Design Document: Add Function to Your Website

Class Description

Learn how to manage and improve the function of your WordPress website with the plugin Jetpack. Discover how to add a contact form, set up widget areas, add user profiles and manage comments.

**Prerequisites:** Capable of using a web browser (i.e. Google Chrome, Internet Explorer, Safari or Firefox).

**Curriculum Track**

Basics

**Audience**

Adults

**Course Length**

90 minutes

**Training Method**

Instructor-led hands-on

**Purpose**

To show new users how to utilize the features available through the Jetpack plugin using the example of how to add a contact form. Demonstrate how widgets can enhance the web visitors experience, how to add user profiles and manage comments on posts.

Equipment Requirements

Projector and projection screen; computers with internet access for the instructor and each participant; laser pointer (recommended)

Software Requirements

One of the following. Windows 7, Linux or OS X.

Material Requirements

Pens or pencils, activity sheets, handouts, participant surveys

**Learning Objectives**

At the end of the session, learners will:

* Know what features are available within the Jetpack plugin
* Create a contact form
* Add and edit Widget areas
* Add and manage user profiles
* Manage comments

**Assessment Technique(s)**

Successful completion of class activities

Content Outline

**Agenda (3 mins)**

* Outline the following topics that will be covered in class:
  + Terminology & Descriptions
  + Review Jetpack plugin
  + How to add a contact form
  + How to add and edit widgets
  + Add and manage users
  + How to manage comments

**Topics, Talking Points, and Activities (85 mins.)**

* Terminology & Descriptions
  + Define the following terms for participants:
    - **Jetpack**: a free plugin offered by WordPress.com for adding function to a site
    - **Comments:** allows website visitors to discuss the topics posted on your site
    - **Contact Form:** offers your visitors the opportunity to get in touch, without displaying your personal email address
    - **Widget**: A tool for populating content, navigation menus and lists within a sidebar area of a WordPress website
    - **User Profile:** defines user permissions using a role management system
    - **Spam**: electronic junk mail or junk postings

**ACTIVITY**: Have participants complete **Activity #1** on the *Activity Sheet*

* Jetpack Review
  + Explain how WordPress.com includes one plugin by default called Jetpack.
  + Note several features of the Jetpack require upgrading to a paid hosting plan.
  + Review the features available with the free plan
  1. Click on **Plugins** located in the left menu
  2. Review the list of *ACTIVE* features and those that require an upgraded paid plan
* How to add a contact form
  + Live demo how to apply Jetpack’s Form Builder feature:
  1. Click on **Pages** located in the left menu
  2. Choose the **Contact** page
  3. With the curser in the body of the page, click the carrot next to the plus/circle icon
  4. Choose **Add Contact Form**
  5. Clickthe **Add New Field** button near the bottom of the window
  6. Type in *Please send me weekly recipes to try at home*.
  7. Choose **Checkbox** from the Field Type dropdown menu
  8. Click the blue **Insert** button
  9. Then click outside the window to close it
  + Live demo how to edit Jetpack’s Form Builder feature:

1. Click anywhere on the form
2. Choose the **Pencil** iconpage
3. Click on the **Trash** icon to the right of the Website form field
4. Click the blue **Update** button
   * Live demo how to edit the send-to address of Jetpack’s Form Builder feature:
5. With the form window still open click on the **Settings** tab
6. Enter an email address
7. Enter a subject line
8. Click on the blue **Update** button

**ACTIVITY**: Have participants complete **Activity #2** on the *Activity Sheet*

* How to add and edit a Widget
  + Describe Widgets as an area on the web page for highlighting recent activity, specific topics, social treads, encourage email or RSS signup, and adding a location map.
  + Be sure to note how the location of a widget area will be different from one theme to the next
  + Live demo how to remove a Widget:
  1. Click on the grey **Customize** button located in the left menu next to Themes
  2. Click on **Widgets** in the left menu
  3. Click on **Footer**
  4. Click on **Search** (it should appear by default)
  5. Click on **Remove**
  6. Click on the blue **Save & Publish** button
  + Live demo how to add a Widget:

1. Click on the grey **Customize** button located in the left menu next to Themes
2. Click on **Widgets** in the left menu
3. Click on **Footer**
4. Click the grey **Add a Widget** button
5. Choose **Category Cloud** from the fly out menu
6. Enter the title *Food Topics*
7. Change the Maximum number of categories to show to *10*
8. Click the blue **Save and Publish** button

**ACTIVITY**: Have participants complete **Activity #3** on the *Activity Sheet*

* Review of User Profiles
* Explain the 5 different user roles that can be assigned to individuals, each with its own capabilities and limitations.
  1. Subscriber
     + If allowed, visitors can set up their own user profile
     + This role is limited to managing their own profile
     + If you set Comments to require users to be registered, this is the role they would be assigned
  2. Contributor
     + This role comes with the capability to create, edit and delete their own unpublished posts
     + Its limitations are the inability to upload media, publish posts and editing or deleting a post once it is published
     + When submitting a post, the *publishing* button is replaced with a *submit for review* button
  3. Author
     + This role comes with the capability to create, edit, publish and delete their own published posts plus add media
  4. Editor
     + This role has the same capabilities of an Author plus the ability to delete post from other users, moderate comments and manage categories
  5. Administrator
     + Full control over the entire site
     + Capable of editing user profiles and deleting user profiles
* Outline the following steps for adding user profiles

1. Click the **Add** button next to *People*
2. Enter an *email*
3. Choose a *role* from the dropdown menu
4. Enter a brief *message* in the Custom Message box
5. Click the blue **Send Invitation** button

**ACTIVITY:** Have participants complete **Activity #4** on the *Activity Sheet*

* How to manage Comments
* Start by noting comments can be manage on individual posts and pages
* Outline the following steps for allowing comments on posts

1. Click **Settings** located in the left menu
2. Choose the *Discussion* tab
3. Under *Comments* box toggle on *Comment author must fill out name and e-mail*
4. Under *Before a comment appears* box toggle on *Comment must be manually approved*
5. Click the blue **Save Settings** button

* Demonstrate how to add a comment on a post with the above settings in place

1. Log out of WordPress.com
2. Enter the sites URL in the browser
3. Click on **Blog** and choose any post
4. Scroll down below the post to the *comments* box and enter a comment
5. Fill in an *email* address and *name* (anything will do)
6. Click the **Post Comment** button

* Demonstrate how to approve a comment on a post

1. Click the **Bell** icon located in the upper right corner of the tool bar
2. Choose the *Discussion* tab
3. Under *Comments* box toggle on *Comment author must fill out name and e-mail*
4. Under *Before a comment appears* box toggle on *Comment must be manually approved*
5. Click the blue **Save Settings** button

**ACTIVITY:** Have participants complete **Activity #5** on the *Activity Sheet*

**Wrap Up/Closing (3 mins.)**

* Highlight the upcoming WordPress classes and share the types of topics that will be covered
* Ask if there are questions and answer any that were “parked” during the session
* Thank participants for coming and ask them to complete the class survey before leaving