

VISUAL **QUICKSTART** GUIDE



WordPress

Third Edition



JESSICA NEUMAN BECK
MATT BECK

© LEARN THE QUICK AND EASY WAY!

EBOOK

VISUAL QUICKSTART GUIDE

WordPress

Third Edition

JESSICA NEUMAN BECK • MATT BECK

WordPress: Visual QuickStart Guide, Third Edition

Jessica Neuman Beck and Matt Beck

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Introduction

WordPress is an open source blogging platform and content management system with 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 plugins available both in the official WordPress repository and elsewhere on the Internet. Because the project is open source, it's easy for developers to work with—and it's free!

In this introduction, we 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 be focusing on the self-hosted version of WordPress available at WordPress.org. This version offers the most flexibility and customization options. 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. Blogs have expanded, however, and now 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 nontechnical 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.

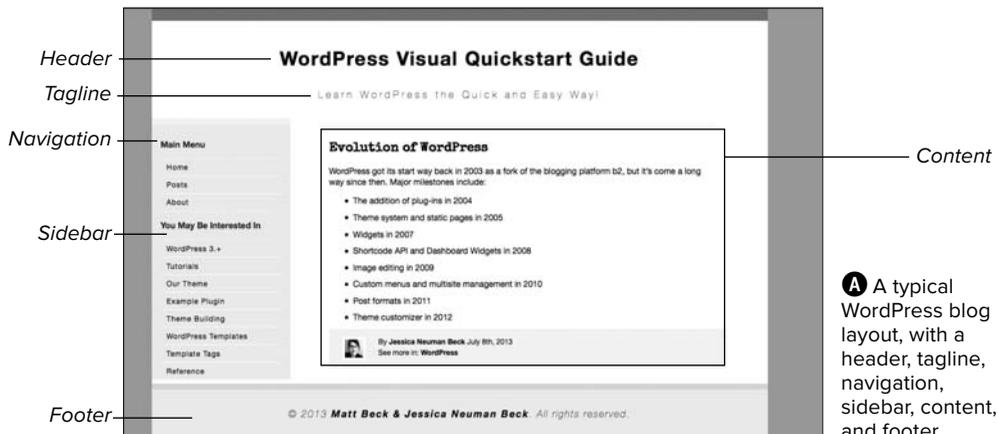
Design and layout are dictated by a predefined template or theme; changes to the theme affect the look and feel of the site but do not affect content (making it easy to modify a site's look).

Anatomy of a WordPress Blog

While 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**. The basic segments are:

- **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 tagline 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, while 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.



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 its 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 three to four months. Major updates are named after famous Jazz artists.

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:

- 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, and has added more new features:

- Internal linking
- The admin bar
- Post formats
- A full-screen editor
- A refreshed administrative UI
- Improved revisions
- New audio/visual APIs

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, Twenty Eleven, and the latest, Twenty Thirteen). These default themes are included in core updates and are available to both self-hosted WordPress users and users on WordPress.com.

WordPress.org Versus WordPress.com

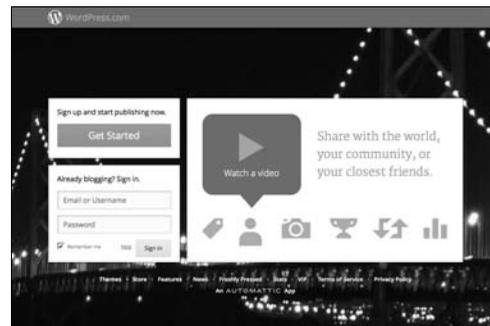
There are two distinctly different versions of WordPress: the downloadable, open source version found at WordPress.org **A** and the hosted version at WordPress.com **B**.

The self-installed version of WordPress, WordPress.org, is the most common. You install it 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 is the open-source, self-hosted variety of WordPress.



B WordPress.com is a free, hosted blog service.

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. Such options as 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.

