WordPress User Guide for Administrators

Contents
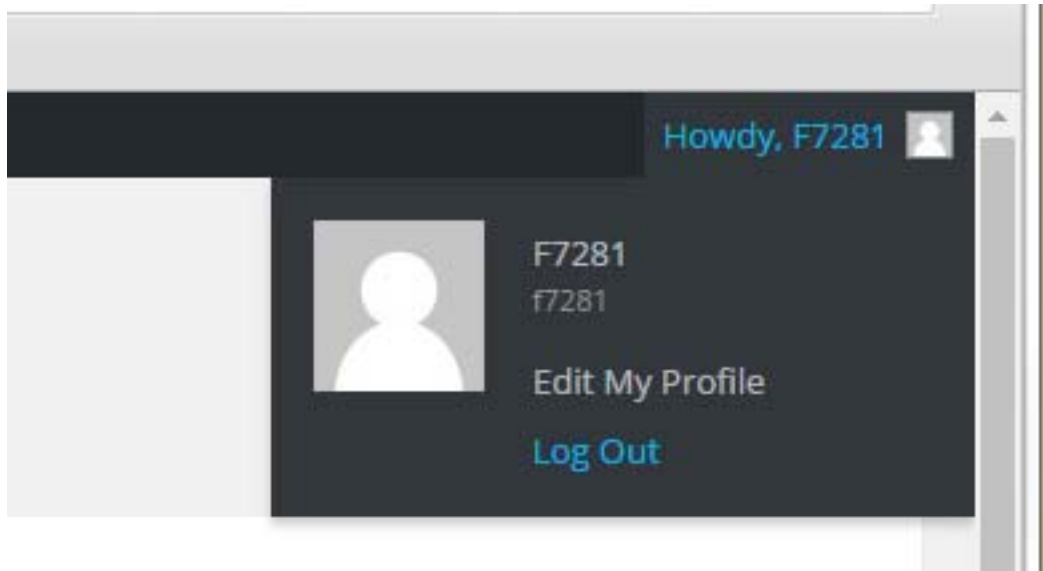
1. Accessing the Site and Managing Your User Account

Logging In and Out:

You can login using http://wp.sbcounty.gov/dph/login

You logout using the menu in the upper right-hand corner of the screen:

Password and View Your User Profile:

You can view your profile by clicking on the "Edit My Profile" link in the right-hand menu shown above. User accounts for the internet WordPress sites use your employee ID for your username. Passwords are system generated upon invitation to the site.

Change Your Password:

You can change your password once logged in for the first time by either logging out and clicking the "Lost your password?" link within the window or through the user panel by clicking the "Generate password" button. You can type in a rememberable password, but please make sure it is strong.

Username or Email

f7281

Password

●●●●●●●●●●●●●●●●●

☐ Remember Me   Log In

Lost your password?

← Back to DBH Internet Website

Account Management

New Password   UFZuHYJX$YNlbHqmxhkEihcs   ×   👁 Hide   Cancel

Strong

Enter your new password below.

New password

BJRMKPOd79$oKj4$

Strong

Hint: The password should be at least twelve characters long. To make it stronger, use upper and lower case letters, numbers, and symbols like ! " ? $ % ^ &).

Reset Password

Log in

← Back to DBH Internet Website

The system still gives you a system-generated password that it recommends, but at this point you have the option of changing it.

2. About WordPress

At any time, you can access information about WordPress itself using the "W" icon on the far left-hand side of the top menu bar. Using the menu, you can also access documentation and forums to find answers to questions.
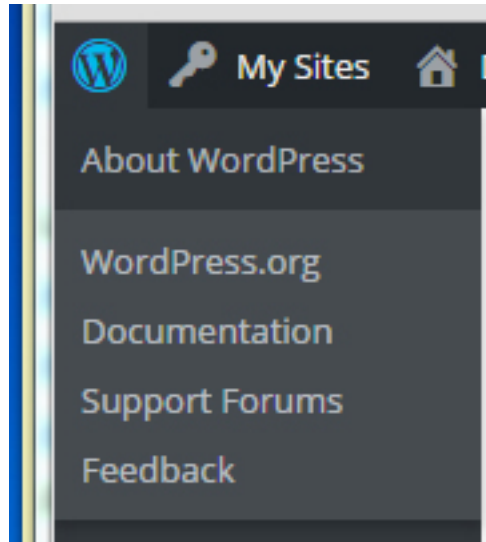
3. Your Sites and Dashboard

Once logged in you will see a dashboard and black menu bar on the top and left side of the screen. From the top "My Sites" menu you can manage and view any sites you are an admin for. At any time you can view a site by choosing the site name from the "My Sites" menu.

The current site you are viewing/editing will be listed next to the house icon at the top.
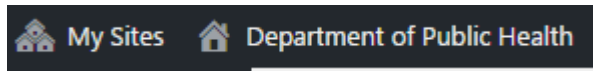
The dashboard is your first view into your site. It gives you the status of items at a glance, including workflow items and Google analytics.

4. Sidebar Menu

The sidebar menu is how you navigate the site on the backend. From here you can access all the different features and functionality.

Dashboard

Home
My Sites

Posts

Events

Media

Pages

Comments

Projects

Workflows

Appearance

Plugins

Users

Tools

Settings

Forms

WonderPlugin Slider

Mega Menu

Divi

Google Analytics

Collapse menu

5. Posts

The Posts section is where DPH adds new News articles for the homepage and EHS, as well as EHS Food Recalls.

Change the Screen Settings:

The first time you work with posts you will need to change some screen settings. These settings only need to be changed once. Choose to "Edit" one of the post—so you are on the "Edit Post" page.   Click on the "Screen Options" link at the top on the right.
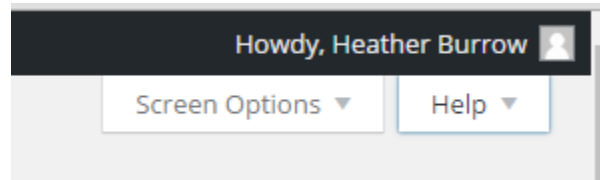
This reveals a window of options. Make sure the box is checked for Categories. Once done, click the "Screen Options" link again to unreveal the window.
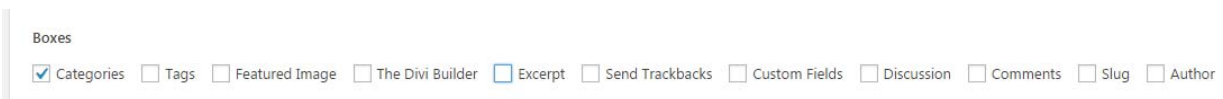

This action makes only this section viewable on the edit screen for this module. Since this is the only feature you will need access to, this is the only one that needs to be visible.

**Add new News Article or Food Recall Item:**

To add a new one:

1. Click the "Add New" link
2. On the Edit Post page, enter a title for the item. The title will be used as the link URL. You can change the created URL by clicking on the "Edit" button next to the "Permalink" display of the URL. (You will need to click out of the title area to see the edit option.)
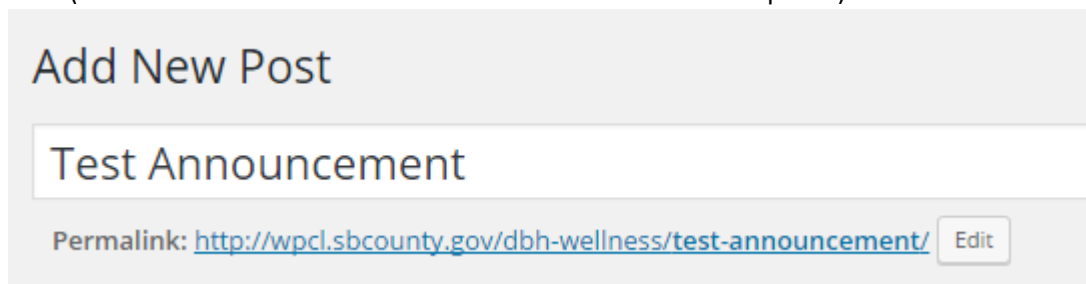
3. Add in the full content for the item. Upload a document if needed, using the "Add Media" link.

If you choose to use the default WordPress editor, you can either view this editor in "Visual" mode or "Text" mode. Visual mode shows the content parsed and how it will be on the webpage, minus any layout. Text mode shows the content in HTML. You will notice that the editor's tool bar of options

changes depending on which mode you are in. To see more toolbar features and capabilities toggle the toolbar to show more by clicking the "Toggle Toolbar" icon.
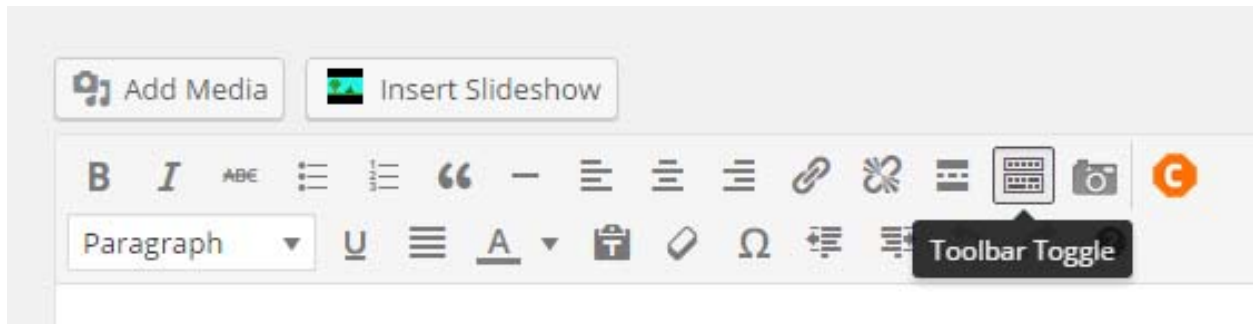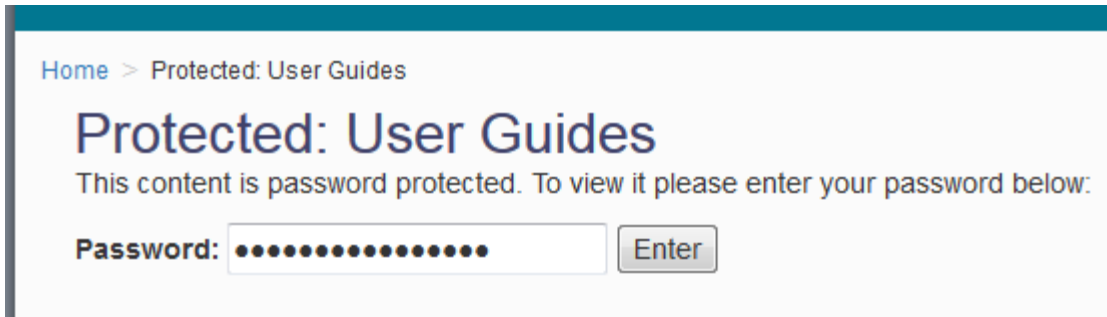

Since you are only adding basic content for these items you don't need to use the Divi Builder.

4. On the right side, check mark which category it is. If you don't checkmark this, then the post will not appear in the homepage news feed, EHS news feed, or recall page.
5. When done, click the "Publish" button. As an admin, you can publish posts directly by clicking "Publish." But you can also use the workflow by clicking "Submit to Workflow" for review and approval of the post. If you want to save and finish the post later, click the "Save" button. This saves a Draft version and the Status will remain Draft until you revisit the post and click either Publish or Submit to Workflow.
6. You also have the option of publishing the post at a later time by clicking the "Edit" link next to the "Publish immediately" text.

