

Configuration Guide

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Configuration Guide

This Guide

This guide introduces you to your Blog, and explains how to customise its appearance and start to use it.

Your Blog has been established with a default setup which is designed for a straightforward, single user Blog, that allows subscribers to subscribe to notifications of new Posts. Most of the default setup can be accepted as it is, though some additional personalisation will be necessary, and it will be helpful to understand some of the options available.

Some Blog owners may want to introduce multiple users and collaborators which may influence some settings choices.

Introduction to Your Blog

You can use your Blog to generate, share and preserve information you collect from your family history research or as part of your role with the Guild. You do this by creating Blog Posts, which you can think of as articles in a newspaper, newer articles are added on top of older ones. In addition, you can create static pages with information that you want to be easily found. An example might be an About page telling people more about you and the background to your research.

Logging In & Accessing the Dashboard and Customisation Panel

Before you can customise your blog, you will need to log in. In the address bar of your browser, type `https://XXXXXXX.one-name.blog/wp/wp-admin` (where XXXXXXXX is the name of your blog. Enter the username and password you have been given. This will take you to the Administrators Dashboard.

Your Blog is controlled from this Dashboard. It includes a panel, in black, down the left hand side of the screen, which contains a menu of various functions. Selecting functions may lead to sub menus. Navigation to particular Dashboard functions will be described as '*Dashboard menu item – submenu item*'.

There is also a menu at the top of the screen which includes the name of your Blog. This has a submenu item which allows you to visit the Blog, and then return, either to the Dashboard, or to a couple of other Dashboard menu items.

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Posts

Your Blog has been set up so Posts appear on your Home page with the most recent first and older Posts below it. As you add a new Post, the others will move down the page, although you can select to stick a particular Post to the top of the page.

A sample Welcome Post has been added to your Blog, and made 'sticky' so it always remains in view as the first Post. It is also expanded so the whole post is shown, rather than the first few lines, which is the default. See **Posts** under **Examples of Use**, and the section on **Excerpt**, for more on how to control how your Post appears.

It is up to you whether you keep the Welcome Post sticky, but it is important to remember this is the first thing a visitor to your site will see.

During customisation you will have the option to use a different Page for your Posts and make the Home Page as a Static Page, which could include the text of your Welcome.

You can use your Posts to share stories and photographs, ask questions, make announcements, or simply record useful information. They can contain images and links to files and other web pages. Subscribers to your blog will be notified when you produce a new Post. You can also link to the Posts from an email list or Facebook group.

Pages

Pages are used to present more static information, such as your biography, a summary of your study, or details of how to contact you. They are not replaced or moved when you add a new Post. Normally, there will be a link to any static Pages in your Menu.

The creation of Posts and Pages are very similar processes. The difference is in how they are accessed. When you create and publish a Post, it will appear automatically on your Home page, whereas any Pages you create are accessed from the Menu Bar and you will need to set this up.

Your Blog has been set up with some sample Pages to demonstrate their use. Some of these are templates for Pages you may need, but others, including the text of this Configuration Guide, can be discarded when you have finished with them.

The **Examples of Use** section has more details on creating Posts and Pages.

Comments and Share Buttons: Visitors can Comment on your Posts and Pages and use the social media buttons to share them. You can disable or

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time limit this facility down to the individual Post or Page, if you wish, using functions available when creating the Post or Page.

Media Library

Your blog has a Media Library, which is a repository for images and files that you can include or link to in your Posts and Pages. It has simple facilities for uploading new files and carrying out basic editing of images. Some images have been provided to support the initial customisation, and to demonstrate how they can be used in Posts and Pages.

You access the Media Library from the *Dashboard Media - Library*. It currently contains several images and a PDF file containing a copy of this guide. Two of the images are the Guild banner and button, used to advertise the site as hosted by the Guild. These must be retained.

You will also see images that can be used for your Header Image which appears in the site banner. You can delete this image when you have provided your own header Image.

New images can be uploaded from your computer by selecting **Add New**. This will allow you to identify images in your computer files for uploading.

Customising Your Blog

This section covers the basic customisation and personalisation of your Blog. There are some steps you will be expected to carry out, but most will be optional, with viable choices already made. For example you will need to change the header image, text and colours, unless you have a Guild Postholder's blog, where some settings must be preserved so your blog retains a standard look.

