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- 16 Tips and Tools for WordPress
- 17 Managing Multiple Blogs
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About the Author

This is the second book from **Tris Hussey**, a long-time technologist, blogger, and writer, who started off as an academic and found tech support much more to his liking. After picking up blogging on a whim in 2004, he quickly became Canada's first professional blogger and a leading expert in business blogging. He has been a part of several Web 2.0 startups, from blogging software to blogging agencies.

In addition to writing and consulting, Tris gives workshops and teaches classes on social media, blogging, podcasting, and WordPress at the University of British Columbia and The British Columbia Institute of Technology.

Tris lives and works in beautiful Vancouver, British Columbia.

Dedication

For Sheila, who encouraged and supported me throughout writing this book, before the first one was done!

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Introduction

In the beginning, there was b2 (also known as cafelog), and an 18-year-old programmer by the name of Matt Mullenweg used this blog platform to document his trip to Washington DC. Then in late 2002, b2's development stopped. In January 2003, Matt teamed up with Mike Little to announce that they were going to continue development of b2 with a fork from the original source code. In May 2003, WordPress 0.70 was launched, and the rest is now part of Internet lore. Matt, it is worth noting, was a freshman at the University of Houston when he started working on WordPress. As of September 2009, there were roughly 202 million websites using WordPress, and WordPress (or WP, as most people call it) is now considered the leading open-source blog platform in use.

I don't remember when I first met Matt in person, but I'm happy to count him as a friend. Matt is one of those scary brilliant people who just *knows* things, and he is also one of the nicest people I know.

I didn't use WordPress as my primary (and essentially exclusive) blog engine right away. Like many bloggers, when I started my first blog in the spring 2004, I set it up on Blogger (owned by Google). Within a few months, I outgrew Blogger and moved on to what seemed to be the powerhouse blog engine of the time: Blogware. It had features that WordPress wouldn't have for another year, and I remember talking with Matt in the summer 2005, and telling him I wouldn't switch to WordPress because it lacked the features I needed. I remember showing him some of the tools I used to tweak my blog's layout in Blogware—features that later became part of WordPress. (I don't claim that I inspired Matt to put those in; I just find this to be interesting.) Some four years later, I wouldn't use anything *except* WordPress as a blog engine, and I now teach people how to use WordPress to build "regular" websites.

This book is intended to be a step-by-step guide to using WordPress (hence the title), with enough detail to have you well on your way to manage most WordPress blogs. I'm not going to claim that it is an *exhaustive* tome on all things WordPress;

I'm leaving that task to my geekier friends (many of whom I will be citing and interviewing for this book). The book includes screenshots of how you do everything, from installing WordPress to fixing it when it's broken, and also includes podcast interviews on other topics related to WordPress and the larger WordPress community.

Beyond its flexibility and ease of use, one of the biggest reasons I use WordPress is the worldwide community of users who contribute to the platform through plugins, themes, and help, and even how WordPress works. This community is one of the strengths of WordPress because the wealth of talent and imagination of its users keeps pushing the core developers to constantly improve WordPress.

For the last several versions of WordPress since version 2.1, the user community has recommended what new features should be added to WordPress. It's the developers who put things in place, but the community helps set the priorities.

Before I continue into an overview of WordPress and this book, I should mention that this book is written using the latest version of WordPress available (3.0). By the time this book is in your hands, more updates will undoubtedly have been made to WordPress. Working with some of the key WordPress developers, I have written this book as "future proof" as possible, but that said, I will post updates on www.usingwordpressbook.com so that you can always have access to the latest information and changes to WordPress.

What Is WordPress?

So, you ask, what *exactly* is a blog engine, and what makes WordPress a blog engine? First, a blog simply is a website made up of individual articles or *posts*, where the posts are listed on the home page with the newest article at the top of the page (in reverse chronological order). A blog engine is the software that runs on a web server, not your machine at home, which makes a blog work.

Most blog engines work by combining scripts and code to display the pages and a database to store the articles and other settings. Blog engines also tend to use *templates or themes* to style how the web pages look to visitors. Altogether, that's the blog engine, and WordPress does all of that (and a few other tricks as well). This is a complicated way of saying that WordPress is a *content management system* (or CMS).

Not long ago, CMS-based websites were "the next big thing" online. Many large companies used them for their websites because they could enable people to author content, without having to learn HTML (the coding that makes the Web what it is) or worry that someone would "break" the website accidentally. A CMS

with the features, power, and flexibility of WordPress would cost tens, if not hundreds, of thousands of dollars. Now, WordPress is available as free, open-source software that you can download and install in minutes. Everything starts at WordPress.org (Figure IN.1) where you can download WordPress to install it (we'll get there, don't worry), download plugins and themes to extend WordPress' built-in capabilities, and start to learn all things WordPress. This is the hub for the WordPress community.

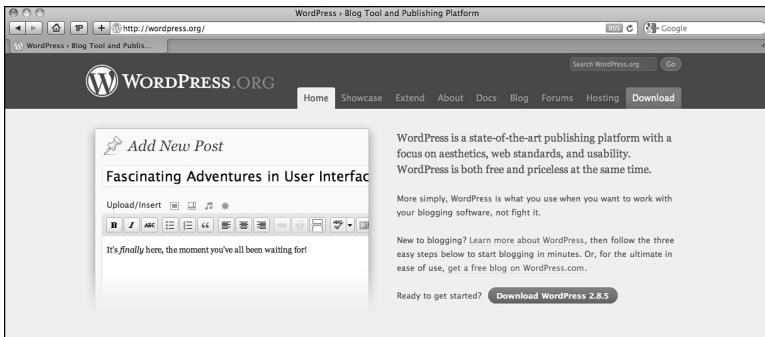


Figure IN.1 The WordPress.org home page, where you can download WordPress to install it and learn all things WordPress.

