

NSO WEB ADMINISTRATORS SEPTEMBER 2019 WORKSHOP

PART V – WORDPRESS CONFIGURATION

USER MANAGEMENT

“As users of the Internet, we all have a role to play in defining what we want it to be.”

Lily Cole – Actress and Entrepreneur

WP User Management

User roles (simplified overview)

Permissions	Administrator	Editor	Author	Contributor	Subscriber
Edit posts	✓	✓	✓	✓	
Publish posts	✓	✓	✓		
Edit pages	✓	✓			
Publish pages	✓	✓			
Manage categories	✓	✓			
Moderate comments	✓	✓			
Themes and plugins	✓				
Manage users	✓				

Full list of roles and permissions

<https://www.wpbeginner.com/beginners-guide/wordpress-user-roles-and-permissions/>

WP User Management

User roles (network sites)

Permissions	Super administrator	Site administrator
Manage users	✓	✓
Enable themes	✓	✓
Enable plugins	✓	✓
Install new themes	✓	
Install new plugins	✓	
Update themes	✓	
Update plugins	✓	
Update WP core	✓	

Network Super Administrator keeps Wordpress core, themes and plugins up-to-date for all WP sites at once.



Site administrators configure their website the way they want, including:


- Plugins options
- Theme customization
- User management
- Page and post contents


If you need to install new themes or plugins, you will have to contact a super administrator.


WP User Management


List of users


 My Sites  Tonga NSO 0 + New


 Dashboard


 Posts


 Media

 Pages

 Comments

 Appearance


 Plugins

 Users

All Users

Add New

Your Profile

 Tools

Users [Add New](#)



All (2) | [Administrator](#) (2) | Blocked Users (0)

Bulk Actions ▾

Apply

Change role to... ▾

Change

<input type="checkbox"/>	Username	Name	Email	Role	Posts	Comments	Last login
<input type="checkbox"/>	 hostmaster@spc.int	SPC Administrator	hostmaster@spc.int	Administrator	0	0	August 29, 2019, 12:17 am
<input type="checkbox"/>	 tonga	Mele Taumoepeau	mele@fake.mail.to	Administrator	0	0	August 29, 2019, 12:19 am

☐ Username

Name

Email

Role

Posts

Comments

Last login

Bulk Actions ▾

Apply

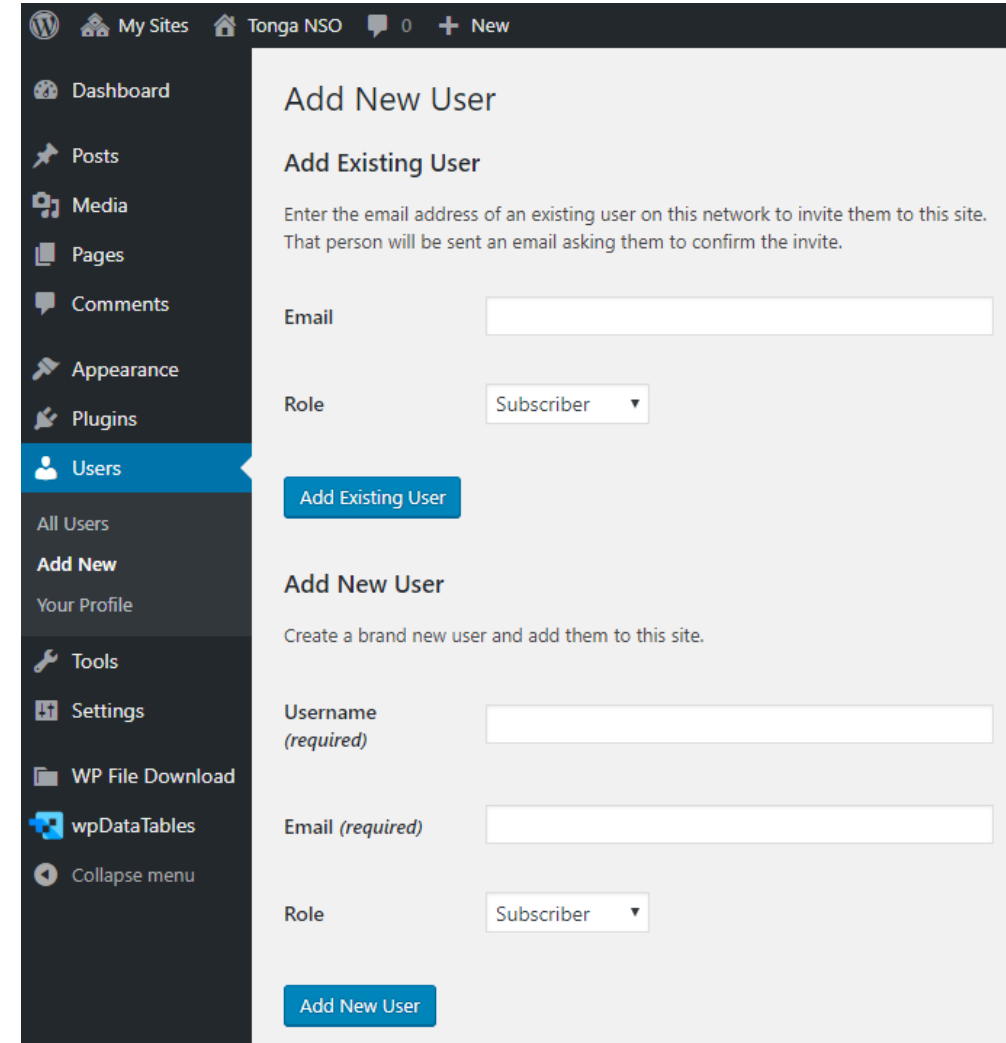
Change role to... ▾

Change

WP User Management

Add new user

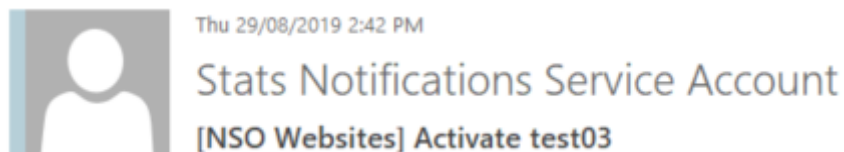
- 1) Click on [Add New](#) button or link from menu
- 2) Fill the form (add new user)
Do not forget to select the role for this user
- 3) Click on [Add New User](#) button
- 4) An [email is sent](#) to the user to confirm the email address and give access to the website
- 5) User receives the link (or not) and confirms his account



The screenshot shows the WordPress dashboard with the 'Users' menu item selected. The 'Add New User' form is displayed, featuring two sections: 'Add Existing User' and 'Add New User'. The 'Add Existing User' section includes an 'Email' input field and a 'Role' dropdown menu set to 'Subscriber', with an 'Add Existing User' button below. The 'Add New User' section includes 'Username (required)' and 'Email (required)' input fields, a 'Role' dropdown menu set to 'Subscriber', and an 'Add New User' button at the bottom.

