

VISUAL **QUICKSTART** GUIDE



WordPress

Third Edition



JESSICA NEUMAN BECK
MATT BECK

© LEARN THE QUICK AND EASY WAY!

EBOOK

VISUAL QUICKSTART GUIDE

WordPress

Third Edition

JESSICA NEUMAN BECK • MATT BECK

WordPress: Visual QuickStart Guide, Third Edition

Jessica Neuman Beck and Matt Beck

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Proofreader: Patricia J. Pane
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Table of Contents

	Introductionvii
Chapter 1	First Steps	1
	Setting Up WordPress	2
	Using an Installer	4
	Setting Up a Database	7
	Installing WordPress	10
	Putting It All Together	18
Chapter 2	Getting Familiar with WordPress	19
	How WordPress Works: An Overview	20
	Finding Your Way Around the Dashboard	21
	Default Content	27
	Upgrading WordPress	29
	Putting It All Together	34
Chapter 3	Settings	35
	General Settings	36
	Writing Settings	39
	Reading Settings	42
	Discussion Settings	44
	Media Settings	47
	Permalinks	49
	Putting It All Together	50
Chapter 4	Managing Accounts	51
	Configuring Your Account	52
	Managing User Accounts	55
	Putting It All Together	60
Chapter 5	Setting Up a WordPress Theme	61
	Using the WordPress Default Theme	62
	Choosing a New Theme	69
	Using the Theme Customizer	73
	Custom Headers and Backgrounds	76
	Putting It All Together	80

Chapter 6	Widgets and Plug-ins	81
	Widgets versus Plug-ins: What's the Difference?	82
	Adding and Activating Plug-ins	83
	Using Widgets	87
	Updating Plug-ins	91
	Putting It All Together	94
Chapter 7	Adding Content	95
	Adding Posts	96
	Adding Pages	101
	Editing Posts and Pages	104
	Setting Up and Using Categories	109
	Using Tags	112
	Other Ways to Add Content	115
	Putting It All Together	124
Chapter 8	Menus	125
	Setting Up Menus	126
	Adding Menus to Your Site	129
	Editing Menus	130
	Putting It All Together	132
Chapter 9	Working with Media	133
	Using the Media Library	134
	Editing Images	139
	Creating and Managing Image Galleries	142
	Using Audio and Video Files	146
	Putting It All Together	152
Chapter 10	Managing Comments	153
	Enabling and Disabling Comments	154
	Moderating Comments	159
	Fighting Spam with Akismet	162
	Putting It All Together	166
Chapter 11	Getting Fancy with Themes	167
	Customizing Your Theme with CSS	168
	Adding a Favicon	173
	Editing the Functions File	175
	Putting It All Together	180

Chapter 12	Advanced Theme Development	181
	Anatomy of a WordPress Theme.	182
	Building a Theme from Scratch	184
	Working with Template Files	194
	Working with Template Tags	196
	Using the Loop.	201
	Putting It All Together.	202
Chapter 13	Custom Content Types	203
	Setting Up a Custom Post Type	204
	Using Custom Taxonomies.	208
	Putting It All Together.	212
Chapter 14	One Installation, Multiple Blogs.	213
	Setting Up a Network	214
	Administrating a Blog Network	220
	Putting It All Together.	224
Chapter 15	More Ways to Customize WordPress.	225
	Setting Up and Using Jetpack	226
	Monetizing Your Site: Ad Integration	229
	Using Google Fonts.	230
	RSS Feeds	232
	Putting It All Together.	234
Chapter 16	Best Practices	235
	Search Engine Optimization	236
	Setting Up a Sitemap	241
	Speeding Up Your Site	242
	Using Stats to Evaluate Traffic	246
	Backing Up Your Data and Files	248
	Putting It All Together.	254
Appendix A	Troubleshooting	255
Appendix B	Online Resources	263
	Index.	267

Introduction

WordPress is an open source blogging platform and content management system with the largest user base of any self-hosted blogging tool in the world. Users can set up a blog on WordPress.com or install WordPress with a hosting company or on a personal server, allowing for flexibility and easy customization. It's highly extensible, with a veritable treasure trove of add-ons and plugins available both in the official WordPress repository and elsewhere on the Internet. Because the project is open source, it's easy for developers to work with—and it's free!

In this introduction, we talk about what a blog is and how to use it. We'll tell you a little more about WordPress and give you an overview of new WordPress features. We'll also explore the differences between WordPress.org and WordPress.com to help you decide which one is right for you.

In this book, we'll be focusing on the self-hosted version of WordPress available at WordPress.org. This version offers the most flexibility and customization options. However, many of the usage tutorials are applicable to both self-hosted WordPress installations and WordPress.com blogs, so if you're new to WordPress, read on!

Blogs Explained

A *blog* is a Web site that displays posts or articles in a sequential order, with the newest posts appearing first. The word “blog” comes from *Weblog*, itself a contraction of *Web* and *log*.

Blogs began as online journals, usually featuring a single author writing about a specific topic or interest. Blogs have expanded, however, and now encompass news sites, magazine-style sites, and even corporate Web sites, in addition to personal journals.

Blogs often fill a niche, focusing on a particular subject, and often encourage participation by enabling comments on articles or posts.

Many sites are built on blogging platforms like WordPress because the interface for adding posts and pages is easy for nontechnical users to master.

The blog format tends toward the following:

- A new page is automatically generated for each post.
- Each post is defined by one or more categories.

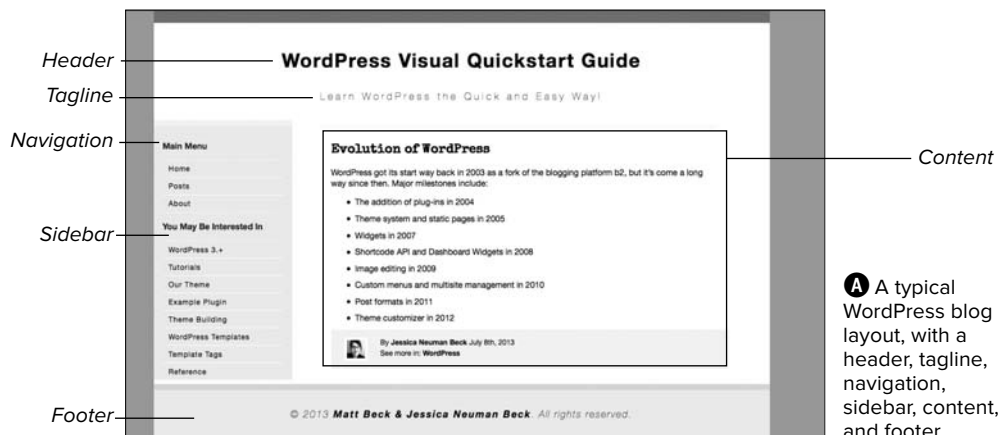
- Posts can be further categorized by tags.
- Posts can be read sequentially or browsed in archives by date, category, or tag.

