

# Into the Dashboard

## Getting Hands-On with WordPress

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# Welcome Back!

What we're covering today

- Dashboard tour and navigation
- Essential WordPress settings
- Creating your first post
- Working with the Block Editor
- Adding and optimizing images (including alt text!)
- Introduction to plugins
- Introduction to themes
- Brief overview of Full Site Editing
- Q&A

Remember: These slides will be posted online, and this session should be recorded!

# Let's Log In!

Getting into your WordPress Dashboard

- Your sandbox site: <https://shanta.dragonteach.com>
- Dashboard URL: `https://[yoursite].dragonteach.com/wp-admin`

What you'll see:

- Login screen asking for username and password
- Use the credentials you created in Part One (this access should have been emailed to you!)
- Bookmark this! You'll want easy access to your dashboard.

Speaker Notes: Walk through login process. Make sure everyone successfully logs in before proceeding. This is a good time to troubleshoot any access issues.

# Dashboard Tour - Welcome Screen

Your WordPress Command Centre

What you're looking at:

- Left sidebar: Main navigation menu (this is where you'll spend most of your time)
- Top bar: Quick links and your profile
- Main area: Dashboard "home" with widgets showing site activity

The sidebar is organized into sections:

- Posts
- Media
- Pages
- Comments
- Appearance
- Plugins
- Users
- Tools
- Settings

Don't worry - we'll explore these one by one!

Speaker Notes: Point out that the sidebar can be collapsed to give more screen space. Show how to hover over collapsed icons. Mention that the dashboard appearance might vary slightly based on what's installed.

# Settings - General (1)

Let's make your site Canadian!

Navigate to: Settings → General

- Key settings we're changing:
  - Site Title & Tagline:
    - Site Title: Your website name
    - Tagline: Brief description of your site (appears in search results)
  - WordPress Address & Site Address:
    - Usually the same (don't change unless you know what you're doing!)
  - Email Address:
    - Administrative email (where WordPress sends notifications)
  - Site Language: This is important!
    - Change to English (Canada) for Canadian spelling and formatting
  - Timezone: Select America/Toronto (or your Canadian city)
    - This affects when scheduled posts publish

# Settings - General (2)

- Date Format:
  - Choose your preferred format (YYYY-MM-DD is common in Canada)
- Time Format:
  - 24-hour or 12-hour format
- Click "Save Changes" at the bottom!

Speaker Notes: Actually do this live. Show the dropdown for language selection. Emphasize that this is a simple but important step for Canadian sites. Point out that changing the site language doesn't change the Dashboard language unless they want it to.

# Settings - Reading

Control what visitors see first

Navigate to: Settings → Reading

- Key settings:
  - Your homepage displays:
    - Your latest posts (traditional blog style)
    - A static page (more like a traditional website)
    - We'll come back to this when we create pages!
  - Site Visibility:
    - Search Engine Visibility checkbox: Make sure this is **UNCHECKED** for live sites
    - Your sandbox had this checked by default - that's okay for learning
  - Posts per page:
    - How many blog posts show on your blog page
    - Default is 10, adjust based on your needs

Speaker Notes: Explain the difference between a blog-style homepage (latest posts) vs a static homepage (most business sites). Mention we're not setting this now, but they should know where it is.

# Settings - Discussion

Managing comments and interaction

Navigate to: Settings → Discussion

- Key settings to know:
  - Default Post Settings:
    - Allow people to submit comments on new posts
    - Consider turning off if you don't want to moderate comments
  - Comment Moderation:
    - Hold comments for approval
    - Helps prevent spam
    - Can set automatic filters for suspicious content
  - Email notifications:
    - Get notified when someone comments
    - Choose what you want to be notified about
  - Avatar Settings:
    - How commenter profile pictures appear
    - Gravatar is the default system

Speaker Notes: Mention that comment spam is real, and moderation is important. Many sites turn off comments entirely and use contact forms instead. This is a personal choice based on their website's purpose.

# Settings - Permalinks

Making your URLs look good

Navigate to: Settings → Permalinks

- What are permalinks?
- Permanent links - the URL structure for your posts and pages
- Common structures:
  - Plain: ?p=123 (not recommended - not user-friendly)
  - Day and name: /2025/10/10/sample-post/
  - Month and name: /2025/10/sample-post/
  - Post name: /sample-post/ ✓ Recommended!
  - Custom: Create your own structure
- Why "Post name" is best:
  - Clean, readable URLs
  - Better for SEO (search engines)
  - Easier for people to remember and share
  - More accessible

Important: Don't change this after your site is live with content! It will break existing links.

Speaker Notes: Show the different permalink structures. Explain that "Post name" creates URLs like `yoursite.ca/about-us` instead of `yoursite.ca/?p=42`. This is much better for users and search engines. Stress the importance of setting this early and not changing it later.

