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 WordPress Dashboard

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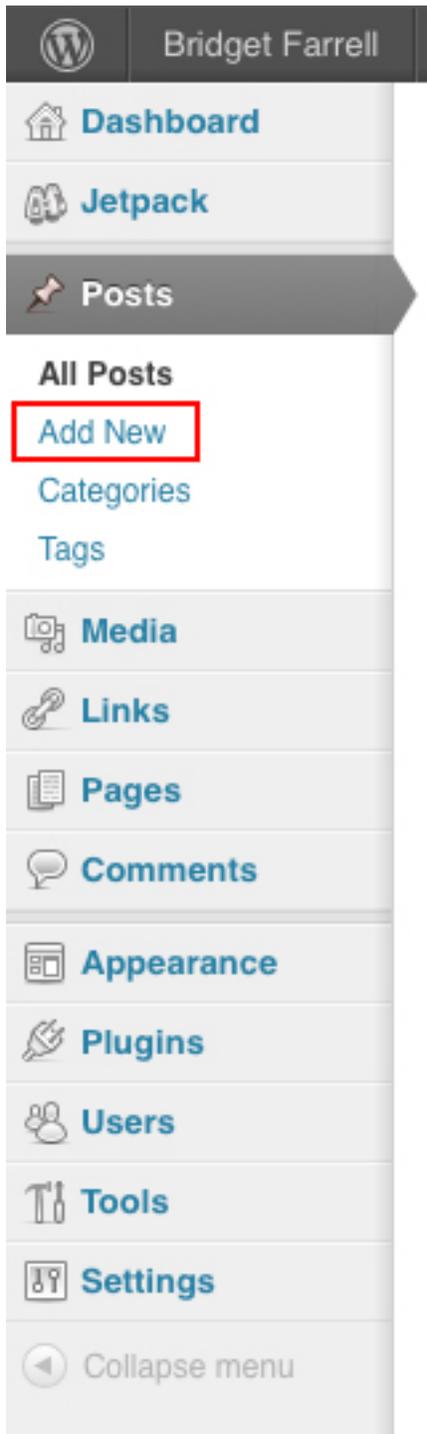
1- Go to the left side of the WordPress dashboard
2- Select Posts > Add New. This will take you to the Post interface.
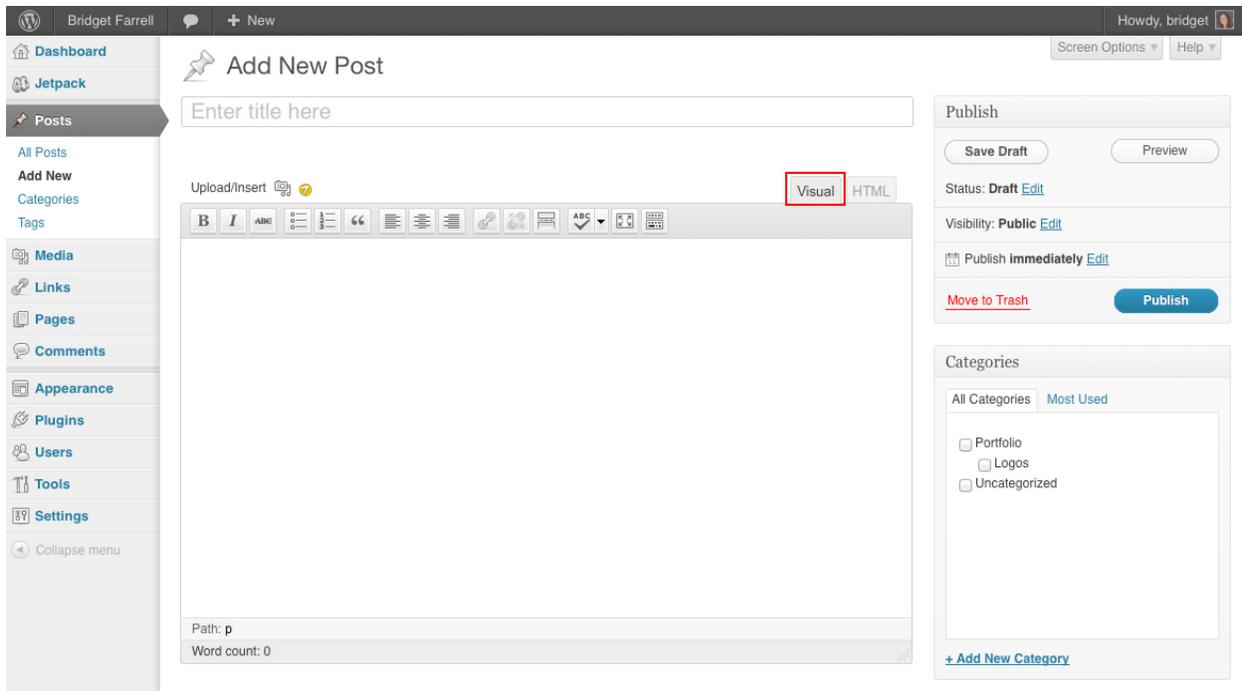
3- Choose the *Visual* tab.

