# Websites

## Administrator User Manual

# Phewl!
WEBSITES

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Revision ver 4-Feb 2022

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# Introduction

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

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

# Conventions used in this document

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

⚠️ Warning

✔️ Best Practice

👍 Useful tips

➡️ Navigate to

# Objectives

This manual will take you through:

> How to log on.

> How to navigate around the site.

> How to add, update and delete pages, blog, news posts and images.

> How to add, update and delete news posts.

> How to add, update and delete pages images.

> How to manage users.

> How to amend broken links.

# Contact us

Please contact us at [support@phew.org.uk](mailto:support@phew.org.uk) if you have any questions or require and further clarification.

# Logging In

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

If you have not received this e-mail, please contact [support@phew.org.uk](mailto:support@phew.org.uk)
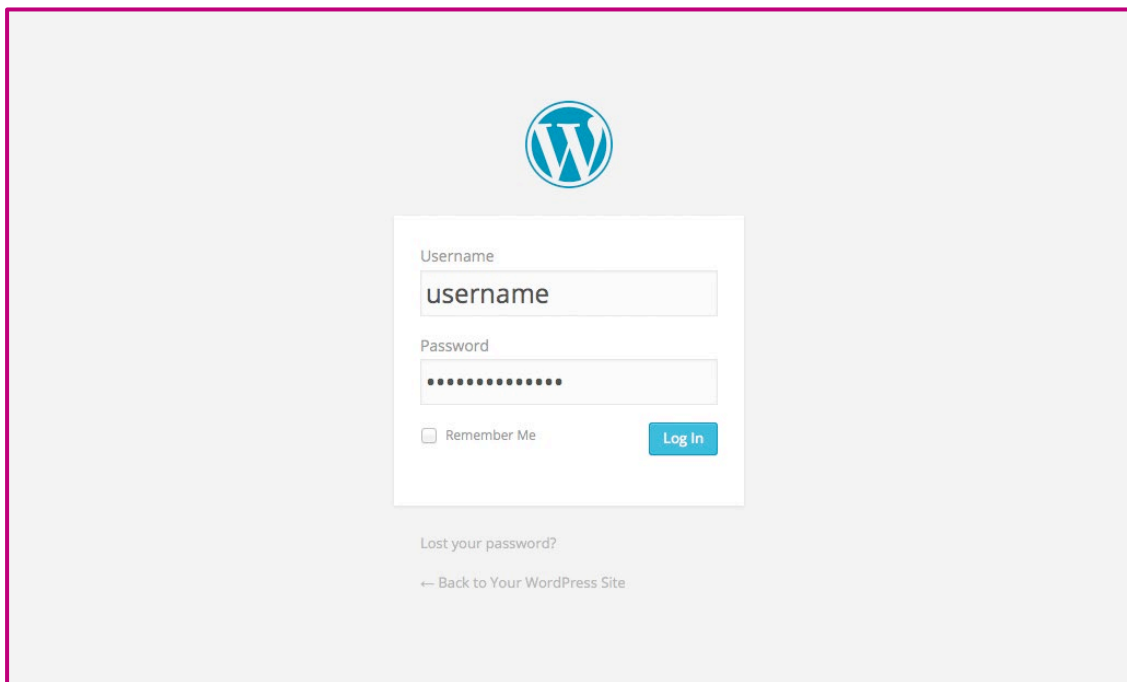
# Common features
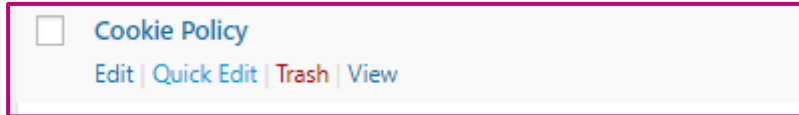


The following are common on Posts/news, Pages, Partners, Documents, Resources, Testimonials, and comments.

- **Edit:** will allow you to edit your X.
- **Quick Edit:** allows you to edit basic X information.
  - ✓ Do not use this feature as it can distort what you can see.
- **Trash:** will send the X to the Trash.
- **View:** displays the Page as it appears live to your website viewers. If the Page has not been published yet, this will say Preview.
- Clicking the ▼▲ will expand each section.

# Top Menu icons



      This is all about WordPress.

      This is your home button and will take you to visit your site i.e. your web page.

      Update Theme this is the theme of your site, if you see a number against it this is about updates.

      These will show number of comments and will take you to the comments.

      This is your new button you can create a new element when selecting any of the options from the fly-out menu

Notifications
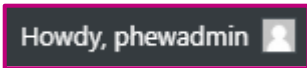


The tool bar will show on the left-hand side the name of the current user.
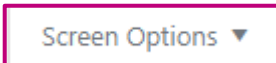


Select this link and the panel will slide down the page and offer you options to set which panels you would like to be displayed on the page.
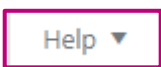


Select this link for an overview of the page you are working on and available actions. You will be also offered Docs, FAQ and Support.

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

## Side Menu icons



Fly out menu
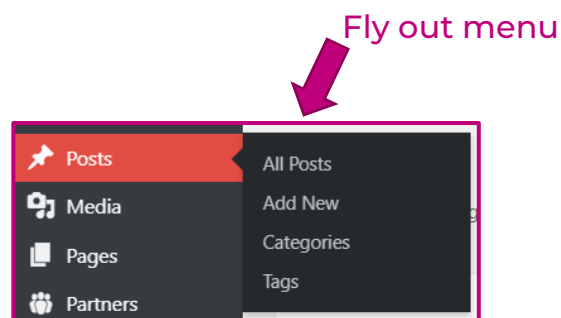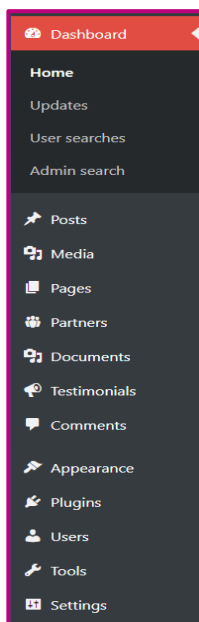


Down the left-hand side of the Dashboard and on every page, you will see your main navigation menu. This is where you will find all the options to update and configure your site. Hovering your cursor over each of the main menu options will display a fly-out menu with the various choices for that menu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

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

👍 These can differ site to site.

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

# Updates

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

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

# Dashboard

| Dashboard | | | Screen Options ▼ | Help ▼ |
|---|---|---|---|---|

| At a Glance | ▲ | Quick Draft | ▼ | |
|---|---|---|---|---|
| 📌 2 Posts    📄 11 Pages | | WordPress Events and News | ▼ | |
| 💬 5 Comments | | | | |
| WordPress 5.2.2 running Template 2 theme. | | | | Drag boxes here |
| Activity | ▼ | | | |
| Yoast SEO Posts Overview | ▼ | | | |
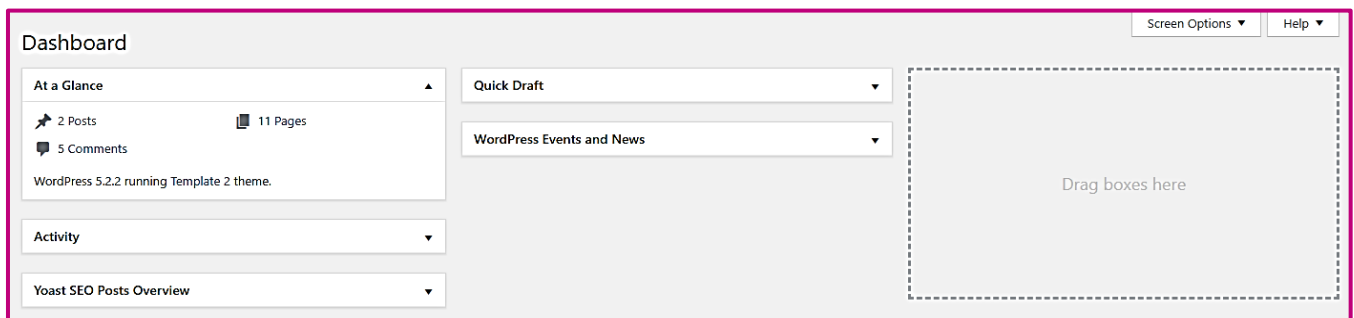
Once you have logged in, the WordPress Dashboard appears. This is your main administration homepage.

🏠

# Dashboard Navigation

- **Posts:** this is where you can create a new blog or news post. You can also update your Categories and Post Tags.

- **Media:** this is where all your uploaded images, documents or files are stored. You can browse through your media library, as well as edit and update the files.

- **Pages:** this is where you create and maintain all your website's pages.
  **Partners:** this is where you create and maintain all the organisations that you are closely involved with. This is optional and might not be set up on your site.

- **Documents:** presents your documents in an easy to find format and keep your document library organised this feature and you are not required to login to access the documents. This is optional and might not be set up on your site.

- **Resources:** this feature works in the same way as documents the difference is that you are required to login to access the documents. This is optional and might not be set up on your site.

- **Popups:** this feature lets you add a pop-up box to all or certain pages of your site.

- **Revisions:** this is where you will manage any revisions made to a page, or a document and posts before being published to the site.

- **Testimonials:** this feature lets you collect kudos from customers and clients and display them on your site to add credibility and a professional feel.
  This is optional and might not be set up on your site.

- **Comments:** you can manage all your comments within this section, including replying to comments or marking them as spam.

- **Phew forms:** this is a contact form.

- **Appearance:** this menu is where you control how your site looks. You can choose a new theme, manage your site widgets or menus, and even edit your site theme files.

  ⚠️ Do not make any changes unless you are adding pages to your menus.

- **Plugins:** Plugins extend and expand the functionality of WordPress. You can add or delete plugins within here as well as activate or deactivate them.

⚠️ **Phew** will manage this section.

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

- **Tools:** this section gives you access to various convenient tools. You can also import data to your WordPress site or export all your WordPress data to a file.

- **Settings:** this is where most of your site is configured. It allows you to configure your site name and URL, where your posts appear, whether people can leave post comments or not and numerous other settings. Most times, once your site is setup, there is no need to change any of the settings within this section.

- **Collapse menu:** this feature allows you to reduce your menu to icons only sizes to give you more room on your screen and work area.

## Broken Link Checker
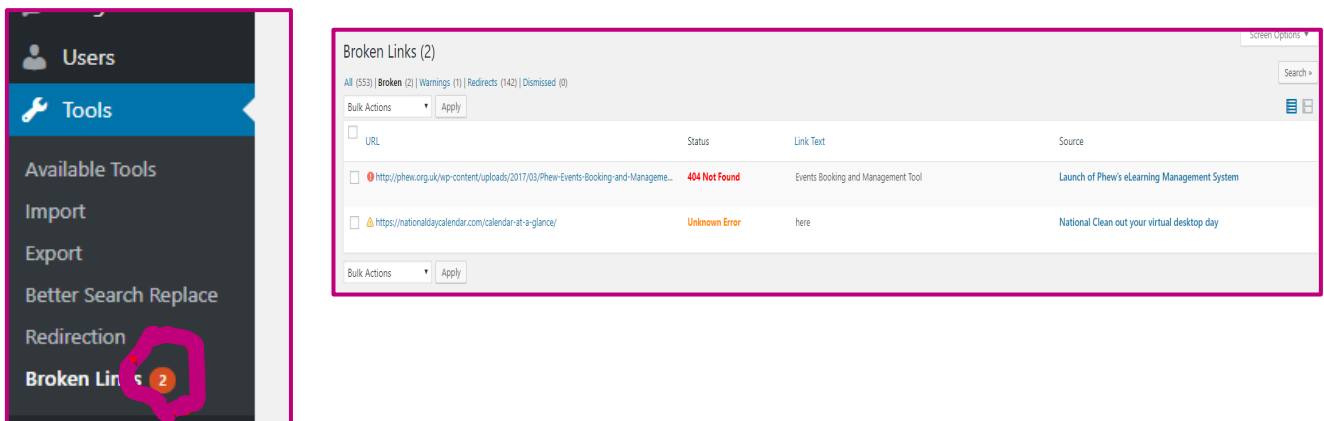


If made available to your site, we install a plugin titled Broken Link Checker.

You can find this on the left-hand side tab of your WordPress website. We will be able to notify you if any of these links are broken. We would recommend that whenever you use your website you check this Broken Links on the left-hand side which will display a number if there are links to look at.

As you can see, we currently have two broken links to look at.

