WordPress Guide

Ready to work on a blog post or update content? This document contains a how-to guide and general information to help you get the most out of your new WordPress site. Look here first for answers on how to get started or perform a specific task.

About This Guide

This guide covers the most basic WordPress features in a simple manner. The table of contents on the next page is organized by task and will let you quickly find and jump to the information you need.

The guide is illustrated with screenshots of approximately what you will see during the process of administrating your WordPress site. Screenshots are annotated with pointers that give a quick visual overview of what important options are available and what they do, and the body text surrounding them will go more in-depth into what these options are.

WordPress Guide

WordPress Guide

1. Overview

WordPress, originally released in 2003 as a simple blogging platform, has evolved throughout the years into a versatile content management system (CMS). While you can still use WordPress to create a simple blog, now it also allows developers to create fully functional websites and mobile applications, and end users to edit their sites with ease.

WordPress is easy and flexible enough for just about any type of website, and that has been the driving factor behind why it has grown so much in popularity since its beginnings. According to a recent survey, WordPress powers 28% of all websites on the internet.

Due to its robust feature set, many of the top brands use WordPress to power their blogs and websites, including Time Magazine, Microsoft, Sony Music, Disney, AMC, The New York Times, CNN, eBay, Spotify, and more.

Your website is, of course, also powered by WordPress. The best way to experience WordPress is by diving in and giving it a try, so check out the next section for detailed information on how to use it, and follow along if you're ready to start blogging or editing!

2. How-To

The how-to section contains information on the basic functionality of WordPress to help you edit and create content for your website as quickly and easily as possible. This will act as a quick reference for understanding how to use the various features WordPress offers to keep your site and/or blog updated.

2.1 The Basics

WordPress enables website owners to update page content and operate a blog through a friendly interface, avoiding the need to learn web design or development skills. However, there are a few things you should know before you get started with editing.

2.1.1 Logging In

Before you can make any changes to your site, you will need to log in. The login area for your site can be found at **https://yourdomain.com/wp-admin**, replacing *yourdomain.com* with your actual domain name.

Don't know your username and password? You should have received an email with your username (typically your email address) and a link to log in and set your password. If you do not have this email, use the "Lost your password?" link below the login form to recover your account.


Use this link to recover your account.
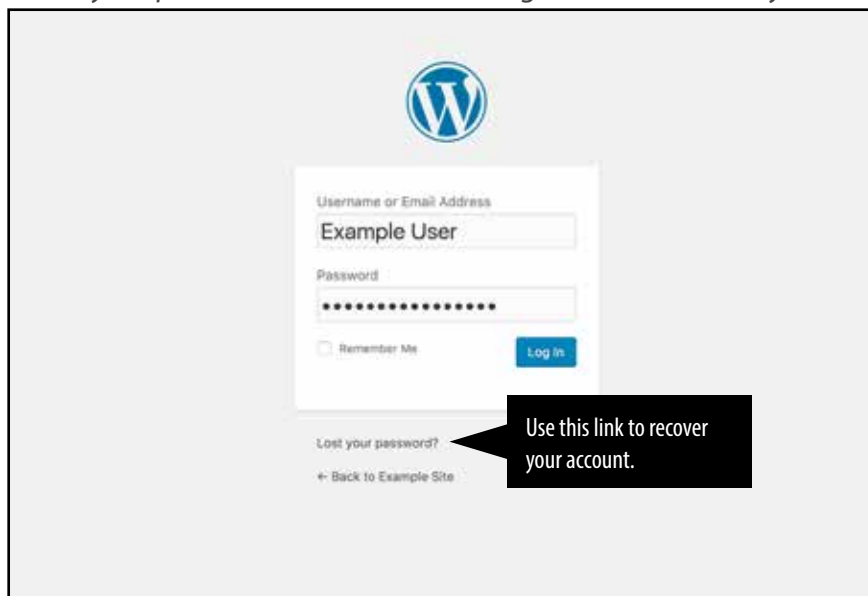
2.1.2   The Dashboard and Toolbar

Once you've logged in, the **WordPress Dashboard** appears. This is your main administration homepage. At the very top of your Dashboard (and across every page) you will see the name of your site in the header area. This is also linked to your site's homepage. You will also see the name of the person who is currently logged in. Move your cursor over your name to reveal the **Log Out** link as well as a link to edit your profile.
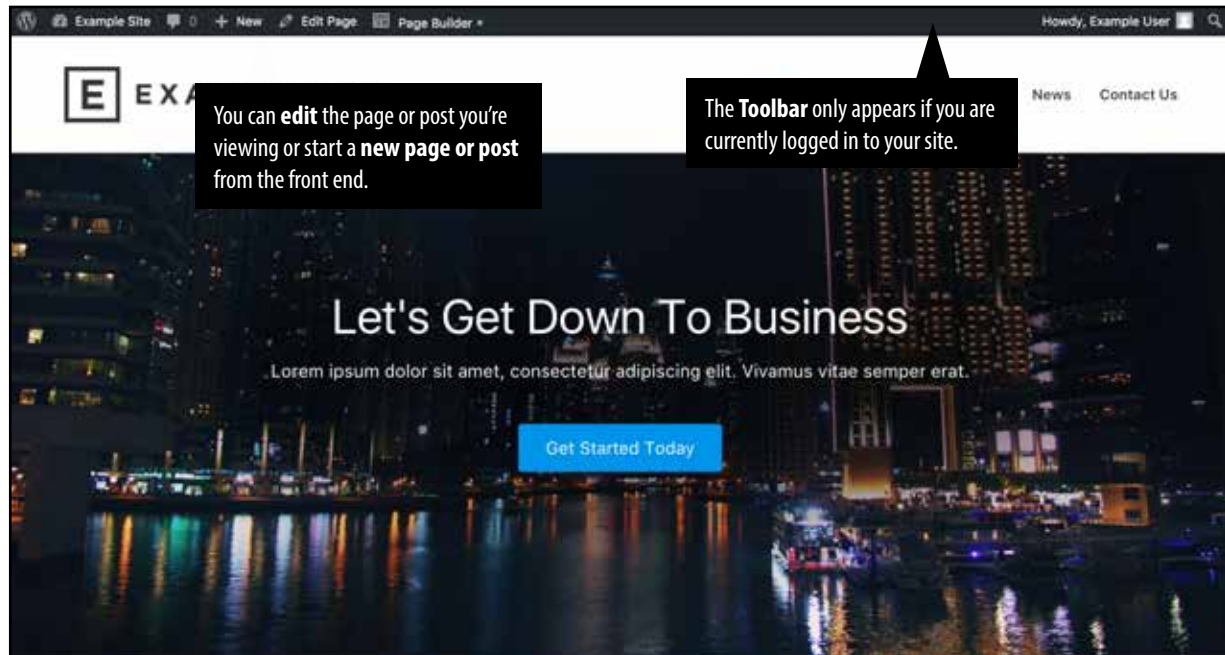
This is the **name** of your site.
It also links to your homepage.

