WordPress Maintenance For Beginners

Content
Pages, posts, users, links, widgets,
menus, comments, products, etc.

Media
Images, documents,
videos, music, etc.

Plugins
Function, features,
and facilities.

Theme
Form, appearance,
and style.

Peter Wooster
Silver Maple Web
pkw@silvermapleweb.com
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Introduction

WordPress is an easy to use web publishing system that is popular with bloggers and small businesses partly because of its ease of use. Despite its overall friendliness, it does need maintenance and many of the maintenance tasks require a certain level of skill.

Just like a car, it helps to know what the main parts are, what each of them does, and how to perform simple tasks like filling it up, changing a tire and replacing wipers. More complex tasks require the help of a mechanic, in the case of WordPress, a web designer, developer, or experienced site builder.

The Parts of WordPress

The Core

WordPress itself is a simple open source web system, written in the PHP programming language with a GNU Public License. This core connects your site to the outside world through the network, presents the content to the visitor, and manages content, media, themes and plugins.

Plugins

Plugins provide additional functionality to a WordPress site. This functionality can include anything from drag and drop visual editing, to SEO support. Plugins are managed using the Plugins menu in the admin and are found in the /wp-content/plugins directory.

Themes

Themes control the appearance of a site. Some themes also provide additional functionality. Themes are managed using the Themes menu in the admin. Some themes come bundled with a group of plugins to provide a complete system. Themes are found in the /wp-content/themes directory.

Media - Images, Documents, etc.

Media includes images, documents, videos, and other self-contained assets. These files are managed using the Media menu in the admin. Each item consists of a collection of files in the /wp-content/uploads directory and a hidden post in the database.

Content

Content is where most of your work should be directed if you are not a developer or designer. Content is made up of posts, pages, comments, users, links, products, orders, etc. Content is stored in the database. The post is the basic item in a WordPress site, and originally represented a blog post.

There are several built in post types including posts, pages, attachments, and comments. Developers can create custom post types such as e-commerce products and orders. Posts can be organized using categories and tags.

Site Administration, The "Back-end"

The Admin Menu

When logged in, a dark grey menu bar appears above the content of your site. This gives you quick shortcuts to some of the most frequently used part of the admin:

Information about the version of WordPress, documentation etc.

Site name - dashboard, opens the admin sidebar

Customize - opens the theme customization options

Number of updates - opens the WordPress updates page

Number of new comments - opens the comments page

New - adds a new page, post, link, user, or media item

Edit Page or **Edit Post** - opens the editor on the current page or post

other buttons installed by the theme or plugins

The Admin Sidebar

When you are in the editor, have clicked the dashboard icon in the admin menu, or immediately after logging in a dark grey sidebar appears on the left side of the screen. This contains the following standard tabs:

Dashboard

- **Home** - information and status about the site

- **Updates** - list of items such as WordPress, Plugins and Themes that require updates

Posts - blog posts

- **All Posts** - list of posts

- **New** - add a new blog post

- **Categories** - manage categories

- **Tags** - manage tags

Media - manage images and documents

- **Library** - list of media items

- **Add New** - upload media

Links - manage links to other sites

- **All Links** - list of links

- **Add New** - add a link

- **Link Categories** - manage link categories

Pages - manage web pages

- **All Pages** - list of pages

- **Add New** - add a new web page

Comments - manage comments and spam, approve and delete

Appearance - manage site appearance

- **Themes** - manage themes, download and activate
- **Customize** - adjust theme appearance, change logo and colours, etc.
- **Widgets** - assign widgets to sidebars and other widget areas
- **Menus** - assign pages, posts, links, and categories to menus

Plugins - manage plugins

- **Installed Plugins** - list of plugins, activate, deactivate, delete
- **Add New** - install new plugin

Users - manage users

- **All Users** - list of users, edit, delete, change access, change password
- **Add New** - create a new user
- **Your Profile** - update your profile, change your password

Tools - various tools, both standard and added by plugins

- **Import** - import posts and pages
- **Export** - export posts and pages

Settings - control site wide settings

- **General** - important global settings
- **Reading** - control the visitors reading experience
- **Writing** - control the creation of posts and pages
- **Discussion** - control comments on pages and posts
- **Media** - media settings, thumbnail sizes
- **Permalinks** - the format of links to pages and posts

or custom icon - Settings added by plugins

shrinks sidebar to show only the icons

expands sidebar to show the names

Logging in

During installation you set a user name and password or you received an email from WordPress to set the password on a user account created for you. These will be used to get to the administration screen of your website. Attempting to go to any administration page such as /wp-admin will ask you to log in. Be sure to use a strong password and save it somewhere safe, you may wish to use a password vault such as 1 Password or LastPass.

Never log into the admin accounts on your site from a public Wifi such as StarBucks or McDonalds. If you must access your site from such a location, login before you leave home, or set up a temporary user which you can delete when you are done.

Backing Up Your Site

After installing your site or before any code updates you should back up your site. This involves making copies of your code and data. You don't need to back up WordPress itself, but you should back up plugins, themes, media and content.

