Website Guide (V3)
by Primary Technology

Website Guide

Introduction

This guide is intended to compliment the remote website training session that you will hopefully have been able to attend. This guide is written to cover all of our websites, so from time to time you may find something you need help with is omitted from this guide or varies a little.

If you need any extra help, please telephone our office on 01274 918 777 or email websites@primaryt.co.uk

Logging in

To log into your website, you will either need to type the address for your website into the browser's address bar followed by /wp-admin. This should bring you to the log in page. Or, on most websites, towards the bottom of the page, you will find a "log in" link which will take you to the login page.

Once you enter your username and password you will be taken to the dashboard.

Dashboard

The dashboard is the main area from which you can manage your website. Everything you will need to do can be reached from this page and most of the options you'll be using can be found down the left hand side. You can return to the dashboard at any point when browsing your site whilst logged in, by hovering over your site name and then clicking "dashboard" near the top left side of the screen. You can also visit your website from the dashboard by clicking on the house icon or website name in the top bar. If you are editing a page and want to get back to the main dashboard click on the "W" (WordPress) icon at the top left of the screen.

Profile

To change details which are specific to you, such as your personal log in details, you will need to hover over "users" on the left hand side of the page and select the "your profile" option. Here you can update your name, email address, change your password and add various other bits of information. Please note that passwords must be rated as 'strong' to be accepted, and please don't write your password down!

To log out of the website at any time, hover over your name in the top right corner of the page and select "log out".

Pages
Adding a new page

Adding a new page to a website is a two step process; initially creating the page, and secondly placing the page in the website menu . To create the new page on your website, hover over "pages" down the left hand side and select "add new".

Giving a new page a title

The title will usually appear at the top of the page. To add the title click on the "add title" text and add your title. If you ever need to change a page title, click back on the title text and alter it.

Saving the page

You can publish the page by pressing the blue "publish" button on the top right side of the screen. Before publishing, you may be presented with a pre-publish check, in which case just click "publish" again. When you see this message, you can disable further pre-publish checks if you would like by unticking the "always show pre-publish checks" message which will appear at the bottom. When you have published a page, you will be shown a what's next box - here you can click "view page" to see the page you've created.

Once a page is published, to save further changes, this button will now say "update".

Edit an existing page

All pages which have been created for your website can be found by clicking the "pages" option on the left of the dashboard. To edit an existing page, scroll through the list or you the search to find the page and click on the page title. Alternatively, whilst you are logged in, navigate to the website page you would like to edit, and click on the "edit page" link in the black bar across the top of the page, we find this is usually the easiest option.

Save as a draft

If you have added content to a new page but haven't finished or are not ready to publish the page, you can opt to save the page as a draft. You will find this link at the top right of your screen, it says "save draft" or to convert a page you've already published; "switch to draft". Draft pages will appear in your page list on the dashboard but will not be visible to the public. Please note draft pages only apply to pages that are not published on your website, it isn't possible to have a published and draft

version of the same page.

Renaming or deleting a page

To rename a page, edit the page. You will need to change the page name at the top and also find the heading of "permalink" in the page settings on the right of the page. Update the text in the "URL slug". To save these changes, press the blue "update" button on the top right hand side of the page.

To delete a page, press the red "move to bin" or "move to trash" button on the right of the page. This will remove the page entirely. When a page is deleted it will move to the bin/trash until it is permanently deleted and before permanently deleting, it is possible to restore the page. To see deleted pages, visit the "bin" or "trash" link on the "all pages" page.

When renaming or removing a page, be sure to reflect these changes in the menu.

Preview a page

When you have added/edited content on a page you may wish to see what this will look like before you publish it. This is a good way to make sure nothing has accidentally been added or selected that you didn't wish to be on the page. To preview your content, select the "preview" button at the top right of the page, then select "desktop" and click "preview in a new tab".

Page revisions

Once you have published a page and are making amendments, you have the option to see changes that have previously been made to the page and if you need, revert the page back to a previous state. To do this, look on the right hand side of the page for where it says X number of revisions and click on this. Using the sliding arrows at the top of the page you can go back through the dates the page was edited to see what appeared on the page at each time and who made the amendment. If you wish to revert the page back to one of these dates click the blue "restore this revision" button. To return to the page editor from this section, click the "go to editor" link on the top left of the page.