The following five sections describe how your blog is set up, and the more advanced customisation options that you may wish to consider. These sections are:

- Theme and Wordpress
- Widgets and Sidebar
- Plugins
- Subscriber Management
- Examples of Use

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Theme and Wordpress

Site Theme

The Theme adopted for your blog is Nisarg. This has been chosen as it is simple to customise and is a responsive theme that can be viewed on many different devices – desktop computers, laptops, tablets, and phones. There are other themes that can be installed but these instructions cover customising Nisarg.

You can access the Theme's settings from the **Dashboard** using *Dashboard Appearance - Customise*. The settings menu includes the following.

Site Identity: this allows you to set the **Site Title** and a **Tagline**. This is the text that appears over the image at the top of your blog. The tagline is optional. Type in the text that you want to display and select **Publish** to save it to your blog. Changes you make to the settings are not saved until they have been published.

You can also set a **Site Icon**: This is a symbol that will appear in browser tabs, bookmark bars, and within the WordPress mobile apps. It has not been set. The **Select Site Icon** button will allow you to select a site icon from the images in the Media Library. Before you can perform this step you will need to select a suitable image and load it to your Media Library. Site Icons should be square and at least 512 × 512 pixels.

Colours: This allows you to set the **Theme Skin** as Light or Dark, and to control **General Colours** such as of the Header Text, Background, Header Background and Accents. You can leave the default settings, or try different colours to create a style you feel comfortable with. Your choice may be affected by your choice of **Header Image** (see below).

Typography: You can choose different fonts and weights your Heading, Body Text, and Primary Menu. Again you can play with these or just accept the default settings.

Header Image: The Header Image is the photo that appears in your banner. This is currently a template image that you should change. To do this you need to upload an image of your choice to the **Media Library**. There are some **Suggested** images shown of the settings page, and a few images in the Library you can practice with.

Select the **Add New Image** Button and you will be taken to the **Media Library**. Click on the image of your choice and then select **Select and Crop**.

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You will be presented with a view of the image with a suitably shaped cropped area across the top of the image. You can drag this area down the image to select the portion you would like to display, and then select **Crop Image**. The cropped area will appear as your banner, and will also be added to the list of **Previously Uploaded** images. To remove a previously uploaded image, select it and then click on the cross in the top right corner. Both the original image and the cropped version will remain in the Media Library. Remember to select **Publish** to update your blog with your new image. You can also access the Media Library from the *Dashboard Media - Library*.

Background Image: This allows you to select an image to appear on all of your **Pages**, behind the content of the page. No image is set, but you can select **Select Image**, to add one if you wish. The process is similar to selecting a Header Image except the image isn't cropped and it is repeated to fill the extent of your **Pages**.

Menus; When you create Pages you can add these to menus and sub-menus that appear above your banner. They can be customised at any time from the *Dashboard Appearance – Menus*. See the **Static Pages and Menu** section below for more details.

Widgets: Widgets appear in your site Sidebar. These can be customised from the *Dashboard Appearance – Widgets*. The default Widgets selected for your Blog are discussed in the **Widgets and Sidebar** section below.

Homepage Settings: Does the Home page show **Your latest posts** or **A static page**? The Blog is set to show Posts, but you can toggle between the two'

Additional CSS (own code): This is not used, and you are unlikely to need it for a standard Blog.

Post Options: You can select to show a **Post Excerpt** or the **Full Post** on the post listings page. If **Post Excerpt** is selected about 6 lines of your Post will be shown shown in the post listings, together with a Read More Button. See **Posts** under **Examples of Use** for more on how to control the size of your **Post Excerpt**.

Wordpress Settings

Review the default Wordpress settings. You can leave most of the settings as they are, but there are a few things to consider. Select *Dashboard Settings* to reveal the following submenu items.

General: Ensure the **Administration Email Address** has been set to the one you want to use and correct it if necessary. Also the Site Language is set to

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English (UK), and the **Time Zone** is set to London (UTC+1). You may need to change these to match your location. **Date Format** is set to 24 June 2023 which you can also change if you wish.

