

**WordPress Basics  
for  
VLA Website Editors**  
Updated 5/4/10

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**Logging on to the site**

1. Go to the VLA site at <http://www.vermontlibraries.org/>
2. Scroll to the bottom of the side bar.  
Under the **Meta** section you'll see a link that says **Log in**.
3. Click on the **Log in** link.  
This will bring you to the login page. Enter your username and password and click the login button.
4. This will bring you to your **dashboard**.
5. If this doesn't work, or you don't see the login link, you can go directly to <http://vermontlibraries.org/wp-admin> and log in there.

## Updating your profile and changing your password

1. Log on to the VLA site. From your dashboard click on **your name** linked in the upper right corner of the page.
2. At the next screen you will have an opportunity to complete your personal details but you need not re-complete the entire form to change a portion of your profile.
3. Scroll down to the bottom of the page to update your password.

## Dashboard

Your dashboard is a starting point for interacting with the VLA site as an editor. The left-hand side of the dashboard will be where you find options for **writing a post** [click the triangle next to Post, select "add new" from the menu] **uploading a file** [click the triangle next to Media, select "add new" from the menu] or **moderate comments**. The Dashboard does many more things than you will want to do, so it's useful to figure out where the places are that you'll use often.

The Dashboard page itself has some statistics about the site, some RSS feeds from Wordpress development, and information on comments and incoming links.

At the top of your browser window next to the **Vermont Library Association** header you'll also see a **Visit Site** link. You can click this to see what the site looks like. Use your back button to come back to the Wordpress area. You can also follow <http://www.vermontlibraries.org/wp-admin>. To log back in or, if you are still logged in, to go right back to the **dashboard**.

## Writing posts

As an editor you have the capability to write posts and pages. It's more likely that you'll be writing posts, such as events or job listings, so these instructions start with the basics of writing, editing and deleting a post.

Once you've logged on to the VLA site, the second heading in the side bar is **Post**. Click on **Add New** under this heading to get to the screen to write a post.

Once you're at the **Add New Post** screen:

1. Give your post a title.
2. In the post box, enter the text.
3. If you'd like to prepare your post over time, you can click on the **Save Draft** button (in the **Publish** box to the right of your content), which will send the post you're creating to the drafts file as you are working on it.
4. If you'd like to see what your post will look like on the VLA website before you publish it, you can click on the **Preview** button (in the **Publish** box) and your post will pop up in a new window or tab depending on your browser settings. Keep in mind that you will need to allow pop ups from the VLA site in order to use the

- Preview** feature. When you are satisfied with your preview, you can close that window/tab and return to editing your post.
5. When you're ready, you can complete your post by clicking on the **Publish** button (in the **Publish** box).

### **Finding posts and drafts of posts**

From the **Dashboard** you can access the list of posts two ways. You can click on the heading **Post** in the sidebar or you can click on **Posts** or the **(number)** next to **Posts** and you will pull up the list of all posts on the website.

Locate the post you wish to edit in whatever way is easiest for you:

1. You can use the links marked **All, Published, Pending Review,** and **Drafts** just below the Edit Posts header. This will pull up any post that has that status applied, and it is especially helpful for locating **Drafts**.
2. You can apply a **filter** by using the drop down boxes for **date** (default is **show all dates**) or category (default is **View all categories**) and select either the month and year posts were created or all posts with a specific category applied.
3. You can search using the **search box** next to those links and enter anything that might identify your post, such as keywords in the title or body of the post.
4. You can click on any **Author, Category,** or **Tag** in any post on the list and that will serve as a filter for that marker. This is especially helpful if you are looking for a specific person's post, when their name pops up on the list of posts, clicking on it allows you to pull up only their posts.

### **Editing posts and drafts of posts**

You can always make changes to your posts, even after their published, or perhaps you saved a draft and need to get back to it.

Once you have found the post you wish to edit you can simply **click on the title** and the post will open in the editor as it was when you were first writing it. When you have finished editing, click on **Update Post** (in the Publish box) and your changes are made.

Alternately, instead of clicking on the title to enter the post, roll your mouse over the title of the post. **Edit, Quick Edit, Delete,** and **View** will appear under the title.

1. Clicking **Edit** will produce the same effect as clicking on the title.
2. Clicking **Quick Edit** will pull up everything but the text of the post and is especially useful if you just need to change the title or add and delete categories and tags. Two things you'll see here that you don't see elsewhere are the **Slug** and **Password**.

- a. A **slug** is a few words that describes your blog entry. Making use of this feature is optional.  
[http://codex.wordpress.org/Introduction\\_to\\_Blogging#Post\\_Slugs](http://codex.wordpress.org/Introduction_to_Blogging#Post_Slugs)
- b. We've agreed not to use **passwords** on the VLA site.

