Welcome To

Creating Websites with WordPress
January 2016

Presented by:
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President and Founder, YourPresenceOnTheWeb.com

Class 3

Please have a seat, fire up your laptop, connect to the wi-fi and download the class slides

Wifi Connection:
Network name: tomil   Password: agent007

Slides are posted here:
http://YourPresenceOnTheWeb.com/jan16bootcamp
Password: **winter**

Agenda for Class 3

- Quick Review of Week 2
- Migrating a Site to a New Hosting Environment
- Using Plugins
- More about Blogging
- More Ways to Creatively Capture/Display Content
- Using the Media Library
- Managing Users
- Other Settings of Interest
- Closing Remarks

Quick Review of Week 2

- Last week we covered:
  - Maintaining Current Software
  - Wrap Up Creating Custom Menus
  - Setting the Home Page
  - More on Editing Pages and Posts
  - Using Themes
  - Using Widgets

- Any questions about any of this, or the homework?
  - Did anyone try to install the TinyMCE Advanced plugin?

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Migrating a Site to a New Hosting Environment

- Migrating a site must take into account
  - The WordPress file structure
  - The MySQL database
  - The settings in the wp-config.php file
  - Ensuring the URLs in the migrated site point to the right place
  - Adjust the migrated site to include any content not migrated (e.g., themes, plugins, widgets)
- Various tools and techniques can be used to migrate a site
- The best process will depend on:

  - What environment you are migrating from and to

  - How much of the content you want to migrate

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Migrating a Site to a New Hosting Environment

- Three-step process:
    1) Pick and register a domain name
    2) Establish a hosting account
    3) Migrate the Content
- **Step #1:** Pick a domain name that is appropriate for your purposes *AND* that is not already owned by someone else
    - Use **whois.com** to determine if the domain name is available
    - If the domain is available, either:
        – Register the domain name yourself with a domain registration vendor, e.g., Namecheap.com
        OR
        – Register the domain when you create an account with your hosting vendor (see below)

Migrating a Site to a New Hosting Environment, cont'd

- **Step #2:** Establish a hosting account with a reputable vendor
  - **Wordpress.com** – free option is fine for a personal blog or a very simple "marketing brochure" type of site, assuming you can live with the limitations (e.g., limited theme choices, no plugins, no customer service). Can also purchase "upgrades" to support more features, services.
  - **Recommended private hosting vendors** for start-up sites:
    - **InMotion** – use this link for 38% discount off basic plan ("Launch"): https://secure1.inmotionhosting.com/cgi-bin/gby/clickthru.cgi?id=linkomatic
    - **Siteground** – use this link for 60% discount off basic plan ("Startup"): https://www.siteground.com/index.htm?afcode=c18e3b7101c5daa3312c8b42c6ffb91c
    - *O NOT* **use any vendors owned by EIG** – e.g., Bluehost, HostGator,Fat Cow, HostMonster. For complete list see: http://www.webhostingsecretrevealed.net/blog/hosting-updates-news/the-who-what-when-of-endurance-international-group-eig/
  - May need certain "extras" depending on the type of site, e.g., SSL certificate for e-Commerce site

Migrating a Site to a New Hosting Environment, cont'd

- **Step #3:** Migrate the site via one of the following options
    - Option #1: Let the hosting vendor do it (easy, complete, but not universally available)

    - Option #2: Manually export/import the content (moderately difficult, and does not transfer all features/settings)

    - Option #3: Manually transfer the wp-content folder (complete, universally available, but difficult)

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Migrating a Site to a New Hosting Environment, cont'd

- **Step #3 – Option 1**: Let your hosting vendor do the migration
    - Some vendors will migrate a site from another hosting environment to an account in their environment for *free*
    - Restrictions may apply, e.g., it must be a brand-new account, may only support migrations from other vendors using **cpanel**, a limit may exist on the number of free transfers
    - Need to provide the vendor with login credentials for the account where the site is currently hosted
    - **The upside**: you won't have to re-install/configure themes, plugins, widgets, custom menus, etc.
    - **CONTACT ME** if you want to try to go this route

