

VISUAL QUICKSTART GUIDE

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WordPress

Second Edition

JESSICA NEUMAN BECK • MATT BECK

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Visual QuickStart Guide

WordPress, Second Edition

Jessica Neuman Beck and Matt Beck

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Introduction

WordPress is an open source blogging platform that boasts the largest user base of any self-hosted blogging tool in the world. Users can set up a blog on WordPress.com or install WordPress with a hosting company or on a personal server, allowing for flexibility and easy customization. It's highly extensible, with a veritable treasure trove of add-ons and plug-ins available both in the official WordPress repository and elsewhere on the Internet. Since the project is open source, it's easy for developers to work with—and it's free!

In this introduction, we'll talk about what a blog is and how to use it. We'll tell you a little more about WordPress and give you an overview of new WordPress features. We'll also explore the differences between WordPress.org and WordPress.com to help you decide which one is right for you.

In this book, we'll focus on the self-hosted version of WordPress available at WordPress.org. However, many of the usage tutorials are applicable to both self-hosted WordPress installations and WordPress.com blogs, so if you're new to WordPress, read on!

Blogs Explained

A blog is a Web site that displays posts or articles in a sequential order, with the newest posts appearing first. The word *blog* comes from *Weblog*, itself a contraction of *Web* and *log*.

Blogs began as online journals, usually featuring a single author writing about a specific topic or interest. However, blogs have expanded to encompass news sites, magazine-style sites, and even corporate Web sites, in addition to personal journals.

Blogs often fill a niche, focusing on a particular subject, and often encourage participation by enabling comments on articles or posts.

Many sites are built on blogging platforms like WordPress because the interface for adding posts and pages is easy for non-technical users to master.

The blog format tends toward the following:

- A new page is automatically generated for each post.
- Each post is defined by one or more categories.

- Posts can be further categorized by tags.
- Posts can be read sequentially or browsed in archives by date, category, or tag.

Design and layout are dictated by a pre-defined template or theme; changes to the theme affect the look and feel of the site but do not affect content (making it easy to modify a site's look).

Anatomy of a WordPress Blog

Although blogs can vary widely in layout, most contain these six basic segments. We're using the default WordPress theme as an example of a typical blog layout **A**.

- **Header:** This section usually includes the blog's name and a graphic, such as a logo.

- **Tagline (optional):** The tagline or slogan often gives the reader a better idea of what the blog is about. The WordPress default is "Just another WordPress weblog."
- **Navigation:** This consists of internal links to the different sections of the site, such as Archives, About, and Home.
- **Content:** This section changes depending on what section of the blog is being viewed; for example, on the home page the content may be an overview of the latest posts, whereas the contact page would include information and perhaps a form for getting in touch with the blog's author.
- **Sidebar:** Additional navigation may be located here, as well as snippets of code known as *widgets*, which may contain information such as the author's latest Twitter posts, polls, an overview of recent comments, or photos recently posted to Flickr.
- **Footer:** This section usually contains copyright and design information.



A A typical WordPress blog layout, with a header, tagline, navigation, sidebar, content, and footer.

In addition, each post's page contains information specific to the post, such as the time and date of posting, the author, the categories and/or tags, and (if comments are enabled) a place for readers to contribute their thoughts.

What's New in This Edition

WordPress regularly releases updates to their core platform, debuting new features, security fixes, and stability increases in controlled bursts. After WordPress 2.1, the development team began releasing updates on a regular schedule, roughly every 3 to 4 months. Major updates are named after famous jazz singers.

WordPress 3.0 (named after Thelonious Monk) saw a major overhaul of the WordPress platform, merging WordPress MU (Multi-User) with the WordPress core and making it possible to manage multiple installations of WordPress from one main installation. It also included many new features, such as the following:

- Custom menus
- Custom headers
- Custom backgrounds
- Contextual help
- Support for custom post types and custom taxonomies

Since the 3.0 update, WordPress has continued to evolve. WordPress 3.1 (named after Django Reinhardt) and WordPress 3.2 (named after George Gershwin) added more new features:

- Internal linking
- Admin Bar
- Post formats
- Full-screen editor
- Refreshed administrative UI

In addition, the WordPress team has decided to release a new default theme every year. These themes will take advantage of the latest WordPress features and have been named after the year in which they were released (Twenty Ten and Twenty Eleven). These default themes are included in core updates and are available to both self-hosted WordPress users and users on WordPress.com.