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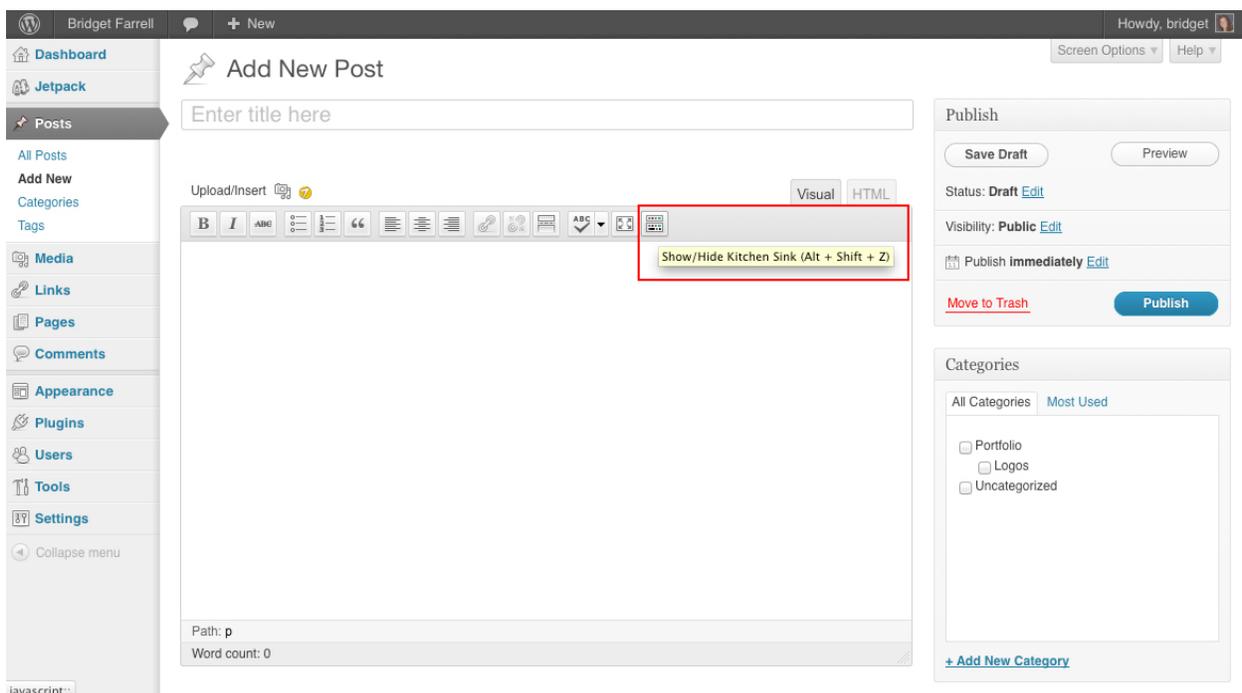
The kitchen sink opens the remaining editing tools that you will use for the post. These tools work in the same manner as any typical word processer.

