

## WordPress Course

### **Introduction**

WordPress started in 2003 by Matt Mullenweg, WordPress has quickly become the world's most popular content management system (CMS) platform. Some of the largest companies in the world such as Pepsi, Samsung and Ford use WordPress as their software to operate their sites.

What is WordPress?

WordPress is an online, open source website creation tool written in PHP. But in non-geek speak, it's probably the easiest and most powerful blogging and website content management system (or CMS) in existence today. WordPress is highly customizable, and has literally thousands of *plugin* pieces of software so you can use your site for just about anything.

### **The Benefits of Using WordPress**

#### *1. The software is free.*

How many times have you been given something for free that is fully functional and ready to use? And if you want to upscale your site a little with premium themes and plugins, you're still going to save tons of money over what you would pay for a custom designed site.

#### *2. It's easy to use.*

Seriously. If you can send an email, use Microsoft Word, or set up a Facebook account, then you can use WordPress. In other words, if you've already used a computer, chances are you are already skilled enough for the WordPress basics. And even better, it's hard to mess it up. You can easily add and delete pages and posts without accidentally messing up the overall design of your site.

#### *3. You are in control.*

Owning your own site, and being able to make changes to it yourself, is the ultimate in online freedom. You don't have to rely on an expensive web designer to make changes or fix a tiny error for you whenever they can squeeze you in. You're in control of your site—and your wallet.

#### *4. Search Engine Friendly*

The way WordPress is organized and structured makes it friendly for search engines such as Google and Yahoo! to recognize it. Traffic from search engines is crucial to your website because it's free and the visitors tend to be more loyal because they are looking for something specific.

#### *5. Themes & Plugins*

There are thousands of free and premium templates and plugins available for WordPress with hundreds created each day. There are lot of free and premium themes, that are customized, give companies a unique look with half the cost. Plugins are features you download for your blog. There are literally thousands of them that range from a shopping cart system to a poll. The combination of both a customized theme and innovative plugins allow for a great-looking functional site.

## 6. Huge support of community

WordPress isn't just a software, it has become a community. Some might even say a movement. In fact, WordCamps (1-3 day training sessions) have sprung up from grassroots efforts. They are informal, community-organized events put together by other WordPress users just like you. You'll meet people of all backgrounds, ages, and nationalities at WordCamps. Plus, there are thousands of people and hundreds of resource and tutorial sites set up just to help you with your WordPress site.

### WordPress.com vs. WordPress.org

If you're new to WordPress, you might be wondering about the difference between WordPress.org and WordPress.com. The one major difference between WordPress.com and WordPress.org is *who's actually hosting your website*.

With WordPress.org, *YOU* host your own blog or website. WordPress.org is where you'll find the free WordPress software that you can download and install on your own web server. Getting your WordPress site set up involves purchasing a domain name, buying a hosting plan and then installing WordPress on your server. Most hosting companies provide instructions or services to install WordPress for you.

WordPress.com, on the other hand, takes care of all of the hosting for you. You don't have to download software, pay for hosting, or manage a web server.

### Pros and Cons of WordPress.com vs. WordPress.org

Both WordPress.org and WordPress.com have pros and cons, depending on your needs. If you're not interested in paying for your own hosting, managing your own web server or paying someone else to handle that for you, you'll probably want to use WordPress.com. It's free and easy to set up and you have lots of options for customizing your site.

A few of the cons of using WordPress.com include that your domain will, by default, include "WordPress.com." You also can't upload any custom themes, plugins or modify the PHP code behind your site. While WordPress.com is free to set up, they do offer several premium upgrades, including domain name registration (if you don't want WordPress.com in your domain name), the ability to upload videos and the option to use their premium themes.

Using the downloaded version of WordPress from WordPress.org opens up more control and flexibility for your WordPress site, but it also means more responsibility. Using a self-hosted version of WordPress means you can use your own domain name, upload and install themes and plugins, edit the code behind your site and have access to your site's database (or files). Most of the showcase sites you see on the WordPress site showcase are the self-hosted version of WordPress, since many of them have unique functionality or a custom made design.

### Getting Started

In this course focuses on using the self-hosted version of WordPress available at WordPress.org, here's a quick overview of how to get started:

1. Purchase a domain name.
2. Purchase a hosting plan from a reputable hosting company that specializes in WordPress sites.
3. Install the WordPress software on your server (Most hosting companies provide instructions or services to install WordPress for you.)

## ***Purchasing Your Domain Name***

The first thing you need in order to have a website is have a domain name. A domain name is what you type in to a browser window to visit a site, such as <http://www.mysite.com>. A domain name is how anyone from anywhere in the world can access your site. If you've already registered your domain name, then you're good to go for the next step—hosting.

If you haven't registered a domain name, the easiest way is to do it as you sign up for hosting. But you can also purchase (register) your domain name before you are ready to sign up for a hosting account.

## ***Setting Up Your Hosting Account***

In order for your website to appear on the web, it has to be hosted somewhere. Think of hosting like a storage facility. It's a place for you to store all of your stuff (your website) on the web. The more stuff you have (the bigger your site) the more storage space you need.

There are *many* web hosting companies that offer a wide variety of hosting plans. Just note that with hosting you get what you pay for. Be careful about choosing a cheap shared hosting plan, as many hosting companies overload their servers, which will impact the speed of your own site.

## ***Installing WordPress***

The final step is to install WordPress on your server. Most hosting companies offer thorough instructions on installing WordPress or services to install WordPress for you.

Using a quick-install service is a simple way to get your WordPress installation up and running, but the downside is that it does leave some security holes. For that reason, you may want to consider installing WordPress manually.

### **What are the benefits of doing a manual installation?**

- It prevents the WordPress database tables being installed as a default, with default labels. These default labels can make your site more vulnerable.
- It allows for full customization of the wp-config.php file, which opens up enormous potential in WordPress.
- It allows you to work within the “best security practices” for your WordPress site.

## ***Logging Into Your New WordPress Site***

Once WordPress has been installed on your web server, you can access your WordPress login page from two different URLs.