Editing the permalink

The permalink is the address that your page is accessed by going to - for example, if your page is called About Us, the permalink would be about-us, making the URL of

that page yourwebsite.co.uk/about-us/. If you change the name of a page, you should update the permalink to match, or for example if a permalink is very long, it's best to shorten it. You will find the permalink on the right handside of the page within the page settings, under the "permalink" heading. All you need you need to do is update the "URL slug" field accordingly and click "update" when you're done.

Page attributes - parent page

On the right of the screen under the heading "page attributes", you will find a dropdown for "parent page". This is for organisational purposes and on some websites is required for certain functionality. Here, you choose which page or section of the website you want the page to come under. So for example, if you have a page called Events, this would likely come under News & Events.

Page attributes - template

When your website was built, a few different page templates were created, and these control the layout of a page, or the things that are displayed on a page. Often, the default page template is fine, however sometimes you may need to choose a specific page template, such as full width. If you need to change the template, you can select a different template using the "page template" dropdown under the "page attributes" heading on the right of the screen.

Blocks

An introduction to blocks and the new content editor

If you had your website with us prior to 2019, it's likely that you'll have previously had an alternate admin area when editing pages. WordPress brought out a major update which included some quite significant changes. Adding content can now be done by adding a series of blocks. Blocks are different page elements that you can add to your page depending on the content that you would like to display.

There are lots of different blocks, categorised into the following: most used, common blocks, formatting, layout elements and embeds, and for example there are blocks for adding a heading, paragraph, file etc.

These blocks can be repositioned easily by using the arrows that show on the left hand side of a block when you hover over or select it. You can also click and hold onto the six small dots positioned between the up and down arrow, and drag the block around to change its position on the page.

Adding content - choosing a block

To start adding content to your page, you can start to type just below the title where it says "start writing or type / choose a block". If you start typing you will have a simple paragraph block in which you can add text. However if you type "/" or click the "+" icon, you will be presented with the menu to select a block.

More options

No matter which block you are using, you can always click the 3 dots on the right hand side of the block toolbar to reveal more options such as "duplicate", "insert before", "insert after" and "remove block".

In addition, on the left hand side of the toolbar at the top of the page are some permanent options, which are a "+" icon for adding a new block, "undo" and "redo" arrows, an "i" that will show you how your page is made up and finally a tool to quickly navigate the blocks on your page.

Classic block

The classic block gives you all the tools that you used to have in the old style editor, in almost the same layout. The only slight change is that the "add media" button is no longer labelled this, it's instead depicted by a camera and music symbol icon, and you'll find it in amongst the rest of the content editor tools, towards the right hand side.

Toolbar toggle - this option is the button on the far right of the toolbar, clicking this option reveals a second row of tools which are very useful.

Text style – there is a dropdown which by default says "paragraph". If you want to add a heading, use one of the preformatted heading styles from the dropdown list.

B – this allows you to put text in bold. Highlight the text you wish to be bold and click this button.

I – this allows you to put text in italics. Highlight the text you wish to be italic and click this button.

Lists – to create a list on your page you can select either bullet points or numbers. These are the buttons with tiny bullet points/numbers followed by a few small lines. Select one of these and begin typing. To do the next point on the list press enter and

a new bullet point/number will appear.

Text alignment – to change how your text is aligned, you have three options – left aligned, centralised or right aligned. The three buttons to control text alignment show a few lines of the aligned text that each button will create. To use these options, you can either select them before you begin typing or highlight the text you want to align and then select the relevant button.

U – this allows you to underline text. Highlight the text you wish to underline and then select this button.

Plain text – this is the button that looks like the letter T on a clipboard. When copy and pasting text from elsewhere it can sometimes contain formatting which affects the way the text will look on your webpage. Pressing the plain text button before pasting anything will ensure that all text you copy on to your website has consistent formatting. This should always be used when pasting text.

Inserting an image using the classic block

To insert a single image into a page you will need to click the "add media" button above the text editing box on a page. A box of files will appear with two tabs across the top. To upload a new image, you will need to select "upload files" from the top and press the "select files" button in the centre of the box. If you are adding an already uploaded image, search for it in the initial box of files which appeared. Once you have your image uploaded, select the image and press the blue "insert into page/post" button in the bottom right.

To change where on the page this image will appear in relation to the text, click the image and a bar which looks like this should appear:

The four boxes in this bar will change the alignment of the image. You can click these to decide which looks best. The "X" button will delete the image from the page. Selecting the little pencil icon allows you to make various changes such as giving the image a caption, changing the size and turning the image into a link. You can either choose to alter the image size here or manually by clicking the image and dragging the corners of the image to the desired size.