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.
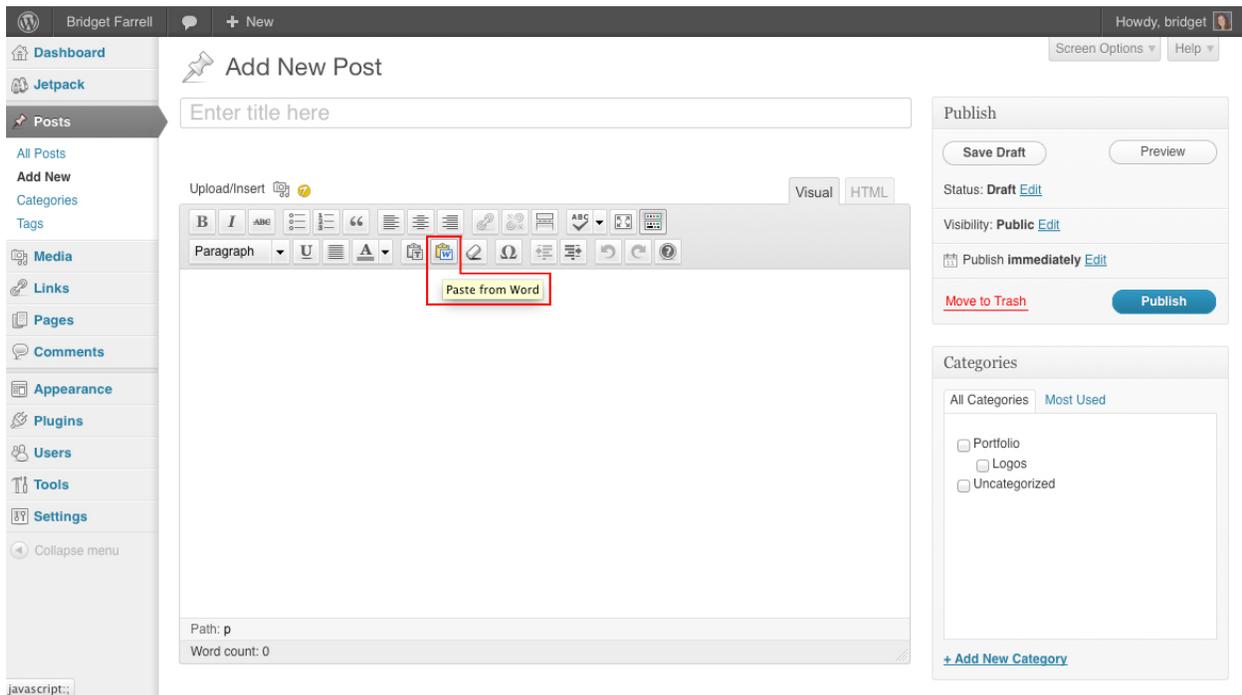
Uploading/Inserting Media

