

## WordPress Walkthrough Checklist

### Logging In

- 1- Go to the Admin Login screen, located at <http://yoursite.com/wp-login.php> or <http://yoursite.com/wp-admin/> (note: if WordPress has been installed in a subdirectory, the login screen should be located at <http://yoursite.com/subdirectory/wp-login.php>).
- 2- Enter your username and password
- 3- Click the Login button



The image shows the WordPress Admin Login form. At the top, there is the WordPress logo (a circular 'W') followed by the word 'WORDPRESS' in a blue, serif font. Below this is a white rectangular box containing the login fields. The first field is labeled 'Username' and is an empty text input. The second field is labeled 'Password' and is an empty text input. Below the password field is a checkbox labeled 'Remember Me'. To the right of the checkbox is a blue button with the text 'Log In' in white. Below the entire form box is a blue hyperlink that says 'Lost your password?'.

# The WordPress Dashboard

**Dashboard**

Jetpack is installed and ready to bring awesome, WordPress.com cloud-powered features to your site. [Learn More](#)

## Welcome to your new WordPress site!

If you need help getting started, check out our documentation on [First Steps with WordPress](#). If you'd rather dive right in, here are a few things most people do first when they set up a new WordPress site. If you need help, use the Help tabs in the upper right corner to get information on how to use your current screen and where to go for more assistance.

- Basic Settings**  
Here are a few easy things you can do to get your feet wet. Make sure to click Save on each Settings screen.
  - [Choose your privacy setting](#)
  - [Select your locale and time zone](#)
  - [Turn comments on or off](#)
  - [Fill in your profile](#)
- Add Real Content**  
Check out the sample page & post editors to see how it all works, then delete the default content and write your own!
  - [View the sample page and post](#)
  - [Delete the sample page and post](#)
  - [Create an About Me page](#)
  - [Write your first post](#)
- Customize Your Site**  
Use the current theme — [Responsive](#) — or [choose a new one](#). If you stick with [Responsive](#), here are a few ways to make your site look unique.
  - [Set a background color](#)
  - [Select a new header image](#)
  - [Add some widgets](#)

Already know what you're doing? [Dismiss this message](#)

### Right Now

Content	Discussion
1 Post	1 Comment
1 Page	1 Approved
3 Categories	0 Pending
0 Tags	0 Spam

Theme **Responsive** with **6 Widgets**  
Search Engines Blocked  
You are using **WordPress 3.4.2**.

### Recent Comments

From Mr WordPress on Hello world! #  
Hi, this is a comment. To delete a comment, just log in and view the post's comments. There you will have ...

All | Pending (0) | Approved | Spam (0) | Trash (0)

### Incoming Links

This dashboard widget queries Google Blog Search so that when another blog links to your site it will show up here. It has found no incoming links... yet. It's okay — there is no rush.

### Plugins

**Most Popular**  
[Ultimate TinyMCE](#) (install)  
Description: Beef up your visual TinyMCE editor with a plethora of advanced options.

**Newest Plugins**  
[Game Timer](#) (install)  
Game timer with email notification and music alert.

### QuickPress

Title:

Content:

Tags:

### Recent Drafts

There are no drafts at the moment.

### WordPress Blog

[WordPress 3.5 Beta 2](#) October 13, 2012  
Two weeks after the first beta, WordPress 3.5 Beta 2 is now available for download and testing. This is software still in development, so we don't recommend that you run it on a production site. Set up a test site to play with the new version. To test WordPress 3.5, try the WordPress Beta Tester plugin (you'll want "bleeding [...]").

[WordPress 3.5 Beta 1 \(and a bonus!\)](#) September 27, 2012  
I'm excited to announce the availability of WordPress 3.5 Beta 1. This is software still in development and we really don't recommend that you run it on a production site — set up a test site just to play with the new version. To test WordPress 3.5, try the WordPress Beta Tester plugin (you'll want "bleeding edge nightlies"). Or you can download [...].

### Other WordPress News

[WordPress.tv: Andrew Spittle: WordPress as Your Publishing Hub](#)

[WordPress.tv: Aaron Campbell: Integration of WordPress With External APIs](#)

[Weblog Tools Collection: Less Spam Since Jetpack Comments](#)

[WordPress.tv: Robert Nienhuis: Planning & Prepping A Design For Development](#)

[WordPress.tv: Chris Ford: Information Architecture for WordPress](#)

Thank you for creating with WordPress. Version 3.4.2

## Some Basic Definitions

**Pages:** In WordPress, a “page” consists of content that is not often updated. For example, an “About Us,” “Testimonials,” or “Contact Us” page should be classified under pages.

**Posts:** A post is less permanent, and updated more regularly. Posts and articles are basically synonymous in this case.