Adding video using the classic block

Videos can be added to the website in mp4 format. To upload your video, add it to the media library as you would an image and then click "insert into page".

Linking to documents using the classic block

To add a link to a document, you will need to upload the document to the media library in the same way you would an image. It is best to save the document as a pdf before doing this. To insert this file as a link, you can edit how the link will appear on the page by selecting the file in the Media Uploader and editing the "title" on the right hand side - whatever is in this box is how the link will show.

Adding text to a page - paragraph block

The paragraph block is the default block, and if you just start typing without selecting an alternative block or press enter in a different block, this is the block that you will be presented with. When using this block, along the top bar, you will find some basic options to change how the text appears. Below, we will cover the options you may need and what they do (from left to right across the toolbar).

Text alignment – to change how your text is aligned, you have three options – left aligned, centralised or right aligned. The three buttons to control text alignment show a few lines of the aligned text that each button will create. To use these options, you can either select them before you begin typing or highlight the text you want to align and then select the relevant button.

B – this allows you to put text in bold. Highlight the text you wish to be bold and click this button.

I – this allows you to put text in italics. Highlight the text you wish to be italic and click this button.

Links - within a page on your site you may want to link to either another website. To do this, you can type the text the way you would like it to appear on the page, for example "click here". When you have typed this, highlight the text and press the button in the editor bar which looks like this: 🔗 and then paste or type the website URL (ensuring the https:// is included) into the box which will appear. If you wish to make this link open in a new tab, click the 3 dots next to this box and turn on the option for "open in new tab". This is best practice for external links so that the

user still has your website open when they close the new tab.

Strikethrough – to add a strikethrough to your text, highlight it and click the icon that shows ABC with a line through it.

Paragraph block options – on the right hand side of the page, there are two tabs, "document" and "block". Under the block tab are other options for the block that you are using. For the paragraph block, there are text settings, colour settings and advanced.

Adding a page heading – heading block

The heading block allows you to add a heading to a page. Select the heading block, and then type your heading where it says "write heading…". Both on the right hand side and across the top toolbar are options for you to choose between different heading styles - H1, H2, H3, H4 etc. These are preset. Generally, you will want to use H2 or smaller, and as a general rule, the visual appearance of the heading will get smaller, so H3 is smaller than H2, and H4 is smaller than H3.

Adding columns to your page – column block

You can easily split the content on your pages into columns, to do this, use the column block. The block will add two columns as default, but if you select the block, you will see the option on the right hand side to choose how many columns you would like - a maximum of six. Within each column, you can add text by typing where it says "start writing or type / to choose a block" or you can add a different types of blocks within the column, including if you wish, splitting your column down into further columns.

Uploading an image – image block

Once you have selected the image block, you will be presented with a box displaying the buttons "upload" and "media library" and "insert from url". You can click the second option to choose images that you've already uploaded or to add new images, click the "upload" button, select your images and click "open", or drag and drop onto the box. Once your images are uploaded and selected click the "select" button. Once the image is displayed in the block, you can type a caption below it. On the right hand side are various options, the most useful are the size settings and also the "link to" option. Use the "link to" option if you would like to link the image to a website. To do this, in the dropdown select "custom url" and then fill in the URL in the "link url" field below.

In the toolbar across the top are options for the alignment of the image, selecting one of these will dictate how the image is aligned on the page. If you need to edit the image, ie. swap it for a different one; click on the "edit" icon that looks like a pencil.

Adding a gallery – gallery block

Once selected, you will be presented with a box displaying the buttons "upload" and "media library". You can click the second option to choose images that you've uploaded or to add new images, click the "upload" button, locate and select your images and click "open", or drag and drop onto the box. Once your images are uploaded and selected click the "create a new gallery button", followed by "insert gallery". Before inserting the gallery you can drag the images around to reorder them, click the "x" to remove an image, or type where it says "caption this image" to add an image caption.

On the right hand side under the "block" tab, there are various options for you to change - this includes how many columns the gallery has, whether the images are cropped, and whether the images link to anything.

In the toolbar across the top are icons for choosing the alignment of the gallery within the page and to edit the gallery, click the "edit" button that looks like a pencil.