The **Toolbar** provides quick access to some tools on both the back end and front end of your site.

Hovering your cursor over a menu option will display more options in a **submenu**.
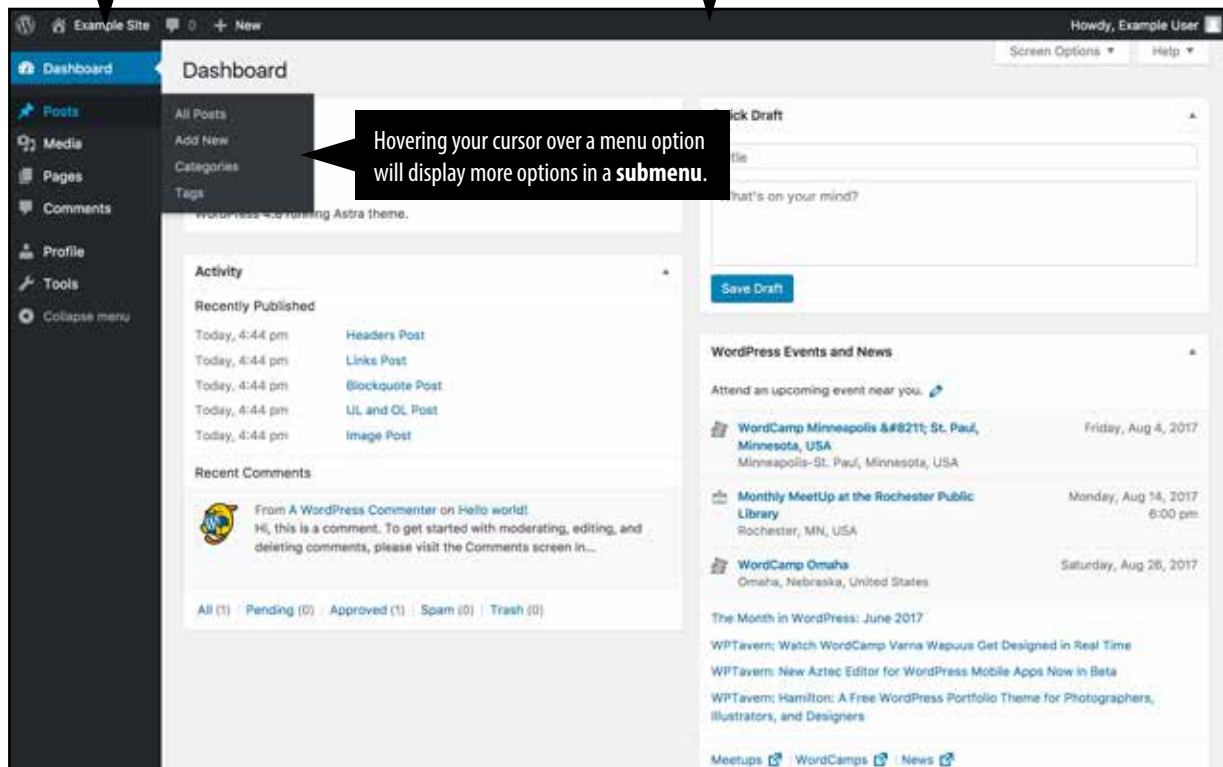
The **WordPress Toolbar** is a way of easily accessing some of the most common WordPress features. When you are logged into your WordPress Dashboard and you visit your website, you will see the Toolbar running across the top of your site. This bar only appears if you are currently logged into your WordPress site, which means that it won't be visible to your site visitors. If you are not logged in, the Toolbar won't be displayed.


You can **edit** the page or post you're viewing or start a **new page or post** from the front end.

The **Toolbar** only appears if you are currently logged in to your site.

2.2 Adding and Updating Content

WordPress is built around the concept of posts and pages. **Posts** are typically blog entries, or news (usually) listed most recent first. **Pages** are used for more static content that changes infrequently or not at all, like an "About Us" page. In most cases, you'll find that the content of the "About Us" page doesn't change very often.