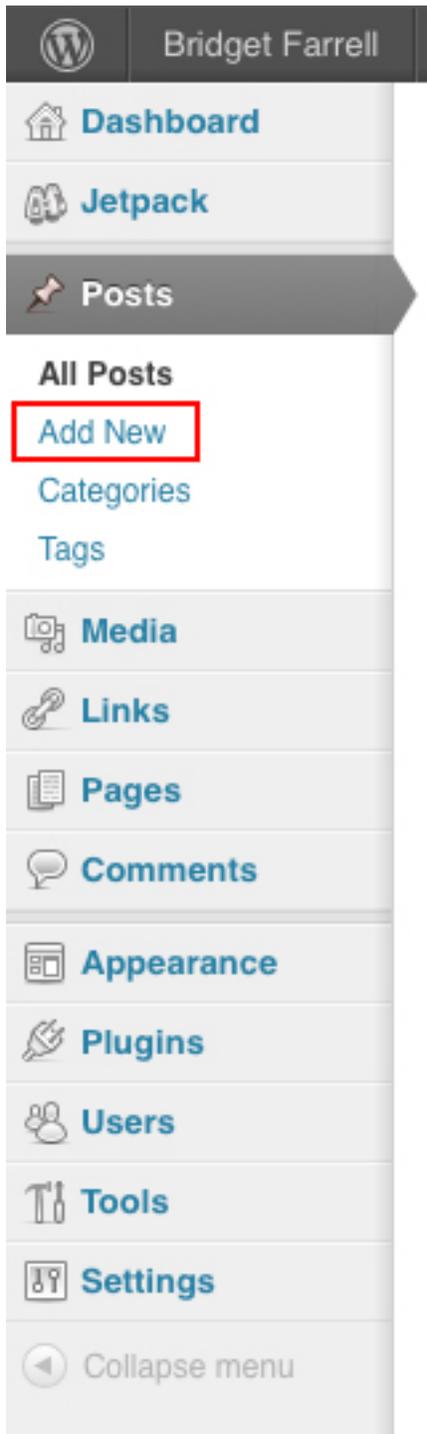
**Categories:** Categories make it easier for your users to sift through information. Categories are meant to act as general topics for your posts. A category is meant to be used repeatedly. An example of categories on Optimum7’s site may include Design, Ecommerce, SEM, or PPC.

**Tags:** Tags are meant to act as keywords for your posts. Unlike categories, a tag is meant to be much more specific, and repeated fewer times. Tags will differ from post to post. For tips on WordPress tags, check out [5 Rules for Optimizing WordPress Posts for SEO](#).

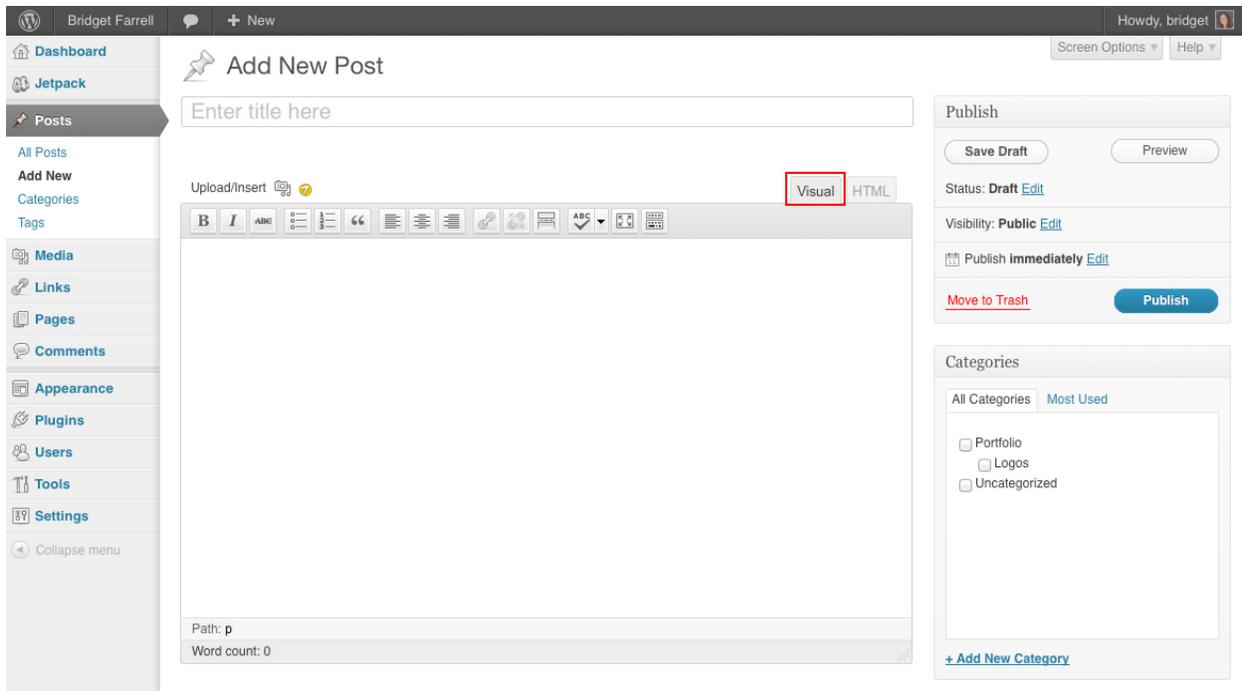
## What We’ll Be Discussing

1. Creating, editing, and publishing content (written or otherwise)
2. How to install and use WordPress plugins, and why they are important
3. How to add, edit, and delete WordPress users.