These links are displayed above and there are a few ways you can amend these links. If you were to hover over one you would get the following options.
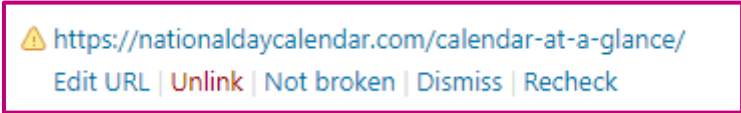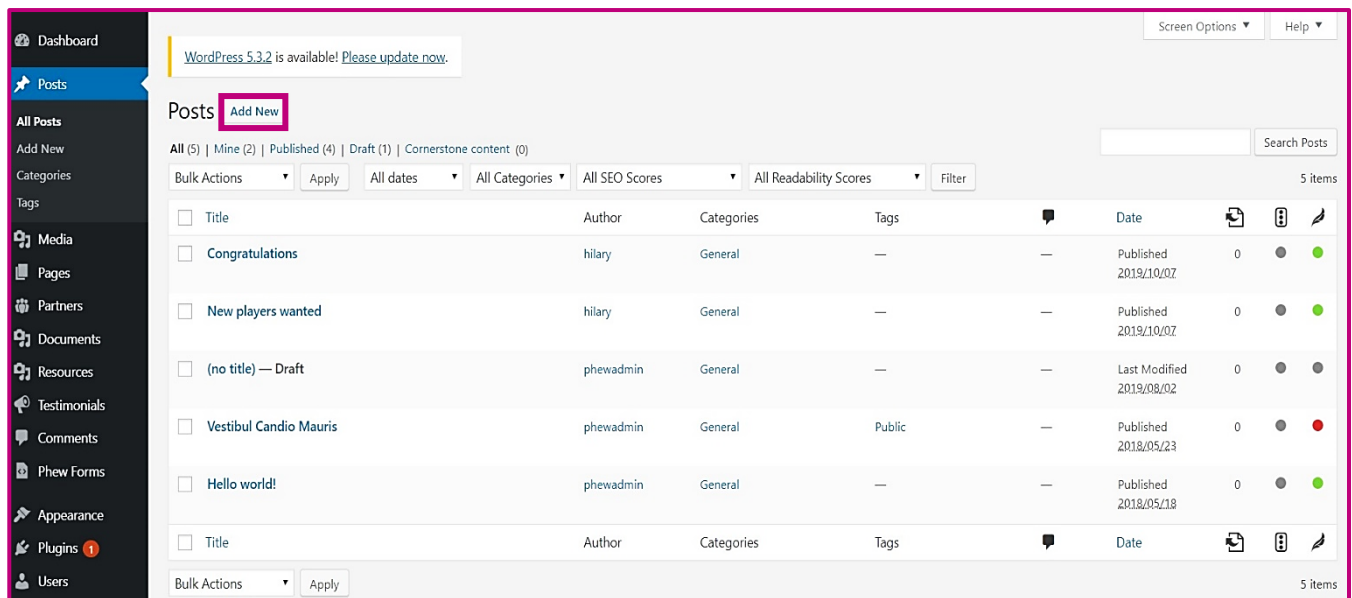


- **Edit URL:** if you find there to be a mistake with the website or URL you can use this to amend it.
- **Unlink**: sometimes websites are completely closed or removed so you are no longer able to find a new version. This is when it is most likely going to be the case to just completely remove the link.
- **Not broken** once you can have that the link is fine you can use this, and it will recheck it again and ensure that it is not broken.
- **Dismiss**: it is possible to completely dismiss the broken link.
  - ✓ we would not recommend doing this and trying to repair the issue elsewhere.
- **Recheck:** It is quite often the case that the website in question may have been down for maintenance at the time of the Broken link check. It is always worth double checking to see if it is not actually broken or was just being slow. If the recheck is fine and there are no further issues, then it will flash green, but it may be worth just opening the link up in a new tab as well.

# Posts or News

## How to add a post or news



On your site these will be the short articles that you will be located under News on your main site page and under News from your top heading.

👍 News articles can also be called Blog Posts.

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

### To add a Post:

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

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

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

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

- In Comments this feature Is usually switched off. Is where logged in users can comment and see other comments.

- The Analytics Tracking allows you to track the news add in the tag you wish to track.

👍 You will need to contact support to add this to your Google analytics dashboard.

- If you would an image next to your post add into the Featured image section on the right-hand side exactly as you would add an image.

- The publish section is when you are ready to publish your page. You have several options that you can choose:

    - You can preview the post.
    - You can publish the post immediately.
    - Save the post as a draft.
    - You can schedule when the post can be published.

A useful feature when creating a news article is that you can either publish the article immediately or you can schedule a post. Simply click on Edit to select a publish date.

- The Categories section allows you to categorise your Posts/Articles.

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

## Analytics Tracking

This is usually set up at before you go live on the site so that your Google analytics dashboard is created if you need to add a different tag you will need to email support@phew.co.uk to set this up for you.

# Categories



- **Name:** the name is how it appears on your site.
- **Slug:** the "slug" is the URL friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.
- **Parent Category:** categories, unlike tags, can have a hierarchy.
- **Description:** the description is not used on this site.

# Media
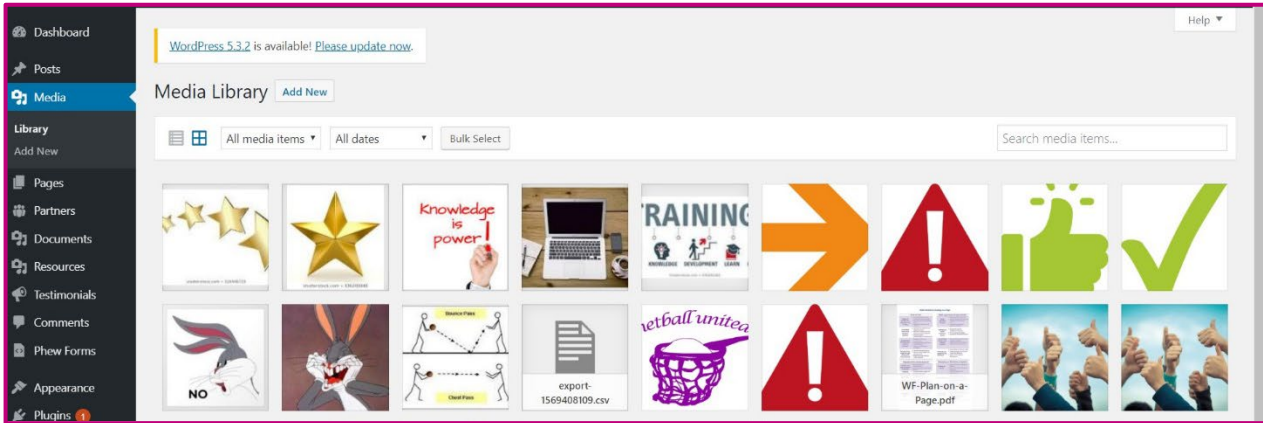


This is where all your images and files for your site are stored in the Media Library, e.g. this will be photos, Word documents and PDF files. You can add or delete files at any time.

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

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

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

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

✓ It is good practice to remove any documents and or images that you no longer use.

👍 Removing images: to remove an image hover your cursor over it and click the small X.

👍 Rearrange images: click and drag each image to reorder them.

✓ If you have the document library best practice to upload documents there.

# How to search for existing media
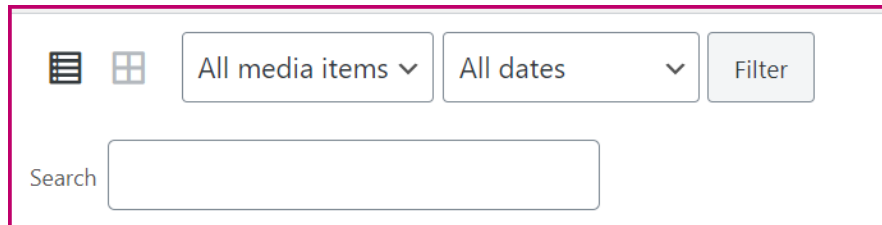


You can organise your media library either in a List or by Tiles.

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

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

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

# Adding an image or other files to your page
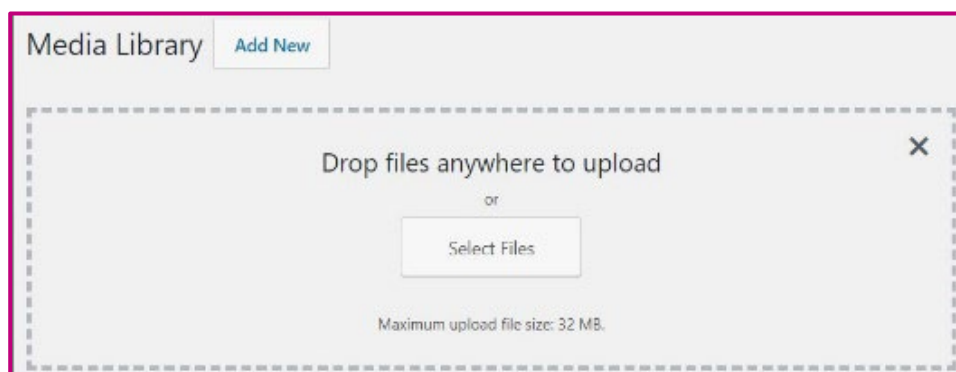


To insert an image or document into your Page or Post,

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

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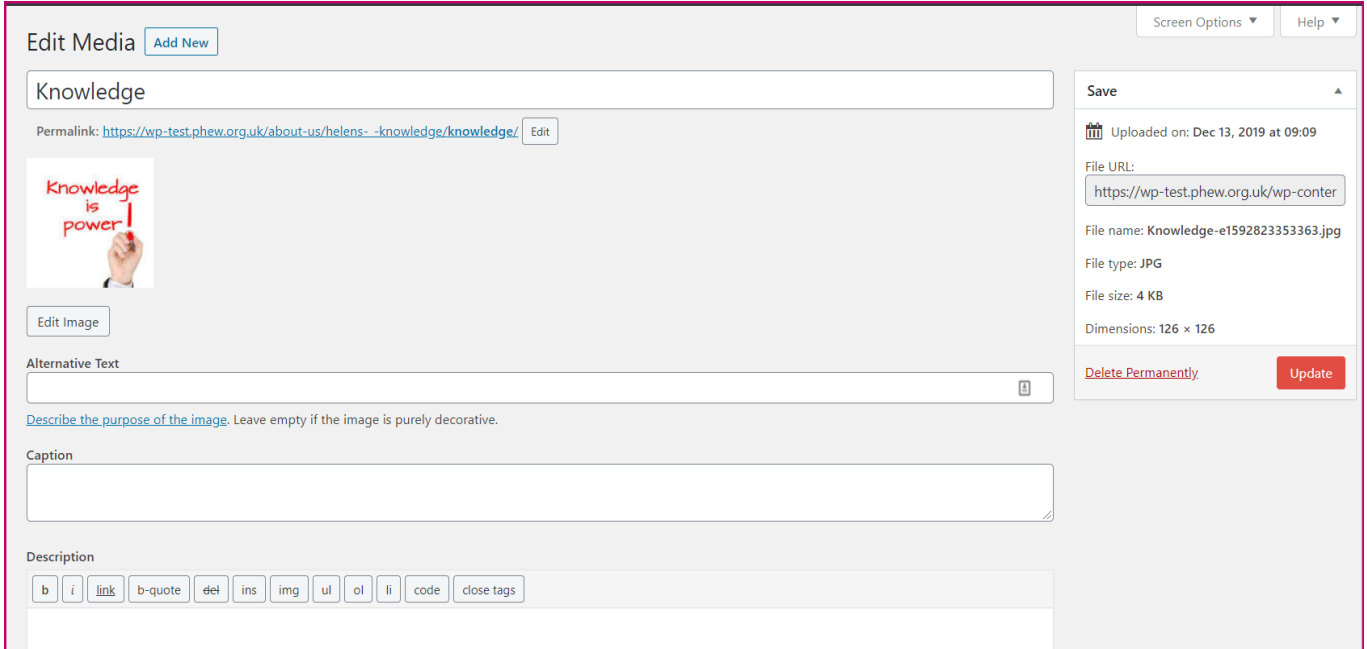
## Image properties



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

- Alt Text: is displayed when the browser cannot render the image.

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

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

To a small degree, it also plays a part in your website Search Engine Optimisation (SEO). Since search engines cannot read images, they rely on the Alt Text.

- Title: is displayed as a tooltip when the mouse cursor hovers over the image in the browser.

- Caption: is displayed underneath the image as a short description.

⚠ How the Images display will be dependent on the WordPress theme in use at the time. You can also include basic HTML in your captions.

- **Description:** is usually displayed on the attachment page for the media, however this is entirely up to the theme that is currently in use.