If you do change the **Administration Email Address** a confirmation email will be sent to the new email address. This email will contain a link to the **General Settings** page. To confirm the change click on the link. An email will then be sent to the original address confirming the change.

Writing: The **Default Post Category** is set to Post. Post is the only category defined. If you wish to categorise your Posts by subject, you can create Categories. Categories are set and managed from Dashboard *Post – Categories*. Then you could select a different default Post category.

Reading: Here you have options to change your homepage settings, including what **Your homepage displays**, and whether to show full posts or Excerpts. These have already been addressed in Theme customisation..

Discussion: These settings define how Comments are handled. You can leave the settings unchanged but it is important that you review them. The default settings allow people to comment on Posts, and state that you will be emailed whenever a Comment is received or held for moderation. Comments are held for moderation and only placed on the website when you Approve them. However, once you have Approved a Comment from a user, that user's future comments will be accepted without being held. Other settings control the appearance of Comments.

To see your comments go to *Dashboard - Comments* for a list of Comments with the most recent on top. Hover your cursor over a comment to bring up a menu which includes **Approve/Unapprove, Reply, Edit, History** and **Spam** options

The next three settings groups, **Media, Permalinks**, and **Privacy** should be left unchanged. A Privacy Policy Page is provided which links to the Guild Blog Project Privacy Policy,

Replacing the Guild Badge with Your Name and Image

The blog is designed to have your photograph at the top of the right-hand sidebar. Readers like to see an image of the person who is writing the blog. Ideally you need a photograph of 180 x 180 pixels. Upload this to the Media Library using *Dashboard Media – Add New*.

The image will be placed in what is called a widget. Select *Dashboard, Appearance – Widgets*. Look under Sidebar for **Text: Member**. if you cannot

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see this, click on the small down-arrow to open the contents of the Sidebar. If you have a Postholder blog use the **Text: Postholder** widget.

Click on the down-arrow next to Text: Member to open the Widget. Replace the title with your own name. Select the image of the Guild badge and then the small pencil (Edit) icon to open the **Image Details** window. Click on **Replace** to replace the badge with your own photograph. Select your photograph from the Media Library and then click **Replace** on the following screen. When you are back to the widget, click **Save** to save your changes.

Still in the widget, you will see text below the image. Replace the bracketed text with your name. If you prefer you can rewrite the complete text. Select **Save** to save all the changes to the widget.

Your Profile

Dashboard Users – Your Profile will open your Profile. Alternatively you can access it from a sub menu that appears if you hover your cursor over the Hi, user name menu item at the top right of your Dashboard.

Ensure that your Name and Email are correct. Enter your photo, and biographical details as required. Only the email and nickname are required. Whatever is shown in the **Display name publicly as** field will be your name on notifications of your Posts. The choices are limited to the administrators' nicknames.

Static Pages and Menus

Your Blog has been set up with several static Pages organised into a menu to demonstrate the techniques of organising a Menu. Many of them will not be needed in the future so you will need to delete them when you have finished with them.

Select *Dashboard Pages - All Pages* to see a list of the default pages that have been added. Hover your cursor over a Page name to see options to **Edit, Quick Edit, Bin, or View** the Page.

To delete a Page from *Pages - All Pages* select the Page you don't want and select **Bin** from the available actions. Then update your Menu. From *Dashboard Appearance - Menus* select the down arrow in the Page you wish to remove to expand it, and then select Delete. You should also check the sequence of any remaining Pages is to your satisfaction.

To add a new Page go to *Dashboard Pages – Add New* and you will be taken to the Page Editor. For more detail on creating Pages and Posts see the **Example of Use** section.

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Review the existing pages and make any changes that you require. Your changes will not be saved until you select **Update**.

The Pages provided are:

About: This is just a stub that you can edit to include information about you and your Blog. You are advised to keep it and update it to be relevant to your Blog.

Privacy Policy: This is a sub-page of About and includes a link to the Guild Blog Program Privacy Policy. This page should be retained, but you can change its position in the Menu if you wish.

Contact Me: This is a page created with the **WPForms Lite** plugin that includes a simple form that allows users of your site to contact you. It incorporates a reCapture to weed out bots, and a Guild image to identify the email that you will receive as a coming from your Blog.