Migrating a Site to a New Hosting Environment, cont'd

- **Step #3 – Option 2**: Manually export/import the content.
  - Downside: *only* content (e.g., pages, posts, media) will transfer
  - **Step #3.1**: Perform a fresh install of WordPress in the new hosting environment – either:
    - a) Utilize "one-click" WordPress install provided by many hosting vendors, **OR**
    - b) Preferred method: follow the "Famous 5-Minute Install" process
      (see: http://codex.wordpress.org/Installing_WordPress#Famous_5-Minute_Install).
      - Requires ability to use FTP, set up MySQL database
  - **Step #3.2**: On the original site, use **Tools => Export** to export the content into an .xml file

Migrating a Site to a New Hosting Environment, cont'd

- **Step #3 – Option 2**: Manually export/import the content
    - **Step #3.3**: On the new site:
        1) Install the **WordPress Importer** plugin and use **Tools => Import** to import the .xml file to the new site. (Be sure to select the option to pull across the media referenced in the pages/post.)
        2) Install the theme and plugins of your choice; configure the theme, custom menu(s), plugins, widgets and other general settings as appropriate

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Migrating a Site to a New Hosting Environment, cont'd

- **Step #3 – Option 3**: Manually transfer the wp-content folder
    - Too advanced for this class

Plugins are....

☐ Fun

☐ Fabulous

☐ Frightening

☐ Full of functionality

☐ Full of security holes

☐ Able to help find security holes

☐ Frustrating

☐ <u>Really</u> Frustrating

☐ Easy to find

☐ Hard to find

☐ Free

☐ Pricey

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Plugins are....

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✅ Free

✅ Pricey

A: All of the above! But don't let that scare you away--
the challenge is worth the effort!

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Using Plugins
What is a Plugin?

"*Plugins can extend WordPress to do almost anything you can imagine.*" - wordpress.org

- Over 42,000 free plugins are available at http://wordpress.org/plugins, with many more premium plugins available from various software vendors
- *Plugins can:* add or modify **visual elements**, add **more controls** to admin panel screens, **enhance performance** of the site, connect the site with **social media**, add **custom post types** and other **database tables**, add features to **page/post editing**....the list is endless!
- When installed and activated, a plugin may:
    - Add one or more widgets
    - Create new menus or sub-menus (e.g., under Settings) in the admin panel
    - Add new attributes/icons on the page/post editing window, or...
    - Change the appearance/operation of your site in some other way

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Page 14 of 44

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Exercise #13: Installing Plugins

NOTE: Installation and activation of plugins is similar to how you manage themes, *except* you can have *many* plugins active at a time, not just one.

1) Navigate to the **Plugins => Installed** to see the plugins that have been installed
2) Note the links at the top that filter the plugins displayed (**All**, **Inactive**, etc)
3) Click on **Add New** button to display the **Add Plugins** screen. As with themes you may either install a plugin directly from wordpress.org, OR upload a plugin file.
4) To install a plugin from wordpress.org use one of the options to find the plugin you want: either **Search** by keyword, or use one of the links (**Featured**, **Popular**, **Recommeded,** or **Favorites**) to filter the list of plugins displayed. Example: search for the plugin named "**TinyMCE Advanced**".
5) When you find the plugin you want, click on the **Install Now** button and click **Okay** to confirm the decision. You will then have the option to **Activate** the plugin. (*Note*: Inactive plugins have no effect on a site, other than to add "bloat" and potential security vulnerabilities.)
6) If you want to install a plugin purchased from a vendor, you will need to first download the .zip file to your hard drive. Then, when you get to the **Install Plugins** screen, click on the **Upload** link. On the next screen, click on **Choose File** to open a file browser to locate and upload the .zip file from your hard drive.
7) Once a plugin is installed, in most cases you will need to configure it in some way in order to use it. ***How you do this varies by plugin.*** Refer to the plugin documentation on wordpress.org or on the plugin vendor site for details.