## Creating, Editing, and Publishing Post Content



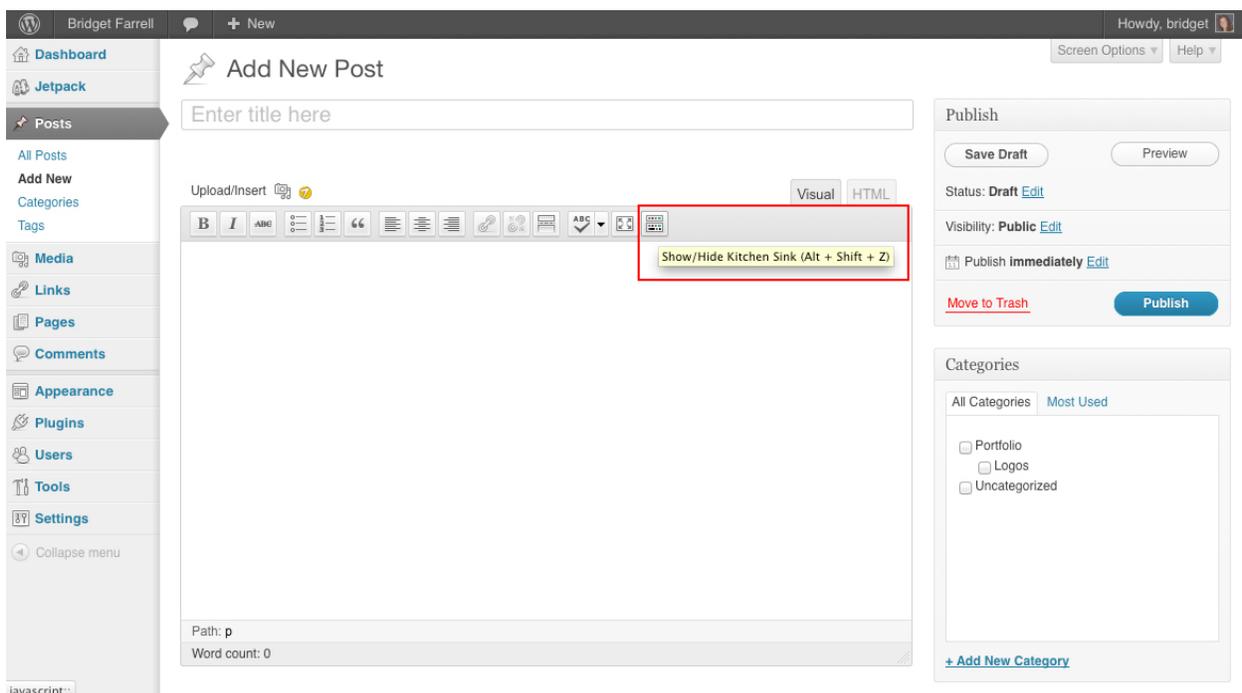
- 1- Go to the left side of the WordPress dashboard
- 2- Select Posts > Add New. This will take you to the Post interface.



3- Choose the *Visual* tab.

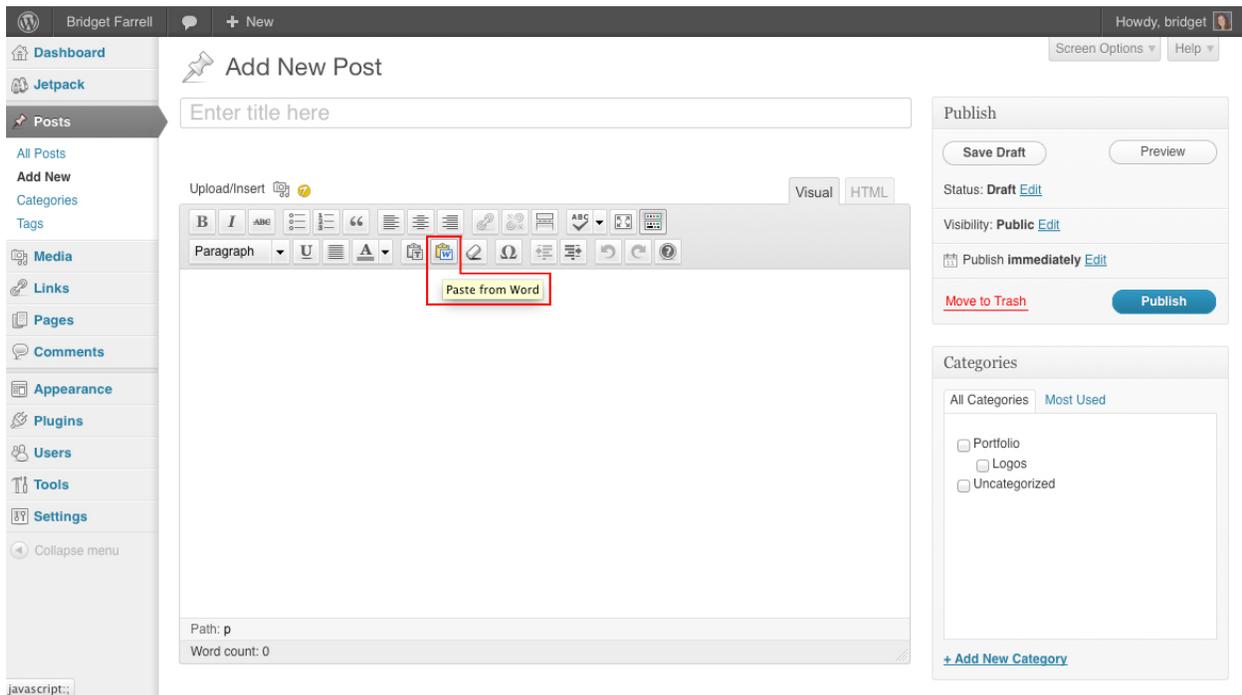
*Quick tip: make sure not to toggle between the Visual and HTML tabs while editing, as this can sometimes cause bugs within the WordPress and ultimately mess up the aesthetics of the content you are adding.*