2.2.1 The Post or Page List

After clicking on the Posts or Pages menu options, you'll be shown a list of posts or pages that your site contains. Among the information displayed is the title, author, and in the case of posts, categories, tags, and number of comments.
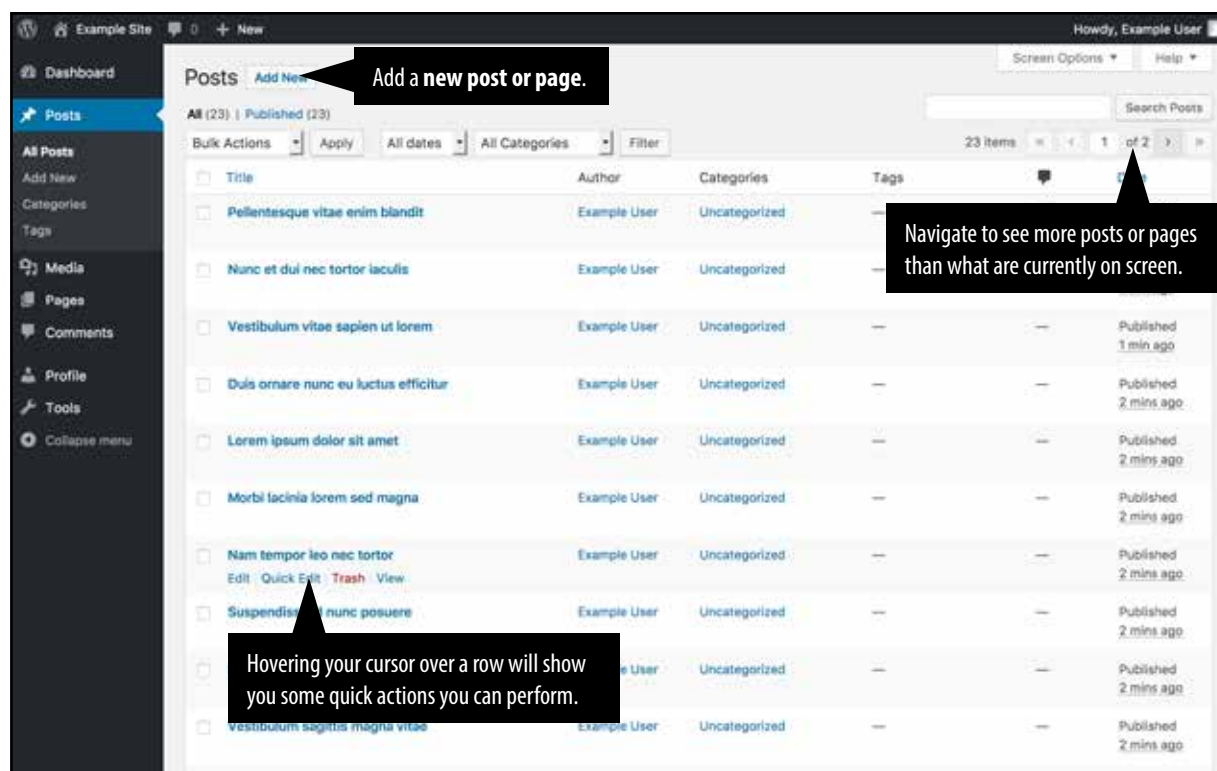
When hovering your cursor over each row, a few links will appear beneath the post/page title.

Edit – Will allow you to edit your post/page. This is the same as clicking on the title.
Quick Edit – Allows you to edit basic information such as title, slug/URL, and date.
Trash – Will send the post/page to the trash. Once the trash is emptied, the page is deleted.
View – Displays the post/page. If it hasn't been published yet, this will say **Preview**.
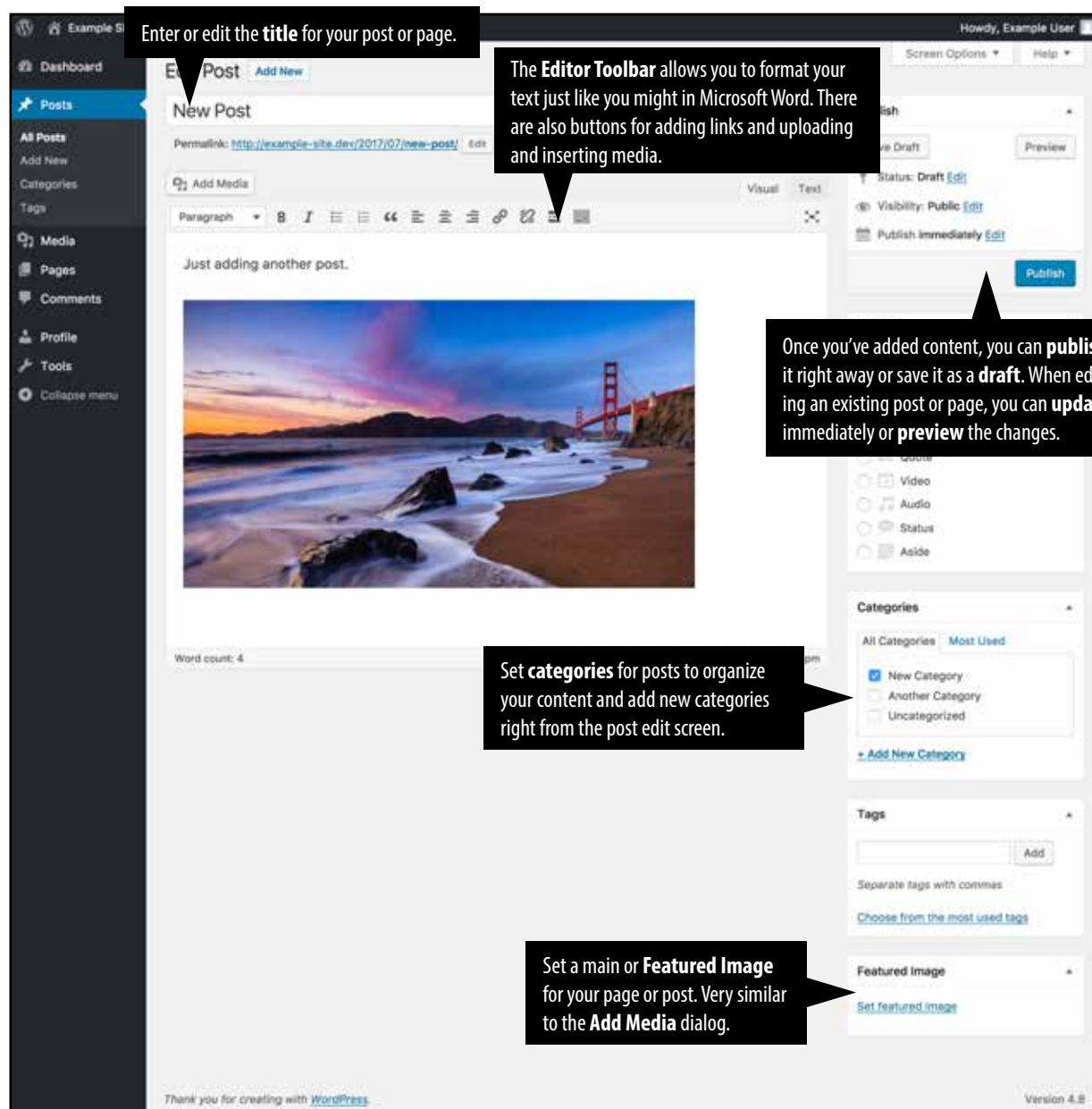
2.2.2 Editing Posts and Pages