Uploading a file – file block

You will use this block when you are uploading a document and want to display it as a link, download button or embedded document. Once you have selected the block, you will be presented with a box displaying the buttons "upload" and "media library". You can click the second option to choose documents that you've already uploaded or to add new documents, click the "upload" button, locate and select your documents and click "open", or drag and drop onto the box. Once your files are uploaded and selected click the "select" button.

Your block will now be displaying a text link to your document and next to it, there is probably a button that says "download". You can edit the file name text by typing over it, or choose to remove it altogether and just display the button. You can also change the button text from download to something of your choice just by typing over it.

On the right hand side of the page, under the "block" tab, there are settings which are quite important:

PDF settings - select "show inline embed" if you want to embed the document in the page, meaning that the PDF is open for the user to look at. (Your website may be using a plugin for this functionality instead, and if so, the instructions are covered later in this guide).

Link to - this should be left on "media file".

Open in new tab - it is good practice to select this option, the document text link will open it in a new tab.

Show download button - toggle this option to decide whether you would like to show the download button or not.

We recommend that documents are uploaded as PDFs where possible.

In the toolbar across the top are icons for choosing the alignment of the document within the page and to swap the document for a different one, click the "edit" button that looks like a pencil.

Embed block

The embed block is used for embedding videos and images etc. from external sources. When you have selected the block, you just need to paste the URL into the field you are shown and then click the "embed" button.

Video block

Use this block to upload a video to your blog. The video will need to be in mp4 format. There are various options on the right of the page, including "autoplay", "loop", "muted" and "playback controls".

Videos, especially if they are long, can result in very large file sizes. If this is the case or you are uploading lots of videos, our recommendation would be to upload the video to a 3rd party such as YouTube or Vimeo and embed the video from there - there are notes on how to do this further along in this guide. Uploading large files directly to your website could result in slowing your website down, and the videos can be slow to load.

List block

Use this block to add lists to your page. There are options to choose between a numbered or bulleted list and to indent or outdent your list item.

Table block

Use the table block to add a table to your page. Most of our websites used to have a table plugin added in addition, however we are now phasing this out, as this block offers a more simplified approach for adding a table. The other method of adding a table is still described in this guide. Once the table block is selected, you will be presented with a window to choose how many columns and rows you would like to start with, then press "create".

To fill your table with content, click into a cell and type in your content. At the top are tools for adding links, bold text etc, you can still do all of this within a table. On the right hand side, are options for styles - "regular" or "stripes".

Shortcode block

Certain plugins or website functionality use shortcodes to place an element within a page. If you need to add a shortcode, choose the shortcode block and then copy and paste your shortcode where the block says "write shortcode here". If your website is using the Tables plugin or you have Private Documents on your website, these both require the use of shortcodes.

Spacer block

The spacer block is used for adding space inbetween your blocks, and although you don't have to use it, it can neaten up a page, or make it easier for the user to look at. Select the spacer block and it will add a grey box within your page (it isn't grey on the website itself). You can either resize the height using your mouse to drag the lower box boundary up and down, or in the block settings on the right of the page, you can type in the height that you would like. 25px is usually a good size.

Custom HTML block

The custom HTML block allows you to add HTML to your page. HTML is a form of website code, and will most likely be used if you're trying to embed some form of widget from a 3rd party and they give you a code snippet to add to your website. If you're unsure, get in touch with us and we can advise. The block has a handy preview option so you can preview what you've added and ensure it looks as it should.

Button block

The button block allows you to add a button to your website page. Once you've selected the block, you are presented with a small box in which to paste or type in the

URL, or you can type to search for one of your website pages. Once you've added your link, press the arrow on the right hand side to apply the link. You can also type directly in the button to add the text that displays within your button.

On the right hand side of the page, are options for choosing the background colour of the button and the colour of the text. Under "styles" you can also choose whether your button is "rounded", "squared" or an "outline".

Other media - document lists, galleries and embedding a document without blocks

Please note: websites that are using blocks, will use blocks to add documents, embeds and galleries, and not the methods below. Therefore, if we covered blocks in your training session and not the methods below, you can ignore this section.

Document lists

If you are adding multiple documents and you would like to add them as a list, you are best adding them using the document list functionality, that you will find on the editing screen for any page. It is located below the content editor/blocks and is titled "documents". To add a document, click on "add row" then on the left hand side in the "document label" field, fill in the name of the document. On the right hand side click "add file", followed by "upload files" and "select files". Locate the document(s) on your computer and click "open" to upload the file. You can select and upload multiple documents at once.