# Creating Content - Posts vs Pages

Understanding the difference

Examples:

- Posts: News, blog articles, announcements, events
- Pages: About Us, Services, Contact, Privacy Policy

Think of it this way:

- Posts = newspaper articles
- Pages = chapters in a book

Speaker Notes: This is one of the most confusing aspects for beginners. Use real-world analogies. Give examples relevant to their likely websites. Mention that your homepage can be either a blog feed (posts) or a static page. I have a bunch of talks on this very subject, and this is a topic in and of itself.

# Creating Your First Post

Let's build something!

Navigate to: Posts → Add New

What you'll see:

- Title field at the top
- Large content area below (the Block Editor)
- Right sidebar with post settings
- Top toolbar with save/publish options
- The Block Editor (Gutenberg):
- WordPress's modern content creation system
- Everything is a "block" (paragraphs, images, headings, etc.)
- Click the + button to add blocks
- Blocks can be moved, styled, and arranged
- Let's create a sample post together!

Speaker Notes: This is where you start the hands-on demo. Have everyone open Posts → Add New. You're going to build a simple post together, step by step.

# Block Editor Basics (1)

- Understanding blocks
- What is a block?
- Every piece of content is a block:
- Paragraph block (text)
- Heading block (titles)
- Image block (photos)
- List block (bullet points)
- Quote block (pull quotes)
- ...and many more!

# Block Editor Basics (2)

- Adding blocks:
- Click the + button in the top left or in the editor
- Search or browse for the block you want
- Click to add it
- Start typing or adding content
- Common blocks we'll use:
- Paragraph
- Heading
- Image
- List

# Block Editor Basics (3)

- Block toolbar:
- Appears above each block when selected
- Options vary by block type
- Can change alignment, add links, make text bold/italic, etc.

Speaker Notes: Demo adding a few different blocks. Show how to click the + button, search for a block, and add it. Show the block toolbar that appears. Keep it simple - don't overwhelm with all possible blocks.

# Writing Your First Post (1)

Let's create content together!

Step 1: Add a title

- Type in the title field: "Welcome to My WordPress Site"

Step 2: Add a paragraph

- The paragraph block should be ready - just start typing!
- Write something like:
- "This is my first post on WordPress! I'm learning how to create content at WordCamp Canada 2025 in Ottawa."

Step 3: Add a heading

- Click the + button
- Search for "heading" or find it in the list
- Click it to add
- Type: "What I'm Learning"

# Writing Your First Post (2)

## Step 4: Add a list

- Click the + button again
- Find "List" block
- Choose bullet or numbered list
- Add items:
- How to use the WordPress dashboard
- Creating posts and pages
- Adding images with alt text
- Canadian website considerations

Speaker Notes: Do this together, step by step. Make sure everyone is following along. Pause frequently to let people catch up. This is their first experience creating content - make it positive!

# Working with Images (1)

Adding visual content

Navigate to: Media → Add New (or use the Image block directly)

Adding an image to your post:

- Method 1: Upload directly in post
  - Click the + button in your post
  - Find "Image" block
  - Click "Upload" to choose a file from your computer
  - Or "Media Library" to use something already uploaded
- Method 2: Upload to Media Library first
  - Go to Media → Add New
  - Drag and drop or click to upload
  - Then add to post from Media Library

# Working with Images (2)

Image best practices:

- Use high-quality images (but not too large!)
- Recommended max width: 2000 pixels
- Optimize images before uploading (compress them)
- Use relevant, meaningful images
- Always consider copyright - use your own photos or properly licensed images

Speaker Notes: Demo both methods. Show how to upload an image. Mention file size considerations - huge images slow down websites. If possible, have some sample images available for attendees to practice with.

# Alt Text - Accessibility Matters! (1)

## Making images accessible

- What is alt text?
  - Alternative text that describes an image for:
  - People using screen readers (visually impaired)
  - When images fail to load
  - Search engines (helps SEO!)
- How to add alt text in WordPress:
  - Click on your image block
  - Look at the right sidebar (Block settings)
  - Find "Alt Text" field under "Image settings"
  - Type a clear, concise description

# Alt Text - Accessibility Matters! (2)

Writing good alt text:

- ✓ Good: "Golden retriever puppy playing with a red ball in a grassy backyard"
- ✗ Bad: "Image123.jpg" or "dog"
- ✗ Avoid: "Image of..." or "Picture of..." (screen readers already announce it's an image)

When to leave alt text empty:

- Decorative images that don't add information
- Use empty alt text (`alt=""`) - this tells screen readers to skip it
- This is legally required under AODA in Ontario!

Speaker Notes: This is really important! Show how to add alt text in the sidebar. Give examples of good vs bad alt text. Emphasize that this isn't optional - it's both an accessibility and legal requirement. Practice with the image they just uploaded.