WordPress is open source, which means that users can look at the inner workings of WordPress and even modify how things work to their own liking. If your customizations or fixes are good enough or add a new (and needed) feature to WordPress, you can submit your changes to the community for review and inclusion as part of the WordPress *core*. To maintain order, continuity, and security in WordPress, five core developers are allowed to commit new code into the WordPress core. Even if your code might not be something that can be added to the WordPress core, you can release it as a *plugin*. A plugin is an extension to WordPress that adds a feature or functionality to WordPress that it doesn't have out-of-the-box—it's like putting a sunroof in your car if your car didn't come with it in the first place. I cover plugins in great detail in Chapter 6, "Finding and Using Plugins."

WordPress.org Versus WordPress.com

WordPress comes in two main "flavors": WordPress.org and WordPress.com. WordPress.org is where you go to download WordPress and where you find plugins and themes to add onto your install. WordPress.com is a service run by the

company Automattic that Matt Mullenweg and others founded to provide a free, hosted version of WordPress. WordPress.com was built on a fork from the WordPress tree called WordPress MU (multiuser), which enables you to have one install of WordPress that controls and manages many blogs at once. WordPress and WordPress MU have now been combined into WordPress as a whole. If you're confused, don't worry—most people are at first. It will start to make sense. For now, just remember that WordPress.org and WordPress.com are different, but related, versions of WordPress.

WordPress.com is run and owned by Automattic, which also curates and provides resources to WordPress.org. Matt Mullenweg and his associates founded Automattic to provide resources to the WordPress community and provide high-end hosting services to companies. Automattic provides the infrastructure to curate and support WordPress.org (and the new nonprofit WordPress Foundation) and employs many of the core WordPress developers. Automattic also acquires companies that have built WordPress plugins or extensions that would be better if the developers had more support (that is, a job and salary). Don't think of Automattic as the overlord of WordPress, though; the people there care *passionately* about open source and ensuring that WordPress will continue to grow and be developed long into the future.



SHOW ME Media IN.1—Important WordPress-Related Websites

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WordPress Conventions

You need to be aware of a few conventions used in this book. The proper way to spell WordPress is with a capital “W” and capital “P,” and we often abbreviate it “WP” (and use variations such as WP.org, WP.com, and WPMU). Plugins are spelled as such and not “plug ins” or “plug-ins.” (Don't laugh—there was a debate about the proper spelling that was only just settled in January 2009.) *Themes* are the files that make a blog look the way it does (also known as *templates*).

At WordPress.org, the documentation is called The Codex (yes, WP folks tend to have a flair for the dramatic), and the bit of code that does a lot of the legwork for all WP blogs is The Loop, which is the bit of code that looks like this:

```
if (have_posts()) :  
    while (have_posts()) :  
        the_post();
```

```
        the_content();  
    endwhile;  
endif;
```

All this does is go through the database and pull out all the posts written in the blog. It's so simple that you can understand why in the footer of WordPress.org, it says: Code is Poetry.

This book walks you through, step by step, how to make a great blog (or website) using WordPress. I start with buying a domain, picking a webhost, and getting your domain to work with your host. Then I move onto all the parts of WordPress, from installing to configuring to customizing to writing content. In each chapter, I note how WordPress.com differs from the self-installed version, and in Chapter 5, "How WordPress.com Is Different Than WordPress.org," I cover the topic in greater detail. By the end of the book, you will be well on your way to being a WordPress ninja.



TELL ME MORE Media IN.2—WordPress and the WordPress Community

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Using This Book

This book enables you to customize your own learning experience. Step-by-step instructions give you a solid foundation in using WordPress, while rich and varied online content, including video tutorials and audio sidebars, provides the following:

- Demonstrations of step-by-step tasks covered in the book
- Additional tips or information on a topic
- Practical advice and suggestions
- Direction for more advanced tasks not covered in the book

Here's a quick look at a few structural features designed to help you get the most out of this book:

- **Chapter objective:** At the beginning of each chapter is a brief summary of topics addressed in that chapter. This objective enables you to quickly see what the chapter covers.
- **Notes:** Notes provide additional commentary or explanation that doesn't fit neatly into the surrounding text. Notes give detailed explanations of how

something works, alternative ways of performing a task, and other tidbits to get you on your way.



LET ME TRY IT tasks are presented in a step-by-step sequence so you that can easily follow along.



SHOW ME video walks through tasks you've just got to see—including bonus advanced techniques.



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By the end of this chapter, you will be able to create several different types of websites using WordPress and know how to convert an existing site to WordPress.

10

Creating Sites with WordPress

If I had divided the book into parts, this would be Part II and is where the rubber hits the road. We have a domain or domains and a host. We've installed and tweaked WordPress. We've chosen a few themes to play with and have started to flesh out our site with content. So, I think it would be safe to call Part I of this book "Building the Foundation." Everything is in place to start getting down to business.

As you've gathered by now, WordPress is a *very* flexible publishing system. There are probably more ways to use WordPress than there are *users* of WordPress. Okay, that might be exaggerating just a little; but in truth, I've seen a lot of people use WordPress in some pretty amazing ways. In my time using WordPress, I've set up blogs (of course), websites (and I teach a very popular class to do this), collaboration systems, and even store fronts; and those are just the beginning. In this chapter, we're going to talk about using WordPress to build blogs and websites, how to convert an existing website to use WordPress, and use WordPress as a content management system (CMS). We'll then push into some new territory by using WordPress for project management and team collaboration, and then get into how you can use WordPress in Multisite mode and a set of plugins called BuddyPress to make your own social network. In the *very* short time that WordPress has been around (a mere 7 years in 2010), it has leapfrogged over many blogging engines, even ones with commercial support, to become a powerful tool. WordPress' success is a testament to the devotion and skill of the WordPress community, and I see no reason its popularity and usefulness is going to change anytime in the future.