Your host may provide a backup service, which is good to have. However, they may charge a fee to recover your data, and they could go out of business. You should keep an off-site copy of your database and the wp-content directory of the file system.

Plugins such as Akeeba and Backup Buddy can do all of this for you or you can do it manually.

Backing up code and media

Well-built sites keep all their code and media in the wp-content directory, this can be zipped up into an archive using your host's file manager or the tar utility from the command line. The resulting archive file can then be downloaded to your work station or uploaded to the cloud.

The .htaccess or web.config file should also be backed up as these often contain important customizations such as url redirectts and anti hacking rules.

Backing up your content

Your content is stored in the database. You can back this up using a plugin like WP Migrate DB or by using PHPMyAdmin from your cPanel or using mysqldump from the command line.

The resulting file should be moved to your workstation or DropBox.

Updating Content

You use the admin menu or the sidebar to add and update posts and pages. It will open the WordPress editor.

The WordPress Editor

When adding or updating posts and pages the WordPress editor is the main tool. There are three versions of the editor:

• The quick editor which is available from the pages and posts list. This lets you update some attributes such as the author and title. It doesn't provide a way to update the content.

• The bulk editor which is available from the bulk actions button on the pages and posts list, even less can be done than the quick edit, but it can be done to many posts at the same time.

• The page or post editor which can be opened from the list, the admin menu or the edit link on the page or post. This is the editor which opens when a new page or post is created and is the only way to edit content,

The Editor Page

This has a title of Add New Page or Add New Post for a new item and Edit Page or Edit Post when editing an existing item. It displays a set of edit boxes in a form with a blue submit button labeled either "Publish" for a new item or "Update" for an existing item.

Screen Options

The boxes on this page are controlled by the "Screen Option" button at the top right of the page. These can hide unused fields, it is worth checking these when first using the editor. Some boxes are always displayed, e.g.. Title, Content, and Publish. There are many more editor boxes both standard WordPress, and supplied by plugins.

Editor Boxes

• Title - the page title, this is used to create the page name or "slug" and may be displayed at the top of the page, depending on the theme.

• Content - not labeled, it's the large box with buttons above. It uses TinyMCE as its editor. The buttons that appear above let you insert HTML into the content. This editor has two modes: visual and text.

• Publish - controls publication, includes the ability to schedule publication, save as a draft or publish privately.

The Content Box

This is where you will spend most of your time creating content. Most authors will work in the visual editor while most designers and developers will work in the text editor. Above the editor is a button to add media, this opens the media library and returns to the editor when complete.

The visual editor presents a view of the content showing some of the styling, headings appear larger and bold, and images are shown in the content. It's not quite WYSIWYG, but close.

The top of the editor consists of one or more rows of buttons that add HTML tags and CSS styles to the content. Most of the buttons work on the selected text or set the style to use on new text.

Editor Buttons

Paragraph ▼ shows current style and applies styles to content

B make selected text bold

I make selected text italic

create bulleted list

create numbered list

large quote mark - block quote

align selected text left

align selected text centre

align selected text right

insert or edit link to internal or external content

remove link

insert read more, text below doesn't show until link is clicked

shows and hides additional rows of buttons

ABC strike through selected text

insert horizontal rule

apply colours to selected text

paste as text, removes formatting while inserting

remove formatting

insert special character

decrease indent

increase indent

undo last change

redo last change

keyboard shortcut help

Recovering from Editing Mistakes

For simple errors, ctrl-z and the undo button will reverse the last change.

For more serious problems, WordPress has a versioning feature that is available from the revisions box on the editor. If you have saved a page or post and the results are not what you want, you can get the previous version from the revisions box. The revisions box is not displayed by default, you must turn it on using the screen options.

The revisions are displayed in reverse time order, last one first. You can compare revisions and revert to another revision.

Installing and Updating Plugins and Themes

Most plugins and themes can be installed directly from the admin pages of your site. Some require you to download the code and then install it from the admin. Be sure to backup both the database and the wp-content file directory before installing or upgrading themes and plugins.

Plugins

Plugins have their own tab on the left-hand sidebar of the admin. Click the sub-menu that says "Add New", this will give you the option to upload the plugin code from your workstation or to search the WordPress plugin repository.

Free Plugins

You should only load free plugins from the WordPress repository or a trusted developer. When you find a plugin in the repository:

- click on the "Install Now" button to install the plugin.

- After it is installed you will see an "Activate" button where the "Install Now" button was, click that and the plugin should install.

- When a plugin fails to install you will usually see a message about its problem and it will not impact your site.

- On some occasions you will get the dreaded "WSOD", a white screen that indicates that a PHP error has occurred. If this happens, restore that backup you took and inform the plugin author.

- Once the plugin is installed, test its functionality and the rest of your site

Most plugins can be updated from the Updates page in the admin. The process is similar to the installation process.

Paid Plugins

Proprietary, premium, and other private plugins are often provided with their own installation procedures or as a zip file that you must download from the supplier and then upload to your site. Some of these also need to be updated using a file obtained from the developer.

Themes

Themes are located in a tab under the "Appearance" tab in the admin sidebar. Other than that they are installed the same way as plugins. There are both free and paid themes. Unlike plugins you can only have one active theme at any time.