This edition of the WordPress Visual QuickStart Guide is now even more visual: Building on the success of the top-selling Visual QuickStart Guide books, Peachpit now offers Video QuickStarts. As a companion to this book, Peachpit offers two hours of short, task-based videos that will help you master top features and techniques; instead of just reading about how to use a tool, you can watch it in action. It's a great way to learn all the basics and some of the newer or more complex features of WordPress. Log on to the Peachpit site at www.peachpit.com/register to register your book, and you'll find a free streaming sample; purchasing the rest of the material is quick and easy.

WordPress.org vs. WordPress.com

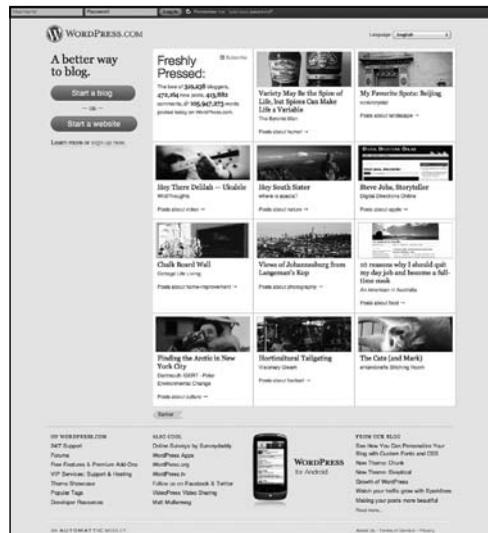
There are two distinctly different versions of WordPress: the downloadable, open source version found at WordPress.org **A** and the hosted version at WordPress.com **B**.

The self-installed version of WordPress is the most common; you install in on your own Web server (most likely on a hosting account), and you have full access to both the source code and the database where your information is stored.

WordPress.com is a free, hosted blog service (meaning you can use it without a hosting account). Setup, upgrades, spam protection, and backups are all taken care of by the WordPress.com service, but you do not get FTP or shell access and cannot modify your site's PHP. WordPress.com also has some content restrictions (for example, paid or sponsored post content is not allowed).



A WordPress.org.



B WordPress.com.

Here's a handy reference table so you can quickly see the difference between WordPress.org and WordPress.com.

At first glance, a blog hosted on WordPress.com is similar to the self-hosted version. Like other hosted blogging services such as TypePad and Blogger, WordPress.com allows basic theme customization (from a preapproved set of themes) and lets users add pages, sidebars, and widgets. The free account takes only seconds to set up. Free users are given a subdomain at [yourname].wordpress.com and currently get 3 GB of storage for images and media. Options like theme styling, suppression of WordPress text ads, and a custom domain name are available for a fee. It's a good solution for beginners looking to have an online presence without owning a domain name or paying for Web hosting.

However, if you're an advanced user, a Web professional, or someone using WordPress for a business, you need to be able to modify and customize your site to create

a unique brand experience. That's where the self-hosted version of WordPress from WordPress.org comes in. With it, you have full control over every aspect of your site. You'll be able to build your own theme, install plug-ins, and easily modify your design. This is particularly important if you want to use WordPress as a lightweight content management system (CMS) rather than "just a blog."

With a self-hosted WordPress installation, you can create a full-featured site that functions in whatever way you want it to, limited only by your imagination (and your knowledge of theme building).

TIP If you're still not sure which version of WordPress is right for you, sign up for a free account at WordPress.com to give the hosted service a test drive. Even if you don't end up using your WordPress.com blog, a WordPress.com account can be used to tie in with some fun plug-ins (like Jetpack) for the self-hosted version of WordPress. We talk more about installing the Jetpack plug-in in Chapter 15, "More Ways to Customize WordPress."

TABLE I.1 Comparison of WordPress.org and WordPress.com

WordPress.org	WordPress.com
Free to use	Free to use basic version
Installed on your own Web server or Web hosting account	Hosted on WordPress.com
Ads are not included by default (though you may choose to run your own ads)	Ads may be displayed on your blog
Thousands of plug-ins and themes	Limited selection of plug-ins and themes
Fully customizable	Features may be extended by paying for premium services
Unlimited user accounts	Built-in analytic statistics
No content restrictions	Number of users is limited
Requires setup and maintenance	Content restrictions apply
	Requires no setup aside from choosing theme and entering content

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4

Managing Accounts

WordPress user accounts allow people to access your site and its content in different ways. Administrators have full access to all parts of your site, including theme and plug-in settings and user management. You can set up Author and Editor accounts to let your users post articles, and Subscriber accounts make commenting a breeze. You can even restrict access to certain portions of your site to registered users.