WordPress as a Blog

WordPress started as a blogging engine and nothing in this chapter is going to suggest that WordPress has lost sight of its bloggy beginnings. I would hazard to say that with the release of WordPress 3.0, WordPress' strength as a blog engine is even *stronger* than it has ever been. The reason for this is obvious—the appeal of blogging hasn't lessened in the past years, but grown and multiplied. *The New York Times*, CNN, *People*, and other high-profile websites use WordPress to power their sites, which speaks to the power, flexibility, and stability of WordPress.

If you've worked through the preceding chapters of the book, you are ready to blog away to your heart's content. As you develop your blog, one thing to consider is that you don't need to have *all* your content on your home page. There are lots of themes that enable you to have "featured" posts that draw from only one category. Although my blog's home page is a catch-all for all my posts, I have worked on several blogs where that isn't the case. Having only certain categories of posts appear on the home page is a good way to highlight particular content, while also having additional content people can delve deeper into within the site. At several points in my time as a blogger, I would post seven or more posts *in a day*, which is great from a content-perspective. But if you figure that, by default, the homepage only displays the 10 most recent posts, there is a lot of content falling off the front page. To counter that, you can have categories such as "Featured" or "What's Hot" as the only categories displayed on the home page, which enables you to put the posts that you think deserve the most attention on the home page. Another popular option, and one I particularly like, is to use a magazine-style theme, where you have several smaller sections on your home page and each section displays posts from a different category.

You might be wondering if blogs organized in these ways even qualify as "blogs." Absolutely, they are. There are no rules saying a blog must look like this or that. The number-one rule of blogging is writing with passion about the things you love. How you present those posts are up to you. Don't let convention or "tradition" (which is more than a tad ironic because most blogs are less than 10 years old, including my own) dictate how you want your readers to read your posts. Maybe you write about fashion, movies, and restaurants and want to have men's fashion, women's fashion, movie reviews, and restaurant reviews all get equal billing. That's hard to do when you just have one column of content, and all your posts go there.

Here is what you should know about using WordPress as a blog—write what you want to write about and make your blog reflect you, and you'll be far ahead of anyone following "convention."

WordPress as a Website

Here's a challenge for you. Make a website that looks great, is well-organized, easy to update, and attracts search engines like bees to honey. How long do you think that would take you? When I built sites using static HTML files and images, it could take a few *weeks* to get the look right and all the structural elements in place (blank pages ready for content). Today, I build "regular" websites using WordPress, and the answer to that question can be as little as a day or two. Even if the "look" (aka theme) isn't perfect in a day or two, you can start adding content to the site immediately.

This wasn't possible before. Adding content to HTML pages before the look was complete would only lead to having to rework the content and the page later.

It wasn't long after WordPress started to become popular that people wanted to make a Page the home page instead of the "normal" blog (or Posts). At first, making a Page the home page and still having Posts somewhere else took a couple plugins and a few tweaks to the .htaccess file that weren't for the faint of heart. With the launch of WordPress 2.1 in January 2007 (code named "Ella"), these features for constructing a blog this way were built into the WordPress core; users had to make only a few clicks in the "Reading" section of the Settings to get going. (Refer to Chapters 3, "Getting Around WordPress," and 4, "Configuring WordPress to Work Its Best," for more about settings.)

Why is using WordPress to build a website not only easy, but also practical, time-saving, and better for the long run? Well, I've already told you that the development time when you use WordPress to build your site is a fraction of what it would be if you built a site with static HTML pages. You probably know that faster isn't always better, but faster and *more efficient* is better. The first efficiency you gain by using WordPress to build a website is that because your *content* isn't connected to the *theme*, if you need to update the theme for any reason, you don't have to worry about your content being affected. Posts, Pages, Categories, and Tags aren't affected at all when you update a theme. In development terms, this means that you can be adding content while the theme is being tweaked to your liking. No waiting for the final look to be approved and polished—just start writing and posting. Speaking of writing and posting, you've seen how easy the WordPress editors are to use. If you've used any web-based email program, you're set to start editing and posting content. If you're working with a team of people, this means little to no training is needed for them to get to speed. If it's just you, you don't have to learn arcane interfaces or procedures to update a page. You edit your content, simply and straightforwardly.

When the site is up, and you're updating content frequently, you can quickly see that your search engine traffic is substantial quickly. Sometimes within a month, you can be in the top 10 sites for your key search terms. *Why?* Because blogging engines, and WordPress especially, are tuned out-of-the-box to be structured the way search engines *want* sites to be. You have good, simple HTML with an RSS feed of all the latest content. All the posts and pages are linked together. Now combine that with categories, tags, and a couple of SEO plugins, and you don't have to worry about SEO if you write, post, and publish on a regular basis. You are well on your way to being found on search engines for the terms that match your niche. Ready to set up a site now?



LET ME TRY IT

Creating a Website with WordPress: Having a Static Page as Your Homepage

1. Create a Page with a title of “Blog” or “News” or whatever you’re going to call your posts. (By default, you already have the About Page, which will do fine as a home page [assuming you edit it], but you need one more Page for things to go smoothly out-of-the-box.) You can change the name of the page later, if you want. Don’t put anything in the body of the Page and click Publish.
2. Go to the Reading section of Settings. At the top is the section determining what your home page will be. Click the A Static Page radio button and then choose About (or whichever Page you want as the home page) for the Front page and Blog (or whatever you called it) for the Posts page.
3. Click Save Changes and...that’s it. Your former WordPress-powered blog is now a WordPress-powered website (see Figure 10.1).