WP User Management

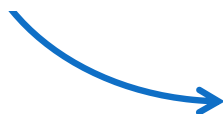
Add new user



Hi,
You've been invited to join 'NSO Training' at <http://training.nso.spc.int> with the role of Editor.
If you do not want to join this site please ignore this email. This invitation will expire in a few days.

Please click the following link to activate your user account:
<http://training.nso.spc.int/wp-activate.php?key=4d04ed0792e6ab52>

Please make sure to check the
SPAM folder

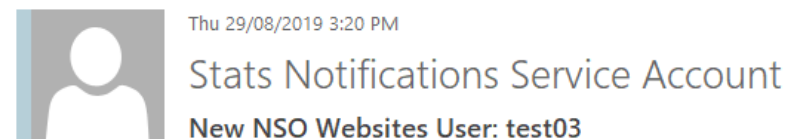
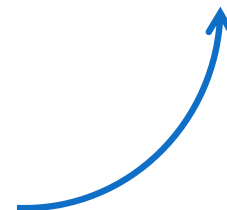


Your account is now active!

Username: test03

Password: XS1nXBJdevJ4

Your account is now activated. [Log in](#) or go back to the [homepage](#).



Howdy test03,

Your new account is set up.

You can log in with the following information:

Username: test03

Password: XS1nXBJdevJ4

<http://training.nso.spc.int/nso-login/>

Thanks!

WP User Management

Manage users

Firstly, select user(s) by ticking corresponding checkboxes

Update user role

Select new role from “Change role to...” drop down list.

Block user

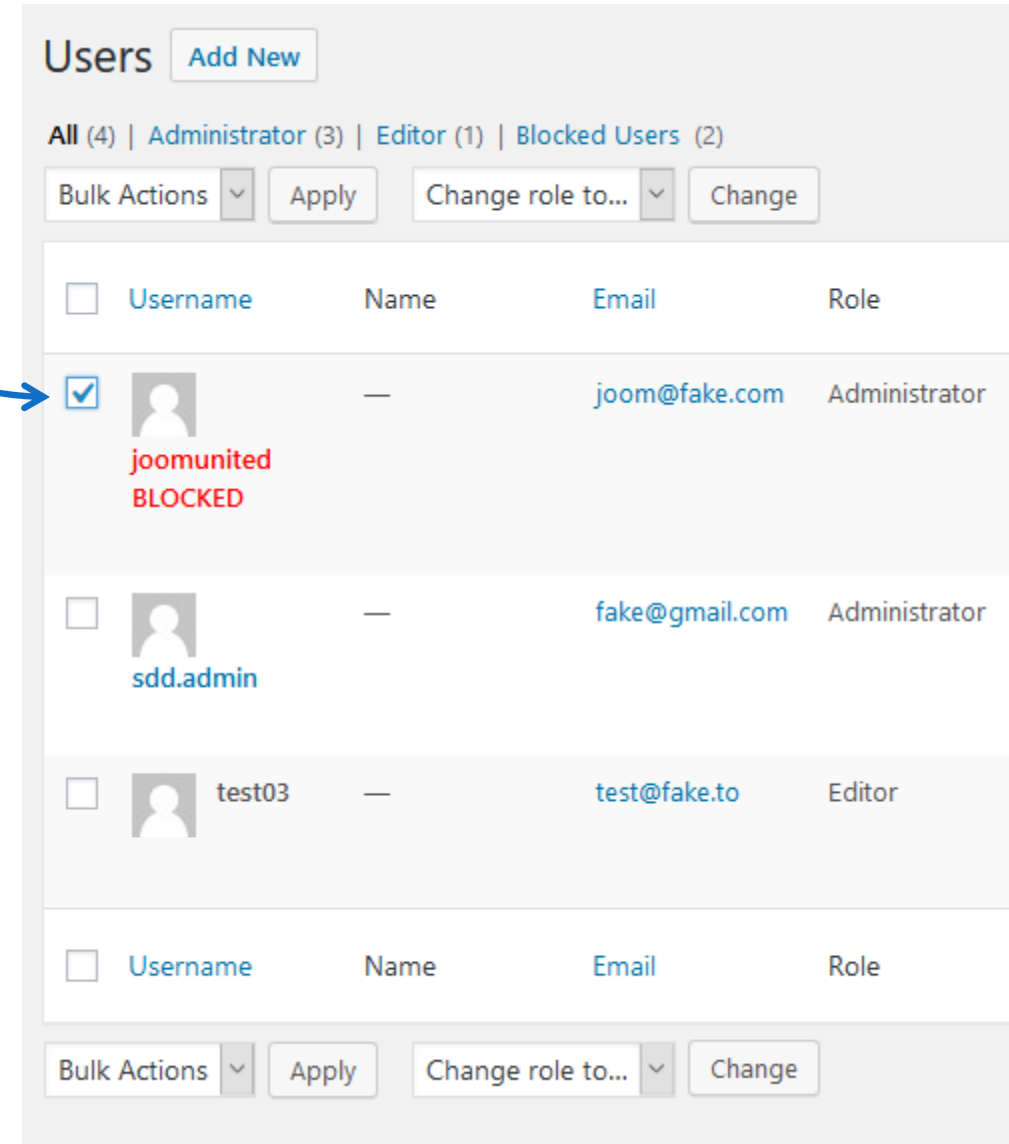
Blocked users can not login anymore (temporary disabled).
Select “Block” from “Bulk actions” drop down list.

Remove user

Unlink user from the website
Does not delete user account or content created by him

Delete user

Deleting user accounts can only be done by network administrator. May delete content created by the user depending on options selected.



The screenshot shows the WordPress 'Users' management page. At the top, there's a 'Users' header with an 'Add New' button. Below it, filters show 'All (4)', 'Administrator (3)', 'Editor (1)', and 'Blocked Users (2)'. Action buttons include 'Bulk Actions' (a dropdown menu), 'Apply', 'Change role to...' (a dropdown menu), and 'Change'. The user list table has columns for 'Username', 'Name', 'Email', and 'Role'. Three users are listed: 'joom' (Administrator, email joom@fake.com), 'sdd.admin' (Administrator, email fake@gmail.com), and 'test03' (Editor, email test@fake.to). The 'joom' user's checkbox is checked, and a red 'joomunited BLOCKED' status is shown below their profile picture. The 'test03' user's checkbox is also checked. The table structure is repeated at the bottom of the visible area.