Changing your theme may make serious changes to the appearance of your site. The install screen provides a preview that lets you see how the site will look without actually activating the theme.

Most premium themes come with a collection of plugins bundled into them, these can be hazardous as they may conflict with plugins you have already installed on your own.

Updating WordPress

WordPress will automatically apply security updates and some hosts will do automatic updates for higher level versions. Automatic updates can be disabled by changing the wp-config.php file.

Major updates are not applied automatically by default. You may have to apply these yourself. To apply an update:

- back up your files and database

- open the admin dashboard updates tab

- click the "Update Now" button, WordPress will do the update and display a page about the new version.

- If the update fails it will either be backed out with no effect or you will get a PHP error and the white screen (WSOD). The WSOD means it's time to restore from that backup you took.

Managing Comments and Spam

If you allow comments you will get spam. There are plugins that help reduce this, various anti-spam plugins and the WordPress product Akismet. Akismet is free for personal blogs and cost about $5 per month for commercial sites.

You should set the discussion settings to require approval for comments and to reject any that contain multiple URLs. You can set the email settings to notify you when comments are posted or held for moderation.

When comments arrive you should go to the "Comments" tab in the admin sidebar and either approve, delete or mark the comment as spam. You can also reply to comments from there or from the post that received the comment. You will need to approve your own comments.

Moving a WordPress Site

Moving to a new host, same domain name

Moving a WordPress site to new hosting is not difficult if the domain name is not changing. The steps are:

• install WordPress on the new host, be sure to use the same database table prefix used by the current database. You can find this in the wp-config.php file.

• back up the database using mysqldump, PHPMyAdmin or a backup plugin.

• archive the wp-content directory to a .zip or .tar.gz file

• update the wp-content directory on the new site using the archive file

• update the database on the new site using the database backup and the hosting's database utility

• change the name servers (DNS) or zone file A record to point to the new hosting

• wait for the DNS change to propagate.

• If you need to get to the site before the DNS has propagated you can change your "hosts" file to override the DNS. This is easy, add a line with the new IP address and the domain to /etc/hosts on the Mac or Linux or Windows\System32\drivers\etc\hosts or recent versions of Windows. On windows you will need to run Notepad as administrator to edit this file, on the Mac or Linux use "sudo vim /etc/hosts".

Moving to a new domain name

Moving a WordPress site to a new domain name is similar to the process of moving to a new host. The main differences are that you can set up the new domain before you do the move and that you need to update any URLs in the database. The steps are:

• install WordPress for the new domain, see the installation instruction above, be certain to use the same database table prefix as the existing site.

• archive the wp-content directory

• back up the database using a migration plugin like WP Migrate DB. You will need to provide the new domain and the website directory (Document Root) to the plugin.

• If you use a plain SQL backup the URLs will not be updated. This will cause a lot of problems when the old site is no longer available. Note that these cannot be updated using a simple search and replace because of records containing "serialized data" which includes a byte count for the items. Migration utilities like the WP Migrate DB and Duplicator plugins as well as the Interconnectit.com Search and Replace tool take care of this.

• replace the wp-content directory from the archive

• update the database using the database backup.

Deleting a WordPress Site

Once you've moved your site or if you are shutting the site down you need to remove the old version. This is not optional as Google will see the old version as "duplicate content". If you want to keep the old version there is a setting in the Reading settings to discourage search engines.

The steps to delete a site are:

• take a backup of the database, wp-content and .htaccess

• if the site was installed using the cPanel installation utility use that utility to delete the site

• if it was installed manually:

- drop the database schema, you can find this in the wp-config.php file

- delete the WordPress installation from the web root (public_html or www) on the sever

- remove any Virtual Host, or Add on Domain from your hosting

cancel the domain at your registrar if you are no longer using it

Development and Staging Environments

Development and staging environments are useful for anyone who codes themes and plugins or experiments with themes and plugins on a site. These are hazardous activities which can lead to the complete loss of the site if there is a bug in your code or some plugin you were testing.

Development Environment

This is a copy of the site that runs on your local PC or Mac. It will use a system like MAMP, WAMP or the native Apache and PHP services available on a Mac or Linux. There are systems that allow these environments to be set up easily, they are quick, but are not always an accurate copy of the system the site will finally run on. Even MAMP isn't all that close, but it usually is close enough. The live system may be using Nginx. Be sure to use the same version of PHP as the live system.

Staging Environment

A Staging or Quality Assurance site is a closer approximation to production. It runs on a similar server to the real site and has its own domain, possibly a subdomain of the live site. This is a site that you can show to a client to get sign-off. Some hosting services such as SiteGround and WP Engine provide staging systems and utilities to migrate easily between Staging and Live.

Migrations Between Staging and Live Sites

Migrations from Live to Staging or Development are straight forward and only involve changing the domain in the database and restoring the backup and files. When moving from Development or Staging to Live you must be careful not to wipe out recent blog posts or e-commerce activity. This can become quite complex, as you may need to transfer some posts and not others or recreate them by hand. If the site involves e-commerce these kind of transfers are very difficult and should be avoided.