



EASY **WP**GUIDE

WordPress Manual

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Easy WP Guide WordPress Manual

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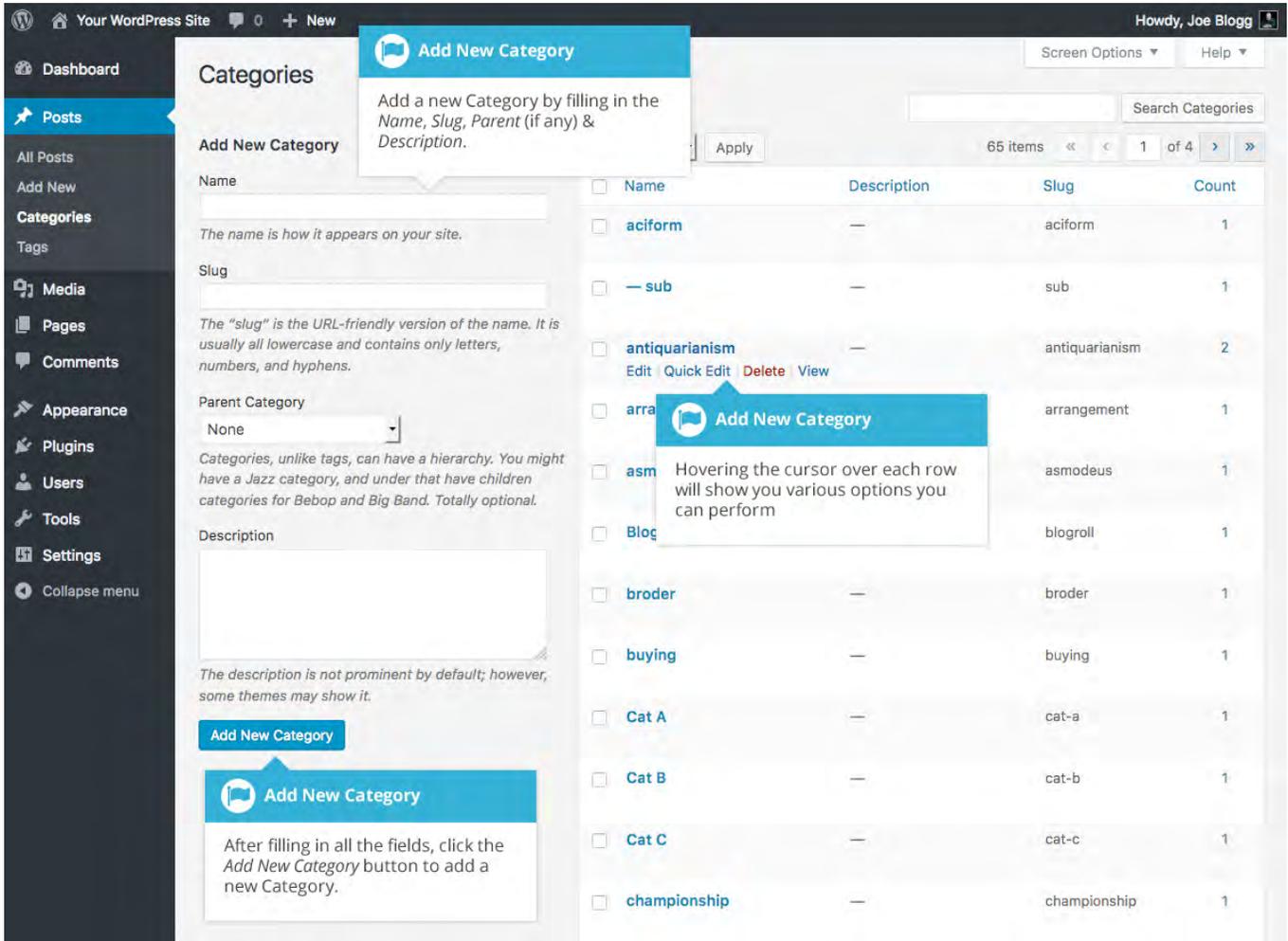
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Categories

You can use categories to define sections of your site and group related posts. The default category is *Uncategorized* but this can be easily changed in your Settings. Pages cannot be associated with Categories. You can only associate Categories to Posts.

There are two ways to add Categories. They can be added whilst adding or editing your Post or they can be added via the *Categories* menu option. Adding Categories whilst editing your Post, will automatically assign those Categories to your Post. Adding Categories using the *Categories* menu option will simply add them to the list of available Categories.

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.



To add a new Category, fill in the blank fields and then click the *Add New Category* button:

- **Name** – The name is how it appears on your site
- **Slug** – The Slug is the URL-friendly version of the name. It's usually all lowercase and contains only letters, numbers, and hyphens
- **Parent** – Categories, unlike tags, can have a hierarchy. You might have a Car category, and under that have children categories for Ford, General Motors and Toyota. Totally optional. To create a subcategory, just choose another category from the *Parent* dropdown
- **Description** – The description is not prominent by default; however, some themes may display it

Once you add a new Category it will appear in the list of Categories on the right side of the screen.

When hovering your cursor over each row in the list of Categories, a few links will appear beneath the Category name.

- **Edit** – Allows you to edit the Category properties such as Name, Slug, Parent and Description
- **Quick Edit** – Allows you to quickly edit the Category Name and Slug
- **Delete** – Deletes the Category permanently from the list of Categories. After clicking Delete you will be prompted to confirm your choice. Click *OK* to delete the Category or *Cancel* if you don't want to delete it
- **View** – This will list all the Posts that are currently using this Category

If you would like to permanently delete numerous Categories at once, click the checkboxes next to the Categories you would like to delete and then choose *Delete* from the *Bulk Actions* dropdown list at the top of the page. After selecting Delete, click the *Apply* button to immediately delete the selected Categories (you will not be prompted to confirm your choice).

Deleting a Category does not delete the posts in that Category. Instead, posts that were only assigned to the deleted Category are set to the default Category, which is set to *Uncategorized* by default. The Default Post Category can be configured within the *Settings > Writing* section.

Adding Categories within your Post

Adding Categories whilst editing your Post will automatically assign those Categories to your Post.

When adding or editing your Post, the *Categories* panel can be found just below the *Format* panel if your Theme supports Post Formats. Alternatively, it will reside just below the *Publish* panel. To add an existing Category, simply tick the checkbox(es) next to the Categories you'd like to assign to the Post.

The screenshot shows the WordPress post editor interface. On the left is a dark sidebar with navigation options like Dashboard, Posts, Media, and Settings. The main content area shows a post with a paragraph of text and a featured image. On the right, the 'Categories' sidebar is visible, showing a list of categories with checkboxes. Two callout boxes are overlaid on the interface: one pointing to the 'Add Existing Category' link and another pointing to the '+ Add New Category' link. The text in the callouts explains the steps for adding categories to a post.

Add Existing Category
To add an existing Category, tick the checkbox(es) next to the appropriate Categories to assign them to the Post.

Add New Category
To add a new Category, click the + *Add New Category* link and type in the Category name. Select the *Parent Category* from the list if appropriate. Click the *Add New Category* button to assign it to the Post.

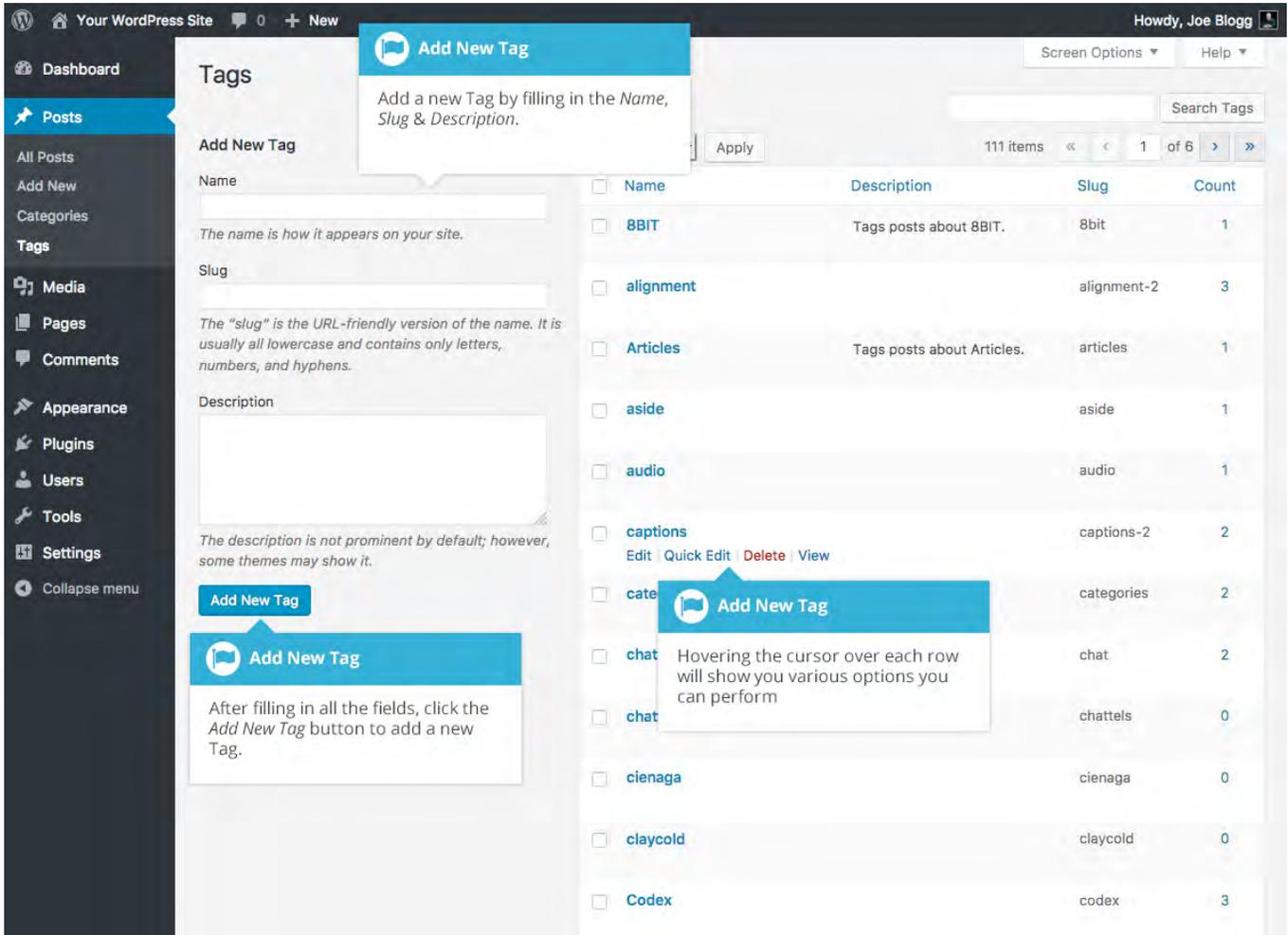
If you would like to create a new Category and assign it to the Post at the same time, click the + *Add New Category* link. Two fields will then appear. Type the name of the Category that you'd like to add into the empty input field. If you'd like the new Category to have a Parent, select it from the *Parent Category* dropdown list. Click the *Add New Category* button when done to create the Category and automatically assign it to the Post.

Tags

Tags are ad-hoc keywords that identify important information in your post (names, subjects, etc) that may or may not recur in other posts. Unlike Categories, Tags have no hierarchy, meaning there's no relationship from one Tag to another. Pages cannot be assigned Tags and cannot be associated with Categories. You can only associate Tags and Categories to Posts.

Like Categories, there are two ways to add Post Tags. They can be added whilst adding or editing your Post or they can be added via the *Tags* menu option. Adding Tags whilst editing your Post, will automatically assign those Tags to your Post. Adding Tags using the *Tags* menu option will simply add them to the list of available Tags.

When you click on the *Tags* menu option you'll be shown a list of Tags that have already been added, along with some blank fields that allow you to add a new Tag. A list of *Popular Tags* is also displayed in 'cloud' format. That is, the Tags are displayed in alphabetical order and the more often a Tag has been used, the larger the font it's displayed in.



To add a new Tag, fill in the blank fields and then click the *Add New Tag* button:

- **Name** – The name is how it appears on your site
- **Slug** – The Slug is the URL-friendly version of the name. It's usually all lowercase and contains only letters, numbers, and hyphens
- **Description** – The description is not prominent by default; however, some themes may display it

Once you add a new Tag it will appear in the list of Tags on the right side of the screen.

When hovering your cursor over each row in the list of Tags, a few links will appear beneath the Tag name.

- **Edit** –Allows you to edit the Tag properties such as Name, Slug and Description

- **Quick Edit** – Allows you to quickly edit the Tag Name and Slug
- **Delete** – Deletes the Tag permanently from the list of Tags. After clicking Delete you will be prompted to confirm your choice. Click *OK* to delete the Tag or *Cancel* if you don't want to delete it
- **View** – This will list all the Posts that are currently using this Tag

If you would like to permanently delete numerous Tags at once, click the checkboxes next to the Tags you would like to delete and then choose *Delete* from the *Bulk Actions* dropdown list at the top of the page. After selecting Delete, click the *Apply* button to immediately delete the selected Tags (you will not be prompted to confirm your choice).

Adding Tags within your Post

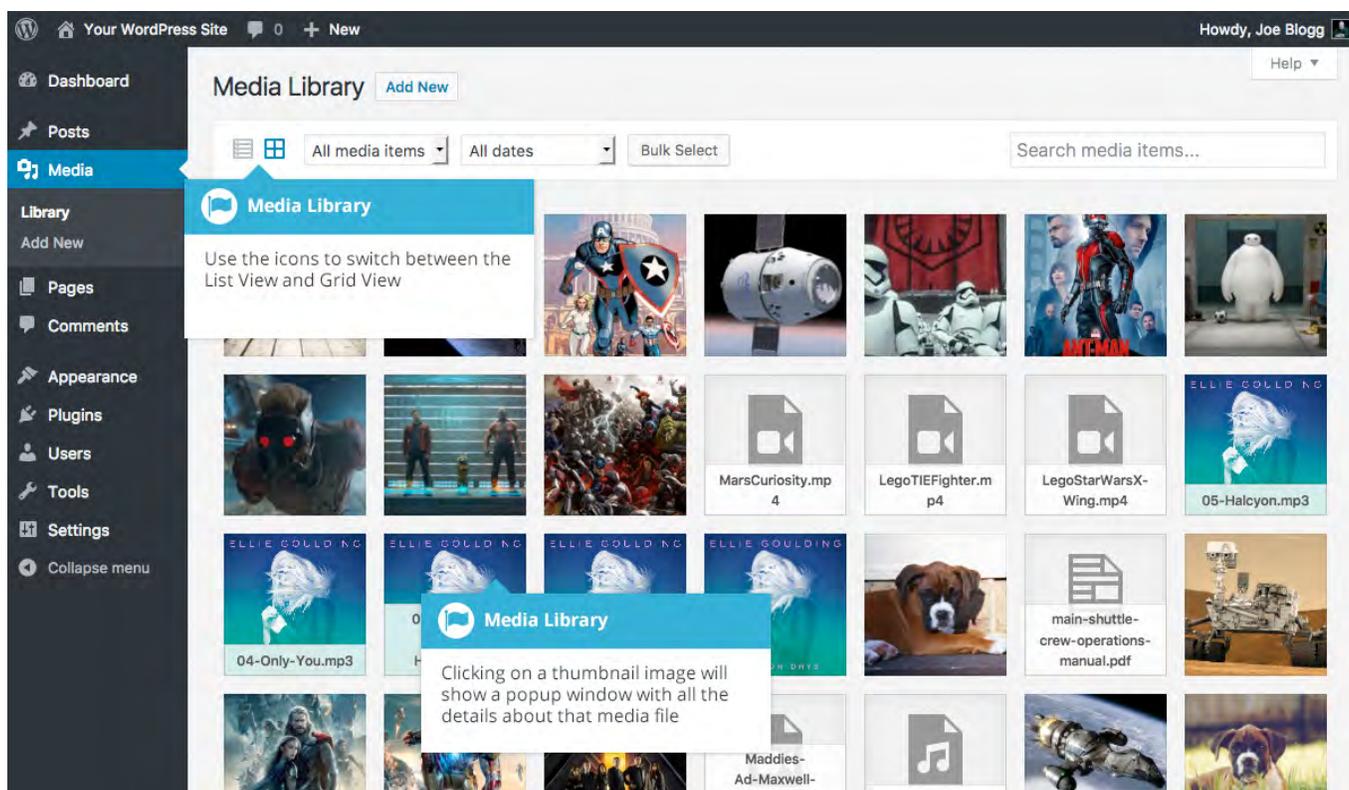
Adding Tags whilst editing your Post, will automatically assign those Tags to your Post.

When adding or editing your Post, the *Tags* panel can be found just below the *Categories* panel. To add an existing Tag, click the *Choose from the most used tags* link. This will display a list of previously used Tags (if available). They are arranged alphabetically and in 'cloud' format. That is, the more often a Tag has been used, the larger the font it's displayed in. To add a previously used Tag, simply click on the Tag name and it will be assigned to your Post. To add a new Tag, simply write the Tag or Tags (separated with commas) into the edit field and click the *Add* button. Tags that are assigned to the Post will be displayed below the edit field. To remove a Tag from your Post, click the small 'x' icon next to the Tag name.

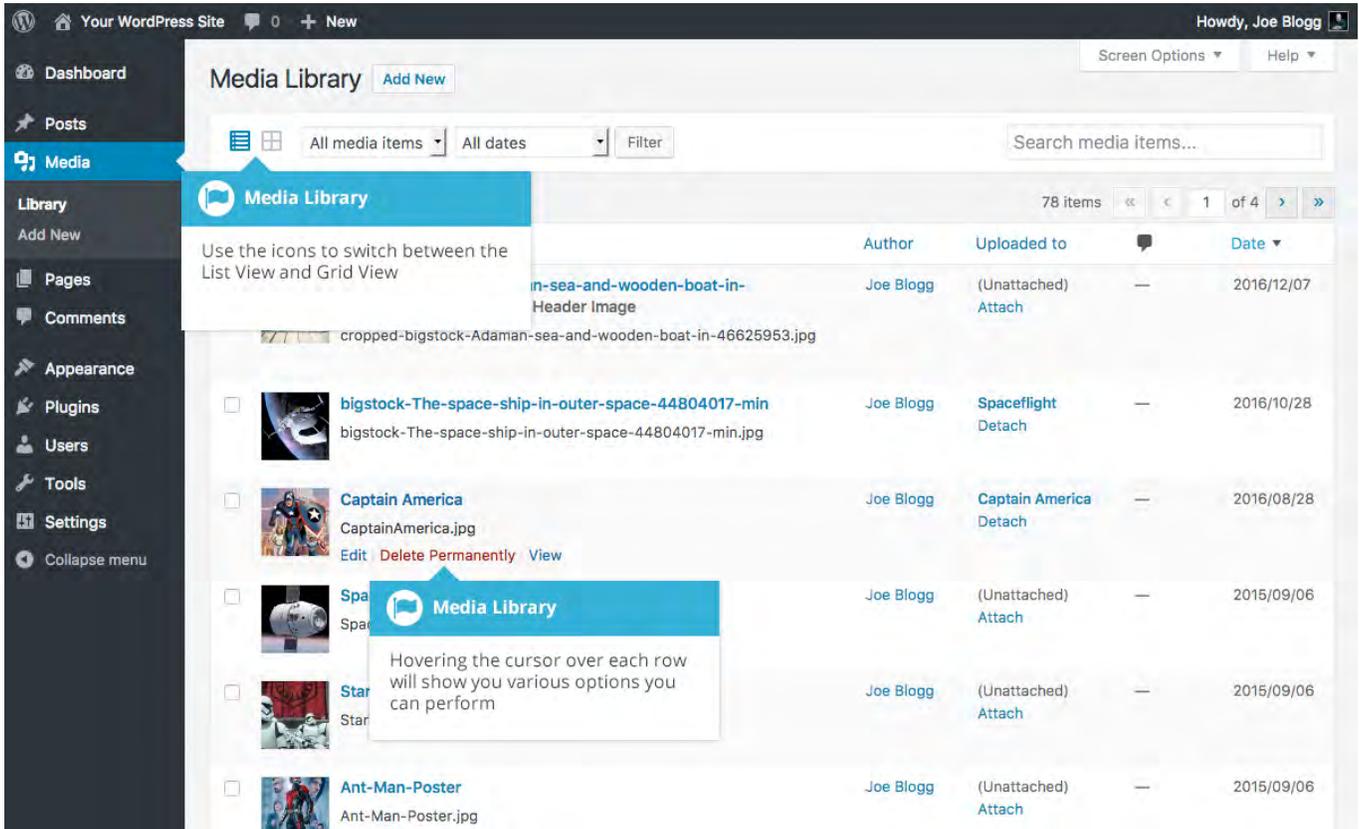
Media Library

The Media Library is where you can find all the files that you've uploaded. There are two different types of views you can select from when viewing your media library. You can click the *List View* icon (☰) to display your images in a list, or you can click the *Grid View* icon (田) to view your images in a Grid layout.

The Grid View will display a grid of thumbnail images for each of your media files. The Grid View employs infinite scrolling, rather than displaying your images over multiple pages. To view more images, simply scroll to the bottom of the page and more thumbnails are automatically loaded.



The List View will display your images vertically down the page, over multiple pages. By default, it will display 20 images per page but you can change this number by clicking the *Screen Options* link at the top-right of the page and changing the *Number of items per page*.



Both views show the most recently uploaded files first. There are also dropdown lists that allow you to filter the list of files that are currently being displayed, along with a search field to help search for files.

Within the List View, the list of files contains a small thumbnail version of the image or file, the file title and the file name along with the file extension which shows the type of file (JPG, MP3, etc.), the name of the Author who uploaded the file, the Page or Post which the image was uploaded to, the number of comments and the date the file was uploaded.

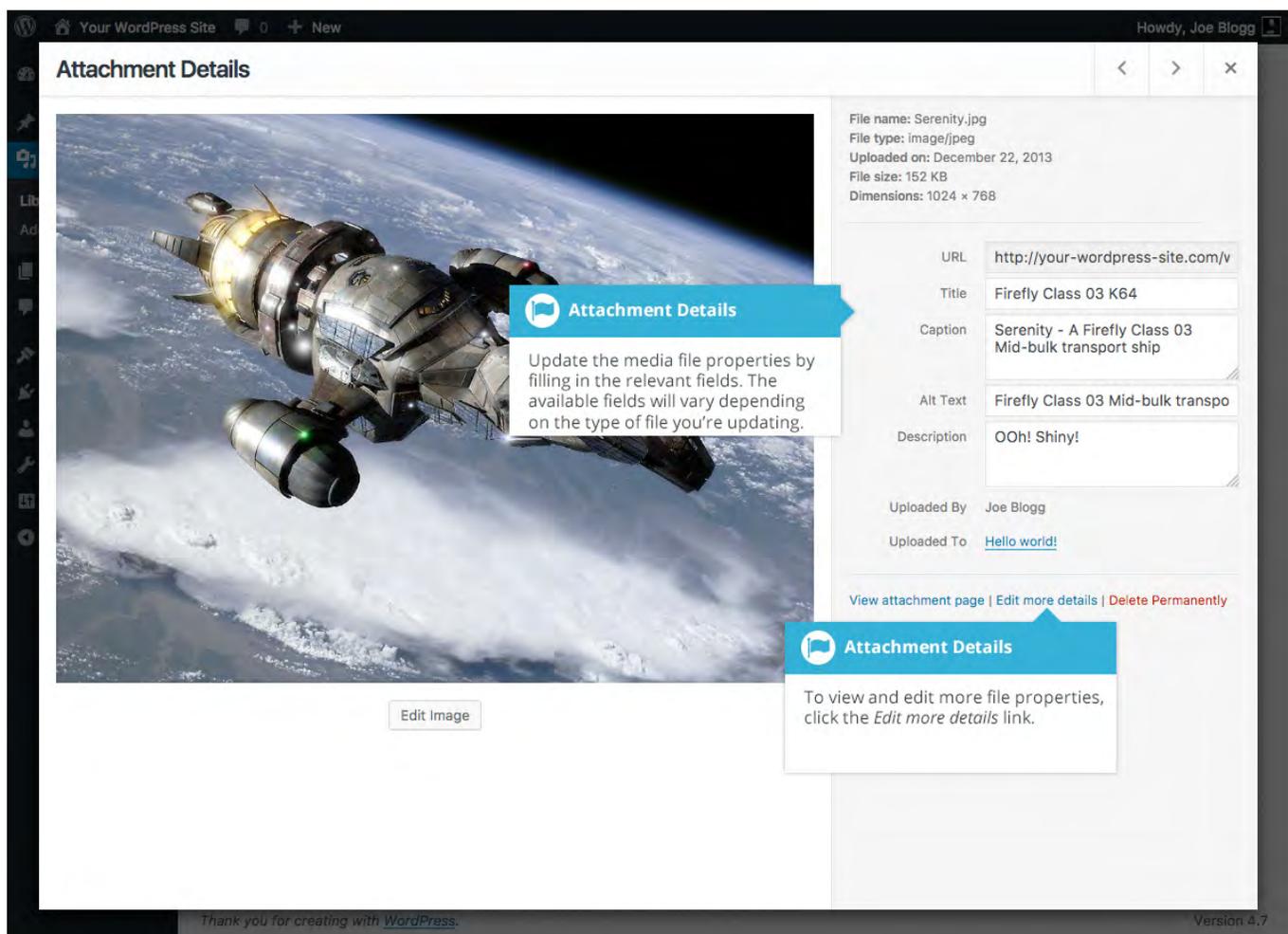
When hovering your cursor over each row in the List View, a few links will appear beneath the file name.

- **Edit** – Allows you to edit the file properties such as Title, Alt Text, Caption and Description. You can also perform some basic image manipulation
- **Delete Permanently** – Deletes the file permanently from the Media Library
- **View** – Will take you to the display page for that file

Viewing a File in the Media Library

The Grid View will display a grid of thumbnail images for each of your media files. Depending on the file type, you'll either see a thumbnail image for that particular file or an icon representation.

After clicking on a thumbnail within the Grid View, a pop-up window will display the properties for that particular file, along with giving you the ability to update certain properties. If the file is an image, you'll also see a larger version of that image. For supported audio and video files (M4a, MP4, OGG, WebM, FLV, MP3, and WAV) you'll see the appropriate media player. For other file types such as PDF's or Word Documents, there is a link to view the attachment page which in turn has a link to the actual file.



The screenshot shows the 'Attachment Details' window in WordPress. On the left is a large image of a Firefly Class 03 Mid-bulk transport ship. Below the image is an 'Edit Image' button. On the right is a form with the following fields:

- File name: Serenity.jpg
- File type: image/jpeg
- Uploaded on: December 22, 2013
- File size: 152 KB
- Dimensions: 1024 x 768
- URL:
- Title:
- Caption:
- Alt Text:
- Description:
- Uploaded By: Joe Blogg
- Uploaded To: [Hello world!](#)

At the bottom of the form are links: [View attachment page](#) | [Edit more details](#) | [Delete Permanently](#). Two callout boxes provide instructions: one says 'Update the media file properties by filling in the relevant fields. The available fields will vary depending on the type of file you're updating.' and the other says 'To view and edit more file properties, click the Edit more details link.'

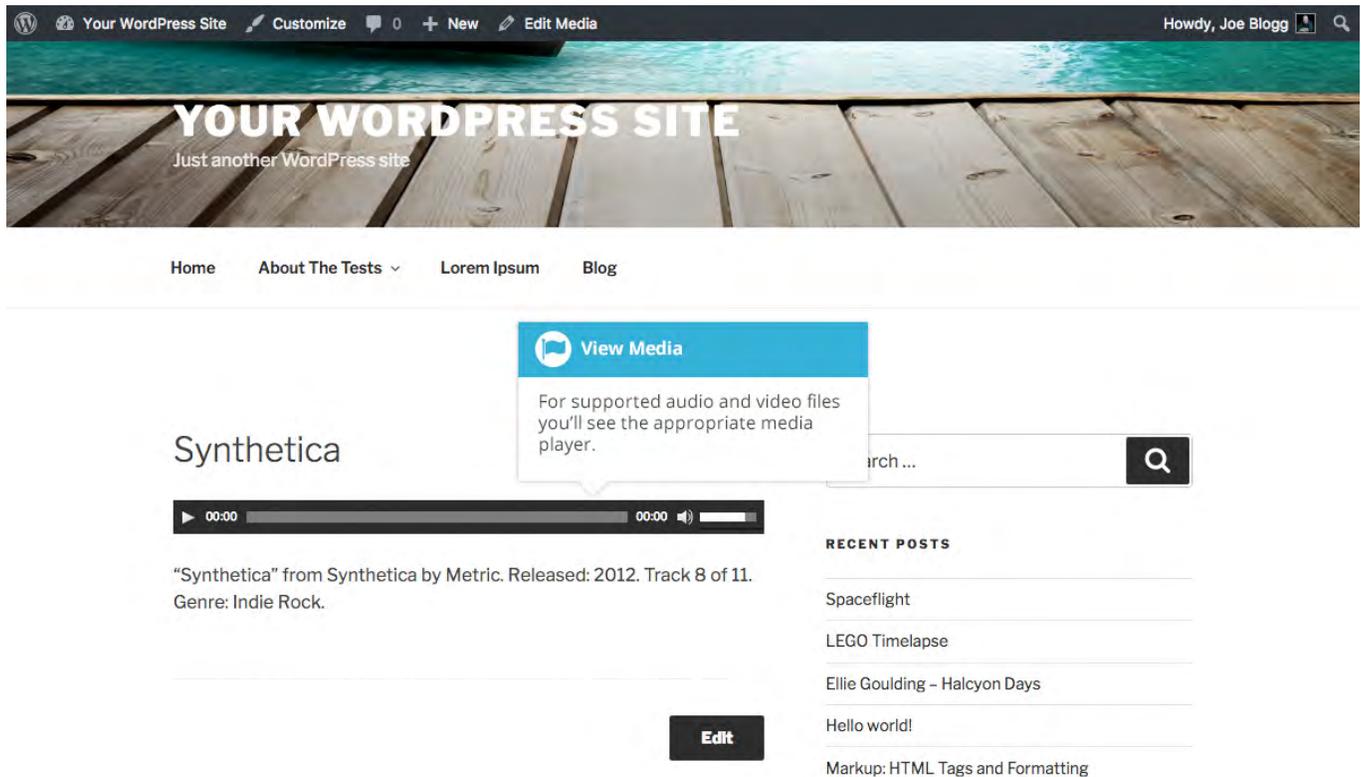
Within the List View, you can click the thumbnail image, the media file title or you can hover the cursor over the row and click the *Edit* link. The various file

properties will be displayed, along with giving you the ability to update certain properties. If the file is an image, you'll see a larger version of that image. For supported audio and video files (M4a, MP4, OGG, WebM, FLV, MP3, and WAV) you'll see the appropriate media player. For other file types such as PDF's or Word Documents, you'll simply see the file properties along with a button to view the attachment page which in turn has a link to the actual file.

