

Introducing Wordpress

At [CALI Conference for Law School Computing 2015](http://conference.cali.org/2015/sessions/introducing-wordpress)

[Emily Barney](#)

Session online description:

<http://conference.cali.org/2015/sessions/introducing-wordpress>

- In this session I'll cover the basics of getting started with WordPress from site setup options, to core features, add-on options, and where to find training and support. I'll mention resources provided by CALI, free and paid resources, and how to choose which option works best for you



Context

- What does WordPress mean to you?

An open source platform that started for blogs, has included static content for some time, and has evolved to be one of the most flexible and user-focused open source platforms to create websites.



WordPress Timeline

Changes to the User Interface

- 2003: WP created

V1.2 [Plugins](#)

V1.5 [Pages](#)

V2.0 [Image Uploads](#)

- 2006: 1st WordCamp
- V2.2 [Widgets](#)
- V2.3 Tagging

V3.1 [Admin Bar](#)

V3.4 [Customizer](#)

- V3.6 Autosave
- 2014: 23%+ of the Web



Who Uses WordPress?

- [WordPress.org Showcase](#)
- [WordPress.org Showcase - by Topic](#)
- [40+ Universities Using WordPress](#)

Accessibility Advertising Apple Art **Arts** Athletes Australia Authors Auto Aviation Babies Band Baseball BBC Worldwide Blog Network Book Books

Brazil ~~BuddyPress~~ **Business** Canada Career **Celebrities** Chile China Cities City **CMS** CNN ~~CNN~~ Money **College**

~~College~~ Lifestyle Comedians Comments Communications **Community** Conference Conversation Corporation **Culture** Custom CSS

Design Developer DIY Dow Jones eBay ecommerce **Education** Electronics Emergency **Entertainment** Events Fashion

Festivals Film **Finance** Fitness **Food** Foreign Policy Fortune ~~Fortune~~ 500 Fox News **France** Gadgets Game show **Gaming** General Motors

German Giga Omni Media Gossip **Government** Great Britain **Health** Hip-Hop Hospital Hosting Hotel Hotels **Humor** India **Innovative**

Instant Messaging **International** Internet Ireland Italy Japan Korea Law Library Lifestyle Lists ~~Macleans~~ Magazine **Magazines**

Maps **Media** Medical Mexico Microsoft Military Money **Movies** MTV Multisite Museum **Music** News Newspaper New York Times

Non-profit Oregon Parenting **People** Personal Pets Photography Photos Plugins Politicians **Politics** Portfolio Portuguese

Productivity **Products** Programming **Publishing** Radio Religion Retail Reviews Search Engine **Shopping** Small Business Social

Network Software Sony Spanish Sport **Sports** **Startups** Style Sweden **Technology** Television TIME ~~Time~~ Inc Tourism

Transportation **Travel** Turkey Turner Classic Movies TV UK University US **Government** Utilities Venture Capital **Video** Wall Street Journal

Weather Web ~~Web~~ Applications Web Browser **Web Design** **Web Development** Web Service Web Standards Wikis Women **Writer** Zoo



Content Strategy

Planning for Long Term Success



Types of Websites

Are you looking for something basic, or will your concept require more advanced options?

Who Will Manage It?

- Are you setting up a site for yourself or for someone else? Multi-user sites can take more planning to keep running.



Types of Content

Consider where your text will come from, how it should fit into your site, and what other multimedia you might want to include.

Know Your Audience

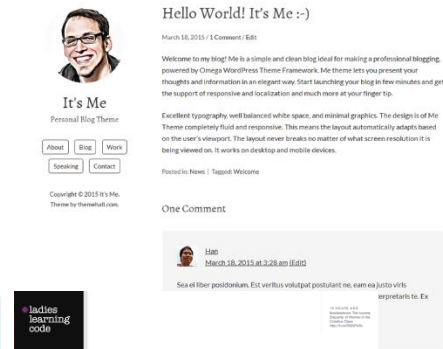
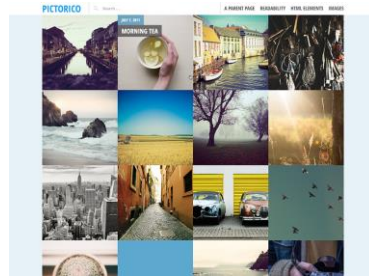
- How much will they know about your topic? Will they come back often? How will they access the site?