3. Clicking **Delete** will delete your post.
4. Clicking **View** will allow you to see the post on the VLA website.

### **Formatting a Post**

On the **Add New Post** page there's a basic editing toolbar located above the space for adding your post material. Here I'll point out a few tools that you may want to know about.



This is the **show/hide the advanced toolbar** button. If there is a function you want that isn't showing, like underlining or font options, it may be under the advanced toolbar.



The **split post** button is important because it enables you to split your message with the "Read the rest of this entry" tag. If you are creating a post that will show on the main page of the site (e.g., one in the events, news, ALA, or NELA blog categories) and it will be more than 100 words, or a couple short paragraphs, it's a good idea to split the post as a way to keep the front page of the VLA site more readable.

To use the split post function place your cursor where you'd like the post to be split. Hit return to create a blank line, then click on the split post button, and then hit return again and create another blank line.



The **link** button is important because, unlike in your email, links that you write into a wordpress post will not automatically hyperlink. In order to create a hyperlink, highlight the text you wish linked and click the **link** button.

The **insert/edit link** box will come up. Paste or type your link into the URL box, keeping in mind that you should always have the http:// in front of the www portion of the link. They automatically put this in for you, but if you are pasting a full link, you'll want to delete the http:// provided.

The **target** allows you to **open in a new window**, which will open the link in a new window or tab depending on your browser settings, and also leave the VLA site open. You can also **open in the same window**, which will take the

user away from the VLA site. The default if left untouched it to open in the same window.

Always **title** your links. The title is invisible to you and will not replace the text you highlighted in your post, but makes links visible to screen readers and other accessibility tools.

For now, you can ignore the **class**. Leave it at **not set**, which is the default.

### **Helpful Hint for Cutting/Pasting into Wordpress**

**Please do not cut and paste into the Wordpress text box without following these instructions.** The site was designed to have a consistent look and feel and copying and pasting from other word processors can make unwanted changes to the way the site looks.

If you paste text into the space for adding content to a post, the material you paste may be carrying with it some formatting that you don't necessarily see but may nevertheless impact the look of what you paste when it's published in WordPress. (Unfortunately, this can make your post and the VLA site look messy). Here's how to avoid this situation:

1. Before you paste the text into the form, look at the buttons under the Title box that say **Visual** and **Code**. The default for Wordpress is the **Visual** mode, enabling you to add content to a post without having to write code.
2. Click on the **Code** button. The page will look similar except for the toolbar.
3. Paste your text.
4. Click on the **Visual** button.

Following this procedure before pasting material will remove any hidden formatting. Once you've done this, you can adjust the formatting of your post using the toolbar provided by WordPress.

### **Categories**

The purpose of categories is to keep the posts organized. Each post can (and probably should) be assigned one or more categories. When you're at the **Write Post** page, you'll see an opportunity to assign categories on the right side of the browser window, where it says **Categories**. You can assign categories by clicking on the boxes next to the categories. These categories will be attached to the post when you save or publish it.

If you'd like to create a new category, enter its name in the text box under **Categories** and click on the add button.

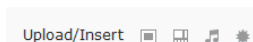
Keep in mind that the categories GMLC (posts to the GMLC blog), Jobs (posts of available jobs), and Volunteers (posts of libraries seeking volunteers for projects) are only to be used for the specific purposes listed. They tell the post to appear only on special pages. So, for instance, if you put the category Jobs on a post about salary negotiations in public libraries, that post would show up only in the available jobs list, and not on the main page as intended.

## **Upload Files**

If you are familiar with attaching files to e-mail, then you may find uploading files and linking to them in a blog posting to be a similar process. There are a couple of ways to upload files. Here's the first way:

1. Once you've logged into the VLA site, look for the third heading on the side bar, which is **Media**.
2. Click on **Add New** under this heading to get to the screen to upload a file.
3. Locate and select your file, then and click **Open**.
4. You may add a **Title** or **Description** if you like. Click the **Upload** button.
5. When you upload a file Wordpress will create a URL that you can use to link to this file.

You can also upload files as you're creating a post. Look for the Upload/Insert files buttons under the title box of a post you're writing. They look like this:



The process works the same as above, except you can also directly inset the link into your post by using **File URL** and then the **Insert into Post** buttons.

A screenshot of the 'Link URL' dialog box in a WordPress post editor. The dialog has a title 'Link URL' and a text input field containing the URL 'http://www.vermontlibraries.org/?attachment\_id=1697'. Below the input field are three buttons: 'None', 'File URL', and 'Post URL'. Below these buttons is the instruction 'Enter a link URL or click above for presets.' At the bottom of the dialog are two buttons: 'Insert into Post' and 'Delete'.