Configuration Guide: This is a page with several sub-pages that contain the content of this Configuration Guide. The Configuration Guide page also contains a link to the PDF version of this guide. Once you have accessed and printed the PDF version, these pages only serve as another example of a menu structure, and can be deleted when you have finished with them.

Content Page: This page contains further information on static pages and includes examples of linking to a PDF in your media library, and to an external website, in this case the Guild website.

Some Pictures: This is an example of a page with links to pictures in the Media Library. Both this page, and the Content Page use some of my own content for illustration. The techniques used apply equally to Posts. The pages and the content that they link to can be deleted when you have finished with them.

You are advised to expand the **About** page, and keep the **Privacy Policy** page, and the **Contact Me** Page. You can edit the text on the **Contact Me** page from *Dashboard Pages - All Pages*. To change the image on the Contact Me emails you receive go to *Dashboard WPForms Lite - Settings*, and select the **Email** tab. Upload a new header Image from your Media Library using the Upload Image button.

You can add further pages as and when you wish.

Update the Welcome Post

Select *Dashboard Posts – All Posts*. There is one post provided, **The Welcome to My Blog** post. This post is defined as 'sticky' so it will always be

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at the top of your Home page. It is currently a welcome to you, the new blog owner, but if you wish to keep it you should select **Edit** and turn it into your welcome to your visitors. It also uses a technique to show all the post in the Home page, rather than the first few lines. This method uses the Excerpt box and is described in detail in the **Examples of Use** section.

The Post and Pages that are already set up are owned by the gbp-admin user. You may wish to reassign these to your own user id using the **Author** function in the side bar on the Page and Post edit page. You will need to select the Post or Page tab at the top of the side bar.

Alternatively you can change multiple Pages from *Dashboard Pages - All Pages*. Click the selection box against each Page you wish to change. The current owner is listed against each Page. Next select **Edit** from the **Bulk Actions** pull-down, and then click **Apply**. A Bulk Edit window will open that allows you change the Author to any other Registered User. Other options include changing the Parent Page in the Menu, whether Comments re allowed or not, and the Status of the Page. A similar facility is available for Posts that also includes changing Categories, Tags, and whether the Post is Sticky.

Test Your Site: Under the name of your blog there at the top left, select **Visit Site**. Check that your blog looks the way you want, and the menu works correctly.

Widgets and the Sidebar

The Sidebar sits on the right hand side of each Page of your site. It is present at all times so it is a useful place to put information you wish to be constantly visible. Its content consists of Widgets.

You can manage your Sidebar from the *Dashboard Appearance – Widgets*. The Widgets page has the current contents of your Sidebar down the right, and the available Widgets on the left. Some Plugins add additional widgets.

To place Widgets in the Sidebar when using a mouse or finger, simply drag them from the left to the right. You can also drag them up and down the Sidebar to reorder them. Some devices use Move options within the widget.

To edit a Widget in the Sidebar click on the downward arrow on the right side of the Widget and it will expand to allow editing. There is also Delete and Done buttons

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The initial set of widgets is as follows:

- A **Search** Widget. This lets a visitor search your site for any keyword or phrase.
- A **Text** Widget titled 'Study' containing the Guild button, and some template text that introduces the Blog. You should amend the wording as appropriate.
- A **Text** Widget titled 'Member'. You will have updated this with your photo and appropriate text during customisations. See **Replacing the Guild Badge with Your Name and Image**.
- A **Text** Widget titled 'Postholder'. If you are Postholder use this widget instead of the Member widget and delete the Member widget. Otherwise delete this widget.
- A **Text** Widget that describes the Guild and provides a link to the Guild website.
- A **Subscribe** Widget provided by the Subscribe2 Plugin. It provides **Subscribe** and **Unsubscribe** buttons. The associated wording can be edited. When you are logged on as an Administrator there is wording that your subscriptions are managed from your Profile. This is accessed via the *Dashboard Subscribe2 – Your subscriptions*. To see what a visitor would see, access the site as a user.
- A **Recent Posts** Widget that lists your most recent Posts with the most recent at the top. The number shown is customisable, and set to 10.
- A **Recent Comments** Widget that shows the most recent Comments. The number shown is customisable, and set to 5.
- An **Archive** Widget that gives access to old posts. It is titled 'Old Posts by Month' and is set to give a drop down showing the number of posts in each month. If you select a month the Posts for that month will show in your Home page.
- A **Text** Widget entitled Links showing how you could construct a list of links to related websites or parts of your site. The examples are a link to the Plugins page and a link to the Guild website. You should either repurpose this Widget, or remove it.
- A **Subscriber2** Counter widget that shows the number of subscribers to your blog.
- A **Meta** Widget that gives some useful links.