Types of Websites

Basic:

- Blog / News / Magazine
- Static website
- Portfolio

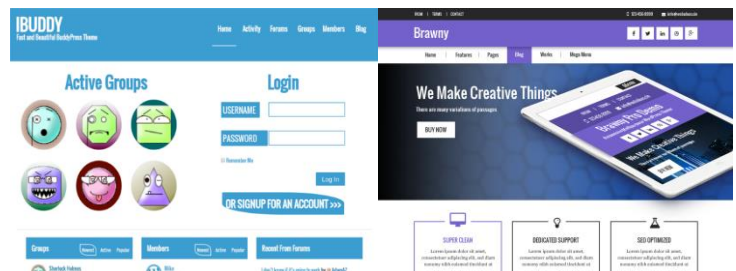


Advanced:

- Social / Membership Sites
- Learning Management System
- E-Commerce

Tutorial:

[Content Modelling: The Most Overlooked Route to a Successful WordPress Site](#)



Who Will Manage It?

- Yourself?
- Another single author?
- Delegated writers/editors?
- Rotating staff or students?



Types of Content



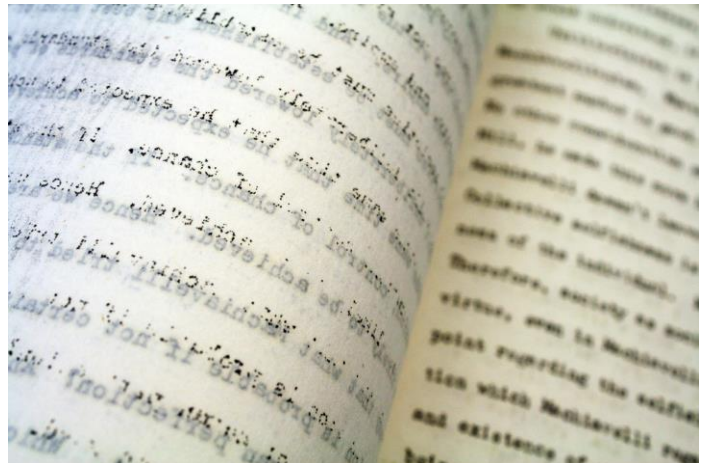
Text content is stored in Posts or Pages. Forms can also be added to text content using plugins like JetPack.

Multimedia - anything from images to audio files, videos, or document files to interactive maps - is usually stored in the Media Library. Some formats can be inserted directly into pages or posts, but others may require

plugins for media _may need to be hosted elsewhere and embedded on your site.

Text Content

- Long-Form or Short?
- Any specialized content?
- Existing Text
- Can you import directly?
- Will it need to be edited for the web?
- New Text
- Who will draft it?
- What timeline will they need



Tutorial:

[Writing for the Web](#) - Slate Magazine

Multimedia Content



- Images
- Documents: PDFs, Word Files, Powerpoints
- Audio
- Videos*
- Maps*

**embeds easier with Jetpack*

Know Your Audience

What are they looking for?

- How much do they already know?
- Will they come back frequently?
- When/How do you think they'll access the site?
 - [responsive design](#) for mobile devices
- accessibility issues



Before You Start!

- Moderating Comments
- Downloading Backups
- Installing Updates
- Reviewing Security
- Search Engine Optimization
- Social Sharing

Managed Hosting:

- Moderating Comments (or turn off)
- ~~Downloading Backups~~
- ~~Installing Updates~~
- ~~Reviewing Security~~
- ~~Search Engine Optimization~~
- Social Sharing



Best Practices

What TO do:

- **Take notes!** Document your settings, customizations, goals, etc. You'll thank yourself
- **Customizing any code?** Comment away! You'll thank yourself.
- **Save backups**

What NOT to do:

- **Edit core code** (anything that isn't in wp-content, basically)
- **Edit your themes directly** (child themes, baby!)



Where Should It Go?

Free Managed Hosting

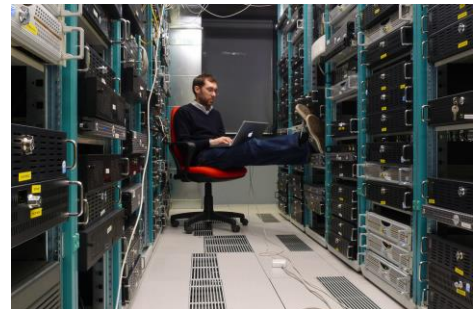
some may offer some additional options with paid upgrades