<input type="checkbox"/>	Username	Name	Email	Role
<input checked="" type="checkbox"/>	joom	—	joom@fake.com	Administrator
<input type="checkbox"/>	sdd.admin	—	fake@gmail.com	Administrator
<input checked="" type="checkbox"/>	test03	—	test@fake.to	Editor

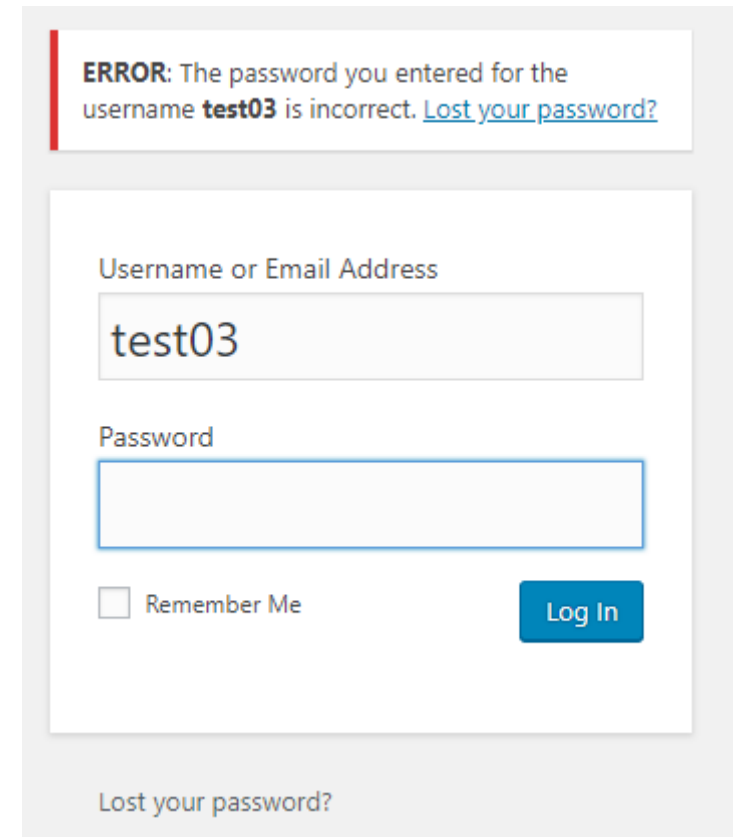
WP User Management

Lost password

Users who forgot their password should follow the “lost password” procedure (see next slide)

Site administrators can not reset user passwords (only network administrator)

After a few failed attempts within a short period of time, user accounts can be blocked automatically.



ERROR: The password you entered for the username **test03** is incorrect. [Lost your password?](#)

Username or Email Address

test03

Password

☐ Remember Me

[Lost your password?](#)

WP User Management

Lost password

Username or Email Address

Password

☐ Remember Me

Lost your password?

Please enter your username or email address. You will receive a link to create a new password via email.

Username or Email Address

Enter your new password below.

New password

Strong

Hint: The password should be at least twelve characters long. To make it stronger, use upper and lower case letters, numbers, and symbols like ! " ? \$ % ^ &).



Thu 29/08/2019 4:28 PM

Stats Notifications Service Account [NSO Websites] Password Reset

Someone has requested a password reset for the following account:

Site Name: NSO Websites

Username: test03

If this was a mistake, just ignore this email and nothing will happen.

To reset your password, visit the following address:

<<https://nso.spc.int/nso-login/?action=rp&key=RAkx9UzpfSlyh1mCWnP0&login=test03>>

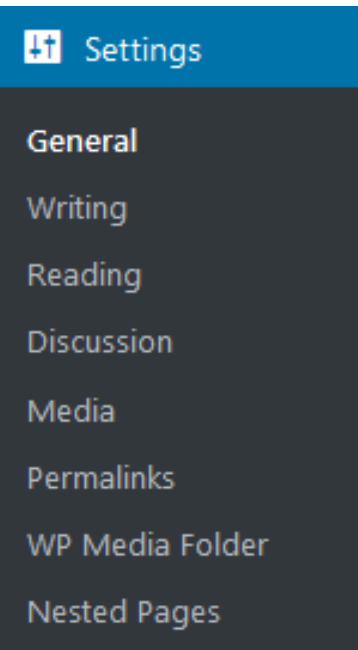
GENERAL SETTINGS

“There’s no bad tools. There’s only bad users.”

Anonymous

WP General Settings

First items from the menu



- **General**

Basic site settings

e.g. site name, language, timezone, regional format

- **Writing**

Default options when writing posts

- **Reading**

More site settings and blog options

- **Discussion**

Commenting system options

- **Media**

Basic WP settings regarding media

eg. thumbnail and image sizes

- **Permalinks**

How URL to pages and posts look like

- **WP Media Folder (plugin)**

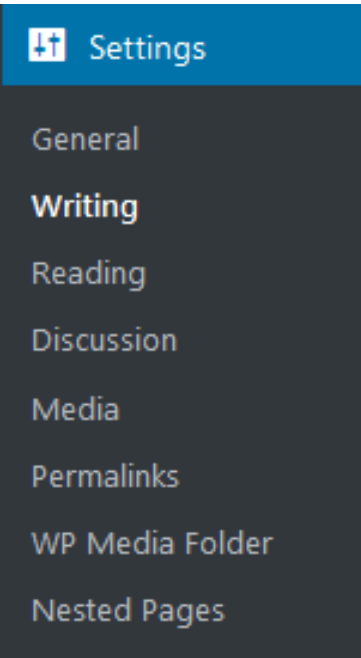
Plugin options (if enabled)

- **Nested Pages (plugin)**

Plugin options (no need to change)

WP General Settings

Writing settings

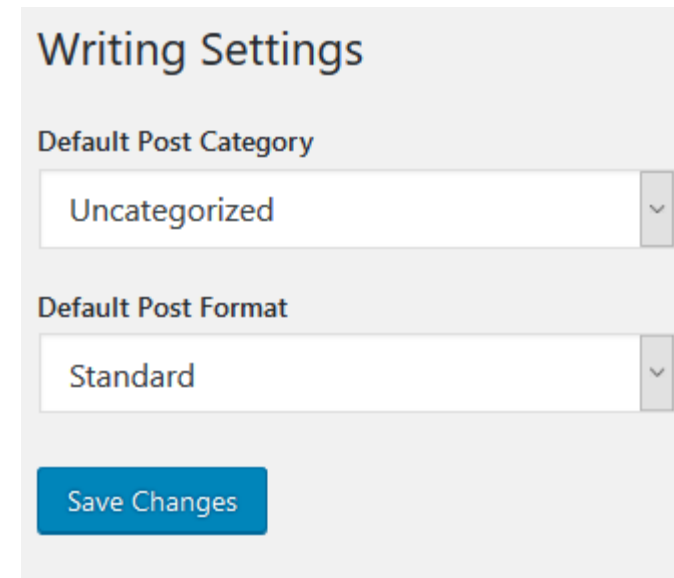


This screen provides 2 settings :

- Default category for your posts
- Default post format

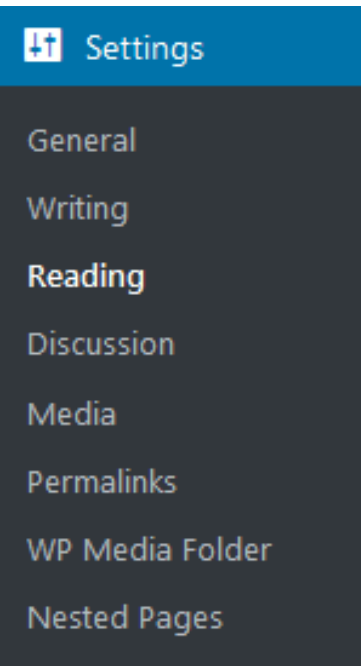
You may come back to this settings once you have set up your post categories.