### ***1. Your WordPress Login URL***

The first way to access your WordPress Login URL will be in this format: <http://yoursite.com/wp-login.php>

### ***2. You can also log in from: <http://yoursite.com/wp-admin>***

From your WordPress login screen, you'll enter the username and password that you set up during the WordPress installation process. If you've forgotten your WordPress login password, you can click the “Lost Your password?” link to retrieve it via email.

## Exploring the WordPress Dashboard

Once you've logged in to your WordPress site, you'll land here, the WordPress dashboard. The WordPress dashboard allows you to control all of the behind-the-scene details of managing your site. Once you find your way around the dashboard, you'll realize it's really easy to use and navigate.

First, we'll take a look at the dashboard home screen. After you first log in, you'll see a top Welcome to WordPress section with some quick links to help you get started. You can always dismiss this box using the link in the top right corner.

The next section is the At a Glance section. Here you'll see the number of posts and pages for your site's content. You'll also see discussion information for comments, like the total number of comments and the number in moderation. In the At a Glance section, you'll also see what WordPress theme you're currently running on your site plus your current version of WordPress.

The Activity section shows recently-published posts, pingbacks and recent comments. From here, you can quickly approve comments, reply back, mark as spam or send to trash.

If you scroll back up to the second column, you'll find the Quick Draft section of the WordPress dashboard. QuickPress will allow you to save a draft of a post straight from this screen. Below this section, you'll see a list of other post drafts. Once you start creating posts and if they're saved as drafts, the three most recent drafts you've started will be visible here.

The last section is the WordPress News section. These are updates from the official WordPress project. If you'd like to customize what sections you see from the WordPress dashboard, visit the Screen Options tab on the top right side of your screen. Click the arrow to expand this section and you'll see checkboxes for each of the sections usually included in the WordPress dashboard. To remove any of the sections, just unclick the checkbox beside the section you'd like to hide. You can also choose the number of columns for the screen layout, too. If you return to the dashboard home, you can also expand each of the sections by clicking the arrow to the right. You can also drag and drop the boxes to change the order.

### Left-hand Navigation Menu

In addition to the WordPress dashboard home screen, the other major component of the WordPress dashboard is the left-hand navigation menu. This navigation menu provides links to all of the WordPress administration screens for posts, the media library, pages, comments, appearance options, plugins, users, tools and settings.

We'll explore the rest of these menu items in more detail in the upcoming chapters.

If you ever find yourself needing help, just click the Help tab in the upper corner. Click the arrow to expand and you'll now see helpful information that walks through the overview, navigation, layout and content of the WordPress dashboard. From here, you can also find a link to the WordPress.org Codex documentation on the dashboard and support forums.

### **Using the WordPress Admin Bar**

The WordPress admin bar is simply a shortcut area that allows you to access site management controls on the front end of your WordPress blog or website.

The WordPress admin bar appears above your site if you are logged in to your WordPress dashboard. This is to allow for easy editing and site management directly from your site without having to jump back and forth

between the *front end* (what visitors see of your site) and the *back end* (your WordPress dashboard). It provides some handy shortcuts to access parts of your WordPress installation without having to find them in the left-hand navigation menu.

Once you've logged in to your site, locate the top bar on the top of your screen. On the far left side of the WordPress admin bar, you'll see the WordPress logo. If you hover over this logo, you'll see links to WordPress-specific information. These are great quick-links if you ever need to take a look at WordPress documentation, visit the support forums or leave feedback.

To the right of the WordPress logo, you'll see the name of your site. Hover over this and you'll see a submenu to visit the front end of your site. This is how your site looks to visitors. The next section gives a quick reference for comments.

The last section on the left side of the admin bar is the +New link. If you hover over this link, you'll see a submenu that will quickly take you to the add new screen for post, media, page and user. All of these things can also be done from the left-hand navigation menu of the dashboard, but this link is great for getting these tasks done quickly.

On the far right side of the screen, you'll see "Howdy, your name." Hover over this section to see the submenu to edit your profile or log out of the site.

### The WordPress Admin Bar Front End View

By default, once you've logged into your WordPress site, the admin bar will also be visible to you from the front end of your site. If you hover over the name of our site, then click visit site, you'll see the front end of your site.

From this view, the WordPress admin bar changes a bit. By hovering over the title of your site, you'll see links for the dashboard, which will take you back to the dashboard home, and links to take you to themes, customize, widgets, menus, background and header. Again, all of these sections can also be found from the left-hand navigation menu in the WordPress dashboard, but this is a great quick reference.

This view also adds a search function. Click the magnifying glass to open the search prompt.

### How to Turn Off the WordPress Admin Bar

Most people find the WordPress admin toolbar useful, but some people may want to turn the WordPress admin bar off from the front end of the site. Remember, the WordPress admin bar is only visible to you when you're logged in to your site.

To turn off this view, click the Edit my Profile link. Now, from this screen, you'll see a check box to Show Toolbar when viewing site. Simply uncheck this box to turn this view off, then scroll to the bottom and click Update profile.

If you return to the front end of your site, the WordPress admin bar will be no longer visible. If you decide later that you'd like to turn the admin bar back on, just return to your edit profile and check the box to show the toolbar again.

## Exploring WordPress Settings

From the WordPress dashboard, locate the Settings menu. If we hover over this menu, you'll see a submenu appear with options for various WordPress settings including:

- General
- Writing
- Reading
- Discussion
- Media
- Permalinks

### WordPress General Settings

To get started, expand the WordPress settings menu. Click **General Settings**.

The first thing you'll notice in General Settings is your **Site Title** and **Tagline**. You'll want to make sure these titles match your site because your site title will be visible in Google search results. By default, WordPress includes "just another WordPress site" as your site's tagline. You'll probably want to update this tagline to be descriptive of your site, because the site tagline will also show up in Google search results for your site.

The next section is the **WordPress Address (URL)**. For the site address URL, you can enter the URL address if you want your site homepage to be different from the directory where you installed WordPress. In most cases, it's best to leave these two URLs alone.

Next you'll see the **E-mail Address** that's used for admin purposes, like new user notifications.

Next are settings for **Membership**. With WordPress, you can allow anyone to register for your site.

The **New User Default Role** is by default set to subscriber. You'll probably want to leave this setting, since you don't want to grant administration privileges to just anyone that registers for your site.

