Wordpress
User Manual

*Putting **YOU** behind the wheel of your website, and giving you the keys to drive.*

Bishop Design

Creative · Fast · Easy to work with

Wordpress User Manual:
Putting YOU behind the wheel of your website, and giving you the keys to drive.

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About This Guide

This guide is intended to be an overview of how to use the back-end of Wordpress to maintain the content of a Wordpress website, as well as a few other features. It is not exhaustive by any means, but primarily intended as a resource for my clients, once I've designed and implemented a website for them, to take the upkeep of the website into their own, capable hands. It is geared towards how to add content such as text, images, and video, as well as manage comments. My hope is that this will be an easy-to-follow guide that is useful. Maintaining your own website will often be more time-efficient and cost-effective than hiring someone else to maintain it for you.

Introduction to Wordpress

Wordpress is a powerful yet user-friendly Content Management System for building and maintaining websites. While it started out as a blogging tool, it has evolved far beyond a simple journal tool into a database-driven, media-rich, feature-rich website builder, and is as easy to use--almost--as a text editor. It is by far the most popular CMS out there, and according to Web3 Techs, is used by more than 23% of the top 10 million websites in the world as of October 2014.[1] It is free and open-source software, meaning that developers around the world are constantly making improvements to it, adding features (by writing lots of plugins, a lot of which are free, or have free scaled-down versions, on wordpress.org), etc. Best of all, you don't have to know code to maintain a website. Wordpress organizes by taxonomy, categorization, which becomes important for SEO (Search Engine Optimization).

Logging in

When your website is set up through Wordpress and linked to your domain, the address you'll want to log in to get to the inner workings of your website will be:

https://www.your-domain-name.com/wp-admin

Basically, as you can see, it is just "*/wp-admin*" appended to the end of your domain name. If you have a wordpress.com site, it will be after the name of your site.wordpress.com.

When you access that page, at least the first time (and also when you've been logged out for a while, or using a different browser to access the site), you will see a login screen such as the screenshot on the left. Be sure to keep a record of what your username and password for your website in Wordpress. Once you enter your user name and password and click "Log in," you will enter the Dashboard of your website.
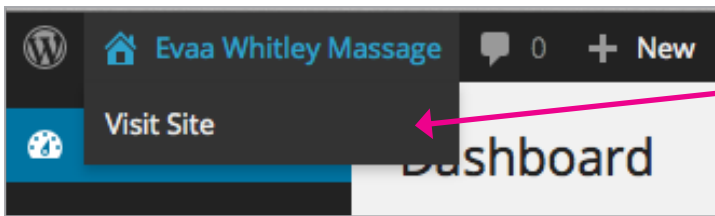
The Dashboard

The Dashboard is the where it all happens, the "back end" as they say, of Wordpress. There is a true back end, actually, consisting of the MySQL database where all the information is stored, as well as the Wordpress "engine" to communicate with that database and a content folder including themes and plugins, but the Dashboard is your user interface to the true back end.
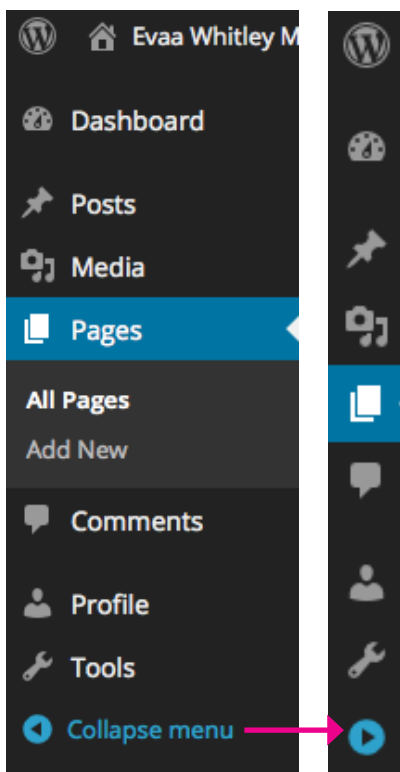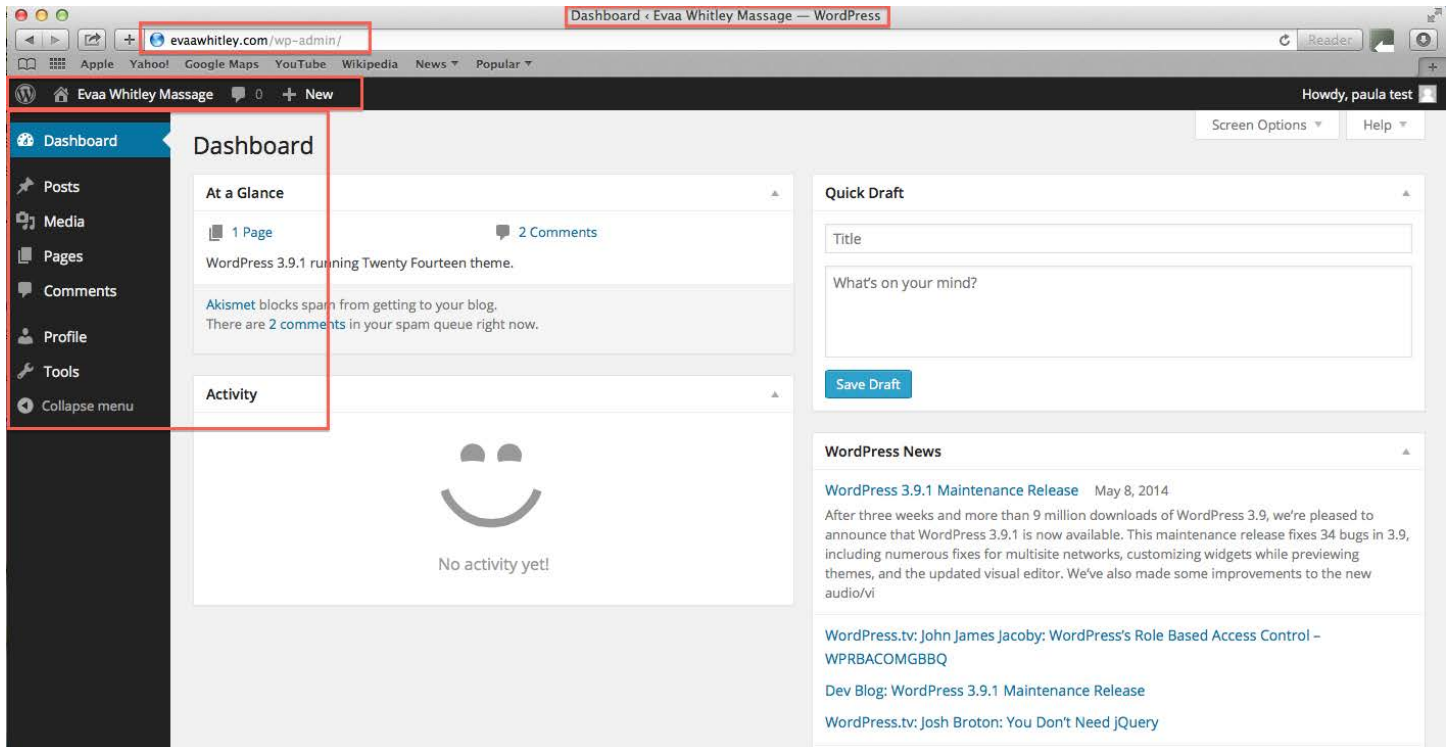

