

Moving Ahead with WordPress: Under The Hood

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I. Greetings & Introductions

- A. A Little About Me**
- B. A Little About You**

II. A Preview of the Day Ahead

- A. Learn How WordPress Works Behind the Scenes**
- B. Learn to Optimize the WordPress Settings Section**
- C. Using WordPress Tools to Backup Your Content**
- D. All About Adding and Managing Multiple User Accounts**
- E. Explore the WordPress Plugin Section with Several Popular Plugin Choices**
- F. Answer Any Questions You May Have About WordPress**
- G. An Hour Lunch and 2 - 10 Minute Breaks**

III. WordPress File Structure

- A. Your domain name is your main folder on the server**
- B. The server is just another computer connected to the Internet**
 - 1. Difference Between a Server & Client**
 - 2. HTTP Requests**
 - 3. Dynamic Web Pages Sent By Server to Client**
- C. WordPress Installs 3 Primary Folders in the Main Directory**
 - 1. wp-admin - Files that Control the Dashboard**
 - 2. wp-includes - Files that Control Additional Functionality**

3. **wp-content - Files that Control Your Theme & Templates**

D. In the wp-content Folder There are 3 Primary Folders

1. **themes - Where All Your Theme/Template Files Live**
2. **uploads - Where All of Your Media Files and Images Live**
3. **plugins - Where the Plugin Files Live**

E. Your Path to Your Theme Files is:

domain/wp-content/themes/themename

F. It is a Similar Path if Using a Development Instance

G. Create a Development Instance in Folder on Your Domain or Other Domain

IV. WordPress Dashboard Settings

A. General

1. **Site Title & Tagline**
2. **WordPress & Site URLs**
3. **Administrator Email**
4. **Membership & Default User Roles**
5. **Time & Date Settings**
6. **Language Setting**

B. Writing

1. **Default Post Category & Format**
2. **Post via Email**
3. **Update Services**

C. Reading

1. **Home Page vs Blog Roll**
2. **RSS Syndication Feeds**
3. **Search Engine Visibility**

D. Discussion (comments)

- 1. Default Article Settings**
- 2. Other Comment Settings**
- 3. Email Alert Settings**
- 4. Comment Moderation & Blacklisting**
- 5. Avatars**

E. Media

- 1. Default Image Sizes**
- 2. File Organization**

F. Permalinks

- 1. Customize Your URLs and Make Them Pretty**
- 2. Change This Option to Improve Your SEO, Usually to Postname**
- 3. Otherwise Your Website Will Have Links Like yoursite.com/?p=123**
- 4. Common Settings**
 - a. Plain (post id)**
 - b. Day & Name**
 - c. Month & Name**
 - d. Numeric**
 - e. Postname**
 - f. Custom**
- 5. Optional Settings**
- 6. Category Base**
- 7. Tag Base**

G. Plugin Settings

v. WordPress Dashboard Tools

A. Available Tools

- 1. Press This! - Share Content from Around the Web**

2. **Category and Tags Converter**
3. **Most People Decline to Use These Tools**

B. Import

1. **A List of Tools You Can Use to Import Blogs from Other Blog Sites**
2. **These Tools are All Links to Plugin Installs**
3. **The List Includes:**
 - a. **Blogger - Import Posts, Comments & Users from a Blogger Blog**
 - b. **Blogroll - Import Links in OPML Format**
 - c. **Categories and Tags Converter - Convert Existing Categories to Tags or Tags to Categories, Selectively**
 - d. **LiveJournal - Import Posts from LiveJournal Using Their API**
 - e. **Movable Type and TypePad - Import Posts & Comments from a Movable Type or TypePad Blog**
 - f. **RSS - Import Posts from an RSS Feed**
 - g. **Tumblr - Import Posts & Media from Tumblr Using Their API**
 - h. **WordPress - Import Posts, Pages, Comments, Custom Fields, Categories & Tags from a WordPress Export File**
4. **There May be Other Blog Import Tools You Can Search for in Plugins**

C. Export

1. **Creates an XML File with All of Your:**
 - a. **Posts**
 - b. **Pages**
 - c. **Comments**
 - d. **Custom Fields**
 - e. **Menus**
 - f. **Widgets**
 - g. **Users**

2. You Can Upload the XML File into Another WordPress Installation Using the Import Plugin
3. You Can Also Selectively Choose Which Content to Export
4. You Can Use this Tool to Backup Your Database

D. Plugin Settings

vi. WordPress Dashboard Users

A. All Users

1. Lists All Users by Username & Name
2. Use Screen Options Tab to Also Show Email, User Role & Number of Posts
3. Set Number of Users to Show in Screen Options Pagination Settings
4. As an Administrator You Can Add, Edit or Delete Any User Profile

B. Add New Users

1. Create New Users for Your Site
2. Only a Username and Email are Required Fields
3. First Name, Last Name and Website are Optional Fields
4. WordPress Automatically Creates a Strong Password
5. Be Sure to Send Notification to New User via Email
6. Set the Appropriate Use Role for Each User