Next is **Timezone**. Scroll through the list to select the city in the same timezone as you then select your preferred date format. Keep in mind this date format will be visible on blog posts. If you have any questions about this format, you can check out the documentation on date and time formatting by clicking the link below this section.

The next three areas **Date Format**, **Time Format** and **Week Starts On**, allow you to customize your date and time settings.

Last is **Site Language**. You can select your language from the dropdown list.

Once you've updated or change these settings, click **Save changes**.

### WordPress Writing Settings

Next up are **Writing Settings**. From the left-hand navigation menu, click to open the Writing Settings page. All of the settings on this page apply to writing and publishing content for your site. The top section controls the editor within the WordPress dashboard, while the rest control external publishing methods.

In the first section, you'll see options for **formatting**, including settings for **default post category** and **default post format**. When you make your selection in these dropdowns, new posts will automatically have the selected

category or post format applied. Post formats are simply a way WordPress can format your posts, depending on if your theme provides styling for that particular format. We'll cover more on categories in a later chapter.

The next section is the **Post via e-mail section**. The **Post via email** settings allow you to send an email to your site with post content. To use this, you'll need to set up a secret e-mail account with a POP3 access, and any mail received at this address will be posted. For this reason, it's a good idea to keep this address secret.

The last section is for **update services**. When you publish a new post, WordPress will automatically notify the update services listed here. For more information, check out the Update Services link in this section.

Again, click the **Save Changes** button at the bottom of the screen for your new settings to take effect.

### WordPress Reading Settings

Now it's time for **Reading Settings**. This screen contains the settings that affect the display of your site's content.

From here, you can choose what the **front page displays**, either your latest posts or a fixed/static page. Once you've created a few pages, those pages will be listed in the dropdown as options for your front page and where to display your posts.

In the next section, you can set the number of pages your **blog pages show at most**. This setting will limit the number of posts shown on a single page of your blog, before a user has to use a "previous" or "next" link to see more posts.

The next section is where you can control the display of your content in RSS feeds, including the number of recent items **syndication feeds show** and whether to show full text or a summary.

The last section is for **search engine visibility**. If you'd like search engines to ignore your site, click the checkbox next to **Discourage search engines from indexing this site**. This might be a helpful setting if you're currently developing your site and you're not ready for it to be indexed by search engines.

Click the **Save Changes** at the bottom of the screen to update these changes.

### WordPress Discussion Settings

**WordPress Discussion Settings** provide a ton of options for the management of comments and controlling links to your posts/pages.

The first section is for **default article settings**. The first setting deals with links you make to other blogs. The second deals with pingbacks and trackbacks, or links back to your blog. The third setting is the default article settings that allow people to post comments on new articles. If you'd rather not allow people to comment on your posts, uncheck this box.

In **Other comment settings**, you can choose the guidelines for how people post comments and how their comments are handled.

Next, in the **email me whenever** section, you can choose to be emailed when someone posts a comment or when a comment is held in moderation.

The **Before a comment appears** section deals with how comments are published. Here you can choose if an administrator must always approve comments or to publish automatically if the comment author had previously posted a comment.

In the **Comment Moderation** area, you can customize how a comment is held based on the number of links. In this box, you can also add words, names, URLs, emails or even IPs to filter comments into the moderation queue. Both this section and the **comment blacklist** section are great for helping to defend your blog against spam comments.

Next, take a look at the **avatar** section. An avatar is a profile image you can have assigned to your email address when you comment on avatar-enabled sites.

Here you can enable the display of avatars for people who comment on your site, filter by their rating or chose a default avatar for people that don't already have a custom one of their own. If you don't already have an avatar, visit [gravatar.com](http://gravatar.com) to upload your own.

Click the **Save Changes** button at the bottom of this page.

### WordPress Media Settings

The **Media Settings** page allows you to set maximum sizes for images inserted into the content of a post. These settings are great for saving time if you always want images to be the same size or if you want to apply default settings for medium and large image sizes.

The **Uploading files** option allows you to select whether or not your uploads are organized into month and year based folder.

Click **Save changes**.

### WordPress Permalink Settings

*Permalinks* are the permanent URLs to individual pages and blog posts, as well as category and tag archives. Basically, a permalink is the web address used to link to your content that is permanent, and never changes—that's why they're called "perma"-links.

The **WordPress Permalink Settings** screen allows you to choose your default permalink structure. You can choose from common settings or create custom URL structures.

By default, WordPress uses web URLs, which have question marks and lots of numbers in them. You'll probably want to change your permalinks here to another structure to improve the aesthetics, usability, and forward-compatibility of your links, and to make them more search engine-friendly.

If you'd like more information on setting up your permalinks, click the **Help** tab at the top of the screen. Here' you'll get an overview of common settings and structures to help select your permalink structure.

### **WordPress Posts vs. Pages**

When it comes to creating content for your WordPress site, you have the option to choose between creating either a *post* or *page*. Both have their respective uses and can add dynamic elements to your site.

*WordPress post* is what makes up the 'blog' aspect of your site.

- These are generally news or informational updates about a certain topic.
- Posts are listed in reverse chronological order and can be tagged, categorized and even archived on your site.
- WordPress posts are what make up the RSS content of your WordPress blog. So, when someone subscribes to your RSS feed, your posts will be the content that's delivered to them.



- Think of the posts as the news portion of your site. They're dynamic and constantly changing the content your end users see.

*WordPress Pages* are similar to posts in that they have a title and body text, but they are different because:

- They are generally reserved for static content or information.
- Examples of this would be an *About Me* or *Contact Us* page.
- Pages aren't listed by date and can't be categorized or tagged like WordPress posts.
- Pages can have a hierarchy, which means you can nest pages under other pages by making one the "Parent" of the other, thus creating a group of pages.
- Due to their static nature, pages aren't included in RSS feeds and won't have date or time publishing.

### Using Posts & Pages

Generally posts will be used for your blog content and pages will be used for standalone information that isn't updated often. For example, an organization might use posts to handle news updates, press releases, job listings or new products. But they'd use pages to list "about" information, services, contact info, team bios, locations or bylaws.