There are a lot of helpful links in the main "content" area of the Dashboard, of course, and I would encourage you to just explore and play around. In that area it will have links to modifying what page is the "landing page" of your site--the "Front Page," as it's called. By default, it's where your posts go, but you can change that, and designate a different page (you have to create one first, though) for posts to go (I usually name this "Blog" or "Journal" or even "Latest News").

For this section, however, I'd like to focus on the left-hand sidebar, where most of the navigation is. While you can have themes on the front end (the side of your site the world sees) with sidebars in a variety of places, the Dashboard will always look the same, as it is the "admin" side, which does not get customized (as of this writing), except to be able to "Collapse Menu" to icon view on the left hand side. Clicking the Collapse icon again (see screenshot at left) will un-collapse the menu back to icons with titles.

Notice that there is a little carat next to the Header in the Content, pointing to the appropriate section in the navigation sidebar, as well as sub menus for that section (in this case, "Home" and "Updates") that help let you know where you are in the Dashboard at all times. Clicking the house (home) icon

on the top navigation bar will take you to the front end of your site.
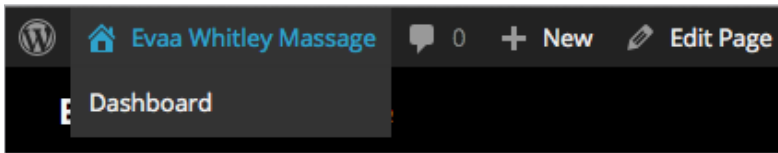
From your website, too, there are several quick links back to the Dashboard (but only if you're currently logged in) which is accessible through the top navigation bar, the sidebar ("Site Admin" under "Meta"), and through every "Edit" link you see in a page or post in your site.
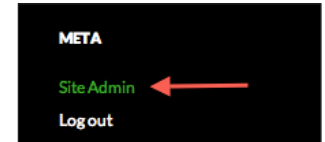
From the black top navigation bar in either your site or from Dashboard, you can also add or edit--or more correctly, navigate to where you can add or edit posts or pages.

Adding Content

Content is what a Content Management System is all about--to make it easy to add and edit content. There are two types of "containers" for content--Posts, and Pages. Posts are added dynamically, shifting in position when new posts are added, to prioritize the most recent Post first. Pages, on the other hand, are static, and only change when you specifically change them.

Posts

Posts are the content type most often used by Bloggers, and on a static site, they can be used for blogging, journaling (turning comments off completely), or posting news and/or updates. One real benefit of using Posts for doing updates is that your site will be more visible to Search Engines if it is being updated continually, as they way search engines work (or so we guess, because the algorithms they use are shrouded in mystery), is to send automated "bots" throughout the web, spider-like, which crawl around and index sites by when they were updated last, on the premise that what is most recent is most relevant, and also sites that are frequently updated may be considered more "dynamic."
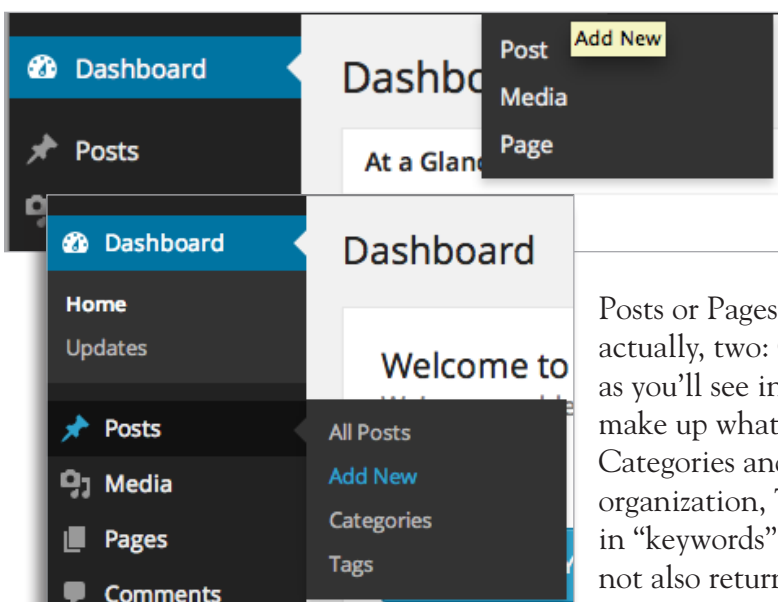
Adding New Posts can be done from the top menu navbar, as discussed above, as well as from the Dashboard sidebar.

Categories and Tags

(Taxonomy organization)

One important consideration on whether to use Posts or Pages is that Posts offer another level of organization-- actually, two: Categories, and Tags. This can be very powerful, as you'll see in Menus, but for right now, know that you can make up whatever Categories you like, you can assign multiple Categories and Tags to each Post. Categories are the first level of organization, Tags are the second. Tags are more of a way to add in "keywords" that users might search for--not that a search will not also return Categories, but that with the way Wordpress uses