## Image size
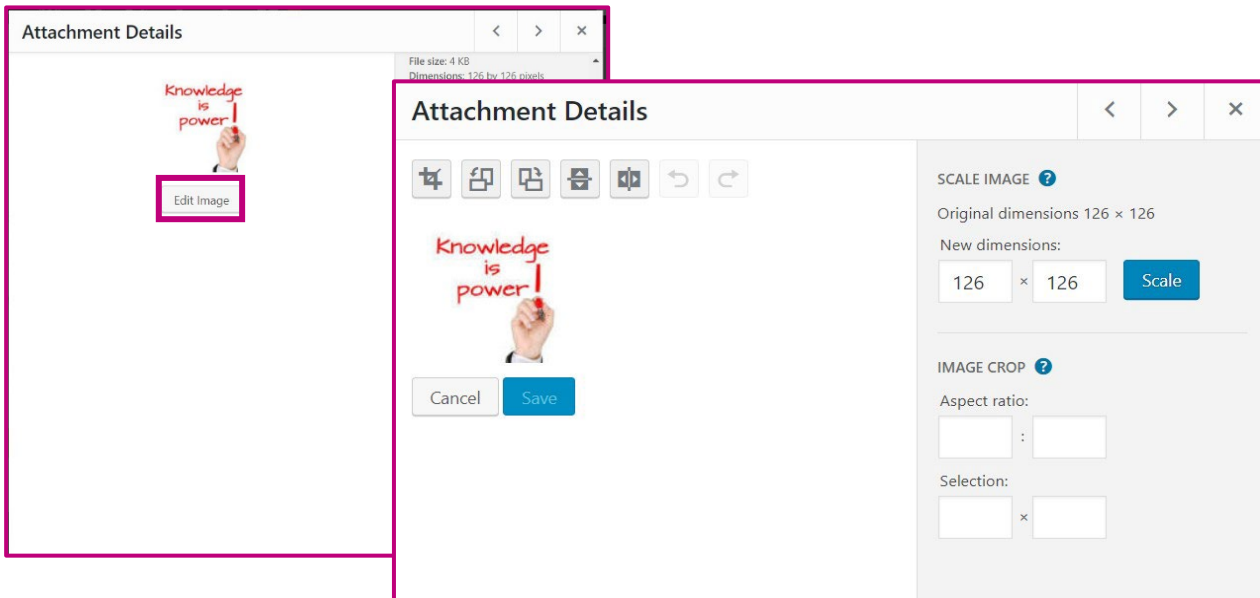


Be careful with image sizes. You will need a good quality image You do not want your image to be too large or else it can make load times very slow for website users.

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

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

- Full size the size you originally uploaded the image in.
- Medium size.
- Thumbnail image.

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

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

## To change the Image size

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

## Editing or removing media from your page or post
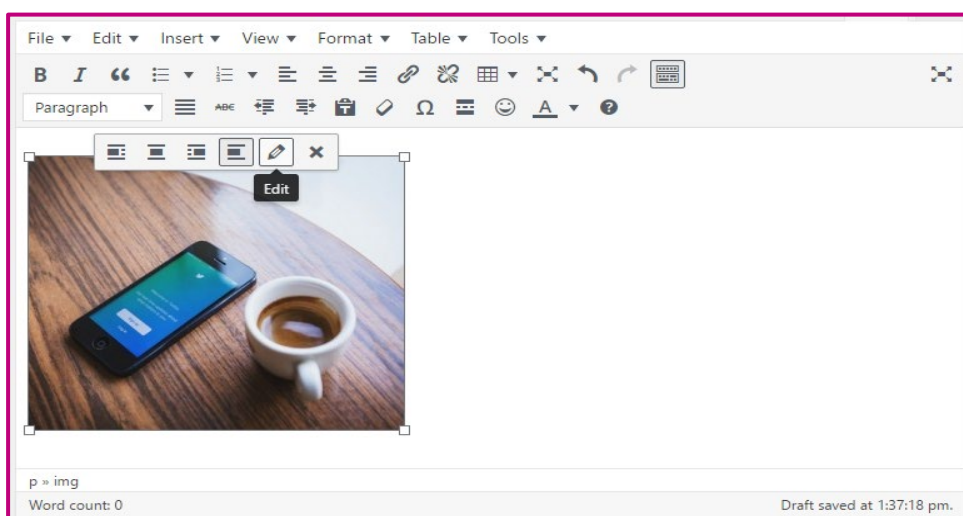


There are various options available for adjusting the layout of inserted images.

After clicking on an image that has already been inserted into your Page or Post, you will see some icons appear over the image.

Clicking the pencil icon allows you to edit the image properties.

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

## Setting a featured image
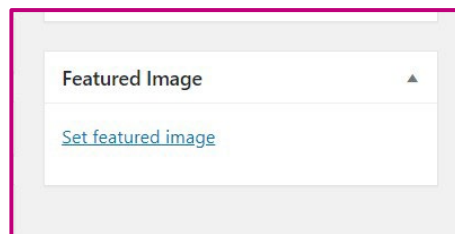


Some themes allow you to specify a Featured Image for your Page and Post. A Featured Image, often called a Post or Page Thumbnail, is usually some sort of image that is representative for that Page or Post.

How these images are displayed is dependent entirely on the design and make-up of your website.

# Pages



Pages are what make up the bulk of your website. They are easy to add, edit as well as remove if you need to. When you click on All Pages from the menu, you will collectively see a list of all the pages that have been created.

At the top of the page you can view how many Pages in total you have in your site and how many are published or in draft.

# How to add a Page
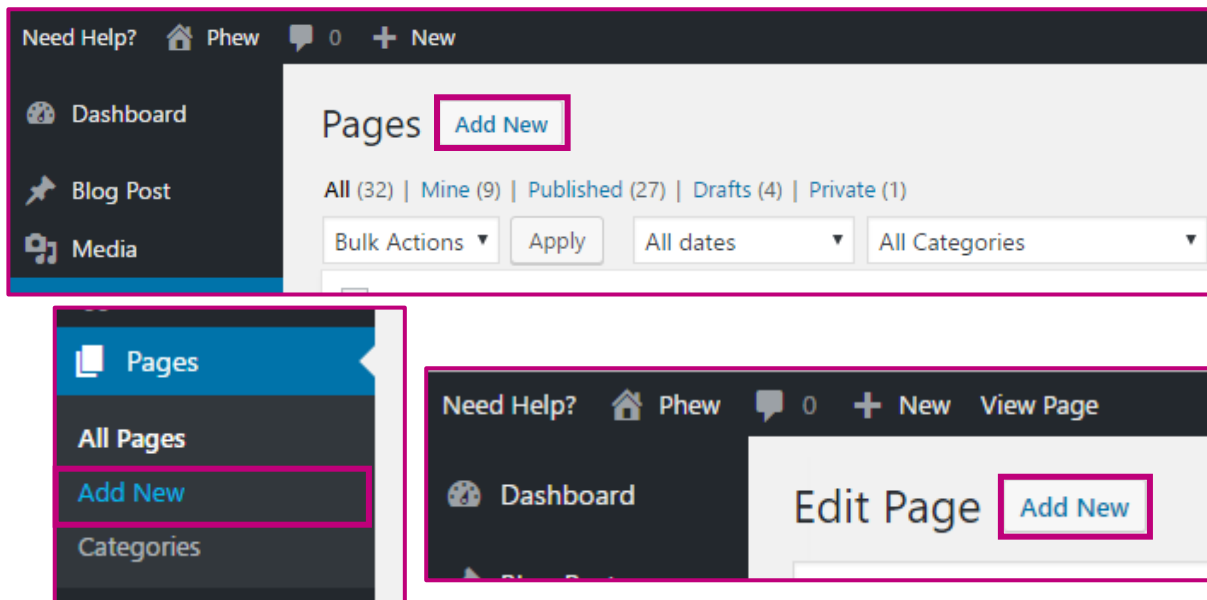


Adding content to your site is an easy process no matter whether you are creating a Post or a Page. The procedure for both is almost identical. Apart from how they display on your site.
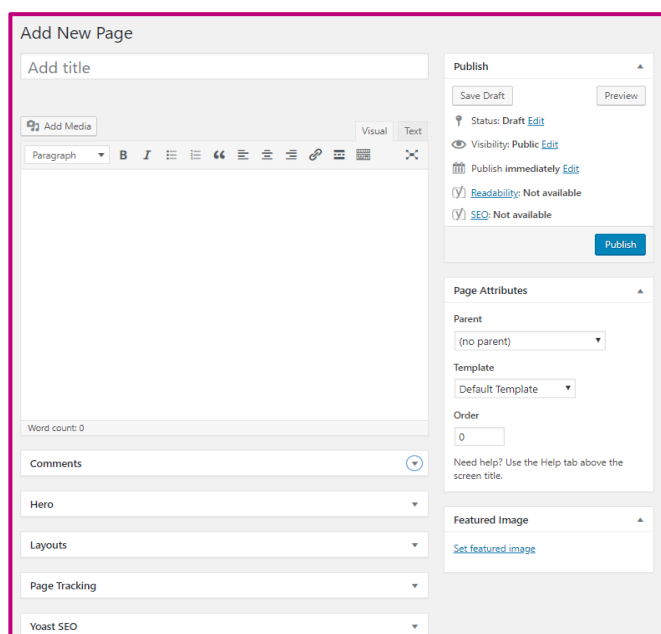


There are three ways you can add a new Page:

- Select Add New on the dashboard.
- Select Add New when looking at the pages overview.

- Select Add New when you are viewing an existing page.

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

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

## To add a page to your site:

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

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

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

# Text Editor
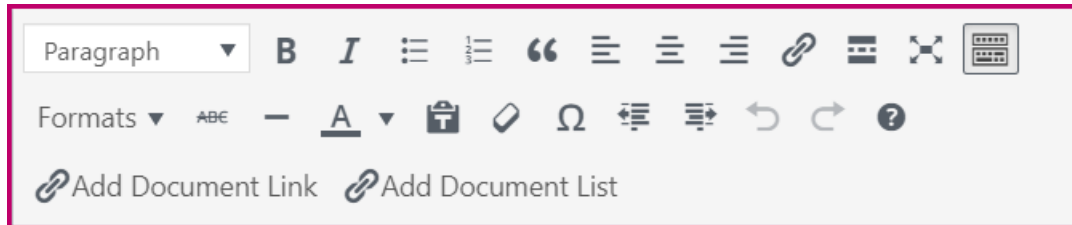


Once you have entered your Page title you can use the Text Editor to insert the main bulk of copy, images, videos, voice clips and links. Many of the features on this box are like Microsoft Word or other word processors.

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

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

✓ Always paste as plain text.

# Analytics Tracking

This is usually set up at before you go live on the site when your Google analytics dashboard is created. If you need to add a different tag you will need to email support@phew.co.uk so that we can add this to your dashboard.

# Hero's



A Hero is a sliding picture bar that scrolls at the top of your page you can add links to and different pictures. A Hero is a sliding picture bar that scrolls at the top of your page you can add links to and different pictures. A Hero is usually located on you home page.

To add an image to the Hero

- Go to the page your Hero is located and edit page
- Scroll down and open the Hero
- To add a new image select Add row.
- If the image is already in your media library select the image, if not upload it.
- If you want to add some text in a banner to go on the image, type in the text in the text editor.

- If you wish for the user to click on the image to take them to another part of your site add a link.

In Style choose from the drop-down where you would like the banner to be located on the image.

⚠ The images used should be of the size 1920 X400 for the optimum.

## Layouts

### Text Block



This is just a block of text that you can add to the layout of your page

# Text & Image



This layout allows you to add an image next to your text

**Flip:** allows you to switch the image to the right-hand side of the text

**Thumbnail size image:** crops the image to a small size and a text to two sentences long

✔ Optimal 450 x 350 - larger images are fine and will be cropped.
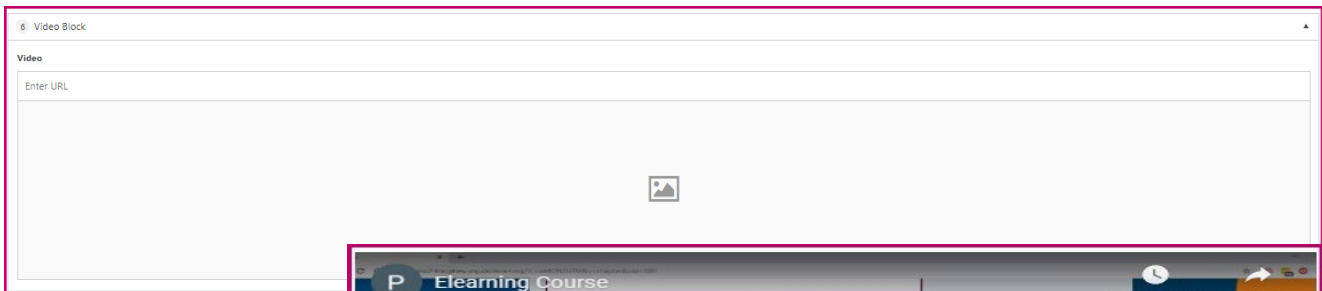
# Table Block



Table header of four blocks after you have added the titles of the blocks you will then be able to add your rows for each block by selecting the Add row.