# Post Settings Sidebar (1)

Fine-tuning your post

Look at the right sidebar - several sections:

- Status & Visibility:
- Public (everyone can see)
- Private (only site admins)
- Password protected
- Publish date: Schedule for future or backdate
- Categories:
  - Broad classifications for posts
  - "Events," "News," "Tips," etc.
  - Can create new categories here (but I don't recommend it! Plan it first)
  - One post can have multiple categories (but I don't recommend it! Major classification)
- Tags:
  - Specific keywords describing content
  - More granular than categories
  - "wordpress," "beginners," "canada," etc.
  - WordPress recommends 5-7 tags per post

# Post Settings Sidebar (2)

- Featured Image:
  - Main image representing the post
  - Shows in blog listings
  - Appears at top of post (depending on theme)
  - Add just like regular images, but in this sidebar section
- Excerpt:
  - Short summary of your post
  - Used in previews and search results
  - Optional - WordPress can auto-generate one

Speaker Notes: Go through each section. Show how to add a category and tags. Explain that they'll develop their category structure as they understand their content better. For now, just understand what these are.

# Publishing Your Post (1)

Making it live!

Top right corner buttons:

- **Save Draft:**
  - Saves your work without publishing
  - Come back and edit later
  - Good for works in progress
- **Preview:**
  - See what your post looks like before publishing
  - Opens in new tab
  - Shows exactly what visitors will see
- **Publish:**
  - Makes your post live on your site
  - Click once, WordPress asks you to confirm
  - Click "Publish" again to confirm
- **After publishing:**
  - You'll see a success message
  - Option to view the post
  - Can still edit after publishing

# Publishing Your Post (2)

- Post status indicators:
  - Draft (not published)
  - Scheduled (will publish at set date/time)
  - Published (live on site)

Speaker Notes: Have everyone save their post as a draft first. Then preview it. Then publish it! Celebrate - they've just created their first WordPress post! Show them where to view it on the front end of the site.

# Introduction to Plugins (1)

Extending WordPress functionality

What are plugins?

- Add-ons that extend what WordPress can do
- Like apps on your phone
- Thousands available (free and paid)
- Can do almost anything: contact forms, SEO, security, backups, etc.
- Your sandbox includes:
  - WordFence - Security and firewall protection
  - UpdraftPlus - Backup and restoration
  - Akismet - Spam protection (pre-installed with WordPress)
- We will install:
  - WS Forms - Creating contact forms

# Introduction to Plugins (2)

- We'll mention (covered in other sessions):
  - Yoast SEO or Rank Math - Search engine optimization
  - WooCommerce - E-commerce functionality
  - WPML - Multilingual sites (English/French)
  - Gravity Forms - Another forms plugin (alternative to WS Forms)
- Finding plugins:
  - WordPress.org plugin repository (through Dashboard → Plugins → Add New)
  - Always check: ratings, recent updates, active installations, support responsiveness
- Plugin warning:
  - Don't install too many! Each plugin adds code
  - Only install what you actually need
  - Delete unused plugins
  - Keep plugins updated (security!)

Speaker Notes: Show the Plugins menu. Show a plugin that's already installed (WordFence or UpdraftPlus). Briefly demonstrate how to find new plugins through the Add New screen. Emphasize quality over quantity.

# Plugin Spotlight - WordFence (1)

Security matters!

WordFence (pre-installed on your sandbox):

- Firewall protection
- Malware scanner
- Login security
- Real-time traffic monitoring
- Blocks malicious traffic

Basic setup:

- Already configured on your sandbox
- For your own site: install and run through setup wizard
- Enable email alerts for security issues
- Regular scans (free version scans with slight delay)

# Plugin Spotlight - WordFence (2)

Other security practices:

- Strong passwords (use a password manager!)
- Two-factor authentication (WordFence Premium or other plugins)
- Keep WordPress, themes, and plugins updated
- Regular backups (that's where UpdraftPlus comes in!)
- Limit login attempts
- Change default "admin" username

Speaker Notes: Don't dive too deep into WordFence settings. Just show where it is in the dashboard and mention it's working in the background. Emphasize that security is ongoing, not set-and-forget.

# Plugin Spotlight - UpdraftPlus (1)

Backups save lives (and websites!)

UpdraftPlus (pre-installed on your sandbox):

- Backs up your entire WordPress site
- Database and files
- Schedule automatic backups
- Restore with one click
- Free version is powerful!

Why backups are critical:

- Protect against hacking
- Recover from mistakes
- Move/migrate your site
- Peace of mind!

Best practices:

- Backup before major changes
- Store backups off-site (cloud storage)
- Test your backups occasionally
- Automatic daily or weekly backups for active sites

# Plugin Spotlight - UpdraftPlus (2)

Other backup options:

- Many hosting companies include automatic backups
- Jetpack (Automattic's plugin) has backup features
- VaultPress
- BackupBuddy (paid)

Speaker Notes: Show where UpdraftPlus is in the menu. Mention that backing up is one of those "boring but critical" tasks. Many beginners don't think about backups until it's too late. Your hosting might do backups, but having your own is extra insurance.