Design and layout are dictated by a predefined template or theme; changes to the theme affect the look and feel of the site but do not affect content (making it easy to modify a site's look).

Anatomy of a WordPress Blog

While blogs can vary widely in layout, most contain these six basic segments. We're using the default WordPress theme as an example of a typical blog layout **A**. The basic segments are:

- **Header:** This section usually includes the blog's name and a graphic such as a logo.
- **Tagline (optional):** The tagline or slogan often gives the reader a better idea of what the blog is about. The WordPress default tagline is "Just another WordPress weblog."
- **Navigation:** This consists of internal links to the different sections of the site, such as Archives, About, and Home.
- **Content:** This section changes depending on what section of the blog is being viewed; for example, on the home page the content may be an overview of the latest posts, while the contact page would include information and perhaps a form for getting in touch with the blog's author.
- **Sidebar:** Additional navigation may be located here, as well as snippets of code known as *widgets*, which may contain information such as the author's latest Twitter posts, polls, an overview of recent comments, or photos recently posted to Flickr.
- **Footer:** This section usually contains copyright and design information.



A A typical WordPress blog layout, with a header, tagline, navigation, sidebar, content, and footer.

In addition, each post's page contains information specific to the post, such as the time and date of posting, the author, the categories and/or tags, and (if comments are enabled) a place for readers to contribute their thoughts.

What's New in This Edition

WordPress regularly releases updates to its core platform, debuting new features, security fixes, and stability increases in controlled bursts. After WordPress 2.1, the development team began releasing updates on a regular schedule, roughly every three to four months. Major updates are named after famous Jazz artists.

WordPress 3.0 (named after Thelonious Monk) saw a major overhaul of the WordPress platform, merging WordPress MU (Multi User) with the WordPress core and making it possible to manage multiple installations of WordPress from one main installation. It also included many new features, such as:

- Custom menus
- Custom headers
- Custom backgrounds
- Contextual help
- Support for custom post types and custom taxonomies

Since the 3.0 update, WordPress has continued to evolve, and has added more new features:

- Internal linking
- The admin bar
- Post formats
- A full-screen editor
- A refreshed administrative UI
- Improved revisions
- New audio/visual APIs

In addition, the WordPress team has decided to release a new default theme every year. These themes will take advantage of the latest WordPress features and have been named after the year in which they were released (Twenty Ten, Twenty Eleven, and the latest, Twenty Thirteen). These default themes are included in core updates and are available to both self-hosted WordPress users and users on WordPress.com.

WordPress.org Versus WordPress.com

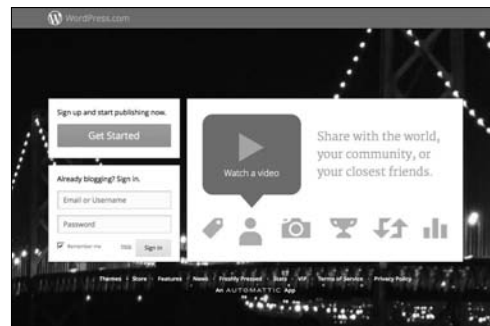
There are two distinctly different versions of WordPress: the downloadable, open source version found at WordPress.org **A** and the hosted version at WordPress.com **B**.

The self-installed version of WordPress, WordPress.org, is the most common. You install it on your own Web server (most likely on a hosting account), and you have full access to both the source code and the database where your information is stored.

WordPress.com is a free, hosted blog service (meaning you can use it without a hosting account). Setup, upgrades, spam protection, and backups are all taken care of by the WordPress.com service, but you do not get FTP or shell access and cannot modify your site's PHP. WordPress.com also has some content restrictions (for example, paid or sponsored post content is not allowed).



A WordPress.org is the open-source, self-hosted variety of WordPress.



B WordPress.com is a free, hosted blog service.

Here's a handy reference table so you can quickly see the difference between WordPress.org and WordPress.com.

At first glance, a blog hosted on WordPress.com is similar to the self-hosted version. Like other hosted blogging services, such as TypePad and Blogger, WordPress.com allows basic theme customization (from a preapproved set of themes) and lets users add pages, sidebars, and widgets. The free account takes only seconds to set up. Free users are given a subdomain at [yourname].wordpress.com and currently get 3 GB of storage for images and media. Such options as theme styling, suppression of WordPress text ads, and a custom domain name are available for a fee. It's a good solution for beginners looking to have an online presence without owning a domain name or paying for Web hosting.

If you're an advanced user, a Web professional, or someone using WordPress for a business, however, you need to be able to modify and customize your site

to create a unique brand experience. That's where the self-hosted version of WordPress from WordPress.org comes in. With it, you have full control over every aspect of your site. You'll be able to build your own theme, install plug-ins, and easily modify your design. This is particularly important if you want to use WordPress as a lightweight content management system (commonly referred to as a CMS) rather than "just a blog."

With a self-hosted WordPress installation, you can create a full-featured site that functions in whatever way you want it to, limited only by your imagination (and your knowledge of theme building).

TIP If you're still not sure which version of WordPress is right for you, sign up for a free account at WordPress.com to give the hosted service a test drive. Even if you don't end up using your WordPress.com blog, a WordPress.com account can be used to tie in with some fun plug-ins for the self-hosted version of WordPress, like Jetpack. We talk more about installing the Jetpack plug-in in Chapter 15, "More Ways to Customize WordPress."