The screenshot shows the WordPress 'Edit Media' interface. At the top, it says 'Edit Media' with an 'Add New' link. The media title is 'Firefly Class 03 K64' and the permalink is 'http://your-wordpress-site.com/hello-world/serenity/'. The main image is a spaceship (Serenity) in space. Below the image is an 'Edit Image' button. The 'Caption' field contains 'Serenity - A Firefly Class 03 Mid-bulk transport ship'. The 'Alternative Text' field contains 'Firefly Class 03 Mid-bulk transport ship'. The 'Description' field contains '00h! Shiny!'. On the right side, there is a 'Save' section with 'Uploaded on: Dec 22, 2013 @ 17:28', 'File URL: http://your-wordpress-site.com/wp-c', 'File name: Serenity.jpg', 'File type: JPG', 'File size: 152 KB', and 'Dimensions: 1024 x 768'. There are 'Delete Permanently' and 'Update' buttons. A tooltip titled 'Attachment Details' is overlaid on the right, stating: 'Update the media file properties by filling in the relevant fields. The available fields will vary depending on the type of file you're updating.'

Clicking the *View* link, when hovering your cursor over a row, will display the attachment page for that particular media file. If the file is an image, you'll see a

larger version of that image. For supported audio and video files you'll see the appropriate media player and for other file types such as PDF's or Word Documents, you'll see a link to the actual file.

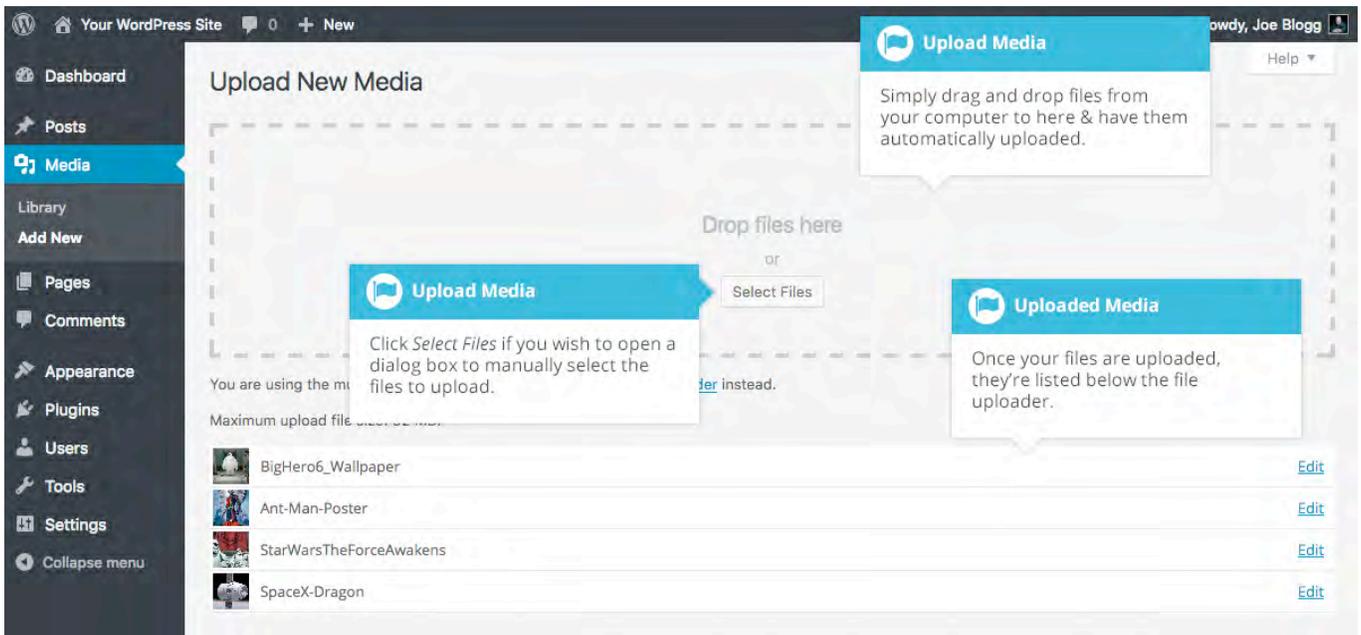


Adding a File to the Media Library

To add a new file to the Media Library, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

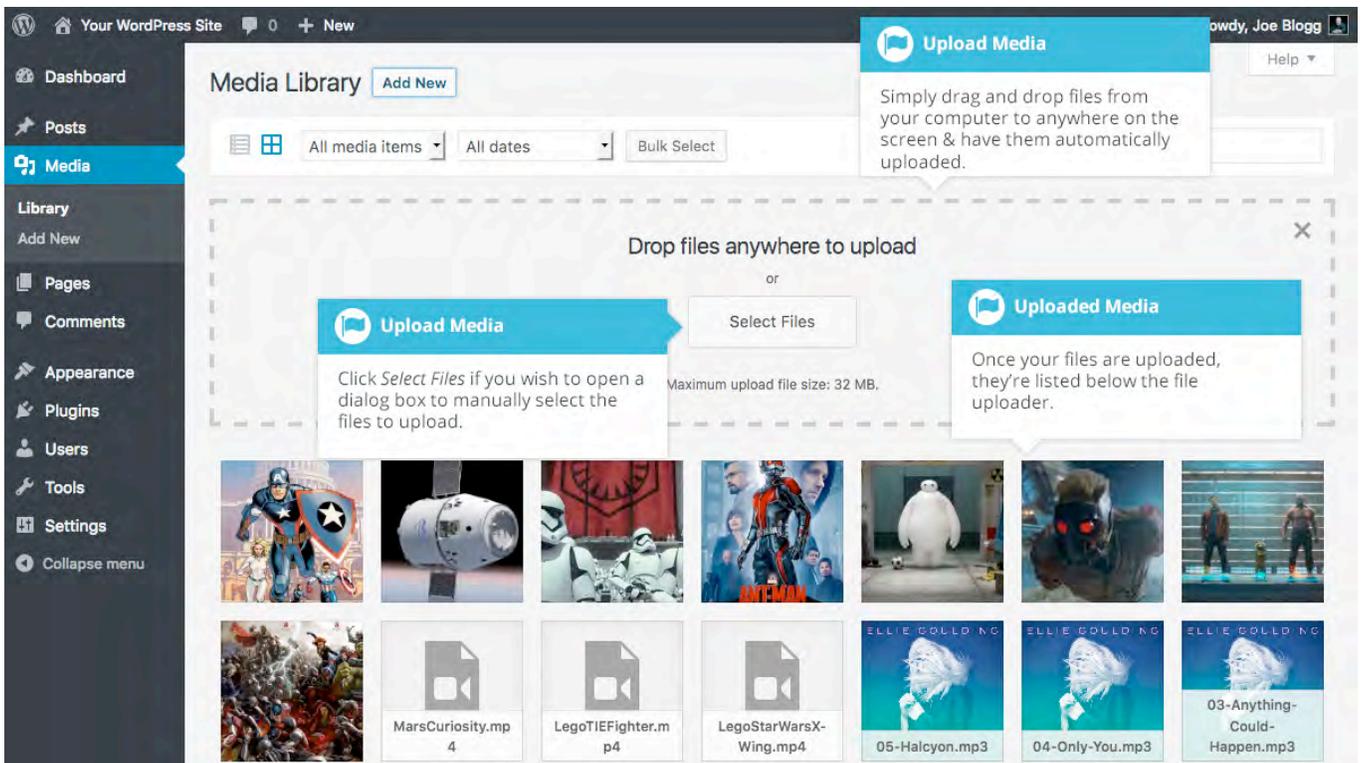
If you click the *Add New* button when you're viewing the Media Library in the *List View*, or click the *Add New* link in the menu, simply drag your images from wherever they are on your computer, into the area marked *Drop files here*. Your file(s) will be automatically uploaded.

Once your images or files are uploaded, they're listed below the file uploader. If you'd like to edit the file properties, click the *Edit* link next to the file.



If you click the *Add New* button when you're viewing the Media Library in the *Grid View*, you can drag your images from wherever they are on your computer, to anywhere on the screen. Your file(s) will be automatically uploaded.

Once your images or files are uploaded, they're displayed below the file uploader, with the rest of your media.

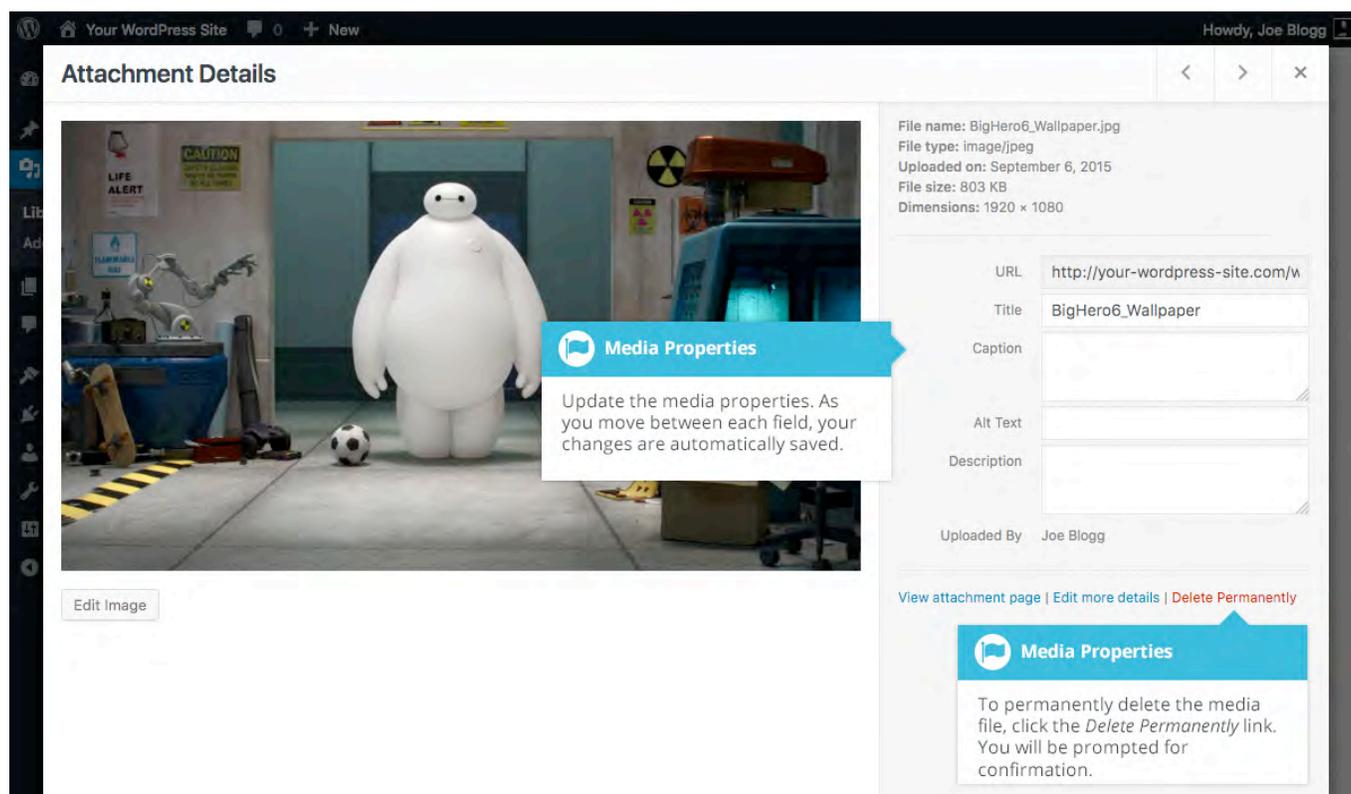


When uploading files, you can also click the *Select Files* button and then select the files that you'd like to upload, using the dialog window that is displayed.

Editing the File Properties

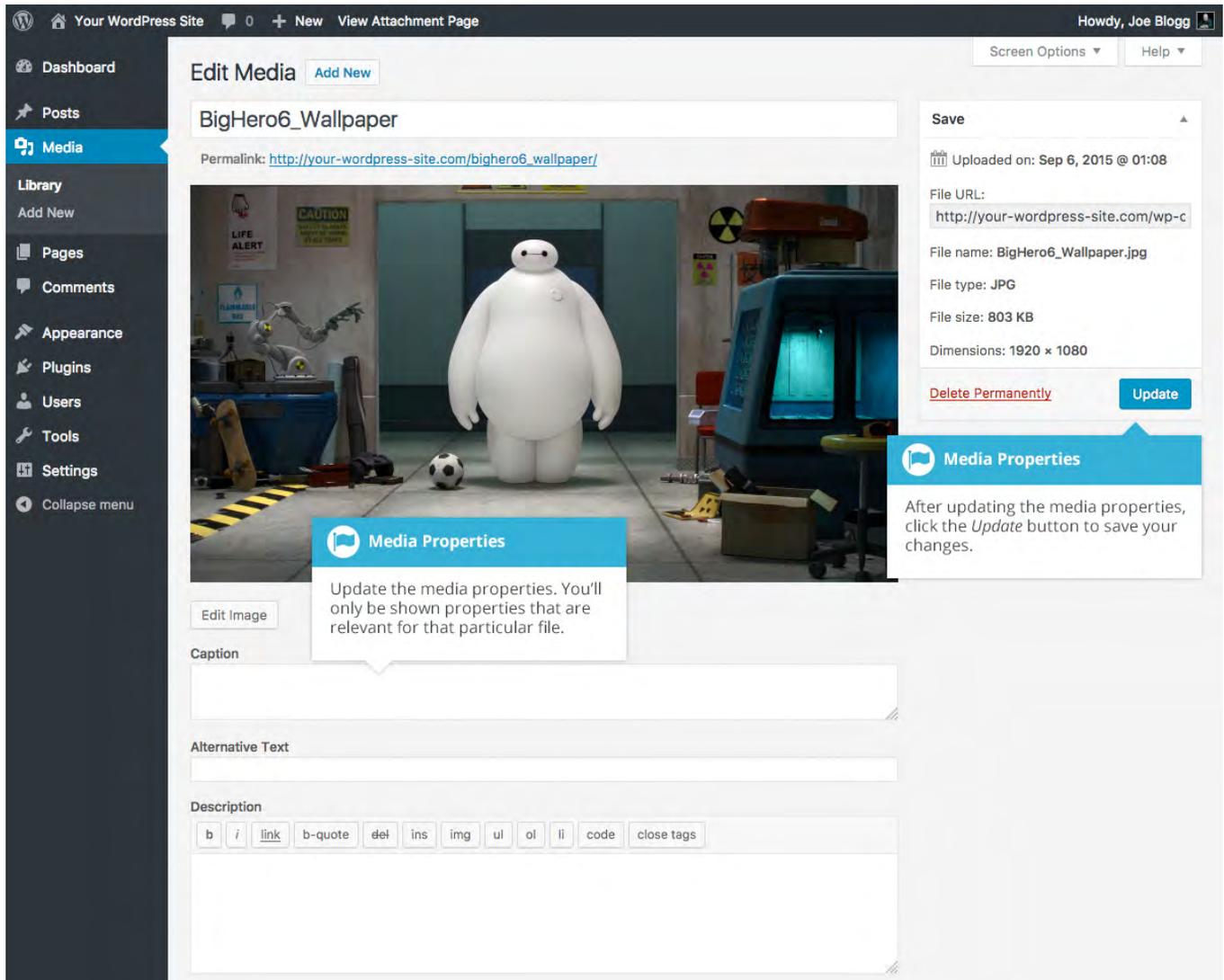
If you're viewing your files using the *Grid View*, simply click on one of your media files and you'll be presented with a pop-up window that displays the relevant properties for that particular file.

After updating each field your changes will be automatically saved. You can use the arrow buttons at the top of the pop-up window to navigate to the previous or next image. Click the 'x' in the top-right of the pop-up window to return to the media Grid View.



To edit the properties of an existing file when using the *List View* within the Media Library, hover the cursor over the particular row that contains the file you wish to edit and click the *Edit* link. Alternatively, you can also click the file title or the thumbnail image. Clicking the *Edit* link next to the file after it's just been uploaded, will also allow you to edit its properties.

After clicking *Edit*, the relevant properties for that particular media file are displayed, including the title, URL, filename, file type and in the case of an image, the file dimensions. When editing the file properties, the *Alternative Text* field will only be displayed for images.



- **Title** – Although the field isn't labelled, the *Title* is the field at the very top of the page (when editing the image from the *List View*). The Title is displayed as a tooltip when the mouse cursor hovers over the image in the browser
- **Caption** – is displayed underneath the image as a short description. How this displays will be dependent on the WordPress theme in use at the time. You can also include basic HTML in your captions

- **Alternative Text** – This field is only displayed for image files. The Alternative Text is displayed when the browser can't render the image. It's also used by screen readers for visually impaired users
- **Description** – This content is displayed on the file's attachment page
- **Metadata - Artist** – This field is only displayed for audio files. It allows you to specify the recording artist
- **Metadata - Album** – This field is only displayed for audio files. It allows you to specify the album to which the audio file belongs to

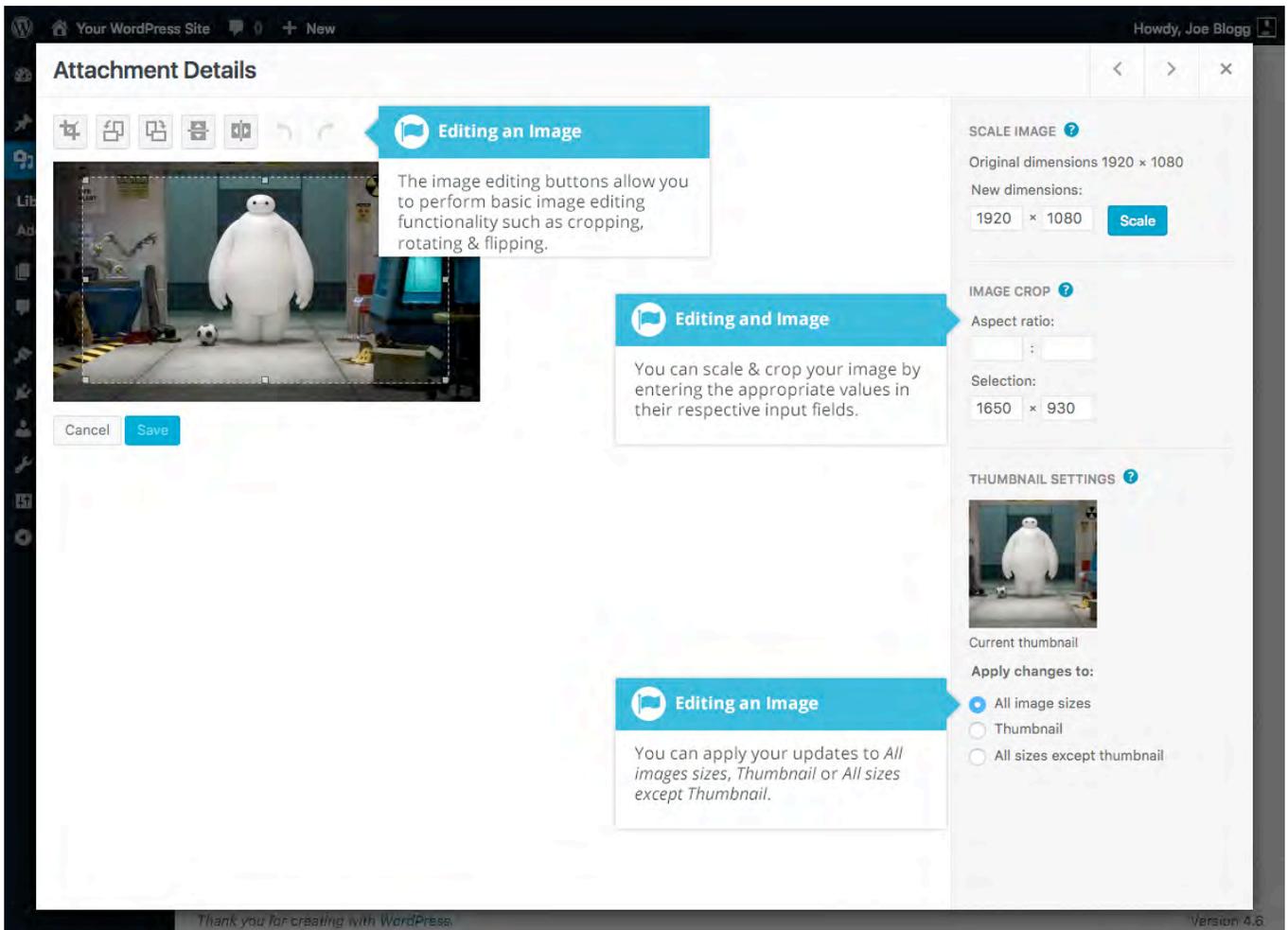
Once the file properties are updated click the *Update* button to save your changes.

Editing an Image

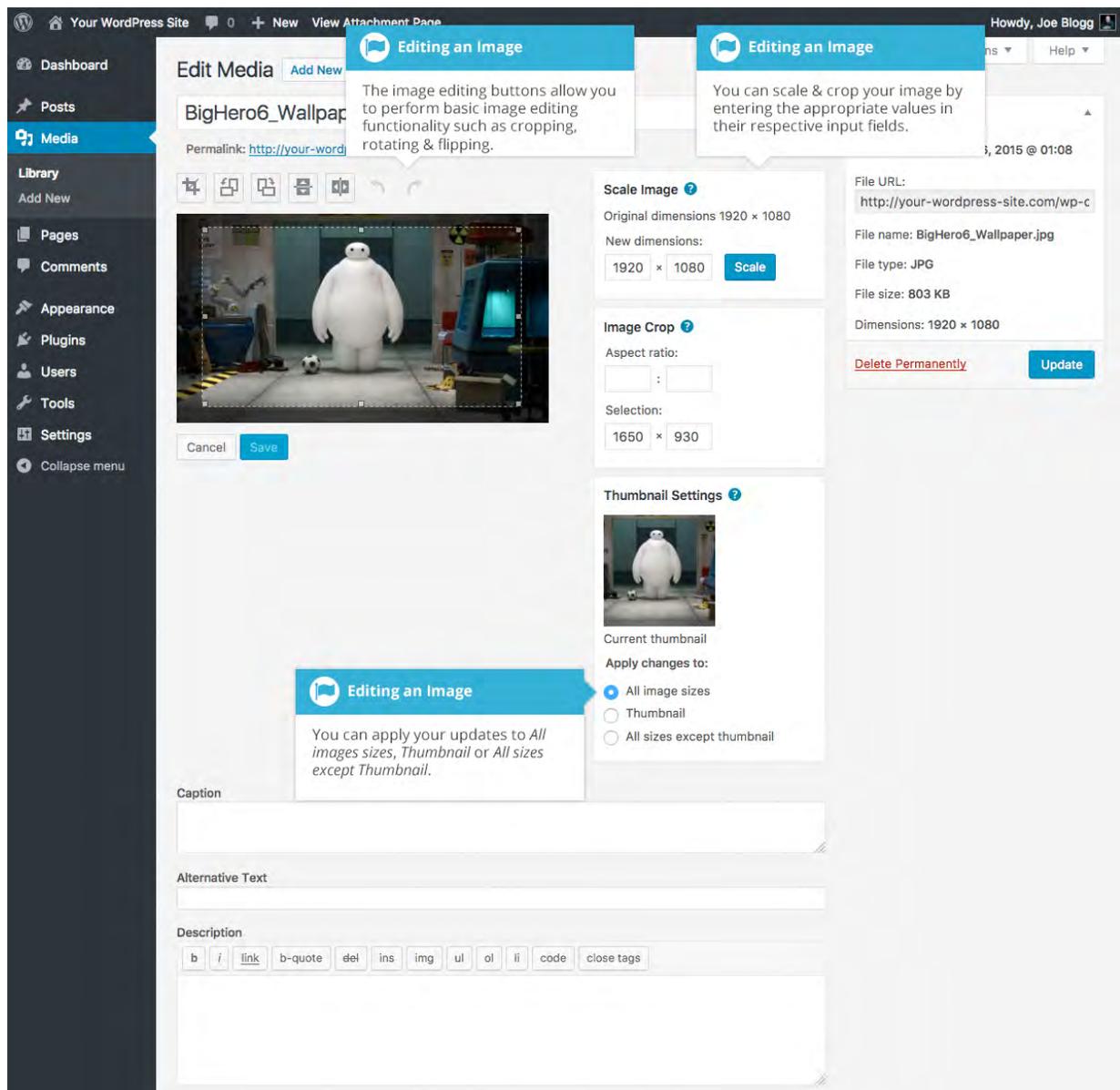
WordPress has a basic image editing tool that allows you to perform some simple manipulation with your uploaded images. You're able to rotate and flip your images as well as scale them and crop them to different sizes.

When editing the file properties of an image (as opposed to other file types like documents or PDFs), click the *Edit Image* button that appears just below the image to show the image editing tools.

If you click the *Edit Image* button whilst using the *Grid View*, the image editing tools will appear in the pop-up window.



If you click the *Edit Image* button whilst using the *List View*, your page will look slightly different to the above *Grid View*. As well as the image editing tools, you'll also see the properties of the file such as the file size and dimensions. You can also still update the *Caption*, *Alternative Text* and *Description*.



No matter what view you're using, just above the image you'll find the following image editing buttons:



Crop – Click on the image and drag the selection box to the size that you'd like the image cropped. Click the Crop button to crop the image to the new size



Rotate counter-clockwise – Rotate the image 90° counter-clockwise



Rotate clockwise – Rotate the image 90° clockwise



Flip vertically – Flip the image vertically



Flip horizontally – Flip the image horizontally



Undo – Undo the last change



Redo – Redo the last change

To scale your image to a new size, simply enter the *width* or *height* dimensions in the appropriate field and click the *Scale* button. For best results, scaling should be done before performing any other operations like cropping, flipping or rotating the image. It's important to note that images can only be scaled down, not up.

After entering one scale value, the other value will change automatically so as to keep the image in proportion. The original image dimensions are displayed just above the input fields, for your reference.

There are several ways to crop your image. The easiest is to simply click on the image and drag the selection box to the appropriate size. If you'd like your image cropped to a specific ratio, enter the values in the *Aspect Ratio* input fields (e.g. 1:1 (square), 4:3, 16:9 etc.). You can then hold down the *shift key* and drag one of the edges of your selection to enlarge or reduce the size, while keeping this aspect ratio locked. If there is already a selection made, specifying the aspect ratio will automatically change the selection to match it.