NOTE: You can also make a post or page private (only seen by those logged in to the system) or password protected by adding a password.

If you use the password protected functionality, anyone visiting the URL of the page will be prompted to enter the password before viewing it.

Once a post has been published, the Status is changed to Published and there is no "Save" button anymore. To make an update directly and publish it again, make your edits and then click on the "Update" button. To make post edits and to use the workflow, click the "Make Revision" button. This will make a copy of the post and once approved it will overwrite the original.
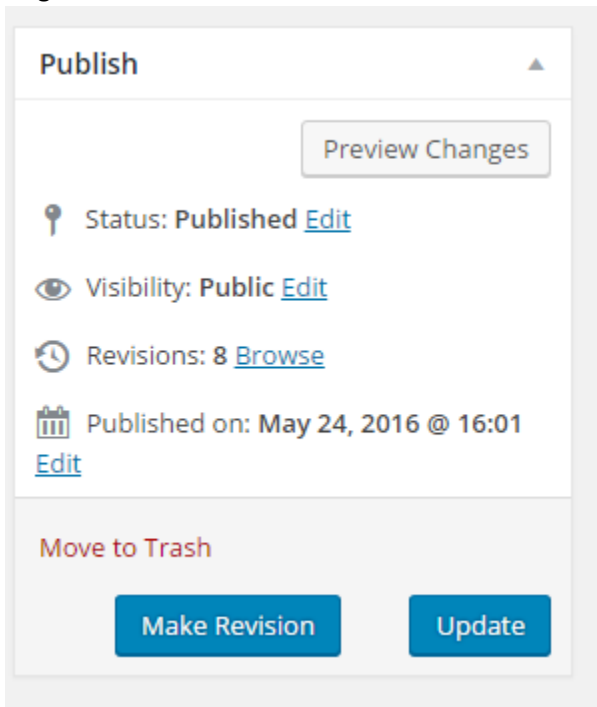
Double-Booking:

If someone else is already editing a post, you will see a warning in the dashboard like the below image. You can't edit a post that someone else is editing. Once they have exited the Edit Post page, you can choose to edit it.
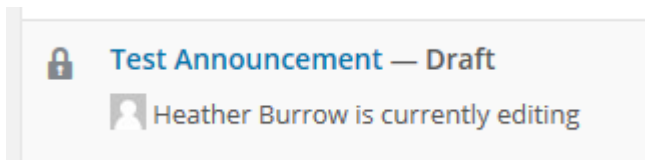
Using the Workflow:

Contributors only have adding and editing capabilities so they see a "Submit to Workflow" button only. As an admin you can also review, approve, and publish content. If you would like to use the workflow, choose the "Submit to Workflow" button and then you will see a "Submit" window. For full information on the workflow process, view the section about Pages.
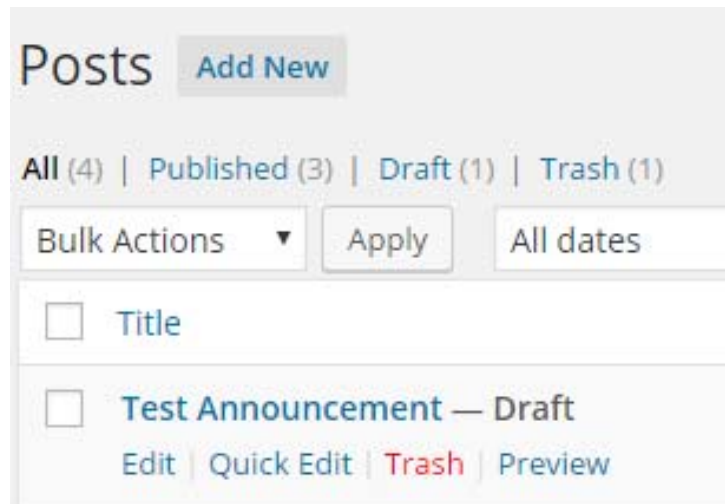
Delete a Post:

At any time if you want to delete a post, click the "Trash" link under the post within the Post Dashboard.

Restore a Deleted Post:

To restore a deleted post, click on the "Trash" link at the top of the Post Dashboard. This takes you to a list of deleted posts. Click on the "Restore" link under the post that you want to restore.
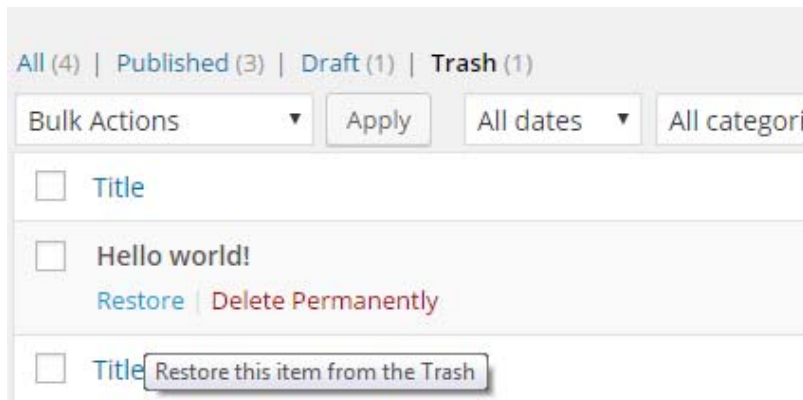
Manage Post Categories:

To manage post categories, click the "Categories" link under the Posts section on the left sidebar. From here you can add new categories, edit existing ones, or delete ones.

6. Events

Once you have clicked on the "Events" link either at the top or on the side menu, you will see the events dashboard, which lists all events.

Change the Screen Settings:

First, change the screen settings for the events module. Once within the Events dashboard, click on the "Screen Options" link at the top on the right. This reveals a window of options. Make sure the boxes are checked for The Events Calendar, Event Categories, Event Options, and Featured Image. Once done, click the "Screen Options" link again to unreveal the window. Again, this only needs to be done once.

Boxes

☑ The Events Calendar ☐ Excerpt ☐ Discussion ☐ Comments ☐ Slug ☐ Author ☐ Tags ☑ Event Categories ☑ Event Options ☑ Featured Image

Add New Event:

To add a new event, click on the "Add New" button at the top of the events dashboard. Since much of the event adding process is similar to the post adding process, please refer to the post section for additional details.

#1 Once on the new event page, give the event a title.

#2 Add the text for the event in the Content Editor area. (*The Divi Builder cannot be used for events.)

#3 Add the day and time for the event within the Event Calendar section.

#4 Add the recurrence rules if it will recur. For example, a monthly meeting that happens the fourth Tuesday of every month would have the below rule outlined. I suggest only have the event recur for 12 months. If you don't specify, the maximum recurrence is 24 months. These events will appear in the monthly calendar though, and so next year's meetings will be seen if you choose the default 24 months option.

Recurrence Rules: Custom ▼ and will end After ▼ 12   events

Frequency Monthly ▼ Every 1   Month(s) on the:

Fourth ▼   Tuesday   ▼   ☑ Same time

An event every 1 month(s) on the fourth Tuesday that lasts 0 day(s) and 1 hour(s), but only create 12 event(s)

Add Another Rule

Exclusions: Add Exclusion
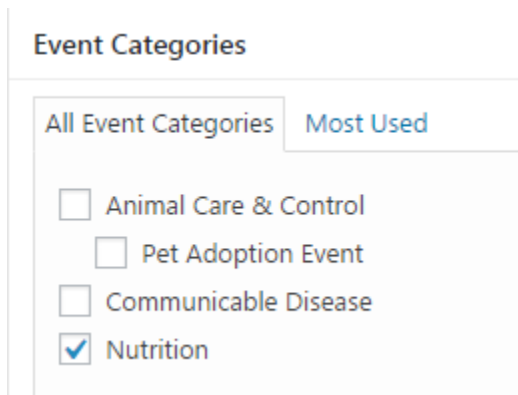
Recurrence Description:

Use this field if you want to override the auto-generated descriptions of event recurrence

#5 Add the location. There are a number of locations already entered in that you can choose from using the dropdown menu. Or choose to add a new location if your location is not shown as an option. Leave the two checkboxes marked to show the Google map and link.

#6 Add the organizer if needed.

For now there are no website or cost information being used.

#7 Check mark the event category, or add one if needed.

Event Categories

All Event Categories	Most Used

☐ Animal Care & Control
   ☐ Pet Adoption Event
☐ Communicable Disease
☑ Nutrition

#7 Add the featured image optionally. Make sure to give the image a title and alt text (same as title usually). The image will appear at the top of the full event page if one is chosen.
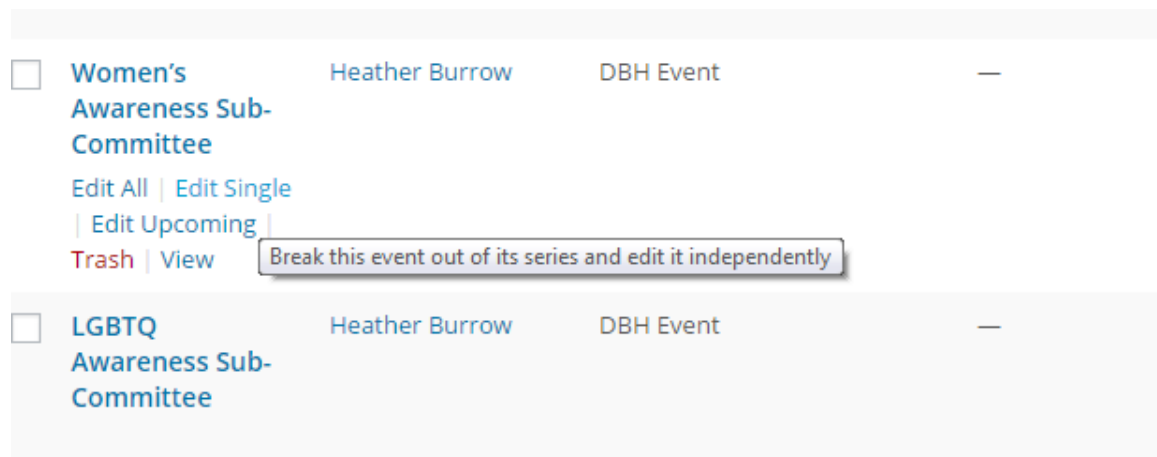
#8 Click the "Publish" button if new and you want to directly publish or "Update" if editing one already published. Alternatively, use the workflow option for review.

Edit One in a Recurring Series:

You can edit one event in a recurring series to either delete only it or change its information.

#1 Within the list view for all events, hover over the event date you want to edit or delete.

#2 From the menu that appears choose to "Edit Single" event

	Women's Awareness Sub-Committee	Heather Burrow	DBH Event	—
	Edit All | Edit Single | Edit Upcoming | Trash | View	Break this event out of its series and edit it independently		
	LGBTQ Awareness Sub-Committee	Heather Burrow	DBH Event	—

Same as Posts:

For information on deleting, restoring, publishing later, using the workflow, etc. please see the Posts section.

How it Looks:

Once an event is published, a page is created for that event with the title at the top, the day and time underneath, and the information in the main area. Users can use the "iCAL Export" button to send this event to their Outlook calendar.