- WordPress.com
- Classcaster.net
- Edublogs.org

Roll Your Own

Using free WordPress.org Open Source Software

- Local installation
 - [DesktopPress](https://DesktopPress.com)
 - [XAMPP](https://XAMPP.com), [WAMP](https://WAMP.com), [MAMP](https://MAMP.com), etc.
 - Vagrant / [Varying Vagrant Vagrants](https://Varying Vagrant Vagrants.com)
- School servers
- Paid Host
 - [Choosing a Host](#)



Article:

[How Much Does a DIY WordPress Website Cost in 2015?](#)

Hosting Tips

- A few questions to consider/ask when choosing a WordPress hosting company:
- Will their WordPress Installation come with lots of "free" plugins and themes (that may be out of date and clutter up your installation)?
- On shared hosting? How many sites on their network have been blacklisted/infected?
- What versions of PHP & MySQL do they run and how often they update (*some plugins may not be fully functional on outdated versions of PHP*)
- How do they store login credentials and who has access?
- Do they have published security practices?
- Do they offer troubleshooting for WordPress issues?
- use google tools to check your host: <http://www.google.com/safebrowsing/diagnostic?site=hostingcompanywebsite.com>

Core Features

Start with the basics before you customize and/or install add-ons

- Posts & Pages
- Dashboard
- Settings
- Media Library
- User Roles



Posts vs. Pages

Posts are for Updates

- Most recent at the top
- Can be organized using tags & categories
- May be viewed by date or author too
- May use “post formats”
- May use "sticky" to highlight or keep at top of page

Pages are for Static Content

- Can be organized into hierarchy
- No tags or categories
- May not display date or author
- May use custom templates
- Trash: does not permanently delete

Both:

- Save as Draft without publishing
- Set visibility to "Private" - only visible to site users
- Add passwords to content
- Automatic revisions saved.



Dashboard

- Admin Bar
- Full Dashboard
 - Detailed Settings
 - Posts & Pages: Quick Edit
- Simplify:
 - Minimize Toolbar
 - Screen Options
- Editing Tools:
 - Toolbar Toggle
 - Visual vs. Text
 - Post Revisions?



Basic Settings

- Title and tagline
- Home page: posts or page?
- Comments: on or off? (moderated by default)



Permalinks

Why Change?

- Easier Sharing
- Search Engine Optimization
- Usability (dates tell age, words show hierarchy)

Before:

Sample Page

Permalink: http://example.dev/?page_id=2 [Change Permalinks](#) [View Page](#)

Settings Page:

Help ▾

Permalink Settings

By default WordPress uses web URLs which have question marks and lots of numbers in them; however, WordPress offers you the ability to create a custom URL structure for your permalinks and archives. This can improve the aesthetics, usability, and forward-compatibility of your links. A [number of tags are available](#), and here are some examples to get you started.

Common Settings

<input checked="" type="radio"/> Default	<code>http://example.dev/?p=123</code>
<input type="radio"/> Day and name	<code>http://example.dev/2015/06/17/sample-post/</code>
<input type="radio"/> Month and name	<code>http://example.dev/2015/06/sample-post/</code>
<input type="radio"/> Numeric	<code>http://example.dev/archives/123</code>
<input type="radio"/> Post name	<code>http://example.dev/sample-post/</code>
<input type="radio"/> Custom Structure	<code>http://example.dev</code> <input type="text"/>

After:

Sample Page

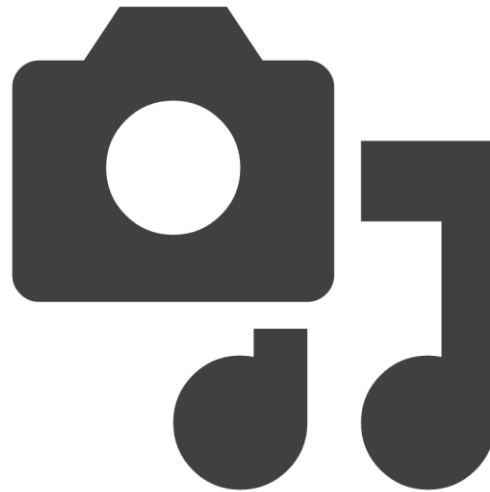
Permalink: `http://example.dev/sample-page/`



Media Library

From the Dashboard:








- Bulk Uploading
- Renaming
- Searching
 - By name
 - By file type



Want More?

[Media Plugins](#) help with replacing files, displaying document file types and more on custom sites.