# Plugin Spotlight - WS Forms (1)

Creating contact forms

WS Forms (pre-installed on your sandbox):

- Drag-and-drop form builder
- Contact forms, surveys, registrations
- GDPR/CASL compliant options
- Spam protection built-in
- Responsive (mobile-friendly)

Creating a basic contact form:

- WS Forms → Add New
- Choose a template or start blank
- Drag fields into form (name, email, message)
- Configure settings (where form emails go)
- Add to page using block or shortcode

# Plugin Spotlight - WS Forms (2)

## Alternative: Gravity Forms

- More advanced features
- Conditional logic
- Payment integration
- Paid plugin (worth it for complex needs)
- Why use forms instead of showing email addresses?
- Reduces spam
- Collects structured information
- CASL compliant (can add consent checkboxes)
- Better user experience
- Can integrate with email marketing tools

Speaker Notes: Briefly show the WS Forms interface. Mention you're not doing a full form tutorial, but they should know this is how you add contact forms. Emphasize forms are better than displaying email addresses directly (spam protection).

# Introduction to Themes (1)

The look and feel of your site

- What are themes?
- Control your website's appearance and layout
- The "front end" - what visitors see
- Can include functionality (but that's really what plugins are for)
- Easy to switch between themes
- Thousands available (free and paid)

Your sandbox is using:

- Twenty Twenty-Five (or current default WordPress theme)
- Clean, modern, block-based
- Fully responsive (mobile-friendly)
- Great for learning!

# Introduction to Themes (2)

Theme components:

- Layout structure (header, footer, sidebar)
- Typography (fonts)
- Colour schemes
- Page templates
- Widget areas

Changing themes:

- Appearance → Themes
- Browse available themes
- Preview before activating
- Activate when ready

# Introduction to Themes (3)

Finding themes:

- WordPress.org theme directory (Appearance → Themes → Add New)
- Premium theme marketplaces (ThemeForest, etc.)
- Theme companies (StudioPress, Elegant Themes, etc.)

Theme selection tips:

- Choose based on your site's purpose
- Check for mobile responsiveness
- Look for accessibility features
- Read reviews and ratings
- Check last update date (recently updated = actively maintained)
- Make sure it's block-editor compatible
- Some functionality may change depending on your theme, so choose one and stick with it

# Introduction to Themes (4)

- Speaker Notes: Navigate to Appearance → Themes and show the installed themes. Show how to preview a different theme without activating it. Emphasize that themes should be chosen carefully but can be changed - your content stays the same. Mention that some themes are better quality than others, just like plugins.

# Theme Customizer (1)

Making your theme your own

Navigate to: Appearance → Customize

- The Customizer allows you to:
- Change site identity (logo, site title, tagline)
- Adjust colours
- Modify typography
- Set homepage and blog page
- Configure menus
- Add widgets
- See changes in real-time preview!

# Theme Customizer (2)

Key sections:

- **Site Identity:**
  - Upload logo
  - Site title and tagline
  - Site icon (favicon - the little icon in browser tabs)
- **Colours:**
  - Background colour
  - Link colours
  - Accent colours
  - Depends on your theme
- **Menus:**
  - Create and manage navigation menus Assign to menu locations (header, footer, etc.)
  - Add pages, categories, custom links

# Theme Customizer (3)

- Widgets:
  - Add content to sidebars and footers
  - Search bars, recent posts, categories, etc.
  - Drag and drop interface
- Homepage Settings:
  - Choose static page or latest posts
  - Select which page is your homepage
  - Select which page shows your blog posts
  - Remember to click "Publish" to save changes!

Speaker Notes: Open the Customizer and show it in action. Make a simple change like site title and show how it updates in the preview. Don't go too deep - just familiarize them with where it is and what it does. Mention this is where they'll spend time making the site look the way they want.

# Full Site Editing (FSE) - Overview (1)

The future of WordPress themes

What is Full Site Editing?

- Edit your entire site using blocks (not just posts/pages)
- Headers, footers, sidebars - all editable with blocks
- Block-based themes required
- More design flexibility
- No coding needed for layout changes
- Navigate to: Appearance → Editor (in block themes)

What you can edit:

- Templates (how different page types look)
- Template parts (headers, footers, etc.)
- Navigation menus
- Entire site layout

# Full Site Editing (FSE) - Overview (2)

Block themes vs Classic themes:

- Block themes: Support Full Site Editing
- Classic themes: Use Customizer and widget areas
- Twenty Twenty-Five (your sandbox theme) is a block theme

We're not diving deep today, but know:

- FSE is becoming the WordPress standard
- It's powerful but has a learning curve
- Classic themes still work fine
- Many new themes are block-based
- The future is blocks!
- Posts and pages: Block Editor ✓
- Site structure: Full Site Editing ✓
- Everything is moving toward blocks

# Full Site Editing (FSE) - Overview (3)

- Speaker Notes: Just show where the Editor is (if using a block theme). Don't do a full tutorial - that's beyond beginner scope. Just make them aware it exists and that's where WordPress is heading. If they're using a classic theme, they won't see this option - that's okay.