Table 1.1 Comparison of WordPress.org and WordPress.com

WordPress.org	WordPress.com
Free to use	Free to use basic version
Installed on your own Web server or Web-hosting account	Hosted on WordPress.com
Ads are not included by default (although you may choose to run your own ads)	Ads may be displayed on your blog
Thousands of plug-ins and themes	Limited selection of plug-ins and themes
Fully customizable	Features may be extended by paying for premium services
Unlimited user accounts	Number of users is limited
No content restrictions	Content restrictions apply
Requires setup and maintenance	Requires no setup aside from choosing theme and entering content
Analytic statistics offered by plug-ins	Built-in analytic statistics

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Managing Accounts

WordPress user accounts allow people to access your site and its content in different ways. Administrators have full access to all parts of your site, including theme and plug-in settings and user management. You can set up Author and Editor accounts to let your users post articles, and Subscriber accounts make commenting a breeze. You can even restrict access to certain portions of your site to registered users.

In this chapter, we'll give you the lowdown on all the account types and how to use them. We'll also show you how to configure your own account to get the most out of your WordPress experience by enabling and disabling such features as the Admin toolbar and the Visual Editor.


In This Chapter

Configuring Your Account	52
Managing User Accounts	55
Putting It All Together	60

Configuring Your Account

Make your WordPress installation as unique as you are. You can customize everything from the way your name is displayed to the color scheme for your admin screen.

To access your account information:

1. Click your username on the top right of any area in your Admin toolbar (where it says “Howdy, *username*”) .

or

2. Click Users > Your Profile in the sidebar.



-  Click your username to edit your account information.

Profile Help

Personal Options

Visual Editor ☐ Disable the visual editor when writing

Admin Color Scheme ☐ Blue ☒ Gray

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

Toolbar ☒ Show Toolbar when viewing site

Name

Username Username cannot be changed.

First Name

Last Name

Nickname (required)

Display name publicly as

Contact Info

E-mail (required)

Website

AIM

Yahoo IM

Jabber / Google Talk

About Yourself

Biographical Info

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

New Password If you would like to change the password type a new one. Otherwise leave this blank.

Type your new password again.

Strength Indicator Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! " ? \$ % ^ & * .

B Profile options in the admin screen.

To set up your profile:

1. From the Profile page, choose among the Personal Options **B**. You can choose to disable the Visual (WYSIWYG) Editor when writing and choose a color scheme for your admin dashboard, plus you can enable keyboard shortcuts for moderating comments. You can also choose whether to display the Admin toolbar when viewing your site.
2. In the Name section of the profile page, change or enter your full name and a nickname, and then choose your preferred display name from the drop-down menu **C**. This name will display in the “Howdy, *username*” salutation at the top of the admin screen and also on your posts and comments.

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Name

Username Username cannot be changed.

First Name

Last Name

Nickname (required)

Display name publicly as

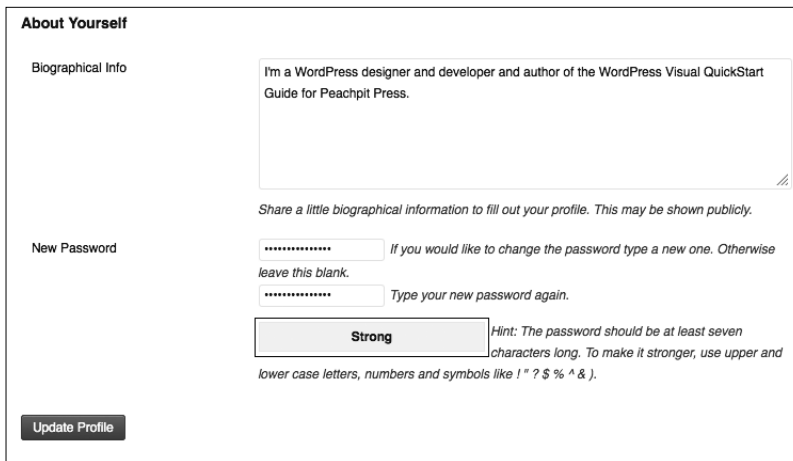
C You can change anything except your username, and you can choose a preferred nickname from the drop-down menu.

3. If you want to provide additional contact information, do so in the Contact Info section. You can change the email address associated with your username, and you can add other contact information, such as the URL for your website and your instant messaging identities **D**.
4. In the About Yourself section, add biographical information if you like. Some themes display this publicly on the site. The About Yourself section is also where you can update your password **E**. You'll use this password to log in to the site, so be sure to choose something you will remember! WordPress will let you know whether your password is strong or weak in the Strength indicator.

TIP When you're choosing a password, WordPress recommends using upper- and lowercase letters, numbers, and symbols (! " ? \$ % ^ &) to keep hackers from accessing your account.



D Update your email address and add other contact info here.



E The Strength indicator will tell you whether you have chosen a password that would be difficult for a hacker to guess.

Managing User Accounts

Whether your WordPress site is a solo affair or a group effort, user accounts make it easy to see who has access to what. You can add new user accounts manually or allow prospective users to add themselves (at an account level that you have specified). You can get rid of troublesome or outdated accounts with just a few clicks.

Subscribers vs. Visitors

Anyone on the Internet can visit your site once it is live. If you've enabled commenting, your visitors have the ability to leave comments on your site, which can sometimes be a problem if you get targeted by a spambot or find yourself fielding hostile anonymous messages.

One way to cut down on spam and add a degree of accountability is to require that visitors sign up as subscribers before they can comment. (See the "Discussion Settings" section in Chapter 3, "Settings," for details.)

A Subscriber account is a WordPress user type that gives commenters the ability to read your site and to fill out their own profile. Subscribers can comment and edit their own profiles, but they cannot add new content to your site.

Another added bonus of requiring subscriber accounts for commenters: If someone is posting hostile or harassing comments, you can simply delete that person's account. As a visitor the person still can view your posts, but no longer will be able to comment on them.