User Roles

User Role	 Add New Site	 Themes & Plugins	 Settings	 Pages	 Posts	 Comments	 Profile
Super Admin*	Yes	Yes	Yes	Yes	Yes	Yes	Yes+
Admin	N/A	Depends**	Yes	Yes	Yes	Yes	Yes+
Editor	N/A	X	X	Yes	Yes	Yes	Yes
Author	N/A	X	X	X	Own	Yes	Yes
Contributor	N/A	X	X	X	Own (but not publish)	Yes	Yes
Subscriber	N/A	X	X	X	X	X	Yes

*Super Admin only exists on "Multisite" installations where you can install many sites on one WordPress "instance" (database, core files)

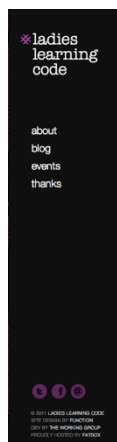
** Admins can install themes and plugins on single sites, but not on multisite installations.

Don't like tables?

- **Network Admin:** full access on multisite (install new sites, themes, plugins)
 - change settings, manage posts, pages, media library, comments, profile)
 - **Admin:** install themes & plugins (on local or self-hosted), change settings, manage posts, pages, media library, comments, profile
 - **Editor:** Posts, Pages, Media Library, Comments, Profile
 - **Author:** Own Posts, Media Library, Comments, Profile
 - **Contributor:** Own Posts, Comments, Profile
 - **Subscriber:** Dashboard Lite: Just Profile
-

Designing Your Site with Themes

- What are your Design Goals?
- Layout Factors
- Choosing a Theme & Previewing with Customizer
- Featured Images
- Widgets
- Responsive Design



We're a collective of women working to empower everyone to feel comfortable learning basic, beginner-friendly technical skills in a social, collaborative way.

mailing list
sign up now to
stay in the loop
sign up

developers
join our email list
to help out
tech help

november 26, 2011
november: intro to
wordpress
view events

18 HOURS AGO
Reputation: The income
Security of income in the
Credit: How
http://www.ladieslearningcode.com

Design Goals

- Introduce Yourself
- Highlight Latest Updates
- Prompt Action
- Tell Stories
- Show Examples

