



*iknowwebdesign.com*

Revision date: 12/21/2009

Managing your content with the iKnow installation of WordPress v. 2.8 and later

---

Adding, editing, and updating the content on your Web site is done from within the iKnow/WordPress content management system. Once you get started, you should find it a fairly easy experience. This step-by-step guide will get you started.

### Log in

You must be logged in to the back end of your site to make changes. MAC USERS may need to use Firefox for their edits--we have found that some versions of Safari may not properly present the text editing screen. WINDOWS users may use Internet Explorer or Firefox for editing.

To log in, go to:

yoursite.com/wp-admin: \_\_\_\_\_/wp-admin

username: \_\_\_\_\_ password: \_\_\_\_\_

Type your username and password in the form and click "login."

### Welcome Screen and Dashboard

Logging in will bring you to the "Dashboard" screen. Beneath the title of your site, you will see a number of menu choices, including: "Posts" and "Pages." If you have photo or image galleries, you will also see menu choice for "Gallery." Most of your content management activity will take place in the "Posts", "Pages", and "Gallery" sections.

**Note:** Some sites are configured to have posts that are specialized for a certain function. These will also be listed under the dashboard. Examples of specialized

posts include: “sidebars”, “testimonials”, “bios”, “products”, “projects”, “events”.

The other section you may should visit at some point is the “Profile” section, where you can change your login password if you choose. If you do change your password, it is important that you use a strong one for security reasons.

## Writing

From the menu at the left side of the dashboard screen, choose “Posts.” You will then have the ability to write a new post or edit an existing post. Posts are the fundamental elements of the WordPress content management system. Depending on the specifics of your site, a post may be a project, a detail page for an item, a written article, or a blog entry. Once saved and published, the information you add to your post is formatted according to the rules we have developed for your site. When it is published, your post can be seen by your viewers.

## Writing a Post

- a. Choose “Posts >> Add New” from the submenu.
- b. Write a title for your post in the blank title box at the top.
- c. You can start creating your post directly in the editing window. You can use the tools in the toolbar to make your text bold, italics, etc. If you need a heading for a section of your post, type your heading, select it, and choose the appropriate heading size/style from the “format” menu. Example headings are “H1 Heading (top level heading), H2 Heading (next size smaller heading), and so on. If we have defined specific text styles for your site, you can apply the style by selecting the desired text (a special heading, for example) and choosing the appropriate style from the “style” drop-down menu in the toolbar.
- d. Make a mistake? On the toolbar, you will see a backward-pointing curvy arrow--this is the “undo” button.
- e. You should save your work during the process by clicking “Save Draft.”

## Publishing a Post

In the column to the right of your post editing window is a list of “Categories.” Put a check in the checkbox next to the category in which you would like your post to appear. You can select multiple categories if you wish. If your site uses a column sidebar, you will need to click the category “sidebar” to make the post appear in the correct place on the page.

To publish your post so it can be seen on the Web, click the “Publish” button in the upper right-hand corner. That’s it!

## Editing a Post

If you need to make changes to a post, choose “Posts>>>Edit” from the menu. Select the post you would like to edit from the list, and click “Edit.” This will bring up the editing window where you can make changes to your post.

### Unpublishing a Post

If you need to unpublish a post, choose “Post >> Edit” from the menu. Select the post you would like to unpublish from the list, and click “Edit” or “Quick Edit.” This will bring up the editing window. To the right of the post is a box labeled “Publish.” You can change the status of the post by clicking “edit” next to its status. From the drop-down menu, choose “unpublished” to unpublish the post. Click “OK.” Then click “Update Post”.

### Editing a Page

Editing a page is done exactly as you would edit a post. You can unpublish pages as well (see above). Unpublishing a page will usually remove the navigation link to that page.

### Adding Images to Your Posts

Let’s add a picture to your post. If you chose a template with placeholders for images, click on one of the placeholders to select it. While it’s selected, click on the “insert image” icon in the toolbar (a mountain with sun). A window titled “Image Properties” will appear. Click the “Browse Server” button. This will bring you to the Resources Browser screen where you will manage your pictures and other media resources for your site.

1. IF you **DO** see the filename of the image you want to use in your post, click on it. If you can see the filename, it means you have already uploaded the image to the server and it is ready to be used.
2. IF you **DO NOT** see the filename of the image you want to use, either in the main directory or any of the subfolders, you need to upload the image file to the server. To upload an image file you have on your computer, click on the “Browse” button at the bottom of the window. This brings up a window that allows you to find the image file on your computer. When you have located your image, click the “Open” button to select it. This enters the location of your image file in the field at the bottom of the Resources Browser window. Click the “Upload” button at the bottom right of the window to upload your image to the server. You will now see the name of your image file in the list of files above. Click on the image’s filename to use it in your post.
3. **SUGGESTION:** You can organize your images by creating new folders and uploading your pictures into the appropriate folders. This makes it easier to

manage and locate your resources as your site gets larger. Also, you should have scaled your image to an appropriate size and given it a descriptive file name before uploading.