Using Plugins
A Few Popular Free Plugins

- **Akismet** – rejects spammy user-submitted comments (installed by default)
- **Jetpack by WordPress.com** – a smorgasbord of miscellaneous tools/features brought to you by Automattic, the owner of WordPress.org (need to link your site to a wordpress.com account)
- **Ninja Forms** – a tool to create input forms that can be embedded in a post/page
- **Google XML Sitemaps** – automatically build a sitemap that helps search engines crawl your site
- **W3 Total Cache** – adds an array of caching capabilities that can improve site performance
- **WordPress SEO by Yoast** – tools to help optimize your site for "search engine-friendliness"
- **WP Edit** or **TinyMCE Advanced**– adds a bunch of useful tools to the visual editor menu
- **Image** – adds an easy-to-use widget to display images in the Media Library

Using Plugins
Consider using a <u>Page Builder</u> type of plugin

- Some themes, such as my favorite, Divi from Elegant Themes, include a "page builder" feature, which provides a powerful, flexible way to extend the ability to add, maintain and layout content when creating/editing pages and posts
- If your theme does not include this feature, you can install a plugin that provides it. Some examples:
    - Premium
        – Divi Builder (Elegant Themes)
        – Visual Composer (Code Canyon)
    - Free
        – Page Builder by Site Origin
        – Beaver Builder - WordPress Page Builder

More About Blogging
The Case for Blogging

- Encourages repeat visits by continuously adding **new, fresh content**
- Enhance your perception as a **subject matter expert**
- Enhance your **brand**
- Can allow users to **subscribe** to new content published on the blog
- One of the best ways to **build a sense of community** around your site
- Blogs are a great way to relate **entertaining stories** and **informed opinions**, which people love to read
- Blogs enhance search engine friendliness of the site by reinforcing **keyword phrases** and attracting "**link bait**" (links from other sites)
- You can use blogs posts to **creatively display different types of content**
- Article supporting blogs for business websites:
  http://www.libelcom.com/marketing/designs/why-should-a-business-website-have-a-blog/

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More About Blogging
Using Categories and Tags

- Assigning Categories and/or Tags to your posts can help readers (and search engines) readily recognize and find topics of interest in your site

- Categories and Tags *apply only to posts*, **not** to static pages

- Categories tend to be used to label articles by broad topics; Tags often are used for narrower topics – but there are no "hard rules"

- Categories are managed under **Posts => Categories.** Tags are managed under **Posts => Tags**

- One or more Categories or Tags can be assigned to a given post.
  - If you do categorize/tag posts, it's best to do it immediately when you create the posts
  - By default posts are assigned to "Uncategorized" category

- A reader can see the Categories/Tags assigned to a post when they are viewing the post or blog page

- When a reader clicks on a Category/Tag link, an "archive page" will be displayed containing all posts with the same Category/Tag

More About Blogging
Adding Posts to Menus and Sidebars

- Under **Appearance => Menu** you can create a menu item that points to an ***archive page*** (a.k.a., a "mini-blog") that displays:
  - A single designated post, ***or***
  - All posts assigned to given Category or Tag

- Various Widgets also are available to display filtered lists of posts or "clouds" of Category/Tag names in a sidebar. For example:
  - Archives
  - Categories
  - Category Cloud
  - Tag Cloud
  - Custom Menu

Exercise #14: Creating Menus for Archive Pages
Objective: Add tabs to a menu for archive pages

NOTE: Before you start, make sure you have at least one Category and one Tag defined, with one or more posts assigned to each one.

1) Navigate to **Appearance = > Menus,** then click on the **Screen Options** tab that appears at the top of the screen to expose the panel you can use to show/hide certain fields on screen. Make sure the boxes next to the **Categories**, **Posts** and **Tags** fields are checked, and click on **Screen Options** again to close that panel.

2) To add tabs that link to a "mini-blog pages" for particular categories: In the **Categories** section on the left side of the screen, click the box next to each of the Categories of posts that you want to appear in the menu, click on the **Add to Menu** button, then, on the right side of screen, position the Category tabs where you want them.

3) To add tabs that link to a "mini-blog pages" for particular Tags: In the **Tags** section on the left side of the screen, click the boxes next to each of the Tags that you want to appear in the menu, click on the **Add to Menu** button, then, on the right side of screen, position the Tag tabs where you want them.

4) To add a tabs that point to individual posts: In the **Posts** section on the left side of the screen, click the box next to each of the post articles that you want to appear in the menu, click on the **Add to Menu** button, then, on the right side of screen, position the post tabs where you want them

5) Click **Save Menu**, then navigate to the front-end view of the site to view the results.