## Text & Text
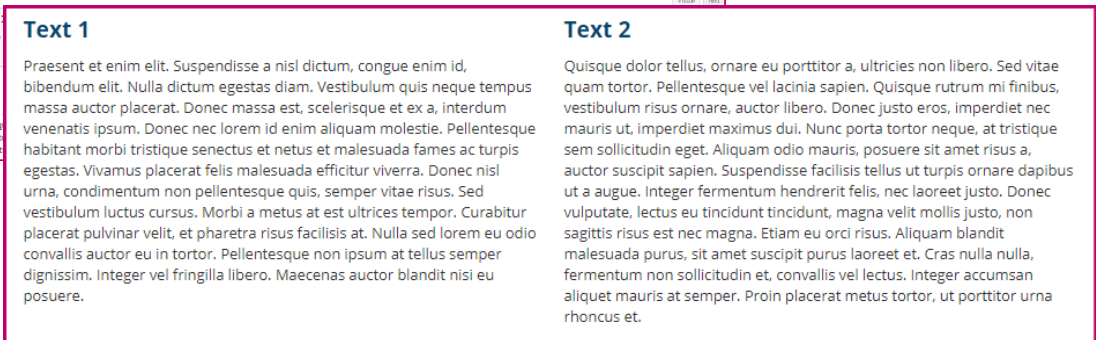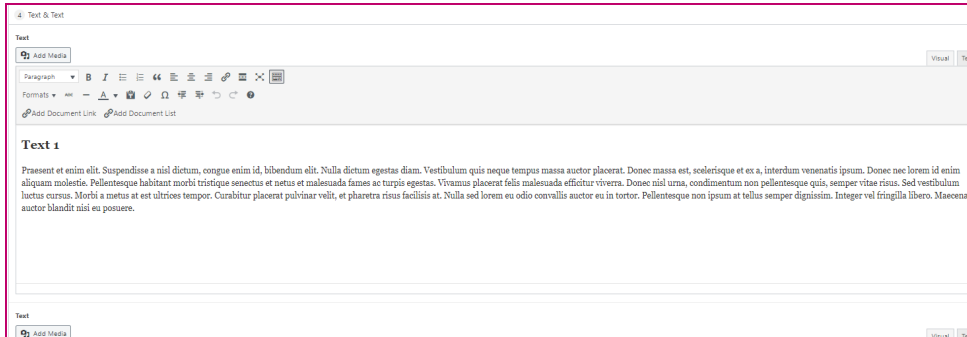


This is how you can put text side by side on a page.

## Video Block



In the video block you will need to post your URL (location of the video) of the video in the URL section.

## Content Blocks
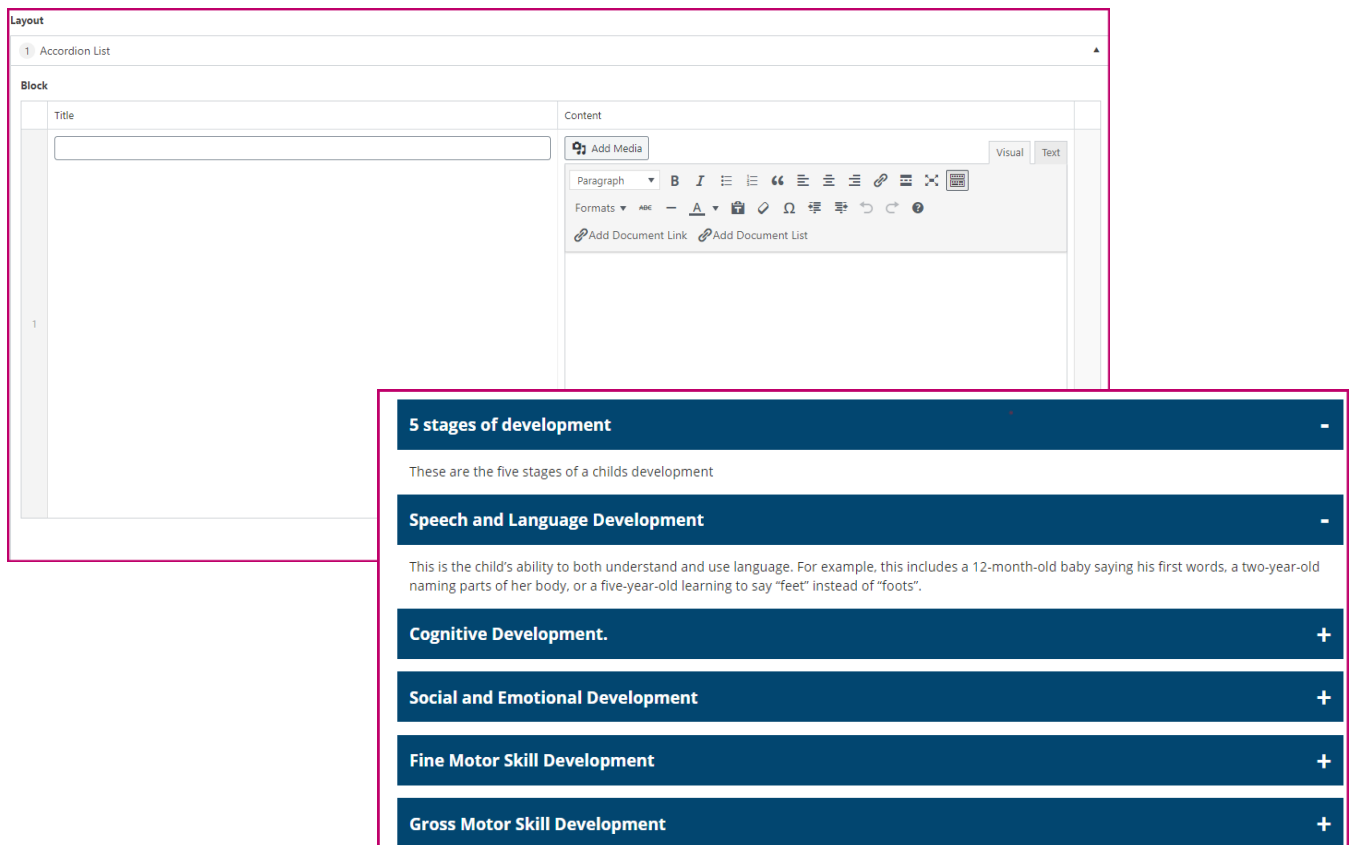


- **Title:** only add a title if you want the title bar to be shown
- **How many columns choose from**: the drop-down you can have 2, 3 or 4 columns.

In the Blocks add the title of the block the link to the page and an image which must be size 450X350.

⚠️ The example above shows why it is so important to have the right size images.

## Accordion List



Another way to break up your pages is to use the accordion it hides blocks of text underneath the title until the block is selected.

- **Title:** the title block.
- **Content:** add content to the page in the text editor.

# Icon Tiles



You may use this on a page to link to other pages within the site rather than a list

- **Title:** the title of the icon.
- **Link:** the link to the page.
- **Icon:** the icon you wish to use.
- **Colour:** the default is NHS Blue.

## Call to Action
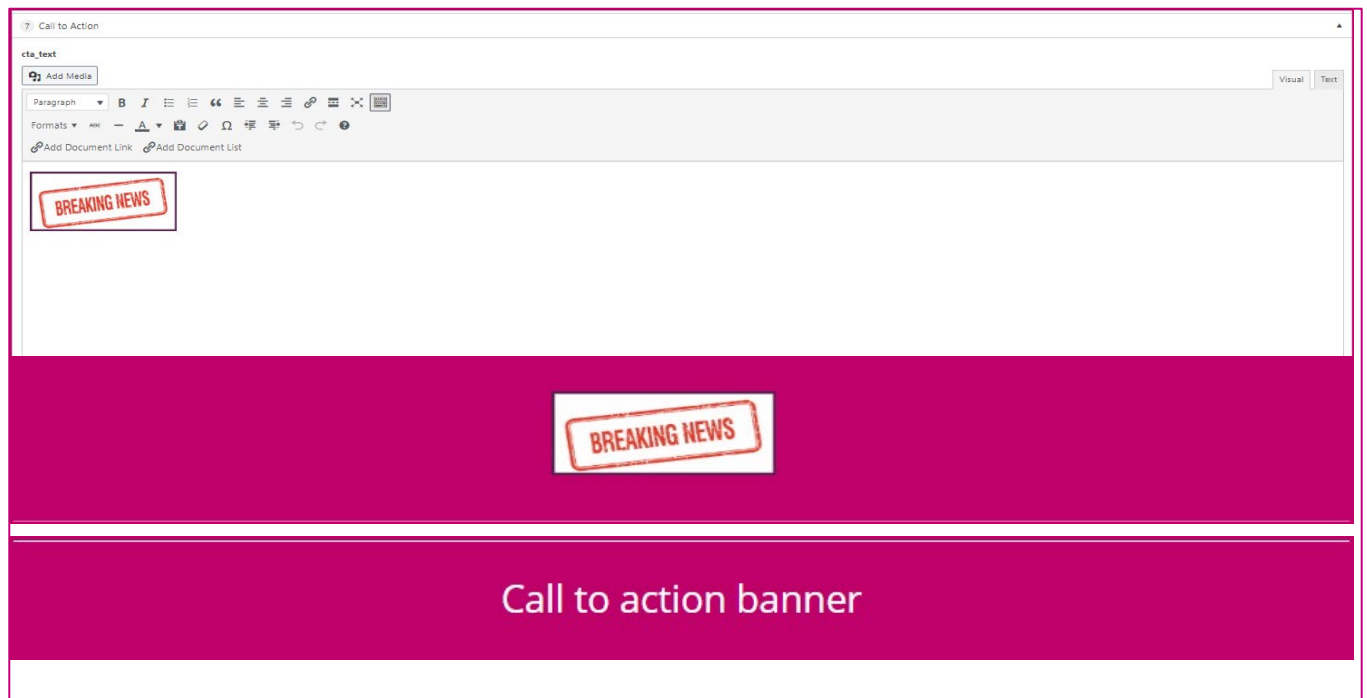


This is where you can add a banner on your page to either publicise a specific event or topic.

## Gallery
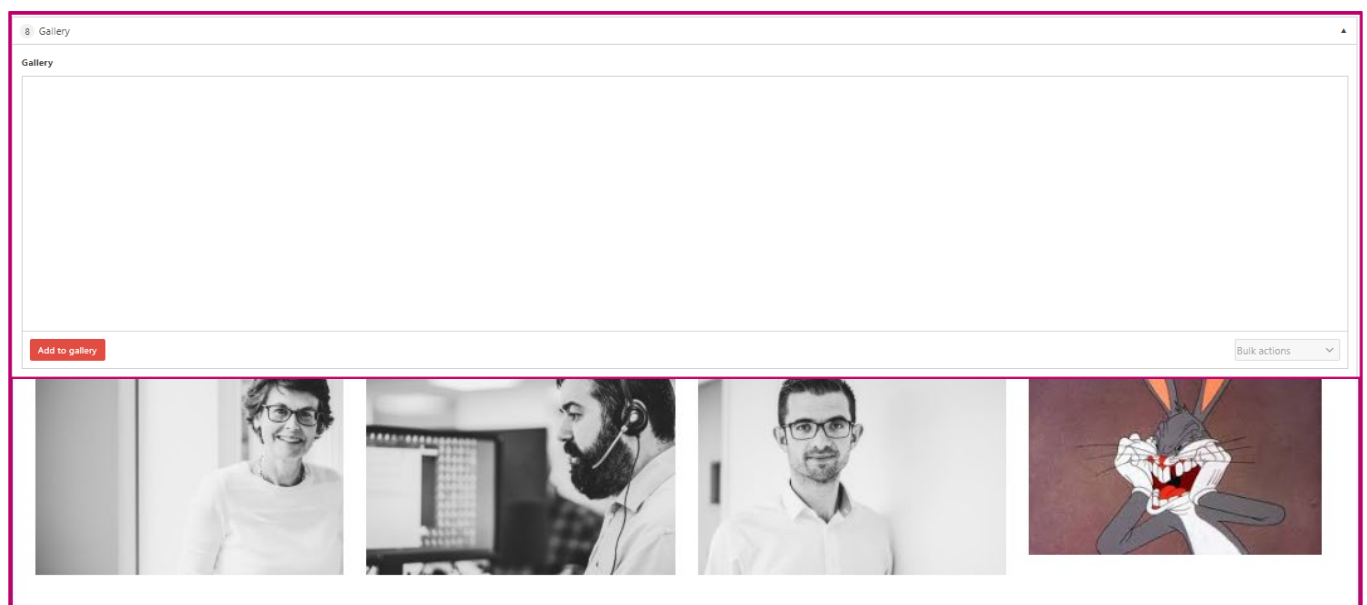


This is where you can add a lot of pictures to a page usually a team you will select Add to Gallery and choose from the Media Library the images you wish to display.