Manage Event Categories:

To manage event categories, click on the "Event Categories" link on the sidebar. From here you can add new categories, edit existing ones, or delete ones.

7. Media

Once you have clicked on the "Media" link from the side menu, you will see the library of all your uploads (images and documents). Within the library, you can filter or search for a specific upload. Or add a new one by clicking on the "Add New" button. The maximum upload size is 12MB.

Overwrite Documents and Images:

You can at any time overwrite an existing file (document or image) on your site using the Media Library. (You can also replace within a page and once you choose to "Insert Media" the process is the same as below.)

#1 Click on the item you would like to replace within the library.

#2 Within the "Attachment Details" window, click on the "Upload a new file" button

File name: contact_usx800.png
File type: image/png
Uploaded on: May 19, 2016
File size: 258 kB
Dimensions: 800 × 855

URL	http://wpcl.sbcounty.gov/dbh-wellness/wp-
Title	Contact Us
Caption	
Alt Text	contact us
Description	
Uploaded By	Heather Burrow
Uploaded To	Contact Us

Required fields are marked *

Replace media   Upload a new file

To replace the current file, click the link and upload a replacement.

View attachment page | Edit more details | Delete Permanently

#3 Within the "Replace Media Upload" window, click on the "Choose File" button and navigate to the new file's location.

#4 Choose to either just replace the file or choose to replace and rename, which will update all links pointing to the file.

#5 Click the "Upload" button when done.

Replace Media Upload

NOTE: You are about to replace the media file "contact_usx800.png". There is no undo. Think about it!

Choose a file to upload from your computer

[Choose File] No file chosen

Select media replacement type:

🔘 Just replace the file

Note: This option requires you to upload a file of the same type (image/png) as the one you are replacing. The name of the attachment will stay the same (contact_usx800.png) no matter what the file you upload is called.

⚪ Replace the file, use new file name and update all links

Note: If you check this option, the name and type of the file you are about to upload will replace the old file. All links pointing to the current file (contact_usx800.png) will be updated to point to the new file name.

Please note that if you upload a new image, only embeds/links of the original size image will be replaced in your posts.

[Upload] Cancel

Link Rules:

#1 No "click here" text: Please do not use "click here" for the link text for *any* link. It is not descriptive, not easily scanned by users to see what the link is, nor will screen readers who jump to the next link easily know what the link is without scanning the content around it. Instead, use "View" and the name of the webpage or document. (i.e. = View the DBH Annual Report.)

Correct = View our site's Events webpage.

Incorrect = To view the events for our site, click here.

#2 New window vs. Same window:

If the link is a *document*, it should open in the same window.

If the link is a webpage *outside* your site, it should open in the same window.

If the link is a webpage *within* your site, it should open in the same window.

#3 Use pdfs when able: Only upload Word docs when necessary, as these require users to have a Microsoft program to be installed on their computer. If possible, convert the document to a PDF for viewing by all users. **Same goes for other file formats, like PowerPoint or Publisher files.

8. Divi Page Builder Plugin

Before we review pages, let's review the Divi page builder, as it is used within pages. The Divi Builder option is given at the top of Pages and looks like a big purple button.
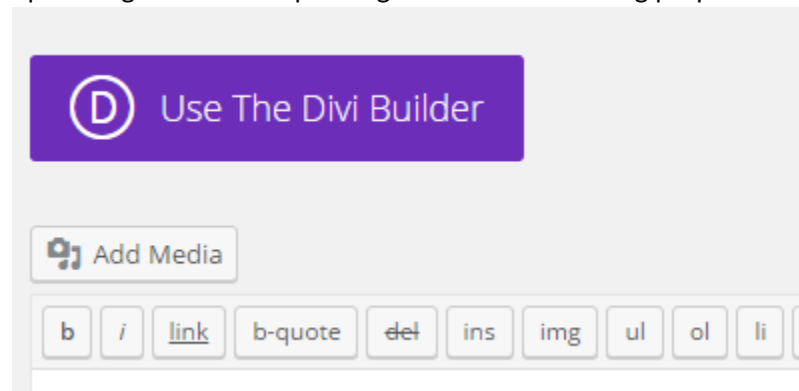
When clicked it swaps out the default content editor with a more advanced content editor that comes with pre-built in layouts and modules. If you choose to use the Divi Builder for a page that is already created, it will take the current content and insert it into a text module in a default layout that you will then have the ability to change and add to. If you are using the Divi Builder for a page and decide to revert back to the default WordPress content editor, all content created in the Divi Builder will be lost. And any previous content will be restored.

With the Divi Builder you can add out-of-the-box modules with extra functionality, clone content, lock content, hide content, add custom CSS, undo actions---all using the editor window's interface.

For complete information on the Divi Builder visit their site: http://www.elegantthemes.com/plugins/divi-builder/ .

Once you have chosen to use the recommended Divi Builder, you will have the option to choose one of the default layouts and what modules to insert in to each layout area. For more information on the layout options, visit the Structural Elements section http://www.elegantthemes.com/preview/Divi/sections/ .
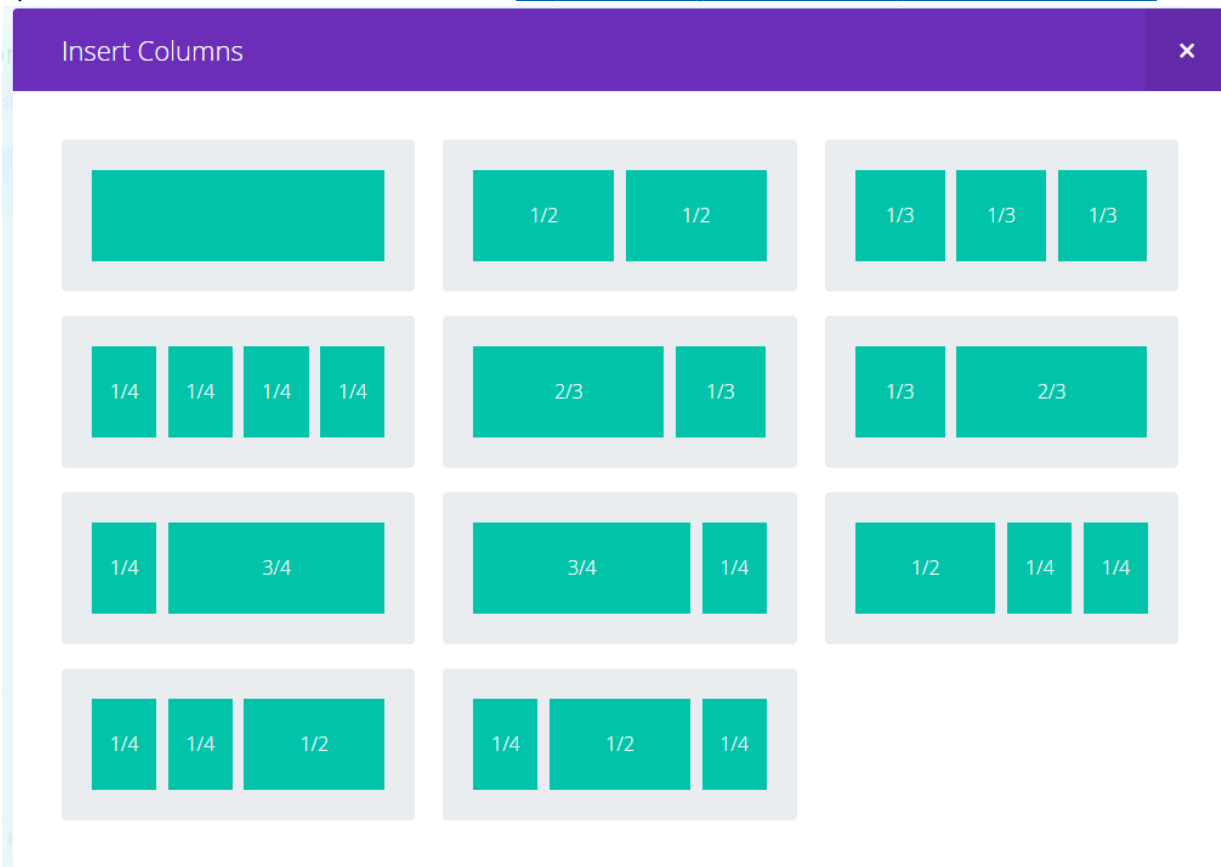
For more information on the modules offered, visit the modules section, which gives a live preview of what each module looks like and how it works http://www.elegantthemes.com/preview/Divi/image/ .
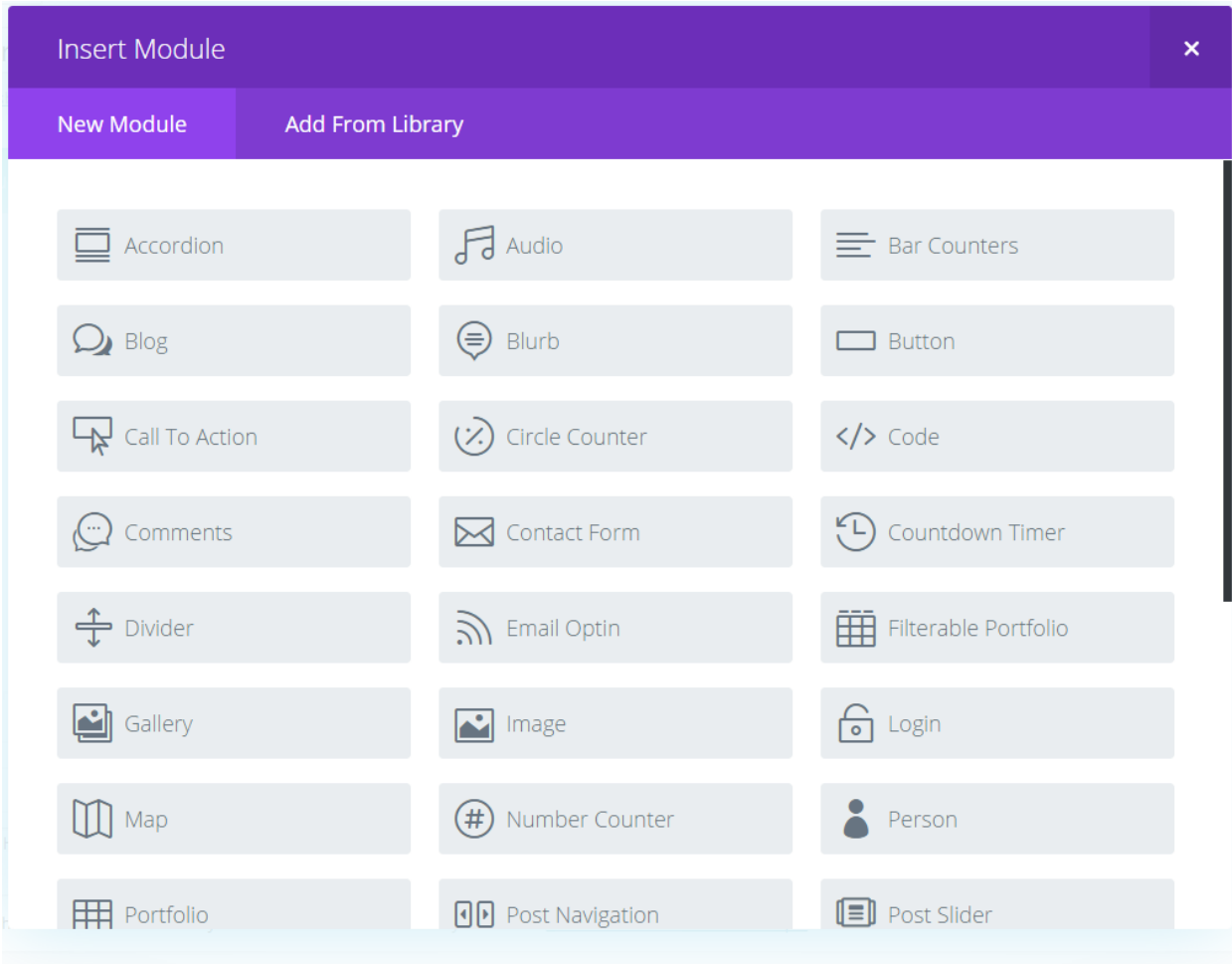
9. Pages

Once you have clicked on the "Pages" link from the side menu, you will see the Pages Dashboard.