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

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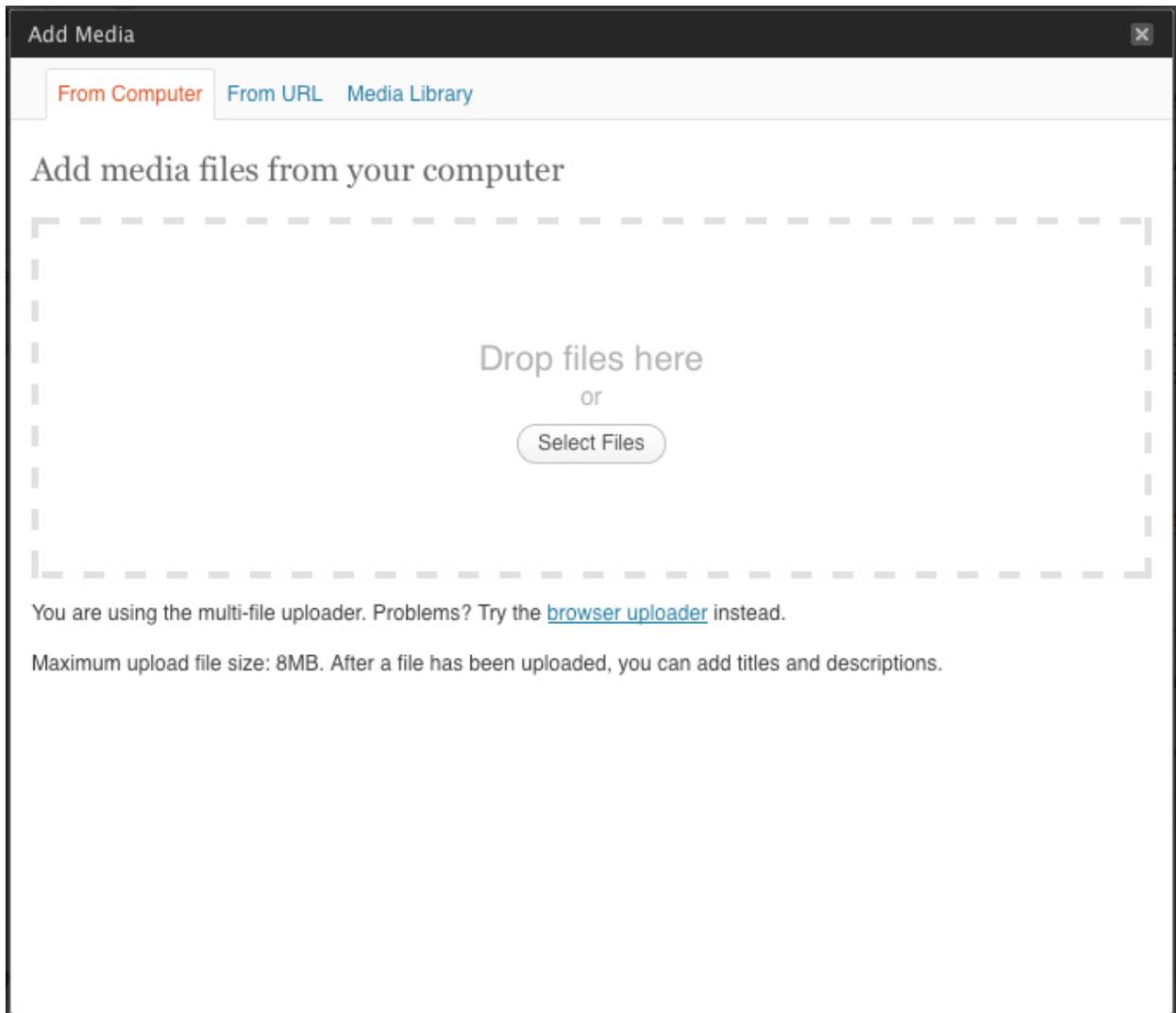
Add Media From Computer: To add media from your computer to your website, you will choose this option. Simply drag and drop the file(s) you'd like added to your post, or click *Select Files* and add the media just as you would add an attachment to an email. Fill in the remaining required fields and click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