If you're an advanced user, a Web professional, or someone using WordPress for a business, however, 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 (commonly referred to as a 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 for the self-hosted version of WordPress, like Jetpack. We talk more about installing the Jetpack plug-in in Chapter 15, "More Ways to Customize WordPress."

Table 1.1 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 (although 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	Number of users is limited
No content restrictions	Content restrictions apply
Requires setup and maintenance	Requires no setup aside from choosing theme and entering content
Analytic statistics offered by plug-ins	Built-in analytic statistics

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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.

In this chapter, we'll 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 such features as the Admin toolbar 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:

1. Click your username on the top right of any area in your Admin toolbar (where it says “Howdy, *username*”) .
- or
2. Click Users > Your Profile in the sidebar.



 Click your username to edit your account information.

The screenshot shows the WordPress Profile page with the following sections and fields:

- Personal Options:**
 - Visual Editor: Disable the visual editor when writing
 - Admin Color Scheme: Radio buttons for Blue (selected) and Gray
 - Keyboard Shortcuts: Enable keyboard shortcuts for comment moderation. [More information](#)
 - Toolbar: Show Toolbar when viewing site
- Name:**
 - Username: admin (Usernames cannot be changed)
 - First Name: Site
 - Last Name: Administrator
 - Nickname (required): admin
 - Display name publicly as: Site Administrator (dropdown menu)
- Contact Info:**
 - E-mail (required): info@oudbestudios.com
 - Website: [empty]
 - AIM: [empty]
 - Yahoo IM: [empty]
 - Jabber / Google Talk: [empty]
- About Yourself:**
 - Biographical Info: [empty text area]
- New Password:**
 - Fields for current password, new password, and confirm new password.
 - Strength indicator: [empty]
 - Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! " ? % * & .

At the bottom left is an "Update Profile" button.

B Profile options in the admin screen.

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, plus you can enable keyboard shortcuts for moderating comments. You can also choose whether to display the Admin toolbar when viewing your site.
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 **C**. 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

This close-up shows the Name section with the following fields:

- Username: admin (Usernames cannot be changed)
- First Name: Site
- Last Name: Administrator
- Nickname (required): admin
- Display name publicly as: Site Administrator (dropdown menu)

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

3. If you want to provide additional contact information, do so in the Contact Info section. You can change the email address associated with your username, and you can add other contact information, such as the URL for your website and your instant messaging identities **D**.

4. In the About Yourself section, add biographical information if you like. Some themes display this publicly on the site. The About Yourself section is also where you can update your password **E**. You'll use this password 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.

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



Contact Info

E-mail (required)

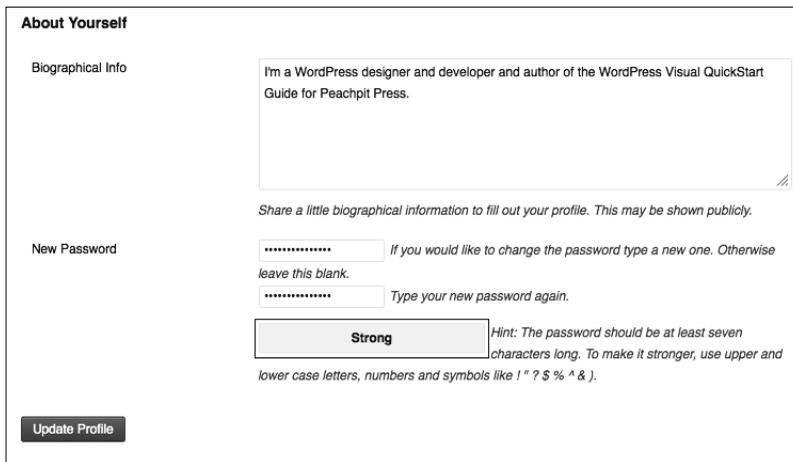
Website

AIM

Yahoo IM

Jabber / Google Talk

D Update your email address and add other contact info here.



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 ! " ? \$ % ^ &).

Update Profile

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

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.