To add a new post/page, hover your cursor over the Posts or Pages menu option in the left-hand navigation menu and click the **Add New** link from the fly-out menu. Alternatively, you can click the **Add New** button at the top of the post/page listing screen, or use the **+ New** menu option in the Toolbar from anywhere on the site.

To edit an existing post/page, find it on the listing screen and click on its title, or use the **Edit Post** or **Edit Page** menu option on the Toolbar when viewing the post/page from the front end.

Enter or edit the **title** for your post or page.

The **Editor Toolbar** allows you to format your text just like you might in Microsoft Word. There are also buttons for adding links and uploading and inserting media.

Once you've added content, you can **publish** it right away or save it as a **draft**. When editing an existing post or page, you can **update** immediately or **preview** the changes.

Set **categories** for posts to organize your content and add new categories right from the post edit screen.

Set a main or **Featured Image** for your page or post. Very similar to the **Add Media** dialog.

2.2.3 Revisions

If you ever accidentally save some changes you don't want to a post or page, look for the **Revisions** option in the **Publish** area. From there, you'll be able to drag your editing timeline back to a previous revision and restore it.

See any of your revisions here.

Adjust the slider to go back to a previous revision.
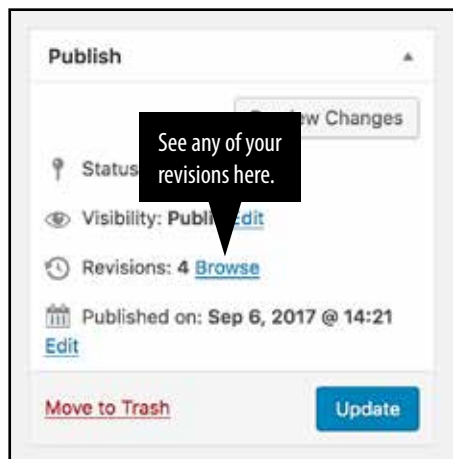
2.2.4 The WordPress Editor Toolbar

The editor used to enter content into your page or post is very straightforward. It's similar to using a regular word processor like Microsoft Word, with toolbar buttons that allow you to bold **B** or italicize *I* text, enter in headings Paragraph ▾, or insert bullet points ☰ ☰ .

When adding content to your page, the editor expands to fit your content instead of scrolling. No matter how tall the editor becomes, the toolbar buttons will be available at all times by sticking to the top of the page.

Here is a more detailed breakdown of what the toolbar buttons do (more on the next page):

Paragraph ▾	**Style** - Format the text as a heading, paragraph, or other special style.
B	**Bold** - Bold text.
I	**Italic** - Italicize text.

Last updated May 24, 2018 2:34 PM

Bulleted list - Create a bulleted list.

Numbered list - Create a numbered list.

Blockquote - Used as a way of showing a stylized quote.

Align left - Align text to the left.

Align center - Align text to the center of the content area.

Align right - Align text to the right.

Insert/edit link - Used to create a link with selected text (or without).

Remove link - Remove a link from selected text or images.

Insert Read More tag - Mainly for blog posts. Choose what text is shown before the link to read the rest of the post.

Toolbar Toggle - Show or hide the second row of the editor toolbar.

Strikethrough - Add a strikethrough line to your text.

Horizontal line - Insert a horizontal dividing line in your text.

Text color - Change the color of your text. Use sparingly if at all.

Paste as text - Strips special formatting that word processors or other sources might leave in when you copy and paste text from another place. Acts as a toggle, staying on until you turn it off again or save.

