administration Interface not covered here, as these functions are not necessarily required for editing the web site.

To visit one of the above Administration Menu entries, click on it.

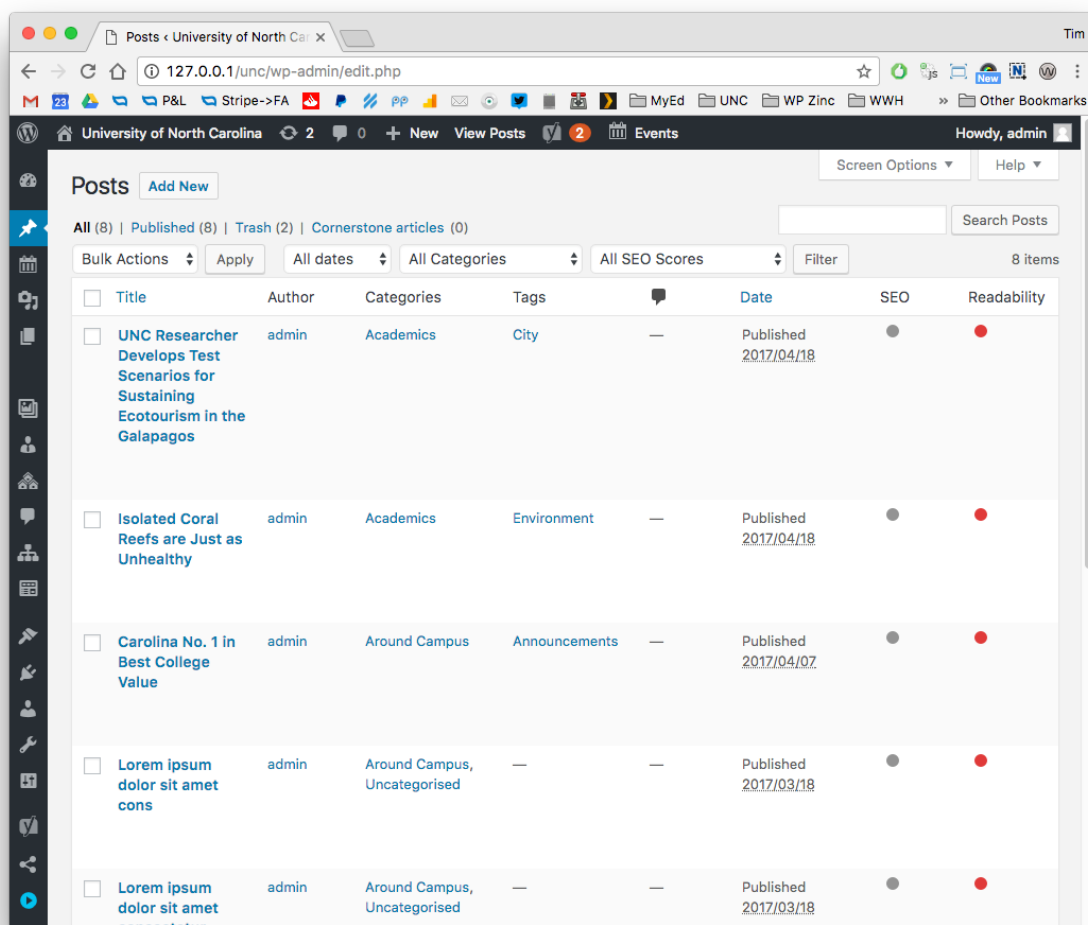
The rest of this Documentation will go through the above Administration Menu entries in order.

## 4. Posts

When you login as a WordPress Administrator, you can access the master list of all Posts by clicking on Posts in the Administration Menu.

Posts are displayed on the Blog section of the web site.

A list of all current Posts will be presented:

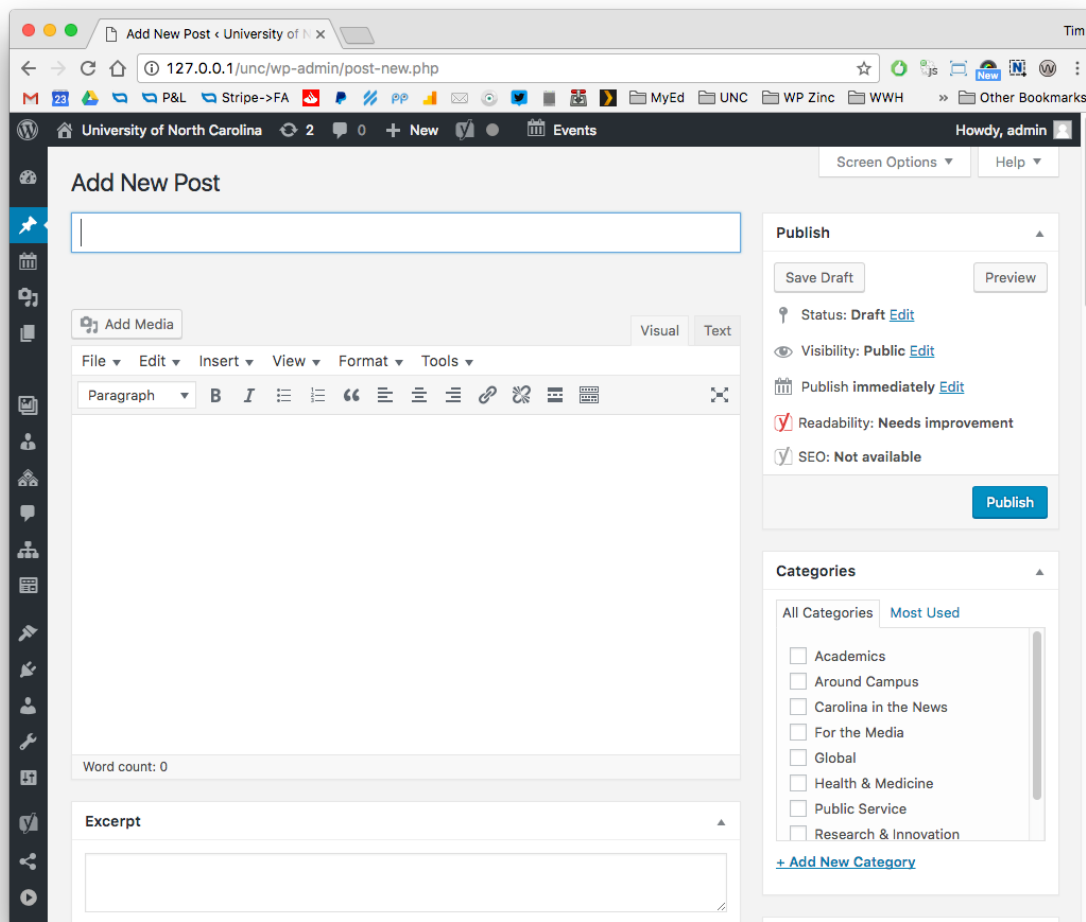


- To Add a new Post, click on the Add New button to the right of the Posts title.
- To Edit an existing Post, click on the Page Title
- To Delete existing Post(s):
  - Click the checkbox to the left of the corresponding Post Title you wish to delete
  - Click on Bulk Actions

- Select Delete
- Click Apply.

## 4.1 Add or Edit a Post

When adding or editing a Post, the following screen will be displayed:



There are several fields and options available; to ensure that all required fields are displayed, you may need to:

- Click on Screen Options
- Enable / tick the following:
  - Yoast SEO
  - Related Content
  - Excerpt
  - Publisher / WordPress User
  - Author

- Categories
- Tags
- Featured Image

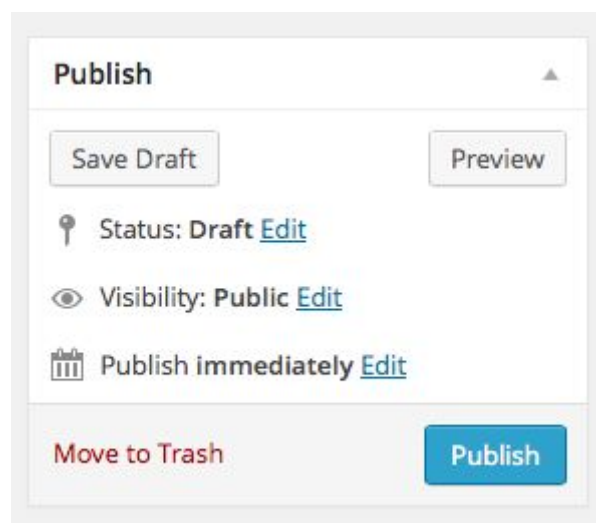
As a minimum, you will need to complete the following fields.