Once the documents are uploaded, you can reorder them by dragging and dropping using the number on the left hand side. You can press "add row" and follow the process above at any point to add a new document, or use the "+" button that appears on the right of each row to add a new row in that location , or use the "-" button to remove a row. To keep a row, but replace the document, hover over the file, click the "x" and then use "add file" to upload the new document.

Creating a gallery

When editing/creating a page, you may wish to add a gallery of images. To do this, you can scroll to the bottom of the editing page and you should see a blue button titled "add gallery". Clicking this adds a new section which has three boxes – gallery title, gallery text and gallery area. There is no need to use all these boxes – for example,

if you leave the title and text blank this is fine, the images will display directly under the other information on the page. If you do wish to add a description, the editing capabilities in the text box are the same as the main body of the page.

To add the images, click "add image" at the bottom of the gallery area. This will open the Media Library. Any images you select will then display in the gallery area. It is possible to add multiple sets of images by clicking "add gallery" under the existing gallery(s). You can remove an image with the "x" or an entire gallery with the "-" icon.

Embedding documents

In addition to adding a document to your website as a link, it's possible to embed a document (it must be a PDF) that is viewable on the page without having to click a link. Although this method isn't always suitable, especially not for displaying lots of documents this way on a page, it can have its uses - for example for displaying the latest newsletter and having the rest as links below.

If your website is set up with embedded documents, then the default action when you upload a PDF and insert it in a classic block ("add media" > "insert into page") is that it will automatically embed. An embedded document will look something like this in the content editor [pdf-embedder url="https://yourwebsite.co.uk/wp-content/uploads/2019/03/Test.pdf"]

Organising the website menu

The menu controls what appears in the drop down menu on your website. For example, you may have the heading "key information" in your menu and wish to have many other pages under this heading. Adding a page to your menu is the second step that completes the process for adding a new page to your website.

To edit the menu, click "menu" down the left hand side of the dashboard

Adding a page to the menu

In the box at the left titled "pages", select "view all". Here you will find a list of all pages you have published to your website, or under "most recent" you should find any newly created pages. When you find the page you need, click the tick box to the side of it and select "add to menu". This will place the page at the bottom of the list on the right of the page which appears under "menu structure" - you will probably need to scroll down to see it.

You can drag and drop this page to the position you want it to appear. Using the example above, if you were looking to add something under Key Information, you would drag the new page up the list and place it under the Key Information heading. The page will need to be indented under the heading like the upcoming image, to ensure it is below the heading on the website. Click the "save menu" button.

Positioning a page in the menu - if using a mega menu

If your website uses a mega menu - meaning that the menu dropdowns display in multiple columns, the process of ordering your menu, may differ from the above. If your website is using the mega menu, when you hover over one of the main menu headings, a blue box will appear, that says "mega menu". Click on this, and it will display your menu in columns, as it is organised on the website itself.

You can drag the menu items around to reorder them. In the top right, you can also use the dropdown select to choose the number of columns that the menu is split into.

Mega menu - disable a link

On the left, you can click on "settings" - in here, you won't need to use many of the options very often, however, if there is a menu item that you just want to act as a heading for the dropdown items below but you don't want it to be a clickable link, you can select "disable link". Then click the blue "save changes" button below.

Deleting a page from the menu

If you wish to remove a page from the drop down menus, find the page in the "menu structure" list and click the downwards pointing arrow next to the page name. Press "remove" and this page will be removed from the menu, however you won't have deleted the page entirely – you can still add it back at a later date if you wish.

Bulk delete pages from the menu

If you want to remove multiple pages from the menu at once, you can use the "bulk select" option at the bottom of the menu. Select this, and then tick the tickboxes next to all of the menu items that you would like to remove. Then go back to the bottom and click on "remove selected items". Click the "save menu" button when you have finished making your changes.

Renaming pages in the menu

To change how a page appears in the menu, the process is similar to above. If you press the little downward arrow next to the page name, there is a text box named "navigation label" – change this text to the text you wish to appear. This will not change the name of the page when you view it, it will only change how the name appears in the menu.

Linking to another website from the menu

You can add a link to another website in the drop down menu, you can do this from the Menu page. In the boxes down the left of the page you will find the option "custom links". Click that and paste the link to the page into the "url" box, then put how you want this to appear in the menu in the "link text" box. Once you've done this, press "add to menu" and follow the same process as before for placing this where you'd like it to appear.