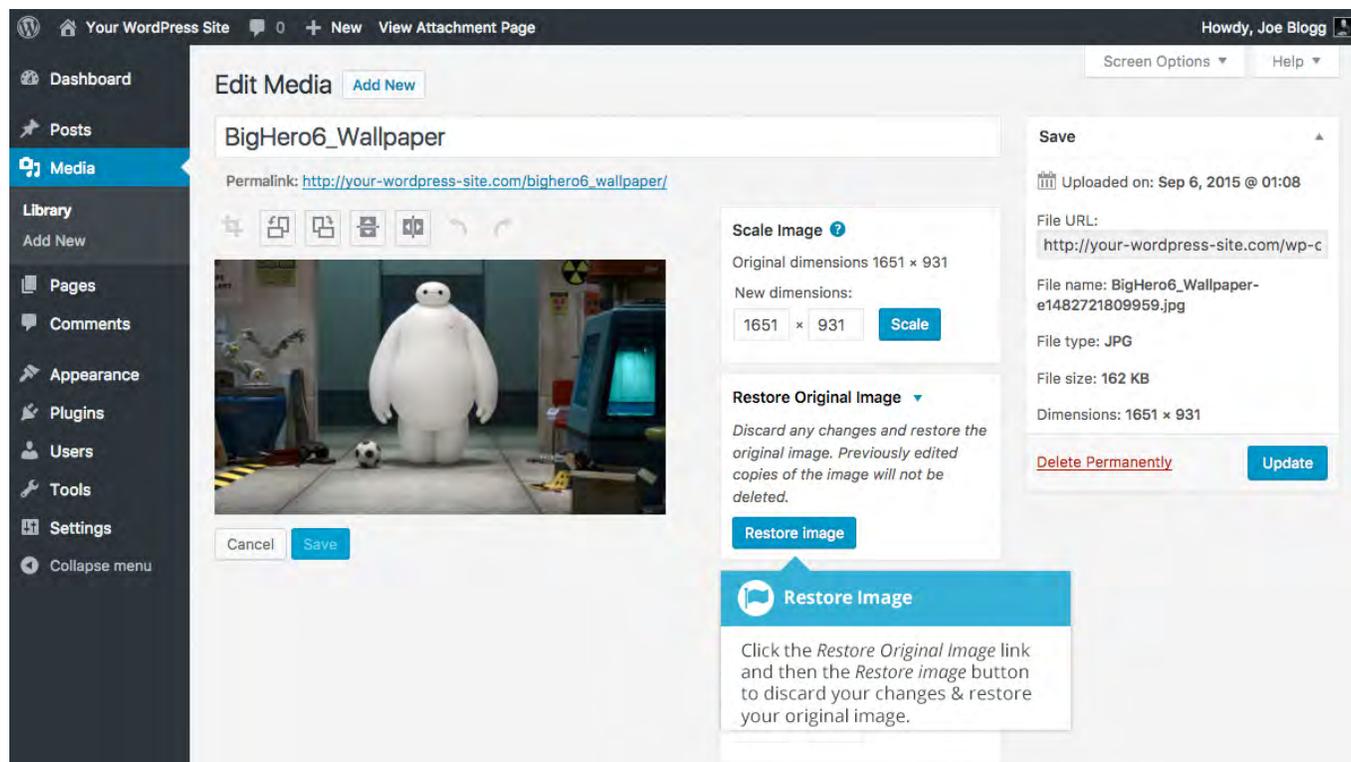
Whenever the selection box is adjusted, the dimensions are displayed in the *Selection* input fields. You can also manually enter the dimensions of the selection box (in pixels) by entering values into these two fields. Once your selection box is adjusted, simply click the *Crop* button just above the image to crop the image to this new size.

By selecting one of the options in the *Thumbnail Settings* panel, you have the option to apply your changes to *All image sizes*, just the *Thumbnail* image or *All sizes except Thumbnail*.

Click the *Save* button to save your changes.

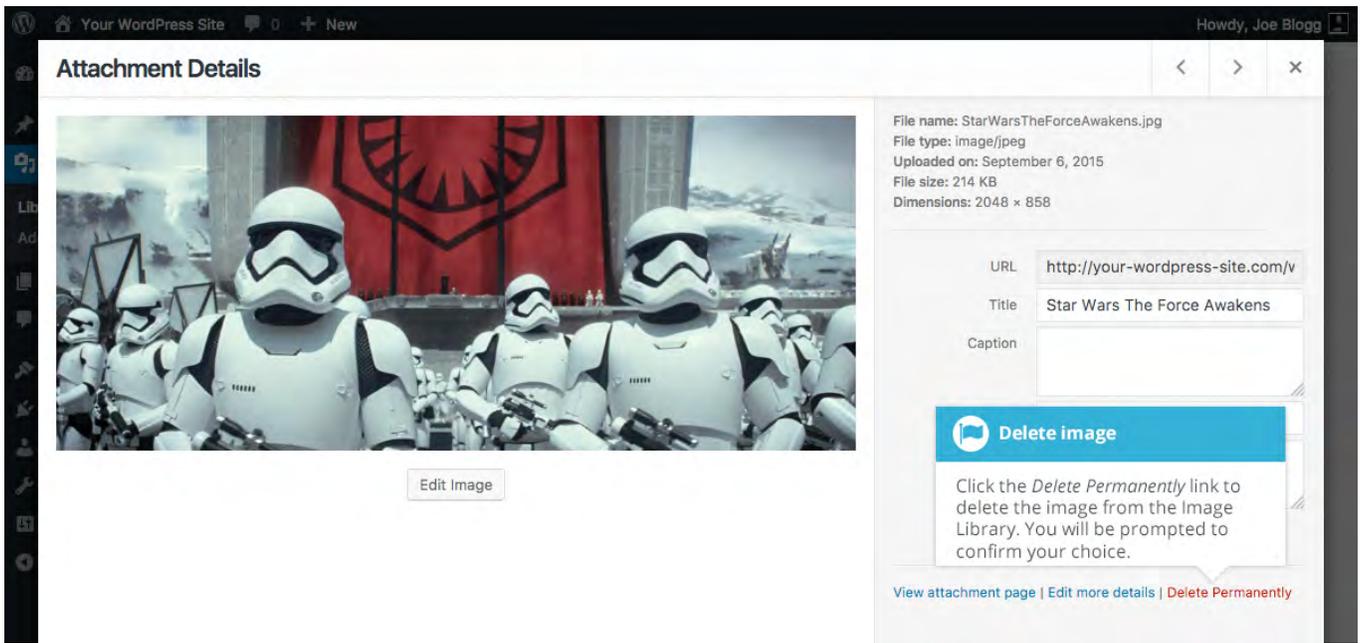
Click the *Update* button to return to the main Media Library page.

If you'd like to revert back to your original image, click the *Edit Image* button again to return to the image editor. A new *Restore Original Image* link is displayed just below the *Scale Image* link. Click the *Restore Original Image* link and then click the *Restore image* button to discard your changes and restore your original image.

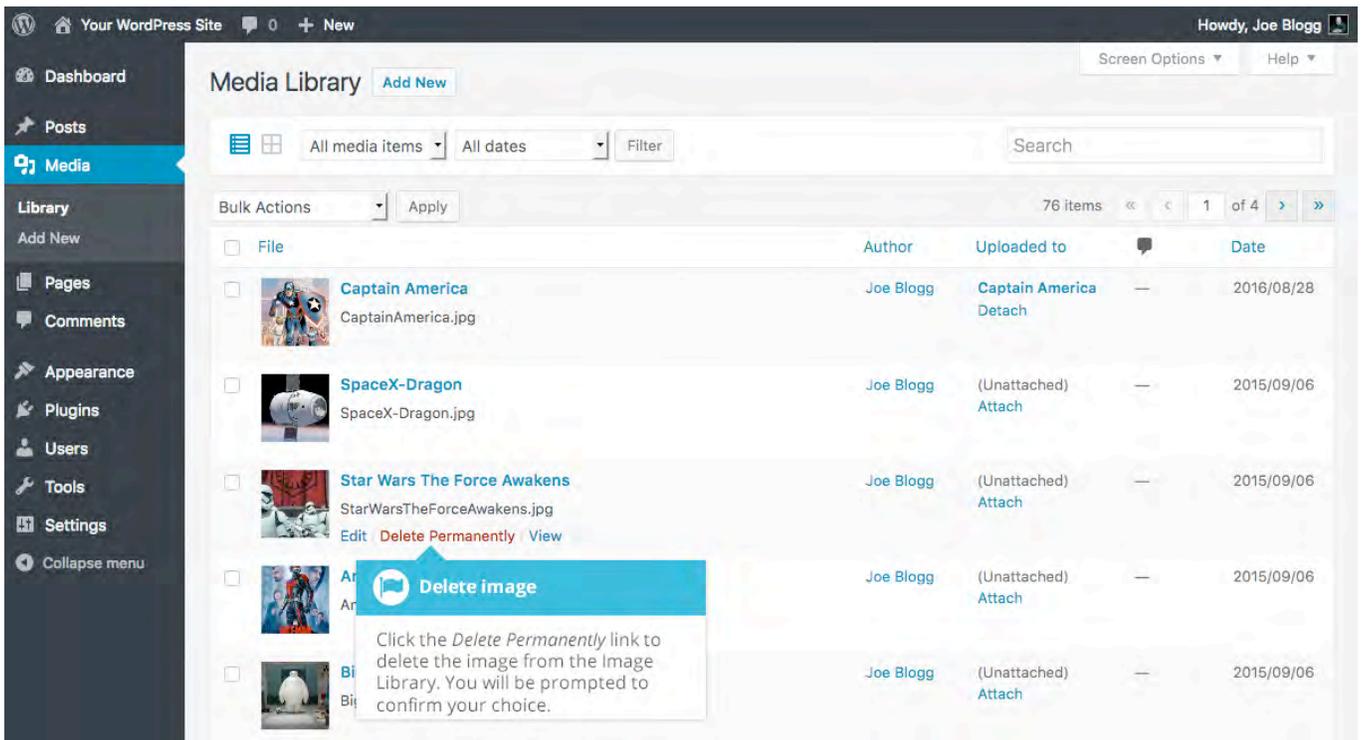


Deleting a File from the Media Library

To delete a file from the Media Library when using the *Grid View*, first click an image to view the File Properties, then click on the *Delete Permanently* link that appears in the pop-up window.



To delete a file from the Media Library when using the *List View*, click on the *Delete Permanently* link that appears beneath the file name when hovering your cursor over each row.



After you click the *Delete Permanently* link in either view, you'll be prompted with a confirmation message.

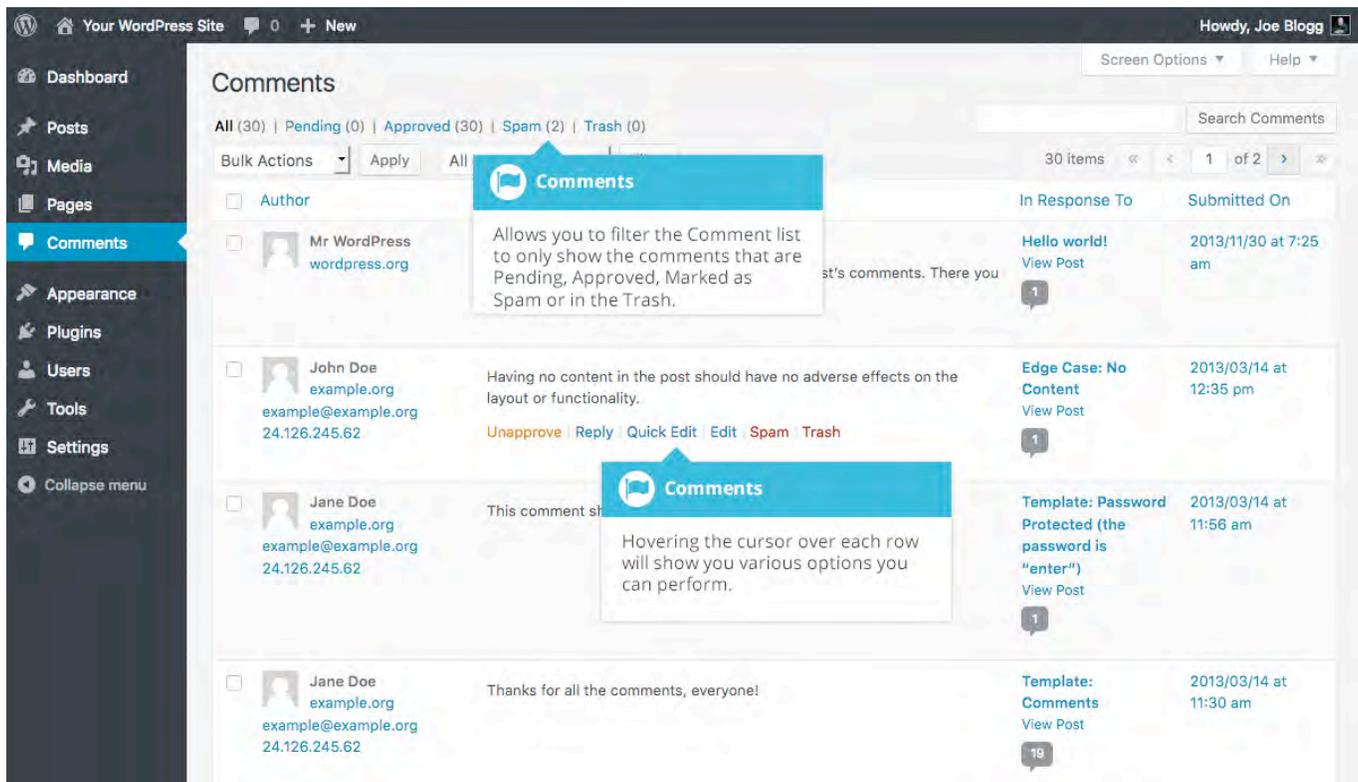
Click the *OK* button to delete the file or click the *Cancel* button to return to the Media Library.

Comments

Comments are a feature of blogs which allow readers to respond to Posts. Typically, readers simply provide their own thoughts regarding the content of the post, but they may also provide links to other resources, generate discussion, or simply compliment the author for a well-written post. Comments allow you to interact more with your site visitors as well as generate feedback and discussion on your Posts.

Comments can be controlled and regulated through the use of filters for language and content, and if you prefer, can also be queued for approval before they are visible on the web site. This is useful in dealing with [comment spam](#).

When you click on the *Comments* menu option, you'll be shown a list of all the comments on your site.



At the top of the screen there are links that allow you filter the comment list to only show the comments that are Pending, Approved, Marked as Spam or that are in the Trash. The number in brackets will advise how many there are for that particular type.

As well as the standard settings that allow you to manage your comments, the default WordPress install comes with an excellent plugin that helps to filter out spam from your comments. This plugin is called Akismet.

After activating the Akismet plugin, you need to supply it with an API Key. You can grab an API key and find out more information on the [Akismet website](#).

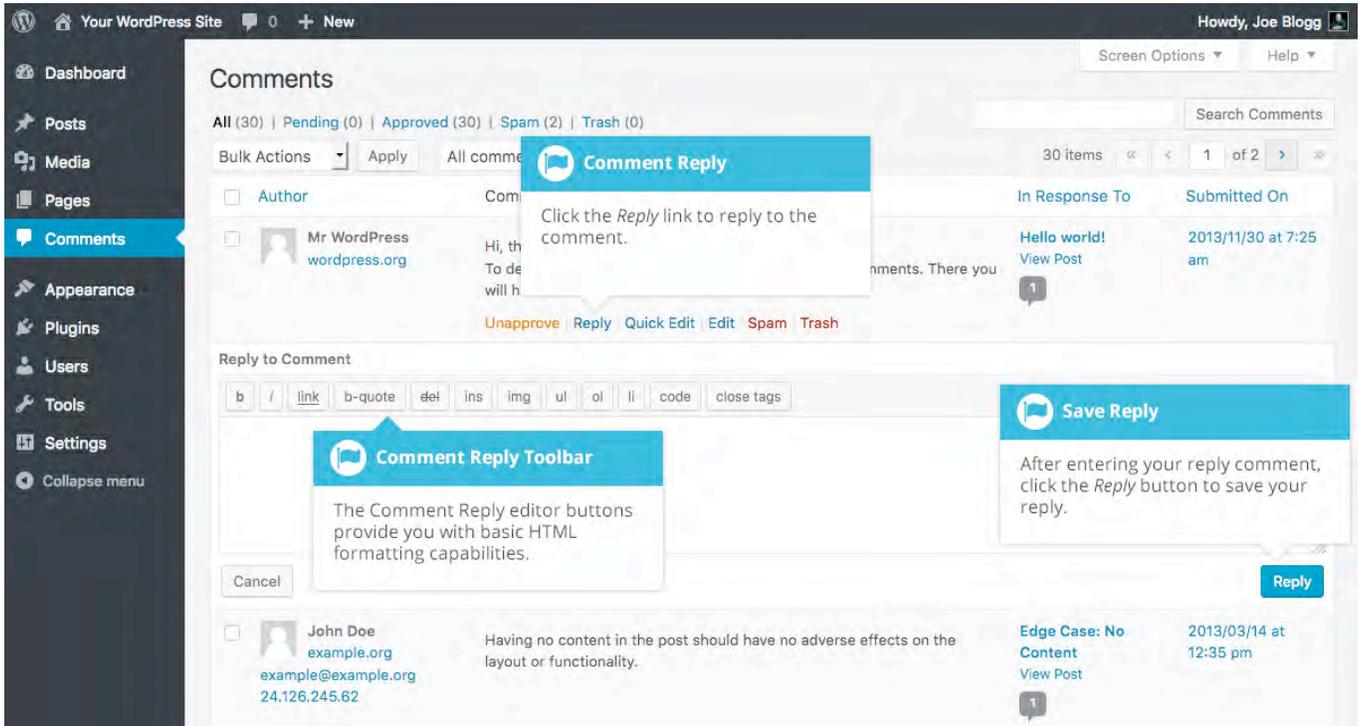
When hovering your cursor over each row in the list of Comments, a few links will appear beneath the comment.

- **Unapprove/Approve** – Allows you to unapprove the comment. This will stop it displaying on your site. If the comment is already unapproved then this link will change to *Approve*, to allow you to approve the comment
- **Reply** – Allows you to write a reply comment
- **Quick Edit** – Allows you to quickly edit the commenter's Name, Email or URL as well as the actual comment
- **Edit** – Allows you to edit the commenter's Name, Email or URL as well as the actual comment. It also allows you to mark the comment as either Approved, Pending or Spam and change the Date and Time
- **Spam** – Allows you to mark the comment as spam
- **Trash** – Allows you to mark the comment as Trash. Once it's in the Trash, you can either restore it if you made a mistake, or delete it permanently

If you would like to change the status of numerous Comments at once, click the checkboxes next to the Comment(s) you would like to change and then choose either *Unapprove*, *Approve*, *Mark as Spam* or *Move to Trash* from the *Bulk Actions* dropdown list at the top of the page. After selecting the appropriate option, click the *Apply* button.

Replying to a Comment

To respond to a comment that someone has written on one of your Posts, simply hover the mouse over the comment and click the *Reply* link when it appears. An edit field will then appear beneath the comment where you can type your reply.



When you've written your comment, click the *Reply* button or alternatively, click *Cancel* to stop replying and cancel your editing.

The editor that appears when replying or editing a comment (using either the *Reply*, *Quick Edit* or *Edit* links) is much like the editor when creating or editing a Page or Post, only not as intuitive. At the top of the editor there are numerous formatting buttons. These buttons provide you with basic html formatting capabilities when composing a new reply comment or editing an existing comment.

The buttons work in two ways. Clicking a button without highlighting any text first, will simply insert the opening html tag relevant for that button. As an example, clicking the *Bold* button will insert the `` html tag into your comment. Clicking the *Bold* button again will close the tag by inserting the closing `` tag. If you highlight some text prior to clicking a button, both the opening and closing tags will be inserted around that highlighted text. For example, highlighting the text, 'bold text', prior to clicking the *Bold* button will insert '`bold text`'.



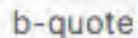
Bold – Bold text



Italic – Italicise text



Link – Used to insert a website link. When the button is clicked a pop-up window will appear where you type in the URL that you would like to link to



Blockquote – Used as a way of showing a quote. How this looks will be entirely dependent on the Theme that your site is currently using



Delete - Used as a way of showing deleted text. How this looks will be dependent on the Theme but is usually done by showing the text with a strikethrough



Insert - Used as a way of showing inserted text. How this looks will be dependent on the Theme but is usually done by showing the text with an underline



Image – Used to insert an image into the comment. When the button is clicked a pop-up window will appear where you type in the URL of the image that you would like inserted



Unordered List – Used to insert an unordered (or un-numbered) list



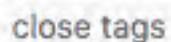
Ordered List – Used to insert an ordered (or numbered) list



List Item – Used to insert a list item into your ordered or un-ordered list



Code – Used for indicating a piece of code



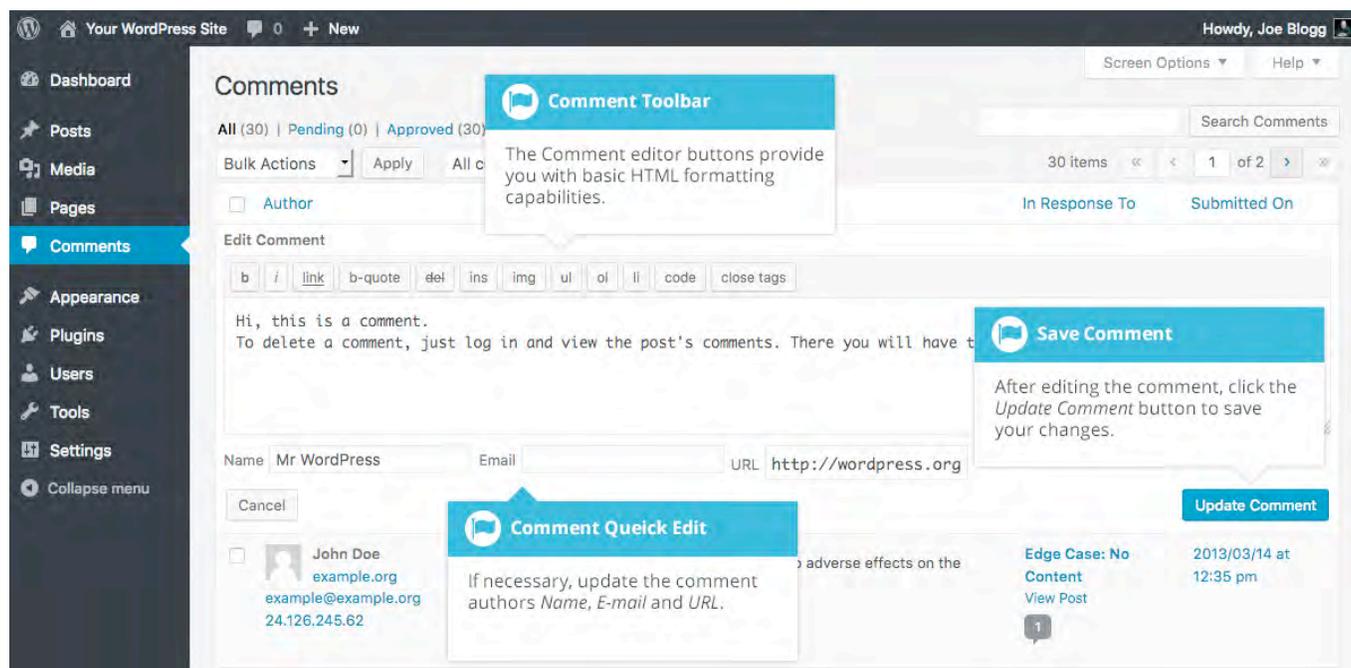
Close Tags – Used to close open tags. If for example, you clicked both the *Bold* and *Italic* buttons to insert their opening tags, clicking the close tags button will insert both of the matching closing tags, in the correct order

Editing a Comment

There are two ways to edit a comment. Once you hover over an individual comment you can click the *Quick Edit* link or the *Edit* link. Both perform a similar function except that the *Edit* option also allows you to mark the comment as either Approved, Pending or Spam as well as change the Date and Time.

Quick edit

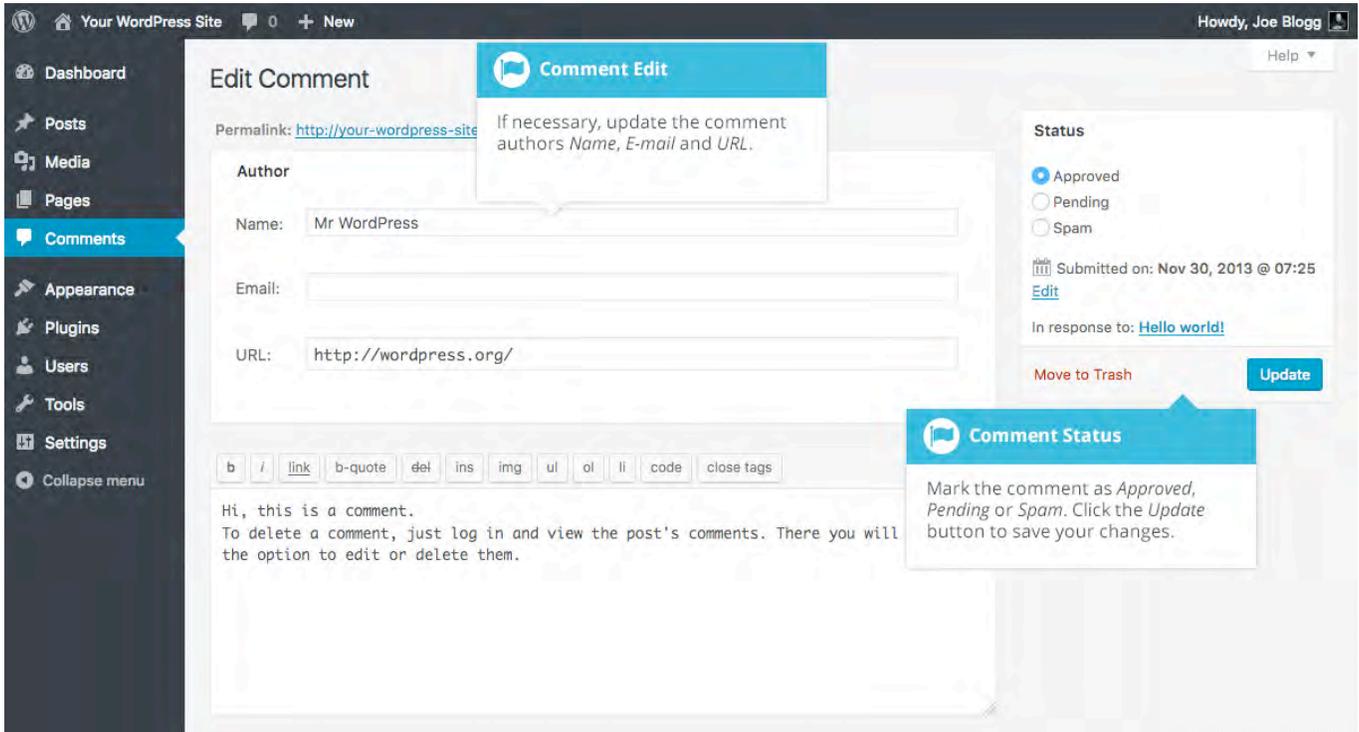
Clicking *Quick Edit* will replace the comment with an editor that allows you to update the comment, the comment authors name, email address and URL.



Once you have finished, click *Update Comment* to save your changes or click *Cancel* to cancel your changes and return to the list of comments.

Edit

Clicking *Edit* will display the editor on a new page. Like the *Quick Edit* option, you can update the comment, the comment authors name, email address and URL. The *Edit* option also gives you the ability to set the comment Status and change the comment Date and time. The comment status can be set to *Approved*, *Pending* or *Spam*. You also have the option to move the item to the Trash by clicking on the *Move to Trash* link.



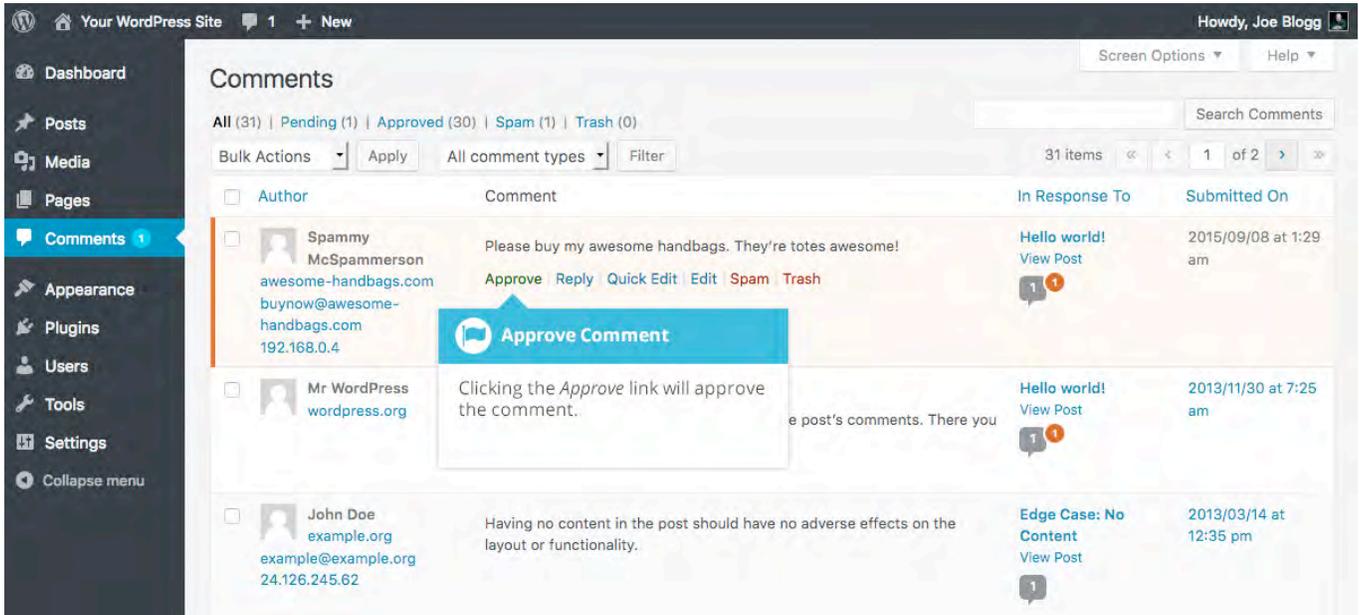
You can change the date and time that the comment was submitted by clicking on the *Edit* link next to the date and time. After clicking *Edit*, several fields appear below the original date and time. Update the fields if required and click the *OK* button to save the new date and time.

Once you have finished updating the comment, click the *Update* button to save your changes. If you want to cancel your changes, click the browser *Back* button or click on the Comments menu option to return to the list of comments.