## **Discussion**

For the time being you can ignore the “Allow trackbacks and pingbacks on this post” option.

There is an option to enable/disable comments. The default mode for posts is to allow comments, since a major purpose of the site is to support interaction and facilitate dialog. *However, on Job and Volunteer posts, comments should be turned off.*

## **Permalink**

The **Permalink** is the official name of the link given to each post. They are all unique and consist of the VLA site address and the title of the post. If you think you will be

linking to this post from other places, like email, you can edit the Permalink to shorten the title area so that it indicates the post without being too long. When you're ready to explore this, check out the WordPress documentation at:

[http://codex.wordpress.org/Introduction\\_to\\_Blogging#Pretty\\_Permalinks](http://codex.wordpress.org/Introduction_to_Blogging#Pretty_Permalinks)

### **Post Status, Visibility, and Timestamp**

All of these items appear in the **Publish** box when editing a post, or under **Quick Edit**.

1. The **status** will tell you whether the post is published or in draft form. It's not likely you'll see posts pending review, since we are not moderating posts.
2. The **visibility** will tell you who can see the post. We always leave these on the default **public** because we have agreed not to use passwords on this site.
3. The **timestamp** tells you the time a post was published and is shown next to the image of the calendar. You can edit the time if need be, but the default timestamp for posts is **immediately**.

### **Post Author**

The default author of the post is the person under whose login the post was saved or published. At the editor level, there is an option to change the author, though we probably won't have much need for this.

### **RS Event**

This function makes it possible to tag posts with dates and times that can be displayed under the **Upcoming Events** part of the blog sidebar. Please use this whenever you post something that has a date associated with it.

### **Send Trackbacks**

A **trackback** is a way to notify a website when you publish an entry that references it. Using this feature can enhance the traffic on a website and build connections among blogs/websites.

I've not really made use of this function (yet). Here are a couple of links to easy-to-read tutorials for this.

WordPress Tutorial (scroll to trackbacks on the table-of-contents)

[http://codex.wordpress.org/Introduction\\_to\\_Blogging#Trackbacks](http://codex.wordpress.org/Introduction_to_Blogging#Trackbacks)

Teli Adlam's explanation seems geared to the novice blogger.

<http://www.optiniche.com/blog/117/wordpress-trackback-tutorial/>

## Excerpt

Here's an excerpt from Lynn Terry's *Clicknewz!* that talks about the **Optional Excerpt** feature. (<http://www.clicknewz.com/8/the-optional-excerpt-in-wordpress/> 1/6/08)

Usually when you create a post, WordPress will take a snippet of that post and use it as your excerpt on the category pages - and also in your Feed (if you chose to display excerpts instead of full posts). Unfortunately, it doesn't always display the best little snippet. With the **Optional Excerpt**, though, you can create your own excerpt of each individual post. Doing this allows you to: **a)** use relevant keyword phrases in your excerpt, and **b)** use your copywriting skills to encourage people to click through and read the full post.

Basically, **excerpt** allows you to customize how your post is excerpted in your Feed and on the category pages. When you're comfortable creating and editing posts, this looks like a nifty feature to use.

## Custom Fields

If you're into assigning meta-data to your posts, this function is for you! Check out the details at [http://codex.wordpress.org/Using\\_Custom\\_Fields](http://codex.wordpress.org/Using_Custom_Fields).

## Write a Page

Once you've logged on to the VLA site, the fifth heading in the side bar is **Page**. Click on **Add New** under this heading to get to the screen to write a post.

Once you're at the **New Page** page you'll see that it has almost the same functions as the page for writing posts. On the right side of the browser window you'll see functions/options that are similar to those for posts. One different function to note is the **Page Parent** option.

## Page Parent

You should use the **Page Parent** function to locate your page on the VLA site. If you click on the pull-down menu there will be destinations to choose from, e.g., the VLA Publications.

## Comments

You can get to the **Comments** page by either clicking on the 6<sup>th</sup> heading, **Comments**, in the sidebar or by clicking **Comments** in the **Right Now** box on the dashboard.

## Basic Features

From the **Comments** link on your dashboard you will reach the **Edit Comments** page, where you will see a searchable list of comments made to the site. Mousing over each comment there are links for editing (**edit**) or deleting (**delete**) comments, as



well as a **spam** link. If you click on the **spam** link you'll mark a comment as being spam.

### **Awaiting Moderation & Akismet Spam**

Occasionally, when you log in, you will see an orange bubble with a number next to the **Comments**. These are comments **Awaiting Moderation** and they will be dealt with by the site administrators.

**Akismet Spam** links the **dashboard** header in the sidebar. Clicking on the **Akismet Spam** link will bring you to a list of comments that are spam. **Akismet Spam** is a free plugin (see <http://akismet.com/>) that blocks comment spam.