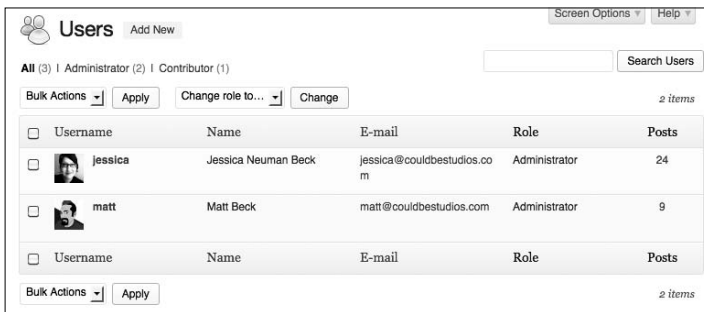
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To add a user account:

1. Click Users in the sidebar menu to access the list of current user accounts for your WordPress site **A**. You'll be taken to the Users page **B**.
2. Click Add New to add a new user. You'll be taken to the Add New User screen **C**.
3. Enter a username, email address, and password for your new user (the user will have the option of changing the password when he or she logs in). You can select whether you want to send login information (including the password you've chosen) to the new user by email.
4. Set the user's first and last name and Web site address here, and select the new user's role from the drop-down menu **D**.



A Click Users to access the list of current user accounts.



B Current users and their roles are listed here.

A screenshot of the WordPress 'Add New User' screen. It has a form with fields for Username (required), E-mail (required), First Name, Last Name, Website, and Password (twice, required). There's a 'Strength Indicator' section with a hint: 'Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! " \$ % ' & ;'. Below the form, there's a 'Send Password?' checkbox and a 'Role' dropdown menu set to 'Subscriber'. An 'Add New User' button is at the bottom.

C The Add New User screen lets you manually add a new user.

A screenshot of the WordPress 'Add New User' screen with the form fields filled out. The Username is 'matt', E-mail is 'matt@couldbestudios.com', First Name is 'Matt', Last Name is 'Beck', and Website is 'http://www.couldbestudios.com'. The Password fields are filled with '*****'. The 'Send Password?' checkbox is checked, and the 'Role' dropdown menu is set to 'Administrator'. The 'Add New User' button is at the bottom.

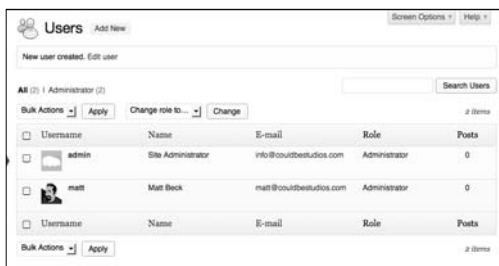
D Fill out these fields to create a new user.

5. Click Add User to create the new user account. You'll return to the Users screen, where you'll see a confirmation message at the top of the page **E**.

TIP If you don't select the "Send this password to the new user by email" check box in the Add New User screen, you'll need to notify the user of the login information yourself. The default user role for new users can be set or changed in Settings > General.

To change user roles:

1. On the Users page, select the check box next to the username of the user whose role you want to change.
2. From the "Change role to" drop-down menu, choose the new role **F**.
3. Click the Change button when you have made your selection to apply the new role to the selected account(s). A message saying "Changed role(s)" will appear at the top of the screen **G**.

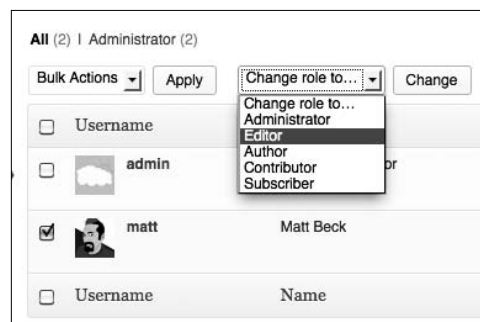


E You've successfully created a new user!

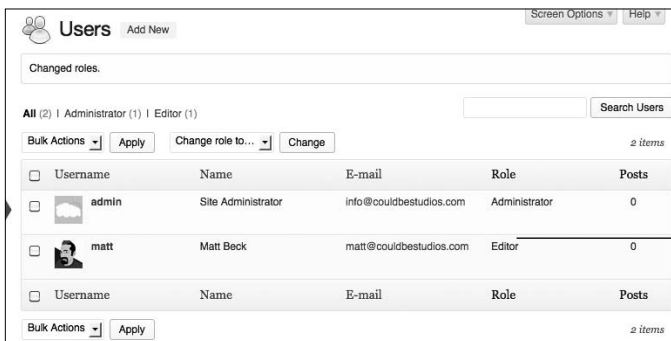
The More, The Merrier: Multiple Authors

If you plan to have more than one person writing on your site, you can take advantage of Author accounts. Authors can write, manage, and publish their own posts without being able to edit anyone else's. Each post will be associated with the author's name. You can even set up author profile pages that display each author's bio, a link to their personal web sites, and a list of the articles they have published on your site.

To learn how to create author pages, see Chapter 15, "More Ways to Customize WordPress."



F Choose a user and change roles using the drop-down menu.



G Success! You've changed a user's role.

Role changed from Subscriber to Editor

Breakdown of User Account Types

Account types in WordPress are also referred to as *roles*, and they're broken down as follows:

- **Super Admin:** When multi-site features are enabled in WordPress, a Super Admin can access the site network administrative features, as well as all other features available to an Administrator (see the section “Administering a Blog Network” in Chapter 14, “One Installation, Multiple Blogs”).
- **Administrator:** This is typically the most privileged account type used for a single site, with access to all administrative features, including theme editing and user management.
- **Editor:** Editors can publish and manage their own posts and pages as well as those of other Editors, Authors, and Contributors.
- **Author:** This role gives users the ability to write, manage, and publish their own posts and pages.
- **Contributor:** A Contributor can write and manage his or her own posts, but cannot publish without approval from an Editor or Administrator.
- **Subscriber:** This type of user can read and comment on posts and receive notification when new articles are published.

To edit user profiles:

1. On the Users page, click a username to open the user's profile.

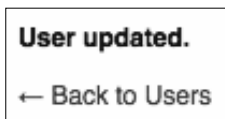
Edit the user's profile. As the admin you can assign user roles in addition to setting general profile information **H**.

2. After making changes to a user's profile, click Update User at the bottom of the screen.




A confirmation will appear at the top of the page **I**.




H The User Profile editing screen.



I The message User Updated lets you know that your changes have been saved.

<input type="checkbox"/>	Username	Name
<input type="checkbox"/>	 admin	Site Administrator
<input checked="" type="checkbox"/>	 jessica Edit Delete	Jessica Beck
<input type="checkbox"/>	 matt	Matt Beck





J Choose users to delete from this list.