WordPress is flexible and you can use posts and pages however you want, but this gives you a basic overview of how they work.

### **Creating a WordPress Post**

To get started creating your first WordPress post, locate the **Posts** menu in the left-hand side of the WordPress dashboard. You can either hover over the Posts link or click to expand it to reveal the submenu.

The **Add New Posts** page can also be found from the **+New** link in the WordPress Admin Bar. Click the **Add New** link.

Now you'll see the **Add New Post** page where you can create your first post.

The first box is where you'll want to enter the title of your post.

Next is the **post formatting section or post editor**. This is where you'll actually type the content of your post. If you look on the right side of the box, you'll see two tabs.

There are two modes of editing posts: **Visual** and **Text**.

The **Visual** tab will bring up the visual WYSIWYG editor. WYSIWYG just means "what you see is what you get."

Here you'll see a formatting toolbar with lots of options for formatting your posts. If you're familiar with Microsoft Word or any other word processing software, most of these icons should look familiar.

If you click the **Text** tab, this will reveal a plain-text HTML version of the post editor. This version of the post editor is for editing the HTML code of your post. For most users, the Visual editor is the easiest way to write posts.

At the top of the right column on this screen you'll see the **Publish** box. Here, you can save your post as a draft if you'd like to save it for later. If you click the **Preview** button, you can get a preview of how the post will look once it's published.

The **Status** of the post will show if the post has been published, saved as a draft, if it's pending review or if it has been scheduled.

The next two links show the visibility of the post or what visitors will be able to see your post. The **Publish** line shows whether the post will be published immediately or at a later date.

The next section are for **categories** and **tags** assigned to your WordPress post. We'll cover these two topics in more detail later. If you'd like to change the screen options for your post editor, just click the **screen options tab** in the upper right hand corner. Expand this to reveal all the options that can be displayed on the post editor screen. Again from the post editor, you can also drag or drop the order of these boxes to customize how you want them arranged on the page.

If you ever need help while you're on the Add New Posts page, just click the **Help tab** in the upper right corner. From here, you'll be able to get a reminder for how to customize your post display, tips for adding a post title and using the post editor, inserting media and settings for publishing and discussion.

### Adding Links in WordPress

The WordPress post and page editor makes it easy to add hyperlinks to other web pages from your content.

1. From the WordPress post or page editor, select the text that you want to be hyperlinked.
2. Once you have that text selected, click the hyperlink button in the toolbar.
3. This will bring up a box where you can enter the URL of your hyperlink and a title to be displayed on hover. You can also click this checkbox to open the link in a new tab.
4. If you'd rather link to existing content on your website, just click to expand this section. Now you'll see a search bar to search your site and a list of existing posts or pages. Clicking on one of the items in the list will change the hyperlink URL above.
5. Once you have your hyperlink URL ready to go, click the **Add Link** button. Now your selected text will have a link.
6. To remove the link, select your text again and click the unlink button. Now you'll see that your link has been removed.

### Adding Images to Posts & Pages

Using a visual element like an image or photo is a great way to spruce up your post or page content.

1. Determine where you'd like to insert your image in your post or page. Above the Post editor toolbar, you'll see an **Add Media button**. Click the Add Media button and you'll see the **Insert Media box**.
2. Your WordPress site uses a media library to store all of your media like images and videos. From this box, you can choose to either upload a new file or use an existing file from the media library. To upload an image, click the **Select files button**. Find the image you'd like to use and click open.

3. Now that your image has been uploaded, you'll see it has been added to the media library. On the right side of this box, you'll see the attachment details for this page. Here you can change the **Title**, **Caption**, **Alt text** and **Description**.

You can also choose the **alignment** of the image (such as center, left or right), where the inserted image should link to, the actual **URL of the image** and the **size** of the image.

4. Make sure the image has a checkbox and click the **Insert into post** button. Now you'll see your image has been added to your post.

5. If you click on this image, you should see two boxes appear in the upper left-hand corner of the image. The first is the image icon. If you click that icon, you'll now see another box open for editing the details of the image. Here you can change the size of the image based on percentages (which can be a handy tool for resizing) or you can update the title, alternative text, the caption and link URL. You can also select this image to link nowhere, or to link to the actual image file.

6. If you click the advanced settings tab, you'll see the URL of where the image file is hosted on your site, the actual width and height of the image in pixels, the CSS Class, styles and image properties that add padding around the image.

7. Return to the image in your post. The next icon in the upper left corner will delete the image out of the post. If you click the **Add Media button** again, you'll see the same insert media box. On the left side of this box, you'll see options to create a gallery and set the featured image. Once you have more images in our media library, you'll be able to add an entire gallery of images into the post.

The featured image of the post is sometimes used by your WordPress theme. Go ahead and choose this image as your featured image and return back to the post editor. Now, you can preview the post and see that our image has been added.

### Using the WordPress Media Library

The **WordPress Media Library** contains all the files you've uploaded to your WordPress site, with the most recent uploads listed first.

To visit your WordPress Media Library, expand the Media menu from the WordPress dashboard. The Media Library page will show all of the media items you currently have in your media library.

To add a new media item to your library, click the Add New link. From here, upload a new image. Once your image has been uploaded, you'll see it has been added to the library.

### *Editing Images in the WordPress*

Media Library One of the neat features of the WordPress media library is the ability to edit images. Click on an image, and then click the **Edit Image button**. Now, you can crop, rotate, flip or scale the image.

For example, you can rescale this image and then click the **Save button**. Now, click the **Update** button.

### *WordPress Media Library Multi-File Uploader*

If you have more than one file to upload at once, you can easily switch to the multi-file uploader. Now, just drag and drop multiple files here to be added to your WordPress Media Library.

## Formatting WordPress Posts

In this section, we'll be covering some of the basics of formatting your WordPress posts with the built-in WordPress post editor.

The majority of your formatting options can be found in the **Post Editor Toolbar**. If you've ever used a word processing software such as Microsoft Word, most of these icons should look familiar.

To get started formatting your WordPress posts, visit **Posts > Add New** or **Posts > All Posts** and select the post you'd like to edit.