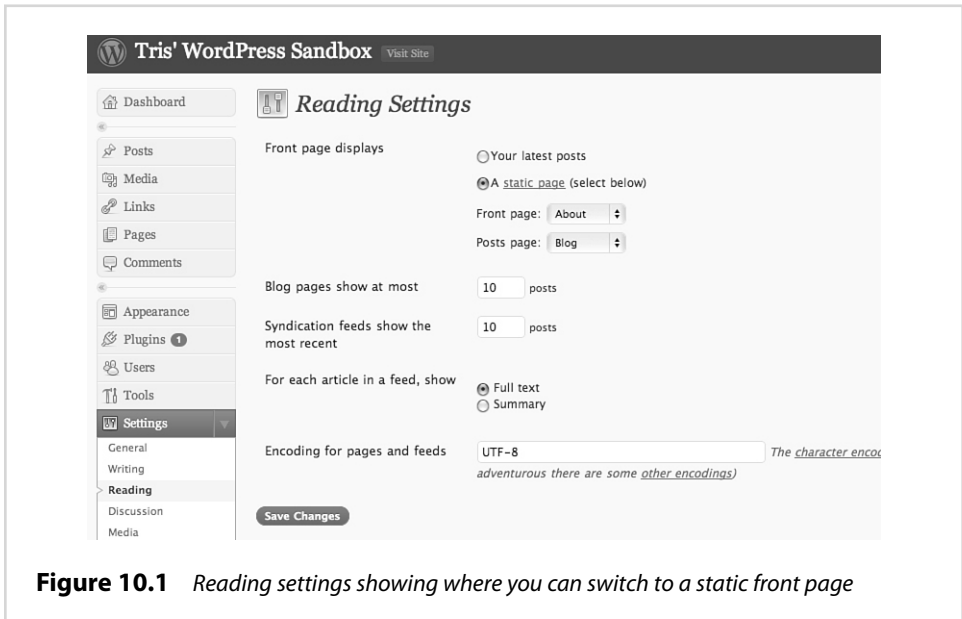


Figure 10.1 Reading settings showing where you can switch to a static front page



SHOW ME Media 10.1—Creating a Website with WordPress

Access this video file through your registered Web Edition at
my.safaribooksonline.com/9780132182836/media

From here on, it's just putting content together and getting your theme right. Some of the decisions you want to think about are whether you are going to use Pages for your Navigation or Post Categories or both. How many levels deep are you going to want to go?

However, don't worry if you make some missteps getting things ready. WordPress is very forgiving about those kinds of things. Yes, after you launch and people are using the site, when you change URLs around or delete Pages to make them Posts, you might cause a few 404 Not Found errors, but before that—don't worry. If you've followed my steps and advice for setting up WordPress in general, you're set. The settings I went through in Chapter 4 are the basic, core settings you should use, regardless of whether you are using WordPress as a blog or a website.

Many WordPress themes are more blog-centric than site-centric, so I've found myself having to do more theme editing when I'm working with WordPress-based websites than when I work with blogs. Most of the time, all that needs to be changed is excluding the Page ID that is also the home page from the navigation. Doing this makes sure you don't have two seemingly different links (say, Home and About) that go to the same Page (refer to Chapter 7, "All About Themes"). If you are going to stay with page-based navigation (which is probably the easiest), remember that when you create parent and child Pages, both the child *and* parent Pages should have meaningful content. You might chuckle, but I made this mistake making a site. I made a page for a top-level heading and two child pages. The child pages looked great and had content. I forgot to put any content in the parent (because I always navigated straight to a child page), but clicking on the parent page link was the *first* thing my boss did when I showed him the new site. Oops.

If you want to be more creative with your navigation, don't forget to take advantage of setting the menu order of pages that you'd like to group together. I've done this as a faux-grouping to put similar pages into context or to order pages the way I wanted them (instead of alphabetically). Just remember in WordPress page ordering that zero is the *highest* number, and all Pages with the same number are then sorted alphabetically (all the 0s, then all the 1s, then 2s, and so on). The next level of creativity is using *category-based* navigation with your page-based navigation. You can use a simple line of PHP code to list the categories you have set for the site:

```
<?php wp_list_categories(); ?>
```

To get a more detailed list of categories, ordered by name, up to three levels deep, *and* a link to the category's RSS feed, which would be a spiffy looking navigation menu for a site, use this line of code:

```
<?php wp_list_categories('orderby=name&depth=3&feed=RSS'); ?>
```

When you're building a website based on WordPress, don't think that you have to have only static Pages as your content. Using Posts for news releases, product listings, events, and other *time-sensitive* data is great, not to mention that having a whole section that is a standard blog is a great way to get the most out of your website. Remember, a website based on WordPress is as follows:

- Basic CMS
- Designed for multimedia
- Designed for different types of content
- Tuned for search engines from the start
- Easy to learn how to update

If you're concerned about WordPress becoming old hat or the technologies becoming obsolete, don't be. Not only is WordPress open-source with strong community support, the parts that make it run (PHP and MySQL) are also open-sourced with strong community support. Finding people who know PHP and MySQL isn't hard; it's a core part of most IT curricula now, and several other common CMS systems such as Drupal and Joomla are based on the same core technologies. The last, and most important, factor is that the WordPress community is built upon the philosophy that *you* own your data, not the platform. If you need, or want, to switch from WordPress, the export files are written in standard XML that any system can parse and pull out your data.

