Introduction to WordPress Training

with examples and hands-on exercises

WEBUCATOR
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LESSON 1
Getting Started and Setup Options

Topics Covered

☑ WordPress versions.
☑ Creating a site using WordPress.

Introduction

WordPress can be used to add a blog to an existing site or to create an entire website.

1.1. Introduction and Setup Options

1.1.1. Versions of WordPress

WordPress versions and options vary by the plan you subscribe to and the location of the installation. Keep in mind site plans can be upgraded and moved to other servers. The combination of simplicity and power makes WordPress a great solution for building blogs and websites, especially sites that allow users to comment on articles.

1.1.2. WordPress Sites

In this course, we will use the free plan provided by WordPress.

We will now create the sample site we will be using in this course. You should follow along and create the site. Later, you will have an exercise in which you create your own site.

1. Browse to https://wordpress.com/ and click **Start your website:**
2. If you already have a WordPress account, log in. If you don’t have an account, create one either by filling out the form with your email address, username and password, or by clicking one of the Continue with buttons:
You should receive an email asking you to verify your email and confirm your account.

3. You will then choose a domain name. It will give you some domain name options, but for this course, you should just use the free wordpress.com domain name:
4. You may use a free account, which is what we will use for this course:

Choose a plan

Pick one that’s right for you and unlock features that help you grow. Or start with a free site.

- Pay monthly
- Pay annually

5. You will get the option to start writing or building. Click **Start writing**.
6. Enter a blog name and tagline:

First, let's give your blog a name

Blog name (optional)
My First WordPress Site

Tagline (optional)
A site for learning WordPress

In a few words, explain what your blog is about.

Click Continue.

7. You will be given some options for starting, but just click the Skip to My Home link:

Skip to My Home

8. You will see your site Dashboard, which will looks something like this:
We will be exploring and configuring this site as we move through the course.

Hosted Setup

Many hosting companies offer WordPress as an open-source add-on available as part of your hosting plan. The hosting company will provide details about installing WordPress. Once installed, you can tie the site to your WordPress login. WordPress.org provides some recommended hosts at https://wordpress.org/hosting/.

Self-installed Setup

WordPress is available to download and install on your own server. You will then need to be sure to install updates. See https://codex.wordpress.org/Installing_WordPress for more details.
Exercise 1: Create a New Site

15 to 25 minutes

In this exercise, you will create a new site to use during the course. You may choose any topic and name.

1. With the sample site we created earlier open, scroll to the bottom of the left-hand navigation and click the Add new site button:

2. Give your site a name:

   ![My site is called Travel Adventures](image)

   Don't worry, you can change it later.

   Continue

3. Choose the free domain:
Then, click the Continue button.

4. Navigate through the designs and choose any one you like:

Choose a design
Pick your favorite homepage layout. You can customize or change it later.

Start from scratch
5. If you are asked which features you need, just click the **Skip for now** button:

6. On the **Select a Plan** page, scroll to the bottom and select the free plan:

7. Your site will be created. You can close any pop-up dialogs that pop up:
8. Return to the Dashboard by clicking the W icon in the upper-left-hand corner and then clicking Dashboard:
You should now have a **Switch Site** option on the top left of the dashboard:

You will use this button to switch between the sample site and the site you have just created for exercises.

**Conclusion**

In this lesson, you have learned about different versions of WordPress and how to create a site using WordPress.
LESSON 2

WordPress Dashboard

Topics Covered

☑ Exploring available features.
☑ Navigating the site.

Introduction

Each WordPress site can be customized and maintained using the Dashboard. Depending on the plan and location of the installation, the options may differ.

2.1. WordPress Dashboard

2.1.1. Features

Once logged in and after you have clicked My Sites, you will have many options available in the left-hand navigation of the Dashboard:
If you have more than one site, please make sure you have the **Dashboard** options for the correct site. The **Switch Site** in the upper left will show all sites you have to choose from. Creating a new site is as easy as clicking **Add New Site** and choosing the correct options.

The options are listed below. The options we cover in this course are in bold.

**Manage**

- **View Site**: View the site as others see it.
- **Plans**: Upgrade or change plans. Each plan has unique features and options.
- **Site Pages**: Create and modify the pages that are part of the site. Note, these pages may not be needed if you are just using WordPress to create a blog for an existing site.
- **Blog Posts**: Create and modify the blog entries.
- **Media**: Upload and maintain any media files.
- **Comments**: Manage comments from others.
- **Feedback**: Manage content from the contact form.
- **Plugins**: Manage and add plugins. Note that this is not available with the free plan.
- **Import**: Import content from another WordPress or other blogging site.