# Pages vs Posts - Creating Your First Page (1)

Building static content

We've created a post - now let's make a page!

- Navigate to: Pages → Add New
- The editor looks similar to posts, but notice:
- No categories or tags
- No publish date shown
- Different templates available (depends on theme)
- Page Attributes section (parent pages, page order)

# Pages vs Posts - Creating Your First Page (2)

Let's create an "About" page together:

- Step 1: Title Type: "About Us" (or "About Me" if personal site)
- Step 2: Add content Use blocks just like in posts:
  - Paragraph block: Write about yourself or your organization
  - Heading blocks: Break up sections
  - Image block: Add a photo
  - List block: Highlight key points
- Step 3: Page template (right sidebar)
  - Default Template (most common)
  - Some themes offer: Full Width, Landing Page, etc.
- Step 4: Page Attributes
  - Parent page: Makes this a sub-page of another page
  - Order: Controls order in menus (if using page order)
- Step 5: Publish!
  - Common pages every site should have:
  - About (or About Us)
  - Contact
  - Services (if applicable)
  - Privacy Policy (required for PIPEDA!)
  - Terms of Service (if applicable)

**Speaker Notes:** Create a simple About page together. Keep it brief. The mechanics are the same as posts, so they've already learned most of this. Focus on the differences: no categories/tags, page hierarchy, page templates.

# Creating a Privacy Policy Page (1)

Legal requirement for Canadian sites

Why you need a privacy policy:

- Required under PIPEDA
- Builds trust with visitors
- Required by many payment processors
- Google and other services often require it
- WordPress makes this easy!

Navigate to: Settings → Privacy

WordPress Privacy Policy Generator:

- Click "Create New Page" or select existing page
- WordPress provides a template with standard privacy content
- Edit to match your specific site
- Add details about what data you collect

# Creating a Privacy Policy Page (2)

- Include information about cookies, forms, comments
- Explain how data is stored and protected
- Provide contact information for privacy requests

Important sections to include:

- What personal information you collect
- How you use it
- How you protect it
- Who you share it with (if anyone)
- User rights (access, deletion, etc.)
- How to contact you about privacy concerns
- Information about cookies

Link to your privacy policy:

- Add to footer menu
- Include on contact forms (consent checkbox)
- Link from registration forms

# Creating a Privacy Policy Page (3)

- Get legal advice! This is a starting point, but consider having a lawyer review it, especially if you're collecting sensitive data.
- Speaker Notes: Show where the Privacy Policy helper is in Settings → Privacy. Show the template WordPress provides. Emphasize this is a legal requirement, not optional. Don't be a lawyer - encourage them to get proper legal advice for their specific situation.

# Menus - Organizing Your Navigation (1)

Helping visitors find their way

Navigate to: Appearance → Menus

Creating a menu:

- Step 1: Create a new menu
  - Give it a name (e.g., "Main Menu" or "Header Menu")
  - Click "Create Menu"
- Step 2: Add items to your menu Left sidebar has options:
  - Pages: Check pages to add (About, Contact, etc.)
  - Posts: Individual posts (less common in main menu)
  - Custom Links: External websites, specific URLs
  - Categories: Link to category archives
  - Click "Add to Menu" to add selected items
- Step 3: Organize your menu
  - Drag and drop to reorder
  - Drag right to create sub-items (dropdown menus)
  - Click arrow to edit item (change label, add CSS classes)

# Menus - Organizing Your Navigation (2)

- Step 4: Assign menu location
  - Bottom of page: "Menu Settings"
  - Check which location (Primary Menu, Footer Menu, etc.)
  - Locations depend on your theme
- Step 5: Save Menu

Menu best practices:

- Follow the 3-5-7 rule: No more than 5-7 main items
- Use clear, descriptive labels
- Most important items first (left to right)
- Don't nest more than 2 levels deep
- Test on mobile (hamburger menus)

Speaker Notes: Create a simple menu together with the About page they just created and maybe Home. Show how to drag to reorder and create sub-items. Demonstrate how sub-items create dropdown menus. Emphasize the 3-5-7 principle from your navigation talk.