Clear formatting - Remove all formatting (bold, italic, etc.) from highlighted text.

Special character - Insert text chatacters not readily available from the kayboard (¼, ©, €, etc.).

Decrease indent - Removes one level of indenting.

Increase Indent - Indents text by one level.

Undo - Undo your last action.

Redo - Redo your last action.

Keyboard shortcuts - Display information about the visual editor, as well as keyboard shortcuts for common functions.

Distraction-free writing mode - Enlarge the editor so that it fills the browser window. Clicking the "Exit fullscreen" link at the top of the screen will reduce it back to its original size.

2.3   Working with Media/Images

Adding images and other media files such as videos, Word documents, or PDFs is extremely easy within WordPress. All your images and files are stored in the **Media Library**. Once they're uploaded into the Media Library, it's a simple process to insert them into your page or post content. In the case of files such as Word documents or PDFs, WordPress makes it easy to create links to those files so that people can download them.

2.3.1   Uploading Media

To insert an image into your post/page, click the **Add Media** button and then simply drag your images from wherever they are on your computer, into the browser window. Your files will be automatically uploaded. Alternatively, click the **Select Files** button and then select the files that you'd like to upload using the dialog window that is displayed.

The **Add Media** button opens a window to insert images and other files into the editor area.
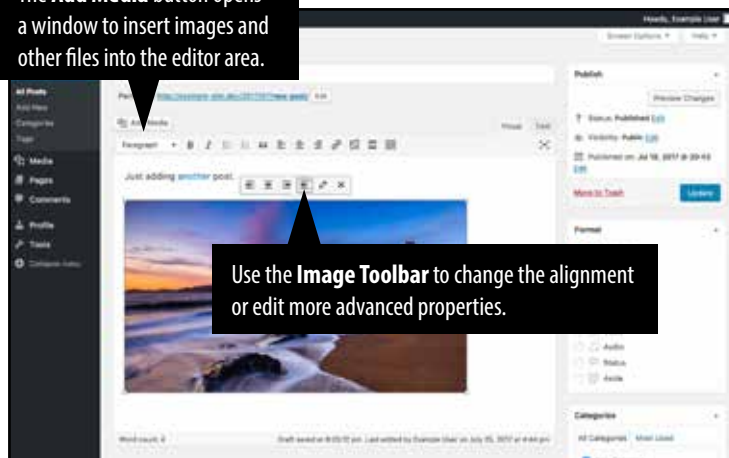
Use the **Image Toolbar** to change the alignment or edit more advanced properties.

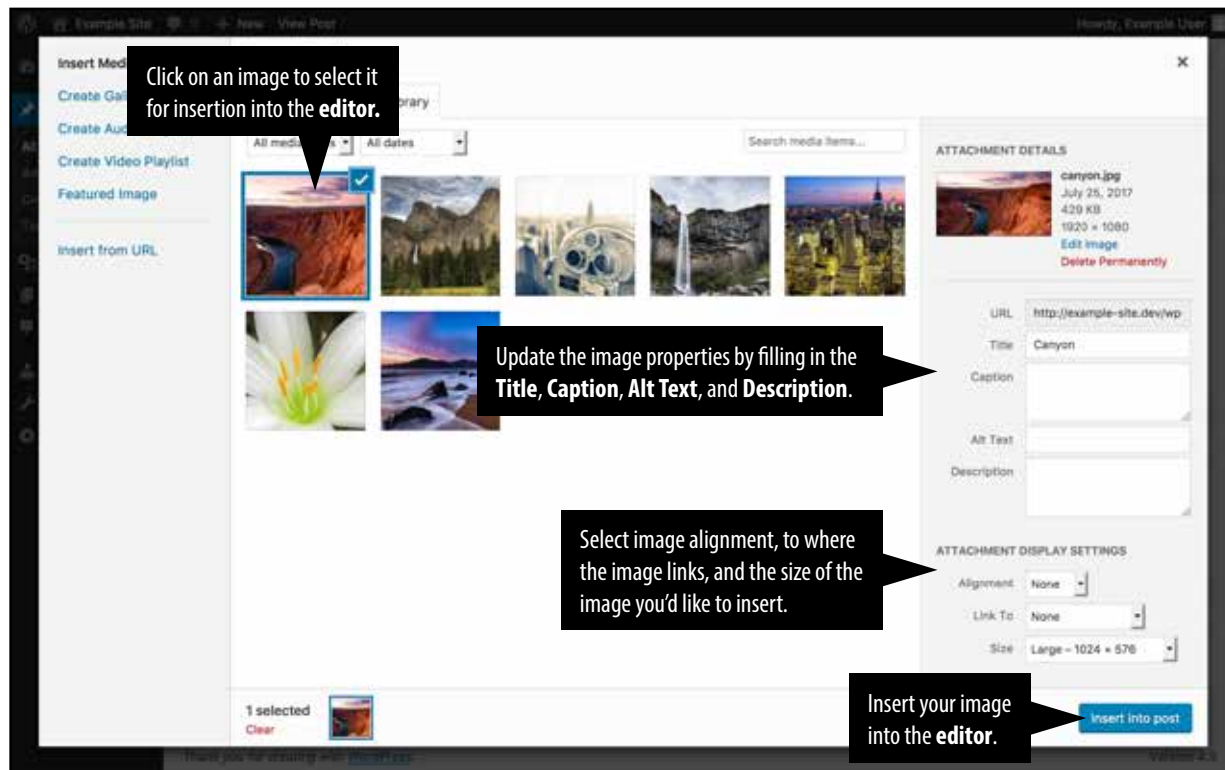Drag and drop files from your computer to this window to upload them.