Unapproving and Approving Comments

If an inappropriate comment has been submitted, you may wish to Unapprove it. This will stop the comment from displaying on your site. Hover your cursor over the comment and click the *Unapprove* link to unapprove the comment.

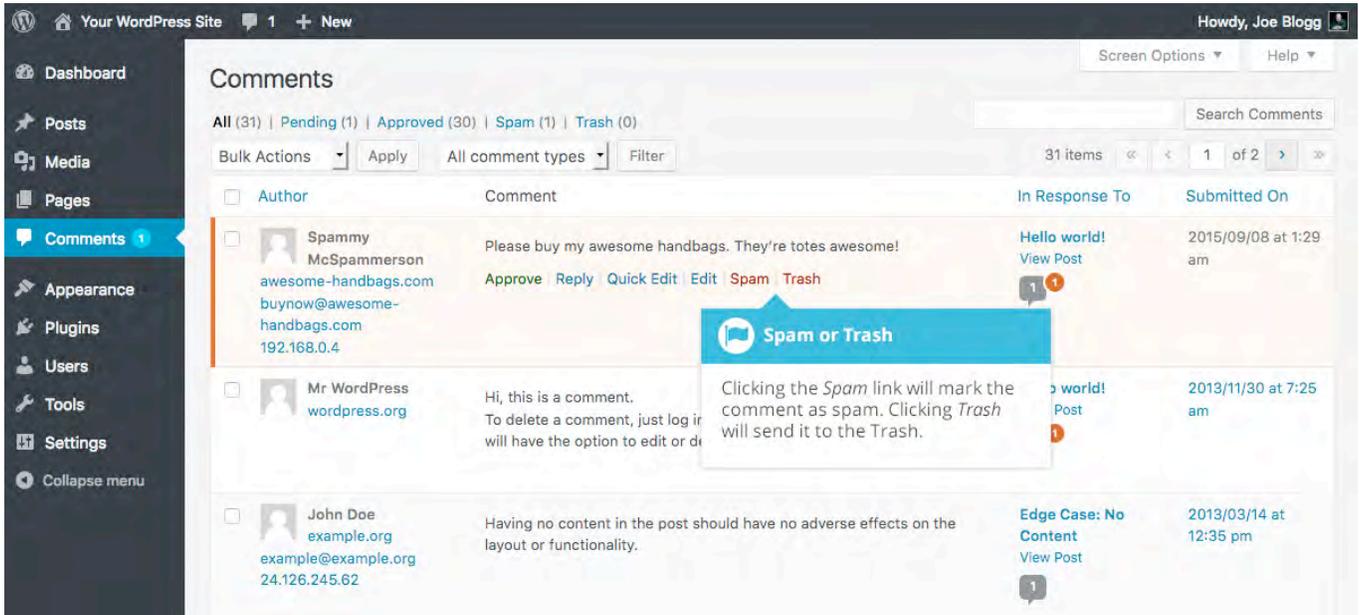
Comments that are already Unapproved will be displayed with a different coloured background within your list of comments. They will also be highlighted with a red vertical bar down the left side of the row. Hovering your cursor over the comment will display an *Approve* link instead of an *Unapprove* link.



Marking Comments as Spam and Trash

If a spam comment has been posted to your site you can mark it as spam simply by hovering your cursor over the comment and clicking the *Spam* link. If you're using the Akismet plugin and you come across a spam comment that Akismet missed, marking it as spam will help Akismet learn and it will be less likely to miss similar spam in the future.

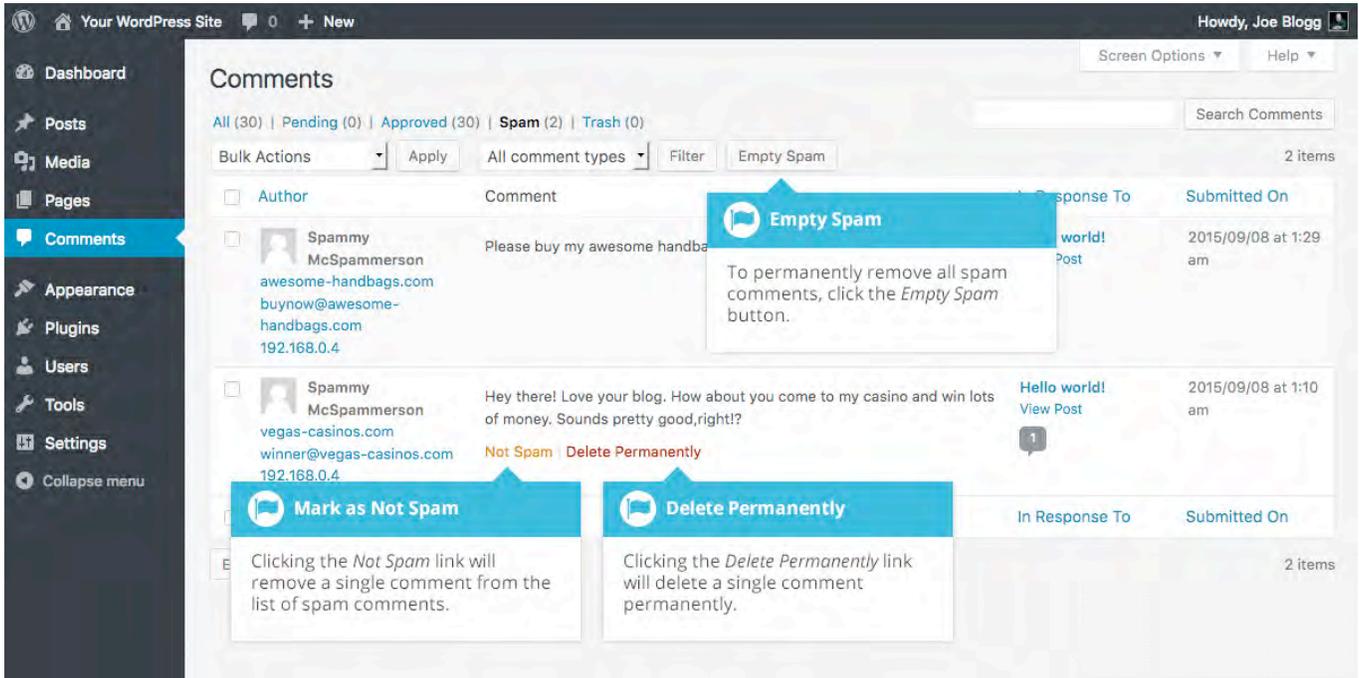
If you simply want to remove a comment, hover your cursor over it and click the *Trash* link.



To empty the Trash, click on the *Trash* link at the top of the page to display all the comments that have been marked as Trash. This link will be displayed along with a number within brackets which indicates how many comments are marked as Trash. To permanently remove all these comments, click the *Empty Trash* button. You will not be prompted for confirmation.

To remove all the spam comments, click on the *Spam* link at the top of the page to display all the comments that have been marked as spam. This link will be displayed along with a number in brackets which indicates how many spam comments there are. To permanently remove all these comments, click the *Empty Spam* button. You will not be prompted for confirmation.

You can also delete a single spam comment permanently by clicking on the *Delete Permanently* link that appears when hovering your cursor over each row. You will not be prompted for confirmation.



If you find there are comments that have been marked as spam that shouldn't be, click the checkboxes next to them and select *Not Spam* from the *Bulk Actions* drop down at the top of the page. Click the *Apply* button to confirm your choice. Alternatively, click the *Not Spam* link that appears when hovering your cursor over each row.

Appearance

The various Appearance menus allow you to change how your site looks and behaves. If your site has been setup for you by a third party then it's more than likely that you won't need to change any of the settings in here.

Depending on the theme that your site is running, you may find that you don't have all the menu options listed here, or you may have a couple of different ones. The reason for this is that a couple of the options under the *Appearance* section are theme based. For example, the default Twenty Seventeen theme allows you to customize options for how your theme displays. Not all themes will have these option pages, or if they do, they may be under another menu entirely.

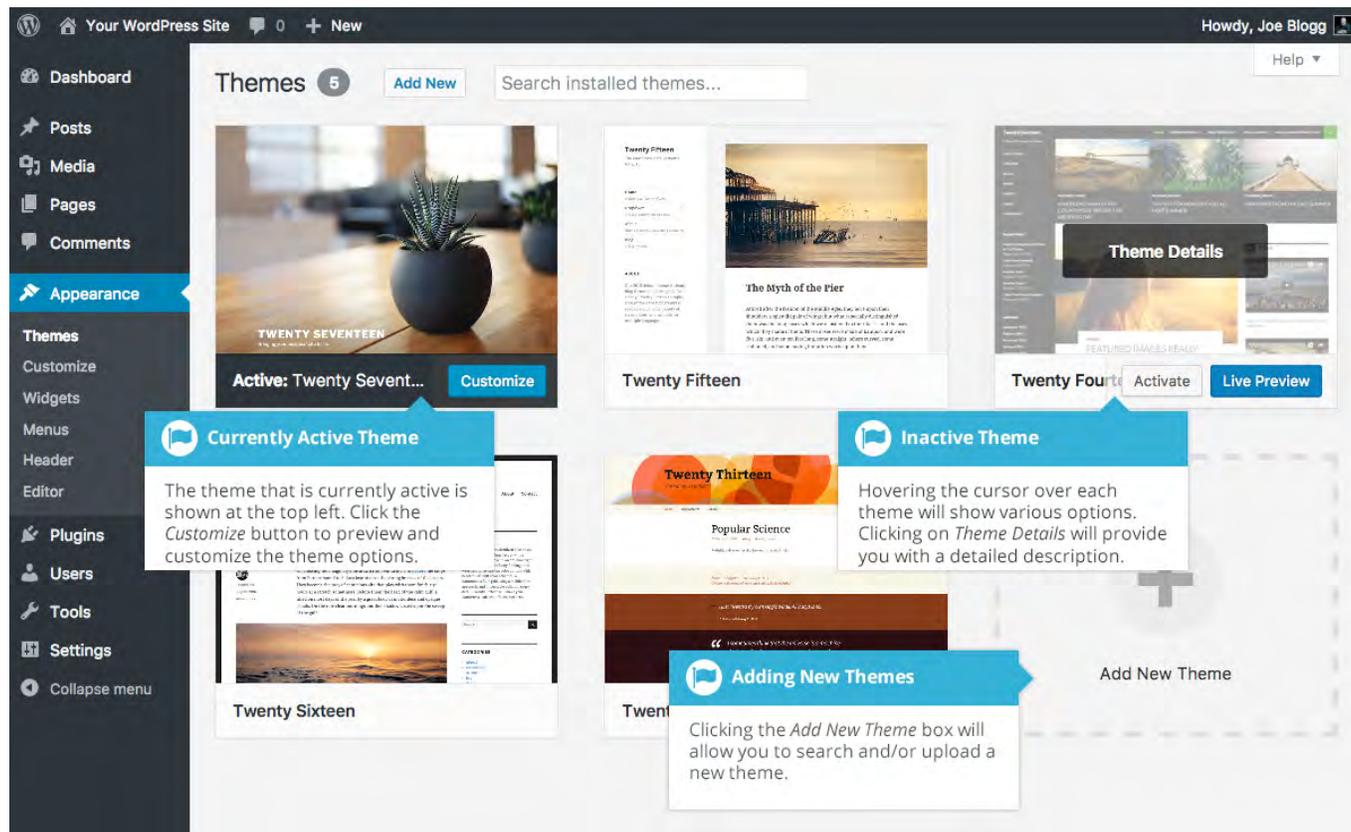
Selecting your Theme

The overall appearance of a WordPress site is controlled by the Theme. Although there is a default theme that comes installed with WordPress, most people will either download a new theme, purchase one, or have one custom designed and built. There are hundreds of places where themes can be downloaded for free and/or for a small fee. One of the best places to start looking for themes is in the official WordPress [Themes Directory](#).

Clicking on the *Appearance* menu option will default you at the Themes screen. The theme that is currently active is shown at the top left of the screen. The other themes shown are ones that are installed, but not currently in use. To see a preview of your site in another theme (that isn't currently active), you can click the *Live Preview* button associated with each theme. While the preview screen is displayed, you're able to click your site links to view your various pages in the new theme layout as well as make various theme changes. To change your site to another Theme, hover your cursor over the theme you'd like to activate and click the *Activate* button that appears underneath the Theme. Alternatively, if the preview window is displaying, you can click the *Save & Activate* button in the top left corner of the window to activate the theme.

To view more details about a particular theme, hover your cursor over a theme thumbnail image and click on *Theme Details*. A pop-up window will appear that displays a larger image along with the theme description and other details.

Clicking on the *Add New* button at the top of the page allows you to upload a new theme to your site as well as search the WordPress Themes Directory for new themes and install them directly from within your Dashboard.

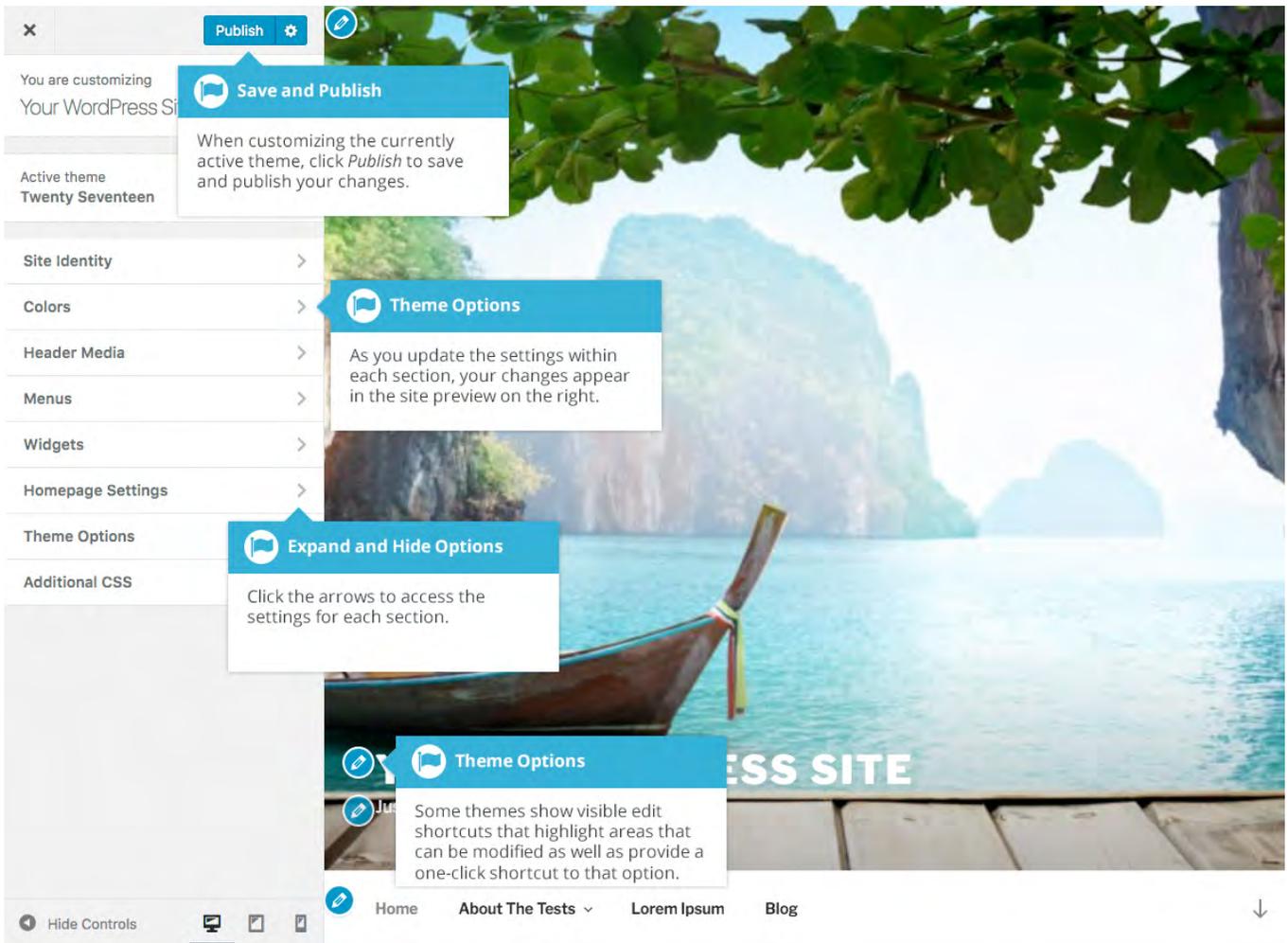


Previewing and Customizing your Theme

As well as the ability to preview a theme, you can also update various theme settings all while previewing the changes live. The options that you can change will be dependent on the individual theme.

For the currently active theme, clicking the *Customize* button allows you to update various settings whilst also previewing those changes. Until you click the *Publish* button, only the theme preview window is updated, not the theme on your live site.

For all other installed themes that are not currently active, click the *Live Preview* button to preview the theme, update its settings and activate the theme. Until you click the *Activate & Publish* button, only the theme preview window is updated, not the theme on your live site.



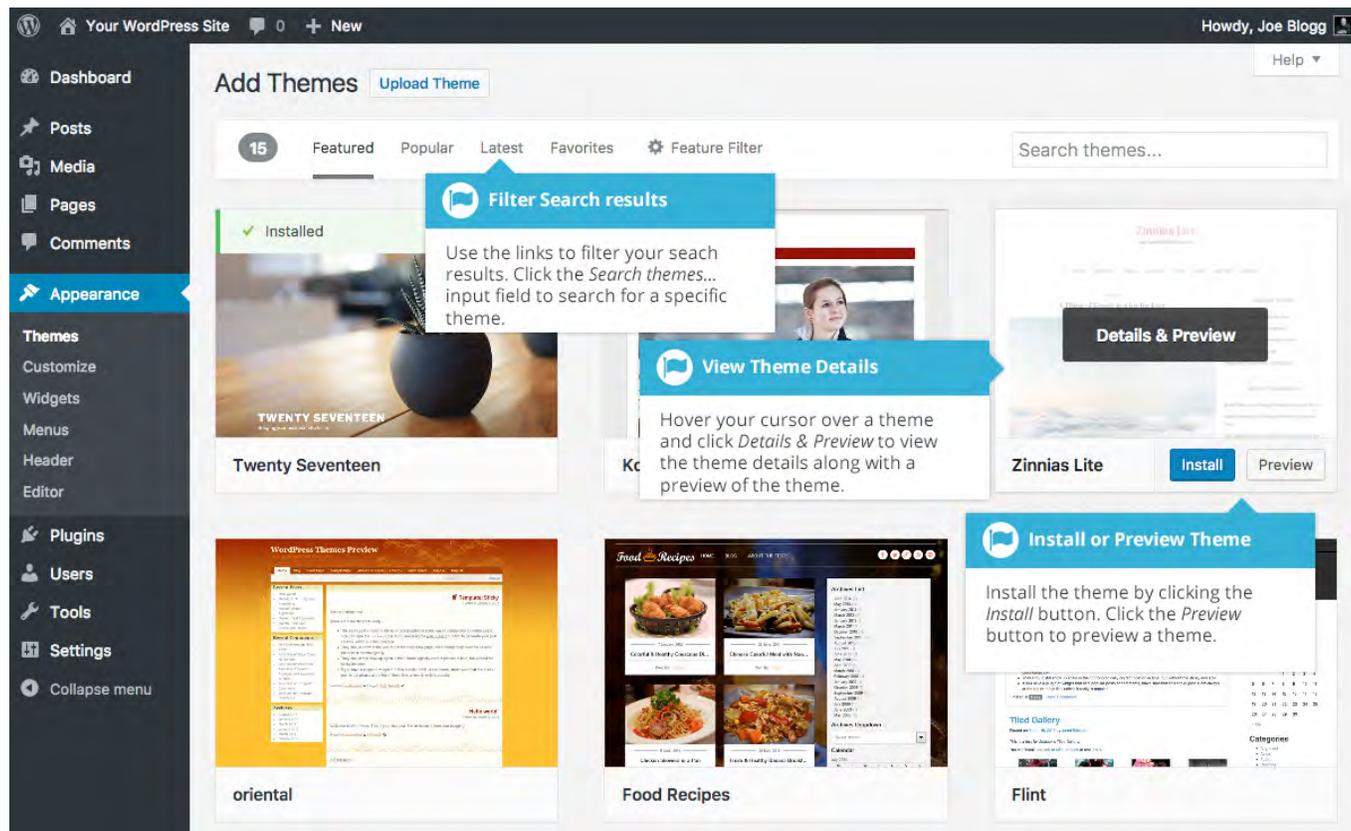
Adding a new Theme

You're able to add new themes to your site right within the WordPress Dashboard. At the top of the *Themes* screen there is an *Add New* button. Click this button to search and add new themes into your site.

After clicking the *Add New* button, you'll be shown the *Add Themes* screen. It should look similar to the screen below. The *Add Themes* screen allows you to search and install themes directly from the official [WordPress Themes Directory](#). By default, the screen will show a list of Featured themes.

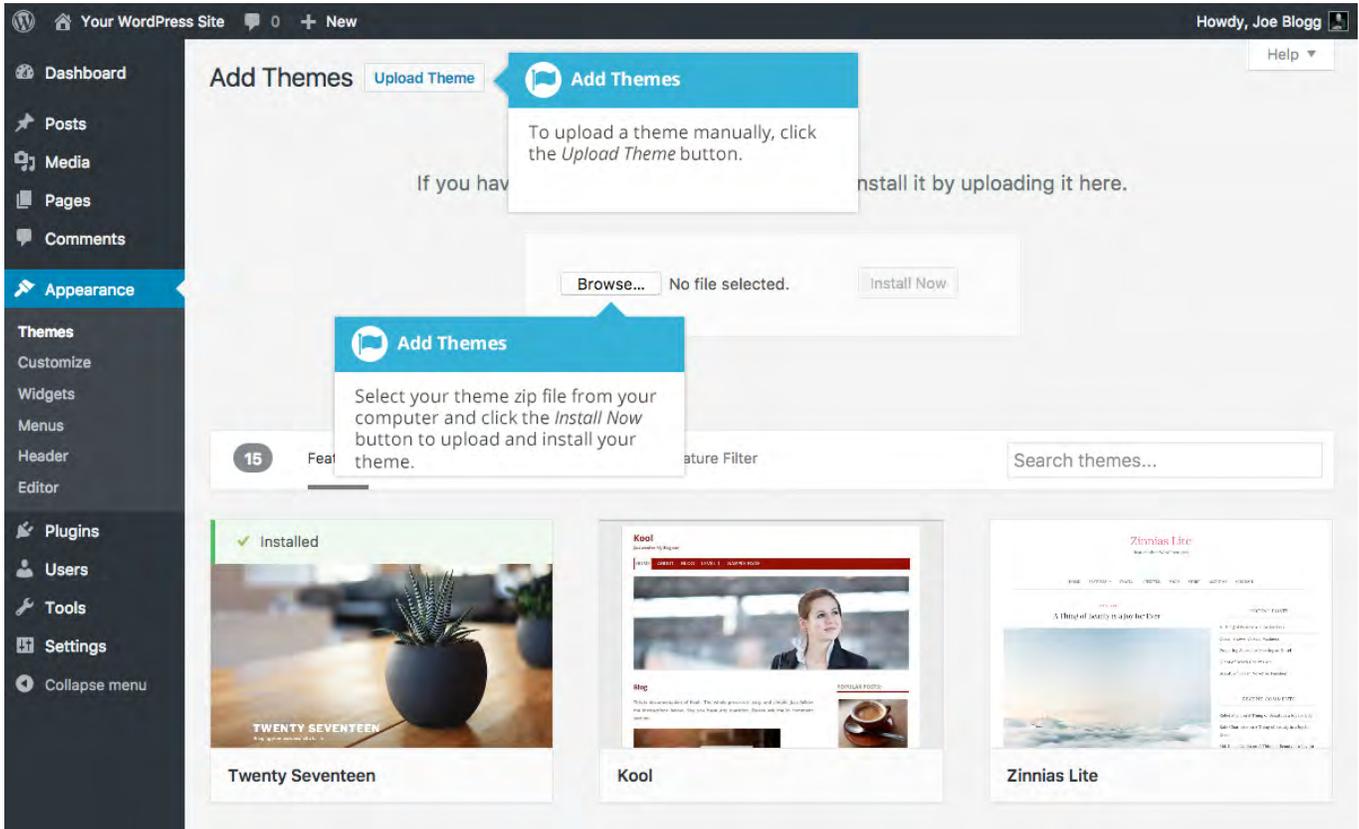
You can use the links at the top of the page to filter the results to see *Featured* themes, *Popular* themes or the *Latest* themes. Click the *Feature Filter* link to filter the results based on the Tags you specify. There are Tags for Layout, Features and Subject.

Alternatively, click the *Search themes...* input field and enter text to search for a specific theme.



Hovering your cursor over each theme thumbnail will display extra buttons. To view the details of a theme along with a preview, click the large *Details & Preview* button or the smaller *Preview* button. Clicking the *Install* button will download and install the theme on your site. After the theme is installed, you will be given the choice to view a *Live Preview*, immediately *Activate* the theme or return to the *Theme Installer*.

On the *Add Themes* page, you also have the option to manually upload a theme to your site. To upload a theme, click the *Upload Theme* button at the top of the page.

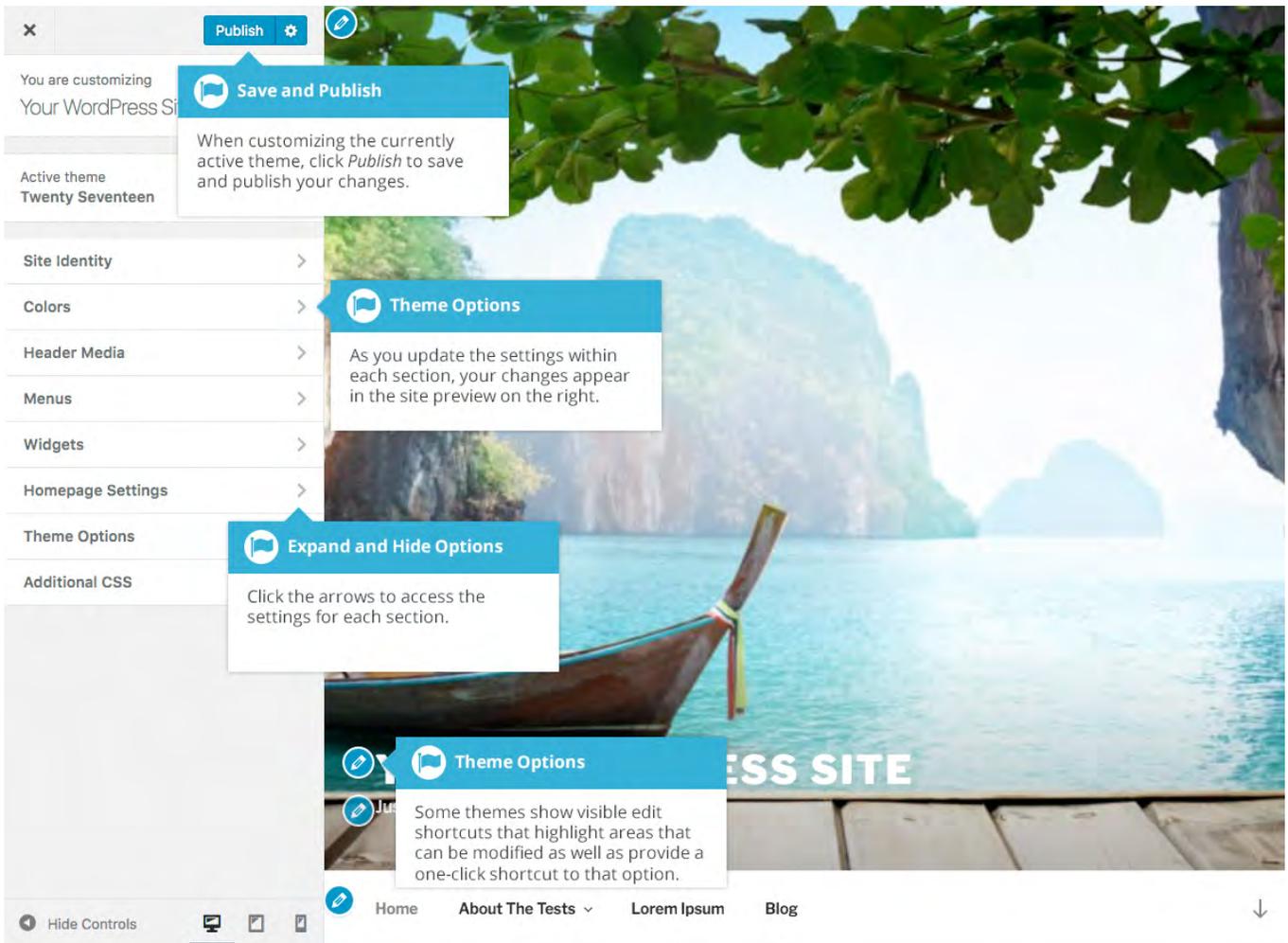


Select your theme file from your computer by clicking the *Browse...* button. Your theme file must be uploaded in .zip format.