The formatting icons included in the WordPress post editor include:

- In the first row of the toolbar, we have options to **bold, italicize or strikethrough text**. To bold text, just select the text you'd like to format and click the bold button. You'll see this text has been bolded.
- The next two icons are for **bulleted and numbered lists**. If you'd like to add a list to a post, just select the text, then click that icon.
- The **quotation mark icon** is the block quote feature. By default, this will add an indentation and italicized style to your selected text. (Note: your WordPress theme controls how block quotes are styled on the front end of your site.)
- Next are **alignment options**. You can choose to align left, center or align right.
- The next icon is the **insert more tag**. This will change how much text your blog page displays with a read more link.
- If you'd prefer to write your posts in **distraction free mode**, click this icon. This will take you to full-screen writing mode similar to using a Word processing software. To exit out of this mode, we'll click "exit full screen."
- If we click the **Show/hide the kitchen sink**, another line of formatting options will be revealed. Here you can add **heading styles** to your text, **underline text** or set a **full alignment**.
- If you decide you'd like to change the color of your selected text, just use this icon to select the color.
- The next two icons are for **pasting text** — either as **plain text** or from **Microsoft Word**.

If you ever get stuck using your formatting icons, you can simply hover over the icon to see the name and function.

## Scheduling WordPress Posts

Scheduling your WordPress posts is an easy way to control when your content is published. With the built-in WordPress post scheduler, you can add a time to publish.

This WordPress posts scheduling feature is found in the **Publish box** on the upper right side of the post editor page.

To schedule a post for publication, click the edit link next to **Publish Immediately**. You'll now see a drop-down option to select the **month, date and year** to publish the post, even the exact **hour and minute**.

For example, if you'd like to publish this post at 8 a.m. tomorrow, select tomorrow's date, set the time for 8 a.m., and click **Ok**. You'll now see the **Schedule** button has appeared.

Click the **Schedule** button and you'll see the status of this post has changed to *scheduled* with details for the exact date and time it will be published to your blog.

If you change your mind and want to publish this post immediately, click the **Edit link** next to the scheduled publish time. Just update the time to today's date and the current time and this will immediately publish the post.

## WordPress Categories & Tags

WordPress **categories** and **tags** are a way to add an organizational structure to your WordPress posts.

WordPress categories are basic ways for you to organize your posts into different categories, such as topics.

For example, when writing a post, think of the wider topic of the post. If you plan to write more posts about this topic in the future, you'll probably want to group these posts together.

From the post editor page, find the **Categories** box.

### Adding a New Category

If you don't have any categories yet, click the + **Add new category** link. Add a new category and click **Add new category**. You'll then see your new category has been added to the list of categories.

To assign a category to a post, click the checkbox next to the category.

Another way to manage post categories is through the **Posts > Categories** link in the WordPress dashboard navigation menu. Clicking the Categories link will display the Categories page. From here, you can see all your categories on the right, and where to add new ones.

### Category Slug

The **Category Slug** is the URL-friendly version of the category. It is usually all lowercase and contains only letters, numbers and hyphens.

### Category Hierarchies

Categories, unlike tags, can be nested into hierarchies. For example, you might have a Jazz category, and under that have children categories for Bebop and big band.

### Category Description

The description section is a place for you to add more details about the posts assigned to that category. Some WordPress themes may show this information.

### WordPress Categories vs. Tags

What's the difference between categories and tags? Think of your site like a book. Categories are like the Table of Contents and tags are like the terms in the index.

## Creating a WordPress Page

Creating a WordPress page is very similar to creating a post. Just remember that pages are intended for static content.

1. To get started adding a new page to your WordPress site, find the **Pages** menu in the WordPress Dashboard Navigation menu. Click **Add new**. The WordPress page editor looks nearly identical to the post editor, except for a few different boxes located on the right side of the screen.
2. Add the **title** of the page, like *About*. Note: If you have pretty permalinks set up, the title of your page will also be the URL slug.
3. Next, add some **content**.
4. The **Publish** section of the page editor is exactly the same as for writing posts. When you're ready to publish, you can either publish immediately, save this as a draft, or schedule the page to be published later.
5. The **Page Attributes** section applies a parent page and template to your new page. For the Parent section, you can arrange your pages into hierarchies. For example, you could create this new page with additional pages under it. There are no limits to how many levels you can nest pages.
6. Some WordPress themes have custom page templates, so the next **Template** section allows you to apply a template to your new page.
7. The **Order** box allows you to order your page numerically. Pages are usually ordered alphabetically, but you can choose your own order by entering a number in this field.
8. **Preview** the page one last time, then click **Publish**. You've added a new page to your WordPress site.

## Applying a WordPress Page Template

Some WordPress themes include page templates that change the way your pages are formatted on the front end of the site. By using page templates, your theme changes how your pages look and where certain page elements are located.

1. To add a WordPress page template to a page, **edit** or **add a new page** from the **Pages** menu located in the WordPress Dashboard.
2. Find the **Page Attributes** section. In this section, you'll see a drop-down list for available page templates. Depending on your WordPress theme, you'll see your specific page template options in the drop-down menu.

For example, for this WordPress theme, you have an option to select the *Default template*, a *Front page template* or a *Full-width page template with no sidebar*.

## Previewing your WordPress Page

Template To test out how each of these templates would change the look of the page, select a page template. Now, you can **preview** the changes to this page and decide whether or not to apply this page template to the page.

## Publishing the Page

Once you've selected the page template to apply, just make sure it's been selected and click **Publish**.

## Using WordPress Plugins

WordPress plugins are bits of software that can be uploaded to extend and expand the functionality of your WordPress site.

Since WordPress is open source software, these are all third party tools that add-on to what WordPress can do. They're easy to download and install. Some are premium (there is a fee to purchase them) and others are free. Plugins can do things like improve your search engine optimization, display related posts in your sidebar, do complete backups of your WordPress site (BackupBuddy) or create stunning web forms quickly and easily (Gravity Forms).

You can add just about any functionality to WordPress with plugins. The WordPress Plugin Directory is a repository of free plugins that have been (somewhat) vetted. There are currently more than 40,000 plugins in the WordPress directory, so there are a lot of options.

### Free vs. Premium WordPress Plugins

As we just mentioned, there are tons of WordPress plugins available for free download from the WordPress.org Plugin Directory.