This chapter will give you the lowdown on all the account types and how to use them. We'll also show you how to configure your own account to get the most out of your WordPress experience by enabling and disabling features like the Admin Bar and the Visual Editor.

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Configuring Your Account

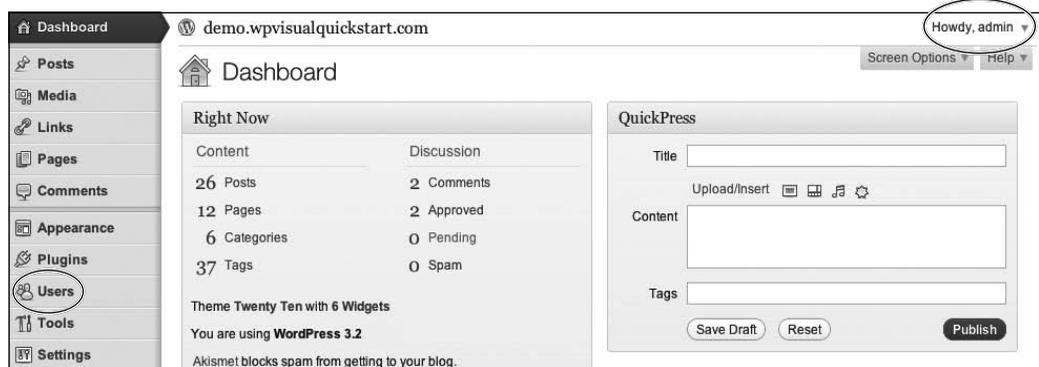
Make your WordPress installation as unique as you are. You can customize everything from the way your name is displayed to the color scheme for your admin screen.

To access your account information:

Click your username on the top right of any area in your Dashboard (where it says “Howdy, *username*”).

or

Click Users > Your Profile in the sidebar **A**.



A Click either your username or Users > Your Profile to edit your account information.

Profile

Personal Options

Visual Editor Disable the visual editor when writing

Admin Color Scheme Blue Gray

Keyboard Shortcuts Enable keyboard shortcuts for comment moderation. [More information](#)

Show Admin Bar when viewing site in dashboard

Name

Username Username cannot be changed.

First Name

Last Name

Nickname (optional)

Display name publicly as

Contact Info

Email (required)

Website

AIM

Yahoo IM

Jabber / Google Talk

About Yourself

Biographical info

Share a little biographical information to fill out your profile. This may be shown publicly.

New Password: If you would like to change the password type a new one. Otherwise leave this blank. Type your new password again.

Strength indicator: After: The password should be at least seven characters long. To make it stronger use upper and lower case letters, numbers and symbols like " ! " % * & .

B Profile options in the admin screen.

Personal Options

Visual Editor Disable the visual editor when writing

Admin Color Scheme Blue Gray

Keyboard Shortcuts Enable keyboard shortcuts for comment moderation. [More information](#)

Show Admin Bar when viewing site in dashboard

C Click the link for more information on keyboard shortcuts.

Name

Username Username cannot be changed.

First Name

Last Name

Nickname (required)

Display name publicly as

D You can change anything except your username, and you can choose a preferred nickname from the drop-down menu.

To set up your profile:

1. From the Profile page, choose among the Personal Options **B**. You can choose to disable the Visual (WYSIWYG) Editor when writing and choose a color scheme for your admin dashboard, and you can enable keyboard shortcuts for moderating comments. You can also choose whether to display the Admin Bar when viewing your site, in the dashboard, or both. Deselect the check boxes to disable the Admin Bar completely **C**.
2. In the Name section of the profile page, change or enter your full name and a nickname, and then choose your preferred display name from the drop-down menu **D**. This name will display in the “Howdy, *username*” salutation at the top of the admin screen and also on your posts and comments.

continues on next page

- If you want to provide additional contact information, do so in the Contact Info section. You can change the e-mail address associated with your user-name, and you can add other contact information, such as the URL for your website and your instant messaging identities **E**.
- In the About Yourself section, add biographical information if you like. Some themes display this publicly on the site. This is also where you can update your password **F**. This is the password you use to log in to the site, so be sure to choose something you will remember! WordPress will let you know whether your password is strong or weak in the Strength indicator.