Themes & Customizer

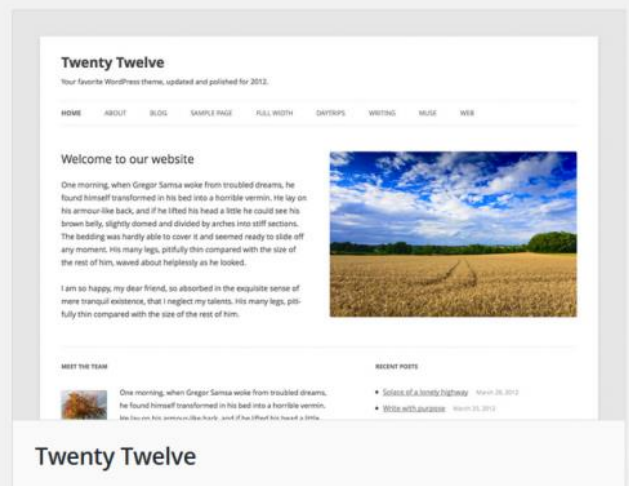
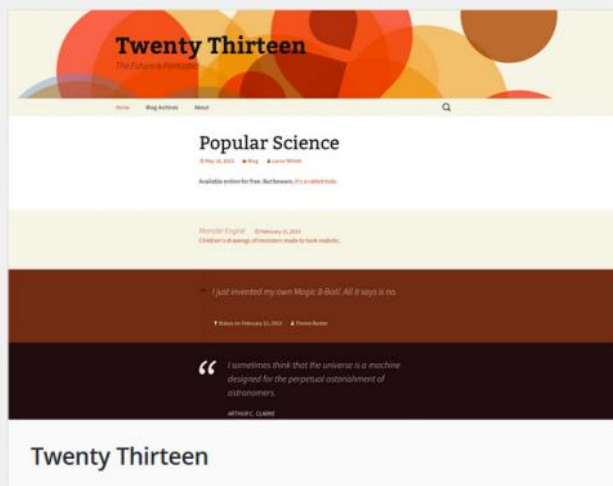
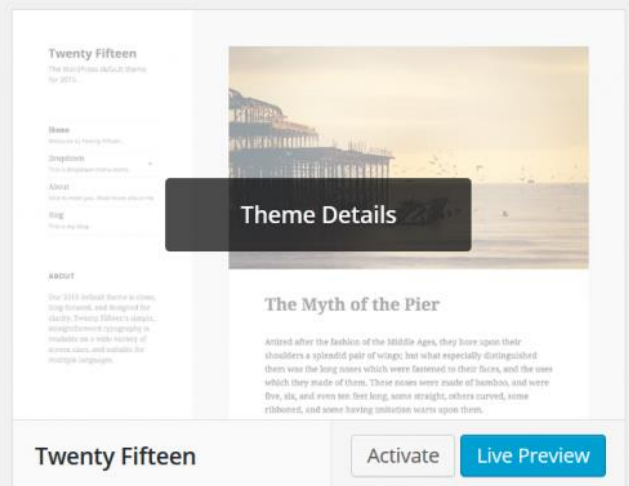
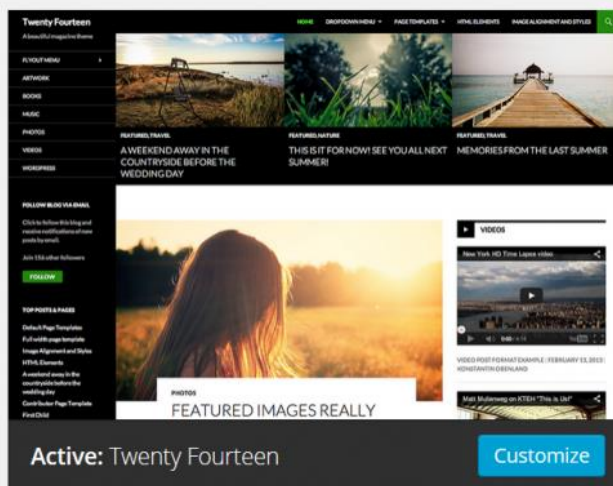
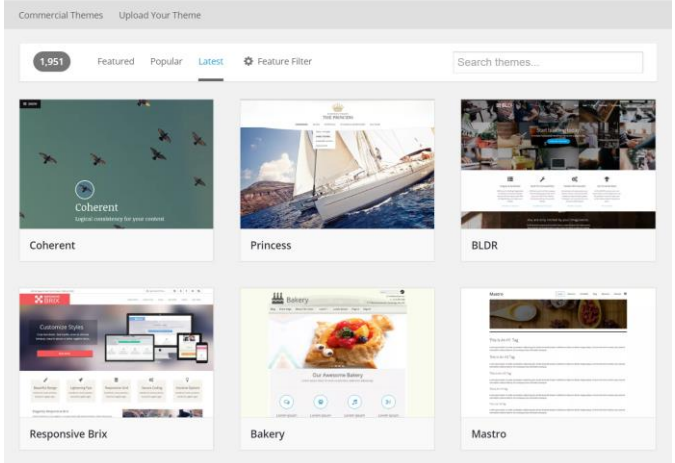
Where do you find Themes?

- **WordPress.com** vs. [WordPress.org](https://wordpress.org)
- Theme Shops
- Theme Frameworks

Concerns:

- Updates
- Security
- Best Practices

Theme Directory



Automattic's Default Themes - 2012, 2013, 2014, 2105

"Tweaking" Themes:

Customizer:

- Common Settings
- What settings don't preview?

Theme Settings:

- WordPress.org themes [have been asked to use the Customizer API](#) in the future
- Paid themes often have very extensive settings pages (can be complicated, hard to export)

Child Themes:

- rearrange content
- make changes not in customizer or settings
- [Child Theme tutorial](#) from Wordpress.org Codex

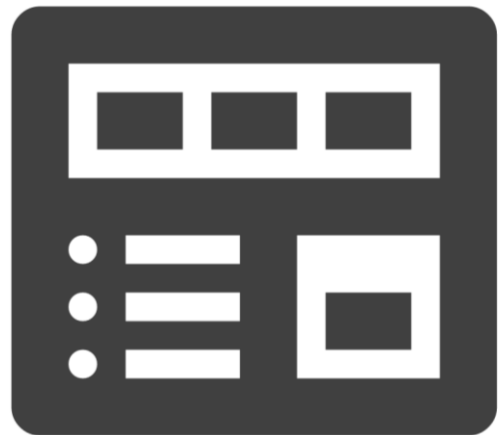
Layout Features

Sections

- Headers
- Menus
- Widgets

Theme Options

- Featured Images
- Excerpt vs. Full Content
- **Note:** The newest themes may use Customizer for some display settings, but other themes still use Settings under Appearance., many also put layout options in page templates, especially if you have a fixed template for the “home” page.



Widgets

Note: In a standard WordPress installation, only admin users have access to the widget management tools.