With the new Gutenberg editor and the Divi theme, the post format (standard, gallery, link, etc..) does not mean much anymore.



WP General Settings

Reading settings

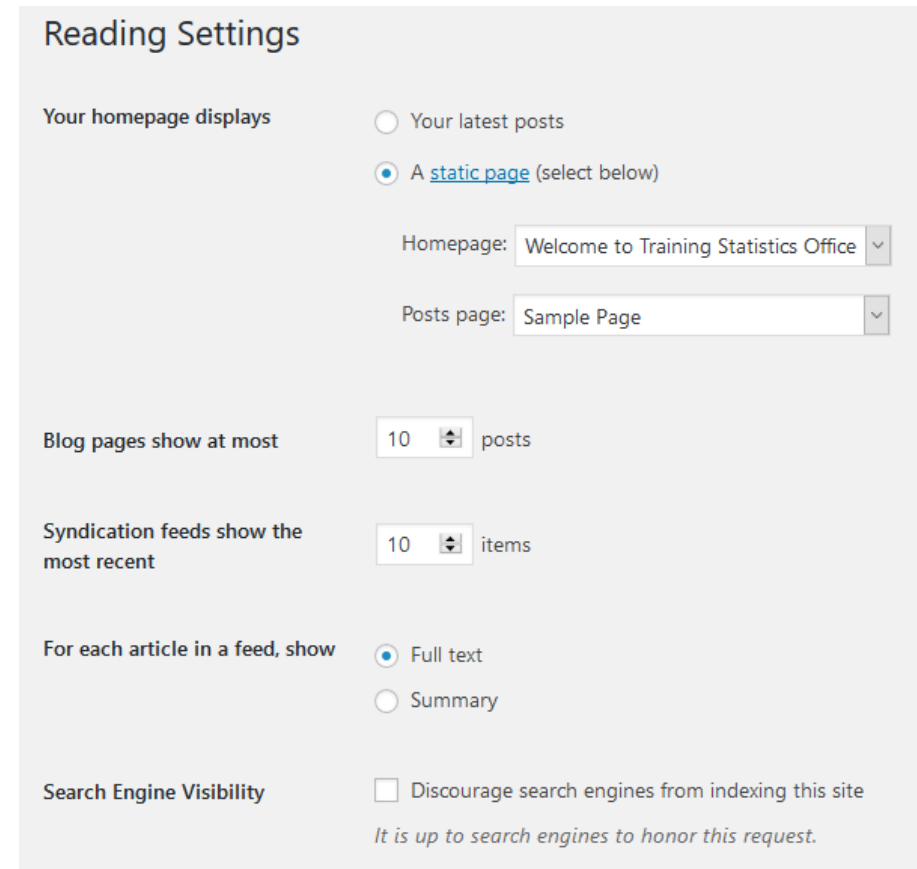


By default, the home page only lists your latest posts. You will want to customize this.

Once the home page is created, you will have to select the home page and posts page options accordingly.

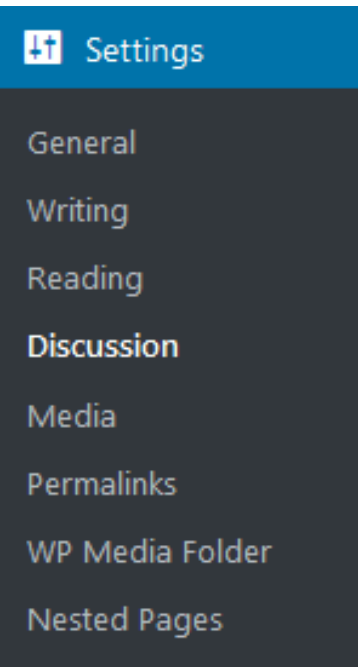
Pretty much all other options can be overwritten by the Gutenberg editor and Divi theme.

Do not forget to untick the last option about Search Engines or your website will not appear on Google and others.

A screenshot of the WordPress 'Reading Settings' page. The title 'Reading Settings' is at the top. The first section, 'Your homepage displays', has two radio buttons: 'Your latest posts' (unselected) and 'A static page (select below)' (selected). Below this, there are two dropdown menus: 'Homepage:' set to 'Welcome to Training Statistics Office' and 'Posts page:' set to 'Sample Page'. The second section, 'Blog pages show at most', has a spinner set to '10' followed by the word 'posts'. The third section, 'Syndication feeds show the most recent', has a spinner set to '10' followed by the word 'items'. The fourth section, 'For each article in a feed, show', has two radio buttons: 'Full text' (selected) and 'Summary' (unselected). The final section, 'Search Engine Visibility', has an unchecked checkbox labeled 'Discourage search engines from indexing this site' and a note below it: 'It is up to search engines to honor this request.'

WP General Settings

Discussion settings



Allowing an open discussion on your website requires moderation, and a strong anti-spam system.

Moderation is very time consuming, and requires clear guidelines on how to deal with your visitor comments.

Unless you really know what you're doing, and are ready to spend a lot of time on your website, you will want to disable comments by selecting the right options (see screenshot).

Discussion Settings

Default article settings

- ☐ Attempt to notify any blogs linked to from the article
- ☐ Allow link notifications from other blogs (pingbacks and trackbacks) on new articles
- ☐ Allow people to post comments on new articles

(These settings may be overridden for individual articles.)

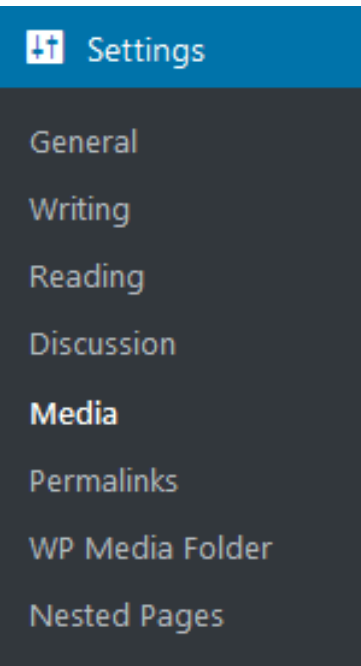
Other comment settings

- ☒ Comment author must fill out name and email
- ☒ Users must be registered and logged in to comment
- ☐ Automatically close comments on articles older than