![Phewl Websites logo]

# Link Listing Layout



This allows you to control whether you want a side menu with different links to pages.

Select Children Pages to be linked to the Page attributes and will display all the child pages for that parent/

Alternatively choose Custom Links to choose the pages you want to display. Select link to choose the pages that you want to display.

There is an option of a title bar not normally used.

✔ If using the title bar, then this should be your first layout.

# Page Attributes
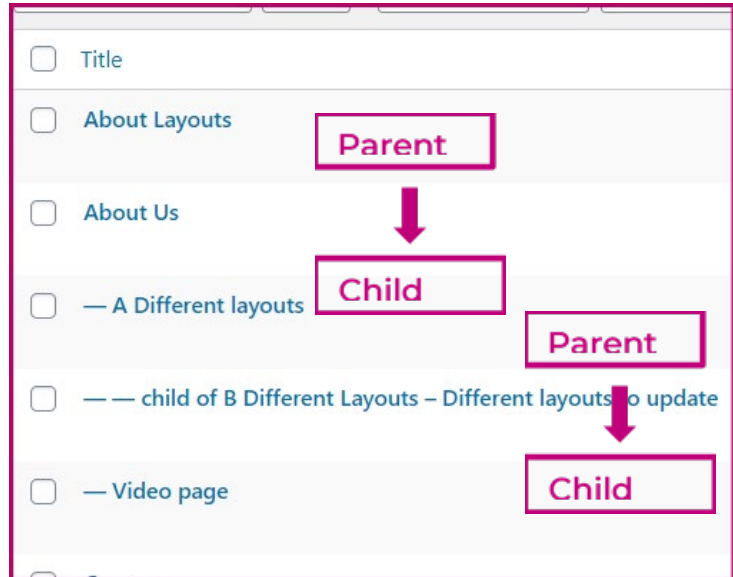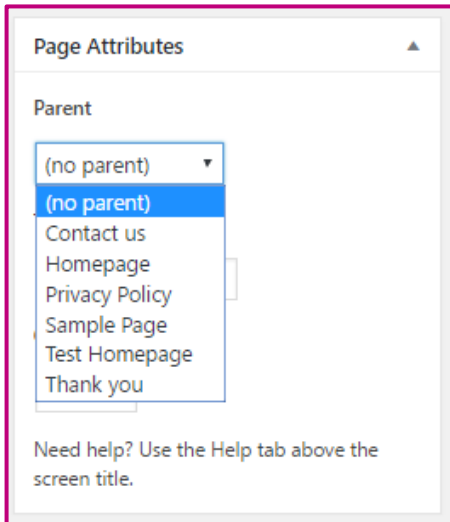




This is where you can assign the Page to a Parent. Where the page belongs or is connected to using the Parent drop-down menu.

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

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

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

## Alphabet Groupings
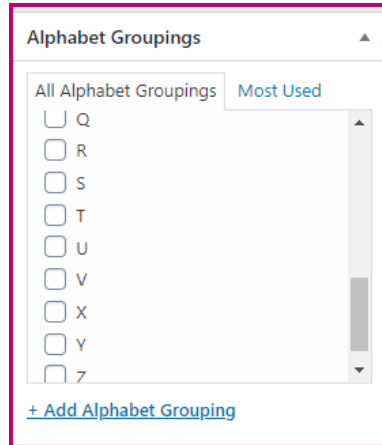


This section is where you will put the page under an alphabet grouping which will link to a user directory.

⚠️    This function may not be available on your site please contact us if interested in having this added.

## Services
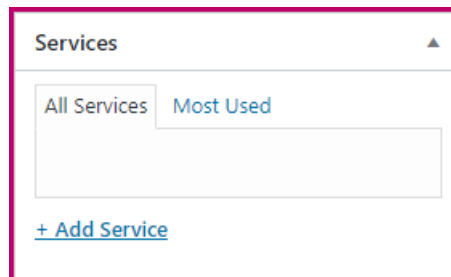


This section is where you will put the page under a service category which will link to a services page.

⚠️    This function may not be available on your site please contact us if interested in having this added.

## Yoast SEO
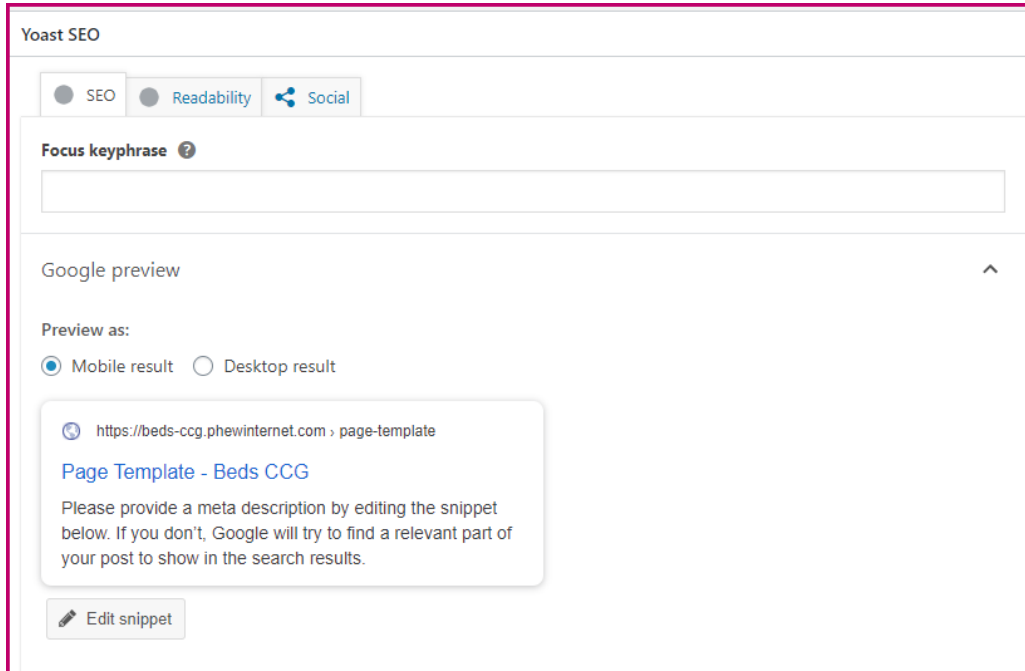


By updating the snippet will let all the platforms (Google, Edge, etc) exactly what your page is about.

It does a readability check against the Felsch reading ease score.

## How to edit a Page



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

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

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

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

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

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

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

## How to delete a Page
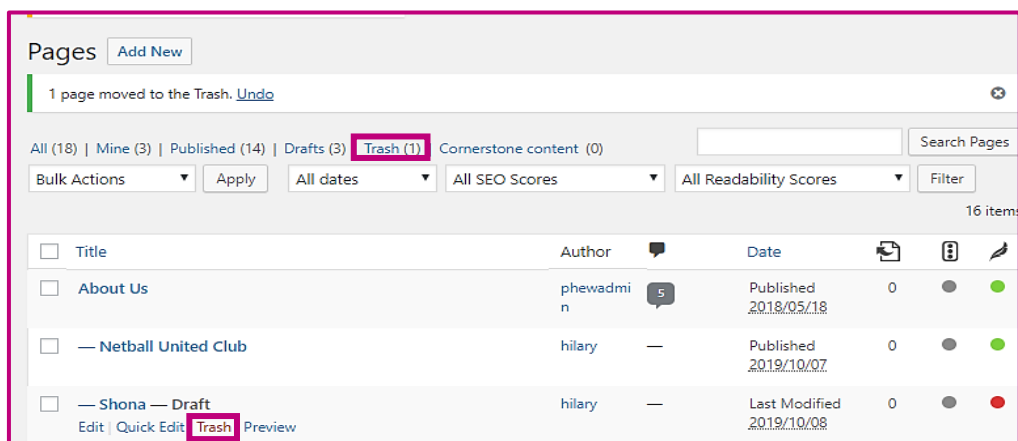


If you wish to delete one of your Pages or Posts.

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

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

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

## How to add your page to the drop-down menu
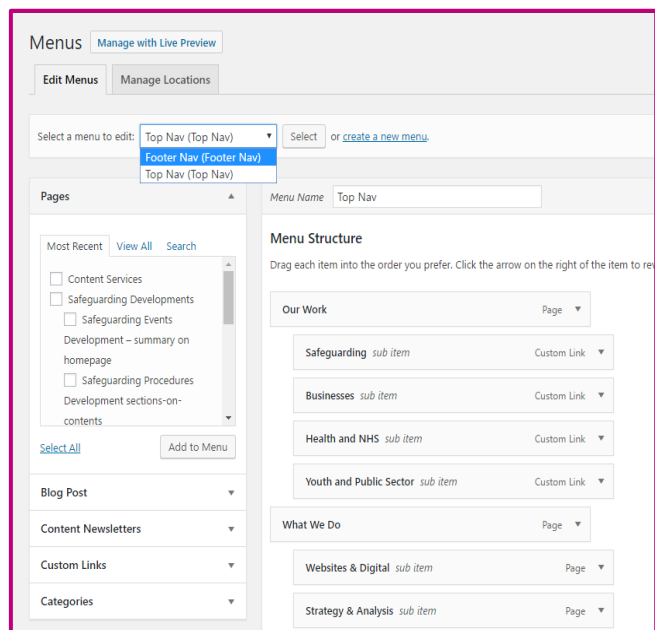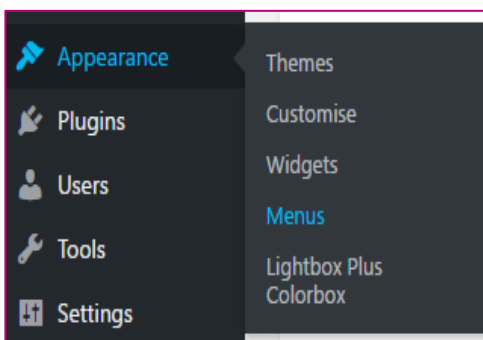


Should you wish to add your newly created page to the drop-down menu, you can do so via the Appearance and Menus option.

- You must ensure you have selected the correct menu in the options as this is where you will be adding the new page.
- Use the left-hand side box to select your name page
  There will be the option to view the most recent Pages, all Pages or use the search functionality.
- Just click on the title of each to switch between the tabs.
- Once you have clicked on your page, press the Add to Menu button.

WordPress will automatically add this to the bottom of the list.

- You will then need to click, drag, and drop the Page to where you want it to sit.



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



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

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

## How to remove a page from your site


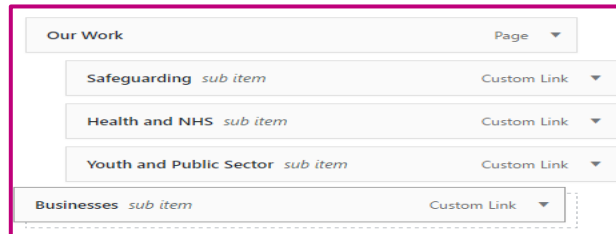
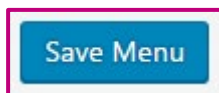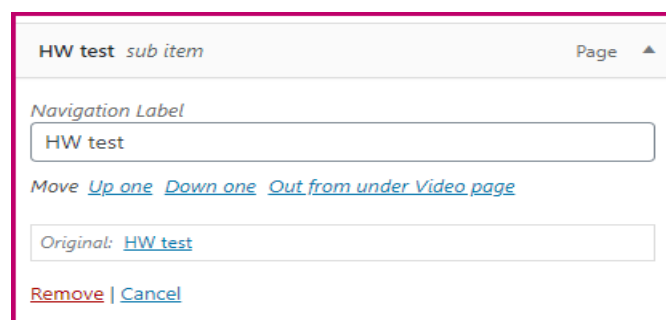Should you wish to add your newly created page to the drop-down menu, you can do so via the Appearance and Menus option.