More About Blogging
Enabling/Disabling/Moderating Comments

- **Comments** allow visitors to engage in discussions about posts and pages
- Many sites <u>enable</u> **comments for posts,** but <u>disable</u> **comments for static pages**
- To enable/disable comments **by default** when you create a new post or page:
    - Go to **Settings => Discussion** and check/un-check **Allow people to post comments on new articles** (does <u>not</u> affect existing articles)
- To enable/disable comments *on a <u>particular</u> page/post*:
    - On the **Add** (or **Edit**) **New Page/Post** screen, check/un-check the **Allow Comments** box in the **Discussion** section (If necessary, expose the Discussion section via **Screen Options**.)
- Control various features of the commenting process via the **Other comment settings** on the **Settings => Discussion** screen

Most About Blogging
Other Capabilities

- Many plugins are available to enable/leverage/enhance blog content
  - Most notably: **Jetpack** – submit posts by e-mail, automatically submit posts to social media, deliver e-mail notifications for new posts, record the number of "likes" by visitors, allow visitors to share/like posts via social media, and more
- Some themes have special features supporting posts, e.g.,
  - Setting a **Sticky Post** flag on a post forces it to "stick" to the top of the blog page
  - **Post Formats** provide a way to style posts of a certain type in a particular way
- Use the MORE tag to make long posts more reader-friendly
- Set dates in the **future** for publishing posts (or pages)

More About Blogging

- For more general info & guidance about blogging, see: https://codex.wordpress.org/Introduction_to_Blogging

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More Ways to Creatively Capture/Display Content
Embedding Cool Content

- It is possible to embed all manner of other media stored on other sites in a page or a post. A few examples:
  - YouTube videos
  - Vimeo videos
  - Google+ calendars
  - Google+ posts
  - Google maps
  - Flickr photos
- Two different method to perform embeds

  - **Links** to media items are pasted into a page/post in Visual mode
  - **Code snippets** are pasted in Text mode

For more information about embeds:
https://codex.wordpress.org/Embeds

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Exercise #15: Embed a YouTube Video in a Page or Post

1) Open a new or existing post or page. Edit the article in **visual** mode.
2) Open a new tab/window and navigate to YouTube.com and find a video you would like to embed in your article.
3) Click on the **Share** button under the video, click in the field with the URL for the video and copy the value into your paste buffer
4) Return to the post/page editing screen.
5) Place your cursor at the end of the last line of copy before where you want the video to be located, and click the **Enter** key to skip down to a new line. (**NOTE**: The link to the YouTube video must *be on its own line*.)
6) Paste the contents of your paste buffer onto the new line. A preview of the video will appear in the editing window.
7) Click on **Save Draft**, then click the **Preview** button to see the video embedded in the article.
8) Click on the **Play** (right arrow) button to play the video – which can be manipulated in all the same ways as if you were viewing it in YouTube, e.g,. full-screen, pause, volume.

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Exercise #16: Embed a Google Calendar in a Page or Post

1) Open a new or existing post or page. Edit the article in **text** mode.
2) Open a new tab/window, navigate to Google Calendar and login.
3) Go to Calendar Settings, drill down on the calendar you want to display and click on the Calendar Details tab.
4) Click in the field with the embed code, select all the code and copy the code into your paste buffer.
5) Return to the post/page editing screen.
6) Place your cursor at the end of the last line of copy before where you want the calendar located, and click the **Enter** key to skip down to a new line.
7) Paste the contents of your paste buffer onto the new line.
8) Click **Preview** to see how the calendar will display on the page.

NOTE: If the settings for the Google Calendar you are embedding are not already set to allow sharing of the calendar, you will need to make that adjustment, too, before the calendar will display on your website

More Ways to Creatively Capture/Display Content, cont'd

- Creative use of settings in the **Appearance => Customize** menu. (Availability varies by theme.)
    - Custom **Logos** and/or **Favicons** to add brand identity
    - Built-in **Sliders** to display rotating carousels of images w/text captions
    - Ways to modify the default fonts, e.g., font family, color, size, weight
    - Change the default page layout, e.g., add/hide/move sidebars
    - Add custom CSS code

More Ways to Creatively Capture/Display Content, cont'd

- Other cool features supported by some/most themes
  - **Featured Images** can be used to display a custom header image on a static page *or* to highlight a post, e.g., on the blog page
  - Predefined **Page Templates** alter the layout (and sometimes the content) of a page
- Use **Custom Post Types** and **Custom Fields** to maintain and display databases of objects with common elements, e.g., books, recipes, real estate, artwork....
  - Example using the **Pods** plugin to capture/display the product pages at http://nutfieldtech.com

Using the Media Library

- Navigate to **Media => Library** to see a list of all media that have been uploaded.