There are also *premium or paid* WordPress plugins.

*Why would you want to pay for a plugin? Well, there are several reasons:*

- While there are thousands of plugins available for free from the plugin directory, paid plugins usually offer a full time support staff and developers that work on maintaining the security and compatibility of plugins with the latest version of WordPress, as well as with other themes and plugins.
- Most of the time, plugins play nicely with the core of WordPress and with other plugins, but sometimes a plugin's code will get in the way of another plugin, causing compatibility issues. With a paid plugin, it's just nice to know you have support staff that can help you out if anything goes wrong.

## Installing WordPress Plugins

Installing plugins on your WordPress site is a simple process.

### Download & Upload Method

*Note: If you're using premium plugins from a third party source, they will usually come as a .zip file. You'll need to use the download & upload method to install the plugin zip file on your site.*

1. To install a plugin on your WordPress site, locate the **Plugins** menu after logging in to your site's WordPress dashboard. Expand this menu.
2. To upload a new plugin, click the **Add New** link.
3. Click the **Upload Plugin** button, **locate your plugin zip file** and then click **Install Now**. Then, click **Activate**.

### Search & Install Method

You also have the option to search for plugins to install from the WordPress.org Plugin Directory, directly from the Add New page. Click the tabs on this page to see featured, popular, newest and plugins you've marked as favorites.

1. Use the search bar to search for the plugin of your choice.
2. Click the Install Now button.
3. Once the plugin is installed, just click Activate.

### Manual Installation Method

You can also add plugins manually by uploading them with FTP software. This is more complicated and not for the novice user. You'll need to download the plugin file to your computer and unzip it. This will give you a folder on your computer with all the plugin files. Then, using an FTP program, upload the plugin folder to the wp-content/plugins folder on your site. Then go to the Plugins screen and you can find your new plugin in the list. Click 'Activate' to get started.

### More Plugins Menu Options

On the **Installed Plugins** page, you'll also see a list of all the plugins currently installed on your WordPress site. Some plugins come bundled with your WordPress installation, like Akismet, a plugin that protects your blog from comment and trackback spam, and Jetpack, a way to connect your blog to a WordPress.com account and activate additional features.

The last menu item beneath Plugins in the WordPress dashboard is the **Editor**. The built-in WordPress plugin editor can be used to make changes to any of your plugins' individual PHP files. Just be aware that if you make changes, plugin updates will overwrite your customizations. So, unless you know PHP, you probably won't want to edit any of your plugin's PHP code.

### **WordPress Themes**

A WordPress theme provides all of the front end styling of your WordPress site.

WordPress uses themes to control the look and presentation of your site. You can quickly change themes and change the entire look of your site, while still maintaining the underlying WordPress software that powers your site.

WordPress themes are kind of like how a new outfit can give you an entirely new look. But themes go even deeper than just the design. They control the layout and functionality of your site as well. You can create different layouts for different types of content with a theme.

It's part of what makes WordPress so powerful. You can change the entire look of your site without ever changing the content or backend structure. A few clicks of the mouse and you can add a new theme and have an entirely new look. It can make updating your site and keeping things current a much quicker and simpler process. Instead of rebuilding a house from the ground up, you're just replacing the siding, so to speak.

Themes come in all types and varieties, including free and premium themes. You can also customize a theme to make it your own.

Most WordPress themes provide:

- The overall design or style of your site
- Font styling
- Colors
- Widget locations
- Page layouts (or templates)



- Styles for blog posts and blog archives
- Additional stylistic details

### Free vs. Paid WordPress Themes

Just like WordPress plugins, you can choose from over a thousand free themes from the WordPress Theme Directory. The advantages of premium themes are like those of premium plugins. Premium themes usually have a reliable code base and offer support if something goes wrong.

Some premium themes, like Builder, operate more like web design software, allowing you to design and build your own theme designs and page layouts.

### **How to Install a WordPress Theme**

In addition to the default theme included with your WordPress installation, you can also install your own WordPress theme to change the look and style of your site.

### Download & Upload Method

*Note: If you're using a premium theme from a third party source, they will usually come as a .zip file. You'll need to use the download & upload method to install the theme zip file on your site.*

1. From the WordPress dashboard, expand the **Appearance** menu in the left-hand navigation panel. Click the **Themes** link.
2. Click the **Add New** button.
3. Click the **Upload Theme** button, **locate your theme zip file** and then click **Install Now**. Then, click **Activate**.

### Search & Install Method

Much like installing plugins, you can search for a theme and install it directly from your WordPress dashboard.

1. From the **Appearance > Themes** page, click on the **Add New** button. You can search the Free Theme Directory right from your WordPress dashboard. Find a theme you like (you can use the search box or the feature filter to sort by various options)
2. When you're looking at a specific theme, you can click on **Preview** to see the theme in action. Click around to see different pages and make sure you like what you see. Some things may be options you can customize, but other tweaks will require editing the code of the theme.
3. Once you find a theme you like, click 'Install.' Once the theme is installed, just click the **Install** button. And just like that, your site has a brand new look.

### Manual Method

You can also add themes by manually uploading them to your server with FTP software. This is more complicated and not for the novice user. You'll need to download a theme to your computer and unzip it. This will give you a folder on your computer with all the theme files. Then, using an FTP program, upload the theme folder to the wp-content/themes folder on your site. Then go to the Themes screen in your dashboard and you will see your new theme in the list. Click 'Activate' to get started.

## Managing Your WordPress Themes

1. To manage your WordPress themes, expand the **Appearance** menu in the WordPress Dashboard.
2. Here, you'll see the **Themes** page.
3. The very first theme listed on this page is your **Active theme**. Here we also see an option to **Customize**. If you click this button, you'll see a preview window that allows you to make stylistic changes to your site, such as your **Site Identity (Site Title, Tagline & Site Icon)**. From here, you can also make changes to **Menus** and the **Front Page**.
4. If you return back to the **Themes** page, you'll see a grid list of available themes in addition to your active theme. These are themes that have been also installed on your WordPress site, but aren't active.
5. If you click the **Live Preview** link under any theme, you'll see a preview of how your site would look with that theme. In the preview, you can navigate to different pages to see how the theme handles posts, archives and other page templates.
6. In the left-hand panel of the preview window, you can edit the theme settings. These settings will differ, depending on what theme features the theme supports.
7. To accept the new settings and activate the theme all in one step, click the **Save & Activate** button at the top of the left-hand panel.