- You must ensure you have selected the correct menu in the options as this is where you will be adding the new page.
- Find your page on the menu and select Remove this will remove the page from the main menu.

# Adding links to a page
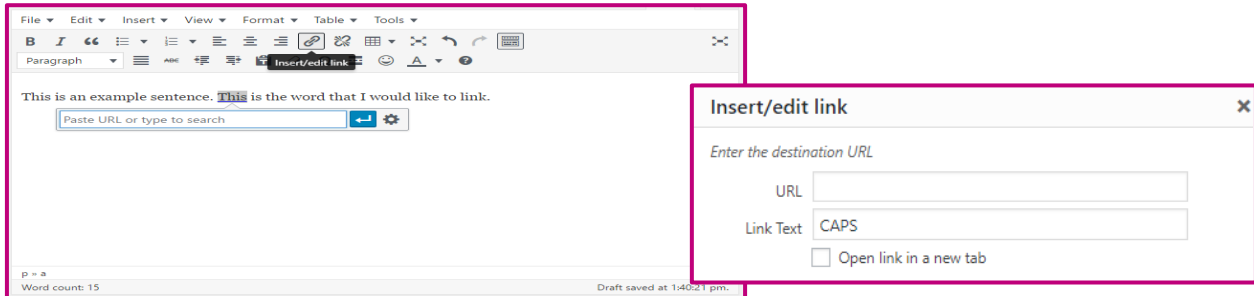


- If you wish to add an external link to your page, all you need to do is highlight the word you wish to link and then click on the link symbol:
- Enter the web address into the URL.
- Click on the cog and under link text tick the open link in a new tab.
- Click the update button.
- ✓ And it is always best to check the Open link in a new window or tab. This way, your webpage will still be open, and your users will not be completely navigated away from your website. Once they have finished looking at the external link and closed this down, your site will still be there for them to go back to.
- Click update to update the page.

## How to remove a link
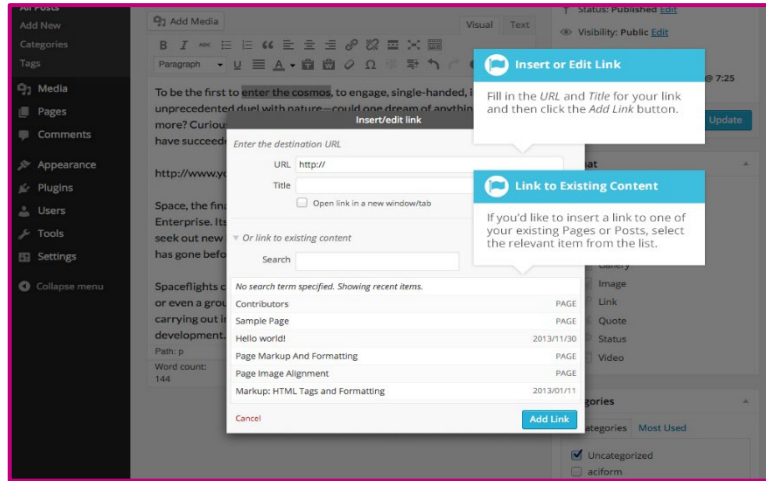


- To remove the link, highlight the word that you connected the link to and simply click on the Remove link symbol and remember to update the page to save the change.

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

# Linking internal pages
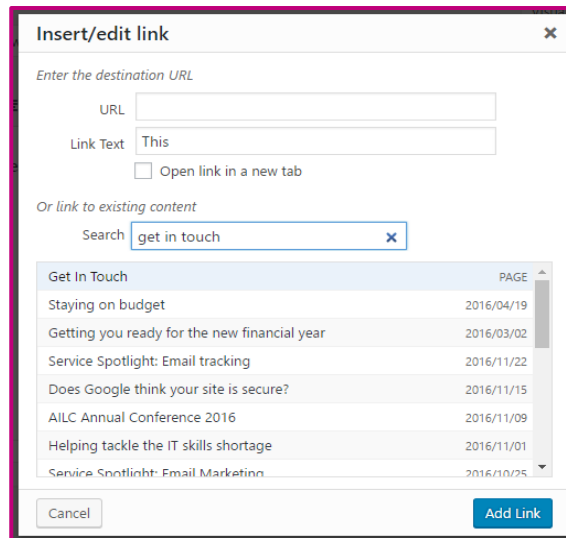


Occasionally you might want to refer a user to a different page within your website. This essentially is done in the same way however, this time we click on or link to existing content; you do not need to worry about opening a link in a new window here as users are already on your site.

You can use the search to quickly find the page, for example a common one is the Contact us page, once you have searched for and selected this page you press Add link.
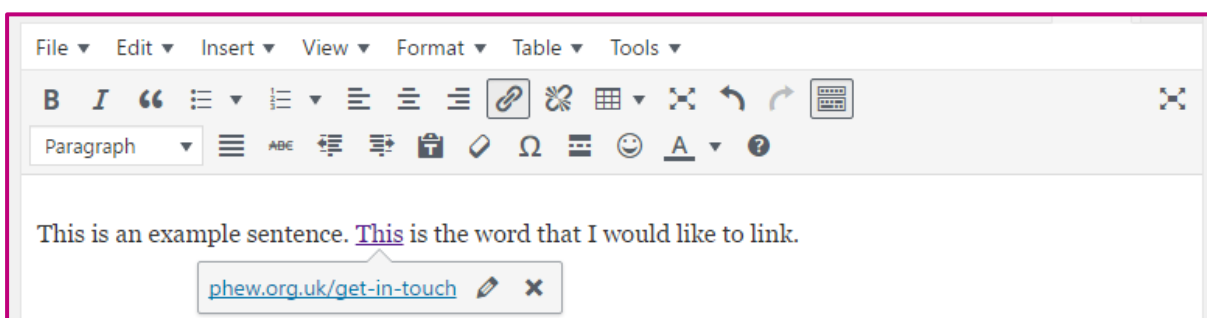
# Linking files - PDF's and or Word documents
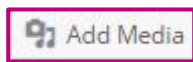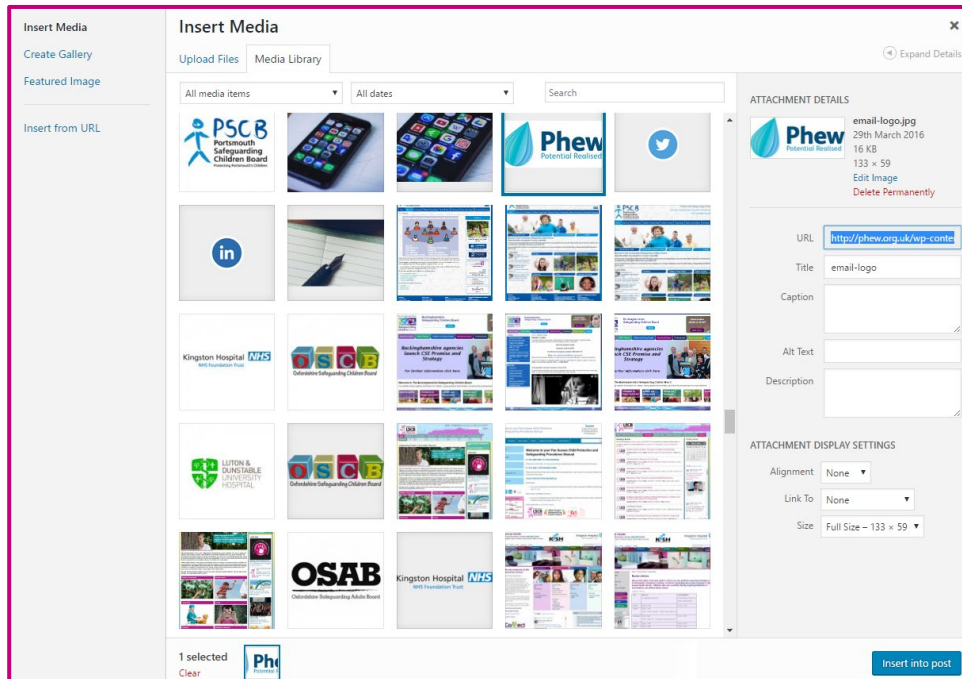




👍 Triple click, the URL name to highlight the whole URL – some will be hidden that you cannot see.





This is an example sentence. This is the word that I would like to link.

phew.org.uk/...6/Phew-Online-Audit-Tool.pdf
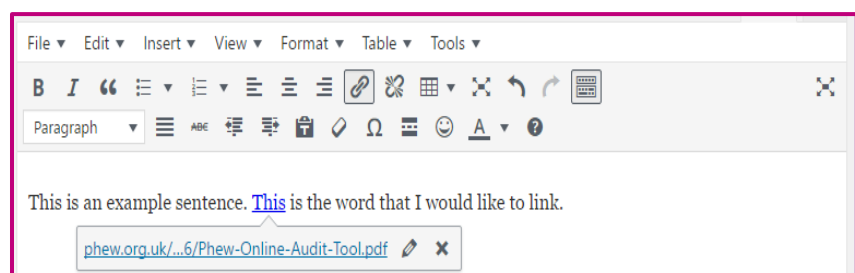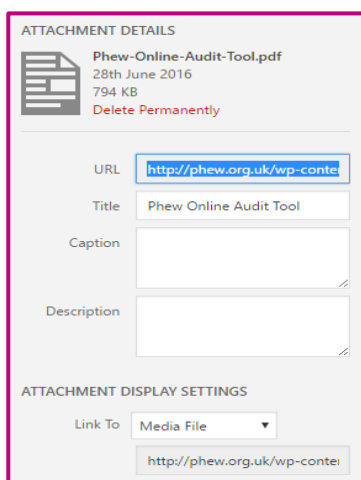
# Partners

⚠️ Your site might not be set up to use Partners.



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

## To add a new Partner

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

## To edit or remove or view any Partners

This works in the same way as Pages and Posts.

# Documents and Resources



Documents is a document library used to manage your documents on the website instead of using the Media Library. The benefit of using the library is that you do not have to change the link to the document in any page that you refer to it.

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

In the document section you can see that each document is very similar to post or pages.

On the Text editor toolbar, you can add a Document Link and the Document List. Add new document.

- Select the Add New button at the top of the Documents page.

- Add the documents title in add title.

- In the text editor below, you can add a brief description about the document, but it is not necessary.

- Scroll down to Documents and tick auto download if you want the document to download to documents

- if you are adding a video click Use an embed video? it will open up a Video section to copy the URL of the video.

- Under File select add file the same way you would media.

![Phewl Websites logo]

- On the right-hand you can publish and or save as a draft like the Pages and Posts.

## You can categorise your documents



Like post and pages, you can add categories to you documents. You can add them under Documents > Categories if you are doing a bulk creation or you can add on the fly as you add the document.

The difference is that with documents categories you can create a password.

# Document links on the editor toolbar
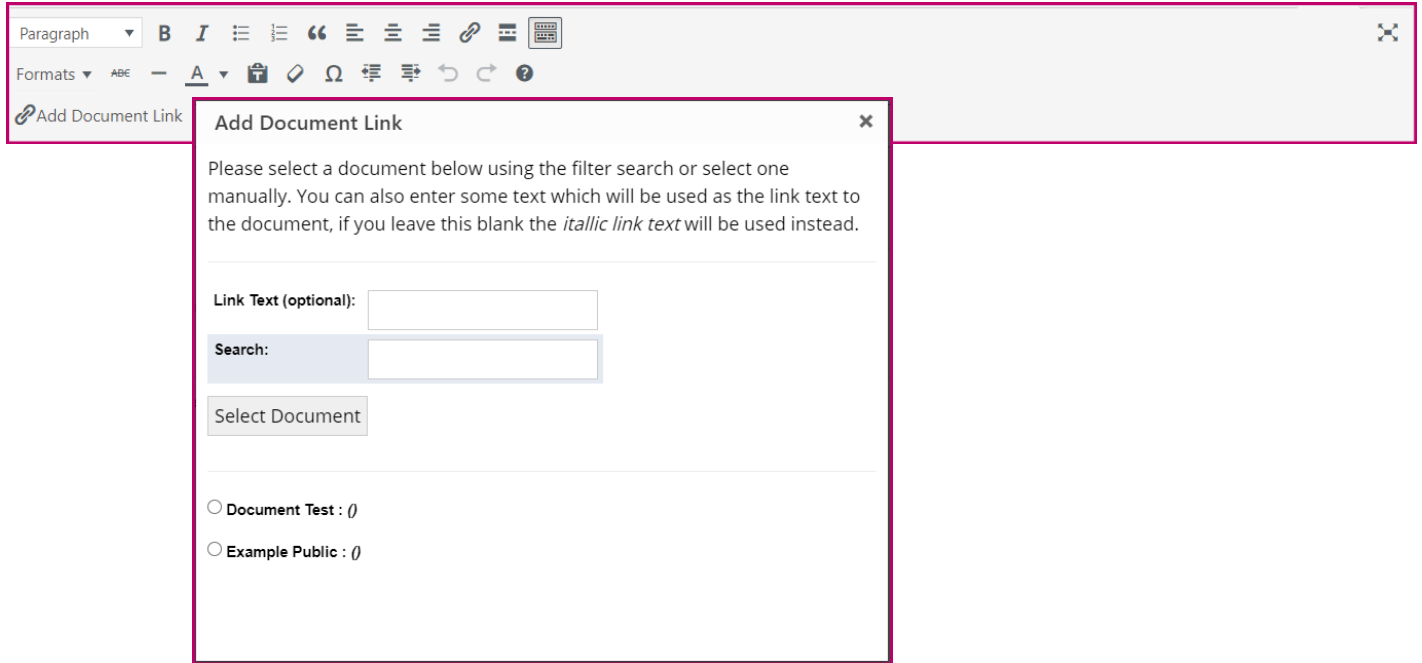


These links can be used on posts and pages and by selecting this link will allow you to either choose a document from the list manually or search for it. You can add your own text in the link text or leave blank. The system will use the document's name. Once you have chosen your document, you can then press Select Document and the link will be added to your page.