4. Choose the *Kitchen Sink* option



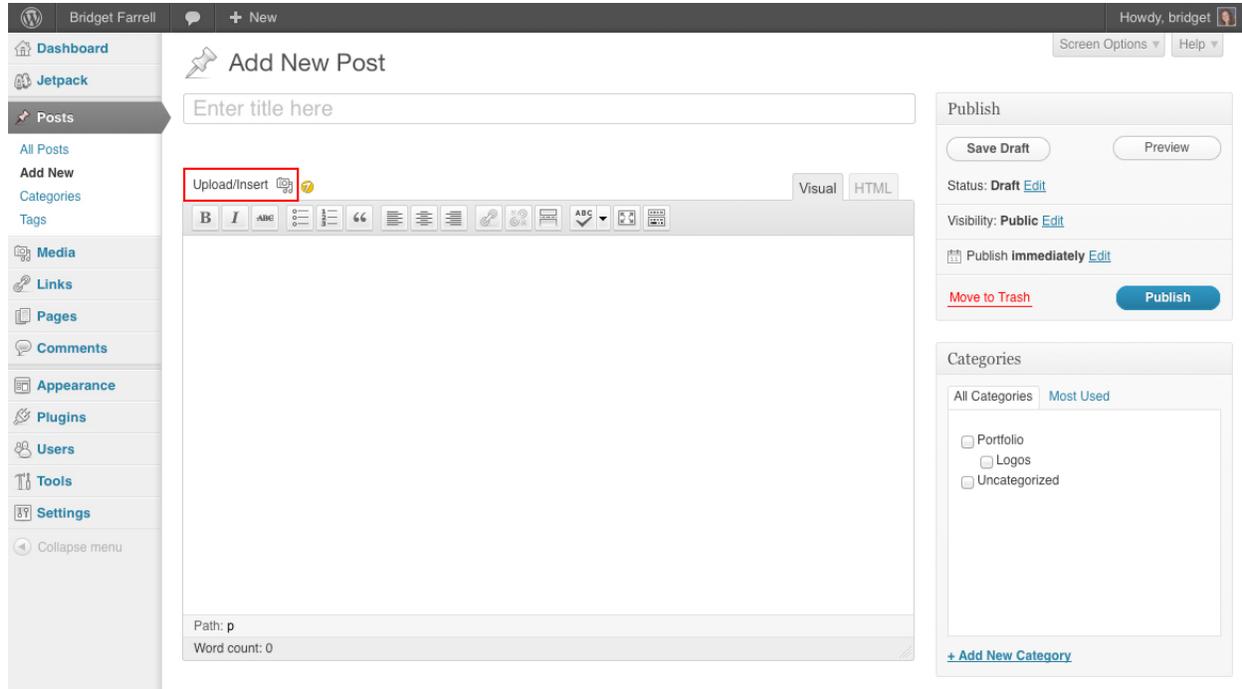
The kitchen sink opens the remaining editing tools that you will use for the post. These tools work in the same manner as any typical word processor.

*A quick tip: Copying and pasting directly from word processors like Microsoft Word can cause adverse affects on the formatting of the WordPress post. Instead, copy text into a simple text editor like Notepad, and remove all formatting, then copy to your WordPress post. Or, you can use the Paste from Word button in the editing toolbar.*