14  days

WP General Settings

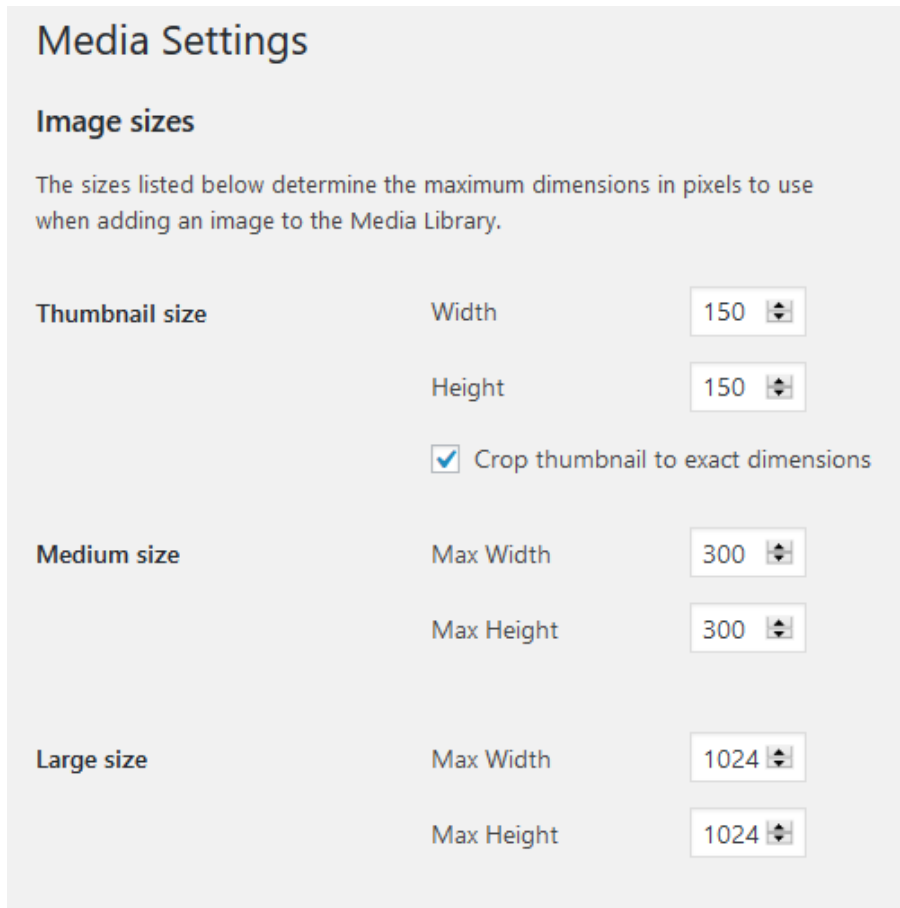
Media settings



Media settings define the default size for images and thumbnails to be used across the website.

- **Thumbnail**
Square thumbnail of an image, used in lists
- **Medium size**
A reduced image to embed in posts
- **Large size**
A large image to embed in headers

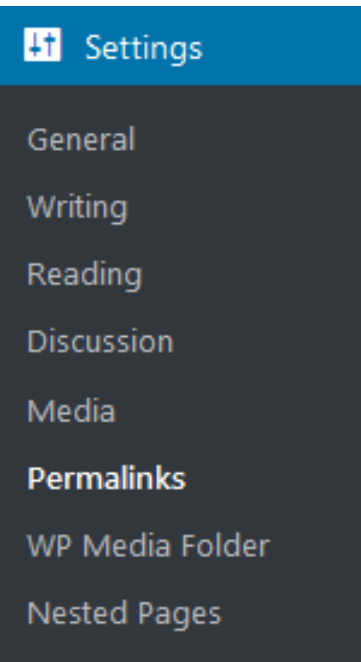
With the help of plugins such as WP Media Folder, those settings can be overridden or extends.

A screenshot of the WordPress Media Settings page. The title is 'Media Settings'. Under the 'Image sizes' section, there is a text block: 'The sizes listed below determine the maximum dimensions in pixels to use when adding an image to the Media Library.' Below this, there are three sections: 'Thumbnail size', 'Medium size', and 'Large size'. Each section has input fields for 'Width' and 'Height'. For 'Thumbnail size', both are 150. For 'Medium size', both are 300. For 'Large size', both are 1024. There is also a checkbox labeled 'Crop thumbnail to exact dimensions' which is checked.

Media Settings		
Image sizes		
The sizes listed below determine the maximum dimensions in pixels to use when adding an image to the Media Library.		
Thumbnail size	Width	150
	Height	150
	<input checked="" type="checkbox"/> Crop thumbnail to exact dimensions	
Medium size	Max Width	300
	Max Height	300
Large size	Max Width	1024
	Max Height	1024

WP General Settings

Permalinks settings

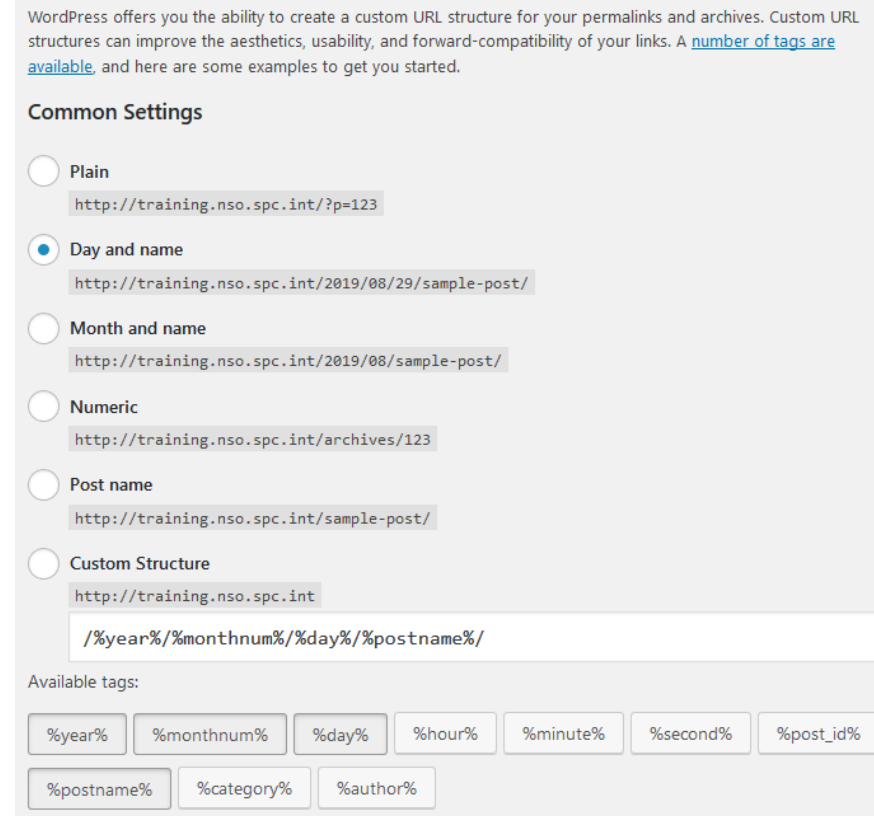


Links to pages and posts are automatically generated by WordPress each time you publish some new content.

URLs are actually quite an important part of Search Engine Optimization (SEO), so you might double check these settings depending on the type of content your publish.