Categories to organize posts, offering an immediate way (from the sidebar, usually) to see all of the posts in that Category, Tags are just icing on the cake, a way to add some more searchable words to your Posts.
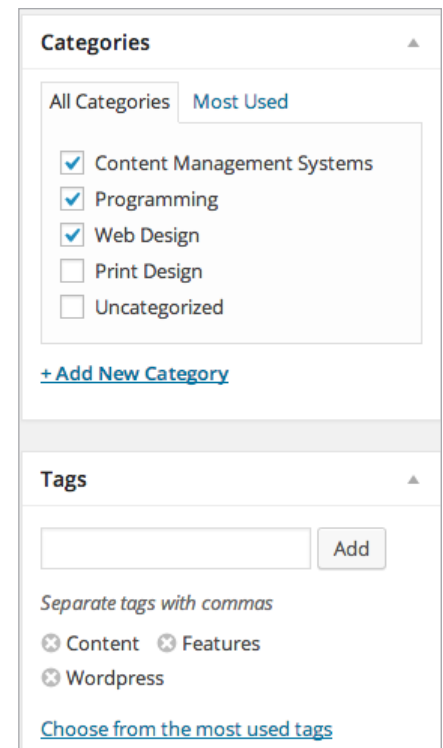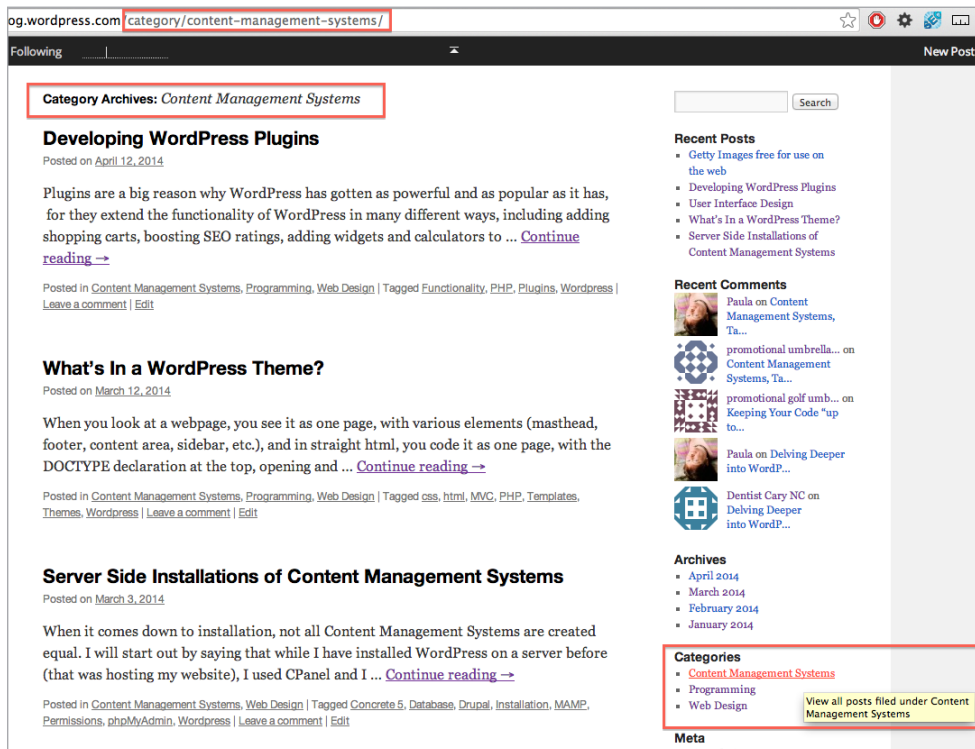

While Categories get saved and are always visible on the lower right hand side of the Post editing area, Tags (which can be anything, including multiple words with spaces in-between) will offer you the option to "Choose from the most used tags" (see screenshot at above right).

Pages

Pages are static and dependable, and the look of them can be somewhat customized, depending on the theme, for you can have a wider page to fit more content, by excluding the sidebar, which more often has information about posts on it, anyway (see screenshot at right). Pages do not use Categories or Tags for their organization. Instead, you can designate a "parent" page, for instance, if you create a "Cookbook" page, and then wanted to have different child pages (i.e. Desserts), you would create the parent page first, and then when creating the child page, choose "Cookbook" from the drop-down for the "parent" page.
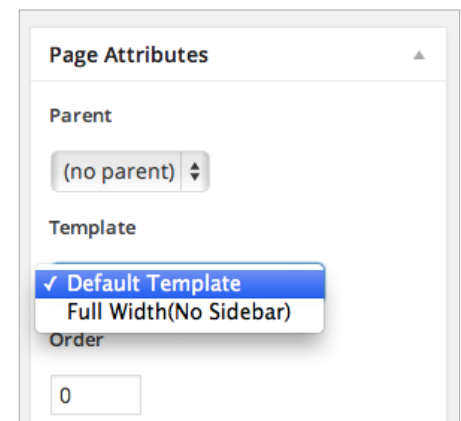
When you add Pages to your site, by default they will show up in the Main Menu navigation in your site, so designating "child" pages will reflect in that navigation, by having them be a sub-menu item drop-down to the parent. Categories can be in the main menu, too--it depends on how the menu was set up by the Admin of the site. One way to tweak in what order Pages appear in your menu bar is to change the "Order" under Page Attributes (Order is barely covered by the drop-down above, but the "0" is visible. "0" is the default, and if all the Pages are set to 0, their order will be determined by when they were added. But you can easily change this, by changing the Order number--0 is closest to the left, and whatever is higher than that goes to the right. So if you have 5 Pages at "0" and set one of them to "1", that last page will be on the far right. Better to number

them 0, 1, 2, 3, 4, for example, if you would like to change the order of where they appear. Keep in mind that Categories can also be menu items, and they might change order if you do this. If this is the case, and you'd like to change the order of how things appear in the Navigation, it might be best to consult the administrator who set up the site.

Using the Editor

One of the main advantages of any Content Management System is that one does not need to know html (though it helps) to add content. If you can get along in a word processor, you can usually get along fine. As we've seen, it's easy to get to the editor for a Page or a Post from the site itself ("Edit"), or from Dashboard. You can choose to edit a Page or Post from the overview screen of All Posts or All Pages, as well, though you need to mouse ("hover") over the title to see the option to "Edit."

Wordpress has two editing modes, defined by two tabs on the right in the Main Content editing area of either Posts or Pages, called "Visual" and "Text."

Visual Editor

Often "Visual" is the tab you'll want--that's the one that looks more like a word processor. You just type in the text area. Clicking on the "stacked" icon on the right expands another level of formatting in the menu bar, including access to Paragraph (body copy), Header, sub-header styles, etc., each displayed with a preview of how they look. You can mouse over each icon to see a pop-up of what that icon/style is for.

Text Editor

The Text tab, on the other hand, is one you probably won't use as much, unless you know some code.

```
b   i   link   b-quote   del   ins   img   ul   ol   li   code   more   close tags

<h1><span style="font-size: 16px; font-weight: 400; line-height: 1.5;">I will start out by saying that while I have installed Wordpress on a server before (that
was hosting my website), I used CPanel and I remembered it being incredibly easy.</span></h1>
This process of doing it via ftp was not quite as simple, and I had to tweak some permissions (possibly opening myself up to a host of security issues in the
process), but really Wordpress was still pretty painless when compared with Drupal's installation process.
<h2>The Process</h2>
```

As you can see from the example, it defaults to html, with some in-line styling applied. Not exactly user-friendly.