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You are free to add and remove Widgets as you wish, except the Study, Member or Postholder, Guild, and Meta widgets must be retained.

Plugins

We have installed a set of WordPress Plugins to provide basic security and functionality for your Blog. We have also installed some additional Plugins you might wish to consider. There are numerous other Plugins available from WordPress you are free to use to expand your site, provided you remain within Guild guidelines, and only use free versions.

There follows a description of the installed Plugins, along with any options selected, and any outstanding actions required. The Plugins are:

Security and Performance Plugins

Akismet: The purpose of Akismet is to protect your site from SPAM, particularly in the Comments that can be made on your Posts and Pages. Akismet is highly recommended for protection from SPAM.

However you will need to activate Akismet and set up your own, free Personal non-Commercial Akismet account, and obtain your unique API key. The process is as follows:

- Select *Dashboard Plugins – Installed Plugins*. Select Akismet from the list and click on activate. You will see the Activate settings page with the old API key. Select the option Disconnect Account.
- You are now invited to Set up your Akismet Account. This takes you to an Akismet Account setup screen in a separate tab.
- Select Personal Account.
- Although a personal account is free you will be asked for a voluntary payment of £nn/year. There is a slider to adjust the amount. Move it all the way to the left so it says £0/year and the payment details fields disappear.
- Fill out the email, first and last name, and URL fields, and check the three boxes to confirm your site has no ads, doesn't sell products, and doesn't promote businesses. Then press Continue with Personal Subscription.
- A verification code will be sent to the email address you entered above. Copy and paste this into the box provided.
- A sign up complete screen is presented with further instructions. A further email will be sent with your API key.

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- Return to the tab with your Akismet settings screen and select 'manually enter API key'.
- Copy and paste the key into the settings screen.
- Make any other desired settings changes. You might want to check the box to show the number of approved Comments from each Comment author.
- Save the changes. Your Akismet is activated.

Should a SPAM comment get past Akismet you should mark it as SPAM so Akismet can learn. *Dashboard - Comments* gives a list of Comments with the most recent on top. Hover your cursor over a comment to bring up a menu which includes a **Spam** option.

Also you should regularly (fortnightly) check your SPAM folder for any genuine comments and mark them as 'not SPAM'. This will make Akismet more accurate. To do this go to *Dashboard Settings - Akismet Anti-Spam*. This will give statistics on blocked SPAM and, and, in the Settings section, a link to your SPAM folder which holds all SPAM blocked in the last 15 days,

Limit login attempts reloaded: This limits the number of login attempts from an IP address allowed. The default settings are 4 attempts allowed before a lockout of 20 minutes. Four lockouts results in a 24 hour lockout. These can be altered but the defaults work OK. The only relevant logins are yours, and any associate administrators/publishers.

LiteSpeed Cache: This improves page caching performance. No action is required.

Loginizer: This helps you fight against bruteforce attack by blocking login for the IP after it reaches maximum retries allowed.

reCapture: This puts a reCapture object on any form, including Comments, that users may use to communicate with you. Settings allow you to chose between Version 2 and Version 3, reCaptures, and enable it for various types of form. It is set up for Version 3, and only for Comments. Version 2 is adequate for a single user blog. This produces an "I am not a Robot checkbox". If you choose to change t Version 2 reCapture you will also need to get new API keys from Google. There is a link on *Dashboard reCapture - Settings*.

You can also add a reCapture to forms, such as a Contact Form, that you might implement with **WP Forms Lite** (see the Functional Plugins section). If

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you allow users to register and login you may want to implement Version 3 and include other types of form.

Wordfence Security: This provides a Firewall, and anti-virus, and anti malware scanning. A summary of threats it has encountered in the previous week is presented on the Dashboard. It also has its own Dashboard giving access to greater detail.