# Media Library Management (1)

Keeping your images organized

Navigate to: Media → Library

What you'll see:

- All uploaded images, documents, videos
- Grid view or List view
- Search and filter options
- Upload new files
- Best practices for media management:
- Before uploading:
- Name files descriptively (about-team-photo.jpg, not IMG\_1234.jpg)
- Optimize image size (compress without losing quality)
- Use appropriate formats (JPEG for photos, PNG for graphics with transparency)

# Media Library Management (2)

After uploading:

- Add alt text (accessibility!)
- Add title and caption if needed
- Add description for your own reference
- Consider organizing with media library plugins if you have many files

File size considerations:

- Large images slow down your site
- Aim for under 200KB per image where possible
- Use image optimization plugins (Smush, ShortPixel, Imagify)
- WordPress automatically creates multiple sizes

Deleting media:

- Check if it's used anywhere first!
- Deleting from library removes it from posts/pages using it
- Be careful!

# Media Library Management (3)

Supported file types:

- Images: JPEG, PNG, GIF, WebP, SVG (sometimes)
- Documents: PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX
- Audio: MP3, WAV, OGG
- Video: MP4, MOV, AVI (but consider hosting video elsewhere - YouTube, Vimeo)

Speaker Notes: Show the Media Library. Show both grid and list views.

Emphasize the importance of file naming and optimization before uploading.

Mention that huge image files are one of the most common reasons beginner sites are slow.

# Comments - To Enable or Not? (1)

Managing visitor interaction

Navigate to: Posts → (select a post) or Settings → Discussion

Comment considerations:

- Pros of allowing comments:
- Builds community
- Encourages discussion
- Shows your site is active
- User-generated content
- SEO benefits (fresh content)

Cons of allowing comments:

- Requires moderation (time commitment)
- Spam is rampant
- Can attract trolls/negative comments
- Legal liability concerns

# Comments - To Enable or Not? (2)

If you enable comments:

- Use Akismet (pre-installed) for spam filtering Moderate comments before publishing
- Set up email notifications
- Have a clear comment policy
- Respond to legitimate comments

If you disable comments:

- Settings → Discussion: Uncheck "Allow people to submit comments"
- Use contact forms instead for feedback
- Still engage on social media
- Consider alternative engagement methods
- Many business sites disable comments entirely - that's perfectly fine!

Speaker Notes: Show where comment settings are. Show a post with comments (if available). Mention that this is a personal choice based on their goals and available time. Many professional sites don't allow comments. Comments aren't required!

# Users and Roles (1)

Who can access your site

Navigate to: Users → All Users

WordPress user roles:

- **Administrator (that's you!):**
  - Full access to everything
  - Can delete the site
  - Can manage all users
  - Can install/delete themes and plugins
- **Editor:**
  - Can publish and manage all posts and pages
  - Can moderate comments
  - Cannot change themes or plugins
  - Good for content managers
- **Author:**
  - Can publish and manage their own posts
  - Cannot edit others' posts
  - Cannot access pages
  - Good for guest bloggers

# Users and Roles (2)

- Contributor:
  - Can write and manage their own posts
  - Cannot publish (needs approval)
  - Good for guest writers who need approval
- Subscriber:
  - Can only manage their profile
  - Can read content
  - Rarely used on simple sites

## Best practices:

- Don't share admin credentials
- Give people the minimum role they need
- Review users regularly
- Remove users who no longer need access
- Use strong passwords for all users

Speaker Notes: Show the Users screen. Explain that beginners probably won't have multiple users at first, but should understand roles for the future. Emphasize never sharing admin credentials - create separate accounts with appropriate roles.

# Keeping WordPress Updated (1)

Maintenance matters!

Updates are critical for:

- Security patches
- Bug fixes
- New features
- Compatibility with plugins and themes

What needs updating:

- WordPress core
- Themes
- Plugins

Navigate to: Dashboard → Updates

- WordPress makes this easy:
- Automatic updates for minor versions (security/maintenance)
- Notification for major updates
- One-click updates for plugins and themes

Before updating:

- Backup your site! (UpdraftPlus makes this easy)
- Read update notes (especially for major updates)
- Check plugin compatibility if updating WordPress core
- Consider staging sites for testing (advanced)

# Keeping WordPress Updated (2)

Update strategy:

- Keep everything updated promptly
- Security updates are critical
- Minor delays are okay for major version updates (let others test first)
- But don't delay too long!

Auto-updates:

- WordPress core: Auto-updates for minor versions
- Plugins: Can enable auto-updates per plugin
- Themes: Can enable auto-updates per theme
- Be cautious with auto-updates on production sites without testing
- Your sandbox has auto-updates enabled - that's fine for learning!

Speaker Notes: Show the Updates screen. Demonstrate checking for updates. Emphasize the backup-before-updating rule. Mention that updates are usually painless, but backups provide insurance. Note that managed hosting often handles updates automatically.