Making an external menu link open in a new tab

When you add an external link to your website menu, this link should open in a new tab. You may need to enable this option first, as it is not there by default.

Scroll to the very top of the admin area and click on "screen options" on the right hand side. Tick the tickbox next to "link target". You shouldn't need to repeat this step once you've done it the first time.

Then, click the small right downward arrow in the box of your menu item. Tick the "open link in a new tab" option. Click the "save menu" button to save your changes.

Posts

Posts are used for the news or blog sections of your website, they may also be used for areas such as class news. They are automatically listed in date order and can be tagged and categorised depending on where on the site you would like them to appear.

Adding a new post

To add a new post, select "posts" from the menu down the left side of the dashboard. At the top you will see the option to "add new" and will need to select this. Filling in the content of a post is much like adding content to a new page and uses blocks in the same way. To ensure the post appears in the correct area you will need to select the a category from the "categories" box on the right hand side of the editing page. Once

you have selected the correct category you can press the blue "publish" button and your post will be added.

Editing a post

To edit a post, you can select the title of the post from the post list and make the changes you wish to make. This is also much like editing a page.

News posts with feature images

On some websites, the homepage requires an image alongside each news post. If you wish to post a news item that doesn't have an image, we recommend uploading an image of your logo to be displayed instead. If there is a crop button, you should use this to ensure your image is correctly sized.

Comments

Usually, users who visit the news or blog section of your website are able to post comments in response. This can be completely disabled to ensure no comments are received, if you would prefer. If you do allow comments, they can be moderated before being made public on the site. This is covered below.

Moderation

When a comment is received to be moderated, the email address set up as "administrator" on the website will receive an email notification. This email setting is on the "settings" > "general" page. The "comments" heading in the left hand bar of the dashboard will also get a number next to it in an orange coloured circle with the amount of comments awaiting moderation. To view the comments click on "comments" and they will be shown in a list.

All comments will be displayed in date order, with the most recent being at the top. Any which are awaiting moderation will be highlighted in red.

When you hover over the comment text for each comment you will see the following options appear "approve | reply | quick edit | edit | spam | bin". Choose which action you would like to take and click on the corresponding option.

Spam

You may sometimes receive spam comments on your website - an occasional one of these is quite normal. We do have plugins in place to stop a large amount of spam

being received and we usually find that these plugins do their job well. If you do start to receive an unusual amount of spam comments, please let us know.

Settings

It is important that your website has the correct settings enabled so that all comments posted on your website have to be approved before being published. The comment settings can be found by hovering over "settings" on the left of page. We will put your website live with these settings in place, but the correct options are as follows:

Before a comment appears:

Comment must be manually approved – ticked

Comment author must have a previously approved comment - not ticked

You shouldn't ever have a need to change anything else in the settings area as these have already been set up to ensure your site is working correctly.

Slider

The slider on the Home page of the website can usually be edited by clicking "edit page" on the homepage of the site. To add a new picture, click the blue button which says "add slide" below the existing images. When you click this, you will be prompted to add a new picture and taken to the media library. If you try to upload a image that isn't big enough, a warning box will display when you add the image telling you what size the image needs to be. Additionally, once an image is added, you may be given a crop option - please do use this button, as otherwise, your image won't be resized correctly, which can have a detrimental effect on the layout of your website. It will also allow you to check that the image you've chosen is suitable for the slider and choose which part of the image you'd like to display. Generally, slider images need to be landscape rather than portrait to fit correctly and look good on your website.

If your slider has accompanying text, you will be able to edit it here along with the images.

To remove an image from the slider, hover over the image in the editing page and you will see an "x" in the right hand corner of the image. Click this and the image will be removed – giving you the option to replace it with something different. If you wish to remove this row entirely, when hovering over the image, you will see a "-" sign in the margin to the right. Click this and the row will be removed.

If you can't find your slider on the homepage edit screen, it most likely has its own tab on the left of the dashboard, or can be found under "options" from the left hand bar.

Depending on your website, each page might its own slider on every page, which will work the same as the homepage slider described above.

If your website has a carousel slider, this will be editable from the homepage or from the "options" page on the left of the dashboard.