Adding Media (photos)

Inserting pictures into your posts in Wordpress is really easy. If you look at the screenshot on the previous page, right above the Editor & styles to the left is a button called "Add Media." Click that, and it takes you to the Insert Media pop-up window, similar to the screenshot below.
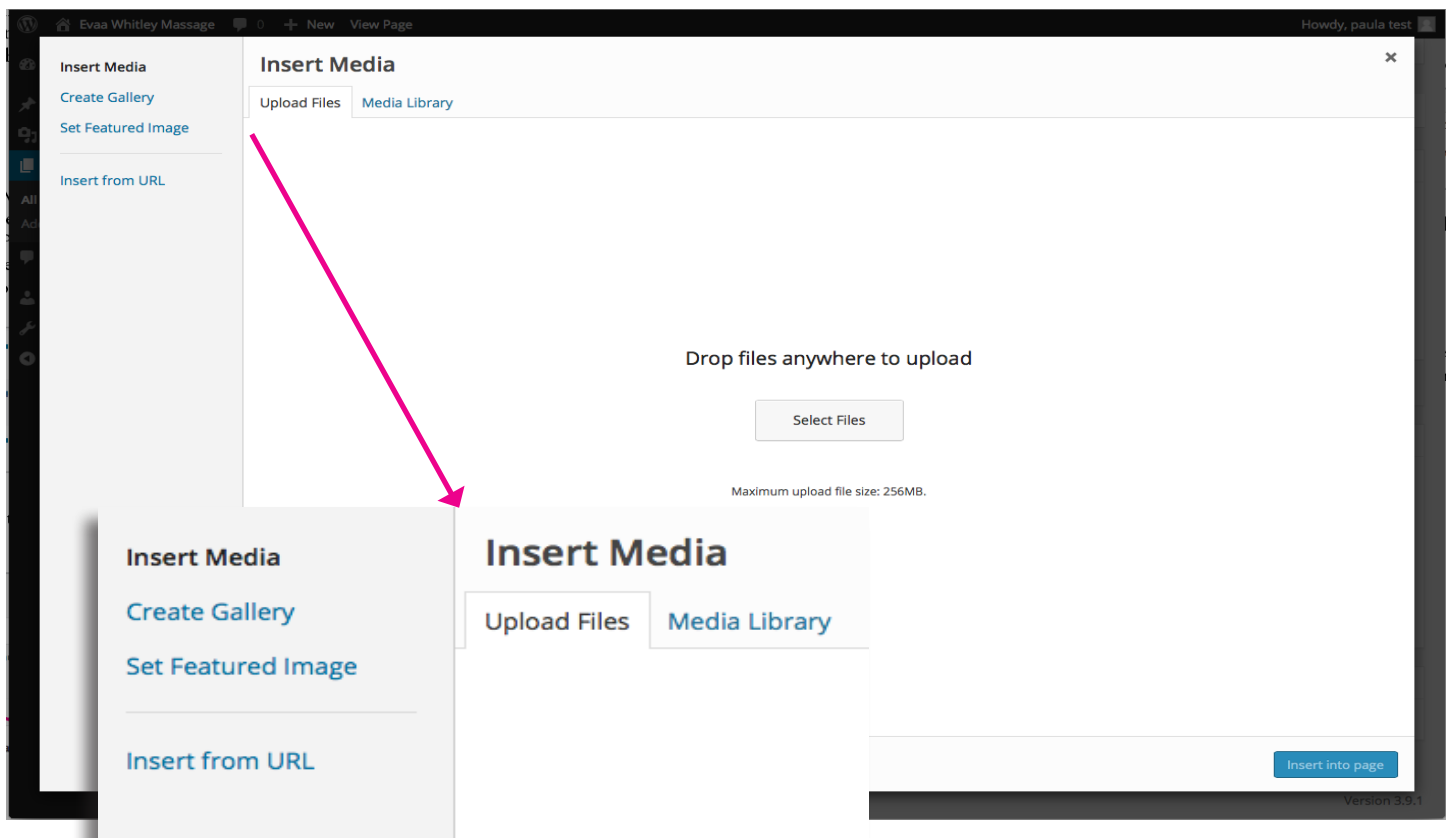
From this screen you can choose to Upload Files (default), pull files that you've already uploaded from your Media Library (the second tab--click on it), create a gallery of photos, set a featured image for a page or post, or insert a url to a photo hosted on someone else's site.

You can easily upload files by clicking the "Select Files" button in the middle of the screen, or even dragging and dropping photos from your desktop. Files need to be the correct file format to work with Wordpress. Photo file formats that work are jpgs, pngs, gifs--basically, picture file types that work for the web.

Drop files to upload
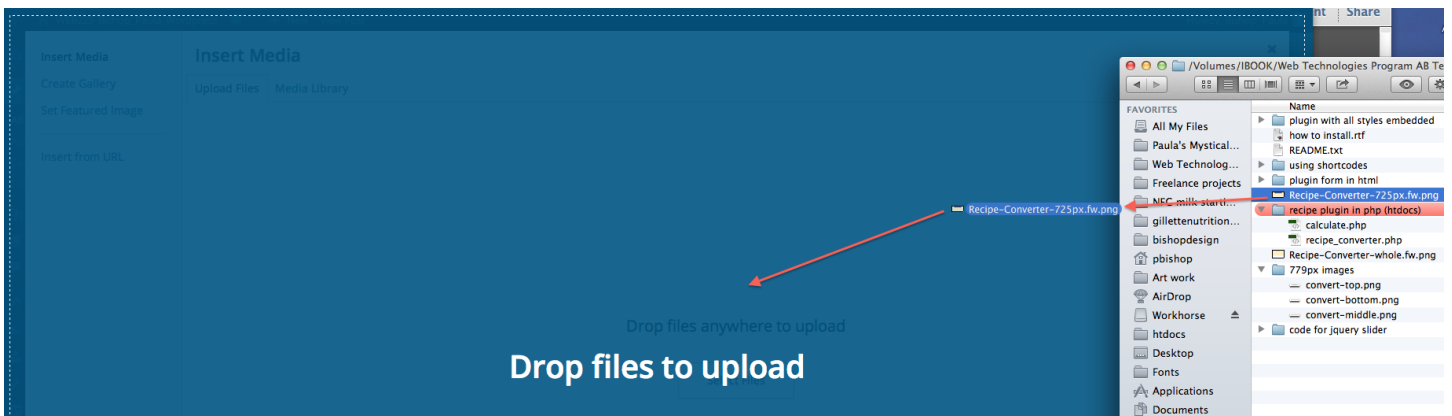
When you "drag and drop" from a file from your computer, the whole screen turns blue to signal it knows you're dragging a file, and when the little green "+" sign appears on your file, you can let go and it will upload it.