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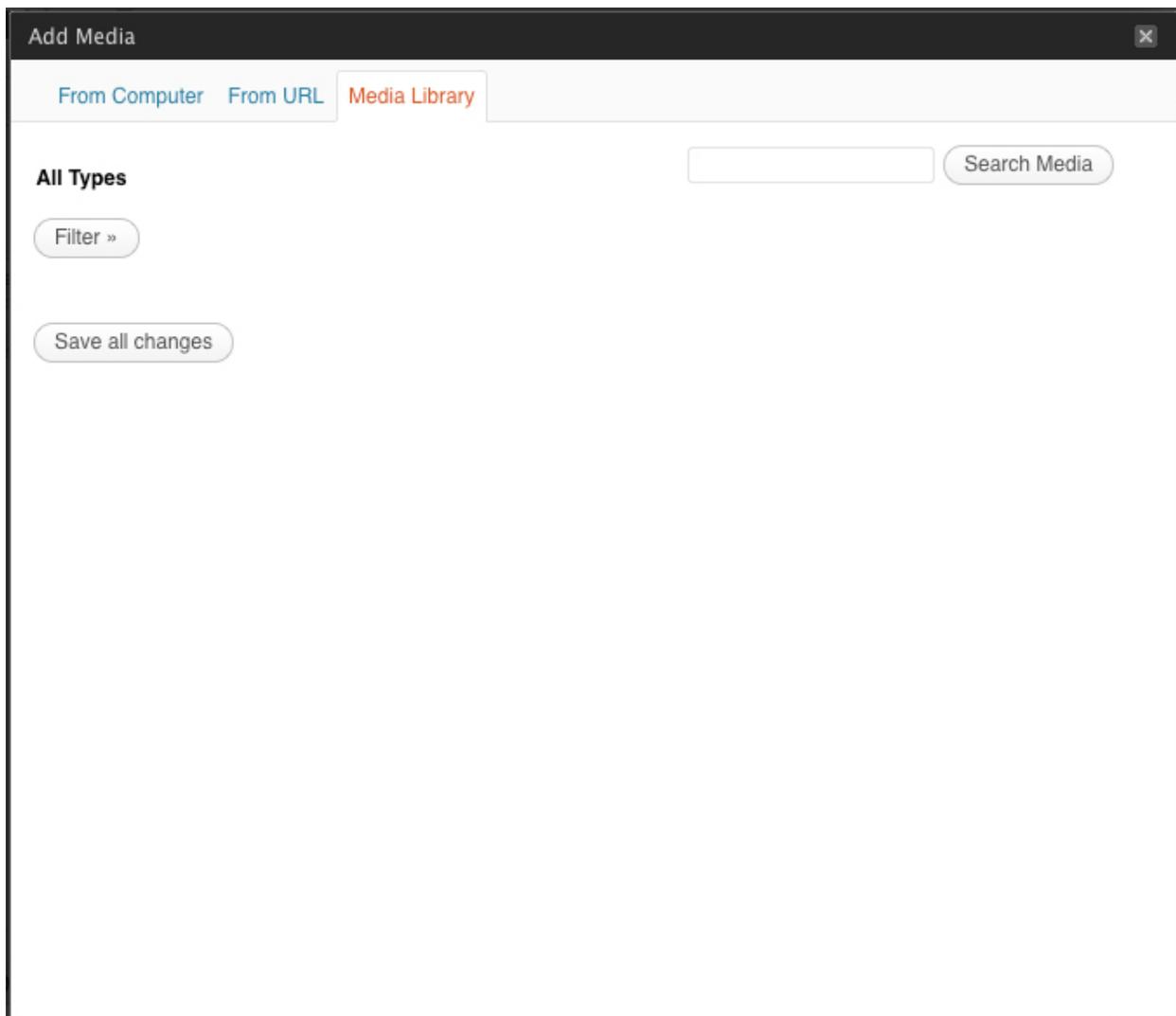
Add Media From Media Gallery: If you have previously uploaded a file to your site and would like to insert it on this post as well, you can do this by accessing the *Media Gallery* tab. Scroll through the existing media, and choose the correct file. Fill in the remaining required fields and click *Insert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