Change the Screen Settings:

The first time you work with pages you will need to change some screen settings. These settings only need to be changed once. Choose to "Edit" one of the pages—so you are on the "Edit Page" page. Once on the Edit page screen, open the "Screen Options" window and check mark: The Divi Builder, Revisions, Page Attributes so that these sections are visible. Once done, click the "Screen Options" link again to unreveal the window.
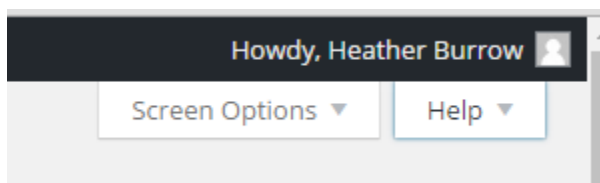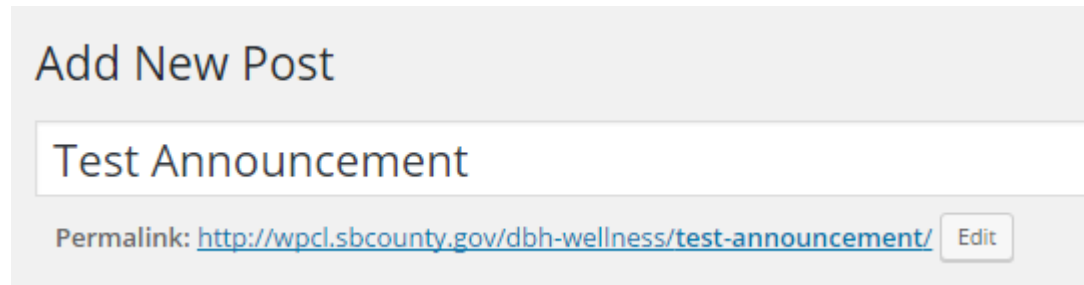

This action makes only these sections viewable on the edit screen for this module. Since these are the only features you will need access to, these are the only ones that need to be visible.
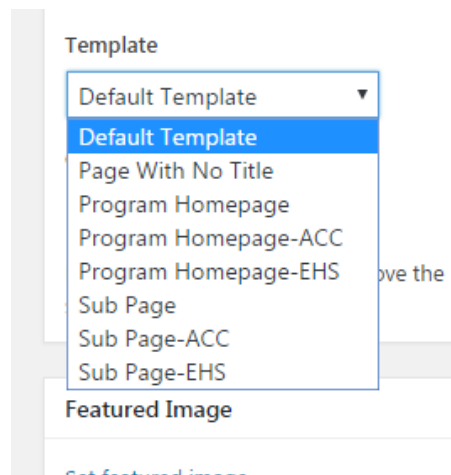
Add a New Page:

There are a number of ways to add a new page, using the top menu's "New" option, the "Add New" button on the page dashboard, or the "Add New" link on the side menu.

#1- Add a Title: Once you are on the "Add New Page" page, give the page a title. The title will be used as the link URL and the name on the page. You can change the created URL by clicking on the "Edit" button next to the "Permalink" display of the URL. (You will need to click out of the title area to see the edit option.)

Add New Post

Test Announcement

Permalink: http://wpcl.sbcounty.gov/dbh-wellness/**test-announcement/**   Edit

#1a- Under Page Attributes, choose what page is the parent of this new one if you are nesting.

#1b- Under Page Attributes, choose the page template. Use the "Default Template" for normal pages. Use the "Program Homepage" template for any page that is the top-level homepage for a program (or the ACC/EHS versions if needed). And use the "Sub Page" template for any second-level page for a program (or the ACC/EHS versions if needed). If you are unsure, find a page that looks like what you want and look at its setting.)

Template

Default Template   ▼
Default Template
Page With No Title
Program Homepage
Program Homepage-ACC
Program Homepage-EHS   ove the
Sub Page
Sub Page-ACC
Sub Page-EHS

Featured Image

#2 Add the Content: Now add the content to the content editor area. If you choose to use the default WordPress editor, you can either view this editor in "Visual" mode or "Text" mode. Visual mode shows the content parsed and how it will be on the webpage, minus any layout. Text mode shows the content in HTML. You will notice that the editor's tool bar of options changes depending on which mode you are in. To see more toolbar features and capabilities toggle the toolbar to show more by clicking the "Toggle Toolbar" icon.
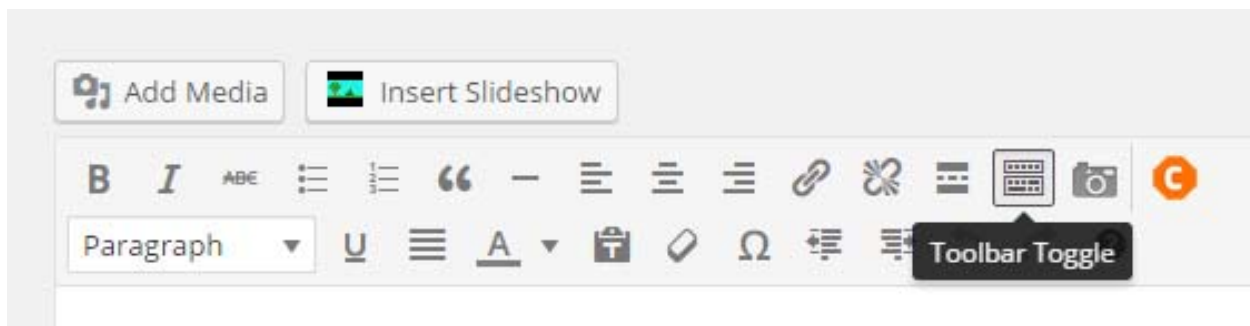
I recommend using the Divi Builder for all pages. If you choose to use the Divi Builder, you will be prompted to choose a layout.
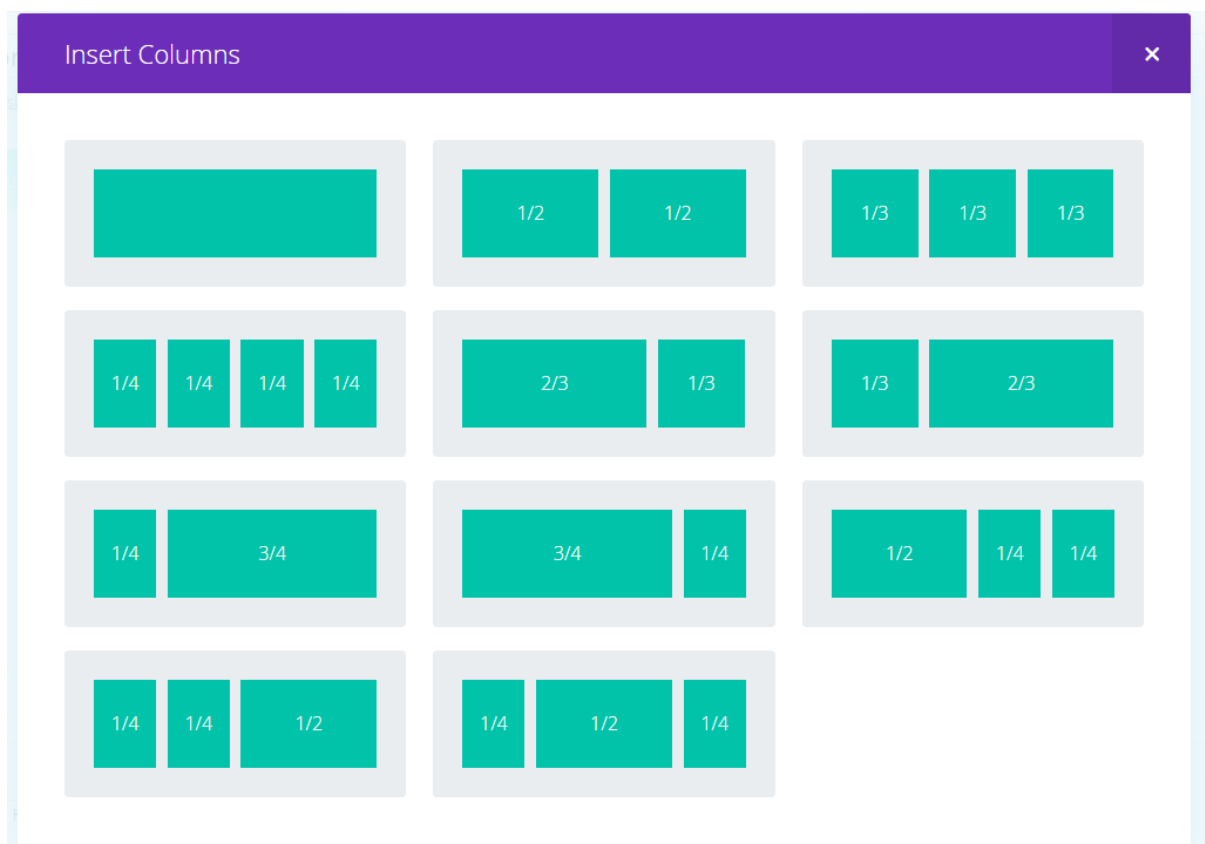
Once you have a layout chosen, choose to add a Text module by clicking the "Add Module" button within the layout section where you want to add the text. Then type in the text and save and exit the module. ****If you are copy text from a Word doc, it is best to first paste it into Notepad to strip out any styling before pasting it into the text editor window. **Remember to keep the text line width less than full page width when possible.**

To add an image use the Image module. And within the module choose to upload an image and either choose one from the Media Gallery or upload one. ****Be sure to include a short description in the "Alt**

Text" field for all images. Also, please only use purchased images. If you use an image taken by staff of staff or clients, also be sure to obtain a photo release for any recognizable face.
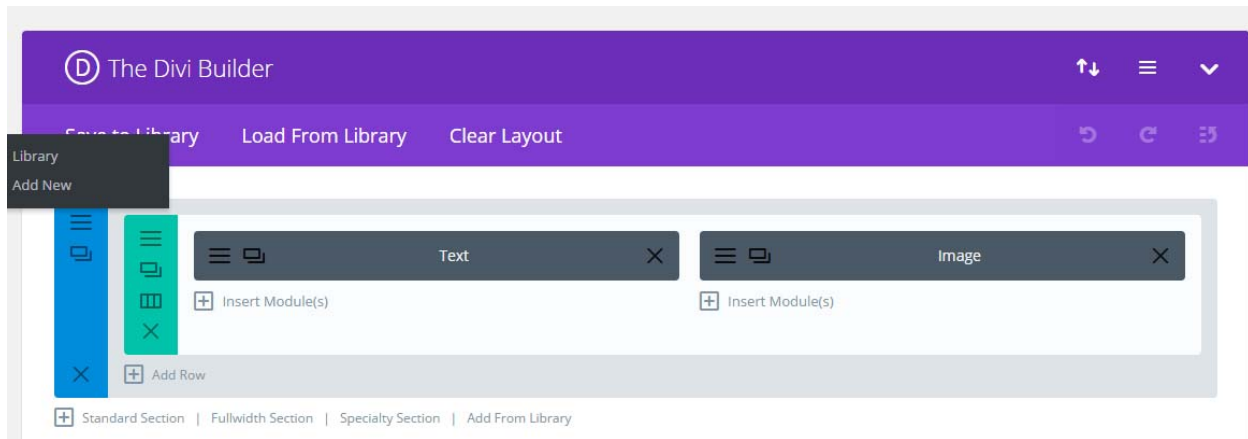
To preview your page you can at any time click the "Preview" button on the right under the Publish heading. This will show you the full page.