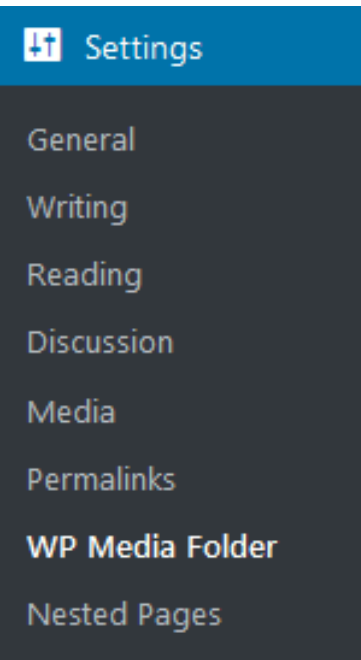
For instance, leave the default option (*day and name*) if you publish very often, but simply use *post name*, or *category* and *post name* if you publish content less than once a month.

Try not to change those settings once site is published as it will create broken links.



WP General Settings

WP Media Folder plugin options

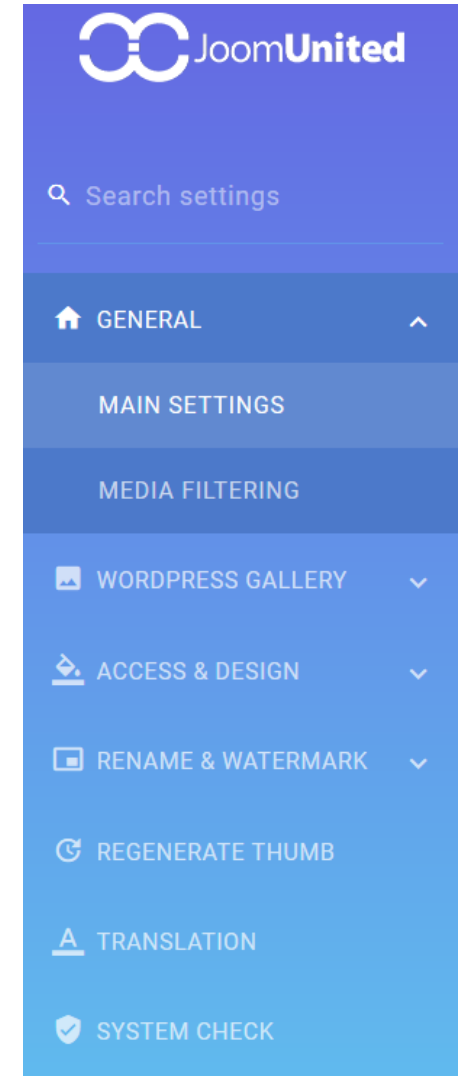


WordPress core has a very basic way of handling media files (images, videos, etc).

You may want to enable the WP Media Folder to have more features, such as :

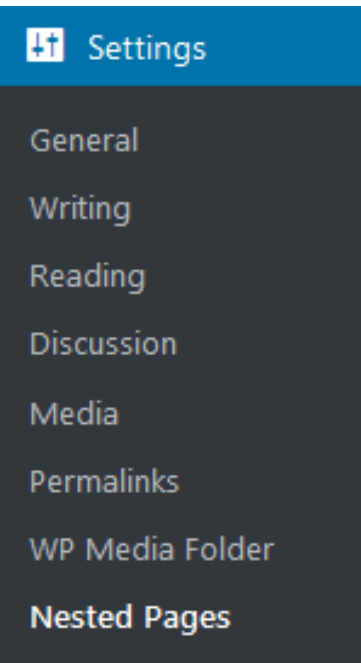
- Organize media files in folders
- Better image galleries
- Duplicate or replace media files
- Add watermark
- Add remote videos (from Youtube)

This plugin offers many different options which we'll see in details in another presentation



WP General Settings

Nested page plugin settings



The nested plugin displays the list of pages as a tree (nested list). It allows you to easily move pages around, or even duplicate them.

Optionally you may change settings to :

Enable nested listing for other content types (eg. Posts)

Change sync options

Add sorting feature to *Editors* (recommended)

Custom admin menu items order

Other than the sorting feature, modify other settings is not recommended.

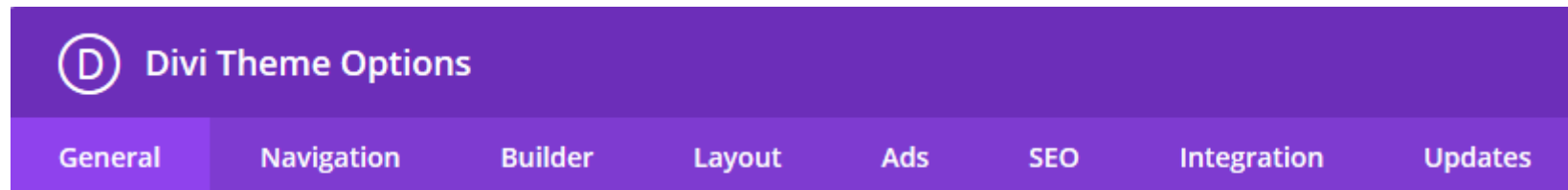
DIVI THEME OPTIONS

“It's easy to make good decisions when there are no bad options.”

Robert Half – American Businessman & Writer

Theme Options

Divi Theme Options



Why did you chose to use the Divi theme (by *Elegant Themes*) ?

- On of the most popular theme on the market
- Built by a professional company
- Regularly updated
- Very flexible

Although the Gutenberg editor is trying to kill the need for page builders, Divi still offers more options than WordPress standard installation.

What's the catch? **Flexibility = Complexity.**

There are a ton of options available and it can be cumbersome to set them right.

Theme Options

Divi Theme Options : General (1/5)

- **Logo**

Update your website logo (image size recommended: w=120 x h=60)

- **Fixed navigation bar**

Enable this if you want to access navigation menu at all times (recommended)

- **Color Pickers default palette**

Select common colours you will use. This helps to have a consistent design.

- **Grab the first post image**

Enable this if you want to avoid using “feature image”

- **Blog style mode**

Leave this disabled unless you want to show full content of posts in blog pages

Theme Options

Divi Theme Options : General (1/5)

- **Sidebar Layout**

Select the position of the sidebar.

What are sidebars ?

Sidebars are used to add common elements to pages, such as:

- Secondary navigation menu
- Latest posts
- Contact information
- Etc.

Left or Right sidebar ?

Most people read a page from left to right, so Left sidebars improves navigation while Right sidebars focus on the content of the page.

Organization

[About Home](#)

[What We Do](#)

[Results](#)

[Organization](#)

- [Member Countries](#)
- [Boards of Governors](#)
- [Boards of Directors](#)
- [Leadership](#)
- [Organizational Units](#)
- [Office of the President](#)
- [Voting Powers](#)

[History](#)

[Speakers Bureau](#)

[Partners](#)

[Jobs and Internships](#)

CONTACTS

Headquarters

1818 H Street, NW Washington,
DC 20433 USA (202) 473-1000

The World Bank is like a cooperative, made up of countries, or shareholders, are represented by ultimate policymakers at the World Bank. General meetings of the Boards of Governors of the World Bank are held in Washington, D.C. The [Monetary Fund](#).

The governors delegate specific duties to 25 Executive Directors of the World Bank. The five largest shareholders appoint an executive director. Countries are represented by elected executive directors.