All this advice is all well and good if you don't have a site already, but what if you have a site built on HTML files (URLs that end with `home.html` or `about.html` or `products.html`)? What can you do then? Are you out of luck? Hardly. You just have to do a little more planning and work to get the site transferred smoothly.

Converting a Website to WordPress

Moving an existing website to WordPress isn't very hard, but there are some things you need to consider before you undertake this little project. The most important thing is that if your site has been around for any length of time, there are links to your site on the Internet. You don't want to "break" those links by changing the URLs of the existing pages, at least not without a way for people to find or be redirected to the new ones (Google especially). The next thing to consider is scale. How big *is* the website that you are planning to move? (Geeks call it "porting.") The bigger the website, the more links and URLs you're going to have to manage and redirect. Redirecting links and URLs doesn't even address moving the *content* (which luckily is often just a case of copy and paste), which can be tedious and time consuming to say the least.

Asking yourself, “Wait, why did I say I wanted to do this again?” is appropriate. It isn’t a quick, easy, or painless process. The process takes time, planning, and effort. When you’re finished, however, you have future-proofed your website. When you complete the process of porting all your content into WordPress, you can export your content to a single XML file any time you want. This can be a fail-safe backup, or for publishing or to move again. Because XML is an industry-standard for transferring information, especially large amounts of text and structured content, you can relax in knowing that your content is easier to work with and archive. When your site is tied into a traditional HTML-based website, your content isn’t easily pulled into one transportable document. There is a tremendous amount of inertia to move or change anything with the site, even moving or adding a section. Making a structural change to an HTML-based website can mean changing hundreds, maybe thousands of files, which isn’t fun. Adding a new section to a WordPress-based site is as easy as adding a new parent/top-level page or category and putting in the content. The rest of the site will take care of itself.

Now, let’s get to the “how” you’re going to do it.

Without a doubt, the first, and most important, priority is keeping your current live site up and running without interruption (except for the moment of the switch, which should only be a moment). Sure you want to have the old site gone and the new one up, but it can’t happen overnight. It doesn’t matter how much coffee you pour into a team of WordPress developers—flipping over a site in a few hours just isn’t a practical target. Depending on the size of your site, plan for between a week and a month to move your site to WordPress. Most of that time will be spent tweaking your theme and copying content. If you have lots of content and want lots of changes to a theme, the process is going to take longer. If you don’t have a lot of content and are happy with a theme as it is except for minor changes, the process might be shorter. Again, the important thing is planning. You have to plan how everything will happen. Surprises and “oops” aren’t welcome additions to creating a new WordPress-powered website.

I’m going to outline some *basic, high-level* steps for moving a site to WordPress. I can’t account for all contingencies or situations here in this book, but I’m going to try to hit the big items.



LET ME TRY IT

Moving a “Static” Website to WordPress

1. Make a backup of your current website *off your server*. The simplest thing to do is to use your FTP client and download the entire

public_html/www/web/htdocs folder to your local computer or external hard drive.

2. Pick a date when you will freeze content changes on the old site and stick to it, and make sure others stick to it as well. One of the most frustrating things when I'm porting a site is when I've checked off a page from my to-be-moved list and then someone changes the content on that page. Even if you're doing this all yourself, make sure you don't keep changing content on the old site.
3. Install WordPress. If you're like me and want to install WordPress in the root directory of the site, not a subdirectory like /wordpress/, be *absolutely positive* that none of the files or directories in your current site have the same name as WordPress files.

If you prefer to install WordPress in a subdirectory, you will have two parallel sites that are running independently. You can work on your theme edits to your heart's content and no one will be the wiser. (I call it hiding in plain sight.) You can also add content the site, but when you're done, you'll have to change the setting for the address of the site from *yourdomain.com/wordpress/* to just *yourdomain.com* and make sure that the new content is pointing to the right URLs. (For example, old about.html points to the new About Page, and so on.) No, it's not hard, just *fiddly*, and there is a big of a leap of faith when you make the switch.

A method described by David Cooley of CyberCoded (<http://www.cybercoded.net/convert-static-html-site-to-wordpress-easily/>) has you install WordPress at the root of your old site and then *copy* your index.html file (or whatever the filename of your original site's homepage is) to the new theme you are using (just copy the file itself to wp-content/themes/*your-theme/*) and call it home.php.

4. Now, create Pages for all the pages in your existing site. So if you have a page named products.html on your current site, create a Page called Products.
5. Copy and paste the content from the old html-based pages to the new WordPress pages, and if you use the Paste from Word button, your formatting should remain intact. You might have to re-insert your images into the new pages, but that isn't a huge hurdle. What you're doing is making a mirror of the site until you're ready to flip over.

One more thing to make this all come together is setting your permalink structure to `%permalink%.html` *after* you've finished pasting all your content over. (This makes sure you don't have conflicts with the html versions.) To use `.html` on *Pages*, you'll need a plugin called ".html on pages" to enable you to do the same for Pages as you have for Posts (available from the WordPress plugin repository at: <http://wordpress.org/extend/plugins/html-on-pages/>).

6. Copy the content from your old html home page and create a new Page for it to paste the content into. I'd set up WordPress to use that Page as the home-page with the Use Static Page option I talked about previously (a lot easier than editing more template files, I think). Now delete the `home.php` file from the theme directory and rename all the old html files from your site by adding "`old_`" so your new WordPress site will be live!