As an admin, you can publish pages directly by clicking "Publish." But you can also use the workflow by clicking "Submit to Workflow" for review and approval of the page. If you want to save and finish the page later, click the "Save" button. This saves a Draft version and the Status will remain Draft until you revisit the page and click either Publish or Submit to Workflow.
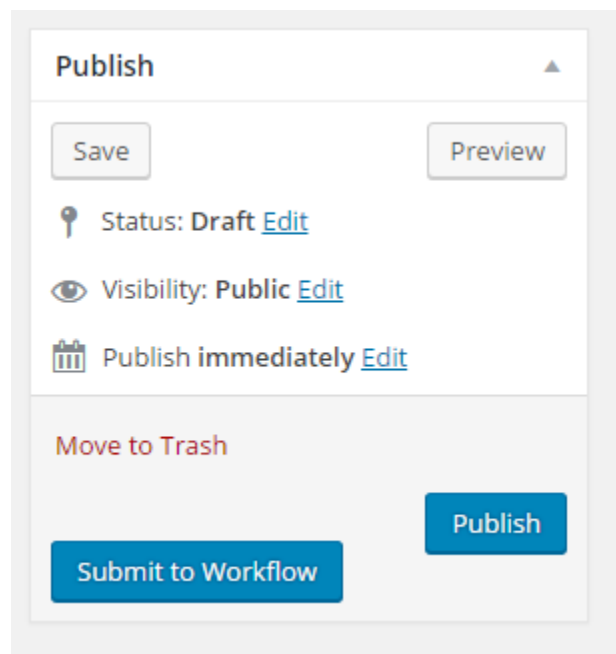
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You can also make a page private (only seen by those logged in to the system) or password protected by adding a password.

If you use the password protected functionality, anyone visiting the URL of the page will be prompted to enter the password before viewing it.

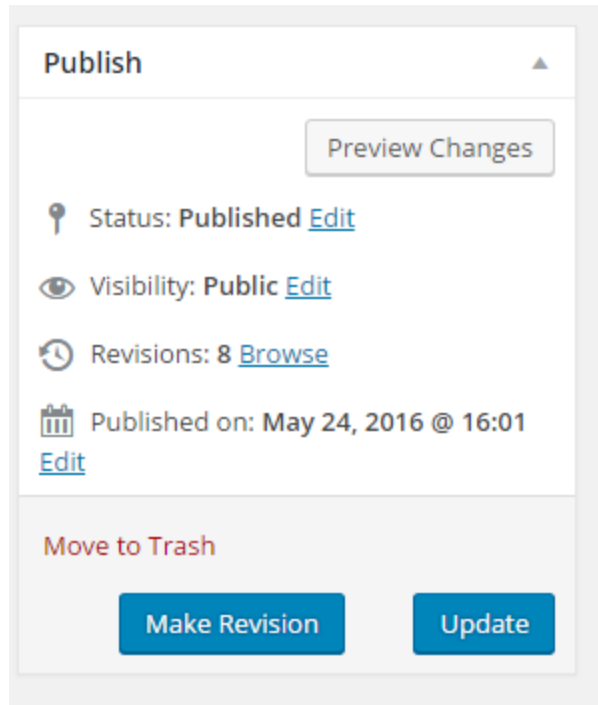Once a page has been published, the Status is changed to Published and there is no "Save" button anymore. To make an update directly and publish it again, make your edits and then click on the "Update" button. To make page edits and to use the workflow, click the "Make Revision" button. This will make a copy of the page and once approved it will overwrite the original.
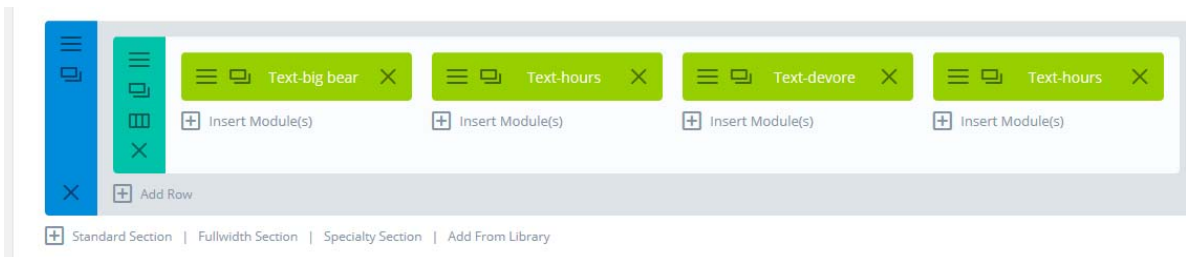
Edit a Page:

To edit a page you can either click the "Edit" link or the "Make a Revision" link under the page in question. To edit directly use the Edit link. To make a copy and use the workflow, use the Revision link.

Edit Content in Global Module:

If you see a content module colored lime green that means the content resides in the Divi Library and is globally available, such as the ACC location information for shelters, the EHS side navigation menu, and the Search/Quick Links boxes. So any update you make to it will be reflected anywhere this same content module has been added on the site. Refer to the Divi section below for a list of all global modules.

Double-Booking:

If someone else is already editing a page, you will see a warning in the dashboard like the below image. You can't edit a page that someone else is editing. Once they have exited the Edit Page page, you can choose to edit it.
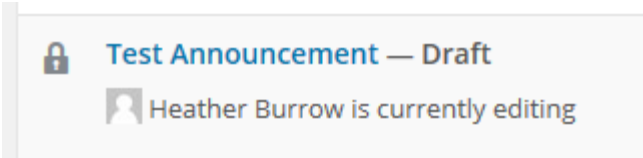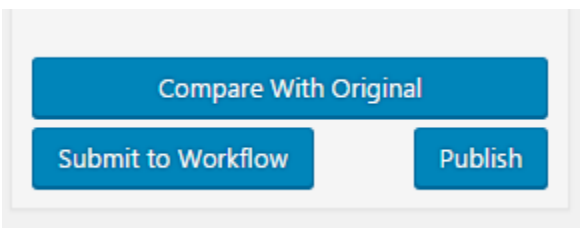
Using the Workflow:

Contributors only have adding and editing capabilities so they see a "Submit to Workflow" button only. As an admin you can also review, approve, and publish content.

Submit to Workflow:

To use the workflow, choose the "Submit to Workflow" button and then you will see a "Submit" pop up window.

#1 By default the "DPH Workflow" is chosen as the workflow. Leave as-is.

#2 Choose the priority level—the default it "Normal"

#3 Assign a team to review the page from the dropdown list. This will send the chosen team an email notifying them of the submittal and assignment.

#4 Choose a due date—the default is tomorrow

#5 Add any comments for the reviewer

#6 Click "Submit"

This activates the approval process and from here the selected team's approvers will take over because they have received an email notification.

With the selected page submitted to the workflow, the submit button is no longer visible for the page. And a second "Copy of –[page name]" is listed for all pages going through the workflow.

Approve Content:

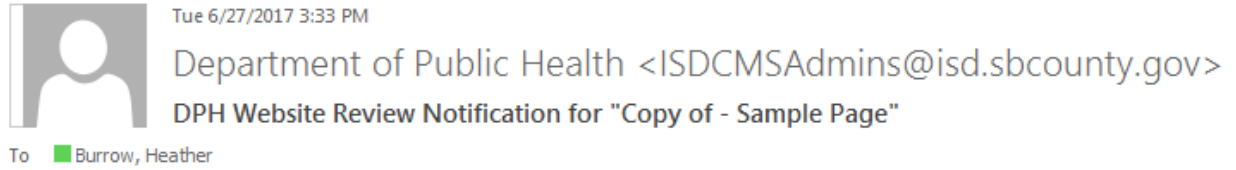If the workflow is chosen, it is most likely that a contributor submitted a page for review by an editor or admin like you. You will receive an email that says there is content ready for review. If more than one editor was chosen, all get the notification email and any one of them can go in and review and approve it. The contents of the email will look similar to the one below:

Tue 6/27/2017 3:33 PM

Department of Public Health <ISDCMSAdmins@isd.sbcounty.gov>

DPH Website Review Notification for "Copy of - Sample Page"

To   Burrow, Heather

Dear Heather,
A webpage (Copy of - Sample Page) is ready for review and you have been assigned the review task.

Additionally, Heather Burrow added the following comments:

I added an image. Please review.

Priority : Normal

Sign off date : June 27, 2017 3:33 pm
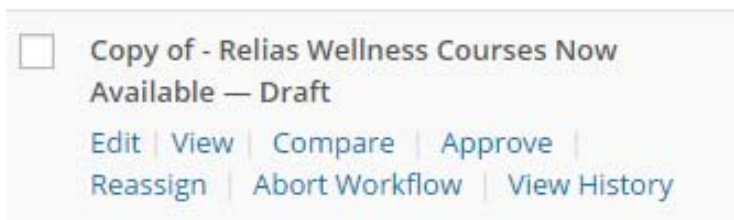
Due Date : June 28, 2017