Users
[Add New](#)


All (4) | Administrator (2) | Editor (1) | Subscriber (1)

Bulk Actions

Bulk Actions
 Delete

<input type="checkbox"/>		Name
<input type="checkbox"/>	 admin	Site Administrator
<input type="checkbox"/>	 jessica	Jessica Beck
<input type="checkbox"/>	 matt	Matt Beck
<input checked="" type="checkbox"/>	 sample	sample user
<input type="checkbox"/>	Username	Name

K Click Apply to continue.


Delete Users

You have specified this user for deletion:

ID #5: sample

What should be done with posts owned by this user?

☒ Delete all posts.

☐ Attribute all posts to:

L Choose an option and confirm deletion.

To delete user accounts:

1. On the Users page, select the check boxes next to the name of the user(s) you wish you delete **J**.
2. From the Bulk Actions drop-down menu, select Delete **K**. Click Apply to go to the Delete Users page.
3. You can either delete all of the posts and links associated with the users you're deleting, or you can assign them to another user, such as the admin account **L**. Click Confirm Deletion.

Back on the Users page, you'll see a confirmation message at the top of the screen telling you how many users were deleted **M**.

TIP If the user you're deleting has contributed content to your site that you want to keep, you can assign those posts and links to another user. If you're deleting a user because of inappropriate or abusive posts or comments, choosing the Delete All option is best.

User deleted.

M You'll see a message telling you how many users were deleted.

Putting It All Together

- 1. Experiment with your profile options.** When you enter biographical information, is it displayed on your site?
- 2. Create an alternate user account.**
When you set up a new user, can you use the same email address you already used for your administrator account?
- 3. Experiment with user roles.** Change the alternate user account you created in step 2 to a contributor account. If you log in as that user, how does the Dashboard change? Can you create new posts?
- 4. Try to delete the alternate account you created above.** What happens to any posts that you created with that user?

Index

Symbols

: (colon), 169
; (semicolon), 169
{ } (brackets), 172
* (asterisk), 218
/* */ (comment tags), 168, 185

A

Activate Plugin & Run Importer, 122
activating
 Jetpack, 228
 plug-ins, 83-86
 themes, 63-64, 72, 75, 80
 VaultPress, 252-253
Admin Bar
 choosing Widgets from, 87
 disabling, 26
 features of, 25-26
 trying out, 34
 verifying login with, 20
administering network blogs, 220-221
Administrator accounts, 58
Akismet, 162-165, 166, 228
All In One SEO plug-in, 86, 236-238, 254
alternate user accounts, 60
approving reader comments, 160-161
Archives widget, 88
audio files, 146-147
Author accounts, 57, 58
automatic WordPress updates, 29-30
avatars, 46, 157, 158

B

backgrounds
 changing color of, 170
 custom, 79, 80
 using custom images for, 177, 180
backing up, 248-252
 before editing themes, 158
 data, 248-249
 .htaccess file, 216
 preventing theme loss while updating by, 258
 site files, 250-252
 WordPress site, 214
best practices, 235-254
 backing up data and files, 248-252
 coding tips, 239-240
 evaluating site traffic, 246-247
 improving site speed, 242-245
 search engine optimization, 236-238
 sitemaps, 241
blogs. *See also* content; multiple blogs
 administering network, 220-221
 importing from other services, 123
 managing multiple, 213-224
 online resources about, 265-266
 statistics on visits to, 246-247
Blueprint framework, 183
bookmarklets, 41
bulk upgrades for plug-ins, 92-93

C

caching
 clearing browser cache, 256-257
 defined, 242
 options for, 243-245
 troubleshooting, 257

- Cascading Style Sheets. *See* CSS
- categories, 109–111, 128
- color
 - customizing theme, 74
 - modifying background, 170
 - styles for changing text, 169
- comment blacklist, 157
- comment block. *See also* style.css file
 - adding for new theme, 184–186
 - identifying theme in, 202
- comments, 153–166
 - approving reader, 160–161
 - blacklisting terms in, 45
 - configuring site for, 154–157, 166
 - deterring spam in, 55
 - enabling for post or page, 158
 - experimenting with, 50
 - moderating, 155–157, 159–161
 - setting preferences for, 45
 - troubleshooting for, 262
- conditional tags, 200
- contact information, 54
- content, 95–124
 - adding pages, 101–103
 - adding posts, 96–100
 - backing up, 248–249, 254
 - creating new post categories, 111
 - custom post types, 204–207
 - custom taxonomy, 208–211, 212
 - deleting WordPress's default, 27–28
 - editing posts and pages, 104–105, 107–108
 - grouping posts in categories, 109–110
 - Press This browser extension for installing, 116–117
 - QuickPress for adding, 115
 - reverting to previous page, 107–108
 - tags for posts, 112–114
- Continue Reading link, 105
- Contributor accounts, 58
- cPanel
 - accessing Fantastico from, 2
 - illustrated, 4
 - installing WordPress via, 6
 - setting up MySQL database from, 7–8
 - using wildcard subdomains with, 218
- CSS (Cascading Style Sheets)
 - about, 169
 - changing text color with, 169
 - customizing themes with, 168
 - modifying background color, 170
 - styling menu items, 171–172
- custom post types, 203–212
 - about, 203, 204
 - displaying, 206–207
 - setup and registry of, 204–206, 212
- custom taxonomies, 208–211, 212
- customizing. *See also* custom post types
 - backgrounds, 79, 80
 - colors of themes, 74
 - Dashboard features, 24
 - default menus, 126–127
 - headers, 76–78
 - menus, 65
 - themes, 73–75, 80

D

- Dashboard, 21–26. *See also* Admin Bar
 - Admin Bar features, 25–26
 - customizing, 24
 - disabling toolbar, 26
 - features of, 22–23
 - illustrated, 21
 - sidebar menu for, 21
 - trying out, 34
- database
 - backups for, 248–249
 - setting up MySQL, 7–9
 - signing into phpMyAdmin, 9
 - wordpress_* prefix in name for, 8
- date and time formats, 38
- deactivating, plug-ins, 94, 260–261
- declaration blocks, 169
- deleting
 - alternate user accounts, 60
 - “Hello World!” posts, 27, 28
 - menu items, 127
 - Sample Page, 28
 - tags, 114
 - user accounts, 59
- directories
 - choosing for updates, 31–32
 - displaying hidden files in root, 218
 - locating template files in, 183
 - selecting for WordPress installation, 10–11
- displaying
 - custom post types, 206–207, 212
 - custom taxonomies, 211