# Mobile Responsiveness (1)

Your site on phones and tablets

Why mobile matters:

- Over 60% of web traffic is mobile
- Google prioritizes mobile-friendly sites
- Users expect sites to work on all devices
- AODA includes mobile accessibility

Good news: WordPress themes are usually responsive

- Twenty Twenty-Five (your sandbox theme) is fully responsive
- Adapts to different screen sizes automatically
- Navigation becomes hamburger menu
- Images scale appropriately
- Text remains readable

# Mobile Responsiveness (2)

Testing mobile responsiveness:

- Method 1: Browser developer tools
- Chrome: Right-click → Inspect → Toggle device toolbar
- See how site looks on different devices
- Test iPhone, iPad, Android sizes
- Method 2: Your actual phone!
- Visit your site on your phone
- Test navigation
- Try forms
- Check image loading
- Method 3: Online tools
- Google Mobile-Friendly Test
- Responsive Design Checker
- BrowserStack (paid, very thorough)

# Mobile Responsiveness (3)

Mobile considerations:

- Keep menus simple (hamburger menus can hide complex navigation)
- Use readable font sizes
- Make buttons/links large enough to tap (44x44 pixels minimum)
- Avoid horizontal scrolling
- Test forms on mobile (they're harder to fill out)

Speaker Notes: Actually demonstrate checking mobile responsiveness using browser dev tools. Show how the site adapts to different screen sizes.

Emphasize that this is why choosing a good theme matters - responsive design should be built in.

# Basic Troubleshooting (1)

When things go wrong (and they will!)

Common issues and solutions:

- White screen of death:
  - Usually a plugin or theme conflict
  - Access via FTP/hosting control panel
  - Rename plugins folder to deactivate all plugins
  - Rename back and reactivate one by one to find culprit
- Can't log in:
  - Clear browser cache and cookies
  - Try different browser
  - Use password reset
  - Check hosting for login URL changes
- Site is slow:
  - Check image sizes (optimize them!)
  - Too many plugins?
  - Need caching plugin?
  - Hosting issues?

# Basic Troubleshooting (2)

- Changes not showing:
  - Browser cache - try hard refresh (Ctrl+F5 or Cmd+Shift+R)
  - WordPress cache - clear if using caching plugin
  - CDN cache - clear if using CDN
- Plugin conflicts:
  - Deactivate all plugins
  - Reactivate one by one to find conflict
  - Check plugin support forums
  - Contact plugin developer
  - Theme issues:
- Switch to default WordPress theme (Twenty Twenty-Five)
  - If problem goes away, it's theme-related
  - Check theme support/documentation

# Basic Troubleshooting (3)

Where to get help:

- [WordPress.org](https://wordpress.org) forums - free community support
- Happiness Bar - here at WordCamp!
- Plugin/theme support - check their support channels
- Your hosting - they can help with server issues
- Local WordPress meetups
- Hire a professional - for complex issues

Prevention is better than cure:

- Keep backups (UpdraftPlus!)
- Test changes on staging sites
- Keep everything updated
- Don't install too many plugins
- Use reputable themes and plugins

Speaker Notes: Don't scare them! Most issues are minor and fixable. Emphasize that the WordPress community is helpful. Mention the Happiness Bar again. Let them know that everyone encounters issues - it's normal, and there's always help available.

# Next Steps After Today (1)

## Continuing your WordPress journey

- Immediate next steps:
  - Keep practicing on your sandbox site
  - Create more posts and pages
  - Experiment with different blocks
  - Upload and optimize images
  - Try creating a menu
  - Explore theme customization
- When you're ready for your own site:
  - Choose hosting (remember Canadian options!)
  - Register your domain (.ca for Canadian sites!)
  - Install WordPress (usually one-click from hosting)
  - Set up essential settings (like we did today)
  - Choose and install a theme
  - Install essential plugins (security, backup, forms)
  - Create privacy policy
  - Create core pages (About, Contact, Services)
  - Start publishing content!

# Next Steps After Today (2)

Keep learning:

- Attend other WordCamp sessions this weekend
- Join local WordPress meetups (<https://meetup.com>)
- Watch [WordPress.tv](https://WordPress.tv) for recorded sessions
  - I have quite a few on Content Architecture ([categories, tags, pages, posts and more](#))
- Take courses on [Learn.WordPress.org](https://Learn.WordPress.org)
- Follow WordPress blogs and YouTubers
- Practice, practice, practice!
- Other WordCamp Canada sessions to attend:
  - WooCommerce workshop - if selling products/services
  - SEO session - get found on Google
  - Advanced sessions - when you're ready
  - Happiness Bar - get help with specific issues

# Next Steps After Today (3)

- Don't be afraid to:
  - Experiment (on your sandbox!)
  - Ask questions
  - Make mistakes
  - Start over if needed
  - Ask for help
  - Remember: Everyone was a beginner once!

Speaker Notes: Encourage them! Building a website can feel overwhelming, but they've learned the basics today. Remind them that WordPress has an amazing, supportive community. Point them to resources and encourage them to stay connected.