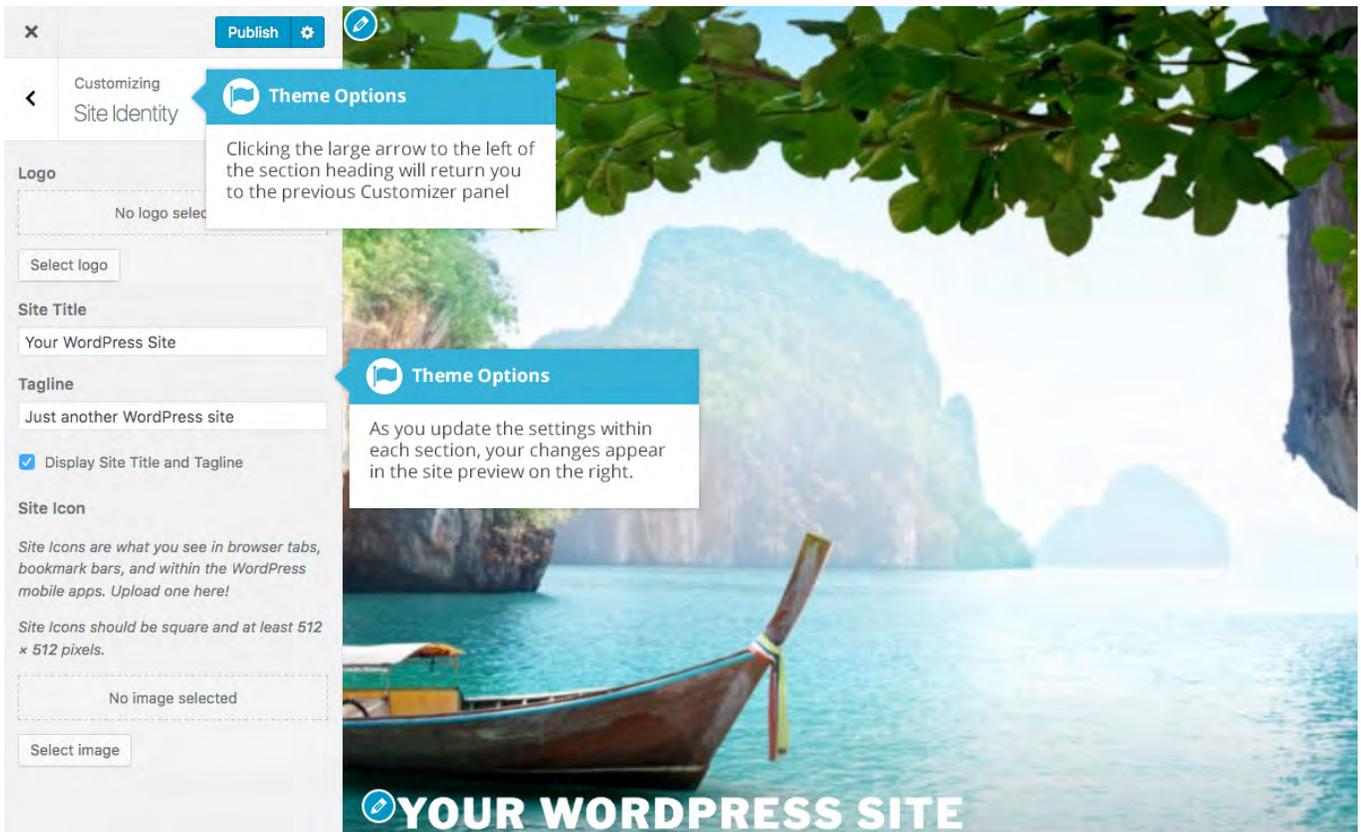
After clicking the *Install Now* button, your theme will be automatically uploaded to your site and installed. You are then given the option to preview the theme, activate the theme or return to the Themes page.

Customizing your Site

Using the Customizer, you can modify certain parts of your website. When you click on the *Customize* menu option you'll be shown the various theme options that you can change. Depending on the theme that is currently in use, you may see more or less options than those displayed in the following image.



Clicking the small arrows will open and close each of the panels, giving you access to each of the various options. You'll find that some of the options in the Customizer are also available via other menu options. As an example, you can change the *Site Title* and *Tagline* within the *Site Identity* panel in the Customizer, as well as by using the *General* option under the *Settings* menu.



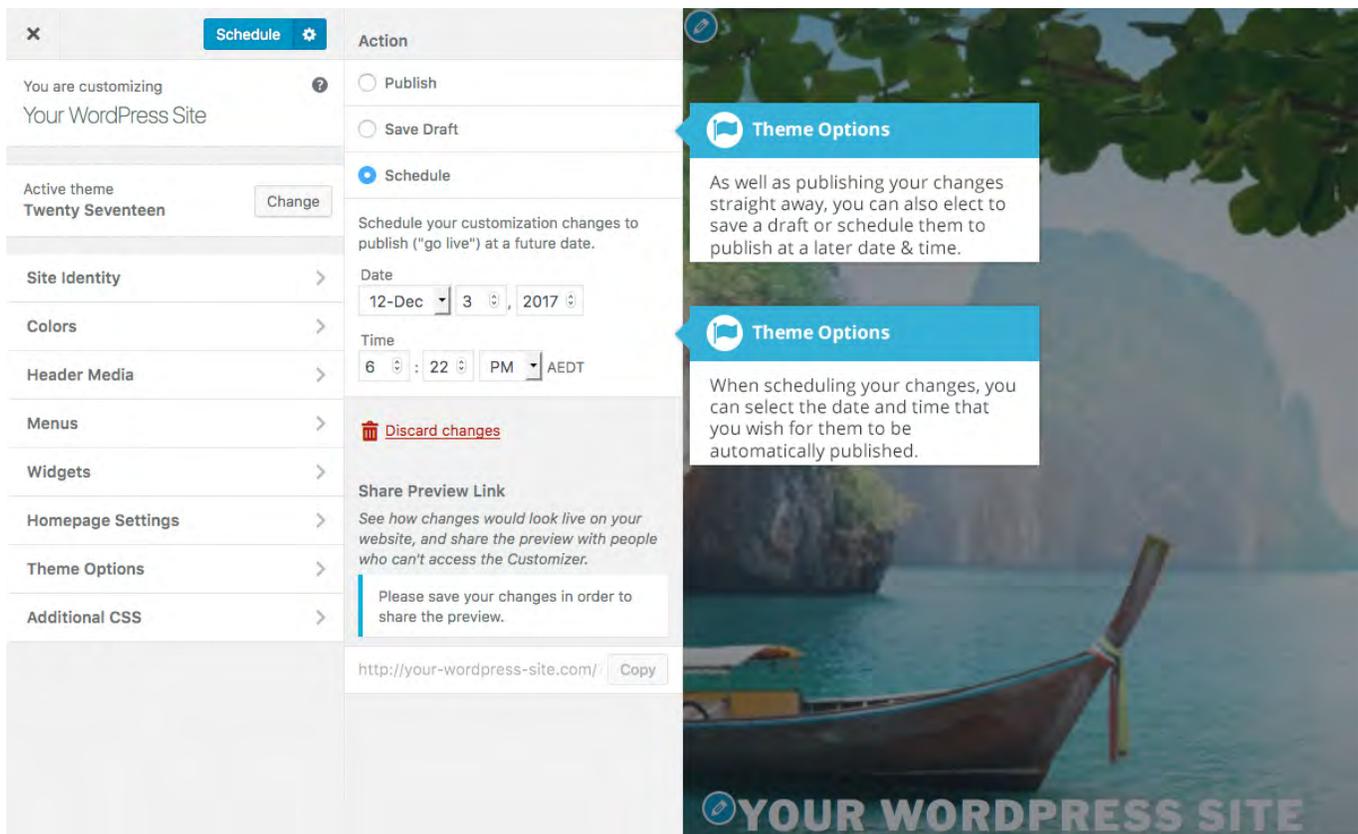
As you make your changes on the left-hand side of the Customize screen, the live preview on the right-hand side is automatically updated. You can also use the live preview window on the right-hand side of the page to navigate around your site.

By default, the Customizer will show your homepage in the preview window. Not all Customizer options affect the homepage though. You'll find that some options in the Customizer may also affect other parts of your site such as your blog, or static Pages. You can browse around your site in the live preview window to view these other pages, just like you would when viewing your site in a separate browser window.

Until you click the *Publish* button, only the theme preview is updated, not the theme on your live site.

By default, your changes are published immediately when you click the *Publish*

button. By clicking on the small cog icon () next to the *Publish* button, you can also elect to save a draft of your changes, or have them automatically published at a later scheduled date and time of your choosing.



To help with testing your site across various devices, the Customizer also allows you to preview your site in mobile, tablet and desktop views. At the bottom of the

Customizer panel, click one of the view icons (  ) to change your site preview so that you can get an idea of how it will display on a regular desktop, a tablet or smartphone device.

Widgets

Widgets are independent sections of content that can be placed into any widgetized area provided by your theme. Although these widgetized areas are commonly called ‘Sidebars’ and are quite often located in the left or right-hand column, they can be also located anywhere within your site and are entirely dependent on the current theme as to their location. Lots of themes use these widgetized sidebars in the footer area.

There are numerous widgets available by default which allow you to add extra content to your site, such as Recent Comments, Categories or Custom Menus, just to name a few. New Widgets can also be installed via plugins and again,

depending what the plugin is used for the extra functionality it brings to your site will vary.

Your WordPress Site 0 + New Howdy, Joe Blog

Screen Options Help

Dashboard Posts Media Pages Comments Appearance Themes Customize Widgets Menus Header Editor Plugins Users Tools Settings Collapse menu

Widgets

Manage widgets

Available Widgets

The *Available Widgets* section contains all the widgets you can choose from.

To activate a widget drag it to the sidebar. To deactivate a widget drag it to the *Inactive Widgets* section.

Available Widgets

- Archives**
A monthly archive of your site's Posts.
- Calendar**
A calendar of your site's Posts.
- Categories**
A list or dropdown menu of categories.
- Custom Menu**
Add a custom menu to your sidebar.
- Meta**
Login, RSS, & WordPress.org links.
- Pages**
A list of your site's Pages.
- Recent Comments**
Your site's most recent comments.
- Recent Posts**
Your site's most recent posts.
- RSS**
Entries from any RSS or Atom feed.
- Search**
A search form for your site.
- Tag Cloud**
A cloud of tags for your site's Posts.

Adding Widgets
Once a widget is added to the sidebar, it will expand to show available options (if any). Click the *Save* button to save your changes.

Deleting Widgets
Click the *Delete* link to delete the widget from the sidebar. Click the *Close* link to close the widget panel.

Adding Widgets
To populate a sidebar, drag & drop a widget to the desired location.

Available Sidebars
These are the available sidebars for the current theme. Click the title bar to expand them.

Inactive Widgets
If you want to remove a widget from a sidebar but keep its settings, drag it to the *Inactive Widgets* section.

Inactive Widgets

Drag widgets here to remove them from the sidebar but keep their settings.

- Recent Posts: Recent posts
- Recent Comments: Recent Comments

Clear Inactive Widgets

This will clear all items from the inactive widgets list. You will not be able to restore any customizations.

Search
Add widgets here to appear in your sidebar.

Recent Posts

Recent Comments

Archives

Categories

Title:

Display as dropdown
 Show post counts
 Show hierarchy

Delete | Close Save

Meta

Footer 1
Add widgets here to appear in your footer.

Footer 2

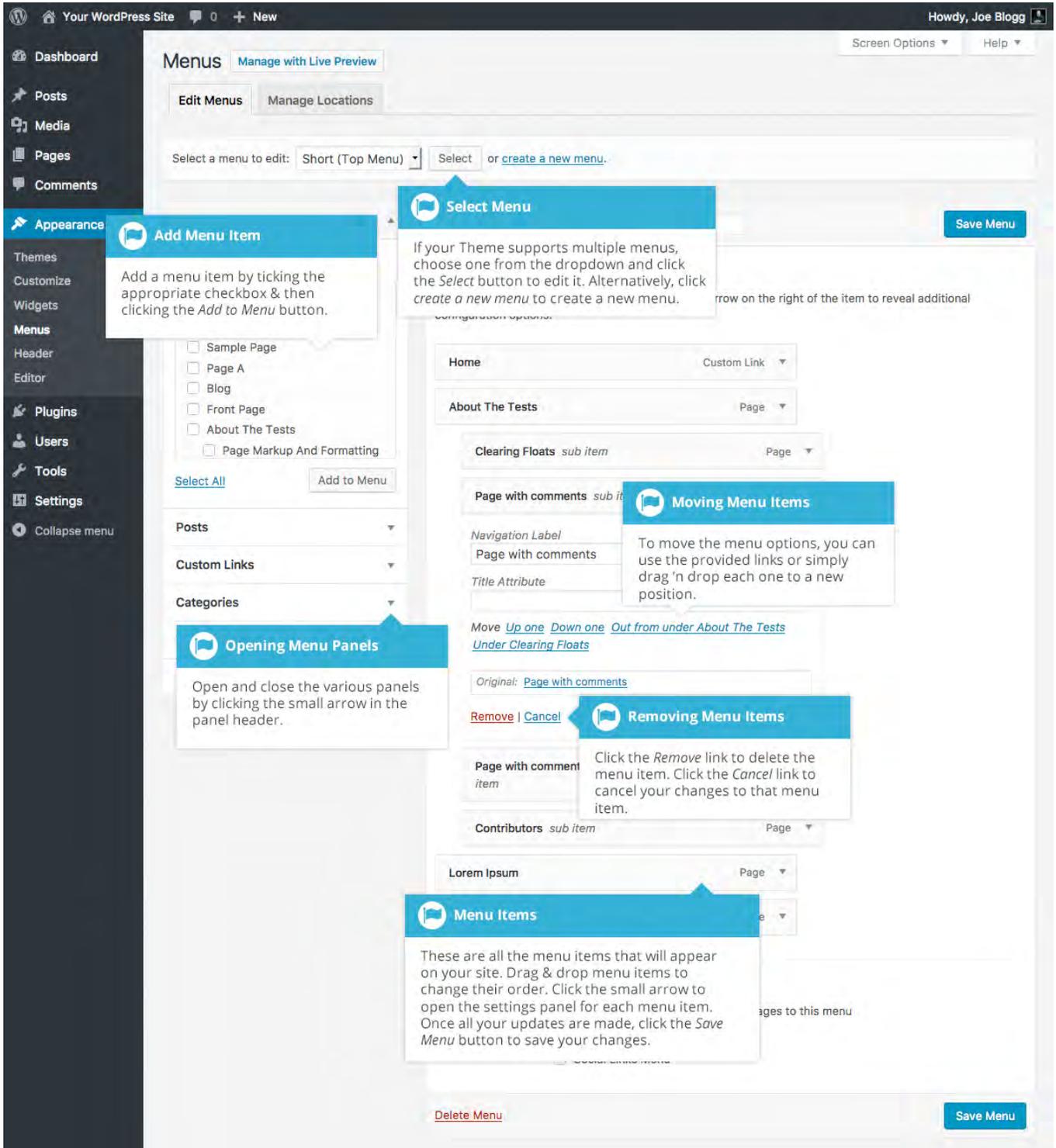
The *Available Widgets* section contains all the widgets you may choose from. To populate one of your Sidebars, drag and drop a widget to the desired location. Once the Widget is dragged to a Sidebar, the widget will open up to allow you to configure its settings. Click the *Save* button within the Widget to save your settings.

If you want to remove a widget from a Sidebar but save its settings for future use, drag it into the *Inactive Widgets* section. If you simply want to delete the Widget from your Sidebar, click the *Delete* link within the Widget.

The small arrow next to the Sidebar title will toggle the sidebar open and closed. If you drag and drop a widget onto a closed sidebar, the sidebar and widget will automatically open.

Updating the Menu

If your theme supports custom menus, you can make modifications to them from the *Menus* option. Menus can contain links to Pages, Posts, Categories, Custom Links or other content types.



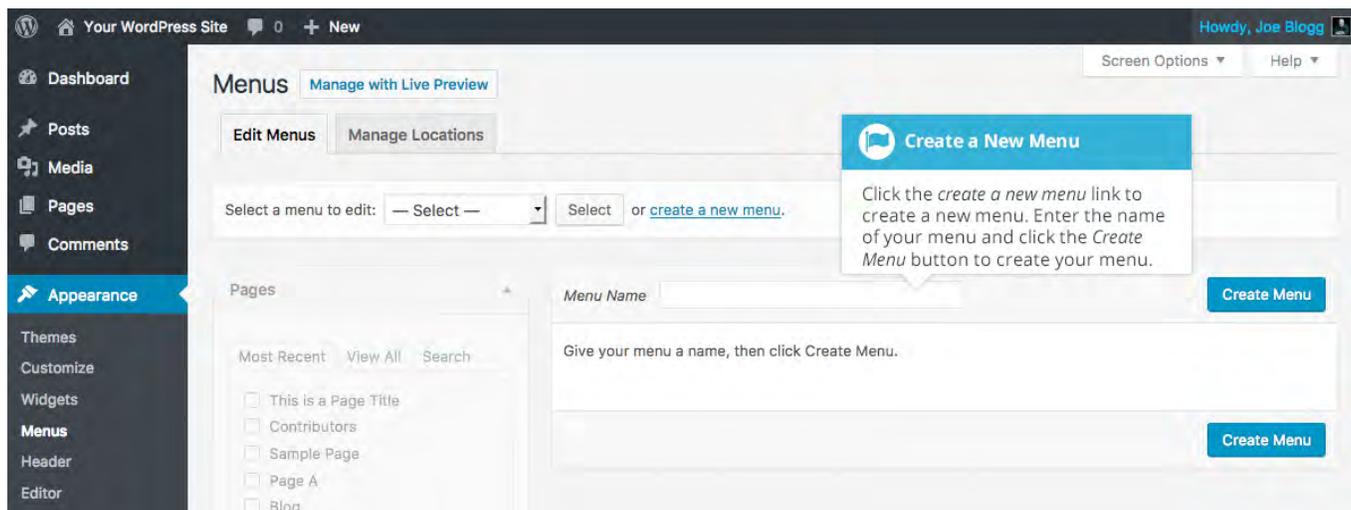
Adding a New Menu

Depending on the current Theme being used, your site may make use of more than one navigation menu. Sometimes you might have multiple menus in your

site header, other times you may even have menus located in the sidebar or footer of your site.

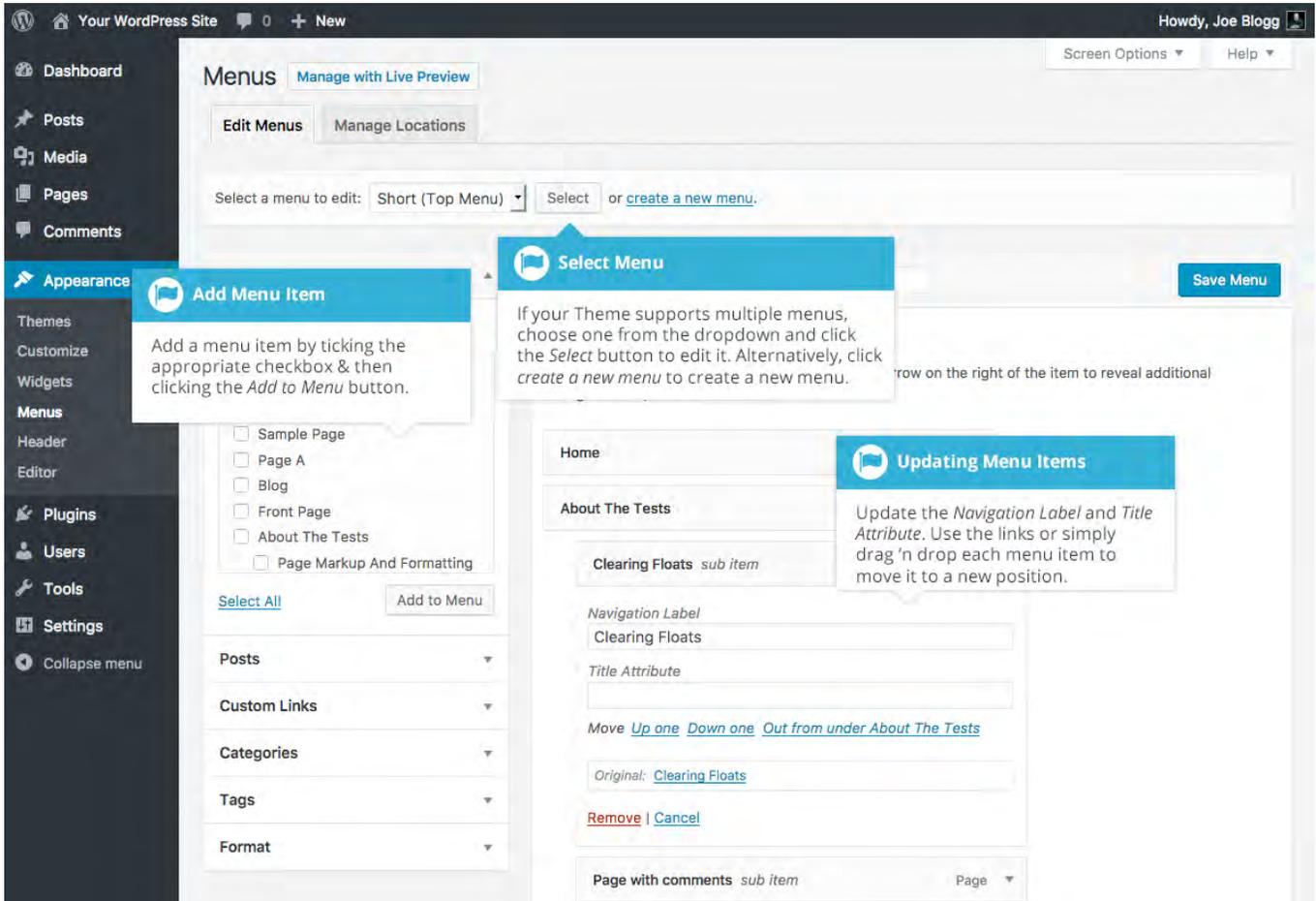
To add a new menu, hover your cursor over the *Appearance* menu option in the left-hand navigation menu and in the fly-out menu, click the *Menus* link. Alternatively, click the *Appearance* menu option and then click the *Menus* link underneath.

On the screen that's displayed, click the *create a new menu* link. You'll be presented with a screen similar to below. Enter a name for your new menu in the *Menu Name* input field. Click the *Create Menu* button to create your new menu.



Editing an Existing Menu Item

Your current list of menu items resides in the right-hand column on the menu screen. If there are multiple menus on your site, there will be a dropdown list displayed at the top of the page that enables you to select the menu that you would like to edit. Simply select the menu you would like to edit from the *Select a menu to edit* dropdown list and then click the *Select* button. The menu items for your selected menu will then be displayed.



The items in this right-hand column on the *Menus* page will match the menu items that appear on your website. Clicking on the down arrow next to each menu item name will show an options panel for that particular menu item. In this options panel, there are several items that can be updated. You can show or hide extra fields such as *Link Target*, *CSS Classes*, *Link Relationship (XFN)* or *Description* using the *Screen Options* tab at the very top-right of the screen.

- **URL** – Only displayed for Custom Links and will contain the URL to navigate to when that menu item is clicked
- **Navigation Label** – This is the label that will display within the actual menu on your website
- **Title Attribute** – This is the tooltip that appears when the mouse cursor hovers over the menu item
- **Open link in a new window/tab** – (Hidden by default) You can set the menu item to open in the same window or tab (which is the default) or in a new

window or tab. This option is made visible by ticking the *Link Target* option on the *Screen Options* panel

- **CSS Classes** – (Hidden by default) Optional CSS Classes to add to this menu item. This option is made visible by ticking the *CSS Classes* option on the *Screen Options* panel
- **Link Relationship (XFN)** – (Hidden by default) Allows for the generation of XFN attributes so you can show how you are related to the authors/owners of site to which you are linking. This option is made visible by ticking the *Link Relationship (XFN)* option on the *Screen Options* panel
- **Description** – (Hidden by default) The description for the link. This may or may not appear, depending on the theme This option is made visible by ticking the *Description* option on the *Screen Options* panel

Each menu item can be moved to a new location in the menu hierarchy by using either the links underneath the *Title Attribute* input field or by clicking on the title area of the menu item and dragging ‘n dropping the menu to new location. If you choose to drag ‘n drop your menu items, the cursor will turn into a four-pointed arrow when you’re hovering over the correct area.

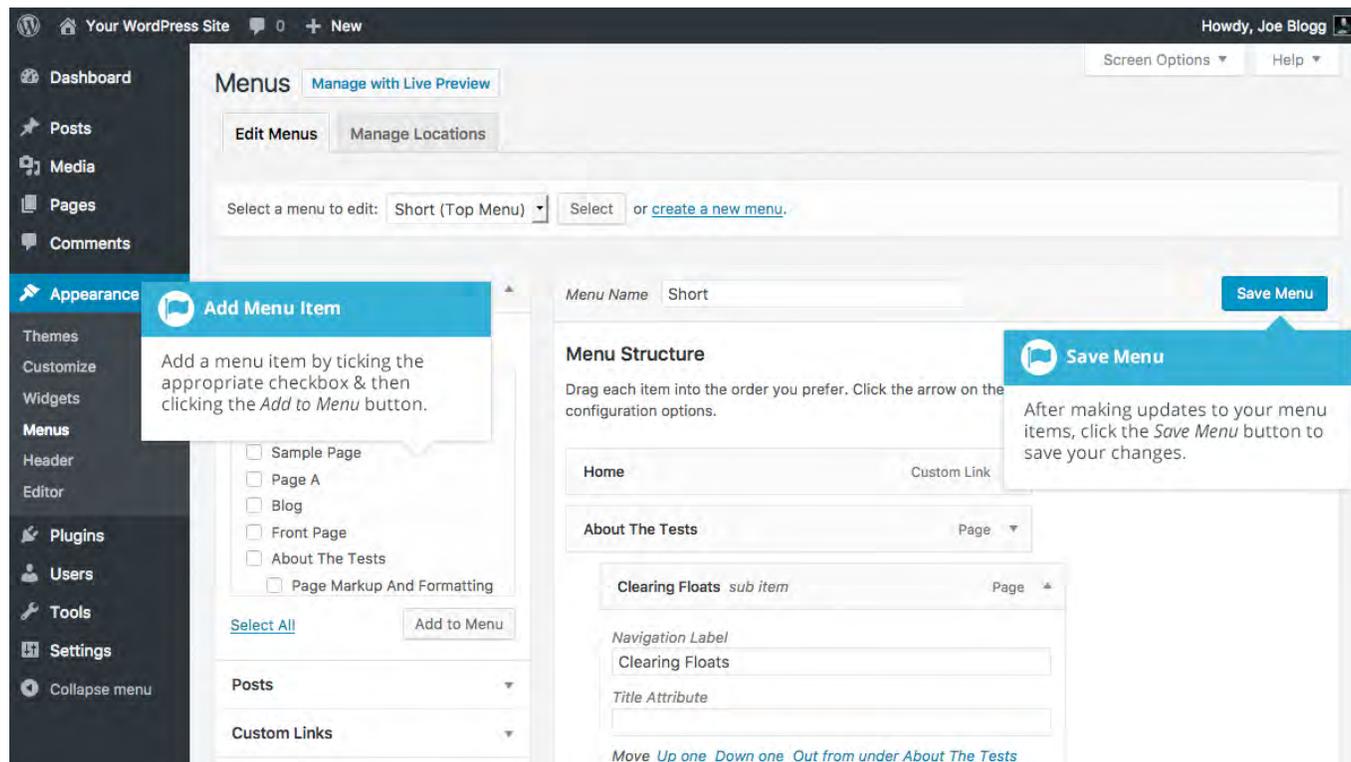
After making updates to your menu items, click the *Save Menu* button at the top or bottom of the screen.

Adding a New Menu Item

By default, only the Pages, Custom Links and Categories panels are shown. If you’d like to add Posts, Tags or Post Formats as menu items, you simply use the *Screen Options* tab at the top-right of the screen to enable these panels as well.

To add a new Page as a menu item, tick the checkboxes in the *Pages* panel, next to each of the Pages that you’d like to add. You can select one Page at a time or multiple. After selecting your Pages, click the *Add to Menu* button. The new menu items will append to the bottom of the current list of menu items. The menu item name will default to the Page name. To change this, simply click on the down arrow next to the menu item name to view the options panel and then update the *Navigation Label* to your preferred name. After making your updates, click the

Save Menu button at the top or bottom of the screen. The steps to add a Post, Post Format, Category or Tag as a menu item are exactly the same as adding a Page.