**Personalize**

- **Customize**: Change the look and feel of a site.

**Configure**

- **Sharing**: Use to share parts of the site.
- **People**: Use to add others who can edit and maintain the site.
- **Domains**: Use to associate the site with an existing web address.
- **Settings**: Use to alter main settings.

To edit settings, make sure you are in the Wordpress Admin:

1. Click **My Sites**.

2. Click **Settings**.

3. Edit the **Site Title** and **Tagline**. Click **Save Changes** to commit to changes.

4. Changes complete!

There are many settings to adjust. Some common items are as follows:
In the **General** category:

- Change the site title and tagline.
- Adjust the privacy settings. These settings evolve as technology evolves. Choose the one that best meets your needs.

In the **Discussion** category, you will want to make sure the default article settings meet your needs.

- Review and adjust as needed.
1. **Attempt to notify any blogs linked to from the post.** Leave this selected if you want WordPress to notice when you link to another blog and to attempt to reach out to the owner of that blog to let them know.

2. **Allow link notifications from other blogs (pingbacks and trackbacks).** Leave this selected if you want to be alerted when other blogs link to your site.

3. **Allow people to post comments on new post.** Leave this checked if you want site visitors to be able to post comments on your new articles.

**2.1.2. Navigate to and from Reader**

*Reader* makes it easy for you to follow other WordPress and non-WordPress sites. To toggle back and forth between *Reader* and your *Dashboard*, use the navigation in the upper left.

- **Reader to Dashboard:** The *My Site* link leads to the *Dashboard*, allowing you to configure and manage sites and postings.

- **Dashboard to Reader:** *Reader* is a view that you can use to search and view other blog content.
Exercise 2: Adjust Site Settings

In this exercise, you will adjust site settings for the new site you created earlier. Feel free to just look at the options if you don’t want to make changes.

1. In the General category, change the site title and tagline. Adjust the privacy settings.
2. In the Discussion category, review and adjust as needed.

Conclusion

In this lesson, you have learned:

- How to explore the features available.
- How to navigate the site.
LESSON 3
Posts

Topics Covered

☑ Creating posts.
☑ Organizing and managing posts.

Introduction

A post is an entry into the blog site. These entries are categorized, tagged, and organized. Content is added in the form of text, images, media, and links.

3.1. Categories

Categories are used to create an organization structure that make it easier for visitors to navigate your site.

To create categories:

1. Click Settings. In the Posts category, click Categories
2. Enter a category name and an optional description and click **Add New Category**.

To apply the categories:

1. Click **Posts**.

2. Open the post and hover over the over Title and Choose **Edit**.

3. Under the **Categories** subheading, uncheck **Uncategorized** if it is checked and check one or more relevant categories. Click **Update** to save. Notice that you also have an option to **Add New Category** here as well. If you do add a new category, that category will be available for future blog posts.
To edit the categories:

1. Click **Settings > Posts > Categories**

2. Hover over the category name and choose **Edit**.
3. Type the new category name and click **Update** to save.
Exercise 3: Working with Categories

In this exercise, you will create new categories.

1. Click **Settings > Posts > Categories**.
2. Expand and add as many categories as you wish. We recommend at least three for use in future exercises.

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3.2. Tags

Tags are used to associate more specific keywords with your posts and can be managed per post entry. There are couple of ways to create tags.

❖ 3.2.1. Option 1: Create tag when writing post.

1. When creating the blog entry, you can type in new tags and click **Update** to save. If you type in a tag name that has yet to be created, WordPress will automatically add it to the list for future use.
3.2.2. Option 2: Manage tags in Settings

1. Click Posts > Tags.

2. Click Add New Tag.

3. Enter a Tag name and an optional description and click Add.
3.2.3. Deleting Tags

To delete a tag:

1. Hover over the Delete option for the tag and choose **Delete**.
2. Confirm the deletion by clicking **OK**.
Exercise 4: Working with Tags

In this exercise, you will create new tags on your exercise site.

1. Be sure to switch to the Dashboard of your exercise site.
2. Click Posts > Tags.
3. Create as many new tags as you like.

3.3. Posts

Posts are the heart of the blog. They are the articles you publish to share with your visitors.

To create a new post:

1. Click Blog Posts to add and maintain blog posts. Click Add to create a new post.

2. The post options are listed on the right and editing tools are shown above the area to type the article.
3. Click Add Block.