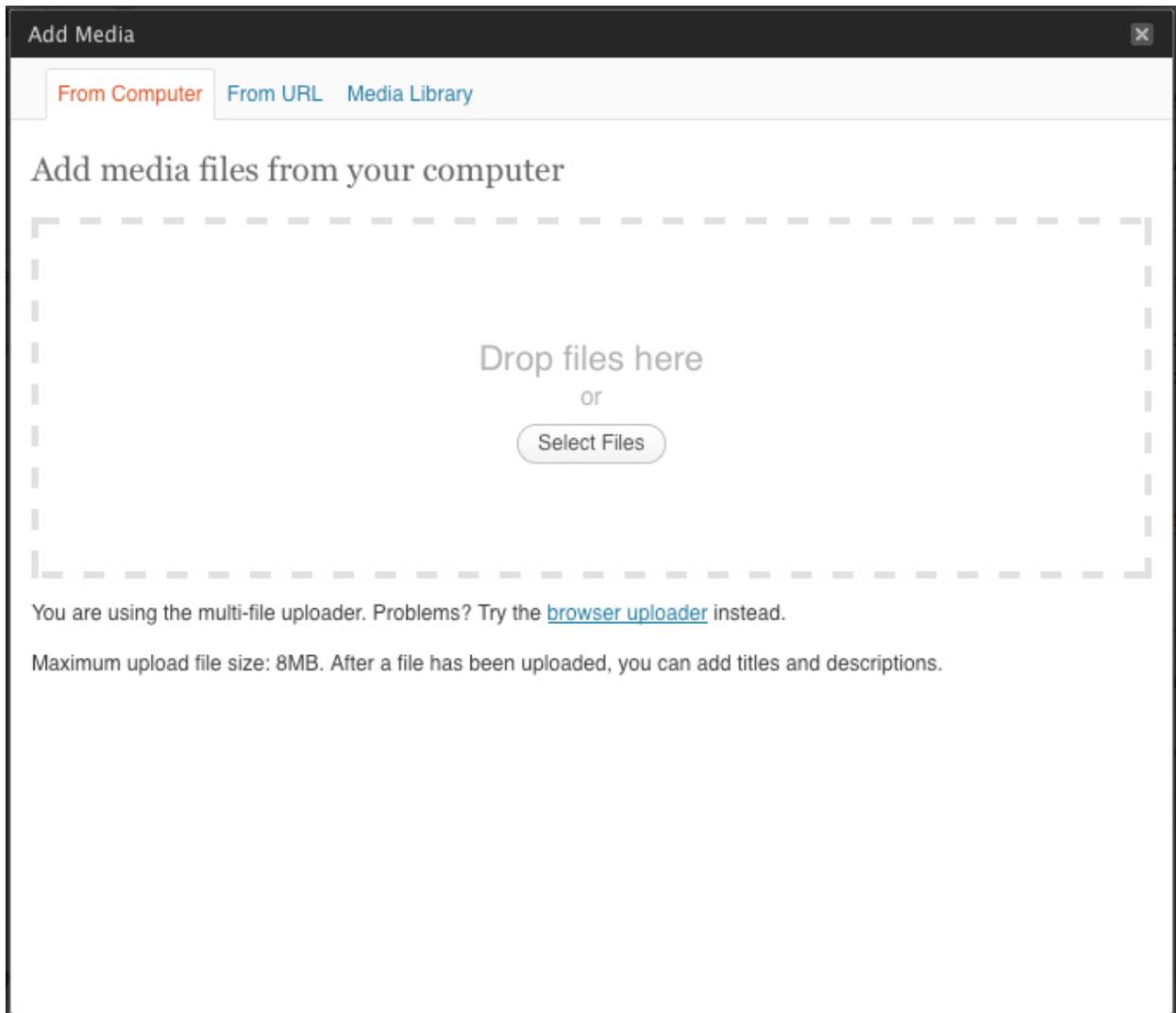
## Uploading/Inserting Media

- 1- Place cursor in the area you would like to add content
- 2- Choose *Upload/Insert* below the title area



The screenshot shows the WordPress 'Add New Post' editor. At the top, there's a header with the user's name 'Bridget Farrell' and a '+ New' button. Below that, the 'Add New Post' title is displayed. A text input field for the title is present, with the placeholder text 'Enter title here'. Below the title field is the 'Upload/Insert' button, which is highlighted with a red box. To the right of this button are 'Visual' and 'HTML' tabs. Below these is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, link, unlink, list, quote, indent, outdent) and media insertion. The main content area is currently empty. At the bottom left of the editor, it shows 'Path: p' and 'Word count: 0'. On the right side, there's a 'Publish' section with buttons for 'Save Draft', 'Preview', and 'Publish'. Below that, it shows the status as 'Draft' and 'Public', and a 'Publish Immediately' button. At the bottom of the right sidebar, there's a 'Categories' section with a list of categories: 'Portfolio', 'Logos', and 'Uncategorized', each with a checkbox. A '+ Add New Category' link is at the bottom of the categories list.

- 3- This will bring up the *upload/insert* media popup. Here you will have three ways to add media to the post: *From Computer*, *From URL*, and *Media Library*. Toggle between the tabs, and see below for more information about each tab.



**Add Media From Computer:** To add media from your computer to your website, you will choose this option. Simply drag and drop the file(s) you'd like added to your post, or click *Select Files* and add the media just as you would add an attachment to an email. Fill in the remaining required fields and click *Insert Into Post*.

Add Media ✕

[From Computer](#) **[From URL](#)** [Media Library](#)