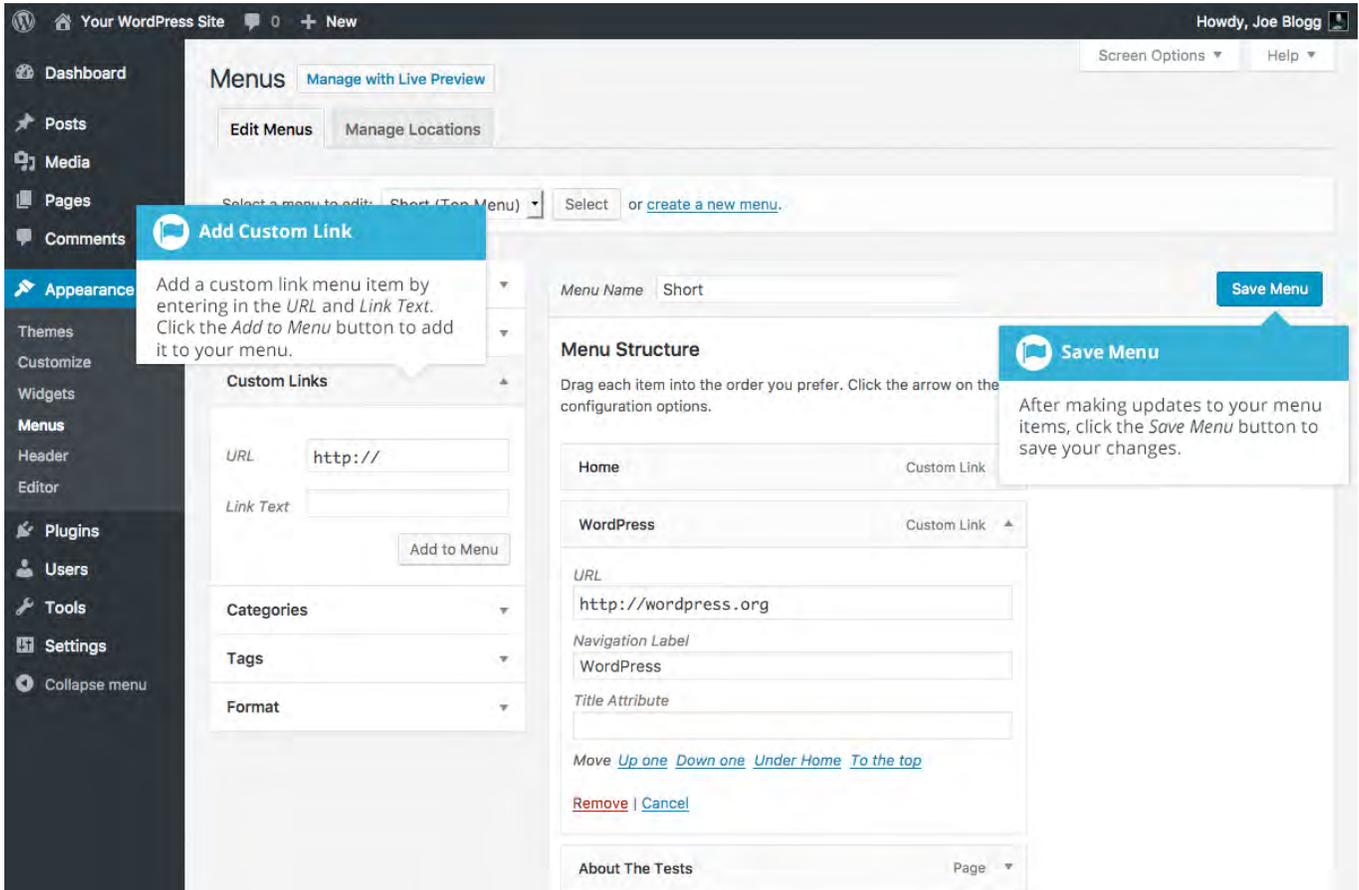


To change the order that the menu options appear in, simply place your cursor over the title area of the menu item you'd like to move. When the cursor changes to a four-pointed arrow, click and drag the menu item to its new location.

Depending on how your menu is configured within your theme, it's even possible to create the multi-level hierarchy required for dropdown menus. After moving your menu items around, don't forget to click the *Save Menu* button at the top or bottom of the screen to save your changes.

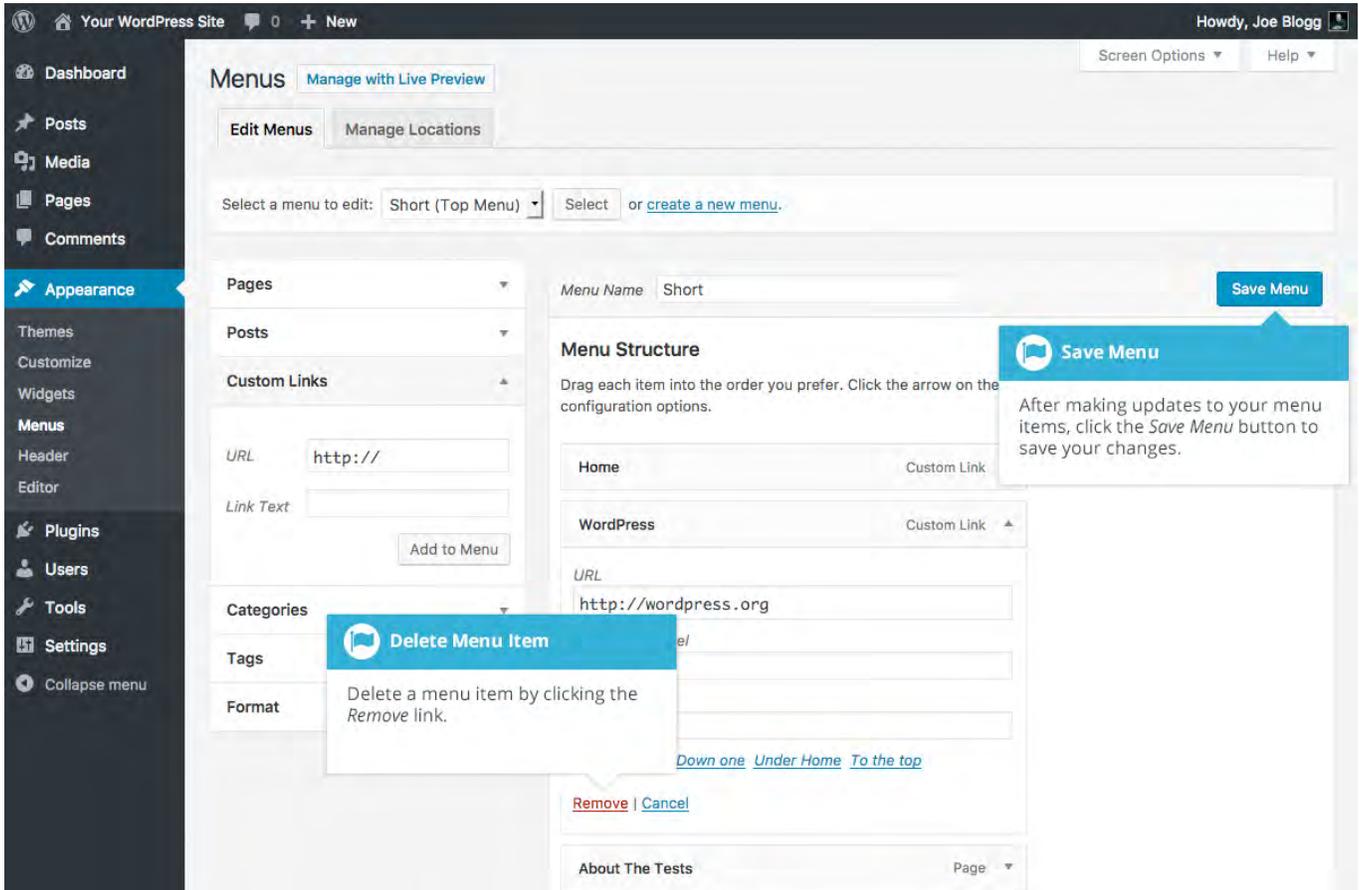
Adding a Custom Link Menu Item

Use the *Custom Links* panel to add a custom link to your menu, such as a link to an external website. Simply type in the website URL in the *URL* field and the menu name in the *Link Text* field. Click the *Add to Menu* button when done. Use the same steps outlined previously to adjust the order of the menu item and click the *Save Menu* button at the top or bottom of the screen to save your changes.



Deleting a Menu Item

To delete a menu item click on the down arrow next to the menu item name to view the options panel for that item and then click the *Remove* link. After making your updates, click the *Save Menu* button at the top or bottom of the screen.



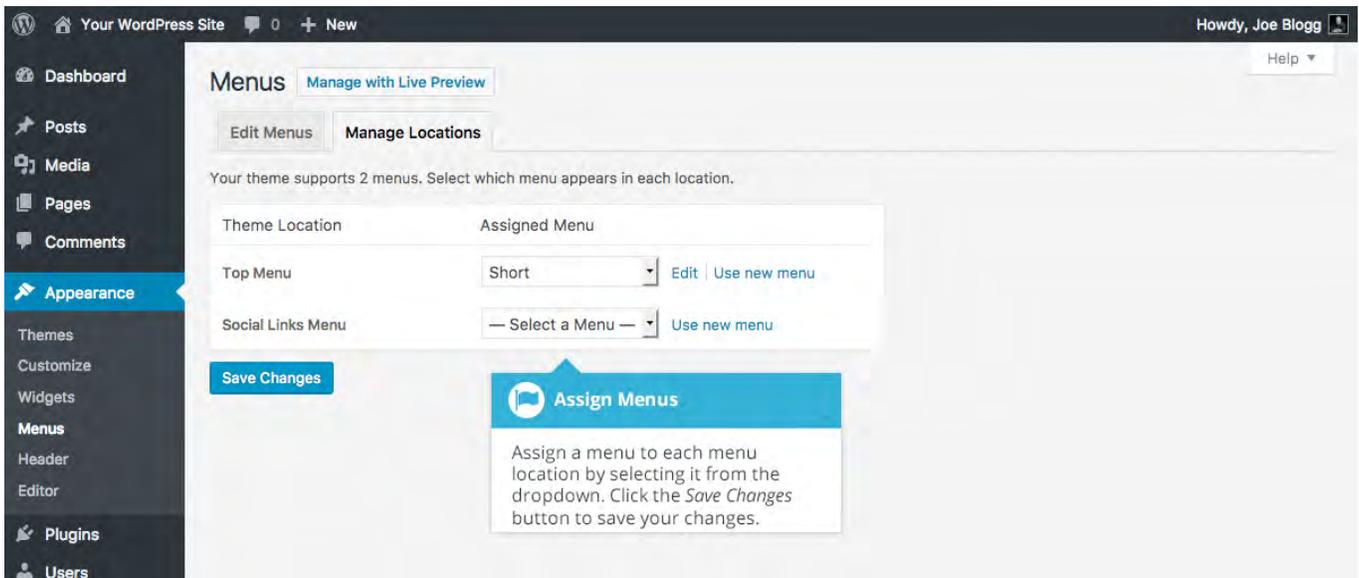
Managing Menu Locations

After you create a menu, you also need to tell WordPress where to use it. This is where the *Manage Locations* tab on the *Menus* page comes in.

After clicking the *Manage Locations* tab on the *Menus* page, you will be shown a page similar to below, with a list of the various menu locations used in your Theme. You may have one menu location or you may have multiple, depending on the Theme currently in use. Your menu location won't necessarily be called 'Primary Menu' either, as shown below. Again, that will depend entirely on your Theme.

Assign an existing menu that you've created to the appropriate location by selecting it from the dropdown list. Click the *Save Changes* button to save your changes.

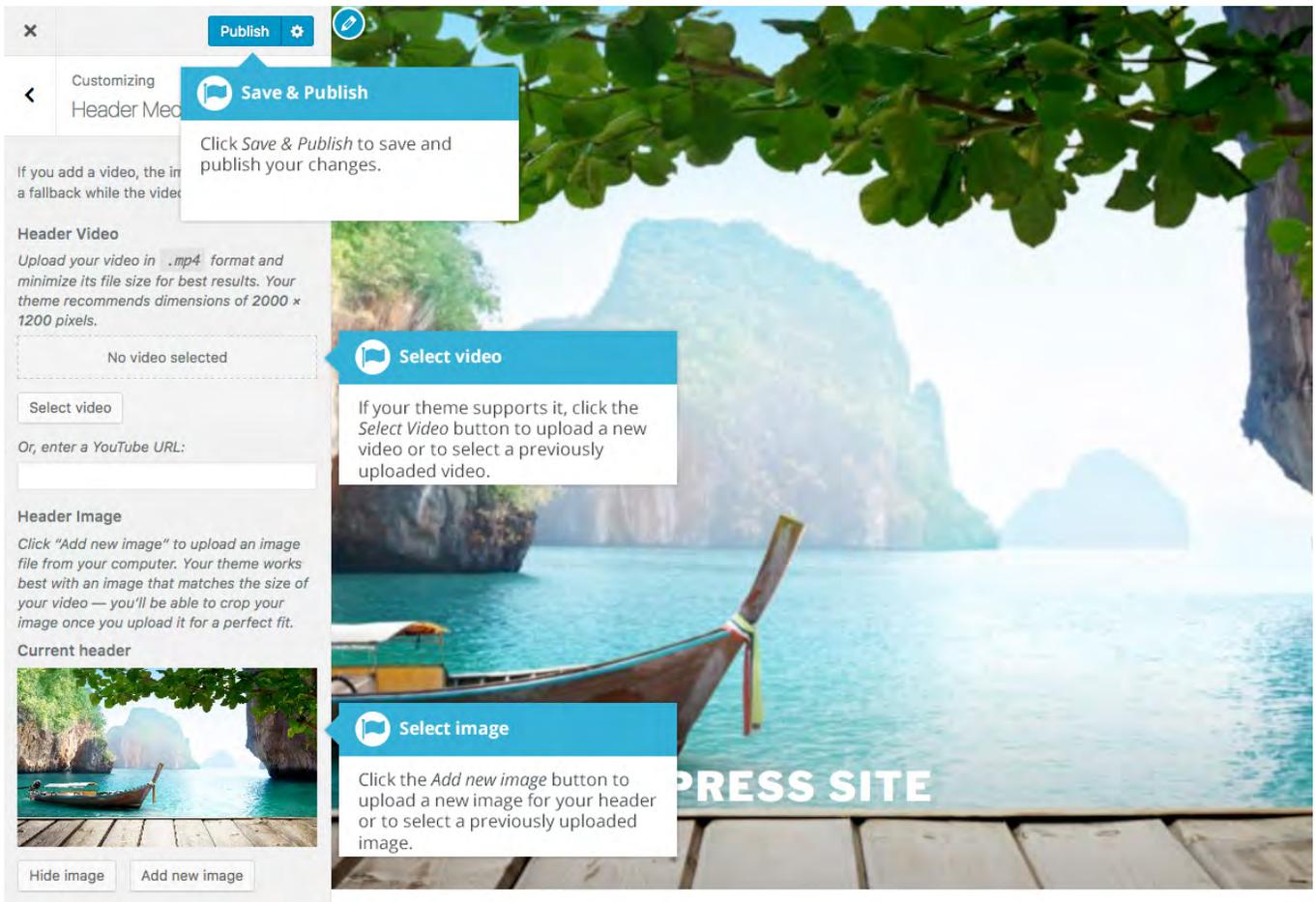
Alternatively, you can choose to create a new menu and automatically assign it to the location by clicking the *Use new menu* link.



Header

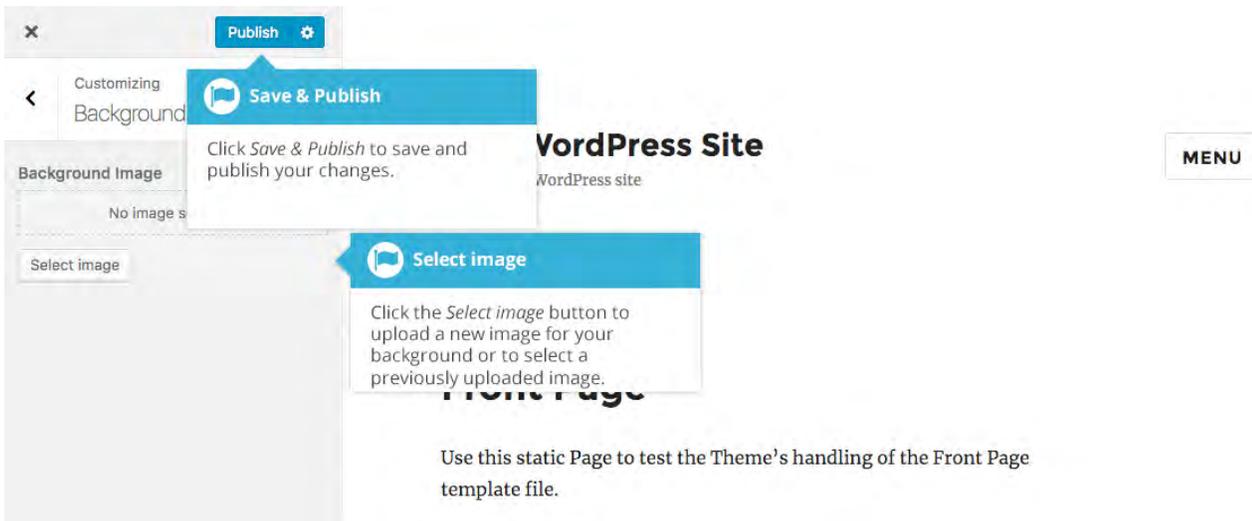
The *Header* menu option will only be available if your current Theme is making use of this option. It allows you to choose an image (or if your theme supports it, a video) to display in the header area of your site. Clicking the *Header* menu option will take you to the *Header Media* panel in the Customizer. In the default Twenty Seventeen theme, the Customizer panel is called *Header Media* as it supports both images and video. In other themes it may be called *Header Image* if the theme doesn't support video headers.

You can select one of your previously uploaded images or you can upload a new image by clicking the *Add new image* button. If you're using the Twenty Seventeen theme, the header also supports video so you can select one of your previously uploaded videos or you can also choose to upload a new video by clicking the *Select Video* button. If you have videos that you've previously uploaded to YouTube, you can also enter a YouTube URL in the appropriate field. To save your changes, click the *Save & Publish* button at the top of the page. Again, depending on the theme you're using you may or may not have this *Header* option.



Background

The *Background* menu option is another theme specific menu. It allows you to choose a background image for your site. Clicking the *Background* menu option will take you to the *Background Image* panel in the Customizer. You can select one of your previously uploaded images or you can upload a new image by clicking the *Select Image* button. To save your changes, click the *Save & Publish* button at the top of the page. Again, depending on the theme you're currently using you may or may not have this *Background* option.



Editor

The Editor menu allows you to edit the individual [CSS](#) and [PHP](#) files which make up your Theme. Normally once a theme is installed and configured on your site, there's no need to make any changes within here. Extreme care should be taken with this option to avoid making changes to files that will affect how your site is displayed. Incorrectly modifying any files within this section can cause your site to display incorrectly or at worst, not at all. Extra caution must be taken if you intend to make any changes here.



It cannot be stressed enough how dangerous this option is if you know nothing about HTML, CSS or PHP. Modifying your theme files can drastically change how your site displays and depending on what gets changed, can even stop your site from displaying altogether.

Plugins

Plugins extend and expand the functionality of WordPress. Once a plugin is installed, you may activate it or deactivate it here. There are thousands of plugins available that provide a huge range of functionality. The easiest place to find them is within the official WordPress [Plugin Directory](#). You can search and install new plugins by clicking on the *Add New* button at the top of the page or the *Add New* link in the left-hand navigation menu.

Once a plugin has been added to your site, it needs to be ‘turned on’. To do this, click the *Activate* link to activate it. Depending on the plugin, you might also find that there are settings that need to be configured.

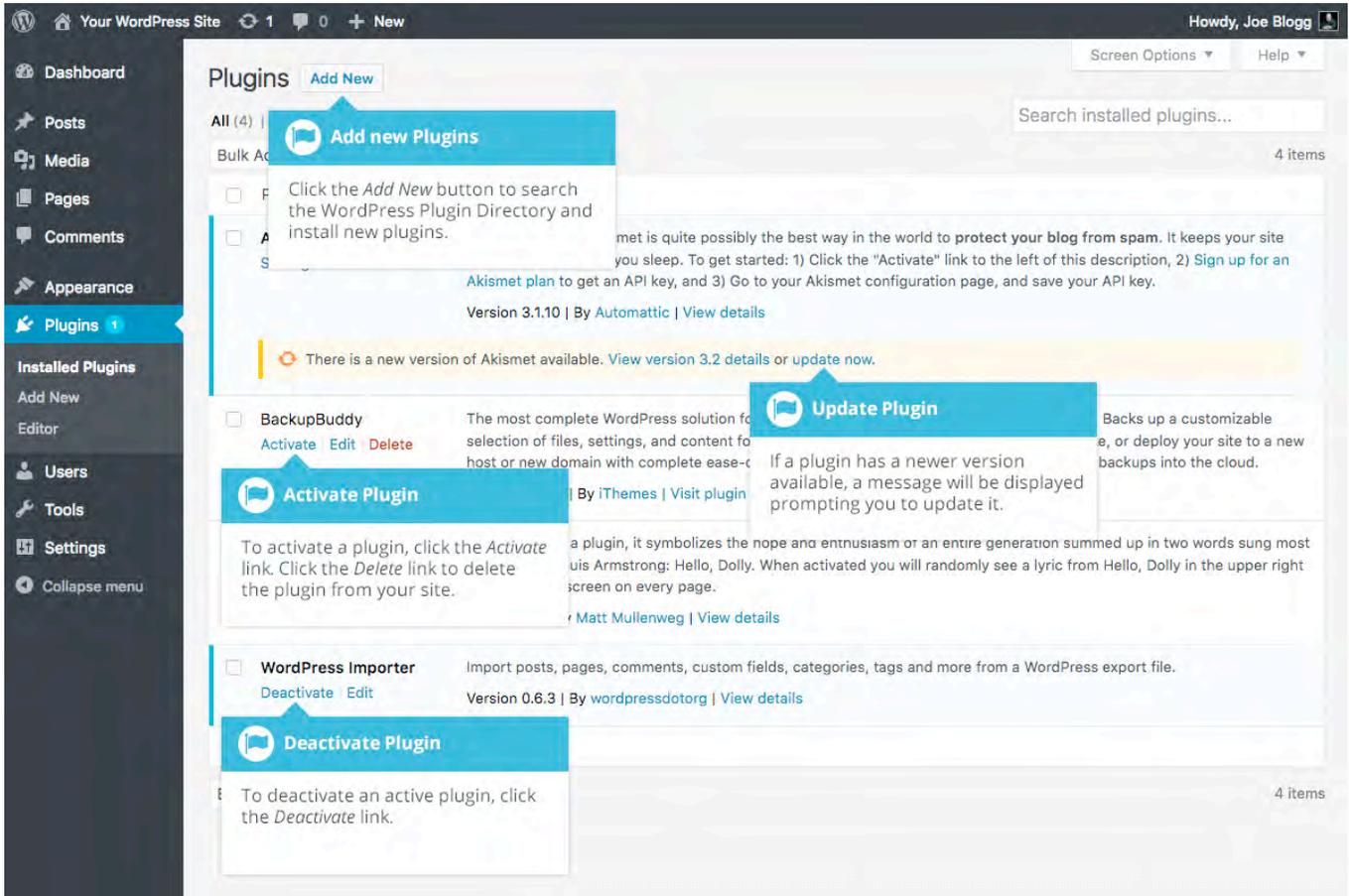
Activated plugins will be displayed with a different coloured background within your list of plugins. They will also be highlighted with a blue vertical bar down the left side of the row.

If any of your installed plugins have available updates, a small number will appear next to the *Plugins* menu option. The number will advise you as to how many plugins have updates available. A message will also be displayed just below the plugin name and description, advising that it has an update, along with a link that allows you to view the details for the new version and another link for updating the plugin.

Prior to updating a plugin, it’s wise to verify that the plugin functionality hasn’t changed significantly as to adversely affect your site. It’s also recommended to check that the plugin and your site still works as expected, once it has been updated.

When you click the *update now* link just below the plugin description, the plugin will automatically update whilst you remain on the *Plugins* page. You will be notified when the plugin has completed updating.

If you have plugins that have been deactivated because you’re no longer using them, it’s good practice to remove them from your site. You can do this by clicking the *Delete* link underneath the plugin name.

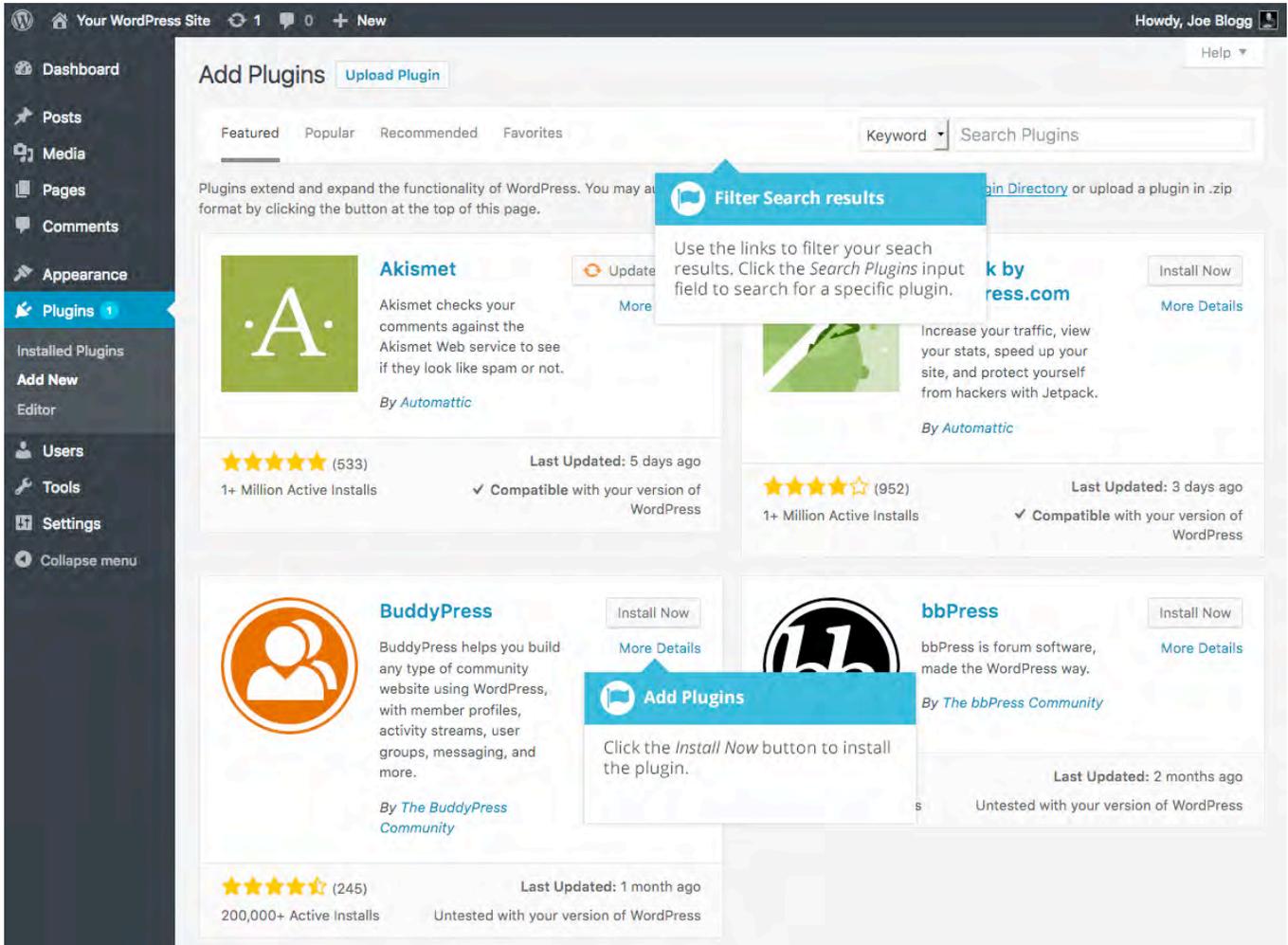


Adding a New Plugin

To add a new plugin, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

The *Add Plugins* page will display a list of the current featured plugins from the WordPress.org Plugin Directory. You can use the links at the top of the page to filter the results to see Featured plugins, Popular plugins, Recommended plugins or a list of the plugins that you've marked as 'Favorite' within the WordPress.org Plugin Directory. If you click the *Favorites* link, you'll need to enter in your WordPress.org username and then click the *Get Favorites* button so that it can retrieve your list.

You can also click the *Search Plugins* input field and enter text to search for a specific plugin.

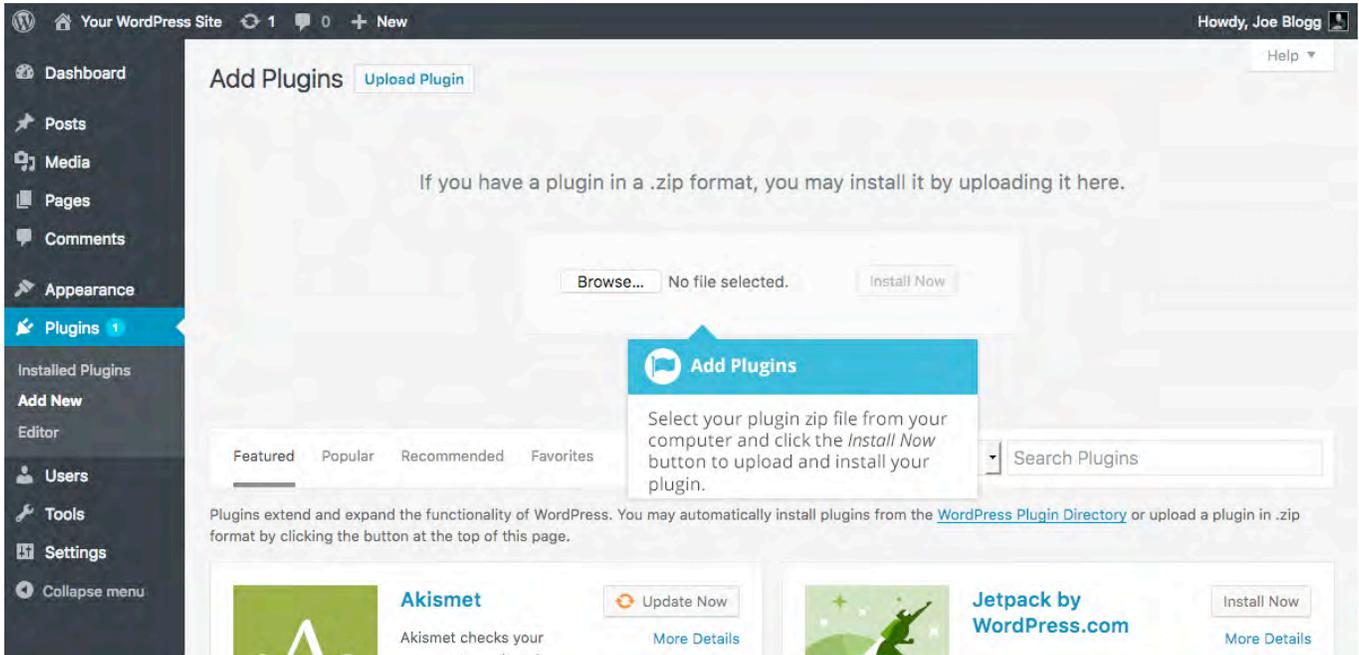


To view more information about a particular plugin, click the thumbnail image, the plugin name or the *More Details* link. A pop-up window will display more information about the plugin such as the plugin *Version*, *Author* and the date it was *Last Updated*. You can also read the full plugin description, installation notes, view screenshots and read any reviews that have been left.