The only action necessary is to change the email address for Wordfence notifications to your own. This is found in *Dashboard Wordfence – All Options*.

Backup Plugin

Updraft Plus: Your site will automatically be backed up daily, and backups will be kept for 31 days. However you may wish to keep your own backups in a safe place of your own choosing. Updraft Plus has been installed and activated, and can be accessed via *Dashboard Settings – UpdraftPlus Backups*. Simply click the Backup Now button on the Backup/Restore (default) tab to perform a manual backup to the Guild's server.

Your backup will be listed on the Backup/Restore page along with a Restore button, and access to the backup log. Simply press the Restore button to restore the backup. You will be offered a selection of components to restore. If in doubt check them all, click Next, and then click Restore. When the restore is complete and you are happy with it, click Delete Old Directories. Additional restores will not be possible whilst these exist.

If you wish to backup to your own storage, such as a Dropbox, select the Settings tab. Here you will be presented with a range of options. Select the one that represents the storage you have access to, and follow the instructions (these will vary depending on the storage you choose).

You can also use the Settings tab to set up scheduled backups.

Functional Plugins

Subscribe2: Subscribe2 allows you to maintain a list of Subscribers to your Blog. It is described in detail on the **Subscriber Management Page**.

WP Forms Lite: This allows you to design forms that can be included in Pages on your site.. A simple Contact Me form and Page have been implemented to allow users to contact you (see the **Static Pages and Menu** section).

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Sassy Social Share : This Plugin provides sharing icons to provide links to social media. There is a large number of icons to chose from. The initial set of links chosen is:

- Facebook
- WhatsApp
- Twitter
- LinkedIn
- Mail
- Print
- Facebook Like
- Tweet

There are options for a static and a floating set of icons. In the initial configuration the static icons are placed at the bottom of Pages and Posts, and the floating icons are disabled. Share counts are enabled. This can be reconfigured as you wish.

Activity Plugins

Page Views Count: This allows you to a place a visitor count on each Post and Page, and and a count of site visits in the Sidebar. It is set to show on Posts and Pages. This can be changed for Posts or Pages, and overridden for individual Posts or Pages.

Subscriber Management

Subscriber functionality is provided by the **Subscribe2** Plugin. It includes functions to build a list of subscriber email addresses, allow users to subscribe to, and unsubscribe from the email list, and distribute notifications of Posts to subscribers.

Go to *Dashboard Subscribe2 – Settings* to manage the Subscribe2 settings. There are a number of tabs, and the current settings are as follows:

Email Settings: These settings control the sending of emails by the system. They are set so it will send you a notification whenever anyone subscribes or unsubscribes. Email notifications of new posts are sent twice daily (if there are new posts), and are from the Post Author. This will be the **Display name publicly as** name set up by each author in his Profile.

Templates: These templates define the emails that are sent by the system to notify a new post, request confirmation of a subscription request, and a reminder to unconfirmed users. The only change to the default format is to hardwire the URL of Standard Template into the notification email. This will

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need to be updated to your site URL. You are free to amend the rest of the text if you wish.

Registered Users: A list of your current Registered subscribers can be obtained from *Dashboard - Subscribe2 - Subscribers*, and selecting the Registered Subscribers tab. The only option of interest on this page is the second from last option, to place a subscribe option on the Comment form. This set to Yes, Before the Comment Submit Button.

Appearance: These settings control where the Subscribe tools appear. The three that are checked are:

- Show the Subscribe2 button on the Write toolbar. This gives the option, when writing a Post, to suppress the sending of an email.
- Enable Subscribe2 widget. This widget is then placed in the sidebar where it provides a Subscribe / Unsubscribe interface.
- Enable Subscribe2 Counter widget. This widget can then be placed in the sidebar where it displays the number of subscribed users.

Miscellaneous: This area has some useful links, and an area to enter domains you wish to bar for public subscriptions.

In addition to **Settings** the Subscribe2 submenu has three other items:

Your Subscriptions: This allows you to manage your own subscriptions. If you continue with the preset option to send notifications emails twice daily, you only have the option to turn them on and off. However if emails are sent for individual Posts then you can control what is received by Post Category. Only one Post Category is defined in the initial setup. This is called Post, and is the default category for all Posts. New Categories can be added from *Dashboard Post – Categories*.