Calendar/Events

To update your calendar you will need to select the "events" option from the left side options on the dashboard. In some cases, this will appear as "calendar" and the process will be different – we'll cover this afterwards. Once you've selected "events", select "add new" from the top of the page. On this page you will need to give your event a title – this is how it will appear in the calendar. In the text box underneath you can go into more detail about the event. Under "time and date" you will need to ensure that you select the start and end dates for the event – if it is only on one day just select that date for both options. You can also either insert the start and end times of the event or select "all day event".

There are lots more available options below, which you can fill in if you wish.

If your website shows the "calendar" option in the sidebar, clicking this will open an interactive calender which allows you to move between months. To add an event to a date, click the correct date and a box will appear. The first row of options in this section allow you to select the start/end dates and times for the event. If your event spans multiple days, just select the start and end date here and it will automatically cover all dates inbetween. If the event is one day only, put this date in both the start and end. If the event spans one full day, click the "all day" tickbox on the left.
The "repeats" option is for events that occur regularly and on the same day/time each time. For example, if you have an event at 10:30am every other Friday, you could select "every 2" and then when the next options appear, select "weeks".
The title of the event is the information which will display on the calender before being clicked. It's best to use this to display a short summary of the event eg. "Meeting for year 6 parents". Other details such as location, parking arrangements, items which need to be brought etc. can be added in the fields below.

Once you have filled out this box, click the blue "add" button and the event will be added to the calender.

Announcements/Ticker

The way news tickers (bar with scrolling text) on the homepage are managed varies between websites. Often, this is managed by using an option in the sidebar named "ticker" "announcements" or "ditty". If you use this method, when you click into it you will be shown a list which should currently just have one item in it. To edit the ticker or add additional messages, click "edit". Once you are on the next page, each message that appears in your ticker is shown in a green box on the right hand side.

To remove a message, click the bin icon which appears in this bar.

To edit a message, click the pencil in a box icon that says "edit item" when you hover over it. Change the text in the box titled "content". You can make the text a link by pasting a link into the field below labelled "link".

If you wish to add an additional message, click the "add item" button. This will add an new box for you to edit as above.

To reorder the messages, you can drag them around by holding down the icon on the right that consists of 3 lines.

Once you're finished, click the "save ditty" button on this page and the new message should now show in your ticker.

Some websites require you to click "edit" on the homepage to update the announcement text. If this applies to you, you will see the heading "ticker", or something similar, when you go to edit the homepage. Existing messages will be displayed and can be edited by changing the text in the "ticker text" box. If you wish for people to be able to click the ticker and be taken to another page / website, you can add the URL for that in the box to the right of the text (If your website has this option). To add or remove a message, hover over one of the existing ones. The "+" in the right hand column will add a new box for a message. The "−" in the right hand column will remove whichever message it appears next to. If you wish to reorder the messages, do this by dragging the message by the number in the left hand column.

If your ticker displays on every page of the website rather than just the homepage, the area to edit this will be in the "options" section. Despite being in a different location, the method of editing this is the same as the above.

Logo Grid Template

This is a template option that's available on all of our latest websites as standard and is a template that would be useful for pages such as learning resources, where you might want to display a series of logos/pictures in a neat grid, where each logo links to another website.

To use this template, create a new page or edit an existing page and under "template" on the right hand side, select "logo grid".

A section titled "logo with link" will now appear and to start adding them, just click the "add logo" button.

Three fields will then appear, click the "add image" button to add the logo/icon/ picture, type the "name" in the next field, and add the "URL" in the last field. Keep clicking the "add logo" button to add further logos.

You can reorder them by holding down your cursor in the number on the left of each logo section.

To remove a logo entirely, if you hover over right hand side of the section, you will see a "-" icon that you can click to delete it.

Accordion Template

This is another template that is available as standard on our latest websites and is useful on pages where there is lots of text to display, that might be split up by a series of headings or questions. The accordion will display the questions/headings, and once clicked will open up to display the text for that section.

To use this template, create a new page or edit an existing page and under "template" on the right hand side, select "accordion".

A section titled "accordion" will now appear and to start adding them, just click the "add row" button.

Each row requires you to fill in a "title" on the left, and "text" on the right. You can add additional ones by clicking the "add row" button.

You can reorder them by holding down your cursor in the number on the left of each logo section.

To remove a row, if you hover over right hand side of the row, you will see a "-" icon that you can click to delete it.

Tables

To add a table to a page on your website, you will first need to create the table. To do this, select the "tables" or "tablepress" option from the left side of the dashboard, then select "add new". Here you have the option to name your table – it is best to name the table something relevant as this helps if you need to find it again at a later date. You will also need to select how many rows and columns your table needs (you will be able to change this later) using the two little boxes at the bottom of this page. Once this information is correct, click the blue "add table" button.