4. Add an image from the Media (Image).

5. Search for an image by typing in a topic.
6. Click an image (or multiples for a gallery) and click **Insert**.

7. Type in the story. You can use this text for your story.

   Type the story here of that one time that one thing happened when you were going to the one place where you had to do that thing.

   This story will inspire and make others think about the thing and go out and try their own thing.
8. Choose a category and tag. You may choose multiple categories and tags if you think that will help others find your content.

9. Preview to see if you are happy with the blog. Click the Close button in the upper left when you are done.

10. Publish to complete. Choose the date and privacy settings, and then click Publish!
11. The confirmation message shows that everything went well.

12. Click **Close** to return to the Blog Posts management area.

3.3.1. Editing Posts

1. Click the **Toggle Menu** and choose **Edit**

2. The post content is now ready to be changed.
3. Make changes and Preview or Update to save.

3.3.2. Deleting Posts

Deleting posts that are no longer relevant or were added by mistake is easy.

1. Hover over the Toggle Menu and choose Trash.

2. The confirmation message has an option to undo if you change your mind.
Your completed post is now ready for others to read.
Exercise 5: Creating a Post

15 to 25 minutes

In this exercise, you will create multiple posts and assign the categories and tags for better organization. Make sure the following pieces of content are added:

1. An image.
2. Categories and tags that you have previously created.

Don’t be afraid to explore other options. You can always edit and delete posts you do not like!

Conclusion

In this lesson, you have learned how to create, update, delete, and organize posts.
LESSON 4
Comments and Feedback

Topics Covered

☑ Comments.
☑ Feedback.

Introduction

It is useful to know how others think and feel about your blog posts. Comments and feedback can help you get a feel of what types of posts resonate with your audience.

Traditional websites use one or more contact forms to collect information and feedback from users. Blog post comments provide a way for readers to share their thoughts about the specific post itself, rather than the site as a whole.

4.1. Comments

Comments are designed to help increase site engagement. Others can respond to the comment if the options are configured to allow that behavior.

4.1.1. Reviewing Comments

To review comments...

1. Click Comments to review any comments that have been posted.
2. Comments can be approved and made public, marked as spam, and deleted using the trash. Comments, once approved, show up below the post or on the page. Your responses to those comments also show up on the post or page for all visitors to read. And, if they want to, they can join in the conversation.

Let’s try it out.

1. View one of your posts on the sample site and click Leave a Comment.

2. Type in the comment and click Post Comment to complete.

3. In the Dashboard, click My Site > Comments to view all comments that need to be reviewed.
4. Read each comment. Note comments are pending and not yet public.

5. Click **Approve** to make the comment public.
6. The comment is ready for a reply. Click **Reply**.

7. Type in your reply in the **Leave a Reply** area and click **Post Comment** to complete.
Exercise 6: Working with Comments

In this exercise, you will create a comment and review your options.

1. View one of your blog posts on the exercise site you created.
2. Leave yourself a comment.
3. Using the Dashboard, approve the comment and then reply to it using the Reply button.
4. Return to the public site and see if your comment and reply are there.

Note, if you want to see what happens when a new user who is not logged in tries to leave a comment, open a different browser (or open an incognito window), navigate to your blog, and leave a comment.

4.2. Feedback

Site feedback, collected through a contact form, is designed to help with site development. The responses are stored in the Dashboard and not made public. Filling out the contact form is easy and a great way to share details about the site.

To leave feedback:

1. Click Contact on the menu.

2. Fill in details and click Submit to complete.
4.2.1. Viewing Feedback

1. Feedback can be viewed through the Dashboard. Click the Feedback to review the details. Note: If you do not see Feedback as an option in the My Sites area, you may need to click Stats to first get to the full dashboard.

2. Review the feedback details.

Conclusion

In this lesson, you have learned to work with comments and feedback.
LESSON 5
Appearance

Topics Covered

✓ Choosing themes.
✓ Customizing themes.

Introduction

The appearance of the site can be just as important as the content. In WordPress sites, you can customize most aspects of a site’s look and feel using the Dashboard.

5.1. Appearance

We will customize the WordPress theme using the options in the Dashboard. Note that if you have a paid plan for WordPress, you will have more options and can create your own custom themes. The free version has options to change the existing themes using the Dashboard.
5.1.1. Themes

Themes are a set of look-and-feel options you can choose to control the overall design of your site.
5.1.2. Choosing a Theme

1. Using the **Dashboard**, click **Themes** to see the current theme in use.
2. Search for free themes by clicking Free. The results are shown below. Some have helpful labels to show they are easy to modify. Look for the green Beginner band in the upper-right corner of a theme.