The one thing about any of these approaches is that tweaking your theme in transition isn't terribly easy. It's hard to see what things will look like when it's all said and done. Yes, as you're working with the WordPress pages, you can have a good idea what an individual Page or Post (or Archive of Posts) will look like, but it's going to be a small leap of faith for the final product. My "secret" for this is to either use or buy a theme that you really like with minimal tweaks *or* install WordPress on your laptop or desktop computer, work on the theme there, and then when you're done, upload those files. Working off a local copy isn't hard and can save you a lot of headaches if you want to have an elaborate theme. There is another way, though.

Think of the theme that you make the switch with as a transition theme. As you've seen in the various Show Me screencast examples, changing themes in WordPress is easy; if you're converting a site to WordPress, it's the converting process that is the hardest and worst part of the whole thing. So, get your site moved. Get all the content sorted out, links checked, and all that. Then use a plugin like Theme Test Drive (<http://wordpress.org/extend/plugins/theme-test-drive/>), which serves one theme to the admin user and another to everyone else, to work on an improved theme. Switching back and forth between old and new themes is painless and can be done so quickly; most visitors would never notice. This approach enables you to worry more about moving content and making sure you aren't breaking old links in the process versus how the new site will look. Of course, you want your site to look great, but there are hundreds of great themes that you can use in the interim while you work on a new killer theme.

In the end, moving your site to WordPress will be one of the best things you've done for your Internet presence. Just don't stress out about it.

WordPress as a CMS

This section is a little odd because WordPress *already is* a content management system (CMS), but what I'm talking about here is *expanding* WordPress' capabilities beyond a few basic content types (mostly Posts and Pages) to include types that you'd find in more standard CMS systems such as employee records and profiles. There are two ways to approach the fact that WordPress has limited content types. One is to use custom fields to give you more data per Post or Page to work with; the other is to develop plugins to allow you to build more data structures into the database that you can *then* put into special Pages. Confused yet?

Using WordPress as an *über*-power CMS is something that is a little beyond us mere mortals. One of the hottest plugins to really kick start the "WordPress as a CMS" movement has been Pods CMS. Having tried the plugins, and gone through the tutorials, I can safely tell you that this plugin is only for people who have exhausted using custom fields and other "simple" tricks like tweaking Post and Page templates.

Here is the trick to using WordPress as a CMS—just use it as a CMS. The idea of a CMS is to allow authors to easily contribute and edit content to the sections that they are responsible for, but not be able to muck about in areas they shouldn't. The one area where WordPress lacks in the whole CMS arena is in approvals processes and only allowing people to post to certain categories. Certainly not Earth shattering, by any stretch of the imagination, it just means that as a moderator you need to pay a little closer attention to what people publish (or when you give approval to publish). My guess is that over the next few months the CMS-related functions will start to improve in WordPress. WordPress 3.0 has significantly improved on previous versions' capabilities for custom post types and custom taxonomies (two parts key to improving WordPress as a CMS). I'd wager that in short order there will be CMS Themes and CMS plugins to help us mere mortals work with custom post types and custom taxonomies more easily.

Beyond Blogs: Other Uses for WordPress

Up until now, all the examples of using WordPress have been content-driven. Blogs, websites, and CMS systems are all about delivering content to people so that they can *read* it. Pretty much doing what websites have been doing since they started in 1991. (Yes, it's only been 20 years since the web was born; the Internet, however, is 40 years old.) In this section, I'm going to show you examples of some of my favorite uses for WordPress: Project Management, Team Collaboration, and Online Communities. These examples focus more on tricks, tools, and plugins that can

help you leverage WordPress as a *communications* tool versus just a *publishing* tool. One of the challenges of using WordPress like this is that there are few out-of-the-box, instant solutions to pull off any of these uses. You have to use plugins, themes, and more than a little creativity to pull it off. What's the pay off? When it works, it *really* works well.

Project Management and Collaboration

Project management and collaboration, at least doing them online using the web, are pet interests of mine. I've been a telecommuter working from home for almost all of the last ten years, so you figure out pretty darn fast how to keep a project on the rails and the lines of communication open when you might have only email, phone, instant messaging, and the web as your communications tools. Project management and collaboration overlap a great deal with each other because they have one important (critical) thing in common: communication. Well-run projects and teams *always* know what is going on from the big picture to the smallest detail. How does WordPress help with this? Aren't you just pushing this whole "WordPress is awesome" thing just a bit too far?

If you step back and look at what WordPress is all about, publishing and communication, you can see the beauty in using WordPress like this. Here you have a system where you can publish an update that is immediately available and can be discussed. You publish something, and the team members can get an email there is something new or via RSS or even via Twitter. (That's a really cool one, I think.) No, using WordPress to do this won't generate 3D flying Gantt charts and administer electric shocks through the keyboard if someone misses a deadline. (Wouldn't that be interesting to watch?) What it *can* do is let people share information, updates, tasks, and documents and have discussion *asynchronously* and with little to no training.

I'm working on the electric shock thing.

Project Management

Using WordPress for project management is really pushing things to the edge. Oddly enough, it's not because WordPress can't *handle* being used as a project management tool; it's that there aren't many plugins to help you in the process. The critical part of any project is keeping everyone on track and on time with their tasks. Neither WordPress nor any of the plugins I found are going to help you with that. I wasn't able to find snazzy gadgets for Gantt charts or those fun tools of the PM trade either. What is left is what WordPress is great at: content.