#1 Navigate to the Workflow Inbox

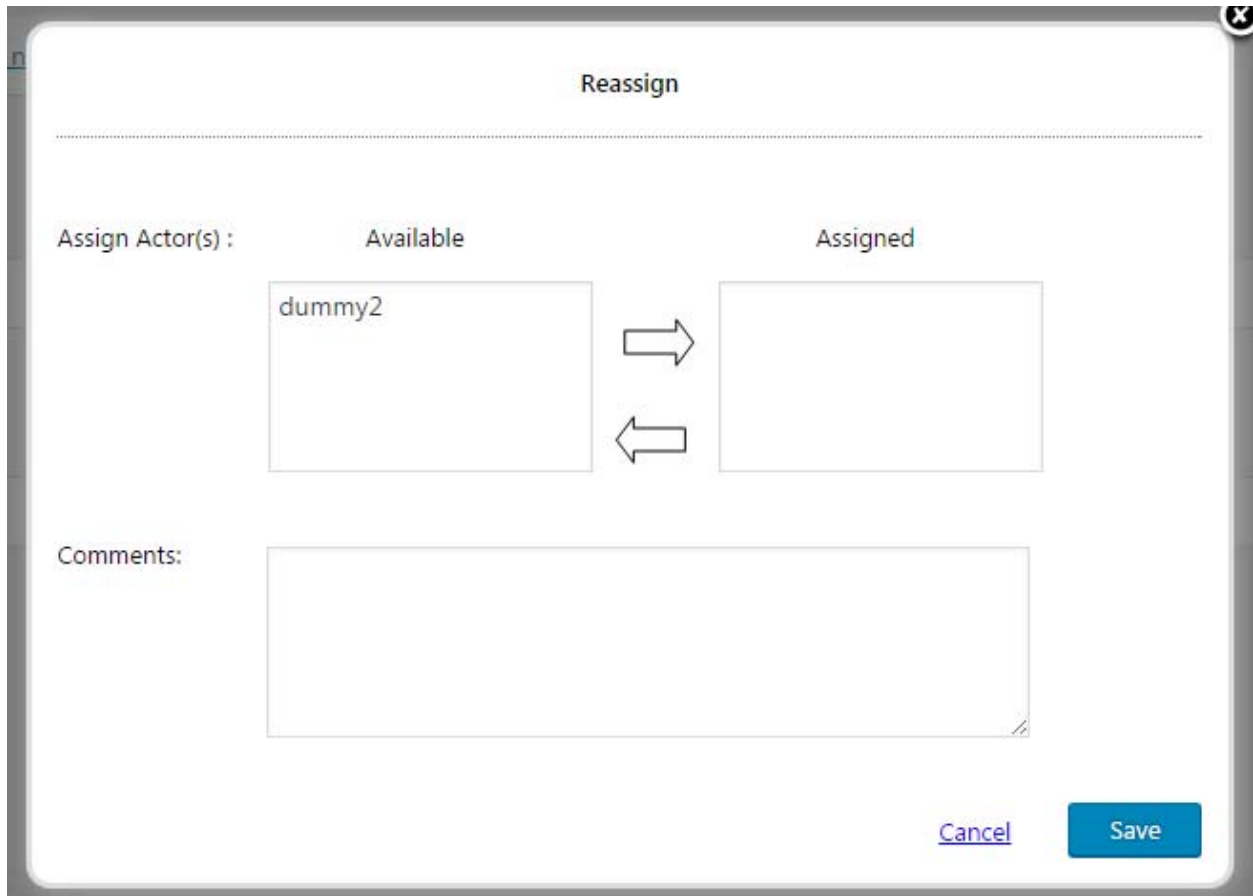#2 You will see any assignments that have been assigned to you

Inbox							
View inbox of ▼ Show							Displaying
☐ Post/Page ▲	Priority ▲	Type ▲	Author ▲	Workflow [Step]	Category	Due Date ▲	Comments
☐ Copy of - Sample Page — Draft	**Normal**	Page	dummy2	DPH Workflow (1) [review]	----	June 28, 2017	0
☐ Post/Page ▲	Priority ▲	Type ▲	Author ▲	Workflow [Step]	Category	Due Date ▲	Comments

From here you can also read the comments associated with the submittal by clicking on the comments icon. **To see all current assignments and current statuses, click the "Reports" submenu item on the sidebar.

#3 Hover over the title of the page you want to review and you will see a submenu

☐ Copy of - Relias Wellness Courses Now
Available — Draft

Edit | View | Compare | Approve |
Reassign | Abort Workflow | View History

#4 If needed, choose at any time to "Reassign" this assignment to another editor within your team and choose from the list of approvers within your team and optionally add a comment. Those selected will get a notification email. (Only those assigned to the item can reassign it and you can only choose someone else on your team.)


#5 Choose to "View" the page to see the changes by the contributor. Once done, close the extra window.

#6 Within the Inbox, if you want to edit the page some more, click the "Edit" link and compare it with the original if needed.
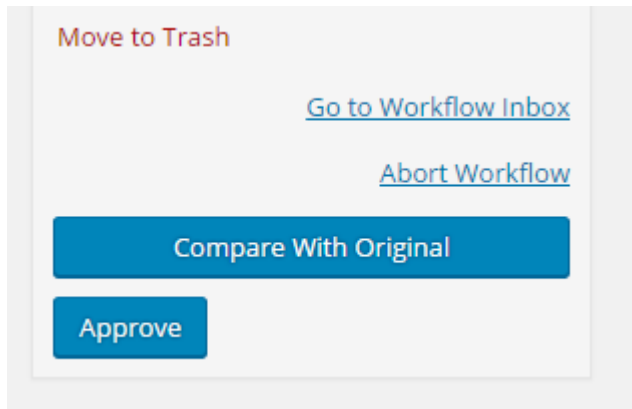
#7 If no additional edits are needed, then click the "Approve" link under the page within the Inbox or within the page editor window.

#8 Within the "Approve" window, choose "Approved" from the dropdown the Action field. You will see a message notifying you of the publish process. Click "Approve." This will complete the workflow and publish the changes. If the item is being republished, this will take the "Copy of" item and use it's content to overwrite the original and the "Copy of" will be deleted. And the assignment will disappear from you Inbox.
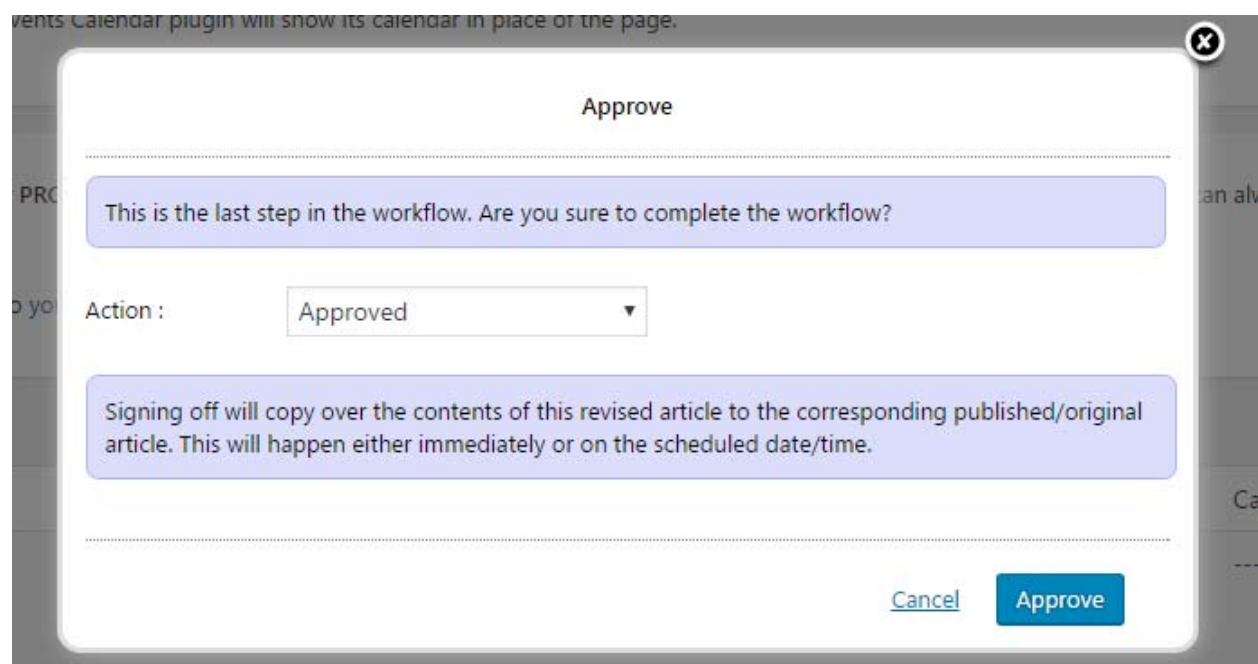
To Reject the Approval:

If you choose instead to "Reject" within the Approval step for the workflow, the workflow approval step will be cancelled. The second "Copy-of" of the item will remain within the list of items. And the copied item will need to be submitted to the workflow again. If at anytime you choose to "Abort the Workflow," the item is removed from the workflow process altogether.
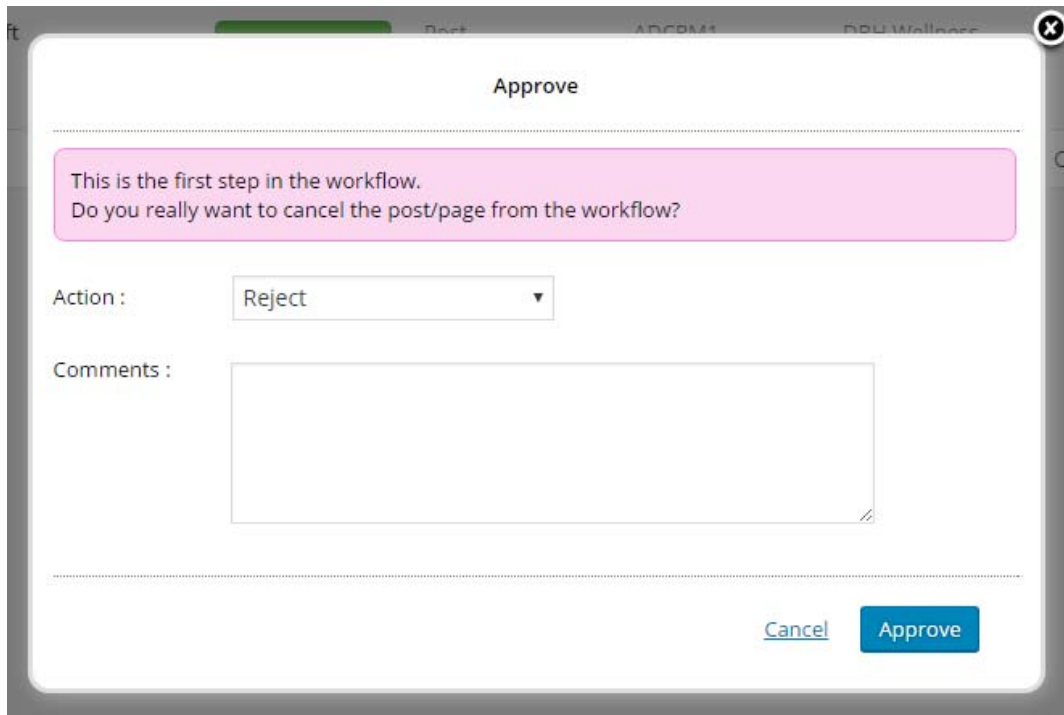
Abort a Workflow:

At any time, a workflow can be aborted by clicking "Abort Workflow" under the item in the Inbox or within the Publishing section on the editing page. You will be prompted, say "yes" and the item will be removed from your Inbox and the workflow process. If the item has never been published, then it will remain a draft. If the item has been published, the edits will remain unpublished.