The screenshot shows the WordPress Admin interface with the Akismet plugin page open. The left sidebar contains navigation options: Dashboard, Posts, Media, Pages, Comments, Appearance, Plugins (selected), Installed Plugins, Add New, Editor, Users, Tools, Settings, and Collapse menu. The main content area features a green header with a diagram illustrating the Akismet process in three steps: 1. Visitors submit comments on your blog. 2. Your blog runs each comment through Akismet. 3. Akismet tells your blog whether it's ham or spam. Below the diagram is the Akismet logo and a description: "Akismet checks your comments against the Akismet Web service to see if they look like spam or not and lets you review the spam it catches under your blog's 'Comments' admin screen." Major features are listed in a bulleted format: automatically checks all comments and filters out spam; status history for comments; URL visibility in comment bodies; moderator visibility of approved comments; and a discard feature for spam. A sidebar on the right provides technical details: Version: 3.2, Author: Automattic, Last Updated: 5 days ago, Requires WordPress Version: 3.7 or higher, Compatible up to: 4.6.1, Active Installs: 1+ Million, and an average rating of 5 stars based on 533 ratings. An "Install Update Now" button is visible at the bottom of the sidebar. A tooltip for the "Add Plugins" button is also present, stating: "Review important information about the plugin such as the Version, Author and the date it was Last Updated."

After clicking the *Install Now* button, the plugin will be automatically downloaded to your site and installed. You are then given the option to activate the plugin or return to the plugin installer page.

On the *Add Plugins* page, you also have the option to manually upload a plugin to your site. To upload a plugin, click the *Upload Plugin* button at the top of the page.



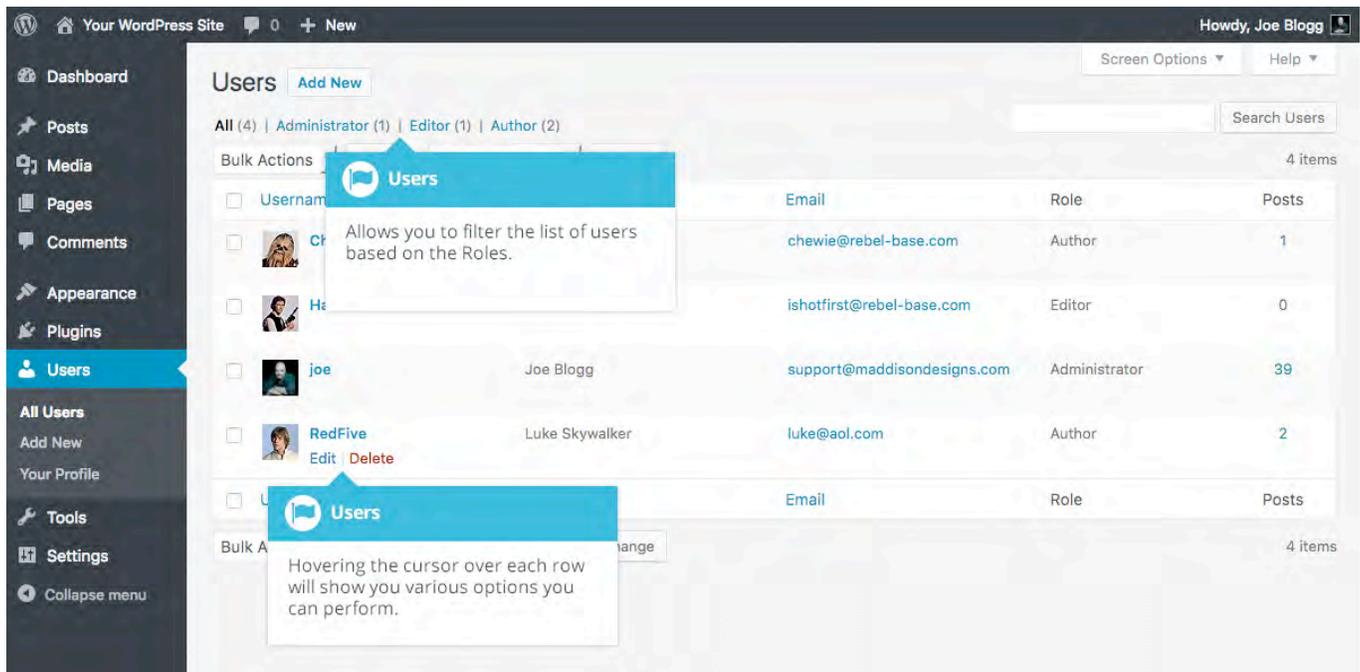
Select your plugin file from your computer by clicking the *Browse...* button. Your plugin file must be uploaded in .zip format.

After clicking the *Install Now* button, your plugin will be automatically uploaded to your site and installed. You are then given the option to activate the plugin or return to the plugins page.

Users

This screen lists all the existing users for your site. Users with roles other than Administrator will see fewer options when they are logged in. Depending on your Role, you can also add new users as well as manage their Roles.

At the top of the screen there are links that allow you to filter the list of Users based on the User Roles. The number in brackets will advise how many there are for that particular type.



When hovering your cursor over each row in the list of Users, links will appear beneath the user name.

- **Edit** – Allows you to edit the user profile
- **Delete** – Allows the User to be deleted. This link won't be available for your own profile

A User can have one of five defined roles as set by the site admin: Site Administrator, Editor, Author, Contributor, or Subscriber.

- **Super Admin** – (Only relevant when running multiple sites from one WordPress installation). Someone with access to the blog network administration features controlling the entire network

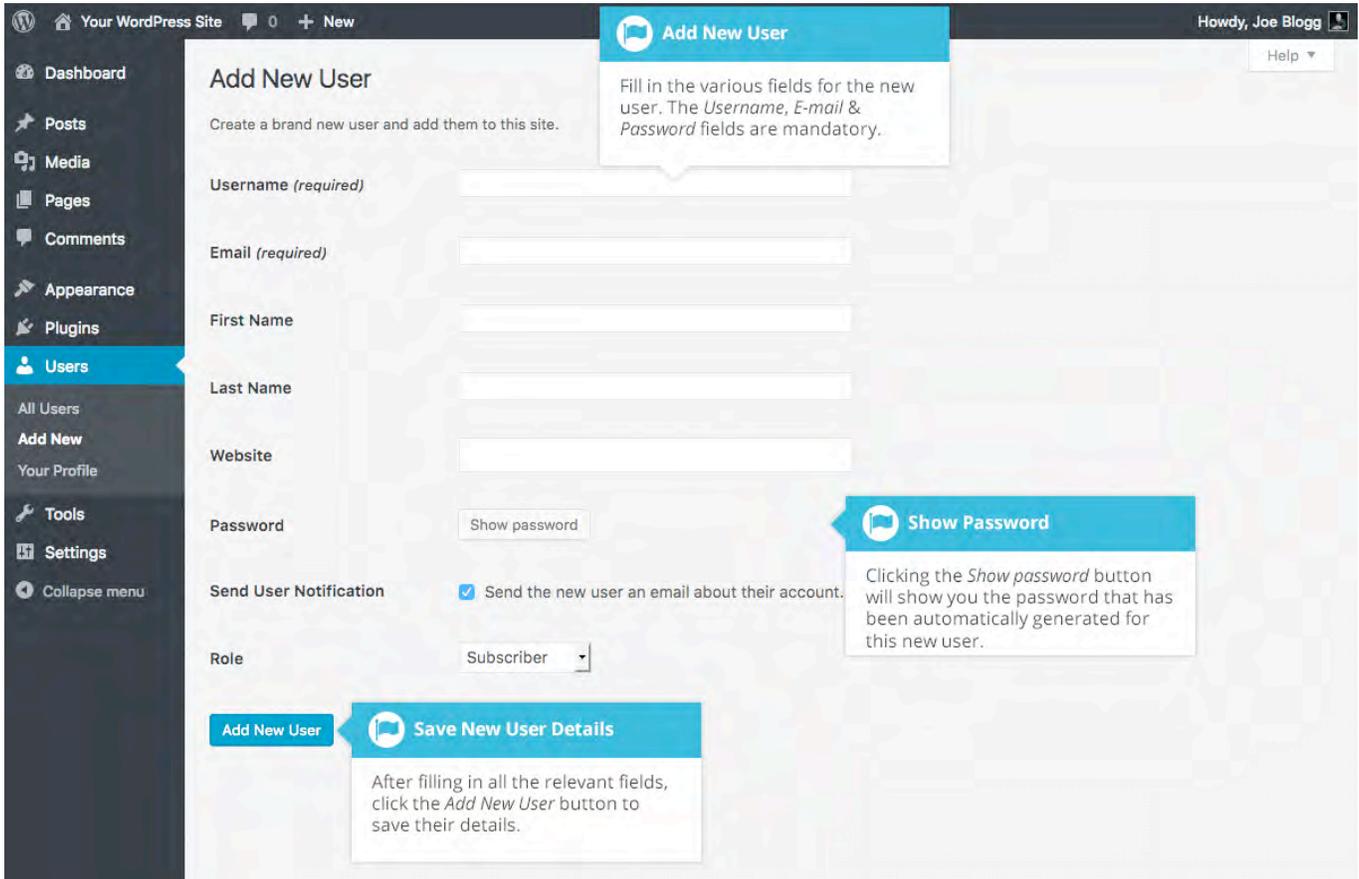
- **Administrator** – Somebody who has access to all the administration features
- **Editor** – Somebody who can publish and manage posts and pages as well as manage other users' posts, etc.
- **Author** – Somebody who can publish and manage their own posts
- **Contributor** – Somebody who can write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

When WordPress is first installed, an Administrator account with all capabilities is automatically created.

The [avatar](#) that is displayed in the list of Users is using what's called a Gravatar. A Gravatar is a Globally Recognized Avatar. Gravatars are currently used by a huge number of blogs, forums, chat sites and the like. Rather than having to upload an avatar on each and every system you sign up to, Gravatars allow you to have one avatar that is viewable everywhere. To create a Gravatar, simply go to gravatar.com and sign up. To use your Gravatar within WordPress, simply add an email address to your Profile that you've configured within the Gravatar site and it will automatically display.

Adding a New User

To add a new user, click on the *Add New* link in the left-hand navigation menu or the *Add New* button at the top of the page.

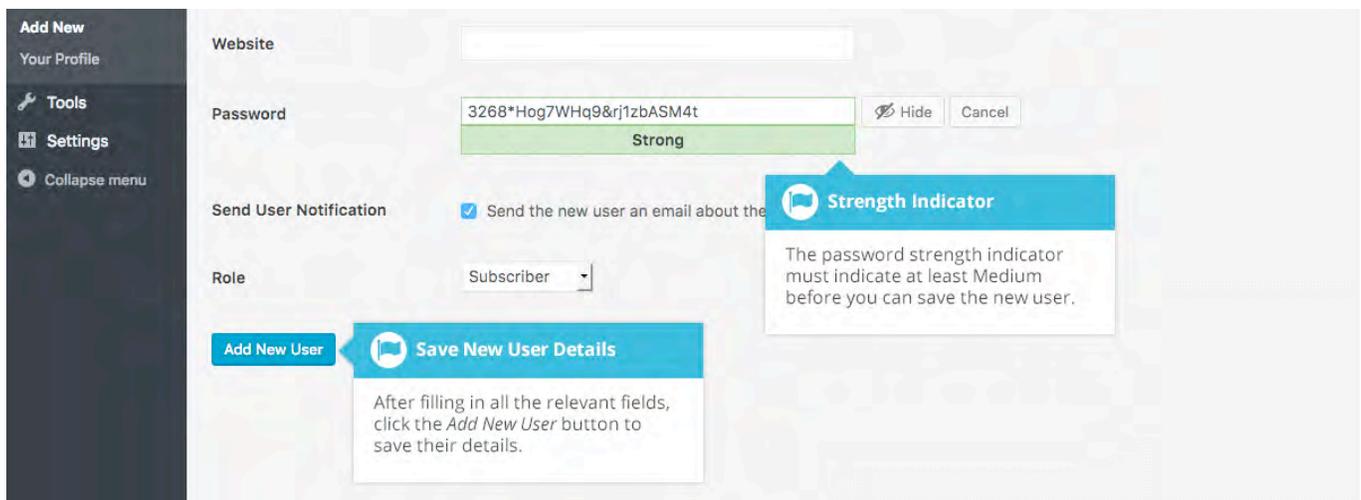


Once the above page is displayed, simply fill in the various fields and click the *Add New User* button.

- **Username** – (mandatory) Enter the username of the new user here. This will also be used as the Login name for the user. Once saved, the Username can't be changed
- **E-mail** – (mandatory) Enter a valid email address of the new user here. The email address must be unique for each user. If a published Post or Page is authored by this user and approved comments are made to that post or page, a notification email is sent to this email address
- **First Name** - Enter the first name of the new user here
- **Last Name** – Enter the last name of the new user in this text box
- **Website** – You may enter the new user's website URL in this text box
- **Password** – Clicking the *Show password* button will show you the password that has automatically been generated for the new user

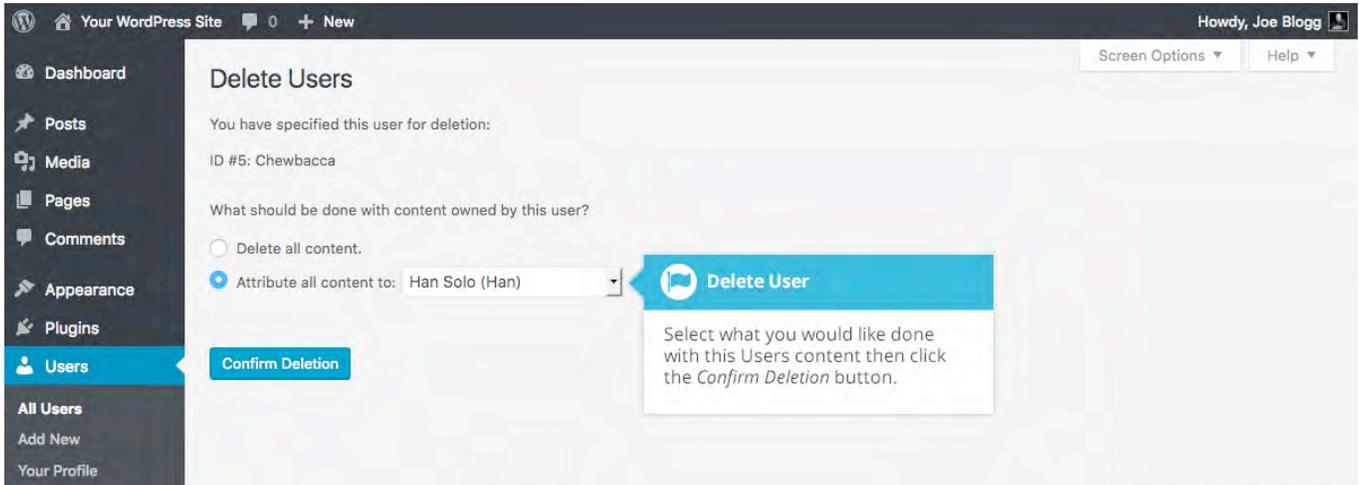
- **Send User Notification** – When ticked, WordPress will send your new user an email about their account
- **Role** – Select the desired Role for this user from the dropdown list

WordPress will automatically generate a strong password when you create a new user. Clicking the *Show password* button will display the password that was generated and if you want, will also allow you to change it. The password strength indicator, shown just below the password field, must indicate at least Medium before WordPress will allow you to save the new user. It goes without saying, the stronger the password the more secure the login so it's advisable that the strength indicator shows your password as being Strong. To make a password stronger, use upper and lower case letters, numbers and symbols like ! " ? \$ % ^ &).



Deleting a User

To delete a user, click on the *Delete* link that appears beneath the user name when hovering your cursor over each row. The *Delete* link won't appear for the user that is currently logged in.



Along with deleting the user you will be given the choice of what to do with all the content currently assigned to that User. The available choices are:

- **Delete all content** – This will delete all the content which this user created
- **Attribute all content to** – This will assign all the content currently linked to this User, to another User of your choosing. Simply select the User from the dropdown list

After making your selection, click the *Confirm Deletion* button to remove the User.

Editing your Profile

To edit your profile details, simply click on your user name, when viewing the list of Users or click on the *Edit* link that appears beneath your user name when hovering your cursor over each row. Alternatively, click on the *Your Profile* link in the left-hand navigation.

Your WordPress Site 0 + New Howdy, Joe Blogg  Help

Edit your Profile

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

Profile

Personal Options

Visual Editor Disable the visual editor when writing

Syntax Highlighting Disable syntax highlighting when editing code

Admin Color Scheme

- Default
- Light
- Blue
- Coffee
- Ectoplasm
- Midnight
- Ocean
- Sunrise

Keyboard Shortcuts Enable keyboard shortcuts for comment moderation. [More information](#)

Toolbar Show Toolbar when viewing site

Name

Username Names cannot be changed.

First Name

Last Name

Nickname (required)

Display name publicly as

Contact Info

Email (required)

Website

About Yourself

Biographical Info

Share a little biographical information to fill out your profile. This may be shown publicly.

Profile Picture



You can change your profile picture on [Gravatar](#).

Account Management

New Password

Sessions

You are only logged in at this location.

After updating your profile, click the *Update Profile* button to save your changes.

Thank you for creatin

Version 4.9.1

If you're an Administrator and would like to edit someone else's profile, click on their user name when viewing the list of Users or click on the *Edit* link that appears beneath their user name when hovering your cursor over each row.

Update the appropriate fields and then click the *Update Profile* button to save all your changes.

Personal Options

- **Visual Editor** – Checking this box disables the Visual Editor when writing and uses the plain html editor
- **Syntax Highlighting** – Checking this box disables the syntax highlighting when editing code in the built-in editor
- **Admin Color Scheme** – Check this radio button next to the colour scheme desired for the administrative panels. You have the choice of eight different color schemes
- **Keyboard Shortcuts** – Checking this box Enables keyboard shortcuts for comment moderation. Keyboard shortcuts are designed to allow you to rapidly navigate and perform actions on comments
- **Toolbar** – Checking this box will display the Admin Bar at the very top of your website (only for the person who is currently logged in)

Name

- **Username** – You cannot edit your Username because it is used as your Username during the login process. Even an Administrator cannot change your Username. Usually, no one else ever needs to see your Username
- **First name** – Enter your first name in this text box
- **Last name** – Enter your last name in this text box
- **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 don't supply a Nickname, then the Username will be placed in this field

- **Display name publicly as** – Select how your name is cited on your blog, from the dropdown list. You can choose from several choices: Nickname, Username, First Name, Last Name, ‘First Last’, or ‘Last First’. If you prefer ‘Last First’, insert a comma after your last name in the *Last Name* text field and choose the last option from the dropdown list. For security reasons, it’s a good idea to keep this different from your Username

Contact Info

- **E-mail** – (mandatory) All users are required to list an email address in their respective Profiles. The email address must be unique for each user. Your blog will use this address to notify you of new comments to your posts and for other administrative purposes. Only other registered users of your blog will have access to this email address. It is never sent anywhere
- **Website** – Enter your website address

About Yourself

- **Biographical Info** – Enter a short description or profile of yourself here. Depending on your theme, this optional information may be displayed when creating new Posts
- **Profile Picture** – The avatar that is displayed is called a Gravatar. A Gravatar is a Globally Recognized Avatar. To create a Gravatar, simply go to gravatar.com and sign up. To use your Gravatar within WordPress, simply add an email address to your Profile that you’ve configured within the Gravatar site and it will automatically display

Account Management

- **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
- **Sessions** – If you’ve left your account logged in at a public computer or you’ve lost your phone, you can click the *Log Out Everywhere Else* button to log you out of everywhere except for your current browser

Tools

The *Tools* menu provides some handy administration tools. Most of the time though, they're used when setting up or configuring your WordPress site and so as such, they won't be covered here in great detail.

Available Tools

The *Available Tools* menu option gives you access to the *Categories and Tags Converter*. The *Categories and Tags Converter* is a tool for converting *Categories* to *Tags* or vice versa. Before it can be used it must be installed via the *Import* menu option.

Import

The *Import* option provides you with various tools for importing content from other blogging systems. You can import content from Blogger, LiveJournal, Moveable Type, TypePad and Tumblr. You can also import content from Blogrolls that use the [OPML Format](#), posts from an RSS feed or content from other WordPress sites. To import content from another WordPress site you first need to install the [WordPress Importer](#) plugin. To import content from another type of site other than WordPress, you'll be prompted to install the relevant Importer plugin after selecting the type of site that you'd like to import your content from.

Export

The *Export* option is used to export your data in XML format, from your WordPress site. The export format is called *WordPress eXtended RSS* or WXR and will contain your posts, pages, comments, custom fields, terms, navigation menus and custom posts. Once you've saved the download file, you can use the *Import* function on another WordPress site to import the content from this site.

Settings

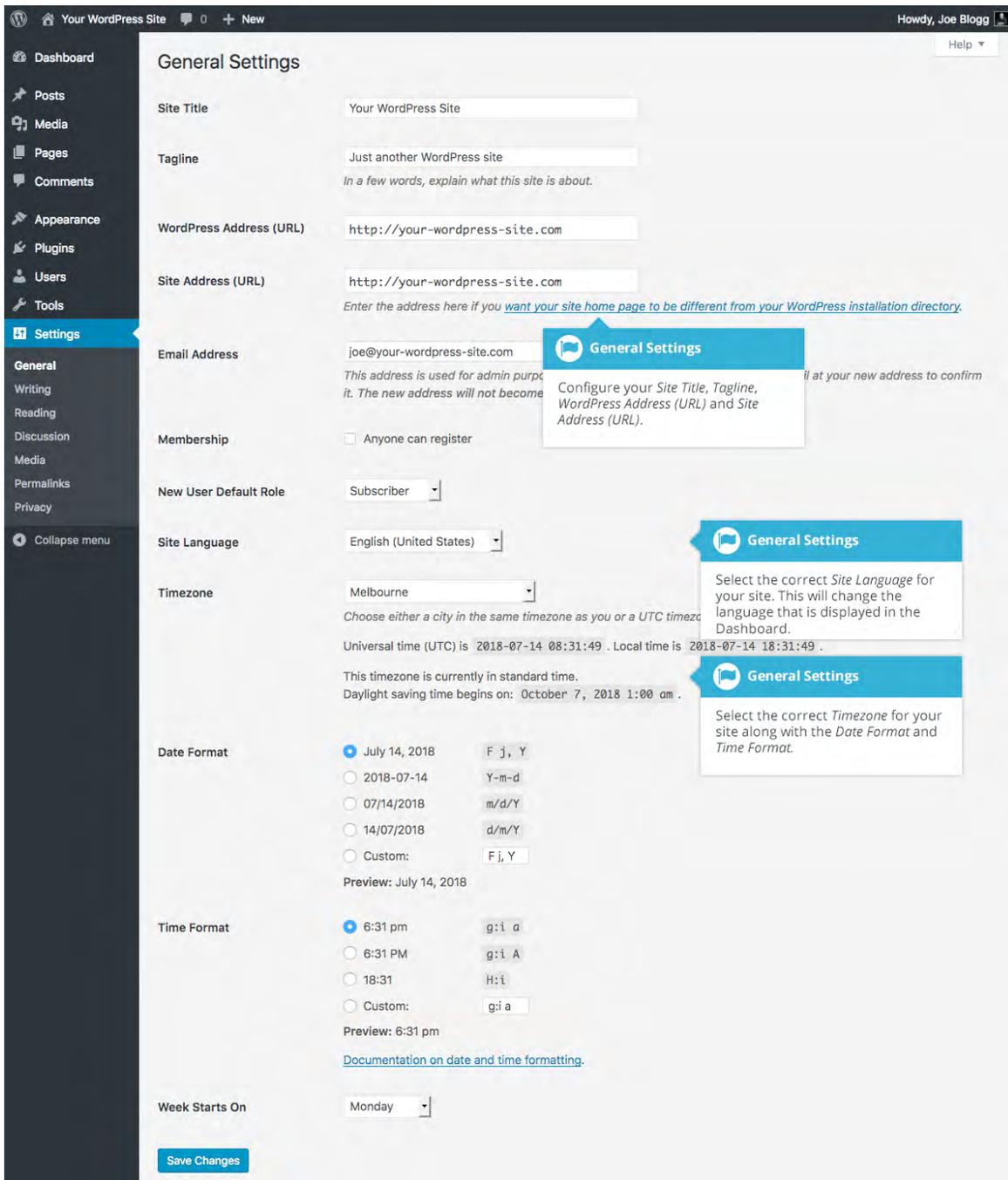
The various *Settings* screens are used to configure your WordPress site. Normally, once your WordPress site is set up there's no reason to change any of these settings. These *Settings* options will only be touched upon very briefly. You can find out lots more information in regards to configuring your site within the [WordPress Codex](#).

General

The *General* settings configure your basic site preferences such as the Site Title and Tag Line, the WordPress Address and Site Address, the administrators email address and the date and time format, among other things.

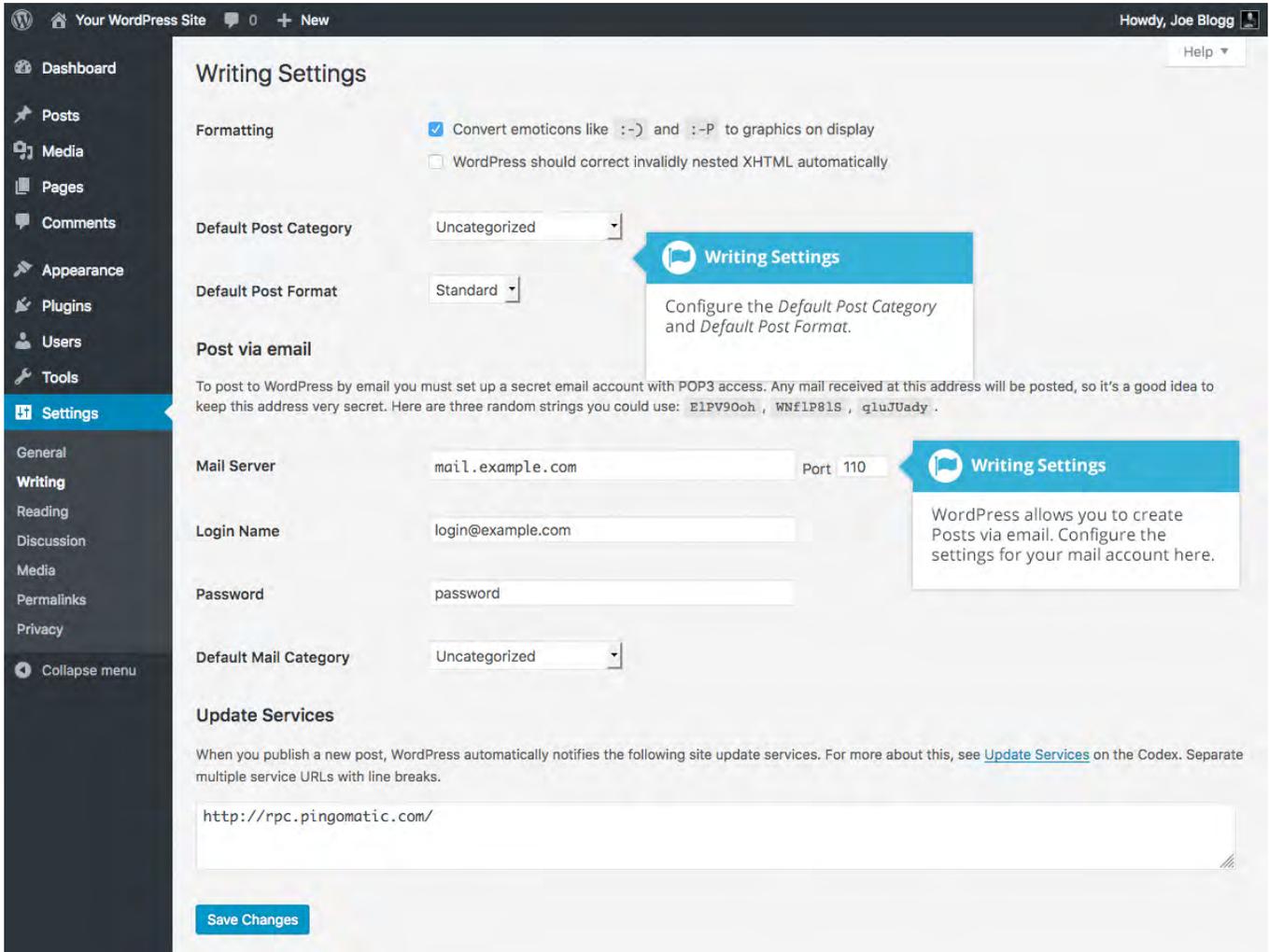
The *WordPress Address (URL)* is the location of your main WordPress core files. The *Site Address (URL)* is the address you want to use for your site homepage. Usually these two URL's are the same but they can be different if, for example, you have your WordPress files stored in a subdirectory.