You are not restricted to photos, however (at least, not according to Wordpress Codex[2], which is the authority). Depending on your host (some may have file size upload restrictions), you can also upload:

Documents
.pdf, .doc, .ppt, .odt, .xlsx (Acrobat pdfs, Word documents, Power point presentations, OpenDocument text files, and Microsoft Excel spreadsheets)
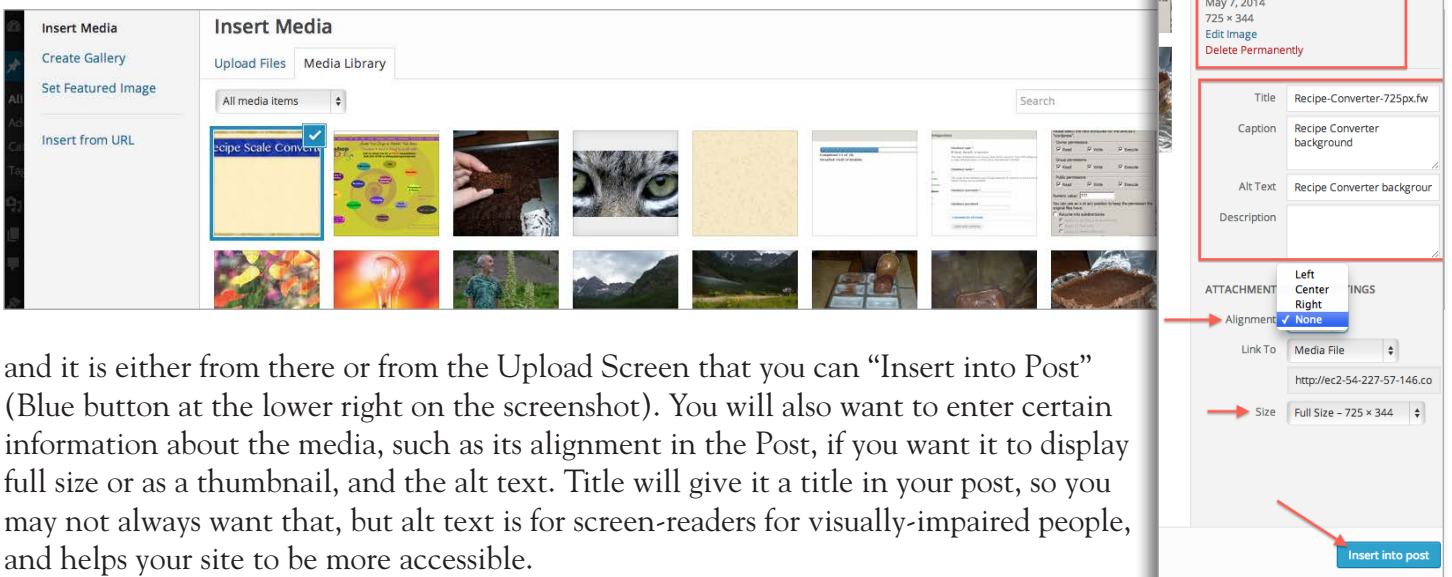
Audio
.mp3, .m4a, .ogg, .wav

Video
.mp4, .m4v (MPEG-4), .mov (QuickTime), .wmv (Windows Media), .avi, .mpg, .ogv, .3gp, and .3p2

Media Library

Once you upload whatever file type, and it accepts it, it puts it into the Media Library,


and it is either from there or from the Upload Screen that you can "Insert into Post" (Blue button at the lower right on the screenshot). You will also want to enter certain information about the media, such as its alignment in the Post, if you want it to display full size or as a thumbnail, and the alt text. Title will give it a title in your post, so you may not always want that, but alt text is for screen-readers for visually-impaired people, and helps your site to be more accessible.

When you do insert your media into your Post or Page, it then shows up as--well, depending on the format--an image or a media player or spreadsheet. Here it shows up as an image. That is, in the Visual editor. In the Text tab (formerly the HTML tab), it will show up as a link, as it's actually stored in the Media Library.

Editing photos in Wordpress

An exciting feature of Wordpress 3.9 which was just released recently is that now people can edit their photos right in Wordpress, including sizing them down and cropping them.
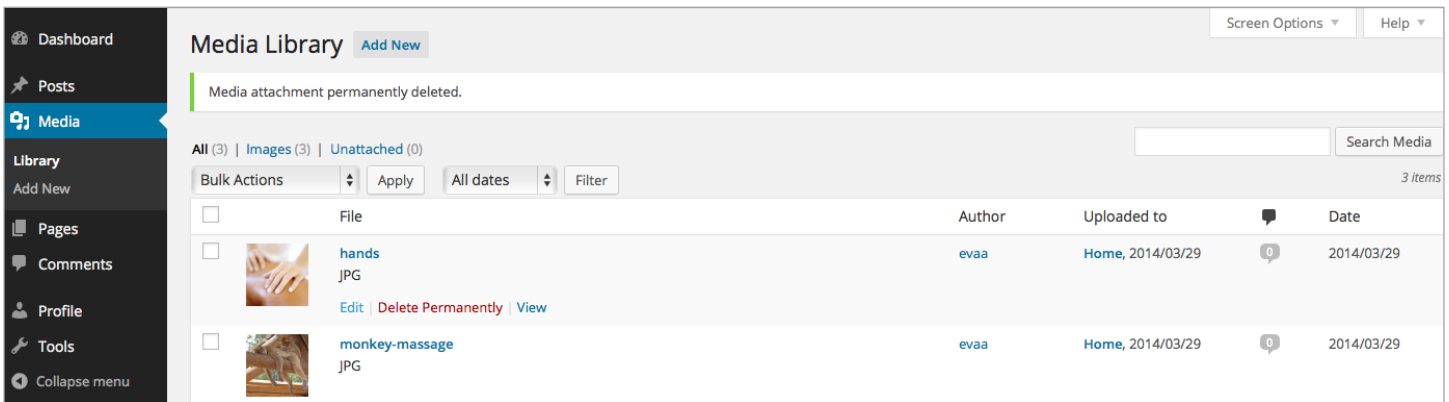
To edit an image, go to the Media Library, which will show you all of your media. When you mouse over a photo, it will show you the option to Edit | Delete Permanently | View. Of those, choose Edit.
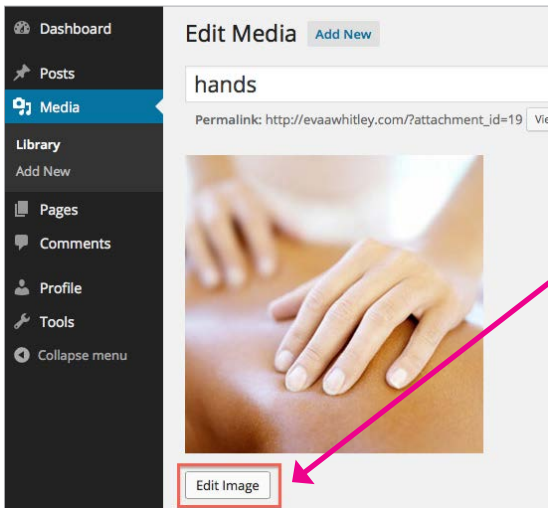