- From this screen, you can view information media items and/or edit the item, as well as upload new items

  - See which media are attached to articles and which are not;

  - View various attributes of the media (e.g., date/time uploaded, file name, file type, dimensions,

  - Edit certain attributes for each item (e.g., default caption, alt text and description)

  - For images, perform basic edits on the actual image (e.g., re-orient/scale/crop the image)

  - Delete items from the library

Using the Media Library, cont'd

- All manner of media files can be stored in the Library: e.g., images, video files, audio recordings, PDF files, other documents
- Several ways to upload a file into the Media Library:
  - Using theme-specific features in **Appearance**, e.g., custom backgrounds and header images
  - When editing a post/page article:
    - **Add Media** – imbeds the image or a link to the document into the article. Images can be imbedded as individual images, Galleries or Sideshows. A single article may have multiple images/galleries/sideshows imbedded in it.
    - **Set Featured Image** – makes the image available for display by Themes that support featured image.
  - Using the **Media => Add New** screen to directly upload media files

Using the Media Library, cont'd

- Regardless of how a file is added to the Media Library, once it is uploaded it is available for use *in any part of the site* – you don't have to, for example, re-upload an image each time you want to add the image to a page or post
  - *NOTE:* some themes/plugins store media in their own "libraries" outside the WordPress Media Library

For more information about the Media Libarary:
http://codex.wordpress.org/Media_Library_Screen

Managing Users

- Creating additional users enables one to share the responsibilities of maintaining a site, and to share content with selected visitors

- Hierarchy of user roles

  - **Administrator** – has access to <u>all</u> the administration features within a single site, including ability to create other user profiles (**most privileged**)

  - **Editor** – can publish and manage posts including the posts of other users.

  - **Author** – can publish and manage their own posts.

  - **Contributor** – can write and manage their own posts but cannot publish them.

  - **Subscriber** – can only manage their own profile (**least privileged**)

  - Also, *for Multi-site installations only*: **Super Admin** – has access to the site network administration features and all other admin features

  - For more details: http://codex.wordpress.org/Roles_and_Capabilities

Managing Users

- User management is done at the **Users** Dashboard menu
  - **Users => All Users** to display a list of users and to edit/remove user profiles
    (see: http://codex.wordpress.org/Users_Screen)

  - **Users => Add New** to create a new user
    (see http://codex.wordpress.org/Users_Add_New_Screen)

  - **Users => You Profile** to view/edit information in your own user profile
    (see: http://codex.wordpress.org/Users_Your_Profile_Screen)

- *TIP*: Using plugins, like **Restrict Content**, allows one to restrict viewing of content to designated logged-in users

Other Settings of Interest

- **General:** Allow anyone to register themselves on your site, set new user default role, set date/time formats
  (see: http://codex.wordpress.org/Settings_General_Screen)
- **Writing**: set default post category and format, enable post-by-email
  (see: http://codex.wordpress.org/Settings_Writing_Screen)
- **Reading**: control number of posts to show on a blog page, how posts are sent to feeds, search engine visibility
  (see: http://codex.wordpress.org/Settings_Reading_Screen)
- **Discussion**: various settings to control commenting, comment notification and comment moderation
  (see: http://codex.wordpress.org/Settings_Discussion_Screen)
- **Media**: control the max. size of embedded images, designate storage of images in folders by month uploaded
  (see: http://codex.wordpress.org/Settings_Media_Screen)
- **Permalinks**: change how the permalinks are structured
  (see: http://codex.wordpress.org/Settings_Permalinks_Screen)

For more information on the Settings screens:
https://codex.wordpress.org/Administration_Screens#Settings

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Closing Remarks

- Class slides and sandbox sites will remain available *until the end of February*

- If you followed along, practiced the exercises, and did the homework, you learned enough to be **truly dangerous!**

- But there is a lot more to learn – I encourage you to:

  - Learn the elements of good web design style
  - Always remember: new, fresh, relevant, well-written **content is king**!
  - Include a blog in your site and learn how to blog better
  - Cross-promote your site with social and traditional media
  - Become an active, curious explorer of the WordPress universe
  - Join a WordPress Meetup, attend a WordCamp

Closing Remarks
NH WordPress Meetup

- ***Who***: Anyone with an interest in WordPress – all levels of expertise are <u>welcome</u>!
- ***What:*** The WordPress Meetup that's closest to you, with presentations and discussions on topics of interest
- ***Where:*** The Farm Bar & Grille, 1181 Elm St., Manchester
- ***When:*** Generally once a month on the second Tuesday of the month
- ***Why:***
  - Meet and network with fellow 'Pressers
  - Learn/share a bunch of good stuff about developing websites with WordPress, being a freelance developer, etc.
  - Have fun!
  - It's ***free***! (except for any food/drink you order)
- ***How:*** Check it out at http://www.meetup.com/WordPressDevNH
  - Create a Meetup.com account (free!) and join the group
  - Then RSVP to the Meetups as they are announced

Closing Remarks
WordCamps

- Conferences held all around the world to discuss "all things WordPress". See: https://central.wordcamp.org/

- Great for learning/sharing new stuff and networking – highly recommended!

- The next national one will be held in December 2016. See: https://central.wordcamp.org/wordcamps/wordcamp-us/

- Some local ones:

  - WordCamp Boston – Held annually. Next one will be in July. See http://boston.wordcamp.org/

  - WordCamp Maine – See: https://2016.maine.wordcamp.org/

Closing Remarks
If you want more help from me...

- Individualized tutoring
    - Available on an hourly basis at a reduced billing rate ($45/hr for the first three hours)
    - Performed via phone conference using a screen sharing tool
- Advanced Topics in WordPress class & E-commerce Workshop
    - Scheduled on an on-demand basis
- If you decide you don't have the time/inclination to build your own website, I'll build a website for you – which you can enhance/maintain yourself going forward
    - I just did this one for Jeff Murray:
        http://ecbiz187.inmotionhosting.com/~vinta126/vcr/
    - Cost depends on size, scope, features, etc of the site
    - Will provide a free estimate
- Contact me if you are interested in any of these options

Closing Remarks
Other Training Class I Offer

• *Advanced Topics in WordPress course:* Five 2-hour classes to learn more **essential skills and best practices** for creating/maintaining WordPress sites

http://yourpresenceontheweb.com/advanced-topics-in-wordpress/

Site Management and Security	Enhancing the User Experience	Attracting and Converting Traffic
• Options for initially setting up your site; • "Hardening" WP security against would-be hackers/spammers/phishers • Safely upgrading software • Backing up, restoring and migrating sites • Creating a locally hosted test environment • Improving performance	• Themes with advanced built-in features • Great plugins to provide additional functions, features and effects • Safely switching between themes • Effective page layouts • The world of fonts • Using Custom Post Types • Making minor code "tweaks"	• Basic concepts of Search Engine Optimization • Seeing who is visiting your site and how they are using it • Simplified SEO tools and techniques for WordPress • Setting goals and tracking progress.

Closing Remarks
Other Training Classes I Offer

- *Creating Online Stores with WordPress:*
  - A ½-day workshop to learn the basics of creating an online store using Woocommerce, the most popular, very powerful and user-friendly e-commerce shopping cart

    http://yourpresenceontheweb.com/e-commerce-workshop/

Closing Remarks
Other Learning Opportunities

- Books:

    - https://www.elegantthemes.com/blog/resources/top-12-wordpress-books-to-add-to-your-collection

- Blogs:

    - https://www.elegantthemes.com/blog/resources/best-wordpress-blogs

- Online videos:

    - Just Google "WordPress videos about..."

Closing Remarks
The Student Showcase

- The Student Showcase is a page on my website that exhibits websites created by students of the Creating Website with WordPress class

- One your site is "ready for prime time", contact me if you would like me to add it to the showcase

To view the Showcase:
http://YourPresenceOnTheWeb.com/student-showcase

Thank you for giving me the opportunity to share my love of WordPress with you, and best of luck with your future WordPress endeavors!

Jonathan May

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Http://YourPresenceOnTheWeb.com

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