- Customizable Blocks
- Where do they appear?
- Sidebar/Footer areas
- Home Page
- Other Page Templates
- Adding new Widgets
- Themes
- Plugins
- Selective Display
- Jetpack Plugin



Tip: **Changing themes?** Take notes on your widget settings and content so they are easy to copy into new themes.

Tutorial:

[WordPress Default Widgets](#) - Bob Dunn

Images vs. Featured Images



Featured Images

- Home and/or Archives?
- Top of Post/Page?
- Inline on Post/Page?
- Header on Post/Page?
- Size changes?

Inline Images:

- Standard positioning options
 - Galleries
 - Lightboxes
 - Attachment pages
-

Responsive Design

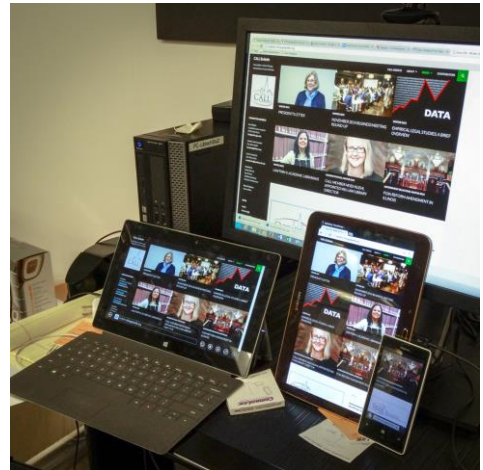
Start with a Responsive Design!

- On WordPress.org:

<https://wordpress.org/themes/tags/responsive-layout/>

Tutorials for Updating:

- Google SEO change: [28% of all WordPress Sites are Affected and What to Do About It.](#)
- [6 steps to Optimizing Your WordPress site for Mobile Devices](#)



Customizing Functionality with Plugins

Plugin Context:

- WordPress.com vs. WordPress.org
 - Admin/Super Admin install privileges
 - Web connection plugins won't work on local installs
 - [Jetpack development mode](#)
-

JetPack: Starter Plugin Pack

Context for JetPack:

- Brings WordPress.com features to WordPress.org
- Not available on Classcaster.net (coming this summer, though!)

- Special debug mode for local installations



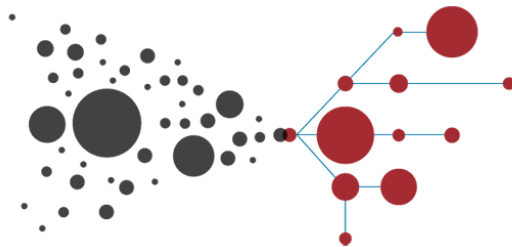
Favorite JetPack Options:

- **Widget Visibility** - *display sidebars on home page only, specific pages, categories, etc.*
- **Extra Sidebars** - *Twitter Widget, Facebook Like Box, RSS Links, Image Widget*
- **Carousel** - allow "lightbox" display of images
- **Tiled Galleries** - autosized galleries
- **Shortcode Embeds** - easy embeds from YouTube, Flickr, Vimeo, etc.



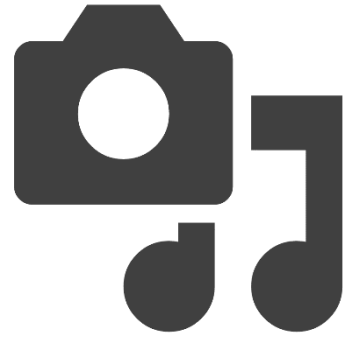
Plugins for Multi-Author Blogs

- [Edit Flow](#)
- [User Switching](#)
- [User Role Editor](#)



Plugins for Media

- [Enable Media Replace](#)
- [My Eyes Are Up Here](#)
- [AJAX Thumbnail Rebuild](#) / [Regenerate Thumbnails](#)
- [Google Doc Embedder](#)



Replace media

Upload a new file

To replace the current file, click the link and upload a replacement.