### **Using WordPress Widgets**

WordPress Widgets add additional content and features to your WordPress site. Examples of widgets are search bars, a list of post categories or tags, and custom menus.

One of the great things about WordPress widgets is that they require no code experience or expertise. Thanks to WordPress, they can simply be added, removed and rearranged.

The actual location of widgets on your site depends on your WordPress theme. Most WordPress themes offer several different page templates that decide where widget locations are in the page design, such as in the sidebar of your blog, or at the bottom of your home page.

In addition to the default WordPress widgets, WordPress plugins often add their own widgets as well. Some may add additional options for customization features.

To see how widgets work, log in to your WordPress site and visit the **Appearance > Widgets** panel. On the left side of the page, you'll see all available widgets. Default widgets will be visible here, plus any additional widgets that have been added by your installed plugins. On the right, you'll see all of your available widget locations.

To add a widget to a location, simply drag the widget from its place on the left into the right section to activate them. To remove them, simply drag the widget back or click delete.

If you ever have questions or need help using widgets, just click the help tab from the top of the screen. Here you'll find an overview, information on removing and reusing widgets and how to handle missing widgets if you change your WordPress theme.

## Creating a Custom Menu in WordPress

With WordPress, you can easily create a custom menu, which usually serves as a navigation menu for your site.

Custom menus in WordPress may contain links to pages, categories, custom links or other content types. You can also specify a different navigation label for a menu item as well as assign other attributes.

There's no limit on how many menus you can create, so if your theme includes more than one menu location, you can choose which custom menu to associate with each location. You can also use custom menus in conjunction with the *Custom Menus* widget.

### How to Create a Custom Menu in WordPress

1. To get started creating a custom menu, log in to your WordPress site and click to expand the **Appearance** menu on the left side of the WordPress Dashboard.
2. Click on the **Menus** link in the **Appearance** menu. You'll now see the Menus editor page.
3. Enter your menu name, and click **Create menu**.
4. Now you're ready to **add menu items** from the boxes on the left, such as pages, categories and links.
5. If you'd like to change which menu options you see from this page, click to expand the **Screen Options** tab. Now you can add other menu items options such as posts, tags or formats, or show advanced menu properties like CSS classes.
6. When you have your menu items arranged in order, click **Save Menu**. You now have a new navigation menu that can be added to any menu location on your WordPress site.

## Managing Comments in WordPress

With WordPress, visitors can leave comments on posts and pages.

One of the greatest things about blogs is the ability to let readers comment. One of the worst things about blogs is the ability to let readers comment.

Running a website with public comments can be extremely rewarding and, at times, frustrating. Giving your readers a forum to voice their opinion can refine your work, help you discover new perspectives and even give you a much-needed pat on the back. Giving your readers that opportunity can also open you up to a world of headaches, spam and endless arguments.

But most bloggers will tell you that despite the drawbacks, comments are worth it in the end:

- By giving your readers a voice you're showing them how valuable they are to you. That kind of loyalty means a lot.
- Let's face it: You don't know everything. Nobody does. Having comments is a subtle way to admit that you're not perfect and allow your readers to help you out. And they will. It will make your writing stronger and your site better.
- Often the contributions of comments will outweigh the value of the original post. Sometimes great ideas will be shared, links offered or massive discussions that go far deeper than you could have dreamed. And it's all on your site. That's gold.
- It can build community. When people have a "voice" on your blog, they feel valued and that what they say makes a difference.

In the end, whether or not to have comments is an important choice and one you shouldn't take lightly. You need to weigh the pros and cons. You need to decide if open comments fit your company's style. For some organizations it's a perfect fit. For others—it's awkward.

If you're undecided about comments, there is good news. There are a lot of halfway solutions.

You're also welcome to change your mind and turn comments on or off at will (of course if you turn comments on after they've been off for a while you've already missed out on the best input from your readers). But whatever you decide, it's best to pick a solution and stick to it. Your readers will get confused if commenting is inconsistent on your site.

### Commenting Policy

Once you've decided to have comments, it's important to have a commenting policy in place. It doesn't necessarily have to be public, but you might consider it. What's important is to know how you're going to respond to a specific situation and enforce your rules consistently.

1. Are commenters allowed to use profanity? Where do you draw the line?
2. It's easy for a comment thread to get off topic. Is that OK or do you want comments to only pertain to your post?
3. Discussions often turn into debates, which turn into flat-out arguments. Do you step in to restore order? Or let people duke it out?
4. What do you do when someone disagrees with you or your company? What if that means they recommend competitors?
5. What happens when someone ignores your rules?

You may not run into any of these comment issues. But it helps to be prepared. Often the style of your organization will help you determine your comment policy. A loose, care free organization might encourage people to disagree. A strict, top-down company might ban any discussion of competing products. It's your website—you set the tone.

Here's another thing you'll need to decide: how active are you going to be in your own comments? Some people like to be very active, encouraging responses and interacting with readers. That can also be time-demanding, but may also benefit your business. Other people may only step in when it's absolutely necessary, letting their readers have their own discussion.

### Managing Comments in WordPress: The Comments Page

Managing comments in WordPress is quite similar to the way posts and pages are managed. From the WordPress dashboard, visit the **Comments** page.

A yellow row means the comment is waiting for you to moderate it. You can act on comments using the **on-hover action links** or the **Bulk Actions**. In the **Author** column, in addition to the author's name, email address, and blog URL, the commenter's IP address is shown. Clicking on this link will show you all the comments made from this IP address.

In the **Comment column**, each comment includes *Submitted on* information, followed by the date and time the comment was left on your site. Clicking the date/time link will take you to that comment on your live site.

Hovering over any comment gives you options to approve, reply (and approve), quick edit, edit, spam mark, or trash that comment.

In the **In Response To** column, there are three elements. The text is the name of the post that comment is assigned to, and links to the post editor for that entry.