- invisible files in root directory, 218
- items on menus by hovering, 26, 28
- links to feeds, 233, 234
- menus in widgets, 129
- DOCTYPE declaration, 186–189
- downloading. *See also* uploading
- themes, 72
- updates via FTP client, 30–33
- WordPress, 10–12

E

- editing
 - functions.php file, 175–179
 - .htaccess file, 217
 - images, 139–141
 - menus, 130–131
 - pages, 104–105
 - posts, 104–105, 108
 - reader comments, 160–161
 - theme files, 183
 - themes, 168
 - user profiles, 58
- Editor accounts, 58
- email
 - entering address for WordPress, 37
 - updating address info, 54
 - updating blog via, 41
- embedded media, 150–151, 152, 245
- emoticons, 39
- enabling/disabling
 - Admin Bar, 26
 - avatars, 46
 - comments, 44, 154–157
 - site update services, 40
 - themes available, 223
 - widgets, 90, 94
- eye icon, 120

F

- Fantastico, 2, 4–6
- favicon, 173–174, 180
- Feature Filter, 70, 80
- Feature Pointers, 26
- Featured Image support, 176
- files. *See also* functions.php file; sidebar.php file; style.css file
 - backing up Web site, 250–252

- creating data backup, 248–249, 254
- downloading update, 30–33
- functions.php, 175–179
- ICO, 173
- modifying header.php, 174
- uploading media, 134–138
- used for themes, 182–183
- verifying installation of WordPress, 12
- folders for themes, 202
- fonts
 - changing text, 171
 - using Google, 230–231, 234
- footer.php file, 182, 184, 192
- footers, 67
- formatting posts, 100
- frameworks, about, 183
- FTP client
 - downloading WordPress from, 10–11
 - free, 17
 - updating WordPress via, 30–33
- functions.php file, 175–179, 180
 - adding featured image support in, 176
 - custom background support in, 177, 180
 - modifying for custom headers, 177–179
 - registering custom post type in, 204–206, 212
 - supporting custom menus from, 179
 - using widget code in, 191

G

- gallery placeholder, 144
- getting started
 - admin bar features, 25–26, 34
 - deleting default content, 27–28
 - Help for WordPress, 26
 - updating WordPress, 29–33, 34
 - using Dashboard, 21–25, 34
- Google AdSense, 229, 234
- Google fonts, 230–231, 234
- Gravatars, 158, 166

H

- header.php file
 - adding DOCTYPE in, 186–189
 - building theme with, 182
 - creating and uploading, 184
 - inserting favicon code in, 174

- headers. *See also* header.php file
 - customizing, 74, 76–78
 - modifying functions.php file for, 177–179
 - new images for, 75
 - showing/hiding text for, 74
 - Twenty Thirteen default, 67, 68
- “Hello World!” post, 27, 28
- Help tab, 26
- holding comments, 156
- hosting accounts
 - controlling with cPanel menu, 4
 - signing in to phpMyAdmin, 9
 - supporting multiple blogs, 213
 - using, 3
- hosting companies, 2, 3, 6
- hosting control panel, 4, 6, 7–8
- .htaccess file, 216, 217
- HTML/XHTML
 - adding DOCTYPE declaration in, 186–189
 - adding structure in index.php file, 189–190
 - coding tips for, 239–240
 - creating loop for custom post, 206–207
 - declaration blocks in, 169

I

- ICO file format, 173
- image preview icons, 141
- images
 - adding to post, 97
 - editing, 139–141
 - galleries of, 142–145, 152
 - header, 75, 76–78
 - limiting in each post, 245
 - media settings for, 47–48
 - PNG or JPEG screenshot, 193
 - saving edited, 141
 - selecting background, 79, 80
 - uploading, 134–138
 - using featured, 176
- importing blogs, 121–123
- include tags, 198–199
- Incoming Links module, 23
- index.php file
 - adding XHTML structure in, 189–190
 - building theme with, 182
 - creating and uploading, 184
- installers, 2, 4–6

- installing WordPress
 - other installers for, 6
 - plug-ins, 83–85
 - themes, 71
 - using Fantastico, 4–6
 - using WordPress MultiSite, 214–217
 - WordPress app, 118

J

- Jetpack, 226–234
 - about, 46, 226
 - activating, 228
 - setting up, 226
 - using, 227–228
 - VaultPress, 228, 252–253
 - viewing WordPress.com Stats from, 246–247

K

- keywords
 - comment moderation, 156
 - setting search engine, 237
 - used in spam, 161
- Kitchen Sink icon, 99

L

- links
 - accessing Quick Edit, 103
 - adding post and page, 106
 - displaying RSS feed, 233, 234
 - inserting image from external URL, 138
 - linking with test posts, 124
- logging in
 - to Fantastico, 4
 - to WordPress, 15–16, 20
 - to WordPress app, 118
- loops
 - creating for custom post, 206–207
 - including in index.php file, 189
 - placing template tags within, 201
 - setting up, 202

M

- managing
 - image galleries, 142–145
 - multiple blogs, 213–224

- plug-ins, 93
- tags, 113–114
- users on network, 221–222
- media, 133–152. *See also* images; Media Library; video files
 - adding to post, 97
 - editing images, 139–141
 - managing image galleries, 142–145
 - saving edited images, 141
 - uploading, 134–138
 - using audio and video files, 146–151
- Media Library
 - choosing header image from, 77
 - experimenting with, 152
 - selecting background image from, 79
 - uploading files from, 134–138
- Menu Settings area, 127
- menus, 125–132. *See also* cPanel
 - adding to sites, 129
 - assigning to theme location, 129, 132
 - creating, 128, 132
 - customizing, 65, 126–127
 - deleting items on, 127
 - editing, 130–131
 - hovering over items on, 26, 28
 - options for, 132
 - reordering items on, 132
 - Settings, 36
 - styling items on, 171–172
 - supporting custom, 179
 - unable to access admin, 260–261
- metadata, 168
- moderating comments, 155–157, 159–161
- More tag, 105
- multiple blogs
 - adding plug-ins for, 222
 - administering blog network, 220–221
 - changing default theme for, 222–223, 224
 - managing users on network, 221–222
 - support for, 213
- My Sites link, 217
- MySQL database, 7–8