On this screen you will find the table under the heading "table content". Fill the table cells with the information you wish to appear in your table. If you wish to combine cells in a row, put the text in the most left box of the cells you are combining, select the "combine cells: "in a row (colspan)"" button and then click into the cells you wish to combine with the original one. This will add text into the box but this won't display in the published table. To combine cells in a column, add the text to the top cell of the ones you wish to combine and then follow the above process but using the "in a column (rowspan)" button.

If you need to add another row or column to your table at any point, you can do this by using the "add [number]" option under the table.

Once you are happy with the layout of your table, scroll to the bottom of the page and press the blue "save changes" button. Your table is now saved. To insert this table into a page, scroll back to the top and copy the text in the box next to "shortcode". You can now leave this page and go to the page you wish to insert the table into. Paste the code you copied into this page and update the page. When you preview, the table should now be showing.

Options page

The options page allows you to make changes to various areas of the site. This could be areas on the front page or the sidebars, or details that appear all over your website. Your contact details could be in here – meaning if something such as the phone number changes, this is the area you would edit that. The information which can be edited in this area varies between websites, so it is always worth checking this page to see what your options are.

If your website is set up to have a default or fall back images, you will find them here.

Adding users

To add new users, go to "users" down the left hand side of the page. At the top of the page you'll see the "add new" button. When you click this, you'll be taken to a form to fill in the details of the new user. The username is the name they'll use when logging into the site. The role you select on this page will determine what the user can access and edit. "school" is usually the option required for school staff. So long as you have ticked the "send the new user an email about their account" options, the user will be sent an email to set their password and login. Alternatively you can manually set the password and pass it on, but advise the user to change their password at 1st login.

Private documents

If you have an area on your website for password protected documents, you will have the "private documents" page on your website admin area.

Creating a document set

Documents are organised into sets, in this set you may have one or multiple documents. To create a set, under the "create a document set" heading, enter the name, for example "Governing Body Meeting 201017" and then click the green "save" button. It's a good idea for this name to be quite descriptive so that you can easily find the document set. This is also what will display on your website when users view the documents. After clicking save, your new document set will display in the "existing sets" list below.

Renaming a document set

You can rename a document set at any time by editing the set name, click on the name and start typing. After doing this, click the green "save" button.

User access for a document set

Under the user access heading, you can choose which users on the website can access the documents on the front end of the website, by choosing the relevant roles. Click on the "select some roles" label and a list of roles will appear for you to select from. If you're not sure which roles need to be selected, please let us know. Please note that you may not have all of the roles in the list set up on your website.

Deleting a document set

To remove a document set, click on the circular red delete button, located next to the document set. You will be presented with a message to confirm that you would like to do this, you can choose to "delete" or "close" if you've changed your mind.

Adding documents to a set

To add documents to the document set, click on the blue "show files" button. Then click on the grey "choose files" button and locate the documents that you would like to upload, then click open. The document should be a PDF or Word Doc - these are the only accepted file types. Then click the green "upload" button. The uploaded documents will then display in a list below.

If you try to upload a document that has already been uploaded you will be presented with a message that says the file name already exists. You need to remove the existing document or rename the document you're uploading.

Once you have finished editing a document set, click on the blue "hide files" button to return to just the set list view.

Deleting a document

To remove a document from a document set, click on the circular red delete button, this has a bin icon. You will be presented with a message to confirm that you would like to do this, you can choose to "delete" or "close" if you've changed your mind.

Renaming a document

You can rename a document at any time by editing the title, click on the name and start typing. After making a change, you will need to press the green "save" button.

Reordering documents in a set

If you have more than one document in a set, you can choose the order in which they

will display on your website. To the right hand side of the documents, there will be upwards/downwards arrows to move the documents up or down the list. Once you have made changes to the document order, click the green "save order" button.

Placing a document set in a page

To display a document set on a page, copy the shortcode (eg. [private_documents id="100"]) for the set, ensuring you also copy the square brackets, and paste it into where you would like it display on your website page, using the normal content editor. Each document set has a unique shortcode, which is displayed in the document set list.

This will then display a button on your website page, that when clicked displays a modal containing a list of all of your documents in that set. You can click the individual links to download a document, or there is a button at the top to download the entire set of documents.