interconnect/it



control your thumbnails



Plugins for Stats & SEO

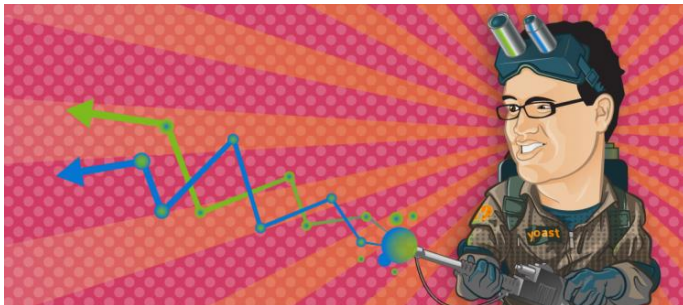
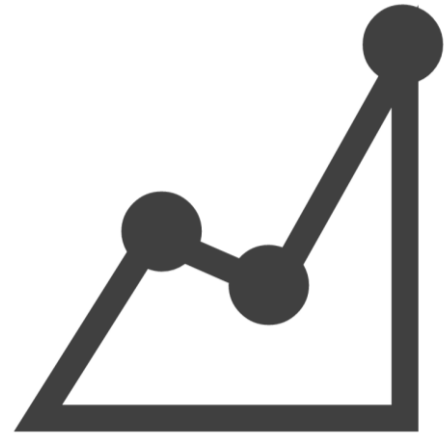
Simple Internal Setup:

- [JetPack's "Wordpress.com Stats"](#)

Advanced:

- [Google XML Sitemaps](#)
- [Google Analytics by Yoast](#)
- [WordPress SEO](#)

Note: You should set up [Google Webmaster](#) and [Google Analytics](#) accounts before starting the advanced tools that tie into them.



Plugins for Back-End Content

- [BrokenLink Checker](#)
- [WP RSS Aggregator](#)
- [Reveal Network Activated Plugins](#)
- [Blog Activity](#) (paid through WPMU)



Reports

Name	Description	Actions
User Comments	Displays comment activity for a user	View Report
Blog Pages	Displays pages activity for a blog	View Report
User Posts	Displays post activity for a user	View Report
Blog Comments	Displays comment activity for a blog	View Report
Blog Posts	Displays posts activity for a blog	View Report
User Pages	Displays page activity for a user	View Report

Plugins for Backups

- [Backup WP](#) (free!)
- [UpdraftPlus](#) (premium version available)
- [VaultPress](#) individual or with [JetPack](#) (subscription)
- [BackupBuddy](#) (different paid licenses, also helps with migration)



Tip: Always test to make sure it will let you restore properly! Find instructions for Manual Backups at the end

The top section features the UpdraftPlus logo on an orange background, with a yellow arrow pointing to a grid of icons representing various backup destinations: Google Drive, FTP, Dropbox, Amazon S3, and a generic cloud icon.

•

The middle section has a red background with the white WordPress 'V' logo on the left. To the right, the text reads: 'Backup, security, and support from the WordPress experts.'

Backup, security, and support from the WordPress experts.

The bottom section shows a flow diagram of the backup process. It starts with a server icon, followed by a red circle labeled 'BACKUP'. This leads to two purple circles labeled 'FILES' and 'DB'. These connect to a blue cloud icon labeled 'FTP' with the text 'more coming soon...' below it. Finally, it leads to a green circle labeled 'RESTORING' with a monitor icon.

Full or custom backup of your site
Easy one click restoration
Schedule your backups
Get notified through the whole process

Plugins for Security

- [Akismet](#) (comments & form spam protection)
- [BruteProtect](#) - now [part of JetPack](#)
- [Sucuri Security](#)
- [Plugin Vulnerabilities](#)
- [Theme Authenticity Checker](#)



BruteProtect

200,000+ protected websites
270,000,000+ blocked attacks

Activity Auditing | File Integrity Monitoring | Remote Malware Scanning | Security Hardening

FREE

Activity Auditing	File Integrity Monitoring	Remote Malware Scanning	Security Hardening
<input type="checkbox"/> HELLO DOLLY	<input type="checkbox"/> ED STAR RATING	<input type="checkbox"/> ED STAR RATING	<input type="checkbox"/> ED STAR RATING
Version 1.0 By Matt Mullenweg View details	Version 1.0.22 By Milian Petrovic Visit plugin site	Version 1.0.22 By Milian Petrovic Visit plugin site	Version 1.0.22 By Milian Petrovic Visit plugin site
number right of your admin screen on every page. This is not just a plugin, it symbolizes the hope and enthusiasm of an entire generation...	The ED Star Rating plugin has a cross-site request forgery (CSRF) injection vulnerability.	The ED Star Rating plugin allows you to set up advanced rating and review system for...	The ED Star Rating plugin allows you to set up advanced rating and review system for...
Settings Deactivate Edit	Settings Deactivate Edit	Settings Deactivate Edit	Settings Deactivate Edit
Version 1.0 By Matt Mullenweg View details	Version 1.0.22 By Milian Petrovic Visit plugin site	Version 1.0.22 By Milian Petrovic Visit plugin site	Version 1.0.22 By Milian Petrovic Visit plugin site