# Canadian WordPress Resources (1)

Stay connected locally

- WordPress Meetups in Canada:
  - Ottawa WordPress Meetup
  - Toronto WordPress Meetup
  - Hamilton WordPress Meetup
  - Vancouver WordPress Meetup
  - Montreal WordPress (bilingual!)
  - London WordPress Meetup
  - And many more across Canada!
- Find meetups at: [meetup.com/pro/wordpress](https://meetup.com/pro/wordpress)
- WordCamps in Canada (and around the world):
  - WordCamp Canada (you're here!)
  - Watch for regional [WordCamps](#)

# Canadian WordPress Resources (2)

Canadian-specific resources:

- Privacy Commissioner of Canada: <https://priv.gc.ca> (PIPEDA info)
- Canadian Anti-Spam Legislation: <https://fightspam.gc.ca> (CASL info)
- AODA resources: <https://www.ontario.ca/page/how-make-websites-accessible> (accessibility)
- CIRA (.ca registry): <https://cira.ca>
- Online communities:
  - WordPress.org forums
  - WordPress Canada Facebook groups
  - WordPress Slack channels

Speaker Notes: Emphasize the value of local community. Meetups are free and welcoming to beginners. Encourage them to join their local group. Mention that you're available for questions via email/social media.

# Key Takeaways (1)

What to remember from today

Part One - Intro to WordPress:

- ✓ WordPress.org (self-hosted) gives you full control
- ✓ Choose hosting carefully (Canadian options available!)
- ✓ Canadian considerations: PIPEDA, CASL, AODA matter
- ✓ Set language to English (Canada)
- ✓ Security and backups are essential

# Key Takeaways (2)

## Part Two - Into the Dashboard:

- ✓ Settings are important - configure them right away
- ✓ Posts are dynamic, Pages are static
- ✓ Everything is a block in the editor
- ✓ Always add alt text to images (accessibility!)
- ✓ Plugins extend functionality (but don't overdo it)
- ✓ Themes control appearance
- ✓ Keep WordPress, themes, and plugins updated
- ✓ Mobile responsiveness matters
- ✓ Help is available - use it!
- The most important takeaway: You CAN do this! WordPress is designed for people like you.

Speaker Notes: This is the summary slide. Hit the main points without going into detail. Make it encouraging. They've learned a lot today - acknowledge that!

# Resources - All in One Place (1)

Bookmark these!

- WordPress.org – <https://wordpress.org>
- Learn WordPress – <https://learn.wordpress.org>
- WordPress.tv – <https://wordpress.tv>
- Support Forums - <https://wordpress.org/support>
- Theme Directory - <https://wordpress.org/themes>
- Plugin Directory - <https://wordpress.org/plugins>

Canadian Legal/Compliance:

- PIPEDA - <https://priv.gc.ca>
- CASL - <https://fightspam.gc.ca>
- AODA - <https://ontario.ca/laws/regulation/r11191>

# Resources - All in One Place (2)

## Tools Mentioned:

- Security - WordFence (<https://wordpress.org/plugins/wordfence> )
- Backups - UpdraftPlus (<https://wordpress.org/plugins/updraftplus>)
- Forms - WS Forms (<https://wordpress.org/plugins/ws-form>) or Gravity Forms (<https://gravityforms.com>)
- Multilingual - WPML (<https://wpml.org>)
- Image Optimization - Smush, ShortPixel, Imagify

## Canadian Hosting:

- Web Hosting Canada - <https://whc.ca>
- HostPapa - <https://hostpapa.ca>
- WPCloud
- Hosting.ca

## Books:

- Information Architecture: Blueprints for the Web
- Don't Make Me Think (Steve Krug)

Speaker Notes: This is a reference slide they can photograph or refer to later when slides are posted online. Don't read through all of it - just mention it's there for their reference.

# Final Thoughts (1)

Before we wrap up

You've learned a LOT today:

- WordPress basics and Canadian considerations
- Dashboard navigation
- Creating posts and pages
- Working with the Block Editor
- Images and accessibility
- Plugins and themes
- Settings and configuration

This is just the beginning:

- WordPress has SO much more to explore
- Take it step by step
- Don't try to learn everything at once
- Build on what you learned today

Remember:

- Your sandbox site is available into the new year
- Keep practicing!
- Attend other sessions

# Final Thoughts (2)

- Visit the Happiness Bar
- Connect with the community
- The WordPress community is amazing:
- Welcoming to beginners
- Always willing to help
- Passionate about open source
- Friendly and supportive
- You're now part of that community. Welcome!

Speaker Notes: Make this encouraging and warm. They've absorbed a lot of information. Remind them it's okay to feel overwhelmed, and that learning happens over time. The community is there to support them.

# Keep in touch

Stay in touch with me:

- Twitter/Bluesky/Instagram: @ShantaDotCa
- Email: [shanta@shanta.ca](mailto:shanta@shanta.ca)
- Website: <https://shanta.ca>