4. Back in the “Image Properties” window, you will see a preview of your picture. The dimensions (in pixels) of the picture will appear in the “Width” and “Height” fields. If your picture is larger than you would like it to be, you should enter the new width or height (in pixels) in the appropriate field. The aspect ratio of the image is locked, so the other field (width or height) will change automatically. It is good practice to enter a description of your picture in the “Alternative Text” field. Now click “OK” to add the picture to your post.

5. If we have specified styles for your images (such as borders, place at left, place at right, or caption), these styles will be available from the “Style” drop-down menu in the toolbar. To apply a style, select the image in the editing window, then choose a style from the “style” menu. If we have specified a “caption” style for your site, there are 2 steps to make it appear. First, you need to enter the caption in the “Alternative Text” field (see #4 above). Then, from the post or page editing window, you need to choose “caption” from the “Style” drop-down menu.

### **Linking from an Image Thumbnail to a Large Image**

If you have a large or detail version of an image that you want your viewers to be able to see, you will need to create a link to the detail image. First, select the image in the post. Then click on the “link” button in the toolbar (chain). This brings up the “Link” window. Click “Browse Server” to once again navigate to your image file. In the Resources Browser window, choose “image” from the “Resource Type” drop-down menu. This will show you the images available on the server. Click on the image you want, then click “OK” in the Link window. Your image is now linked to the image in your post. Save your work.

### **Making Text Links to Pages on Another Site (External Links)**

Making a link within your post is easy! Besides linking to full-size images (see instructions above), you can make links to other pages on your site or links to pages on external sites. To make an external link, first select the text (or image) you want your users to be able to click on. Then select the link tool in the toolbar (chain icon). This will bring up the “Link” window. The “protocol” field should be pre-filled with the following : “http://”. This indicates you are making a link to a site other than your own. The next step is to enter or paste the address (URL) of the page you want to link to into the “URL” field. Click “OK” to finish the link. Save your post.

### **Making Text Links to Other Pages or Posts on Your Site (Internal Links)**

Making an internal link is a slightly different process than making an external link. First select the text (or image) you want your users to be able to click on. Then select the link tool in the toolbar (chain icon). This will bring up the “Link” window. The “protocol” field should be pre-filled with the following : “http://”. To make an internal link, you must set the “protocol” field to “<other>”. Then enter or paste the page title portion of the “permalink” of the page you want to link to into the “URL” field. The “permalink” of any page or post can be found on the editing screen just underneath the “Title” box.

**Example:** if your permalink is : <http://www.yoursite.com/about-me/>

The page title you need to enter in the URL field is “about-me”.

Note that there are no spaces or punctuation in page titles, and words are separated by dashes.

Click “OK” to finish the link. Save your post.

### **Making a link to a File (.PDF, .doc, etc.)**

To link to a file that will be hosted on your site, first select the text (or image) you want your users to be able to click on. Then select the link tool in the toolbar (chain icon). This will bring up the “Link” window. The “protocol” field should be pre-filled with the following : “http://”. Click “Browse Server”. In the Resources Browser window, choose “file” from the “Resource Type” drop-down menu.

IF you **DO NOT** see the file you want to use, either in the main directory or any of the subfolders, you need to upload the file to the server. To upload a file you have on your computer, click on the “Browse” button at the bottom of the window. This brings up another window that allows you to locate the file on your computer. When you have located your file, click the “Open” button to select it. This enters the location of your image file in the field at the bottom of the Resources Browser window. Click the “Upload” button at the bottom right of the window to upload your file to the server. You will now see the name of your file in the list of files above.

Click on the appropriate filename to select the file, then click “OK” in the Link window. Your file is now linked to the text or image in your post. Save your work.  
**NOTE:** Any files you upload to your site this way must be less than 2MB in size.

### **Breaking a link**

To break any link, select the linked text or image in the editing window, then click on the “unlink” button in the toolbar (right next to the link button).

## **Editing a Page**

Pages on your site are places where one or more posts can be presented, or they can have their own content. Pages are usually accessible from the site's main navigation. You can edit the content on a page just the same as you would a post. From the Dashboard, go to "Pages" and edit text and images in the editing window. Save your edits.

## **Pasting Text from Word or Other Sources**

Word processing programs and text from Web sites often contain formatting characters that may look ugly and behave strangely if you paste them directly into a post or a page. The best way to handle this is to copy the text you want to insert, then click on the "plain text" clipboard icon in the toolbar labeled with the letter "T". Paste your text into this box and click "OK". This will remove the extra formatting characters from your text. If you are using Firefox, you will have the added benefit of Firefox's built-in spell checker.

## **Advanced Functionality: Image galleries, events pages, etc.**

### **Events Pages**

If your site has a page where you display calendar-based events, each event will be created as a separate post. The posts can contain images and text, similar to any other post you would make on your site.

In order to make your new event appear on your "events" page, you will need to select the category "events" and publish your post. If your site uses an events calendar to list your events in chronological order, there is one additional step to take before you can select "events" as a category. Toward the bottom of the post writing/editing page, you will see a box labeled "Event Editor." Click on the (+) if you need to expand the window. Here you can use a graphical editor to select the date and time your event will start, and also the duration of the event. You may want to experiment with the settings in order to determine what will work best for your site.