From there it will take you to an window with just that photo, and you can choose "Edit Photo" underneath the preview.
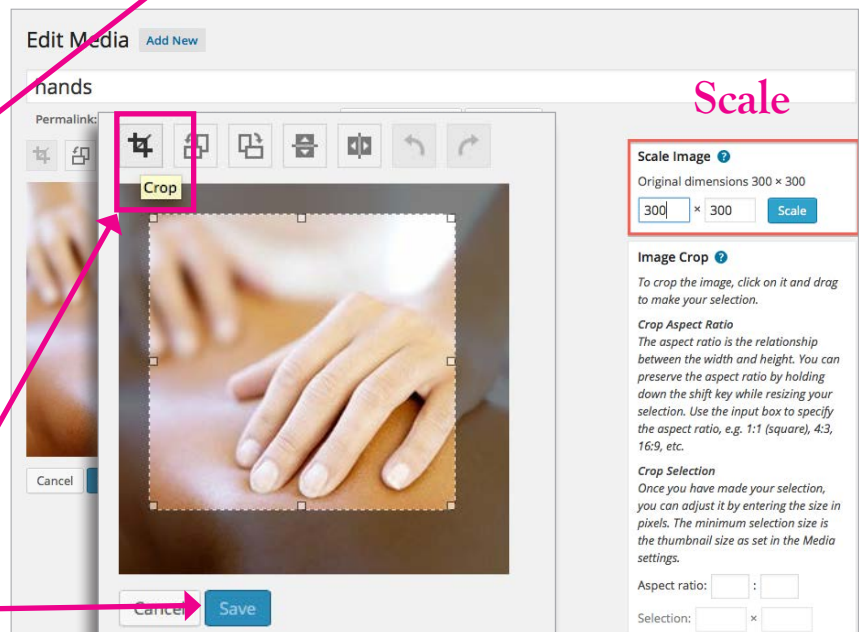
In Edit Photo mode, you can enter new numbers in the 'Scale' window, and you can also drag and drop with your mouse to crop. To crop, you need to confirm the crop by clicking the crop icon in the upper left. Be sure to remember to save!

Embedding video

While it is possible to directly upload video to Wordpress, it is a better idea to go to YouTube, create an account, upload your videos there, and then use the embed code under the share options to put the link on your site. That way, you have more SEO potential, and are not running into potential problems of running out of server space or complications with bandwidth transfer.
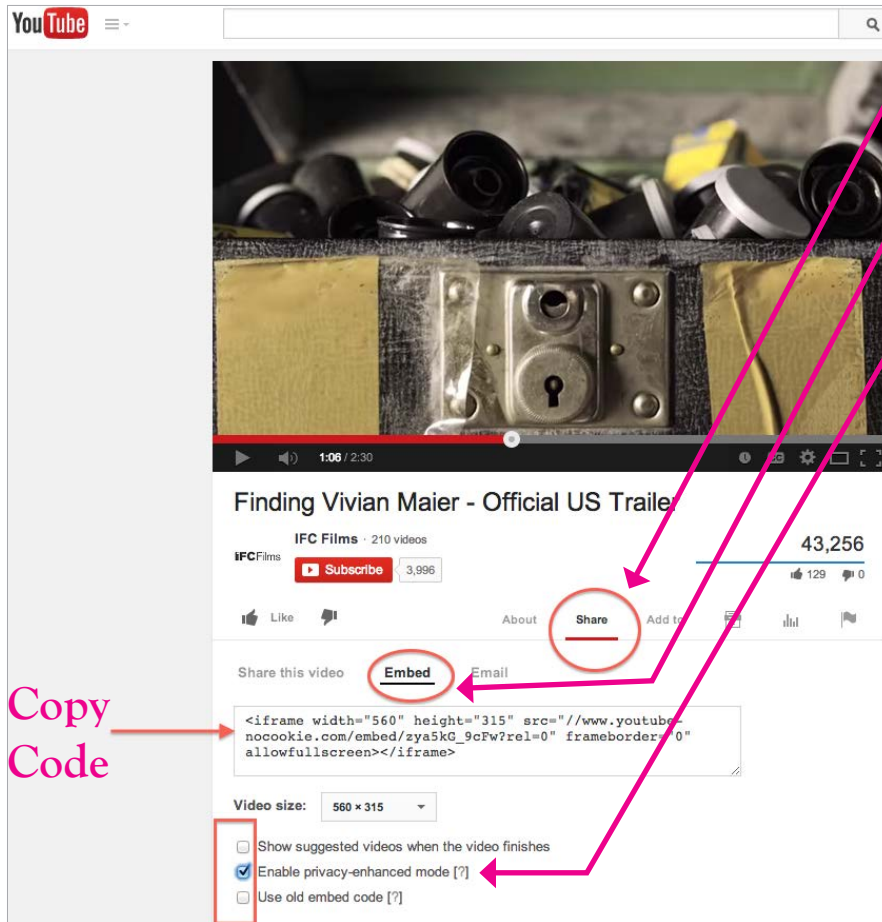
Copy Code

Go to your video, and click "Share."

Then, underneath that, choose "Embed."

I think it's also a good idea to enable "Privacy Enhanced Mode."

Then, finally, copy the code that results and scoot back over to your Wordpress site.

Back in the Editor, in your site, you will need to switch to the "Text" tab, but don't worry, you already have the code on your clipboard.