The *Save Draft*, *Preview*, and *Publish* Options
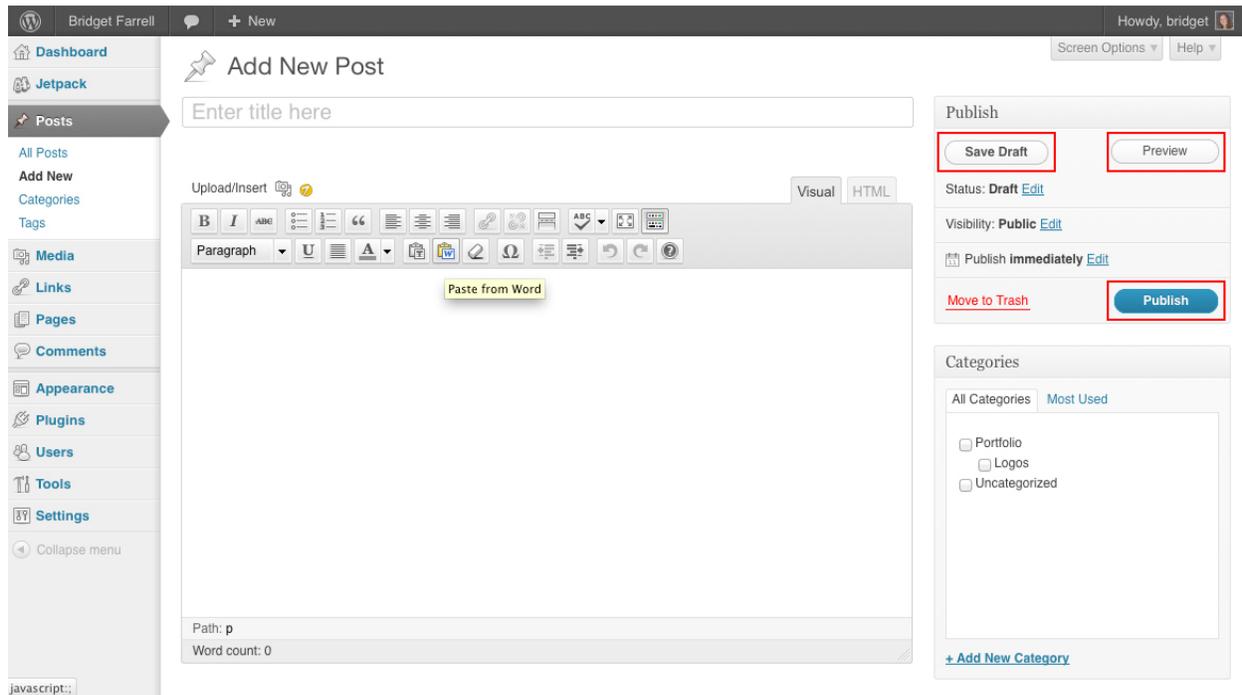
Save Draft: Saving a draft on WordPress is very similar to saving a draft of an email. By simply clicking *Save Draft*, the changes you have made to the post will be saved within the backend of WordPress, and those changes will not be shown on the sight for visitors to see. This is especially useful 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.
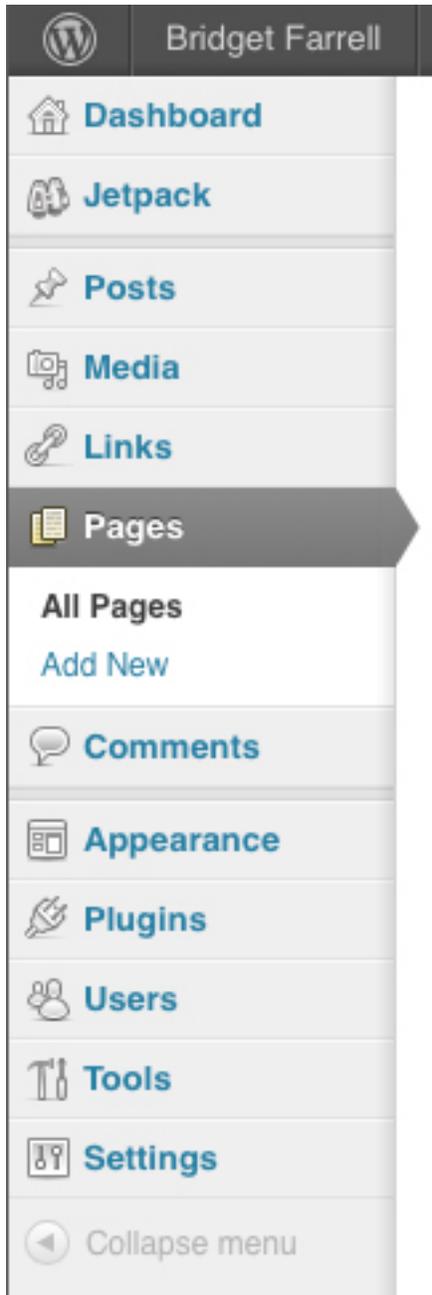
Secondly, and more importantly, DO NOT touch the *Page Attributes* box on the right side of the *Page* interface. This controls the HTML and CSS of your site, and can ultimately mess up the aesthetics of your site.
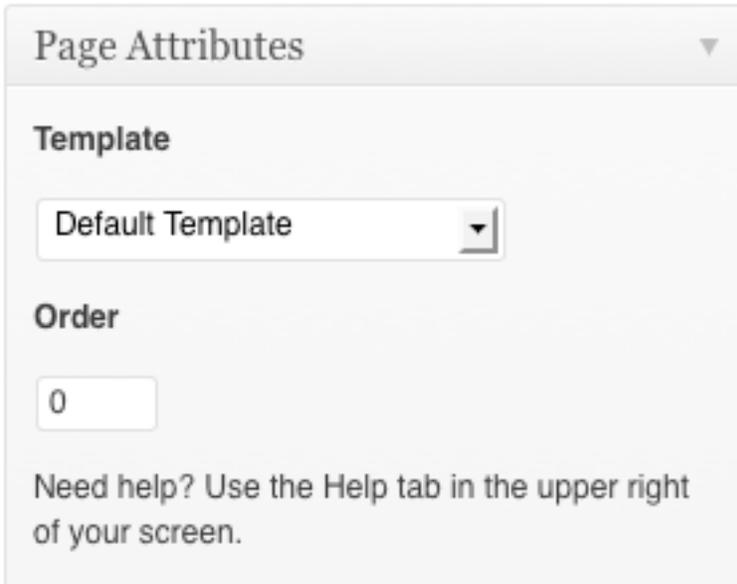
Page Attributes