# You can also password protect your documents
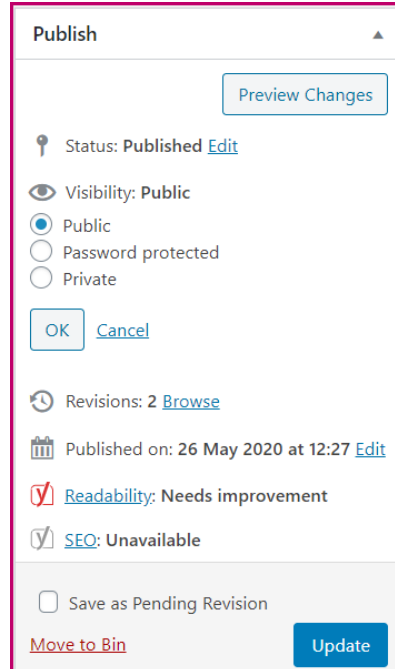


To password protect your documents.

- Go to the Publish section of your document.
- Select Visibility.
- Choose Password protected.
- Add a Password.
- Select Ok.

# Date of published document
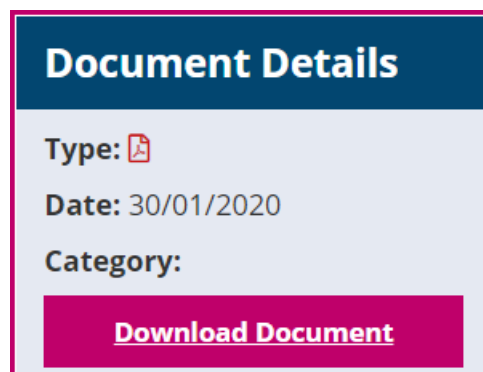
If you upload a new version of the document. you will need to change the published on.

- Go to the Publish section of your document.
- Go to Published on.
- Select edit

👍 The dates are in American format Month, Day, Year

- Select the month from the drop-down, then type in the day and time
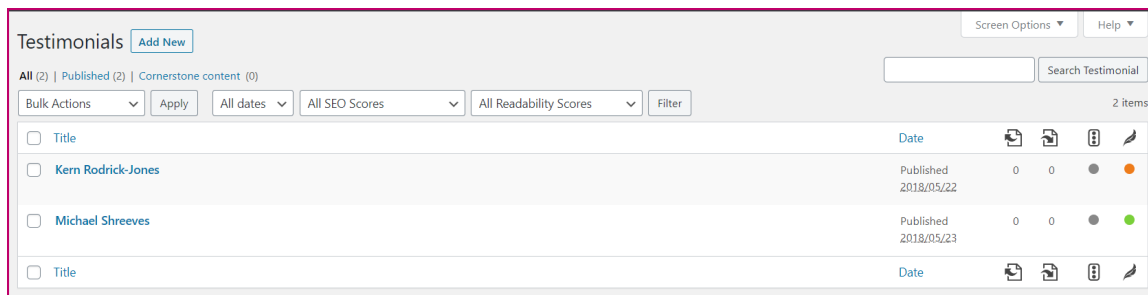
⚠️ You can prepare documents to be published at a certain date and time

- If you have prepared for the future you will need to select Schedule, if not select Update.

# Phewl!
WEBSITES

# Popups



Pop ups are a great feature that can allow you to add a piece of information to the users of your site. You can add buttons to take them to that place on the site.

## To add a new Popup

- Add a Popup Name

  👍 You can leave blank if you leave several blank it makes it harder to search

- In Active select on you can turn the popup off if no longer required.

- **Display type:** where the popup will be visual this can be on the homepage, all pages or you can select a page.

  In the page selector you can either click on a page or search for a specific page.

✔ All pages will only be on the first page visited

# Testimonials



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

## To add a new Testimonial

- Select the Add New button at the top of the Testimonial page
- Add the Testimonial title, e.g. the name of individual or company.
- In the text editor copy and paste the testimonial.
- On the right-hand you can publish and or save as a draft like the Pages and Posts.

## To edit or remove or view any Testimonial

⚠ This works in the same way as Pages and Posts.

⚠ Your site might not be set up to use testimonials.

# Comments

If you would like the visitors to you site to make a comment about the content, news feed. By giving your visitors this ability, it will allow them to add their feedback to your site or potentially ask questions.
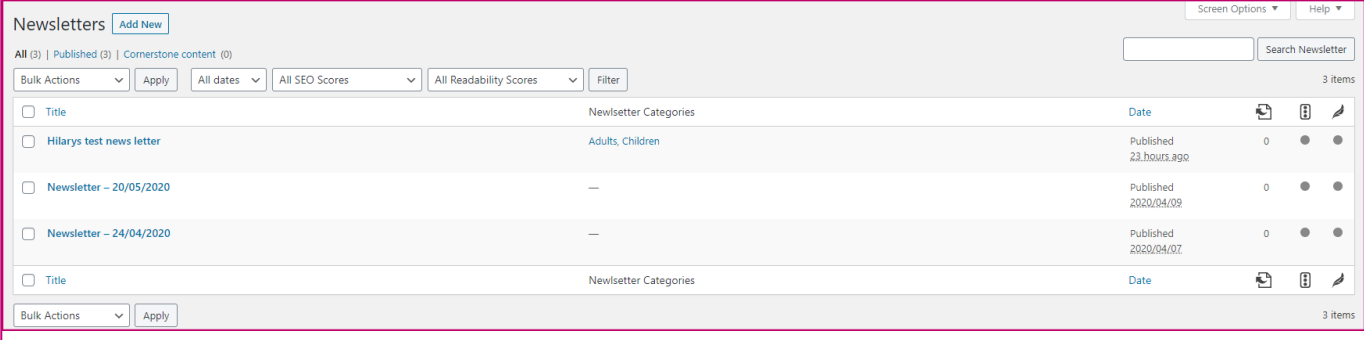
⚠️ Remember if you have this option you could have very visible negative content on your site.

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

# Newsletter

⚠️ New feature if you are interested please contact hello@phew.org.uk

# How to create a Newsletter



To create a newsletter, you will need to go to the Newsletters on the right-hand side of the menu.

- Select Add New button.

## Newsletter Setup

- Title: add the title of the new letter, e.g. May 2020 Newsletter.
- Introduction: this is where you put the body of the text.

Revision ver 4-Feb 2022

- **Category (Audience):** these are the areas of interest that your subscribers would have requested to send the newsletter to. You can tick all, one or several and the newsletter will be sent to those groups.
- **Test Email:** if selected a test email of your newsletter will be send when published.
- **Test Email Address:** Email address you want to receive your test newsletter.
- **Newsletter sent:** this will be marked once the newsletter has been sent out.

👍 If you want to resend the newsletter you can take the tick off.

## Newsletter Layouts

- **Featured Post:** Select one post to appear as a featured post (*this is optional*).
- **Featured Image:** Upload an image that will be featured in your newsletter (*this is optional*).
- **Select posts to show:** you can choose which posts that you would like to send out in your Newsletter.
  - Select the post name under Search this will transfer across under the Select taxonomy box.
- **News Posts Horizontal:** This will display your news articles horizontally in columns of 3.
- Select Taxonomy (classification) choose from the drop-down Under Category or Tag.
- You can save your newsletter as a Draft or Publish it

# How to send a Newsletter
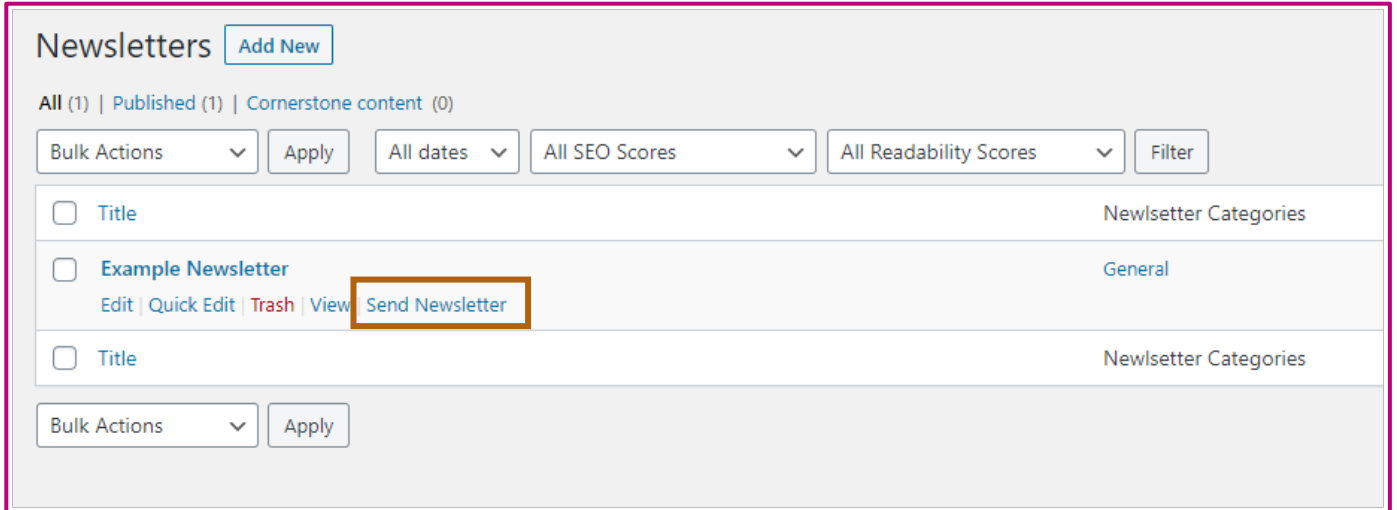


Hover over the newsletter and select Send Newsletter this will send out the Newsletter to the categories that were selected.

If you want to send the same Newsletter to a different category you will need to edit the newsletter, change the category, and removed the tick from Newsletter sent.

✓ Create a different newsletter.