Paste that code into the Post or Page, and then hit "Publish" (right hand side, to the right of the editor) to see the results. Actually, to see the results, you will need to visit your site, or view the post, which you can do from a link right above the title.
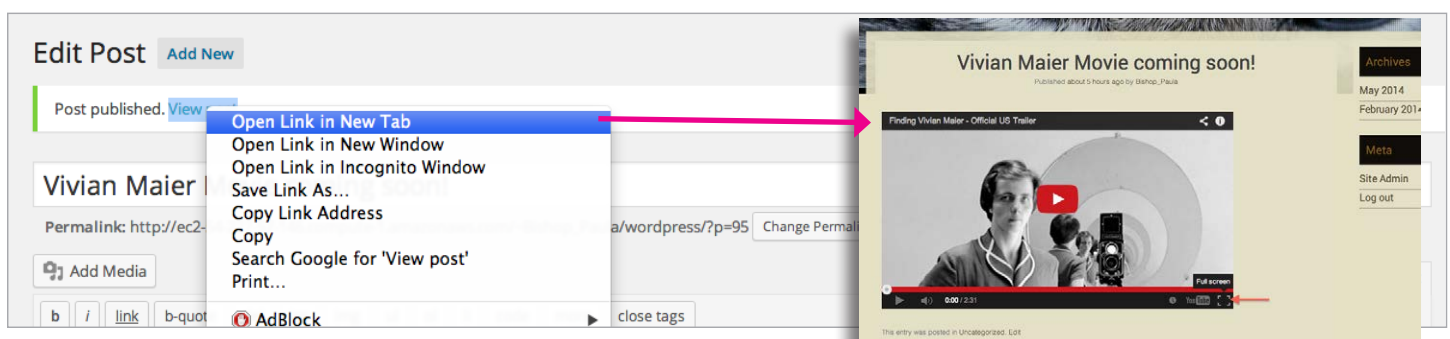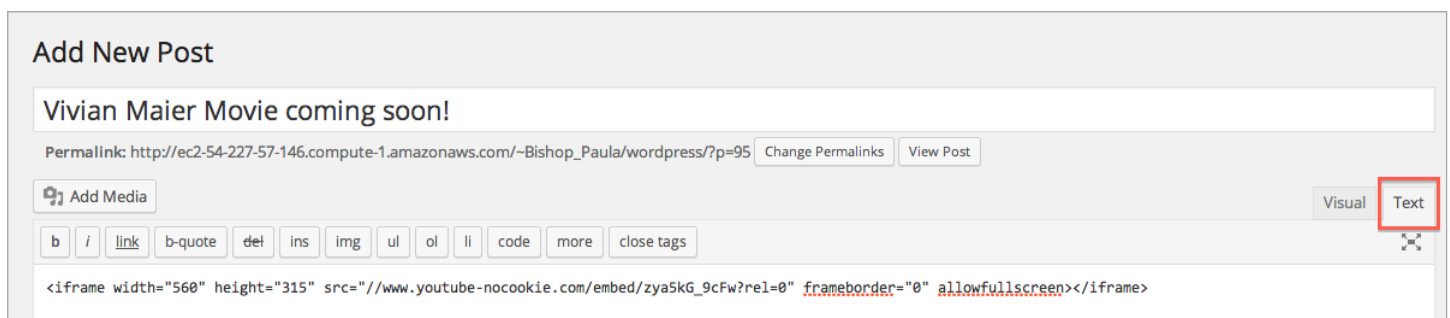
Publishing Posts & Pages

Once you have each Page and Post ready to go, complete with beautiful copy, pictures, images, files, whatever, it's time to Publish (as we went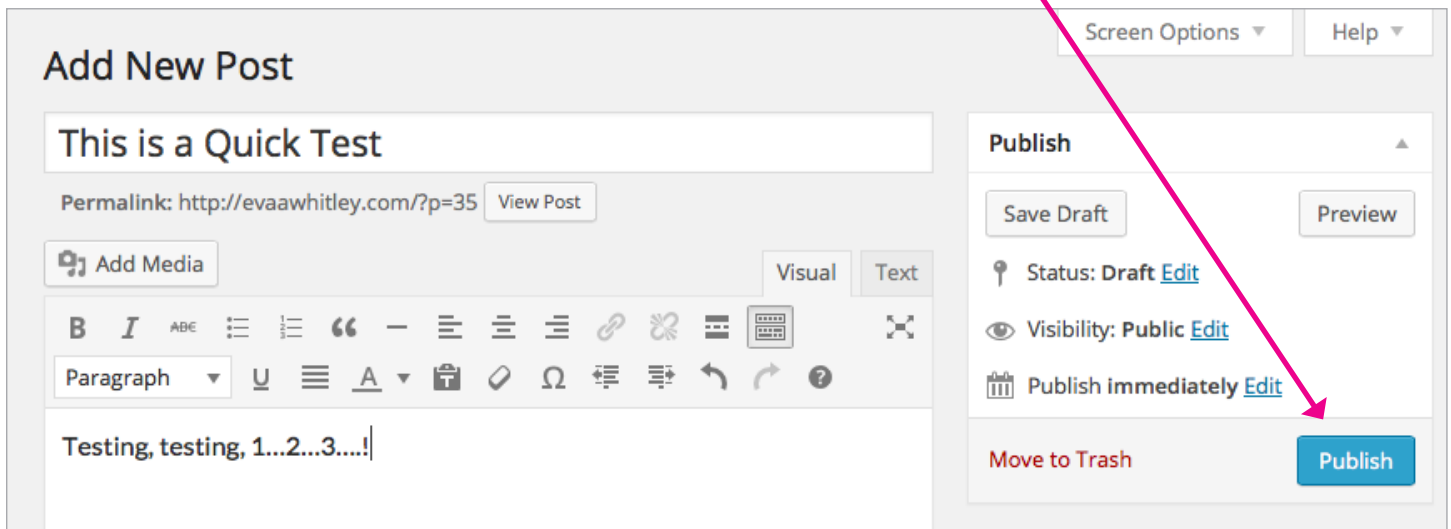 over with embedding videos) it to the web so that the public can enjoy the fruits of your labor! Don't worry, you can ALWAYS edit it later, and the Publish Button becomes "Update."

Moderating Comments

These days, there is a lot of SPAM, and even robo-spammers that go out and post fake comments wherever they can get in. If you prefer, you can have your Admin disable Comments altogether (after all, if you have a website and not just a blog, you may not want anyone to comment on any post or page), either across the whole site, or on a Page by Page or Post by Post basis.

If your site is set up for Comments, however, hopefully held for Moderation, then you will need to check occasionally and delete or approve them--usually Wordpress will let you know via email when there is a comment awaiting Moderation.