Template

Default Template

Order

0

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*.
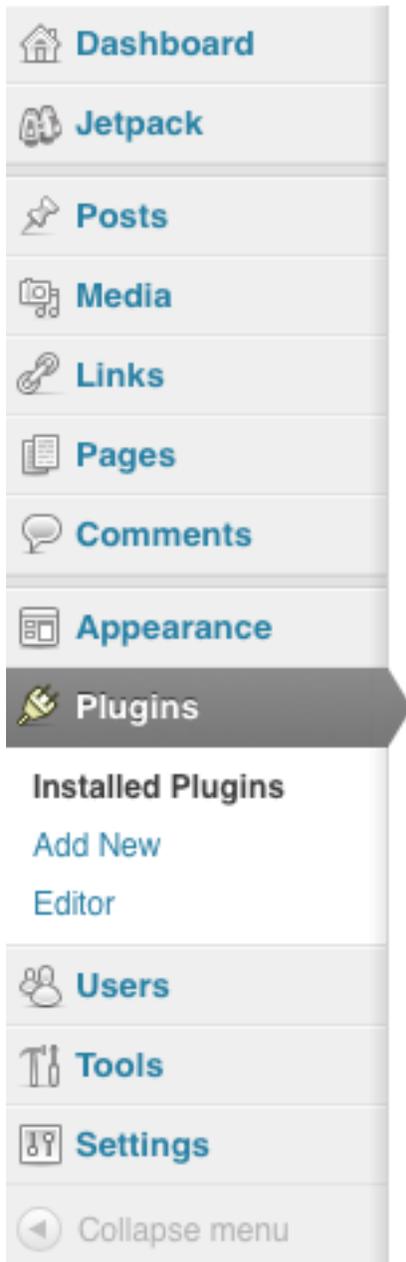
2- This will take you to the *Add New Plugin* interface, where you can use the search bar to find plugins by name or keyword.

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.*
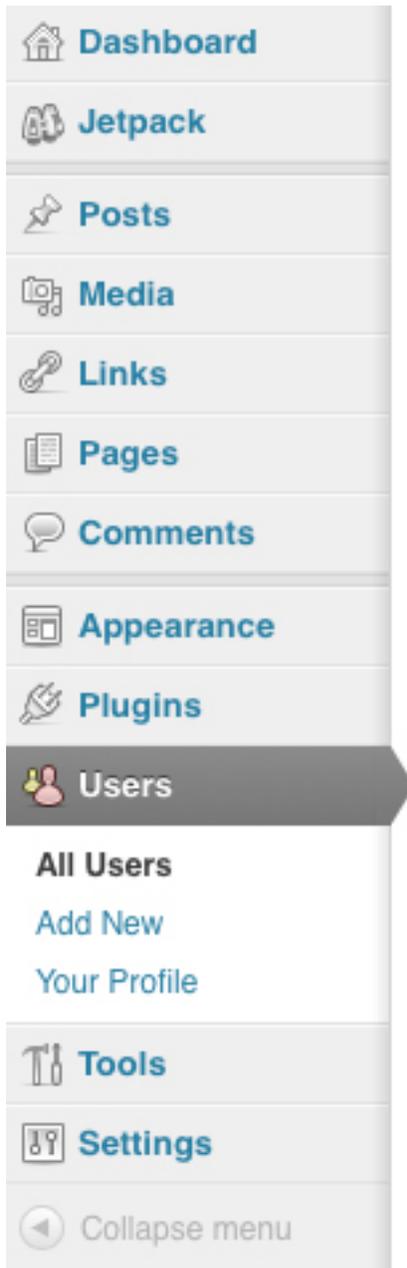
2- The *Add New User* interface will open, and it is here that you will create your new user.
3- The only three options required are a username, email address, and password. I suggest using a username that is either a first or last name of the user to prevent confusion, a company email address, and a 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?