Subscribers vs. Visitors

Anyone on the Internet can visit your site once it is live. If you've enabled commenting, your visitors have the ability to leave comments on your site, which can sometimes be a problem if you get targeted by a spambot or find yourself fielding hostile anonymous messages.

One way to cut down on spam and add a degree of accountability is to require that visitors sign up as subscribers before they can comment. (See the "Discussion Settings" section in Chapter 3, "Settings," for details.)

A Subscriber account is a WordPress user type that gives commenters the ability to read your site and to fill out their own profile. Subscribers can comment and edit their own profiles, but they cannot add new content to your site.

Another added bonus of requiring subscriber accounts for commenters: If someone is posting hostile or harassing comments, you can simply delete that person's account. As a visitor the person still can view your posts, but no longer will be able to comment on them.

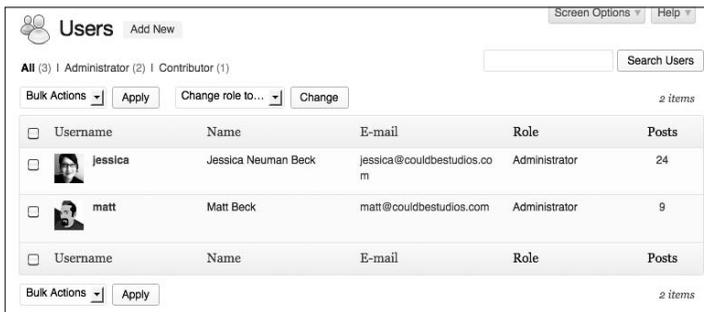
continues on next page

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, email 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 email.
4. 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**.



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



B Current users and their roles are listed here.

A screenshot of the 'Add New User' screen. The form fields are empty. The fields are: Username (required), E-mail (required), First Name, Last Name, Website, Password (twice, required). Below the password fields is a 'Strength Indicator' showing 'Medium' and a hint: 'Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! * ? \$ % ^ & ;'. There is a 'Send Password?' checkbox and a 'Role' dropdown menu set to 'Subscriber'. An 'Add New User' button is at the bottom.

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

A screenshot of the 'Add New User' screen with the form fields filled out. The fields are: Username (required) 'matt', E-mail (required) 'matt@couldbestudios.com', First Name 'Matt', Last Name 'Beck', Website 'http://www.couldbestudios.com', Password (twice, required) '*****'. The 'Strength Indicator' shows 'Medium' and the same hint as in the previous screenshot. The 'Send Password?' checkbox is checked, and the 'Role' dropdown menu is set to 'Administrator'. An 'Add New User' button is at the bottom.

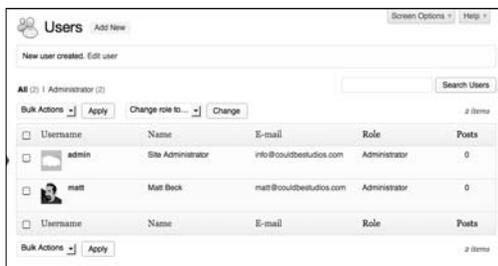
D Fill out these fields to create a new user.

- Click Add 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 the login information yourself. The default user role for new users can be set or changed in Settings > General.

To change user roles:

- On the Users page, select the check box next to the username of the user whose role you want to change.
- From the "Change role to" drop-down menu, choose the new role **F**.
- 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**.

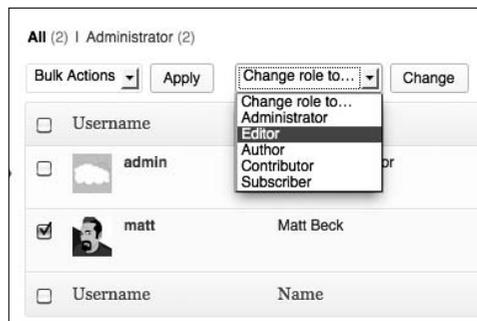


E You've successfully created a new user!