### **Image Gallery Pages**

This section describes how to manage image galleries and slideshows created with the NextGEN Gallery. From the dashboard, you will see a "Gallery" option under the "Posts" and "Pages" tabs if you have image galleries installed on your site. When you click on "Gallery", a submenu will appear underneath. Choose "Manage Gallery" from the submenu to view your galleries. Choose a gallery to edit.

## Editing an Image Gallery

Selecting a gallery to edit will bring you to a screen showing thumbnails of all images in the gallery. Here are some things you can do on this screen:

To delete an image from the gallery, check the checkbox next to the image ID, then go to the drop-down menu (top left) and select “Delete images”. Click “OK” to delete the image. You can select multiple images for deletion at the same time.

To exclude an image from the gallery WITHOUT deleting it (maybe you want to use it seasonally, for instance), just check the checkbox in the “exclude” column for the appropriate images. Then click “Save Changes” to update the gallery.

To change the order in which your images are displayed on the page, choose “Sort gallery”. This brings up a screen that allows you to drag-and-drop thumbnail images. An I-bar will indicate where you can drop an image. Be sure to click “Update Sort Order” to save your changes.

## Adding Images to an Image Gallery

From the “Gallery” submenu, choose “Add Gallery/Images”, then choose “Upload Images”. Choose “Browse” and locate the file on your computer. Now choose the gallery you want to upload your image to. Click “Upload Images” to finish the upload. Note: you can choose multiple files and upload them all at once. Click on “Manage Gallery” to see the results of your upload.

A few hints for working with images on the Web:

- Give your image a more descriptive name than DSCN0374.jpg. You will appreciate this later.
- It is good practice not to use spaces in filenames. Use the \_ or - instead.
- Your image should be resized, if necessary, and compressed before uploading to your site. If it is larger than 640 x 480 pixels, it is probably too large.

## Sidebar Location

If your site has a multiple-column layout, you may have the ability to display posts in a sidebar on pages of your choice. If you see a tab on your editing/writing page called “Sidebar Location”, open this tab. To show this post in the sidebar of a page, write the “permalink” of the page you want the post to appear on in the appropriate box. Some sites may have a choice of right sidebar or left sidebar. Don’t forget to save.

## Alternate Link for Posts

If your site has the “Alternate Link” plug-in installed, you can choose have your post title link to something other than the full post itself. This is particularly useful with sidebar posts used as announcements or teasers in which you want to control the excerpt and link to a completely different post or page on your site. To make an alternate link, type the “permalink” of the post or page you want to link to in the “Alternate Link” box. Save.

### **Alternate Page Title**

If you have the “Page Lists Plus” plugin installed, you will be able to give your page a different title (the main heading, frequently at the top of the page), than what appears in your page navigation. This is useful if you want to keep your navigation titles short, but use a more descriptive title on your page. Use the title field of your page for the heading you want to see on your page. Below the editing window, you will see the “Page Lists Plus” box (it may need to be expanded to view the contents). Enter the words you want to see in your navigation in the “Alternative Link Text” box. Save your work.

### **Blogs**

Generally, a blog is a collection of posts displayed on a blog PAGE. In most cases, you will have to select “blog” as a category for your post in order for it to appear on the blog page.

## E-mail

### Checking your email via webmail

If you are using our managed hosting plan, this is how to **check your webmail**:

In your web browser, type the following in the address bar (not the search bar):

yoursite.com/webmail

You will be prompted to enter your username and password:

username: \_\_\_\_\_

password: \_\_\_\_\_

We are using an application called RoundCube for webmail, which is a mail program which we have found to be easy to configure and use.

### Checking your email with an email client program

If you wish to configure an email client (such as Outlook, Outlook Express, Apple Mail) to check your email, here are the settings you will need to enter into the mail client application:

1. Mail account type: POP
2. Username and password as above
3. Incoming mail server: mail.yourdomain.com
4. Outgoing mail server: mail.yourdomain.com
5. **IMPORTANT!** There should be checkboxes or options for user authentication. You will need to select “yes” or “authenticate” for BOTH incoming and outgoing mail.

\* Step-by-step instructions for configuring common email client programs can be found on the inkfist.com wiki. Click the appropriate link on the webmail login screen.

Here is a link for configuring Microsoft Outlook:  
[http://products.secureserver.net/email/email\\_outlook.htm](http://products.secureserver.net/email/email_outlook.htm)

Here is a link for configuring Outlook Express:  
<http://www.microsoft.com/windows/ie/ie6/using/howto/oe/setup.msp>

## Mail Tools

Our **Mail Tools** application allows you to manage many aspects of your own email account.

Using Mail Tools, you can:

- change your account password
- add an autoresponder
- forward your email to another email address

To access Mail Tools, go to the following address:

[yoursite.com/webmail](http://yoursite.com/webmail)

Then click the [Mail Tools](#) link. This will take you to the Mail Tools login screen. Use your email username and password to log in.