When you install WordPress, you get the option to select the language that you'd like to use within the Dashboard. After installation, if you'd like to change the language, you can select this using the *Site Language* dropdown at the bottom of the page.



Writing

The *Writing* settings configure various options with regards to your site content. Settings include defining the *Default Post Category*, *Default Post Format* (if supported by your Theme) and if the Link Manager plugin is installed, the *Default Link Category*.

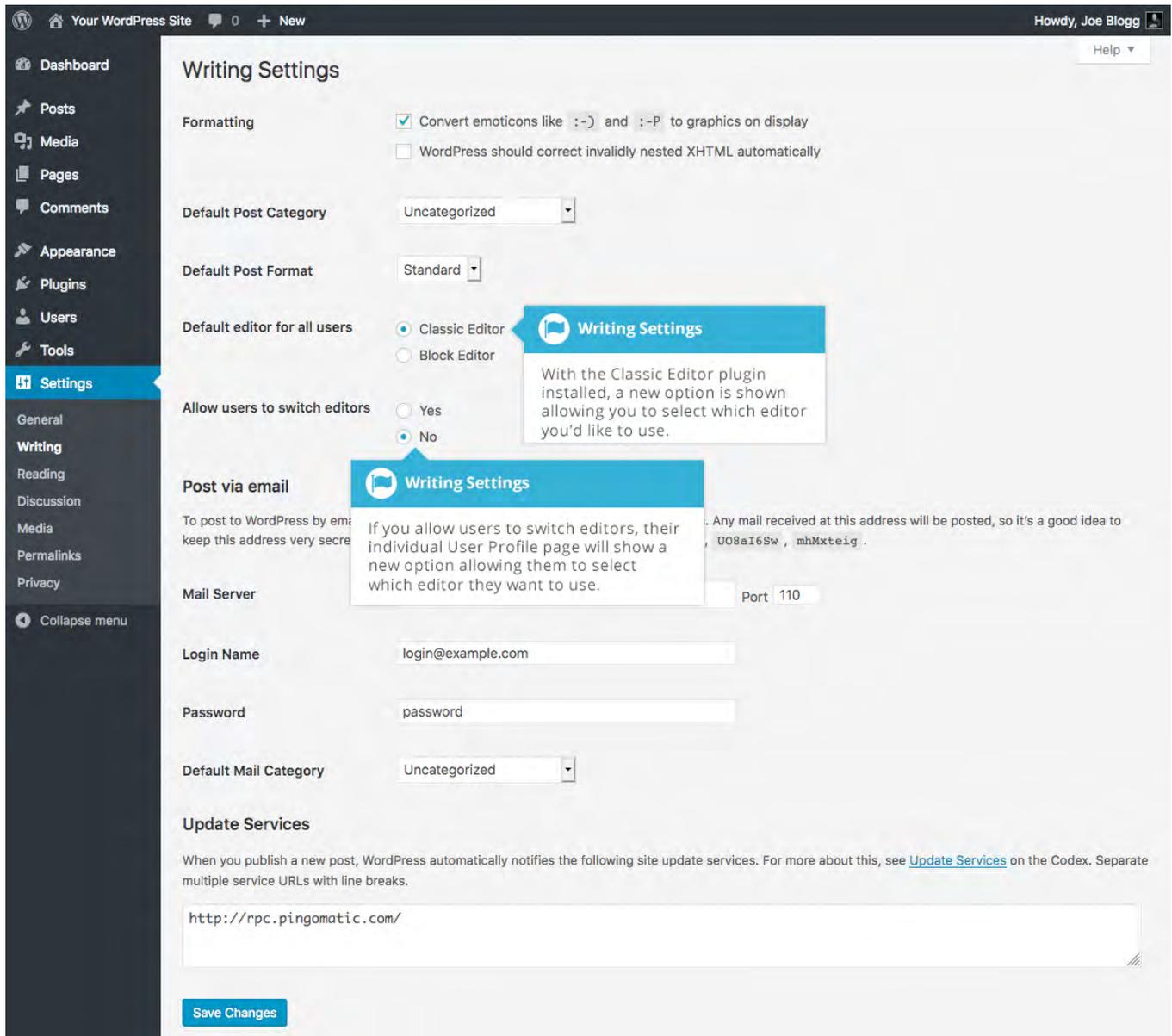


If you decide to install the *Classic Editor* plugin, which allows you use the Classic Editor rather than the Block Editor, you'll see two extra options on this *Writing* settings page.

The *Default editor for all users* option allows you to select the default editor to use. This can either be the Classic Editor or the new Block Editor. If you've installed the Classic Editor plugin then you'll most likely want to select the *Classic Editor* radio button for this option.

If you have multiple editors on your site, the *Allow users to switch editors* option allows your users to select which editor that they'd like to use. If you allow your users to switch editors, their individual User Profile page will show a new option that allows them to select between the Classic Editor and the Block Editor.

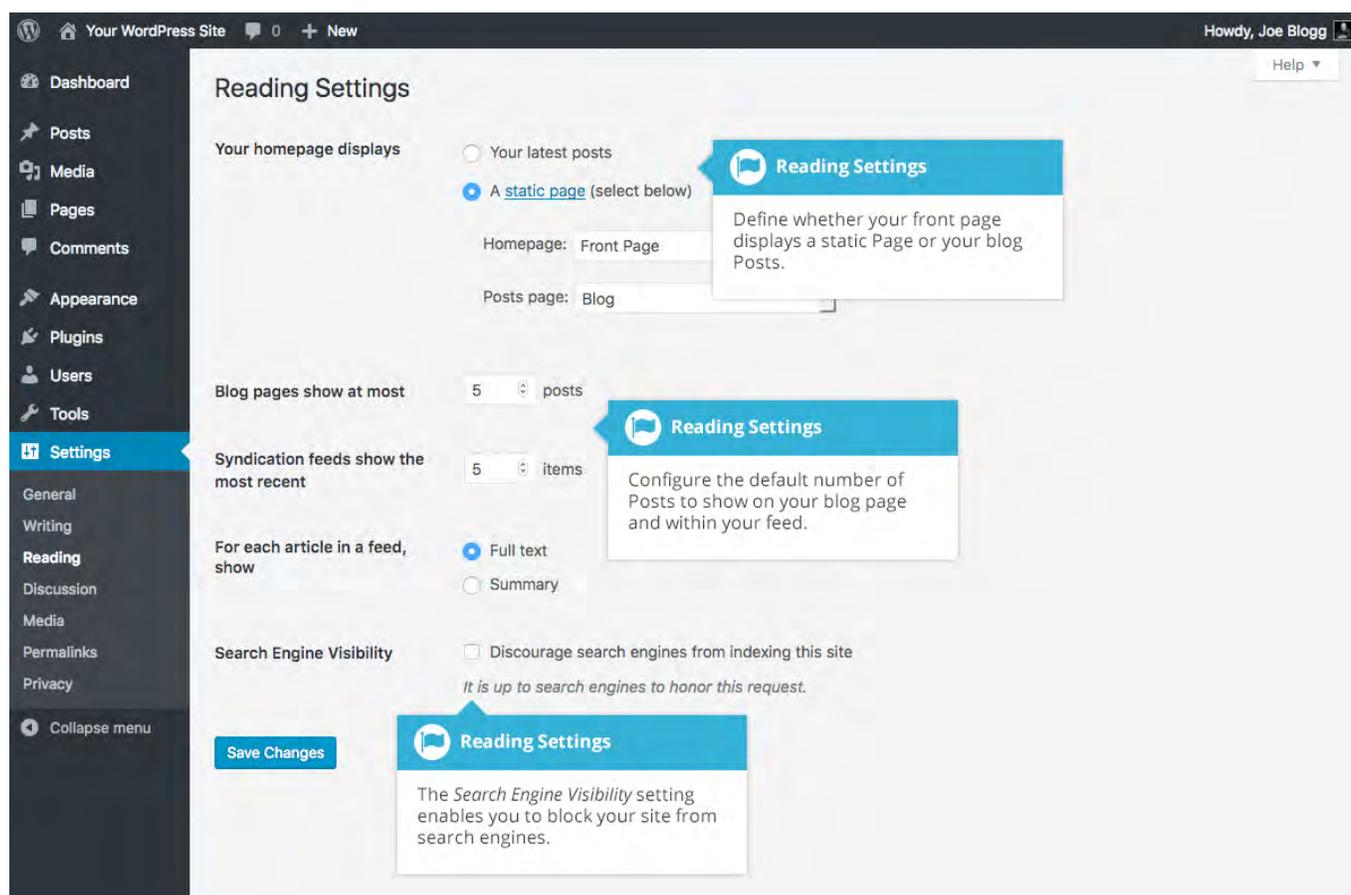
Special care should be taken if you allow your users to select which editor to use. If a user edits a Page or Post with the Block Editor and then another user edits that same Page/Post later on with the Classic Editor, then you may end up causing issues with your content, especially if that first user re-edits the page with the Block Editor again. There's a very good chance that you could lose content or break blocks within the Block Editor. If a page is added with the Block Editor, or an existing page is converted to Blocks, then it's best if only the Block Editor is used to edit that page from then on. Likewise, if a page is added with the Classic Editor, then its best to only edit that page with the Classic Editor from then on.



Reading

The *Reading* settings configure how your site is viewed. You can define whether your front page displays a static Page or your blog Posts, how many blog posts are displayed by default as well as Syndication/RSS options. If you configure your site to display a static front page, you can set which page to display and also which page will show your blog posts.

The *Search Engine Visibility* setting enables you to block your site from search engines or allow it to be visible.



Discussion

The *Discussion* settings define how your readers interact with your site and how your site interacts with other blogs. You can configure [Pingbacks](#) and [Trackbacks](#), whether readers can post Comments or not and if so, how those Comments are moderated and displayed on your site.

This screen also lets you configure whether the Post Author should be emailed whenever someone posts a comment on your site. If you are receiving emails whenever someone posts a comment, simply uncheck the box next to *Anyone posts a comment* within the *E-mail me whenever* section on this screen and then save your changes.

If you would like to be notified whenever a comment is held for moderation, it can be configured on this screen as well within the *E-mail me whenever* section. The email notification is sent to the email address listed on the *Settings > General* page.

Your WordPress Site | 0 | + New | Howdy, Joe Blog | Help

Discussion Settings

Default article settings

- Attempt to notify any blogs linked to from the article
- Allow link notifications from other blogs (pingbacks and trackbacks)
- Allow people to post comments on new articles

(These settings may be overridden for individual articles.)

Other comment settings

- Comment author must fill out name and email
- Users must be registered and logged in to comment
- Automatically close comments on articles older than 14 days
- Enable threaded (nested) comments 5 levels deep
- Break comments into pages with 50 top level comments per page
- last page displayed by default

Comments should be displayed with the older comments at the top of each page

Email me whenever

- Anyone posts a comment
- A comment is held for moderation

Before a comment appears

- Comment must be manually approved
- Comment author must have a previously approved comment

Comment Moderation

Hold a comment in the queue if it contains 2 or more links. (A common characteristic of comment spam is a large number of hyperlinks.)

When a comment contains any of these words in its content, name, URL, email, or IP address, it will be held in the moderation queue. One word or IP address per line. It will match inside words, so "press" will match "WordPress".

Comment Blacklist

When a comment contains any of these words in its content, name, URL, email, or IP address, it will be put in the trash. One word or IP address per line. It will match inside words, so "press" will match "WordPress".

Avatars

An avatar is an image that follows you from weblog to weblog appearing beside your name when you comment on avatar enabled sites. Here you can enable the display of avatars for people who comment on your site.

Avatar Display

- Show Avatars

Maximum Rating

- G — Suitable for all audiences
- PG — Possibly offensive, usually for audiences 13 and above
- R — Intended for adult audiences above 17
- X — Even more mature than above

Default Avatar

For users without a custom avatar of their own, you can either display a generic logo or a generated one based on their email address.

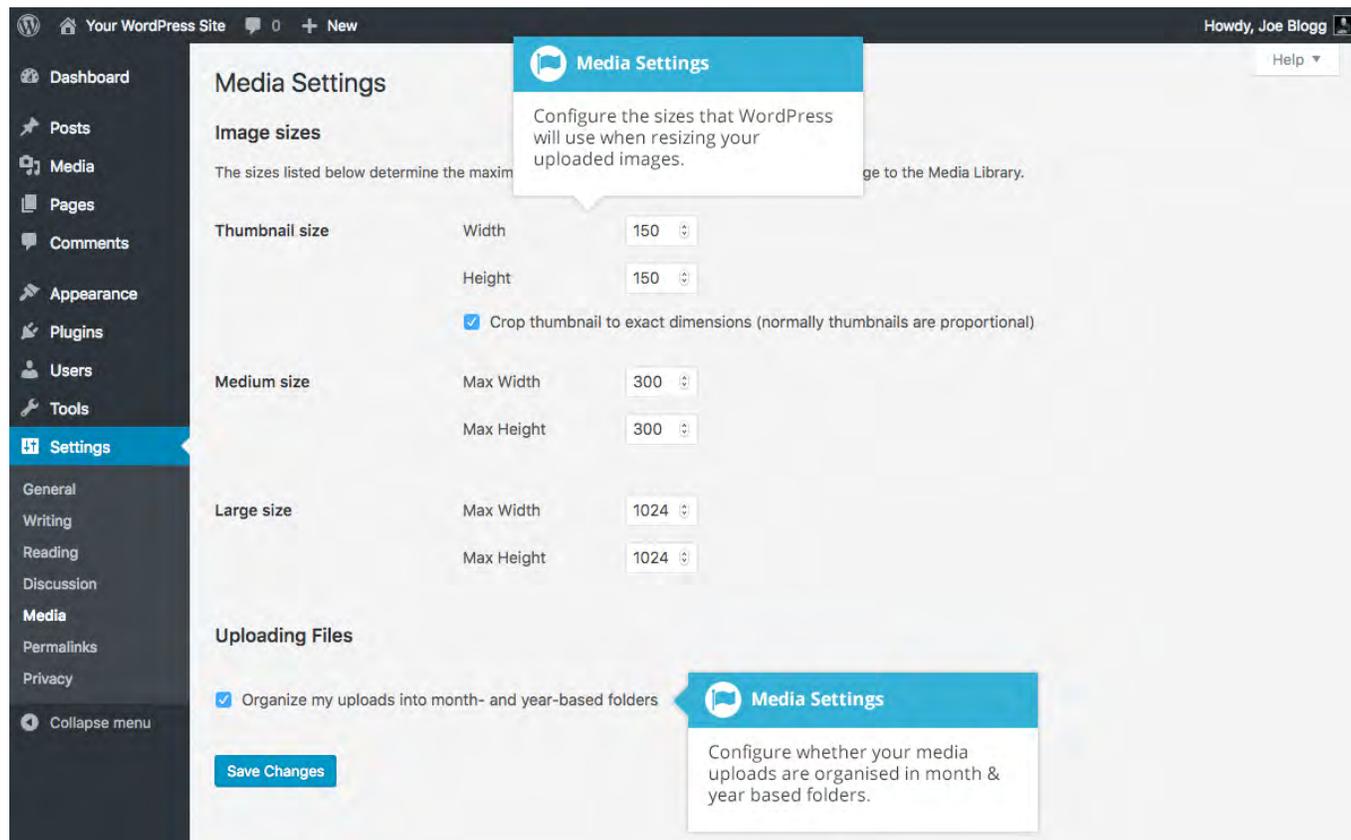
- Mystery Person
- Blank
- Gravatar Logo
- Identicon (Generated)
- Wavatar (Generated)
- MonsterID (Generated)
- Retro (Generated)

Save Changes

Media

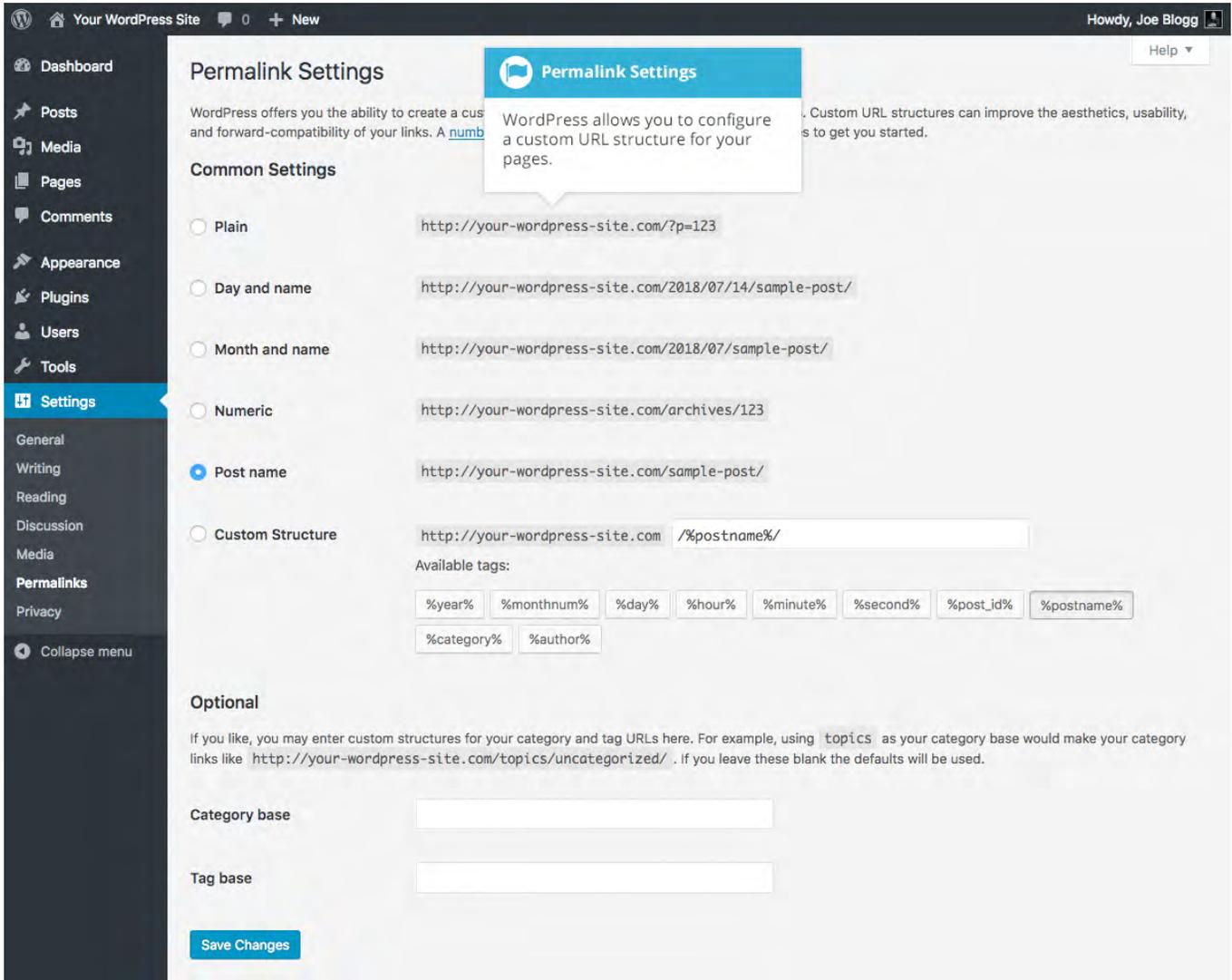
The *Media* settings define the default image sizes that are created when an image is uploaded.

You can also configure whether your uploaded media files are stored in folders based on the year and the month of the upload.



Permalinks

The *Permalink* settings enable you to configure the URL format that is displayed in the web browser when someone browses your site. WordPress will default your Permalinks to the *Day and name* format however you can change this so that the URL is more user friendly. This also helps considerably with Search Engine Optimisation (SEO). To change the way your site URL is displayed simply select one of the radio button options within the *Common Settings* section on this screen. Next to each option is an example of how the URL would be displayed.



Privacy

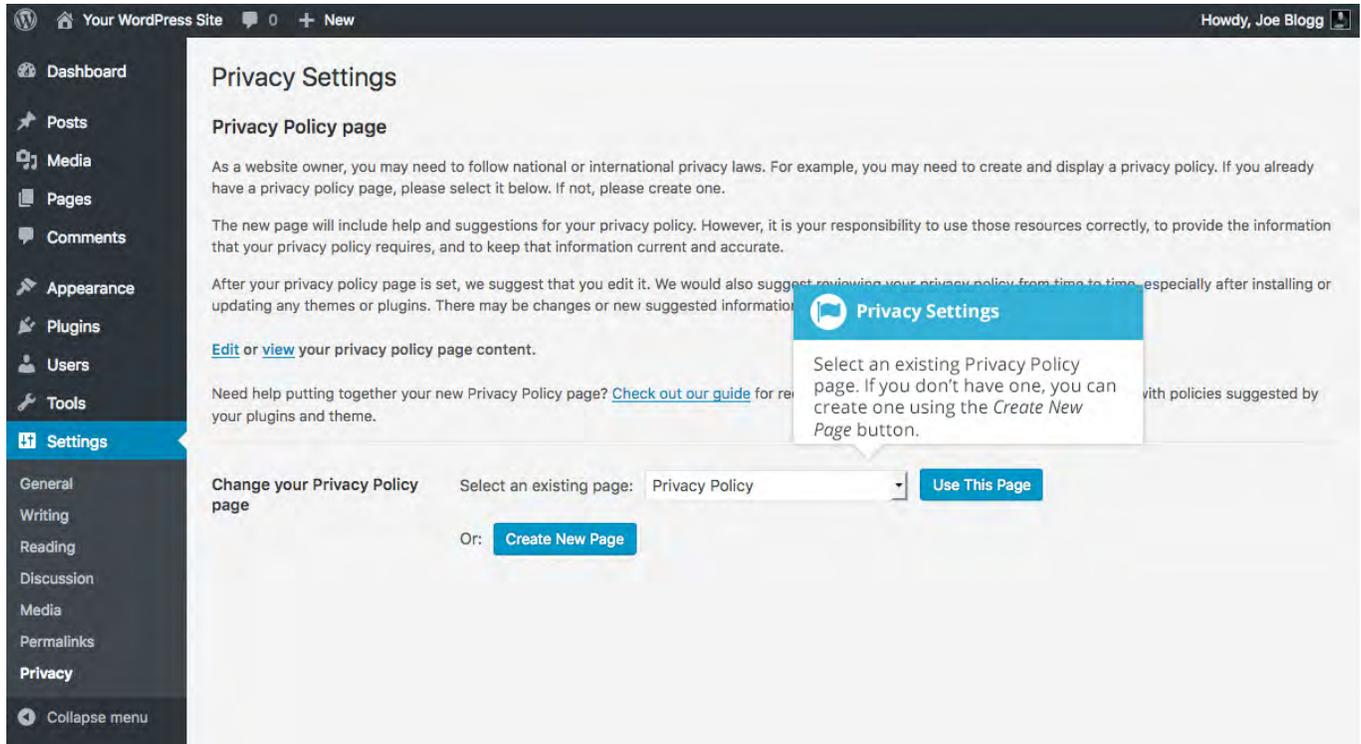
With the introduction of the European Union's *General Data Protection Regulation* (GDPR), WordPress now makes it easier to add a Privacy Policy page to your website.

Whilst the GDPR is a European regulation, its requirements applies to all sites no matter where they're located, and its purpose is to help inform EU residents how a website collects, stores and processes their personal data.

The *Privacy* settings enables you to select an existing Privacy Policy page, if you already have one. If you don't already have a Privacy Policy page, you can click the *Create New Page* button and WordPress will create a new page for you and

also populate it with some suggested text. Prior to publishing this Privacy Policy page, please ensure you read it thoroughly to ensure that the content accurately reflects your website and policies. This pre-populated content also includes several blank sections which are recommended to be filled in.

Your selected Privacy Policy page will be shown on your Login and Registration pages. It's also recommended that you add a link to your Privacy Policy on every page of your website. If you have a footer section on your site, this is a great place to add it.



Keeping your Site Updated

From time to time, themes, plugins & WordPress will require updating. Updates typically happen when developers release security patches or add extra functionality.

It's good practice to keep your themes, plugins & WordPress version updated to the latest versions. The top two reasons for sites being hacked are insecure passwords & outdated (vulnerable) software.

In an effort to promote better security and to streamline the update experience, WordPress will automatically update itself, if it's able to, whenever a minor version is released (e.g. v4.9.8, v5.0.2). These minor releases are usually for maintenance and security purposes or translation file updates. Only core WordPress files will be auto-updated. Your themes or plugins won't be automatically updated.

Once your site is auto-updated your site administrator will be notified by email. If your WordPress installation can't update itself automatically for one reason or another, your site administrator will be notified of this as well.

To update your WordPress version manually or to update your themes and plugins, hover your cursor over the *Dashboard* menu option in the left-hand navigation menu and in the fly-out menu, click the *Updates* link. Alternatively, click the *Dashboard* menu option and then click the *Updates* link underneath.

The *Updates* page is divided into three sections. If your version of WordPress requires updating, this will be displayed at the top of the page. Below that, you'll be notified of any plugin updates and below that again, theme updates.

Updating your WordPress version is as simple as clicking the *Update Now* button. WordPress will download the necessary files, perform a validation of those files and then automatically update your site.

Before updating your site, it's always wise to perform a backup first, just in case something unfortunate happens during or after the installation.

The screenshot shows the WordPress dashboard's 'Updates' section. At the top, it says 'WordPress Updates' and includes an important note: 'Important: before updating, please [back up your database and files](#). For help with updates, visit the [Updating WordPress](#) Codex page.' Below this, it indicates the last check was on December 30, 2018, at 6:40 pm, with a 'Check Again' button.

The main section is titled 'An updated version of WordPress is available.' It states 'You can update to [WordPress 5.0.2](#) automatically:' and features a prominent 'Update Now' button. A callout box titled 'Updating WordPress' explains: 'You will be notified if your WordPress version is out of date. Click the *Update Now* button to update your WordPress files.'

The 'Plugins' section follows, stating 'The following plugins have new versions available. Check the ones you want to update and then click "Update Plugins".' It includes an 'Update Plugins' button and a 'Select All' checkbox. One plugin is listed: 'Akismet Anti-Spam'. It shows the current version (4.0.8) and the update target (4.1), along with compatibility information for WordPress 5.0.2 (100%). A callout box titled 'Updating Plugins' instructs: 'Select the plugins you wish to update and click the *Update Plugins* button.'

The 'Themes' section is similar, stating 'The following themes have new versions available. Check the ones you want to update and then click "Update Themes".' It includes an 'Update Themes' button and a 'Select All' checkbox. Two themes are listed: 'Twenty Seventeen' (current 1.7, update to 1.9) and 'Twenty Sixteen' (current 1.5, update to 1.7). A callout box titled 'Updating Themes' instructs: 'Select the themes you wish to update and click the *Update Themes* button.'

If there are any plugins that can be updated, these will be listed in the *Plugins* section on the page. To update your plugins, tick the boxes next to each of the plugins you wish to update and then click the *Update Plugins* button. The new plugin files will be downloaded and automatically installed.

If there are any themes that can be updated, these will be listed in the *Themes* section on the page. To update your themes, tick the boxes next to each of the

themes you wish to update and then click the *Update Themes* button. The new theme files will be downloaded and automatically installed.

After your site has been updated, no matter whether it's been done automatically, manually or just themes and plugins, it's a good idea to give your site a quick test to make sure it's functioning as expected. This will ensure that the new themes, plugins or even WordPress itself hasn't introduced new functionality that adversely affects your site or changes how your site operates.

Where To From Here?

If you're looking for more resources to further your WordPress knowledge the first place to check out is the WordPress.org website. There you'll find technical support and new resources like plugins which are a fantastic way to add extra functionality to your site without having to modify your theme files. The [Plugin Directory](#) has over 54,000 different plugins that are available to download, for free. Furthermore, if you want to change how your site looks, have a look in the WordPress [Themes Directory](#) which is also there on the WordPress site.

If you find you need more information on a particular topic, have a search through the [WordPress Codex](#) which goes into greater detail about how WordPress works. Not only will you find information about updating your site content but there is all sorts of other useful information that will help you with installing WordPress, troubleshooting, using plugins & themes and also theme development, for the more technically minded.

Once your website is humming along nicely, you might want to think about getting involved in the awesome WordPress community. One of the easiest ways to get involved is simply by helping others within the [WordPress Support Forums](#). There is always someone there who's newer to the learning curve than you, and learning is so much improved while you're teaching others! There are topics there for all ability levels, from installation issues, theme and template issues, and general troubleshooting all the way through to more advanced areas of theme and plugin development.

It's a great benefit not just for yourself, but for others as well in getting more involved in the WordPress community. This could be through core commits, UI design, testing beta releases or even just helping people on the WordPress forums. Or, how about getting along to Meetups where users and developers alike get together and learn from and teach each other, show off the projects they're working on and meet others to collaborate with. The more we work together to make WordPress great, the more robust the platform becomes. Everyone wins!

Last but not least, don't forget to keep in touch with us on the web;

<http://easywpguide.com>