When you're setting up a WordPress install (can't really call it a "blog," can we?) for project management, the first question to ask is whether the site is for the team, clients, or both. On a site for just the team, frank and open discussion about the project are essential. On a client-facing site, some of the frankness and honesty needs to be tempered and toned down a notch or three. Regardless of client or team, chances are pretty good that you don't want other folks snooping around your site, so you need a way to keep the Huns at bay but still keep it easy for the permitted few to get in. I've found an excellent plugin called Registered Users Only (<http://www.viper007bond.com/wordpress-plugins/registered-users-only/>), which simply blocks anyone and everyone, except people with accounts (even a subscriber level is enough), from seeing any part of the site. I often pair it with a plugin called Private Files (<http://jameslow.com/2008/01/28/private-files/>) to make sure clever people don't try to sneak a peek at uploaded files as well. With those two simple plugins, you have a nice, closed-off extranet for you and whomever you want.

It is exactly this setup that I used with my editors and I while writing this book (see Figure 10.2). When chapters, videos, or podcasts were finished, I would upload them to my Editors extranet and email the team. The files were all zipped and ready to be downloaded. For a larger project (not that writing this book hasn't been a large project), you might upload the overall project plan as a Page so people have a reference. Team members can be listed on another page for easy access to contact information. If you're using other sites like Basecamp.com or LiquidPlanner.com for your project, have those as links in the sidebar for reference. Updates from various parts of the team can be posts with comment to discuss issues and questions.

Like all tools, it doesn't matter how cool it is—if people don't use it, the point is moot. I wish I had an easy answer for that problem, and if you have one, do let me know, but one thing I have found recently that has worked for projects and classroom collaboration is a very special theme called P2 from the folks at Automattic (see Figure 10.3).

P2 morphs WordPress and Twitter together into a theme designed for people to just use it *without ever going to the dashboard*. Post right from the home page. Leave a comment. Jump to a section that is more relevant to you. New items have a subtle yellow color until you scroll by it. Content is organized by tags not categories, but each tag has its own RSS feed so team members can even focus on the part of the project they are most interested in. I've put this at the end of the project management section, and before I talk about collaboration, because it is the P2 theme that I've found to be very successful at helping collaboration as well. For some great insight on how P2 works, Matt Mullenweg's post about how P2 changed Automattic is well worth the time: <http://ma.tt/2009/05/how-p2-changed-automattic/>.

The screenshot shows a WordPress blog interface. At the top, the title is "Using WordPress Book Editors Site" with the subtitle "Private Blog for the editors of Using WordPress". Below the title is a navigation bar with buttons for "Status Update", "Blog Post", "Quote", and "Link". The main content area features a post editor with a text input field containing "Hi, Tris. Whatcha up to?", a "Tag it" field, and a "Post it" button. To the right of the editor is a "Search for:" field with a "Search" button. Below the editor, there are three "Recent Updates" by Tris Hussey:

- Video segments for Chapters 8 & 9**: Posted 11:09 am on February 1, 2010. Tags: book files (6), Videos (4). Description: "Here are the video segments for Chapters 8 & 9... Chapter 8-9 video (465 MB zip file)".
- Video segments for Chapters 6 & 7**: Posted 11:30 am on January 31, 2010. Tags: Videos (4). Description: "Here are the screencast-showme segments for Chapters 6 & 7. I did 4 for each ... Let me know what you think about the style and such. I recorded the audio separately from the screencast so we can tweak if needed. Chap 6-7 video".
- Chapters and figures for Chaps 6-9**: Posted 10:26 pm on January 25, 2010. Tags: book files (6), chapters (3), Figures (2). Description: "Files for Chapters and figures for Chaps 6-9 6344ch6-ch9".

The right sidebar contains three sections:

- Recent Posts**: A list of post titles including "Video segments for Chapters 8 & 9", "Video segments for Chapters 6 & 7", "Chapters and figures for Chaps 6-9", "Podcasts for Chaps 2 and 4", and "Video Segments for chapters 4 & 5".
- Recent tags**: A list of tags with associated post counts and RSS links, including "Videos (4)", "book files (6)", "Figures (2)", "chapters (3)", "audio files (1)", "chapter 4 (1)", "chapter 2 (1)", "images (1)", "text (1)", and "All Updates RSS".
- Recent comments**: A section for recent comments, currently empty.
- Meta**: A section with links for "Site Admin", "Log out", "Entries RSS", "Comments RSS", and "WordPress.org".

Figure 10.2 *The extranet that I made for my editors and I to exchange content and comment on the project*

Collaboration

Online team collaboration sites...well, there are lots of them. Some are better than others, and I've used my fair share of the good, bad, and the "please just put it out of its misery" collaboration sites over the years. One of the success factors (or failure points) of a collaboration tool is how easy it is for people to use and adopt into their daily routine. Because "collaboration tools" cover a *huge* gamut of use cases and needs, I'm going to pick one use case to focus on, and I hope that this example will help inspire and guide you in using WordPress for collaboration in other ways.



SHOW ME Media 10.2—Using WordPress As a Collaboration Tool

Access this video file through your registered Web Edition at
my.safaribooksonline.com/9780132182836/media

P2

Blogging at the speed of thought.

P2 is a theme for WordPress that transforms a mild-mannered blog into a super-blog with features like inline comments on the homepage, a posting form right on the homepage, inline editing of posts and comments, real-time updates so new posts and comments come in without reloading, and much more. Here's a quick video tour of the best features:



Get the P2 theme

P2 is available on WordPress.com, or you can download it for WordPress.org. You can also check out a demo of the theme in action.

P2 is shorter, better, faster, stronger.

If you need P2 support or want to pitch in, drop a line on the forums.