### Insert media from another website

Image  Audio, Video, or Other File

**URL** \*

**Title** \*

**Alternate Text**   
*Alt text for the image, e.g. "The Mona Lisa"*

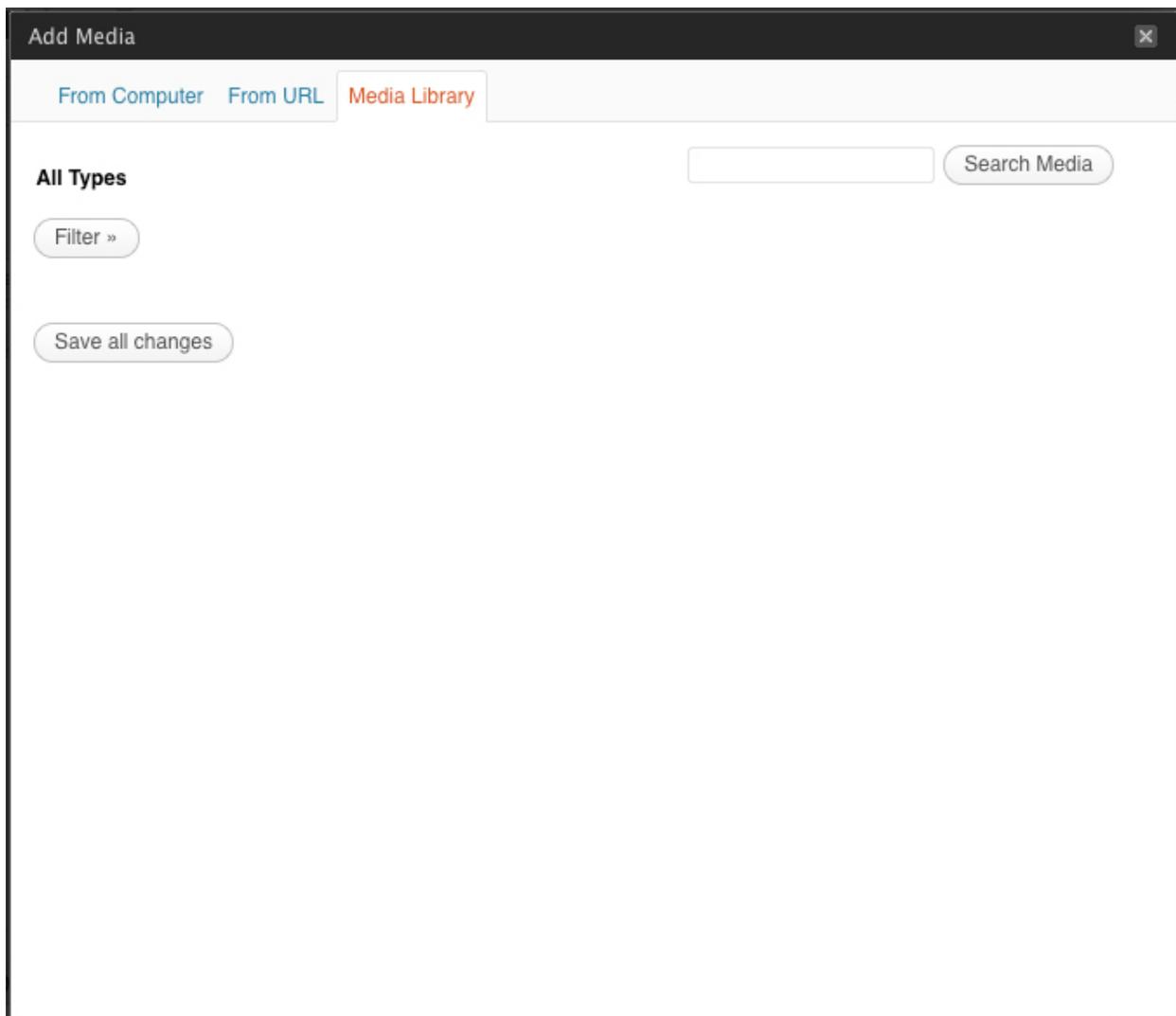
**Image Caption**

**Alignment**  None  Left  Center  Right

**Link Image To:**

*Enter a link URL or click above for presets.*

**Add Media From URL:** If you'd like to add an image that is already on the web to your site. Simply grab the URL of that image, and insert it into the *URL* field. Fill in the remaining required fields and click *Insert Into Post*.



**Add Media From Media Gallery:** If you have previously uploaded a file to your site and would like to insert it on this post as well, you can do this by accessing the *Media Gallery* tab. Scroll through the existing media, and choose the correct file. Fill in the remaining required fields and click *Insert Into Post*.

## Selecting and Adding Categories

- 1- To select a category, go to the right side of the post interface.
- 2- You can add a category to your post by selecting the checkbox next to a previously used category.
- 3- To create a new category, select *+ Add New Category*.
- 4- This will open up the new category field, which you can fill in with the new category of your choice.
- 5- Click the *Add New Category* button to save the category.

### Categories

All Categories **Most Used**

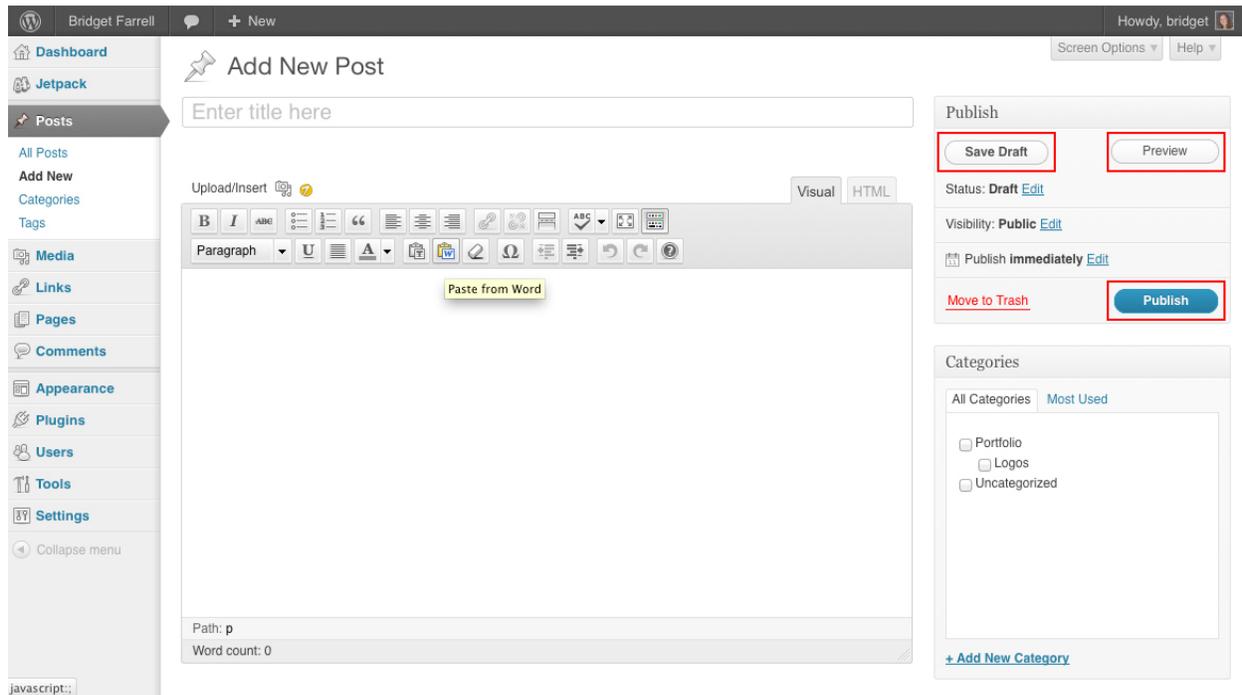
- Portfolio
  - Facebook
  - Logos
  - Websites
- Uncategorized