C. User Profiles

1. Customize the WP Dashboard for Your User Account
 - a. Enable/Disable Visual Editor
 - b. Admin Color Scheme (dashboard only)
 - c. Keyboard Shortcuts
 - d. Enable/Disable Top Toolbar
2. Name Section
 - a. Username - Cannot be Edited

- b. Role - As Administrator You Can Change the Role of Users**
- c. First Name**
- d. Last Name**
- e. Nickname - Required Field**
- f. Display Name - Gives Various Name Combinations as Options**

3. Contact Section

- a. Email - Required Field**
- b. Website - User's Website Address**
- c. Plugins are Available with More Contact Options Such as Facebook, Twitter, etc.**

4. Biographical Section

- a. Biographical Info - Short Description of the User for Author Pages**
- b. Profile Picture - The Avatar is Received from Outside Service**

5. Account Management

- a. New Password - Auto Generate or Set Custom Password**
- b. Do Not Click Generate Password Unless You are Changing a Password**
- c. Sessions - Click to Logout from Other Devices**

D. User Roles

- 1. Subscriber - Can Post Comments (if enabled)**
- 2. Contributor - Can Write New Posts & Submit Them for Approval**
- 3. Author - Can Create & Publish Their Own Posts**
- 4. Editor**
 - a. Can Create New Pages**
 - b. Can Approve Other Users' Posts**
 - c. Can Edit Other Users' Posts/Pages**
- 5. Administrator - Has Access to Edit/Delete Any User or User Content**

E. User Management Plugins

- 1. Plugins are Available to Customize User Roles & Permissions**

2. Because of All the Possible Access Settings it Takes Time to Setup

vii. WordPress Dashboard Plugins

A. What is a Plugin?

1. A Plugin is a group of Code Files that Extends the Functionality of WordPress
2. These Files Will Live in the wp-content/plugins Directory
3. Can Download/Install Many Plugins Through the Dashboard Directly
4. You Can Also Download Plugin ZIP Files to Install Through the Dashboard

B. Installed Plugins

1. Lists all of the installed plugins
2. The Description Includes Version and Author Information
3. You Can Active/Deactivate Plugins
4. Some Plugins Have Settings that You Can Access Directly
5. Usually Includes Links to Plugin Site
6. Update Plugins if Available

C. Add New Plugin

1. You Can Browse or Search for Plugins thst Meet Your Needs
2. These Plugins are Provided Through [WordPress.org](https://wordpress.org)
3. Easily Install Plugins Through the Dashboard
4. You Can Upload Plugin Zip Files from this Page

D. Plugin Editor

1. Another “Scary Code” Place
2. Lists All the Files for Each Plugin
3. Do Nothing Here Unless You Know What You are Doing

E. Plugin Reviews & Security Issues

1. Plugins Can Contain Malicious Software

2. **Always Look at the Reviews and Ratings**

3. **Tidy Repo** is a Good Source of Reviews

F. Popular & Useful Plugins

1. **Black Studio TinyMCE Widget**

a. Adds the Text Editor Used in Posts/Pages to Widgets

b. Free

2. **WordPress SEO by Yoast**

a. Helps You Manage Your Site SEO

b. Free, Paid Pro Version Available

3. **DISQUS - Comments Manager**

a. Helps Manage Your Comments Better

b. Better Spam Control

c. Commentors Can Login with Facebook, Twitter, etc

d. Free - Requires Account Creation at disqus.com

4. **Fast Secure Contact Form**

a. Easily Add a Contact Form to Your Site

b. Free

5. **Gravity Forms**

a. Great Way to Add Sophisticated Forms to Your Site

b. Also Retains Form Data in the Database

c. You Can Manage Your Users and Send them Emails

d. Paid Packages

6. **WP-Sweep**

a. Allows You to Clean Up Unused, Orphaned & Duplicated Data in Your
WordPress

b. Optimizes Your Database Tables

c. Free

7. **User Role Editor**

- a. Makes User Roles & Permissions Changing Aasy**
- b. Edit/Add/Delete WordPress User Roles & Capabilities**
- c. Free (Ad Supported), Paid Pro Version Without Ads**

8. Social Networks Auto Poster

- a. Automatically Publishes Posts from Your Blog to Your Social Network Accounts**
- b. Free, Paid Pro Version Available**

9. WP Super Cache

- a. A Very Fast Caching Engine for WordPress that Produces Static HTML Files**
- b. Free**

10. Easy Twitter Feed Widget

- a. Add Twitter Feeds on Your WordPress Site**
- b. Free**

11. The Custom Facebook Feed

- a. Allows You to Display Completely Customizable Facebook Feeds of Any Public Facebook Page or Group on Your Website**
- b. Free**

12. WooCommerce - excelling eCommerce

- a. A Powerful, Extendable eCommerce Plugin that Helps You Sell Anything**
- b. Many Additional Plugins are Available that Work with WooCommerce**
- c. Free, but Many Companion Plugins are Paid**