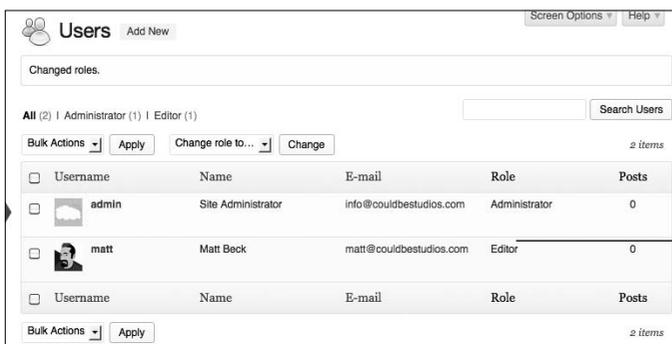
The More, The Merrier: Multiple Authors

If you plan to have more than one person writing on your site, you can take advantage of Author accounts. Authors can write, manage, and publish their own posts without being able to edit anyone else's. Each post will be associated with the author's name. You can even set up author profile pages that display each author's bio, a link to their personal web sites, and a list of the articles they have published on your site.

To learn how to create author pages, see Chapter 15, "More Ways to Customize WordPress."



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



Role changed from Subscriber to Editor

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

Breakdown of User Account Types

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

- **Super Admin:** When multi-site features are enabled in WordPress, a Super Admin can access the site network administrative features, as well as all other features available to an Administrator (see the section “Administering a Blog Network” in Chapter 14, “One Installation, Multiple Blogs”).
- **Administrator:** This is typically the most privileged account type used for a single site, 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.

To edit user profiles:

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

Edit the user's profile. As the admin you can assign user roles in addition to setting general profile information **H**.

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 **I**.



The screenshot shows the 'Edit User' interface in WordPress. At the top, there's a title 'Edit User' and a link 'Add New'. Below this is a 'Personal Options' section with several settings: 'Visual Editor' (checkbox for 'Disable the visual editor when writing'), 'Admin Color Scheme' (radio buttons for 'Blue' and 'Gray'), 'Keyboard Shortcuts' (checkbox for 'Enable keyboard shortcuts for comment moderation'), and 'Toolbar' (checkbox for 'Show Toolbar when viewing site'). The 'Name' section includes fields for 'Username' (jessica), 'Role' (Administrator), 'First Name' (Jessica), 'Last Name' (Beck), 'Nickname (required)' (jessica), and 'Display name publicly as' (Jessica Beck). The 'Contact Info' section has fields for 'E-mail (required)' (jessica@coudbestudies.com) and 'Website' (http://www.coudbestudies.com).

H The User Profile editing screen.



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

<input type="checkbox"/>	Username	Name
<input type="checkbox"/>	 admin	Site Administrator
<input checked="" type="checkbox"/>	 jessica Edit Delete	Jessica Beck
<input type="checkbox"/>	 matt	Matt Beck

J Choose users to delete from this list.

 **Users** [Add New](#)

All (4) | Administrator (2) | Editor (1) | Subscriber (1)

Bulk Actions Apply Change role to... Change

<input type="checkbox"/>	Username	Name
<input type="checkbox"/>	 admin	Site Administrator
<input type="checkbox"/>	 jessica	Jessica Beck
<input type="checkbox"/>	 matt	Matt Beck
<input checked="" type="checkbox"/>	 sample	sample user
<input type="checkbox"/>	Username	Name

K Click Apply to continue.

 **Delete Users**

You have specified this user for deletion:
ID #: sample

What should be done with posts owned by this user?

Delete all posts.

Attribute all posts to: Jessica Beck

[Confirm Deletion](#)

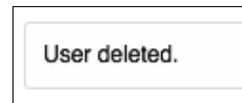
L Choose an option and confirm deletion.

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 **J**.
2. From the Bulk Actions drop-down menu, select Delete **K**. 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 **L**. 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 **M**.

TIP If the user you're deleting has contributed content to your site that you want to keep, you can assign those 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.



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

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 email 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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