See the Workflow section for more details about the workflow.
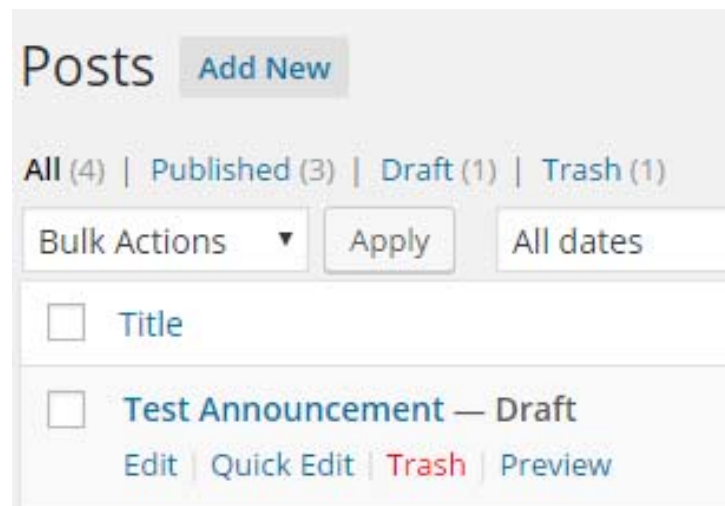
See the Revision History for a Page:

At any time you can see the history of edits to a page by clicking the "Browse" link next to the Revisions text. This takes you to a page where you can compare recent changes and restore previous changes.
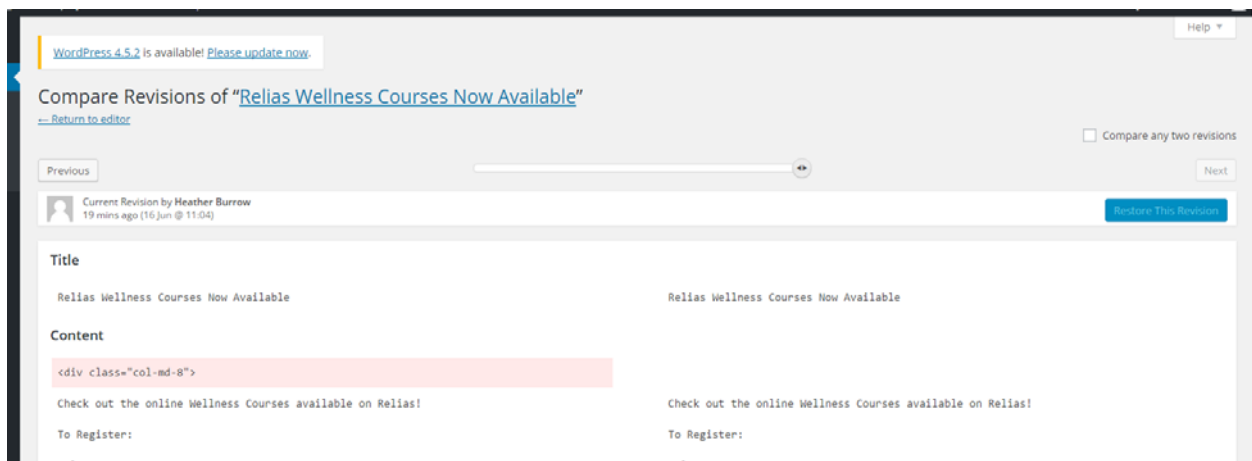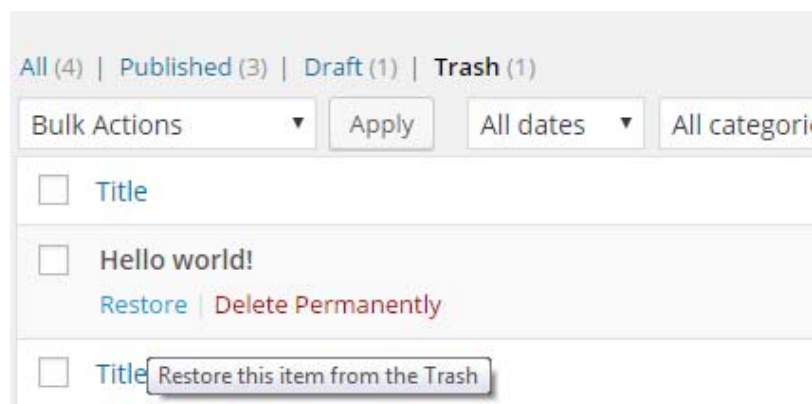
Delete a Page:

At any time if you want to delete a page, click the "Trash" link under the page within the Dashboard.

Restore a Deleted Page:

To restore a deleted page, click on the "Trash" link at the top of the Page Dashboard. This takes you to a list of deleted pages. Click on the "Restore" link under the page that you want to restore.

10. Comments
Comments have been disabled for this site.

11. Projects
The Projects plugin is not being used at this time.

12. Workflows
Once you have clicked on the "Workflows" link on the side bar, you will see an Inbox of your assignments. There is currently only one workflow for this website. Once an item is submitted to the workflow, there is a review stage and then an approve/publish stage. Contributors are able to submit to the workflow because they cannot publish. Editors and admins can review and approve/publish. Currently, pages, posts, and events can be submitted to the workflow.

For more information about the Workflow plugin,
https://www.oasisworkflow.com/documentation/basic-concepts.

View Workflow History:

To view the history of workflow usage, click on the "Workflow History" link on the side bar. You can filter the list, choose from the dropdown menu a select page/item that has a workflow, download the history report, or delete the history.

Title ▲	Actor	Workflow(version) ▲	Step	Assigned date ▲	Sign off date	Result	Comments
Sample Page	Heather Burrow	DBH Wellness Workflow (1)	publish	June 15, 2016 11:47 am	June 15, 2016 11:47 am	Workflow completed	0
Sample Page	Heather Burrow	DBH Wellness Workflow (1)	review	June 15, 2016 11:45 am	June 15, 2016 11:47 am	Approved	1
Sample Page	ADCRM1	DBH Wellness Workflow (1)	Submit to Workflow	June 15, 2016 11:45 am	June 15, 2016 11:45 am	Submitted	1
Title ▲	Actor	Workflow(version) ▲	Step	Assigned date ▲	Sign off date	Result	Comments

View Current Statuses:

To view current assignments and submissions, click on the "Reports" link on the sidebar.

Title	Type	Author	Date
TEST of Super Contributor	tribe_events	ADCRM1	June 8, 2016 2:41 pm
Test Announcement	post	ADCRM1	June 16, 2016 11:48 am
Title	Type	Author	Date

Workflow Settings:

To manage the settings for the workflows, click on the Settings link under Workflows on the side bar. I do not recommend making any changes here unless you know what you are doing.

Use a Workflow:

For more information about using a workflow, see the Post section above.

13. Appearance

Within the Appearance section of the sidebar are the main theme settings.

Themes/Customize:

The theme for this website is "WP Bootstrap Modified DPH Child." Do not choose to change any of the basic settings within the "Customize" section, as this will affect the design of the site.
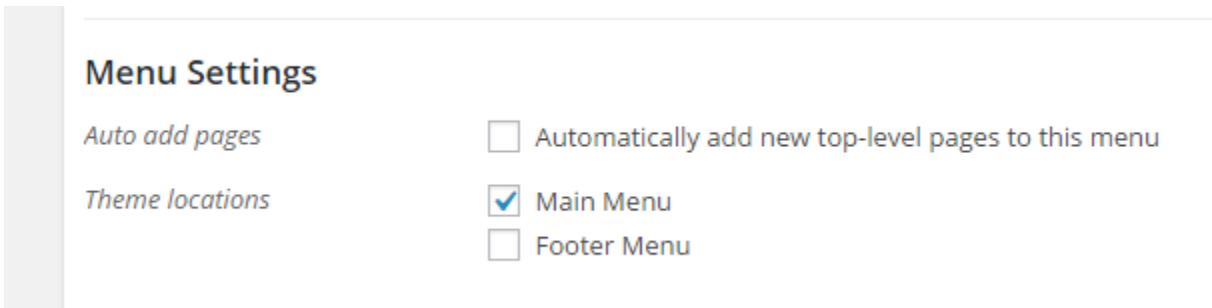
Widgets:

The site uses no widgets.

Menus:

There is one navigation menu created. You can drag items to change order or location. Click on the arrow to expand the setting for any item to change its shown name or to delete it.
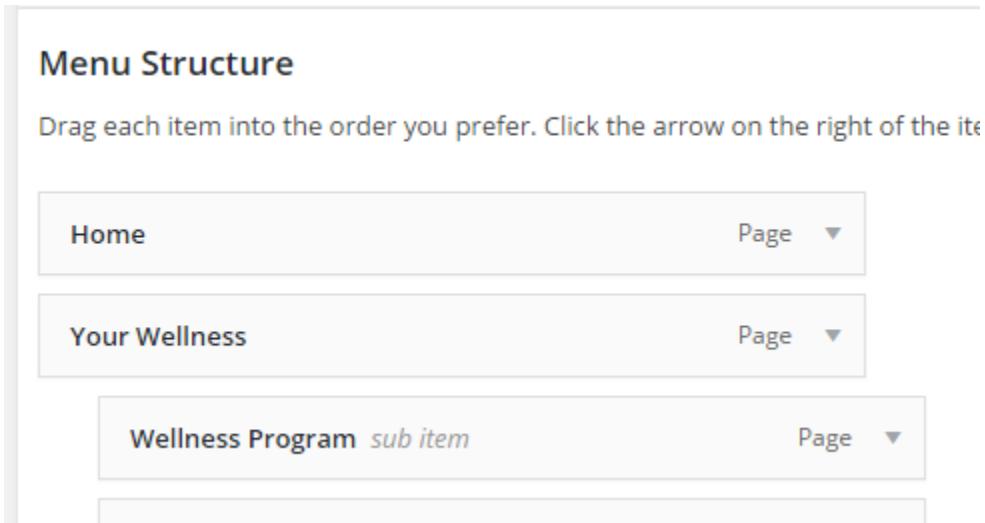
Currently, the top menu is not set to add new top-level pages to it automatically. You must manually add any new item.

Header:

This is where the header image has been uploaded.

14. Users

As an admin you have the ability to add and delete users from the site. To do this, navigate to the "Users" section on the left-hand side menu. You will see a list of DPH users, while ISD users will not be listed.

To Add a User:

Click on the "Add New" button at the top of the page.

Once in the "Add New User" window, make sure you enter the information in the "Add New User" section within the bottom half. Type in the employee's username as their employee ID (using only lowercase letters) and enter their email address. Choose their role accordingly (either Contributor, Editor or Admin—see below for more info). Then click "Add User" button.

This will send an email to the user asking them to click on the link to confirm and set a system generated password. Once they do this, the account will be created in the system and seen by admins.

Once the person has been added, click the "Edit User" link. Within the Edit User window. Add their first name and last name and choose to display their full name. Then click the "Update User" button

To Delete a User:

Hover over the user, and click on the "Remove" link and follow the prompts. This removes the user from this website, but not from the WordPress installation.
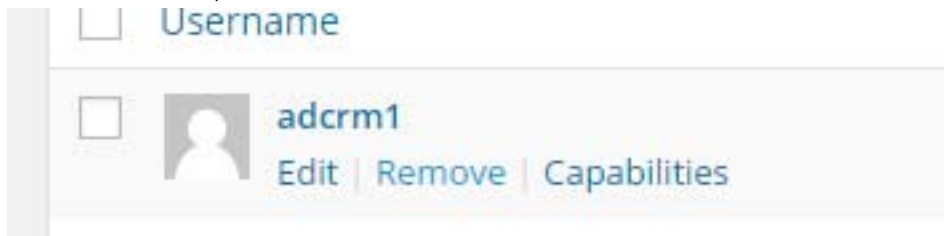
Role Levels and Responsibilities

Contributor:

A contributor has the ability to delete posts and pages, edit posts and pages, manage categories and links, and upload files.

Editor:

An editor has the ability to delete and edit posts and pages, manage categories and links, upload files, and publish posts and pages.