Upload a new file or find an existing file in your **Media Library** by navigating between the tabs.
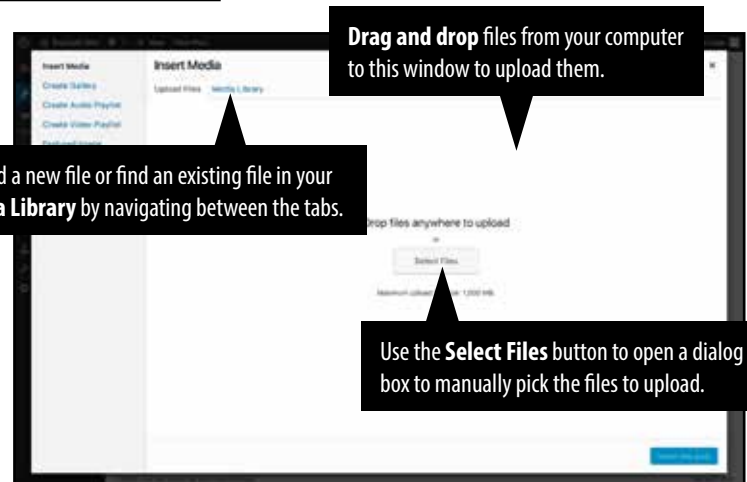
Use the **Select Files** button to open a dialog box to manually pick the files to upload.

2.3.2 Inserting Media

Once your image is uploaded, your Media Library is displayed and your files can be inserted. You can drag-and-drop files directly into this window to upload as well.

Click on an image to select it for insertion into the **editor.**

Update the image properties by filling in the **Title**, **Caption**, **Alt Text**, and **Description**.

Select image alignment, to where the image links, and the size of the image you'd like to insert.

Insert your image into the **editor**.

2.4 Working with Links

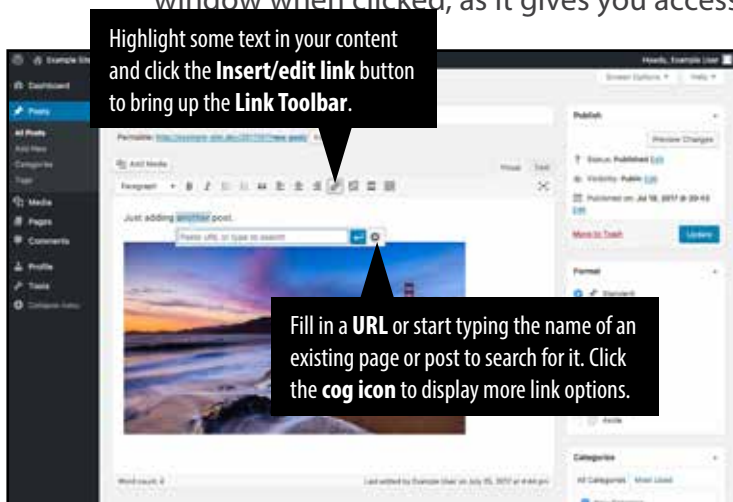Links in your content allow your site visitors to easily navigate around your site. They're also used when you want to allow people to download files from your site, like PDFs or other documents, for viewing images, or even just linking to other websites. WordPress makes linking to both internal and external pages a simple process.

2.4.1 Inserting Links

To insert a link, just highlight the text or click the image that you want linked and then click the **Insert/edit link** 🔗 button. A small inline link toolbar will pop in with a place to enter your link URL. You can also insert a link to one of your existing posts or pages by typing the name of the post/page and then selecting it from the list that displays.

After you've entered your link URL, hit your *Enter* key or click the arrow button ↵ to apply the link.

If you'd like more options, click the **Link options button** ⚙ in the **Link Toolbar** to bring up a pop-up window. This window is also useful if you'd like to have your link open in a new tab/ window when clicked, as it gives you access to the **Open link in a new tab** checkbox.

Highlight some text in your content and click the **Insert/edit link** button to bring up the **Link Toolbar**.

Fill in a **URL** or start typing the name of an existing page or post to search for it. Click the **cog icon** to display more link options.

Edit the **URL** and the content of your highlighted **link text**.

If you'd like to insert a link to one of your existing pages or posts, select it from the list, or search for it to narrow things down.