WordPress Training, News & Forums

WordPress Official Content

- [WordPress Codex](#)
- [WordPress.tv](#) - videos from [WordCamps](#) all over, often with links to slides as well
- [WordCamps](#)

Training Sites

- [WP Beginner](#) (aimed toward self-hosted sites)
- [BobWP](#) (offers personal sessions, blogs, videos, podcasts, WordCamp workshop, etc.)
- [WPMU Tutorials](#) (roundups, in-depth, weekend projects, etc.)
- [iThemes free WordPress 101 videos](#)
- [WP101](#) (pay for videos)
- [WP and Legal Stuff](#)



Email Newsletters

- [WordPress Tavern](#) (see sidebar form to subscribe)
- [The WhiP](#) by WPMU DEV
- [wpMail.me](#) (a weekly newsletter)

Facebook Groups

- [Recent List](#) (ca. November 2014)
- [All About WordPress](#)
- [AdvancedWP](#) (moderated carefully, check docs to get started)
- [WordPress, SEO, and Internet Questions](#)

Design & Development Resources

Chrome Tools

- [Inspect Element](#)
- [Mobile Emulator](#)
- [Eye Dropper](#) or [Colorzilla](#)

Free Design Elements

- [Colors](#) (Palette builder)
- [Google Fonts](#)
 - [plugins to add Google Fonts](#)
 - [Adding Google Fonts to your theme](#) (use a child theme!)
- [CSS Button Generator](#) (great for "call to action" links)
- [Icon Archive](#)
- [Flickr Image Search](#)
 - Check out the license filter: *great additions for creative commons, no copyright (public domain) or government works!*



Websites & Web Applications

Want to find out how someone else's site is built?

- [BuiltWith](#)
- [WordPress Theme Analyzer](#)

Want to force your posts/images to share properly on facebook?

- [Facebook Image Debugger](#)

Want to make sure Google can find your site and see who is looking at it?

- [Google Webmaster Tools](#)
- [Google Analytics](#)

Want to make sure very little is ever really lost?

- [Wayback Machine](#)

Maintenance Tips

- Want to roll your own WordPress site so you can customize it fully?
 - You will likely need to learn more about making your own backups if you don't use a plugin, tricks for transferring sites, and a troubleshooting checklist will help you see if any problems are temporary or need further fixing.
-



Backing Up Sites

- There are several backup plugins - free and paid - that can help with backups to make this process more automated.

Note: The most important factor for your backup, regardless of the process, is that you can restore successfully from the files you save.

- Save your backups separately! Duplicate them! Don't leave them all on the same server as your site.

Manual Backup Process:

- Export from WordPress using Tools > Export
- If available on your host server, download complete from phpMyAdmin
- If available on your host server, download complete uploads file in wp-content
- If you have any customized plugins or child themes, download them as well
- No backup? Don't forget that the WayBack Machine may have collected your site if it isn't hidden from search engines.

Migrating Sites

Several of the [backup plugins](#) can help with this process too, but it isn't terribly difficult to do manually. It will help you confirm you know how the site works.

Manual Process:

- Download the export file for your source site from Tools > Export
- Take note of all your settings
- Install same themes, plugins on new site
 - **Note:** Images can be tricky if you don't have full access on your new server and you need to bulk fix links or image sizes.

My fix: Avoid tedious manual link changes by uploading images during the settings changes, before importing content, then edit your DB before you export (backup if you need to continue using your original settings later) to work with the new locations on the new site.

Set up users with correct roles (imported users sometimes become subscribers)

- Import content (*see note above)
- Check: thumbnails, image links, etc.

WordPress Troubleshooting

1. Whatever your WordPress problem, this checklist may help you find a solution - it's cribbed from a major managed WordPress Hosting company.
2. Did you clear your browser cache?
3. Did you try a different browser?
4. Does it work in an incognito/private browser window?
5. Have you checked it from a mobile device on a cellular network?
6. Have you tried logging out and logging back in?
7. Are you logged in as an administrator?
8. Did you read through all the instructions?
9. Did you check the plugin/theme FAQ page?
10. Did you check the plugin/theme forums on WordPress.org?
11. Does it work if you switch to a default core theme?
12. Did you add / update a plugin recently?
13. Do your plugins support the version of WordPress you're using?
14. Did you disable a plugin?
15. Does it work if you deactivate all other plugins?
16. Did you check for [Javascript errors in your browser](#)?
17. Have you changed file permissions on your server?
18. Did you clear your host's cache?
19. Do you have a local site or test site you could check the same scenario in?