[+ Add New Category](#)

— Parent Category — ▾

Add New Category

## The Save Draft, Preview, and Publish Options



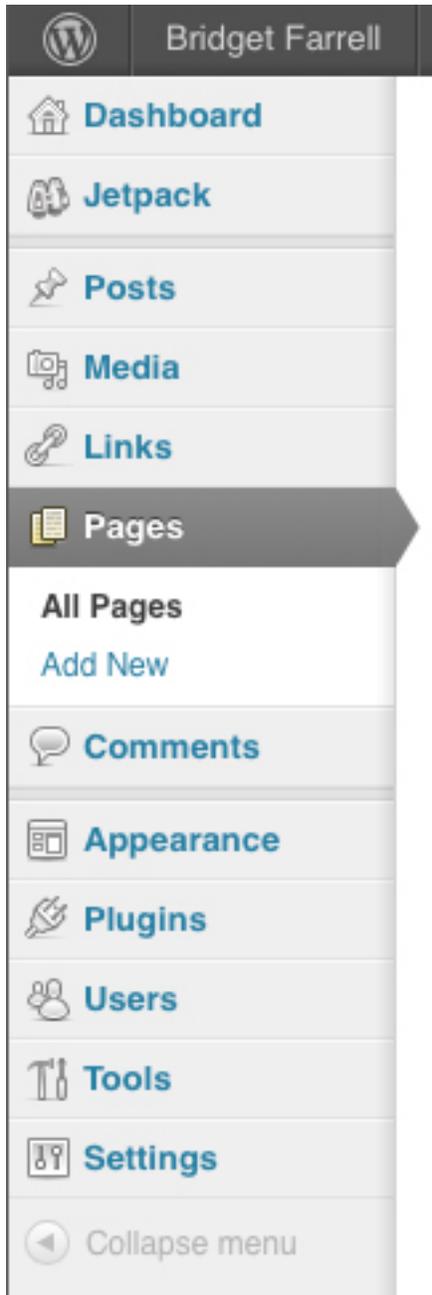
**Save Draft:** Saving a draft on WordPress is very similar to saving a draft of an email. By simply clicking *Save Draft*, the changes you have made to the post will be saved within the backend of WordPress, and those changes will not be shown on the sight for visitors to see. This is especially useful when there is an approval process on content that goes on to the site.

**Preview:** The *preview* button allows you to view how the post will look on your site within your browser. This is useful when checking to see how images are lining up, or to double check whether links are working properly.

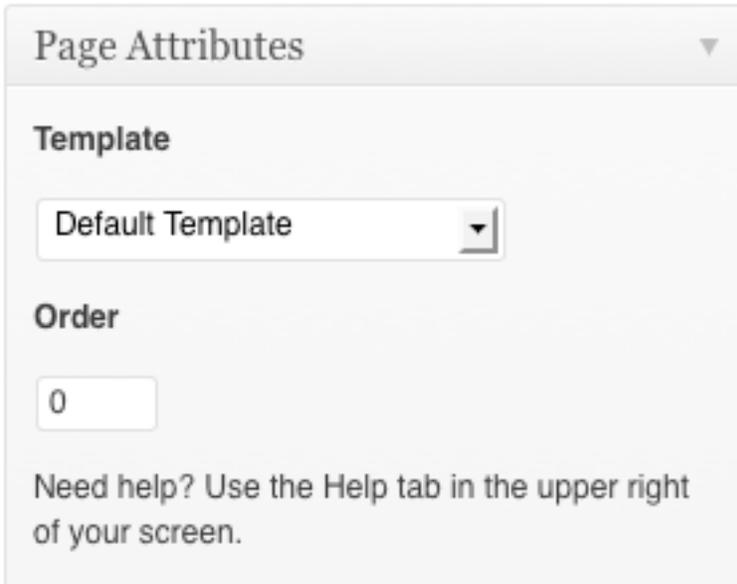
**Publish:** To make a WordPress post immediately visible to the public, you simply click *Publish*. If you wish to schedule your posts ahead of time, click the *Edit* button next to Publish, and you can choose the precise date and time you'd like your post published.

## Creating, Editing, and Publishing Page Content

The process for adding and editing a WordPress page is nearly identical to that of a post. There are truly only two main differences you will need to understand about adding and editing pages. Firstly, you will go to the *Pages* menu on the left side of the dashboard instead of the *Posts* menu.