2.4.2 Editing or Removing Links

To edit a link, click the link that you'd like to edit to display the **Link Toolbar** again. Once the toolbar appears, click the **Edit button** ✎ to display the edit field. Alternatively, click the link and then click the **Insert/edit link** 🔗 button on the main **Editor Toolbar**.
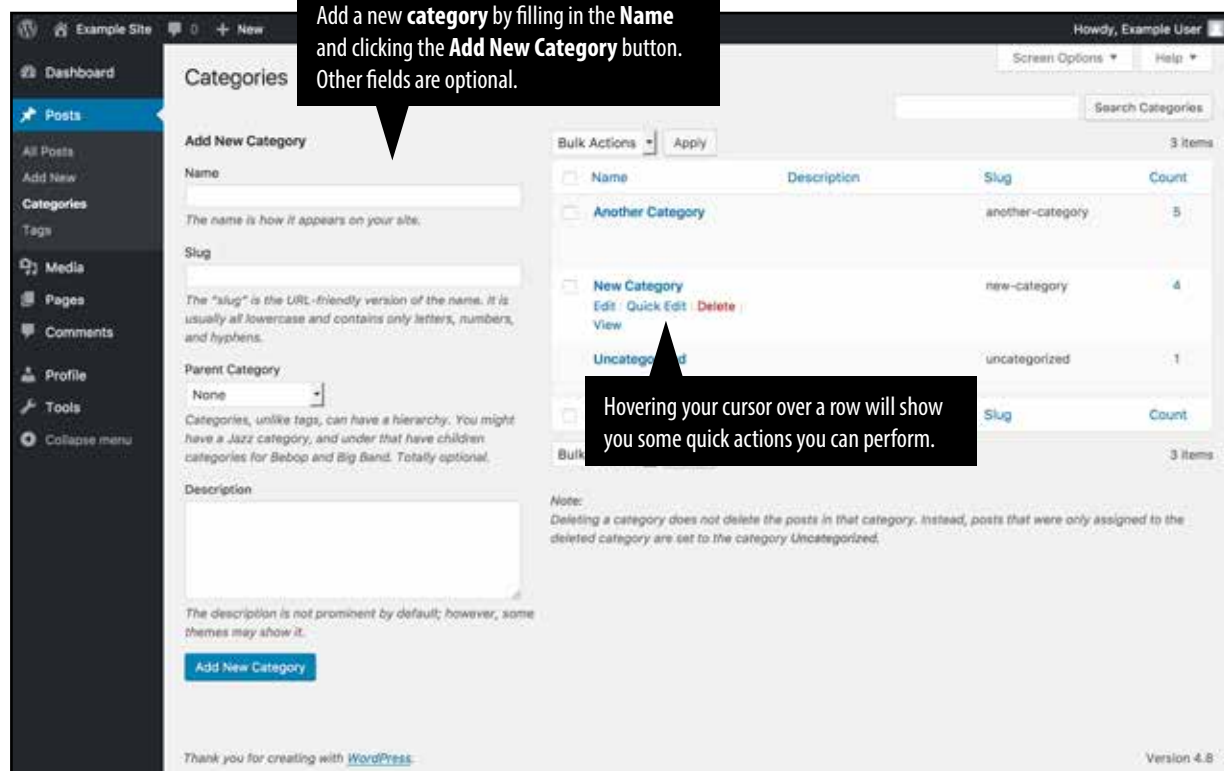
To edit an image link, click on the image and then click the **Insert/edit link** 🔗 button on the main **Editor Toolbar**.

After you've entered your link URL, hit your *Enter* key or click the arrow button ↵ to apply the link.

To remove a link, click the link you'd like to remove to display the **Link Toolbar**. Once the toolbar appears, click the **Remove button** to remove the link. Alternatively, click the link and then click the **Remove link button** on the main **Editor Toolbar**.
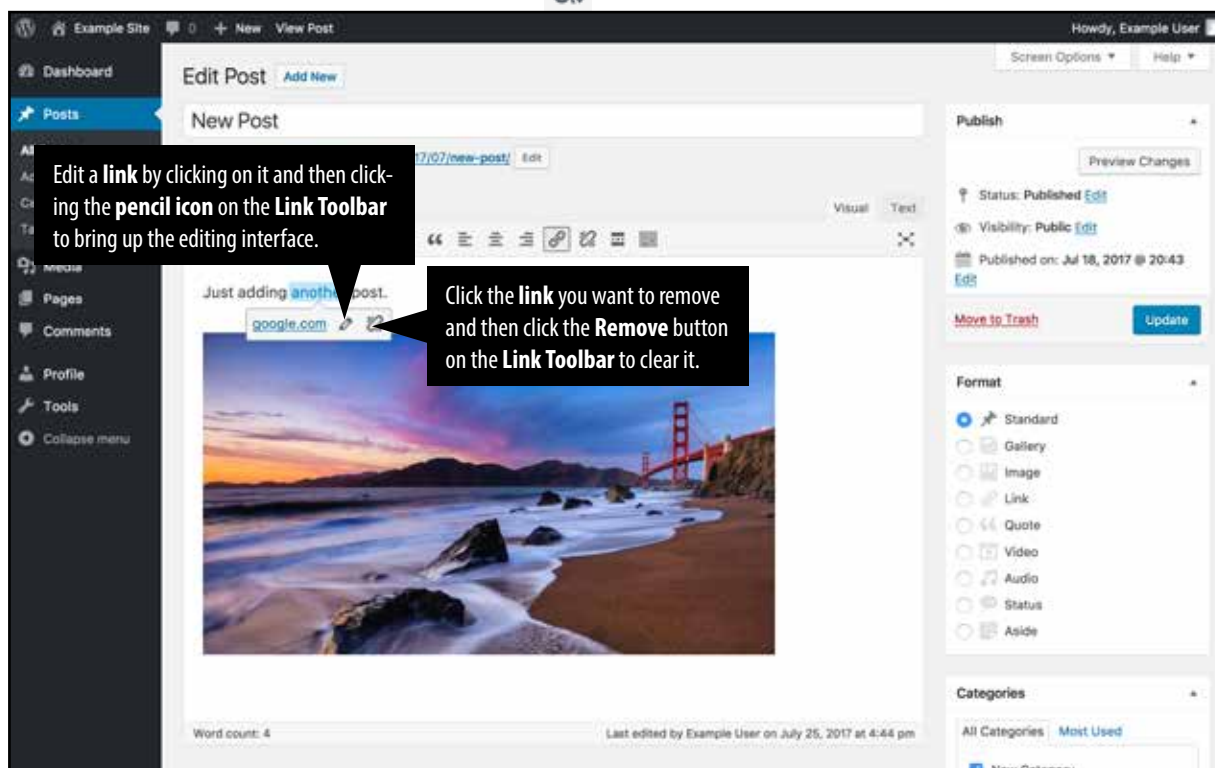
If you want to remove a link from an image (see **2.4.1** for adding links to an image), just click the image once to select it and then click the **Remove link button** on the main **Editor Toolbar**. If the link is linking to an uploaded file or image, clicking the button won't remove or delete that file; it will only remove the hyperlink.