N

- naming databases, 7, 8
- navigation. *See also* menus
 - sitemaps, 241
 - Twenty Thirteen default, 67

- networked blogs
 - adding, 219
 - administering, 220–221
 - changing default theme for, 222–223
 - knowledge required to run, 213
 - plug-ins for, 222
- notification preference, 156

O

- online resources
 - blogging and site, 265–266
 - book's companion site, 263
 - color, 169, 265
 - theme development, 184
 - troubleshooting, 262
 - WordPress, 264
- opening
 - Posts screen, 28
 - Theme Customizer, 73
- Other WordPress News module, 23

P

- pages. *See also* themes
 - adding, 101–103
 - audio files added to, 147
 - creating, 124
 - defined, 101
 - displaying custom post types, 206–207, 212
 - editing, 104–105
 - embedding video in, 150–151, 152, 245
 - entering contact information for, 54
 - images on, 136–138
 - linking to, 106
 - reverting to previous version, 107–108
 - Sample, 27, 28
 - setting up static front, 50
 - subpages for, 103
 - themes for, 68
 - video files added to, 148–149
- parent categories, 110, 111
- parent pages, 103
- passwords. *See also* username
 - automatically generated, 7–8, 15
 - changing, 16–17
 - Fantastico, 4
 - phpMyAdmin, 9
 - recommendations for, 54
 - sending new user's, 57

- permalinks
 - editing, 97
 - modifying, 50
 - settings for, 49
- photos. *See* images
- php include() function, 194
- phpMyAdmin, 9
- pinging services, 40
- plug-ins. *See also* Jetpack
 - adding and activating, 83–86
 - adding functions with, 81
 - Akismet, 162–165, 166
 - All In One SEO, 236–238
 - deactivating, 94, 260–261
 - finding, 36
 - performance impact of, 242, 254
 - Plugins section of Dashboard, 23
 - theme hook for, 188
 - troubleshooting caching, 257
 - updating, 91–93
 - widgets vs., 82
 - WP Super Cache, 243–245, 254
- posting methods
 - importing from other blogs, 121–123
 - Press This browser extensions, 116–117
 - QuickPress widget, 115
 - using smartphone or tablet, 118–120
- posts. *See also* custom post types; posting methods
 - adding, 96–100, 115–123
 - audio files added to, 147
 - avatars for, 46, 157, 158
 - bookmarklets and email content in, 41
 - configuring display of, 39–40
 - copying/pasting text to new, 254
 - creating new category, 111
 - date and time formats for, 38
 - defined, 96
 - deleting “Hello World!”, 27, 28
 - editing, 104–105, 108
 - embedding video in, 150–151, 152, 245
 - emoticons in, 39
 - formatting, 100
 - gallery pages included in, 145
 - grouping in categories, 109–110
 - images for, 136–138
 - linking to, 106
 - multiple authors for, 57
 - opening Posts screen, 28

- publishing, 98
 - Quick Edit options for, 108
 - RSS feeds for, 232–233
 - showing fewer on page, 245
 - tags for, 112–114
 - test, 124
 - video files added to, 148–149
- Press This browser extension, 116–117
- previewing
 - custom headers, 78
 - posts in WordPress app, 120
 - themes, 71
- profiles
 - changing password for, 17
 - editing, 58
 - setting up, 53–54, 60
- publishing
 - gallery pages, 145
 - pages, 101–102
- publishing posts, 98

Q

- query-string-style tag parameters, 197–198
- Quick Edit
 - accessing link for, 103
 - editing comments in, 160
 - options for posts with, 108
- Quick Use icon, 230
- QuickPress widget, 22, 115

R

- readers. *See* users
- Recent Comments widget, 22, 159
- registering
 - custom post type, 204–206, 212
 - custom taxonomy, 209
 - widgetized sidebar, 191
- reordering images in gallery, 143
- revisions, 107
- RewriteRule, 217, 218
- Right Now widget, 22
- roles for users, 38, 57, 60
- Roots Theme, 183
- RSS feeds, 232–233

S

- Sample Page, 27, 28
- saving
 - custom themes, 75
 - edited images, 141
 - posts from Press This browser extension, 116–117
- scaling images, 140
- screenshot images, 193
- search engine optimization, 236–238
- searching
 - for themes, 70
 - for widgets, 88
- servers
 - compatible with WordPress, 2
 - installing WordPress on, 13–17
 - using own, 3
- setting up WordPress, 1–18
 - creating configuration file, 12–13
 - downloading WordPress, 10–12
 - Fantastico installation steps, 4–6
 - installing WordPress, 10–17
 - logging in to WordPress, 15–16
 - MySQL database setup, 7–9
 - options for, 2
 - overview of, 18
 - using own server or hosting account, 3
- settings
 - accessing from sidebar menu, 35, 36
 - default article, 155
 - Discussion, 44–46
 - influence on Web site, 36
 - Media, 47–48
 - Permalink, 49
 - Reading, 42–43
 - using General, 36–38
 - Writing, 39–40
- showing/hiding
 - content, 105
 - header text, 74
- sidebar menu. *See also* sidebar.php file; widgets
 - about, 21
 - accessing settings from, 35, 36
 - dragging widget to, 88
 - Format, 100
 - plug-in updates from, 91
 - Users page access from, 56
 - viewing custom post types in, 204–206
 - widgetized, 68

- sidebar.php file
 - adding code for widget display, 190
 - building theme with, 182
 - creating and uploading, 184
- site update services, 40
- sitemaps, 241
- smartphone mobile app, 118–120
- spam
 - automatically flagging, 157
 - detering, 55
 - fighting with Akismet, 162–165, 166
 - spotting, 161
- style comment tags, 168
- style.css file. *See also* CSS
 - adding comment in, 184–186
 - adding new classes in, 172
 - building theme with, 182
 - changing text color in, 169, 180
 - creating and uploading, 184
 - making font style changes in, 171
 - metadata within, 168, 180
 - modifying background color in, 170
 - saving and closing, 186
- subpages, 103
- subscribers, 55, 58
- subsites, 224
- Super Admin accounts, 58