Figure 10.3 *The P2 theme from Automattic for painless discussion and collaboration*

I'm in the tech industry, in case you hadn't guessed by now, but I also occasionally teach classes at a few local universities here in the Vancouver area. One of the hard parts about teaching is getting the class to participate and engage. I thought about hooking up a car battery to their chairs, but that idea didn't go over so well with the administration, so I started a private class blog instead. My class blogs are based on the same model as I described for the site I have with my editors; the class blogs are closed off to the outside world and use the P2 theme to collaborate. I *don't* use it for sending out homework and mundane class related stuff; I use it to help my students learn more about the tech world. For example, for a seminar class

called “Trendsetters,” the idea is to talk about what’s next and what’s new and challenge the students to look at the world a little differently. As part of class, each student needs to contribute just one post a week with a bit of interesting news or information from the tech world or even something that just inspires them.

In a previous class, I tried a different blogging platform that I *thought* would be easy enough for people to contribute, but for busy students, even a little bit of hindrance is too much. Using P2, each student just logs in, types their little bit at the top, and they’re done. Over time and with practice, I think my students (I often teach the same students from the same program) will start using it to share and collaborate more. This is just one example of how to use WordPress for collaboration.

How about working on sections of a document? A Post can be a section, and through group editing, you can revise it over time. WordPress now tracks all the changes in case you needed to roll back to a previous version.

I wouldn’t recommend using WordPress for formal approvals processes, unless you can have a special plugin developed to help you manage it; however, for almost any other collaborative effort, WordPress is a strong option to consider. Like you, I was a bit of a skeptic until I read how the Automattic team took P2’s predecessor theme, Prologue, and transformed it into P2, and how they collaborate with each other. Automattic is a virtual company. The employees are, literally, spread out around the world. To keep all the wheels in motion with WordPress.com and the development of WordPress and other company business, they used to use IM and good old IRC (Internet Relay Chat). Those two methods *are* great, and I’ve used them to work with virtual teams as well, but they have a *huge* drawback: time. If you’ve left your computer (I’ve heard people do this) and come back to a long IM chat that started, or continued, without you, catching up can take a few minutes. There might be a lot of chatter that doesn’t really matter, and it’s easy to miss the important “Okay, we’ve agreed the meeting is at 2 PM, downtown...” message. The folks at Automattic were having the same problem. So, with IM, IRC, and email, it got a little insane (I gather). Then came P2, and it changed *everything*. Now people could jump back to the site and new stuff (posts or comments) were yellow. If someone needed to catch up on *just* a particular conversation to topic (think tags for this), they would just jump to that section. Time became less important because the time it took to catch up was shorter. Sure there might be idle chatter going on in some threads, but the critical information stands out.

This is all well and good, but it does a fat lot of good if you can’t get people to use it. That is the topic for another book I think, but the only advice I can give is *taking away* other less efficient forms of communication can help. Unless you’re the boss, in which case you can just say so.

Creating Communities with WordPress

Today our Internet world is dominated by social networks and communities. Facebook is one of the highest-trafficked sites in the world with *millions* of members worldwide. We form groups with services like Ning or affinities through LinkedIn, but what if you want something all your own? What if you want a community with your own unique twist? What if you wanted to do it with WordPress?

One way to go about it is to just make a multi-author site and customize the theme to give each author a special template look. (This is now possible with recent versions of WordPress.) However, that becomes more like a publication than a community. And there is no way to allow for features like friends, messaging, wall posts...that is, until BuddyPress came along.

BuddyPress was a huge innovation for WordPress. It isn't a fork or branch or flavor of WordPress; it's a set of plugins that sits on top of WordPress. What BuddyPress does is to create all the features that you need to build your own social network. Oh, and it's free, too. Andy Peatling developed these plugins so well, Automattic hired him to develop for them full time. As WP innovations go, BuddyPress is right up there with the revolutionary changes like static front pages. BuddyPress expands how WordPress can be used into a *whole new level*.

At BuddyPress' core is WordPress running in multisite mode, so each user can have their own blog and even have multiple authors on the blog. Like WordPress.com, there is a limited set of themes offered, and plugins are managed centrally at the server level. What is completely new, different, and revolutionary is the layer *above* that: the community layer. Each user has their own profile area where they can post status messages, consolidate blog posts, manage friends, and send messages. Essentially, just like any other social network you can join. BuddyPress also offers forums and groups that operate separately from each other and blogs—yes, exactly as you'd think it would. One of the problems with WordPress multisite mode has been the challenge in creating aggregated stream from a single user and all users. WordPress.com implemented a system of systemwide tags, so you could read everything about a topic across *all* of WordPress.com. BuddyPress took that a step further with entire activity streams encompassing everything that goes on the site—forum posts, groups, blog posts, new members—all if it can be poured into the activity stream.



SHOW ME Media 10.3—Using BuddyPress to Make Your Own Social Network

Access this video file through your registered Web Edition at my.safaribooksonline.com/9780132182836/media

At this point, you might be thinking, “Awesome! Sign me up! I want one; where do I go?” The easy answer to that is after installing WordPress, you need to go to BuddyPress.org to download and install those plugins. The system requirements for the whole thing are the same as for WordPress, but with a twist. BuddyPress can work with WordPress 3.0 in both “regular” and multisite mode, but remember, running WordPress in multisite mode isn’t for novice users.

So, if this final bit of this chapter has you chomping at the bit to make your own social network with BuddyPress—believe me, the more I read about it, the more I’m trying to find a good project on which to try it out—the first thing is to start reading both the WordPress and BuddyPress forums. Then, if you think you can manage the install, give it a shot. If you run into trouble, hit the forums again. If all else fails, there are WP gurus everywhere; reach out through Twitter, Forums, and local WordPress groups, and I’m sure you can find someone to help you.

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