Add a new **category** by filling in the **Name** and clicking the **Add New Category** button. Other fields are optional.

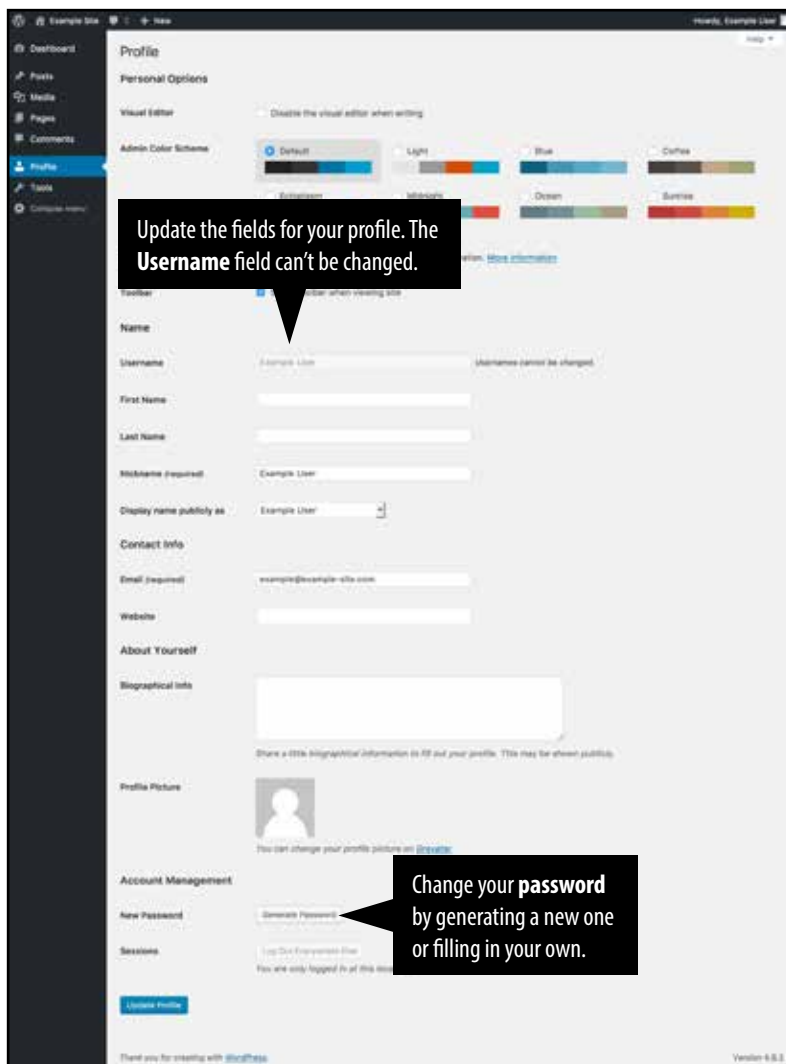Hovering your cursor over a row will show you some quick actions you can perform.

2.5 Categories

Categories are a great way to organize your blog posts or other content. For example, you might want to categorize posts related to tips in your industry separately from posts that are meant for potential clients to read, or maybe you want to organize posts by products you sell.

There are two ways to add categories. They can be added while adding or editing your post (which will also associate the category with your post), or they can be added via the **Categories** menu option under **Posts**.

When you click on the **Categories** menu option, you'll be shown a list of categories that have already been added, along with some blank fields that allow you to add a new category.

Update the fields for your profile. The **Username** field can't be changed.

Change your **password** by generating a new one or filling in your own.

To add a new category, fill in the form fields and then click the **Add New Category button**.

Name – How the category appears on your site.
Slug – How the category appears in URLs. Leave it blank to automatically generate it.
Parent – Decide if the category should be a sub-category of another.
Description – A brief summary of the category. Generally not used.

2.6 Editing Your Profile

To edit your profile details, just find the **Edit My Profile** menu option when hovering on your name in the upper-right corner of the **Toolbar**, or click on the **Profile** menu option in the left-hand navigation.

For the most part, these options can be left alone, but there may be some cases where you want to make changes to your profile. Here are some of the options you may be interested in changing:

Username – You cannot edit your username, because it is used for the login process. Usually, though, no one else ever needs to see your username.
First name – Add or edit your first name.
Last name – Add or edit your last name.
Nickname – (mandatory) The nickname is a requirement for every user. It may be the same as your username, or it can be different if you so choose.
Display name publicly as – Select how your name is shown on your blog (if it is shown at all) from the dropdown list. You can choose from several options: **Nickname**, **Username**, **First Name**, **Last Name**, **"First Last"**, or **"Last First"**.
Email – All users are required to list an email address in their profiles. The email address must be unique for each user. WordPress will use this address to notify you of new comments to your posts and for other administrative purposes. Your email address is is never shown publicly.
New Password – Click the **Generate Password** button to generate a new strong password. A password strength indicator will be shown just below the password field. If you choose to use a weak password, WordPress will ask you to confirm the security risk. It is not recommended to use a weak password.