- The World Bank Group President chairs meetings of the Executive Directors responsible for overall management of the Bank. The Board of Executive Directors for a five-year, renewable term.
- The Executive Directors make up the [Boards of Directors](#) which normally meet at least twice a week to oversee the Bank's operations, approve loans and guarantees, new policies, the adoption of strategies and borrowing and financial decisions.

The World Bank operates day-to-day under the management and senior staff, and the vice president of the Bank. Cutting Solutions Areas, regions, and functions.

Theme Options

Divi Theme Options : General (3/5)

- **Google maps (API Key and Script)**

You most probably want to disable these options (Google map is not free anymore)

- **Social icons**

Configure links if you use social websites

- **Number of posts**

Select number of posts you want to show on pages. Not too many, not too few.

- **Date format**

Already set by WordPress, but set it up again

- **Use Excerpts**

Make sure you write excerpts instead of leaving it to WordPress to cut your content automatically.

Theme Options

Divi Theme Options : General (4/5)

- **Responsive shortcodes**

Yes you want your website to be responsive i.e. to work on mobile devices.

- **Google Fonts subsets**

You don't need this unless you write in non latin characters (Arabic, Chinese, etc).

- **Back to top button**

Useful if you have long pages, and no fixed navigation bar.

- **Smooth Scrolling**

Effect when scrolling with the mouse wheel.

- **Disable Translations**

Yes, disable, unless you have a multi language website

Theme Options

Divi Theme Options : General (5/5)

- **Responsive images**

Yes!

- **Minify and combine JS**

Yes!

- **Minify and combine CSS**

Yes!

- **Custom CSS**

Leave empty unless you know what you are doing

All these options should be enabled to improve mobile devices support and to reduce page loading time

ENABLED

☐

Theme Options

Divi Theme Options : Navigation (1/3)

- **Exclude Pages / Categories from the navigation bar**

By default, Divi creates navigation menus automatically from your content (list of pages and post categories).

This setting allows you to exclude items from the menu, but you will have to come back to this screen every time you create a new page or category if you don't want it to appear in the navigation...

OR

You define your navigation menu from the *Appearance > Menus* page

Menus are described in *Workshop 2019 part 6 : Content structure presentation*

Theme Options

Divi Theme Options : Navigation (2/3)

- **Show dropdown menu**

Enable if you have nested pages and want to navigate through drop down menus

- **Display home link**

Enable if you don't want to create a custom home page (recommended: disable)

- **Sort Page/Category Links**

The way pages are ordered (recommended: menu_order)

The way categories are ordered (recommended: name)

- **Order Page/Category Links**

Recommended: asc (ascending)

- **Number of dropdown tiers shown**

Number of nested levels on dropdown menus (recommended: 2)

Theme Options

Divi Theme Options : Navigation (3/3)

General Settings tab

- **Disable top tier dropdown menu links**

Enable if you don't want top pages to be clickable in dropdown menus

- **Alternative scroll-to-anchor method**

Enable to improve scroll position to anchor

Theme Options

Divi Theme Options : Builder (1/5)

Classic Editor vs. Gutenberg Editor vs. Divi Builder

Classic Editor

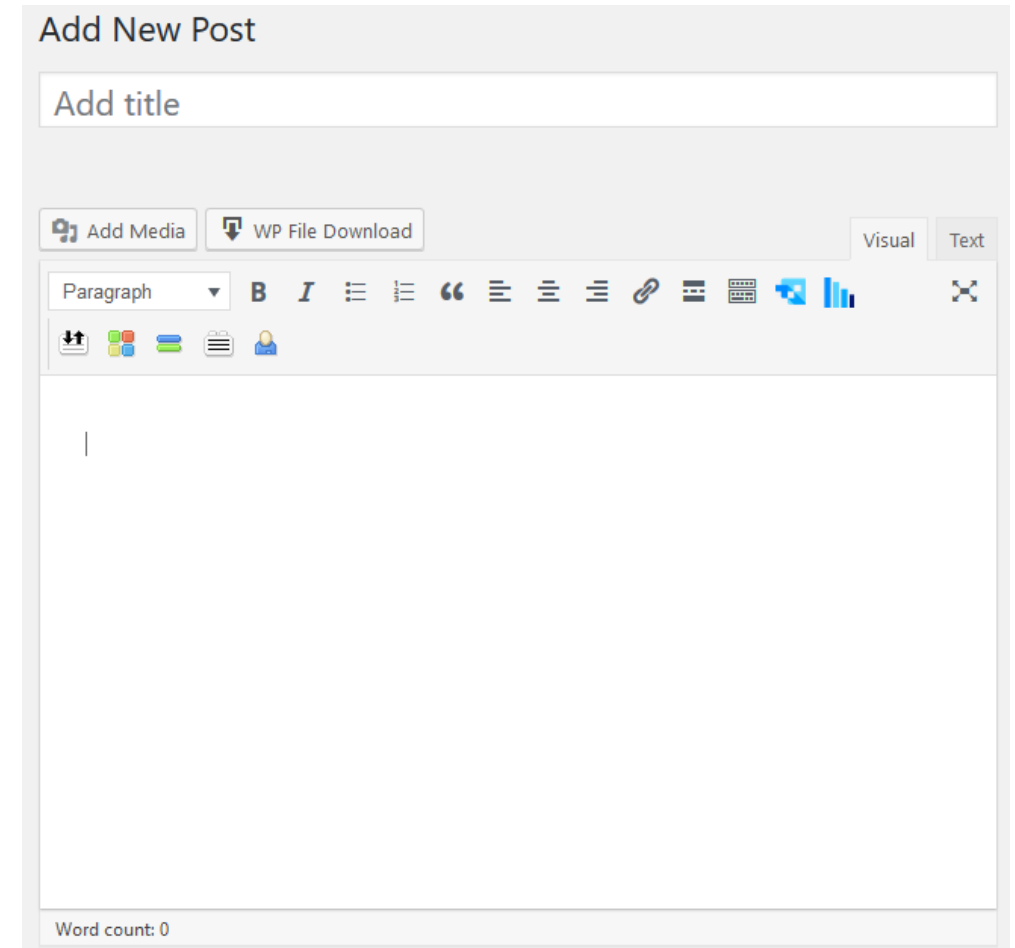
The classic editor is the editor used in Wordpress previous to version 5.