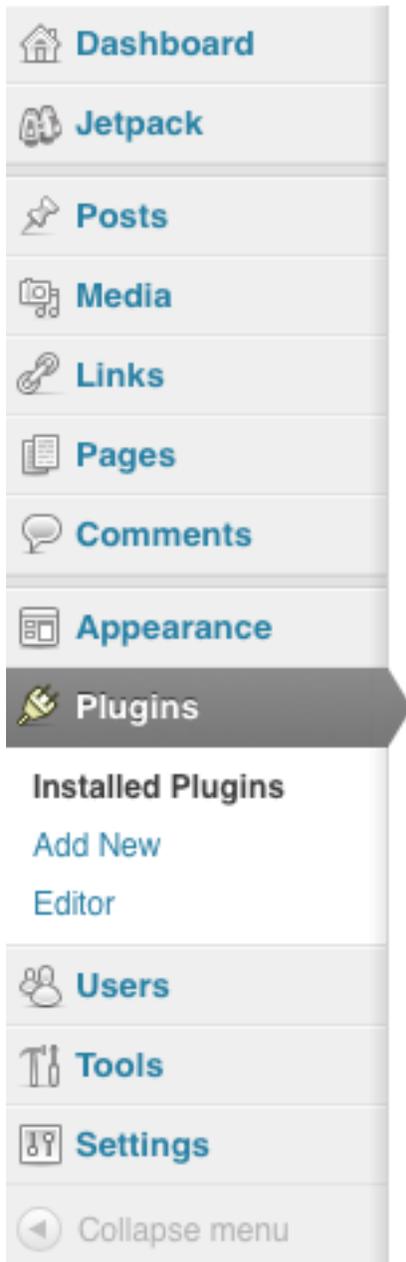
Secondly, and more importantly, DO NOT touch the *Page Attributes* box on the right side of the *Page* interface. This controls the HTML and CSS of your site, and can ultimately mess up the aesthetics of your site.



The image shows a 'Page Attributes' panel with a dropdown arrow in the top right corner. It contains two sections: 'Template' with a dropdown menu currently showing 'Default Template', and 'Order' with a text input field containing the number '0'. At the bottom, there is a help message: 'Need help? Use the Help tab in the upper right of your screen.'

## Searching for and Installing Plugins

- 1- To search for a plugin, access the *Plugin* menu on the left side of the dashboard and select *Add New*.



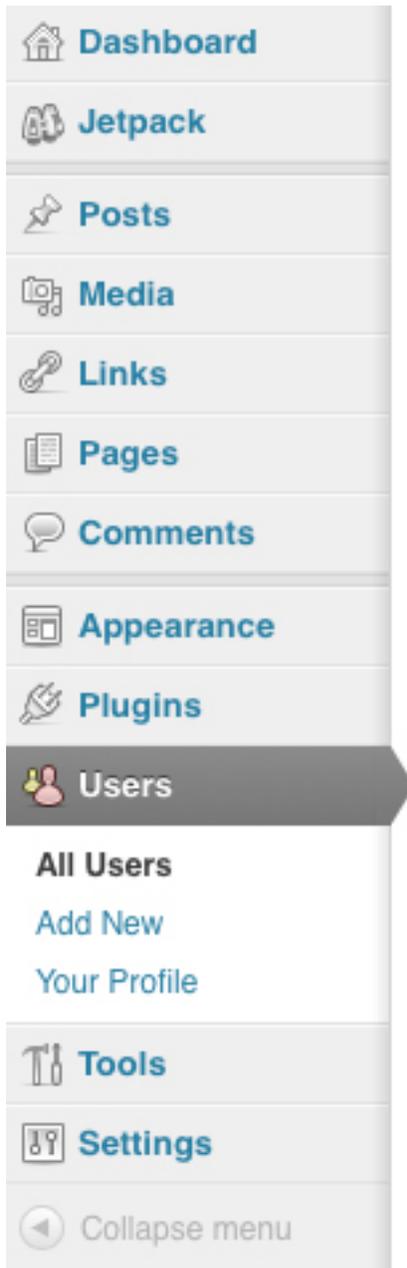
- 2- This will take you to the *Add New Plugin* interface, where you can use the search bar to find plugins by name or keyword.
- 3- During your search, you will most likely find several dozen plugins that seem to fit your needs. This is where the WordPress rating system comes in handy. WordPress users review plugins, and

award between 0 and 5 stars (5 stars being the best) to each plugin. As a generalization, plugins with higher ratings are better. However, your needs may differ from that of other users, so there is a chance you will need to read up on and test several plugins before finding the perfect fit.

- 4- To install a plugin, click *Install Now* beneath the plugin's title.
- 5- A pop-up will open, asking if you are sure about installing the plugin. Click OK.
- 6- You will be brought to a new page, and your plugin will most likely be installed in less than twenty seconds. Click *Activate Plugin*, and you are on your way.
- 7- Each plugin has a different interface, and some have none at all. However, you will most likely be able to edit the settings of a plugin (if the plugin has settings) on the left menu.

## **Adding Users**

1- Choose the *User* menu from the left menu, and select *Add New*.



- 2- The *Add New User* interface will open, and it is here that you will create your new user.
- 3- The only three options required are a username, email address, and password. I suggest using a username that is either a first or last name of the user to prevent confusion, a company email address, and a randomly generated password for security purposes.
- 4- You will also need to choose the role of the WordPress user. According to the [WordPress Codex](#), there are six types of roles:
  - **Super Admin:** Someone with access to the blog network administration features controlling the entire network

- **Administrator:** Somebody who has access to all the administration features
- **Editor:** Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
- **Author:** Somebody who can publish and manage their own posts
- **Contributor:** Somebody who can write and manage their posts but not publish them
- **Subscriber:** Somebody who can only manage their profile

- 5- After filling the required fields, you can click the *Add New User* button to save this user.
- 6- If you'd like the login information to be sent directly to the new user's email address select the *Send this password to the new user by email* option.

**WordPress Resources**

<http://wordpress.tv/>

<http://wordpress.org/support/>

<http://codex.wordpress.org/FAQ>

## **Q&A**

Do you have any questions?