To delete spam comments, select their checkboxes, and under Bulk Actions choose "Delete Permanently" and then hit "Apply."
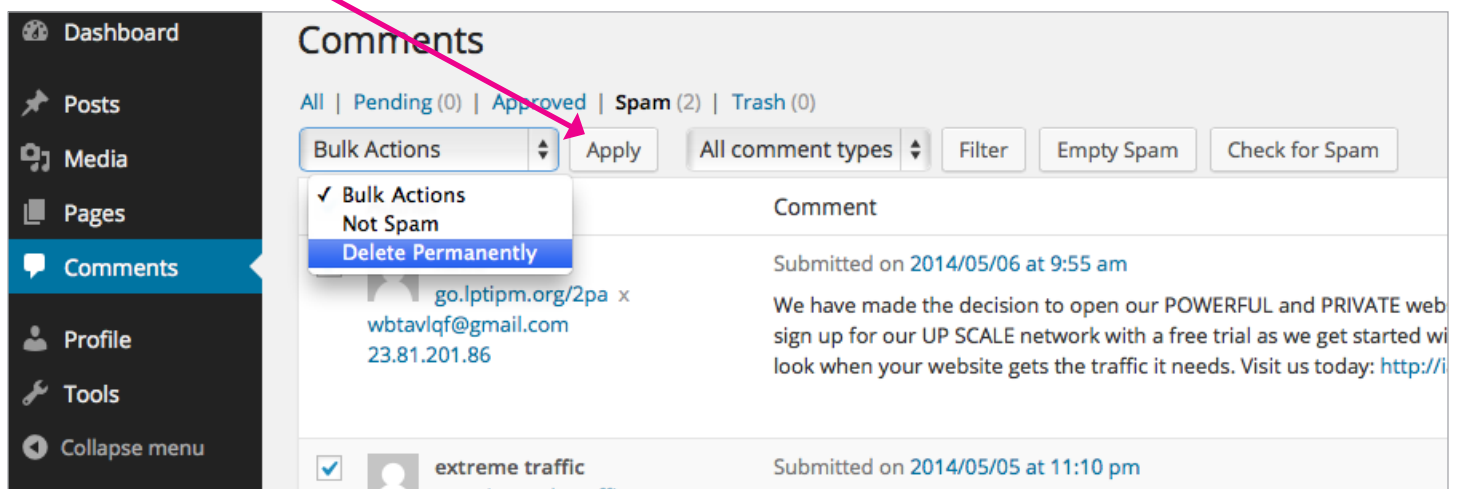
Conclusion

This manual covers a lot of the basics, so let me just recap what we covered:
1. How to log in
2. How to create and organize pages and posts, and add categorization
3. How to add, delete, and edit text content
4. How to add media such as pictures and links to videos on YouTube, as well as add other rich media
5. How to moderate comments

I hope that you've enjoyed this manual, and feel more confident managing content on your site. Thanks for reading, and have fun with your new site!

Glossary of Terms

CMS: Abbreviation of Content Management System. A Content Management System is a user-friendly framework to build and maintain websites, with functionality to assist users in adding, deleting, and otherwise managing content. Wordpress is a Content Management System.

Database: Information storage system. Wordpress uses a MySQL database to store all of its information, therefore export files are in SQL format.

Media Library: Stores all image, document, video, and sound files in Wordpress. These cannot be exported with the SQL file that contains all the other information from Wordpress, so when migrating a site, the media library can be exported with the help of plugins.

Plugin: Small program that adds functionality to Wordpress. The Editor side does not have access to plugins, but the Administrator does. Plugins are more for building or migrating the site, though there are plugins for adding calendars, geolocation dynamic maps, shopping carts, SEO, and much more. Plugins are part of what makes Wordpress so powerful.

SEO: Search Engine Optimization. This refers mainly to the Google algorithm of searching that has certain rules to make some sites rank higher in search results, making them more accessible. The algorithm is shrouded in mystery and is constantly changing, making SEO a moving target.

SQL: Database language which stands for "Structured Query Language."

Taxonomy: Categorization structure using tags. With Wordpress, posts are quickly accessed by tags through searches. Tags are similar to keywords, and should be relevant to content. Each post can have multiple categories and tags, but generally posts will have more tags than categories associated with them.

Widget: Small plugins that are miniature programs that add modular functionality, such as adding a blurb of text in the footer, or creating a small menu of links.

Frequently Asked Questions

Q: *I can't seem to insert a link--I have an image that when people click on it, I want it to go to my vendor site in another window. How do I do that?*

A: Make sure that the text or graphic you want to link is selected. Click on it once (not twice) if it's an image, or click and drag and release if it is text, and then, in the Visual Editor, in the menu, you will see a chain icon. With your link selected, click that chain icon, and a dialog box will pop up asking for the specific url, which can be off-site (such as your vendor site), or elsewhere in your site (look below for a drop down menu to choose which page or post), as well as give you the option to open the link in a new tab or window.
A video that helps describe this step-by-step is at https://www.youtube.com/watch?v=REat5AeDAkQ.[3]

Q: *I think all the comments I get are spam! Aren't there spam-blockers out there to screen those out? Can I just turn comments off?*

A: Akismet is the standard spam-blocking plugin that comes with every Wordpress installation, but is not activated until one purchases a yearly license to pay for the service, so if you are willing to pay $5 a month, you can block a majority of the spam. You can read more about Akismet's services at http://akismet.com/plans/. Alternatively, you can turn comments off on posts yourself, from the Dashboard, by going to Settings > Discussion > Default Article Settings, and uncheck the "Allow people to post comments on new articles" option.

Q: *I want my website to really be seen! How can I improve the SEO on my site so that it will pop up on the first page of searches?*

A: There are several SEO plugins out there that will assist in setting meta-tags for keywords, as well as evaluate them, such as the free SEO plugin by Yoast. However, the best way to raise SEO is to continually update your website, particularly with new posts. Google's spiders crawl the web ranking pages by how recently they have been updated, considering the most recent to be the most relevant. Also make sure that what you post is relevant to your site, and uses language that is specific to your industry. Google has spent a lot of money into artificial intelligence, partly to be able to evaluate websites more intelligently than they have in the past, and padding with keywords nowadays can actually penalize, not elevate your site's SEO.

Q: *When I'm uploading images, do I need to fill out all that stuff? What is the "Alt Text" for, anyway?*

A: You don't have to fill it all in, but the Alt Text is actually important for accessibility. Blind people with screen readers, who cannot see your photos, depend on the Alt Text description for the screen reader to tell them about the image. Only fill out the "Caption" if you want a caption to show up in your page or post under the photo. "Title" often gets populated automatically by Wordpress with the filename of the image.

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All other graphics used (besides my logo) are screenshots taken of various sites I have designed.

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