Pros

- Simple
- Lightweight

Cons

- No instant preview
- No good with complex layouts



Theme Options

Divi Theme Options : Builder (2/5)

Classic Editor vs. Gutenberg Editor vs. Divi Builder

Gutenberg Editor

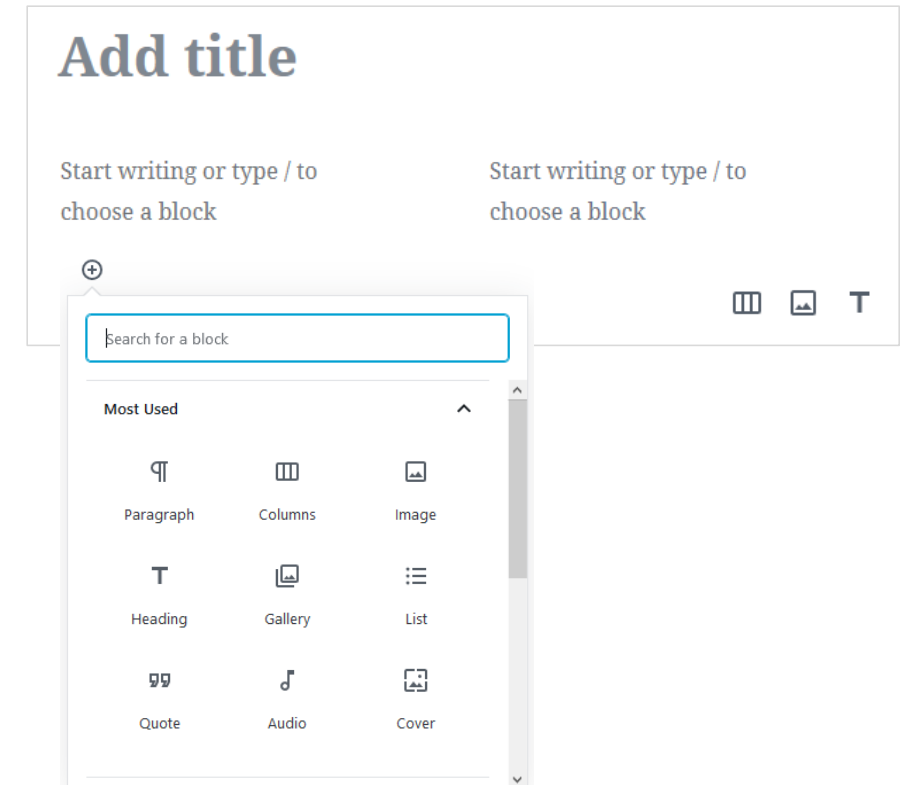
Introduced with Wordpress 5, the Gutenberg editor works with blocks, allowing plugins to better integrate their features, and allows more complex layouts.

Pros

- Plenty of options
- Easy to create columns, tabs, etc
- Better preview out of the box

Cons

- Heavier than the classic editor
- Need a bit of practice to get used to



Theme Options

Divi Theme Options : Builder (3/5)

Classic Editor vs. Gutenberg Editor vs. Divi Builder

Divi Builder

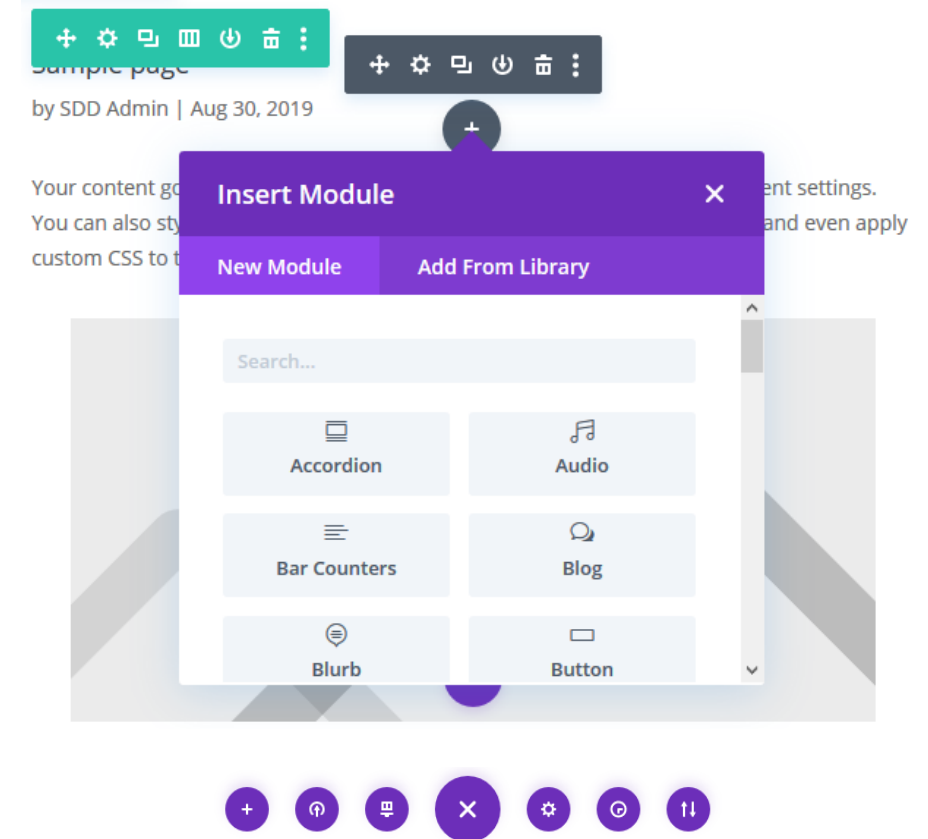
Shipped with the Divi theme, powerful but complex page editor, providing tons of options.

Pros

- Front-end editing
- Mobile preview
- Library of templates
- Pre-build layouts

Cons

- Heavy and slow
- Steep learning curve



Theme Options

Divi Theme Options : Builder (4/5)

Post Type integration tab

- **Enable Divi Builder on post types**

Select which post types you want to be able to use the Divi builder with

Post Type Integration

Advanced

Enable Divi Builder On Post Types

Posts

☐ DISABLED

Pages

ENABLED ☒

Projects

☐ DISABLED

The Divi Builder is powerful, but complex to use.

It can be useful to build complex pages (i.e. home page) but you probably want to avoid using it on daily posts, where the Gutenberg editor already provides more than enough options.

Theme Options

Divi Theme Options : Builder (5/5)

Advanced tab

- **Static CSS File Generation**

Serve CSS through static files – improves performance (recommended: enabled)

- **Output styles inline**

Kind of the opposite of the previous option (recommended: disabled)

- **Product Tour**

Provides tips on how to use the Divi Builder when first used

- **Enable The Latest Divi Builder Experience**

Use the latest improvements (recommended: enabled)

- **Enable Classic Editor**

Enable if you want to be disable Gutenberg editor

Theme Options

Divi Theme Options : Layout (1/3)

Single Post Layout

- **Which items to display in postinfo section**

Choose which items to display in the postinfo section

 Author  Date  Categories  Comments

- **Show comments on posts**

Disable if you don't want to deal with comments
(recommended: disable)

- **Place thumbs on posts**

If enabled, will show the “feature image” at the top of the post, before the content
(recommended: disabled)

Theme Options

Divi Theme Options : Layout (2/3)

Single Page Layout

- **Place thumbs on pages**

If enabled, will show the “feature image” at the top of the page, before the content
(recommended: disabled)

- **Show comments on pages**

Disable if you don’t want to deal with comments
(recommended: disable)


Theme Options

Divi Theme Options : Layout (3/3)

General settings (i.e. blog pages, archives, etc.)

- **Which items to display in postinfo section**

Choose which items to display in the
postinfo section

 Author  Date  Categories  Comments

- **Show thumbs on Index pages**

If enabled, will show the “feature image” at the top of the post, before the content