- **Title:** Enter the main title of this Post.
- **Content:** Enter the main Post content.
- **Excerpt:** Enter a short description about this Post. This is displayed when this Post is output in summary format - for example, in a Content Module or Today at Carolina Highlights section.
- **Publisher / WordPress User:** The WordPress User who created this Post. This is not output on the web site.
  - Choosing a User (who does not have an Administrator or Editor role) will allow that User to edit this content. Administrators and Editors can always edit all content on the site.
- **Author:** The authors / content creator(s) to credit the Post to. This is displayed when viewing an individual Post.
- **Categories:**
  - These are the high level, generic News Topics Categories, such as *Academics, Health & Medicine* and *Research & Innovation*
  - Choose the Categories that best describe this Post.
- **Tags:**
  - These are lower level, more specific News Topics Categories, such as *Addiction, Behaviour* or *Diversity*.
  - Enter one or more tags, separated by a comma, that best describe this Post.
  - As you type, if a Tag already exists, it will appear in a dropdown box. Click the tag to use that existing tag.
  - To delete an existing Tag, click the cross symbol to the left of the Tag
- **Related Content:**
  - To define the content which displays in the “You May Also Like” section of the Post, the Related Content section provides options for content curation in each of the three columns:
    - Posts
    - Discover Articles
    - Events
  - Please refer to the Content Curation section of the Documentation for instructions on how to use the available options.
- **Yoast SEO:**
  - Please refer to the Yoast SEO section of the Documentation for instructions on how to use the available options.
- **Media**
  - To define media, which displays at the top of the Post when viewed, use the following options.
  - **Video File**

- Click *Add File* to choose a locally hosted video, or upload a video.
- **Video Captions**
  - Click *Add File* to choose locally hosted captions (.vtt format), or upload video captions. These are important to meet WCAG AA accessibility requirements.
- **Video Cover Image**
  - Click *Add Image* to choose a locally hosted image, or upload an image.
  - This will be displayed as the placeholder / cover, until the visitor clicks Play.
- **Media URL**
  - Enter any third party hosted media URL, such as a YouTube video or SoundCloud Podcast.
  - Any oEmbed provider listed at <https://codex.wordpress.org/Embeds> is supported here. For example:
    - YouTube: <https://www.youtube.com/watch?v=W7CmX8K4I54>
    - SoundCloud
- **Featured Image:**
  - Please refer to the Featured Image section of the Documentation for instructions on how to use the available options.

## 4.2 Saving and Publishing Posts

Once you have finished creating / editing your Post, you'll need to save it. There are different save options available:




- **Save Draft** - this saves the Post, but it will not appear on the web site. You can continue working on it.
- **Preview Changes** - this allows only you to Preview the changes made to the Post on



the web site, without saving those changes and making them available on the web site to all site visitors.

- **Publish immediately** - displayed when creating a new Post.
  - Clicking Edit allows you to define the Post's date and time.
  - If set to a future date and time, the Post will be Scheduled. It will automatically become visible (Published) on the web site from the given date and time.
- **Publish / Schedule Button** - this publishes or schedules the Post for publication, making it visible on the web site, based on the above date and time setting. Once a Post is Published, this button will be labelled *Update*
- **Visibility:** By default, this will be Public. To make the Post Sticky (appear first in any Automatic Content Modules that display Posts):
  - Click *Edit*

 Visibility: **Public** [Edit](#)

- Tick the *Sticky Post* option

 Visibility: **Public**  
 Public  
 Sticky Post  
 Password protected  
 Private

[Cancel](#)

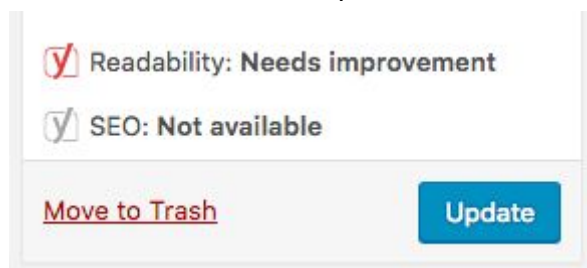
- Click *OK*

 Visibility: **Public, Sticky** [Edit](#)

## 4.3 Delete a Post

To delete a Post that you are editing:

- Click the Move to Trash option

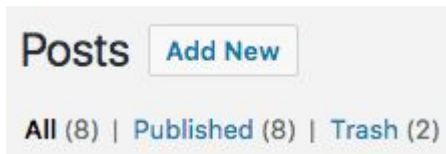


## 4.4 Restore a Deleted Post



To restore a previously deleted Post:

- Click on Posts in the WordPress Administration Menu
- Click on Trash just below the Posts Title



- Below the Post Title, click Restore