Contact Info

E-mail (required)

Website

AIM

Yahoo IM

Jabber / Google Talk

E Update your e-mail address and add other contact info here.

TIP The Admin Bar can be disabled only on a user-by-user basis; to disable it site-wide, you'll need to make a change to the functions.php file. We'll walk you through how to do that in Chapter 11, "Getting Fancy with Themes."

TIP When you're choosing a password, WordPress recommends using use upper- and lowercase letters, numbers, and symbols (such as ! " ? \$ % ^ &), to keep hackers from accessing your account.

About Yourself

Biographical Info

Share a little biographical information to fill out your profile. This may be shown publicly.

New Password If you would like to change the password type a new one. Otherwise leave this blank.

Type your new password again.

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

F The Strength indicator will tell you whether you have chosen a password that would be difficult for a hacker to guess.



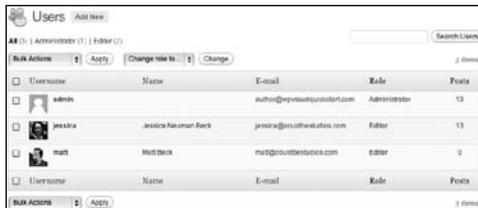
A Click Users to access the list of current user accounts.

Managing User Accounts

Whether your WordPress site is a solo affair or a group effort, user accounts make it easy to see who has access to what. You can add new user accounts manually or allow prospective users to add themselves (at an account level that you have specified). You can get rid of troublesome or outdated accounts with just a few clicks.

To add a user account:

1. Click Users in the sidebar menu to access the list of current user accounts for your WordPress site **A**. You'll be taken to the Users page **B**.
2. Click Add New to add a new user. You'll be taken to the Add New User screen **C**.
3. Enter a username, e-mail address, and password for your new user (the user will have the option of changing the password when he or she logs in). You can select whether you want to send login information (including the password you've chosen) to the new user by e-mail.



B Current users and their roles are listed here.



C The Add New User screen lets you manually add a new user.

continues on next page

- Set the user's first and last name and Web site address here, and select the new user's role from the drop-down menu **D**.
- Click Add New User to create the new user account. You'll return to the Users screen, where you'll see a confirmation message at the top of the page **E**.

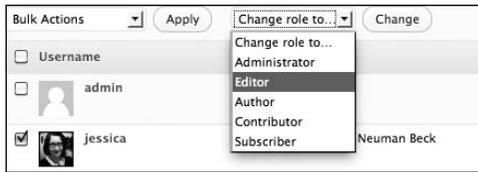
TIP If you don't select the "Send this password to the new user by email" check box in the Add New User screen, you'll need to notify the user of their login information yourself.

TIP The default user role for new users can be set or changed in Settings > General.

D Fill out these fields to create a new user.

Username	Name	E-mail	Role	Posts
admin		author@wpvisualquickstart.com	Administrator	10
jessica	Jessica Neuman Beck	jessica@couldbestudios.com	Editor	13
matt	Matt Beck	matt@couldbestudios.com	Editor	0

E You've successfully created a new user!

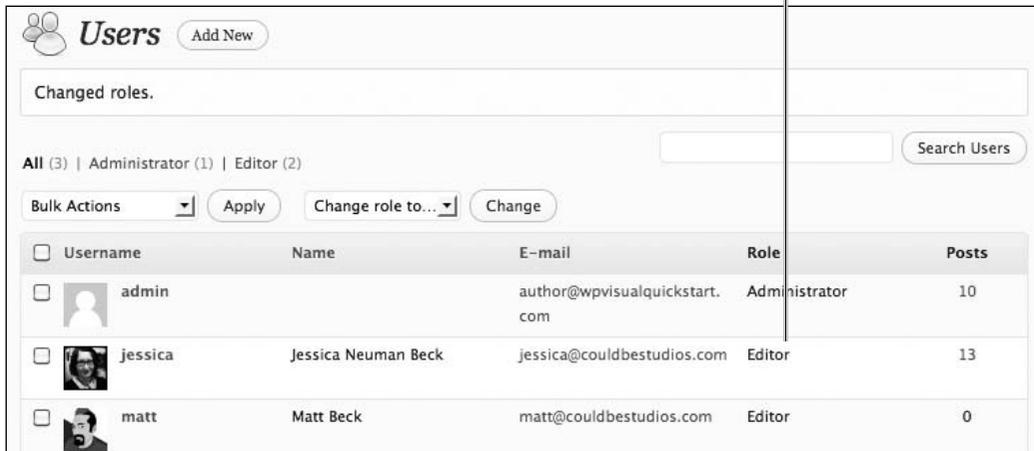


F Choose a user and change roles using the drop-down menu.