Subscribers: This page provides lists of your Registered and Public Subscribers. Initially you and the gbp-team will be the only Registered Users listed, but if you allow users to register and login to your site, or you appoint a co-administrator, or additional Post authors, this list will grow.

You can perform bulk actions such as add and delete subscribers, and for public subscribers you can toggle between confirmed and unconfirmed.

Send Email: Here you can compose an email and send it to any combination of public and registered subscribers, and users.

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Examples of Use

Posts

The Posts menu in the Dashboard has 4 subheadings, All Posts, New Posts, Categories and Tags.

All Posts: This lists all posts on your site, and allows you to edit or delete them. There is only one post provided, **The Welcome to My Blog** post. You should have updated this to be a welcome to **your** blog.

Add New: This gives you access to the WordPress Block Editor where you can construct a new post.

Categories: You can define subject categories and assign Posts to different Categories. This is where you can manage those Categories. Only one Category, Post, has been defined, and it is the default.

Tags: You can also assign Tags to Posts. However none have been defined so far.

Block Editor

The Block Editor is the standard WordPress editor for Posts and Pages. It provides different types of Blocks for you to construct your output from, including headings, text, lists and images. There are tutorials on the web on using the Block Editor, such as [this](#). Here I will just introduce a couple of tricks.

There are a few options in a menu at the top of the screen, split between a group on the right, and a group on the left. The third icon from the right is a **Settings toggle** which shows or hides a menu on the right of the screen. The menu has 2 tabs, **Post** and **Block**.

Under the **Post** tab you will find options including **Stick the post to the top of the blog**, **Author**, **Categories**, **Featured Image** and **Excerpt**.

Featured Image will allow you to select an image from your Media Library to appear at the top of your Post. The image is also used when you share a link to the post on social media.

Excerpt: With the default customisation choices, the Nisarg theme places the first six lines of each post on your **Home** page, followed by a **Read More** button. If you would like more, or even all of a post (including any embedded media) to appear on the Home page you can achieve this by copying the part of the Post you wish to display into the **Excerpt** box. However be aware that

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updates to the Post are not automatically copied to the Excerpt box, so you will have to repeat the cut and paste if the updates affect the Excerpt.

Code Editor

If you click on the three dots at the right of the top menu you get a drop down that includes the ability to switch between the visual editor you normally work with, and a code editor which gives you access to the underlying HTML. If you are confident with HTML you can work at this level. When copying an Excerpt you can use either the Code Editor, or the Visual Editor.

Creating a New Post

Select *Dashboard Posts – Add New*. This will take you to the Block Editor.

Give your post a title and add the contents. Build your Post using the different types of block, such as paragraph, heading, list, image etc. You add a new block by selecting the small plus (+) sign to the right of your Post.

If you type / as the first character of a new block you will get a drop down of the most common types of Block. If you click the + symbol (Toggle block inserter) in the top left menu you will see a structured list of all the available blocks. One of the choices is a **Classic Block** which uses the editor WordPress used before the introduction of the Block Editor.

Pages

The Pages menu in the Dashboard has 2 subheadings, **All Pages**, and **New Page**. These behave much the same as the equivalent subheadings for Posts.

To create a new Page select *Dashboard Pages - New Page*. This will display the Block Editor. The layout of the editor is very similar to that for Posts. The settings panel to the right of the screen is also very similar though not all the Post options are relevant for Pages.

Customising the Menu

Once you have created a New Page, you need to include it in your Menu. Select *Dashboard Appearance – Menus*, and find your new Page in the list of Pages on the left of the screen, tick the checkbox next to the page name, and then click **Add to Menu**. The Page will appear at the bottom of the menu structure on the right of the screen. You can then move the menu items to the correct position in the menu by dragging it with finger or mouse. You can

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make it a sub-menu by indenting it slightly under the menu item you are attaching it to. Some devices use Move options within the Menu items to move them.

If you have deleted some pages, remove the link to them in the Menu by clicking on small down-arrow next to the menu item and selecting **Remove**.

Once you have made the changes you require, select **Save Menu** at the top right of the window.