# Newsletter preview
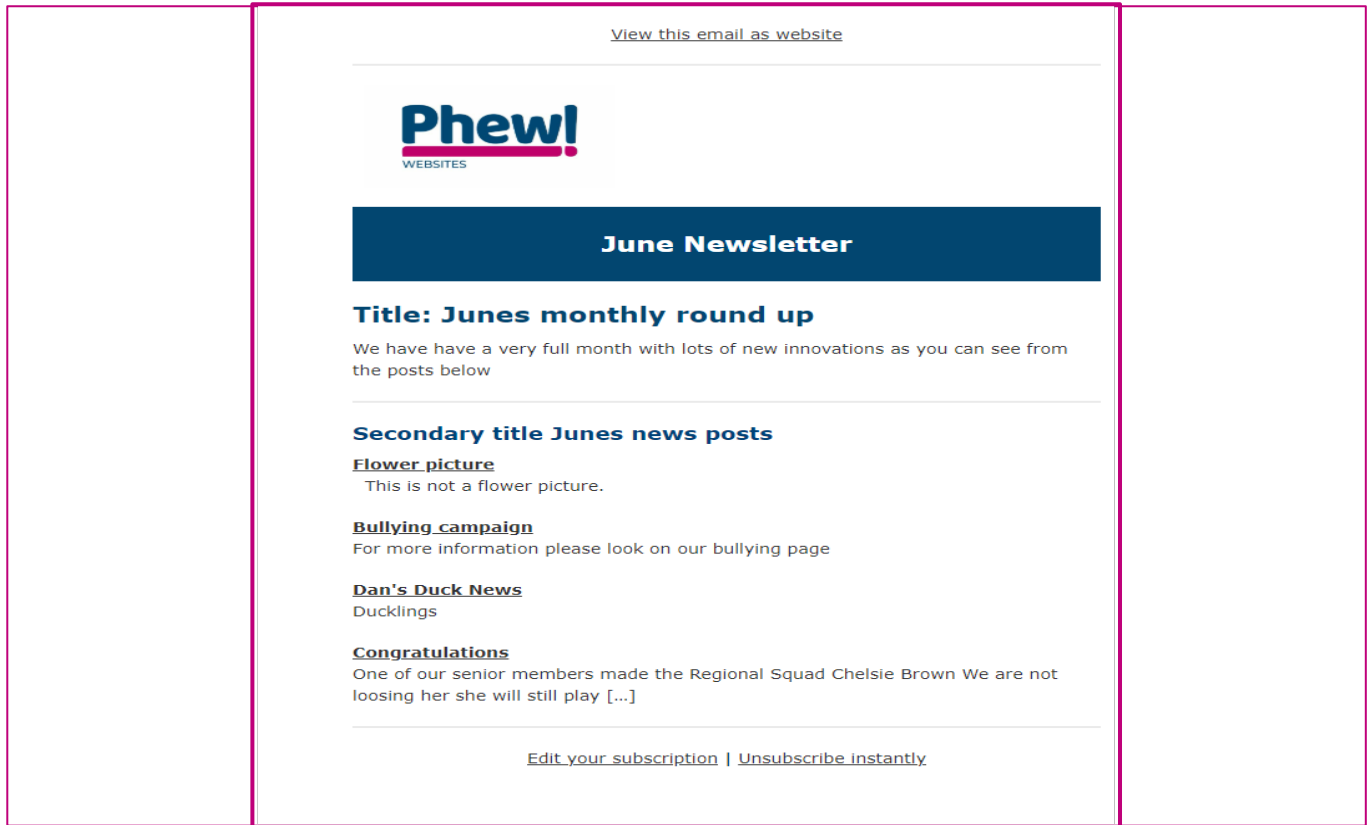


Allows you to look at the newsletter before you send it out.

# Newsletter options

The Newsletter also offers the subscriber various options:

- **The view the email as a website:** puts the newsletter email into a website
- **Edit your subscription:** this allows the subscriber to choose more newsletter categories
- **Unsubscribe instantly:** removes the subscriber from the site and newsletter.

# Newsletter categories



To add new category select Add.

Name: name of category for your newsletter.

Slug: This is a URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.

Parent Category: You can set up subcategories by using the parent ones these are rarely used.

Description: this is a fuller description of the category this is rarely used.

# Newsletter signup

This is what your users will see to sign-up to the newsletter. When they submit, they will receive an email asking them to confirm registration when they confirm the options will be updated in the User registration.
usually is advise of internal meeting and where they are locations

## Users

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

Summary of roles:

- **Administrator:** who has access to all the administration features within a single site.
- **Editor:** who can publish and manage posts including the posts of other users.
- **Author:** who can publish and manage their own posts.
- **Contributor:** who can write and manage their own posts but cannot publish them.
- **Subscriber:** who can only manage their profile.
- **Revisor:** who can write and manage their own posts but cannot publish them.
- **General user:** who has access to resources located in the resource module.
- **Newsletter signup:** who receives the newsletter.

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

# User newsletter registration



What the administrator will see when a user registers for the Newsletter. An email is sent to the user to confirm registration.

Note: the screen shots do not show everything in the users just the important sections.

Role: Newsletter signup

⚠️    A user can have several roles

## Newsletter settings

- Interest: the area of interest that they picked from the list available (links to Newsletter Category)

  ✓ Good practice if you add other categories to let your subscribers know in the newsletter so that you can add the category to the user profile.

- GDPR- Optin: this is an opt-in link is on the confirmation email that is sent. When the user accepts it will add a tick in the box.

- GDPR Opt-in date: will be completed when user accepts

  ➔ See Appendices

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

We manage these for you as part of your support contract and are part of the site design. In certain instances, you made need to add certain information in some of these sections and they will have been mentioned and described in the manual. If you need any changes you need to email [support@phew.org.uk](mailto:support@phew.org.uk)

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

# Content tips

## Images

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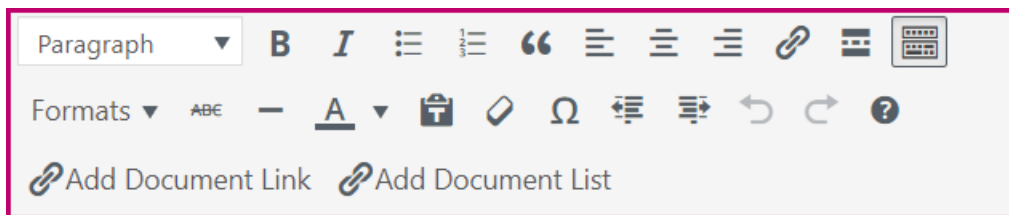
## Text

- If you do paste straight from Word, you can use the rubber tool to remove all formatting.
- Where possible, try and create internal links to different parts of the site.
- Use Headings two and three to create sections on each page.
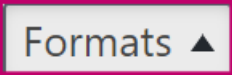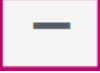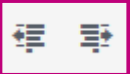
# Appendices
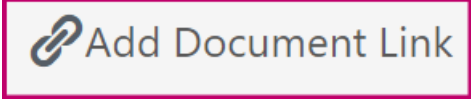
## Formatting

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



| | |
|---|---|
| Add Media | Add images, pdfs directly into content |
| Visual / Text | Amend content with editor or plain HTML |
| Paragraph ▼ | Chose text format: Headings 1-& Keyboard: SHIFT + Alt +7 |
| B | Bold Keyboard: CTRL + B |
| I | Italic Keyboard: CTRL + I |
| Bullet list | Bullet point |
| Numbered list | Numbering |
| " | Insert block quote Keyboard: Shift + Alt + Q |
| Left/centre/right align | Left align, centre align, right align |

| | |
|---|---|
| | Link and or unlink<br><br>Keyboard: CTRL + K |
| | Inset more tag<br><br>Keyboard: SHIFT + ALT + T |
| | Toolbar Toggle<br><br>Reveals bottom layer of options.<br><br>Keyboard: SHIFT + ALT + Z |
| | View in full screen |
| Formats ▲ | Under Formats you will find the Colour Block allows you to instert a block of colour on to your page. |
| ABE | Strikethrough text |
| — | Horizontal line |
| A | Change the text colour |
| | Paste as text |
| | Clear formatting |
| Ω | Insert a special character |
| | Decrease and or increase indent |
| ↶ ↷ | Undo and or redo. |
| | Explain keyboard shortcuts |

| | |
|---|---|
| 🔗 Add Document Link | Adds a link to the document |
| 🔗 Add Document List | Add the document list to the page |

## Terminology

| | |
|---|---|
| content management system | CMS |
| SLUG | A slug is a human-readable, unique identifier, used to identify a resource instead of a less human-readable identifier like an id. You use a slug when you want to refer to an item while preserving the ability to see, at a glance, what the item is |

# Phew!
WEShrrr

# Newsletter email example



Email that your website user will receive when subscribing.

# Adding videos into a text block
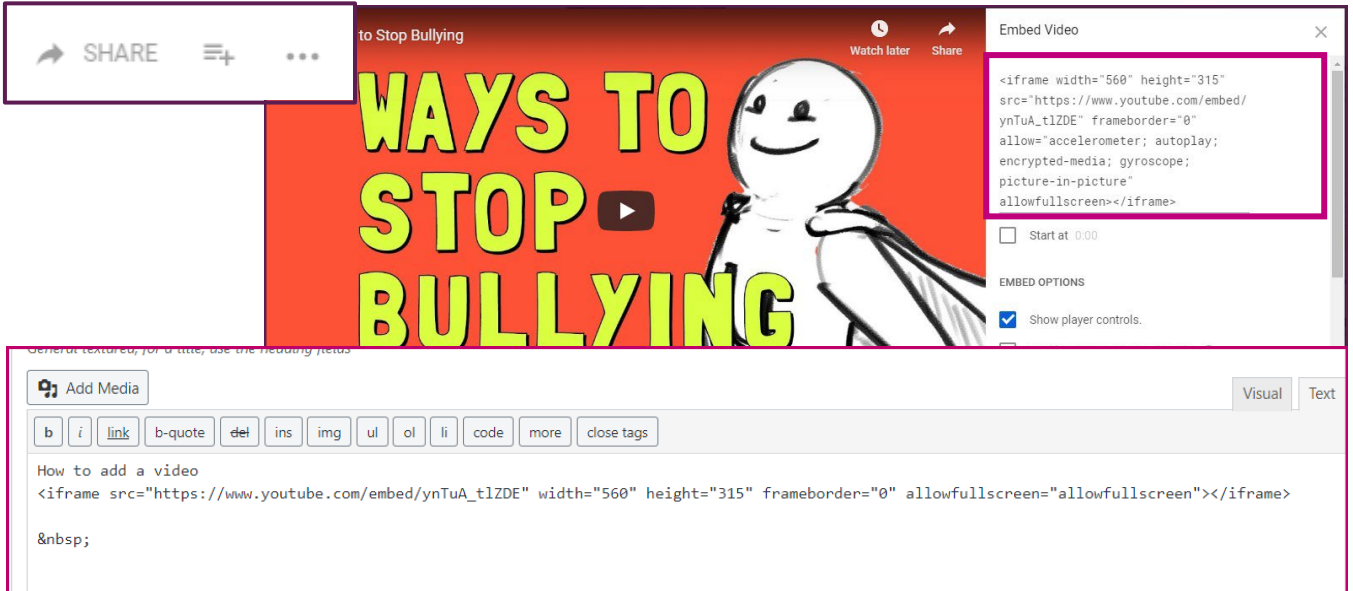


To insert a video, you must click this icon. We strongly suggest using embedded code for this option. If you find the video, you want to use for example on YouTube and go to the share button.

⚠️    you may need login into a google account to access the share button in YouTube.

- Click on <iframe width="560" height="315" src="https://www.youtube.com/embed/ynTuA_tIZDE" frameborder="0" allow="accelerometer; autoplay; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

- Click on Embed
- Select Copy
- Go back the page on your webpage that you were changing
- On the text editor select the text tab next to the visual
- Place the cursor where you want to save the video
- And paste as plain text
- Select your visual tab you will now see you video in your text box

# Accessibility

Here is a sample of things to consider for accessibility.

- Language can be the most welcoming or the most excluding form of communication.
- When we make language accessible to people with cognitive disabilities, we make it accessible to everyone.
- Using accessible language is your chance to provide material in a way that welcomes people with cognitive disabilities into a positive experience.
- Make your point quickly.
    - The fewer words the better.
- Organise your topics in an order that makes sense.
- Make a personal connection.
    - Clearly state why your information is important to the reader and what you want them to do.
- Include lots of white space
- Follow big words or acronyms with a definition in brackets.
    - Sometimes you must use big words or "lingo".
    - Remember to include the definition every time even if you have already explained the word

    Use short words and sentences. e.g. "show" instead of "demonstrate."
- Use pictures that go with the subject you are discussing.
    - Graphics can be a great tool for understanding difficult ideas and concepts.
- Use People First Language.
    - Language can really hurt people when used the wrong way.
    - Nobody likes to be labelled!
    - People First Language refers to an individual as a person before their label.

        e.g. use "she is a person with a disability" instead of "she is disabled."
- Tables have been removed as not AA compliant.

# Document Control

This document is maintained as an electronic document.

## Document information

| Document Title | Delegate manual for WordPress | | |
|---|---|---|---|
| Author(s) | Hilary Williams | | |
| Version number | 4.00 | Document owner | Hilary Williams |
| Date approved | | Document status | |
| Effective date | | Approved by | |
| Superseded version | 3.00 | Date of next review | |

## Revision history

| System Version | Revision No. | Date | Summary of changes | Revision marks |
|---|---|---|---|---|
| Ver 2 | 1.0 | 01/07/2018 | Updated | |
| Ver 3 | | Dec 2019 | Complete review of the manual and structure and update to mark new features. | |
| Ver 4 | | July 2020 | Added all new layout features. Updated the appendices | |
| Ver 5 | | Feb 2022 | New Newsletter Layouts | |

**Phew!**

WEBSITES