To change user roles:

1. On the Users page, select the check box next to the username of the user whose role you want to change.
2. From the “Change role to” drop-down menu, choose the new role **F**.
3. Click the Change button when you have made your selection to apply the new role to the selected account(s). A message saying “Changed role(s)” will appear at the top of the screen **G**.

Role changed from Subscriber to Editor



G Success! You’ve changed a user’s role.

To edit user profiles:

1. On the Users page, click a username to open the user's profile **H**.

The process of editing a user's profile is similar to editing your own profile, but as the admin you can assign user roles in addition to setting general profile information **I**.

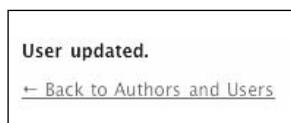
2. After making changes to a user's profile, click Update User at the bottom of the screen.

A confirmation will appear at the top of the page **J**.

<input type="checkbox"/>	Username	Name
<input type="checkbox"/>	admin	
<input checked="" type="checkbox"/>	Jessica	Jessica Neuman Beck
<input type="checkbox"/>	matt	Matt Beck

H Choose a user to edit.

I The User Profile editing screen.



J The message User Updated lets you know that your changes have been saved.

Breakdown of User Account Types

Account types in WordPress are also referred to as *roles*, and they're broken down as follows:

- Administrator: This is the Grand Poobah of account types, with access to all administrative features, including theme editing and user management.
- Editor: Editors can publish and manage their own posts and pages as well as those of other Editors, Authors, and Contributors.
- Author: This role gives users the ability to write, manage, and publish their own posts and pages.
- Contributor: A Contributor can write and manage his or her own posts, but cannot publish without approval from an Editor or Administrator.
- Subscriber: This type of user can read and comment on posts and receive notification when new articles are published.

Username	Name	E-mail	Role	Posts
<input type="checkbox"/> admin		author@wpbeginner.com	Administrator	10
<input type="checkbox"/> jessica	Jessica Neuman Beck	jessica@wpbeginner.com	Editor	13
<input type="checkbox"/> matt	Matt Beck	matt@wpbeginner.com	Editor	9
<input checked="" type="checkbox"/> sample	Sample User	info@wpbeginner.com	Subscriber	0

K Choose users to delete from this list.

Bulk Actions	Apply	Change role to...	Change
Bulk Actions			
Delete			
<input type="checkbox"/>		admin	
<input type="checkbox"/>		Jessica Neuman Beck	
<input type="checkbox"/>		Matt Beck	
<input checked="" type="checkbox"/>		Sample User	

L Click Apply to continue.

Delete Users

You have specified these users for deletion:

ID #4: sample

What should be done with posts and links owned by this user?

Delete all posts and links.

Attribute all posts and links to:

M Choose an option and confirm deletion.

1 user deleted

N You'll see a message telling you how many users were deleted.

To delete user accounts:

1. On the Users page, select the check boxes next to the name of the user(s) you wish you delete **K**.
2. From the Bulk Actions drop-down menu, select Delete **L**. Click Apply to go to the Delete Users page.
3. You can either delete all of the posts and links associated with the users you're deleting, or you can assign them to another user, such as the admin account **M**. Click Confirm Deletion.

Back on the Users page, you'll see a confirmation message at the top of the screen telling you how many users were deleted **N**.

TIP If the user you're deleting has contributed content to your site that you want to keep, you'll probably want to assign their posts and links to another user. If you're deleting a user because of inappropriate or abusive posts or comments, choosing the Delete All option is best.

Putting It All Together

- 1. Experiment with your profile options.**
When you enter biographical information, is it displayed on your site?
- 2. Create an alternate user account.** When you set up a new user, can you use the same e-mail address you already used for your administrator account?
- 3. Experiment with user roles.** Change the alternate user account you created in Step 2 to a contributor account. If you log in as that user, how does the Dashboard change? Can you create new posts?
- 4. Try to delete the alternate account you created above.** What happens to any posts that you created with that user?

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