T

- tablet mobile app, 118–120
- tag cloud, 112, 113
- tags
 - adding, 112
 - conditional template, 200
 - include, 198–199
 - managing, 113–114
 - PHP parameters for template, 196–197
 - placing template tags within loop, 201
 - query-string-style parameters for, 197–198
 - setting up template file for, 202
 - style comment, 168
 - template, 196–200
 - troubleshooting, 257
- template trace extension, 257
- TEMPLATEPATH variable, 194

- templates
 - about, 194–195
 - default, 193
 - finding functions.php file in list of, 175
 - hierarchy for, 195
 - locating files for, 183
 - troubleshooting editing of, 257
 - using other template in, 198–199
 - using template tags, 196–200
 - working with template files, 194, 195
- test posts, 124
- text
 - copying/pasting to new post, 254
 - font styles for, 171
 - styling color of, 169, 180
- Theme Customizer, 73–75, 80
- theme hook, 188
- themes, 61–80, 167–202. *See also* templates
 - activating, 63–64, 72, 75, 80
 - adding to site, 69–72
 - building blank, 184–193
 - changing network blogs default, 222–223
 - choosing post format, 100
 - creating folder for, 202
 - custom background images in, 177, 180
 - customizing, 73–75, 80
 - default, 62–66
 - DOCTYPE in header.php file, 186–189
 - downloading, 72
 - editing, 168
 - enabling custom headers, 177–179
 - favicons in, 173–174, 180
 - files used for, 182–183
 - frameworks for building, 183
 - including featured image in, 176
 - knowledge required to design, 213
 - locating new, 80
 - loops, 201
 - menus for sites with, 129, 132
 - modifying functions.php file for, 175–179
 - online tutorial for building, 193
 - previewing and installing, 71
 - saving and activating custom, 75
 - searching for, 70
 - stylesheets for, 168–172
 - transferring widgets between, 90
 - uploading images to, 193
 - using template files for, 194–195
 - widget display code for, 190
 - working with template tags for, 196–200

- third-party video hosting, 148
- time and date formats, 38
- titles, 237
- troubleshooting, 255–266
 - blank page when comment submitted, 262
 - further resources for, 262
 - theme lost while updating, 258
 - unable to access admin menus, 260–261
 - updating before receiving update notification, 259
 - when changes don't show up, 256–257
- Twenty Thirteen default theme
 - about, 62
 - customizing, 80
 - options for, 67–68
 - using, 63–66
 - widgetized areas of, 65

U

- updating
 - before receiving update notification, 259
 - configuring settings for, 40
 - plug-ins, 91–93
 - theme lost while, 258
 - via FTP client, 30–33
 - WordPress automatically, 29–30
 - WordPress MU installation, 218
- uploading
 - audio files, 146–147
 - images to themes, 193
 - media files, 134–138
 - .php files, 184
- URL. *See also* links
 - displaying front-end WordPress Web site from, 20
 - inserting image from external, 138
 - permalinks settings for building, 49
 - selecting link's destination, 106
- user accounts, 51–60. *See also* users
 - about, 51
 - accessing information for, 52
 - adding, 56–57
 - changing user roles, 57, 60
 - creating alternate, 60
 - deleting, 59
 - editing profile password for, 17
 - profiles for, 53–54, 58, 60
 - types of, 58

- username
 - accessing account information via, 52
 - creating MySQL, 7
 - entering for phpMyAdmin, 9
 - logging in to Fantastico with, 4

- users
 - allowing comments from, 45, 155–157
 - roles for, 38, 57, 60
 - site visit statistics on, 246–247
 - subscribers vs. visitors, 55

V

- VaultPress, 228, 252–253

- video files
 - adding, 148–149
 - embedding, 150–151, 152, 245

- visitors, 55

- Visual Editor
 - adding content in, 97–98
 - disabling, 53
 - using, 99

W

- Web browsers
 - navigating to new WordPress site with, 7–8
 - Press This browser extensions, 116–117
 - rewriting titles for display in, 237
 - sharing bookmarklets from, 41
 - troubleshooting, 256–257

- Web hosts. *See* hosting accounts

- Web sites. *See also* updating
 - adding menus to, 129
 - adding themes to, 69–72
 - ads for, 229, 234
 - backing up files for, 250–252
 - coding tips for, 239–240
 - evaluating traffic on, 246–247
 - improving speed of, 242–245
 - optimizing keywords for, 236–238
 - sitemaps for, 241
 - third-party video hosting for, 148

- widgets
 - adding display code for sidebar.php file, 190
 - adding functions with, 81
 - default, 89
 - disabling without losing settings, 90, 94
 - displaying menus in, 129

- plug-ins vs., 82
- registering widgetized sidebar in functions.php file, 191
- sidebar for, 68
- transferring between themes, 90
- using, 87–88, 94
- using in Twenty Thirteen footer, 67

- wildcard subdomains, 218

- wordpress_* prefix, 8

- WordPress. *See also* setting up WordPress; settings

- caching options for, 243–245
 - changing passwords, 16–17
 - components of site, 20
 - Dashboard features for, 21–26
 - default content for, 27–28
 - Feature Pointers for, 26
 - Installer screens, 5–6
 - installing, 10–17
 - logging in to, 15–16, 20
 - online resources for, 264
 - requirements for, 2
 - servers compatible with, 2
 - setting up MySQL database for, 7–9
 - template hierarchy for, 195
 - theme development in, 184
 - troubleshooting, 255–266
 - updating, 29–33, 34

- WordPress mobile app, 118–120

- WordPress MU installation, 218

- WordPress MultiSite
 - about, 213, 214
 - Apache mod_rewrite module for, 2
 - changing default theme for, 222–223, 224
 - setting up network for, 214–217
 - updating WordPress MU installation to, 218
 - using, 224

- WordPress Plugin Directory, 82

- WordPress.com Stats, 246–247

- WP Super Cache plug-in, 243–245, 254, 257

X

- XHTML. *See* HTML/XHTML