3. Click a theme to view the details.
4. If you like what you see, click Activate this design.
5. You then see a choice to learn more or customize.
5.1.3. Modifying a Theme

If you just activated a theme:

1. Click **Customize site**.
2. The options are loaded.

If you are starting from the **Dashboard**:

1. Click **Customize**.

2. Click each category on the left to see the options. The preview of your choices will show on the right.
3. Click **Publish** to save changes.
4. The text of the button will change to “Published” when the choices have been saved.
5. Click **X** in the upper left to return to the **Dashboard**.
6. Click **View Site** to see the changes.
5.2. Adding a Logo and Site Icon

To add a logo to the site:

1. Click **Customize**.
2. Click **Site Identity**.

3. Choose the logo. Note you may need to upload an image if you have not yet done so. Pay attention to the suggested image dimensions. Click **Select** to complete.

To add or change the site icon:

1. Click **Select Image** under the **Site Icon** section.
2. Choose the artwork to use. Note you may need to upload an image if you have not yet done so. Pay attention to the suggested image dimensions. Click Select to complete.

3. Click Publish to complete.

4. To see the results click My Site > Visit Site.

5. Your new items will now be ready.

5.3. Changing Menu Options

Many themes will have options for placing the menu and changing how new items get added to the menu.

To change the Menu Options:

1. Click Appearance > Menus.
2. Add a check mark to the **Automatically add new top-level pages to this menu**. Click **Publish** to commit to any changes.

3. Any new pages will now be added to the top menu.

5.4. Adding a Widget

To add a widget:
1. Click **Widgets**.

2. Click a location to place the widget.

3. Click **Add a Widget** to view the items to pick from. Choose a widget and complete any additional data needed,
Exercise 7: Working with Appearance

15 to 25 minutes

In this exercise, you will play with themes on your exercise site. No right or wrong here!

1. Choose a theme.
2. Customize the theme.

Conclusion

In this lesson, you have learned to choose and customize themes.
Topics Covered

☑️ Creating pages.
☑️ Modifying pages.

Introduction

When you create a site, you have the option to create extra pages. You may not need to do this if you are just using WordPress to add a blog to an existing site.

6.1. Creating Pages

With each site, site pages are created and can be modified at any time. The pages are found by using the Dashboard Site Pages category.

6.1.1. Adding a New Page

To add a new page:

1. Click the Add button next to Site Pages:
2. Choose a Layout.

3. Type in the page content and title.

4. Click Add > Block.
5. Select the image and choose.

6. Select an image and edit the properties.
7. Click **Publish** to see your publishing options.

8. Set a date and privacy setting and then click **Publish** to save.

9. You will receive a confirmation message.
6.1.2. What’s Next

Once your WordPress blog is configured and ready, you can upgrade to a paid plan and receive access to extra features. Your blog can also be linked to an existing site. See https://www.webucator.com/blog/ for an example of a WordPress blog that is part of an existing site.
Exercise 8: Creating a New Page

15 to 25 minutes

In this exercise, you will create some new pages.

1. Use the **Dashboard** to create a few pages with images and text on them. If you don’t need your page anymore, use **Trash** from the **Toggle Menu** to get rid of it.

Conclusion

In this lesson, you have learned to create and modify pages.
LESSON 7
Reader Page

Topics Covered
✅ The Reader page.

Introduction
The Reader page provides a convenient way to explore other people’s blogs.

7.1. Reader Page
The Reader page makes it easy to follow other WordPress blogs and search for articles.

7.1.1. Features
Reader page offer the following conveniences:

- **Followed Sites**: Quickly read the sites you follow in one place.
- **Conversations**: View your conversations.
- **Discover**: View suggestions from WordPress you may like.
- **Search**: Search blog posts for keywords you enter.
- **My Likes**: View items you have marked as Like.
- **Tags**: Add tags to find relevant posts.
- **Write**: Create a blog post.

![Image of a search interface with results]

 Vimeo 7.1.2. Searching for Posts

1. Click **Search** and type in the topic you are wanting to find blog posts about. The results will be listed below, You can also search for sites as well.
Exercise 9: Searching for a Topic Using Reader Page

15 to 25 minutes

In this exercise, you will search for posts.

1. View your reader page and use it to search for a topic. This is a great time to explore the work of others for enjoyment and inspiration.

Conclusion

In this lesson, you have learned to work with the Reader page.