The **View Post** link leads back to that post on your live site. This small bubble with the number shows the number of approved comments that post has received. If the bubble is gray, you have moderated all comments for that post. If it is blue, there are pending comments.

Clicking the bubble will filter the comments screen to show only comments on that post.

### Managing Comments from the Dashboard Home Screen

Another way to manage comments is from the **WordPress dashboard home screen**. Here you'll see recent comments and you can quickly and easily approve, reply, edit, mark as spam or trash by hovering over these links.

### WordPress Comment Settings

Don't forget you can change your Comment or Discussion settings from within the WordPress settings menu. This page allows you to make changes to the details of comments made on your site, plus the ability to blacklist comments to help manage spam comments.

### **Creating Users in WordPress**

Creating users in WordPress allows you to add users with different roles and access privileges to your site. Once created, a user will be able to log in to your site with a username and password.

WordPress allows you to create users with specific roles. Different roles have different responsibilities and powers within WordPress. This is important if you have a team working on your site. It allows you to have a process where only certain users can do specific tasks, such as publish posts. It's a good way to ensure quality control, spread out responsibility and keep everything in check.

WordPress user roles include *site administrator, editor, author, contributor and subscriber*. These user roles control the level of site management granted to a user including the ability to write, edit or publish content on your site. Users with lower access roles will see fewer options in the WordPress Dashboard when they are logged in.

### Here's an overview of the five different user roles in WordPress:

- **Administrator:** Access to all administrative features. When you install and set up WordPress you're automatically given an administrator account.
- **Editor:** Can write, edit and publish posts and pages, as well as manage other users' posts.
- **Author:** Can write and edit their own posts, as well as publish them.
- **Contributor:** Can write and edit their own posts, but they can't publish them.
- **Subscriber:** Can only manage their own profile. This role is usually for readers of your blog and makes commenting and interaction easier (especially if you only allow registered users to comment).

## Creating Users in WordPress

1. To add a new user to your WordPress site, log in to your WordPress site and click to expand the **Users** menu.
2. Click the **Add New** link located in the Users menu.
3. Enter the **username, email address, first name, last name, website, and password** for the user.
4. If this user is brand new, it's a good idea to select to **send this password to the new user by email**.
5. Next, select the **subscriber role** for the user.
6. To see a basic overview of WordPress user roles, click the **Help** tab at the top of the screen. Here you'll see details for how user roles relate to site privileges, so you'll be able to decide which level of access to grant to your new user.

## Editing Users

Once a user is created, you can mouse over their name in the Users list and an Edit link will appear. Click the **Edit** link to access the Profile edit screen. There are a number of helpful options here, most self explanatory, but a few could use some explanation:

- *Visual Editor:* If you need people to enter HTML and not use the visual editor, you can force them to use HTML by disabling the visual editor here.
- *Admin Color Scheme:* Change up the default colors a user sees in their WordPress dashboard.
- *Keyboard Shortcuts:* Enable keyboard shortcuts for comment moderation.
- *Toolbar:* This turns off the WordPress admin bar when that user is logged in.
- *Username:* Note that the username cannot be changed.
- *First Name, Last Name & Nickname:* These fields allow you to enter this information for a user, so their first and last name can be used in blog post authorship.
- *Display name publicly as:* Once you enter a first name, last name and nickname you'll have several options in this dropdown. This determines how WordPress will display this user's name.
- *Biographical Info:* This bio paragraph can be optionally displayed, depending on your theme. This can help you quickly and easily create author pages for your blog team.

*Note: Do not create a user named "admin." This is one of the easiest ways hackers find their way into your site.*

If you have the option of assigning the username during your WordPress installation, create a username other than "admin". If you do not have the option of assigning the first username, it will be "admin" by default. All you have to do is then create another user as an administrator, with a different username. You can then log in as the new administrator and delete the old "admin" account from the User panel.

## **Search Engine Optimization (SEO) & WordPress**

You want people to find your site, so you need to make sure it can be found. A major way to do that is to focus on search engine optimization (SEO).

SEO is the process of making the tweaks and adjustments to your site that search engines like so they'll rank your site higher. Showing up higher in search results means more people finding your site.

There are some simple strategies that can boost your SEO. Simply creating content is a good first step. Having more content gives search engines more things to rank, giving a user more opportunities to stumble across your site. It also means you have more content for people to link to. More links from other sites will also help your SEO.

Using WordPress is another good way to improve your SEO. WordPress is designed to be a search engine friendly way to build your site, so right from the start using WordPress will give you a leg up in the SEO game. You can also use plugins to further boost your SEO.

## **WordPress Security**

WordPress security is a big topic these days, but there's plenty you can do to secure your site.

### *1. Keep It Current*

One of the biggest security vulnerabilities in WordPress is old software. WordPress is updated fairly often and whenever there's a new security issue they roll out an update immediately. But that doesn't do you any good if you're not keeping your installation up to date. You also need to keep your themes and plugins up to date—they can have security issues as well.

Sometimes people put off updates for fear of breaking their site, but you'd rather break your site with an update than risk a break-in. Also, just because a plugin is deactivated doesn't mean it's not a threat. You need to delete the plugin entirely.

### *2. Strong Passwords*

Your security is only as good as your password. If you've got a simple password, you've got a simple site to hack. You need to use strong passwords. Your password should have numbers, capitals, special characters (@, #, \*, etc.) and be long and unique. Your WordPress password can even include spaces and be a passphrase.

Don't use the same password in multiple places. Yes, remembering different passwords for different sites is tough, but a hacked site is worse.

### *3. Manage Users*

Your own strong password is useless if another admin has a weak one. You need to manage your users. Not everybody needs admin access. The more people with admin access, the more chances to hack your site. Make sure you're only giving admin access to the people who truly need it. And make sure those few admins are following good security practices. Remember to update or remove users when you have staff transitions.

### *4. Back It Up*

If anything ever goes wrong with your site, you want to be able to get it back up quickly. That means you need a backup plan. In order for backup to work, it needs to be complete and automatic. Backing up your database isn't enough. That will save your content, but you'll still have to rebuild your entire site, including theme tweaks and plugin settings. And if your backup isn't automatic, you'll forget about it.