Administrator:

An admin has the ability to delete, edit, manage, and publish almost everything. As well as add and delete users. They have access to all the admin features for one site.

For more information on WordPress roles, https://codex.wordpress.org/Roles_and_Capabilities.

15. Tools

This section can be ignored.

16. Settings
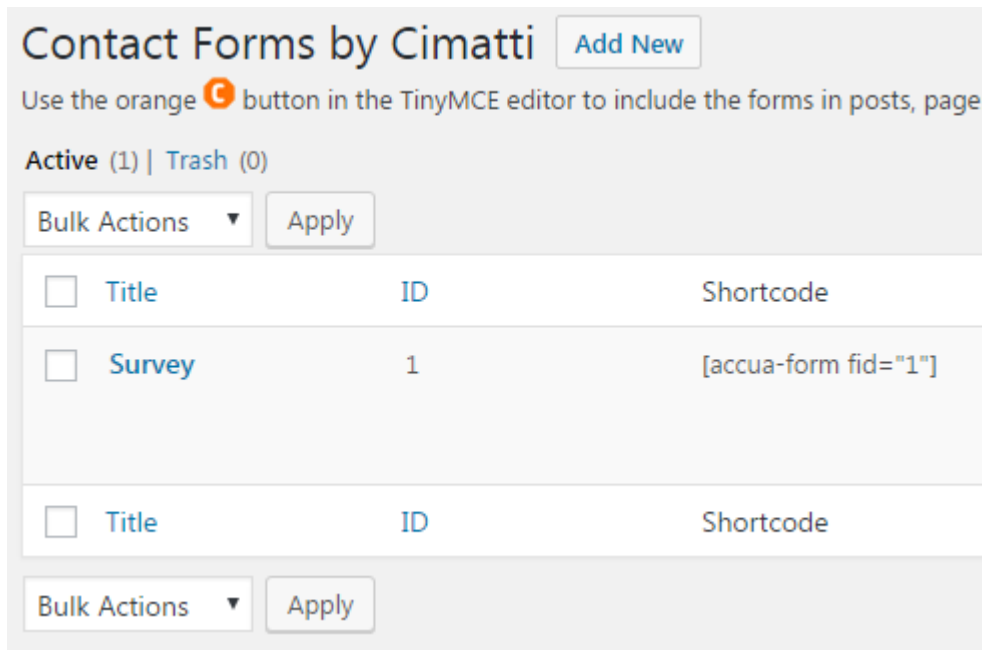
This section contains the basic settings for the site. Please do not alter.

17. Forms

This is where you can modify the information for forms used, including advanced contact forms and surveys. Only Admins can edit these advanced forms.

To modify a form:

1. Click the Forms menu item and from the list choose to "Edit" the chosen form

2. Expand the field you want to edit. And make any edits. Make sure to click "Save" at the bottom of the toggle to save your changes.

Form fields

Drop fields here

When I call the Purchasing Department for assistance, the staff is (Please check all that apply):

Label: (override: ☐)

When I call the Purchasing Department for assistance, the staff is (Please check all that apply):

Default value: (override: ☐)

Allowed values: (override: ☐)

Knowledgeable
Courteous and helpful
Happy to hear from me

The possible values this field can contain. Enter one value per line, in the format key|label. The key is the value that will be stored in the database. The label is optional, and the key will be used as the label if no label is specified.

3. To change message settings, click the second tab at the top labeled "Messages."

When a survey is submitted, the email will look like the sample below:

On 1 November 2016 the following form was filled in.

When I call the Purchasing Department for assistance, the staff is (Please check all that apply):
Knowledgeable, Courteous and helpful, Happy to hear from me
Do buyers respond to your emails and phone calls promptly?:
Yes
What is your opinion regarding the customer service you have received from the San Bernardino County Purchasing Department?:
Needs some improvement
When you contacted the San Bernardino County Purchasing Department, were your needs met?:
Yes
On average, how often do you use social media (Facebook, Instagram, Twitter) to promote or conduct your business?:
Once a day
How likely are you going to continue to pursue doing business with San Bernardino County?:
Very likely
Please provide us with suggestions on how we can improve service to potential and current vendors:
This is a test of the survey form.

Add New Form:

To add a new form, click on the "Add new" from the sidebar under the Forms section. Click the "Add New" button. Fill out the form areas as needed. Once done, copy the PHP code shown on the dashboard for the form on to the page where it should appear. For more information, https://wordpress.org/plugins/contact-forms/.

Manage Form Fields:

To manage form fields, click on the "Fields" link on the sidebar. From here you can add new fields to be used in forms or edit existing fields.

Settings:

Please do not alter the settings for the forms.

View Submissions:

1. To view all submissions within WordPress, choose "Submissions" from the Forms menu.
2. At the top you can choose to filter by form or year.
3. You can also change the columns shown by using the "Screen Options" tab at the top of the window. Uncheck the columns you don't want to view.
4. You can export the information to Excel using either blue button at the top.
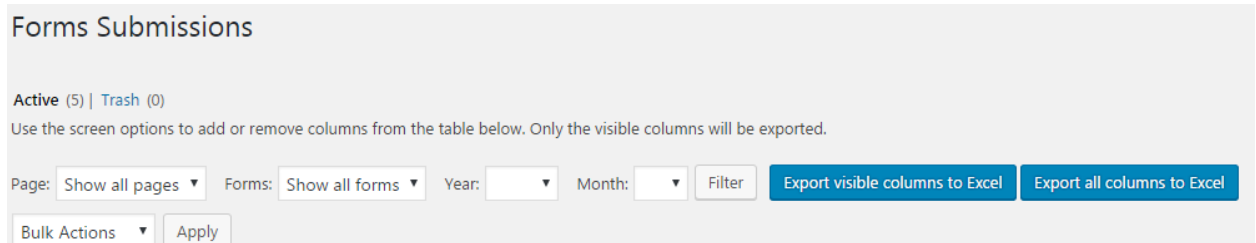
18. WonderPlugin Slider
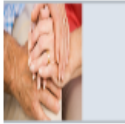
This plugin is used for the homepage rotating slider. Only Admins and Editors can edit it.

To Edit the Slider:

1. Click the "Manage Sliders" item from the plugins menu.
2. Click the "Edit" link under the chosen item from the list
3. Within the first tab labeled "Images & Videos" you will see a list of the slides. Choose which slide you need to edit and choose "Edit" under it.
4. Within the popup window make changes as needed.

Add image

Enter image URL http://wp.sbcounty.gov/dph/wp-content/uploads/sites or Upload

Thumbnail URL http://wp.sbcounty.gov/dph/wp-content/uploads/sites or Upload

Title Cancer Screening

Description Colorectal cancer is one of the leading cancer killers in the U.S.

Img alt text ☑ Use Title as img alt text. To use a different text, uncheck the option and enter it below:

Button text Find a health center near you CSS: as-btn-blue-medium ▼

Button link http://wp.sbcounty.gov/dph/progran Target:

Text Effect ☐ Choose a special text effect for this slide Color box right align ▼

Click to open Lightbox popup ☐ Open current image in Lightbox
☐ Set Lightbox size 960 / 540

Click to open web link http://wp.sbcounty.gov/dph/programs/clinics/clinic-locations/

Set web link target _self ▼
☐ Open web link in Lightbox

OK Cancel

5. Alternatively, if you want to add a new slide, click "Add Image" and fill out the pop up window similar to the above screenshot
6. You can ignore the Skins and Options tabs. But if you want to see a preview of the slider in action, click the "Preview" tab.
7. Once done making edits, click the "Save and Publish" button. This makes the changes live on the website.

19. Mega Menu

This is the settings area for your main menu. Please do not alter any settings.

20. Divi

This is the settings for the Divi Builder plugin. Please do not alter any of the settings.

**Managing Replicated Content Using the Divi Library**

Some site content is managed through the Divi Library because it has been added to multiple pages and must be centrally maintained, such as the ACC location information for shelters, the EHS side navigation menu, and the Search/Quick Links boxes. Within the Divi Library you will see a list of all global modules and from here you can edit any of them as well.

21. Google Analytics

All contributors, editors, and admins will also see a "Google Analytics Dashboard" on their "Dashboard" page. This module can be dragged and dropped anywhere within the page. And different timeframes and properties can be chosen from the dropdown.
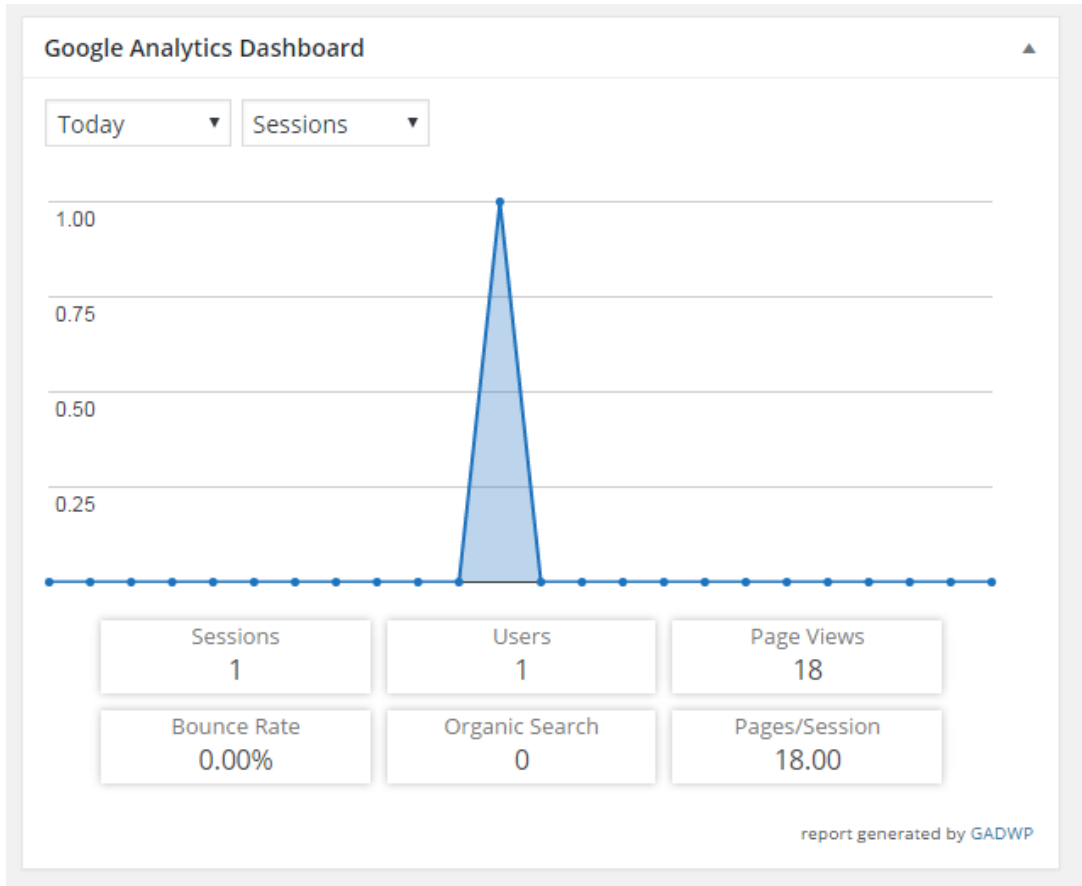
Also, within the pages module you can see analytics for a certain item by clicking the analytics icon within the list.
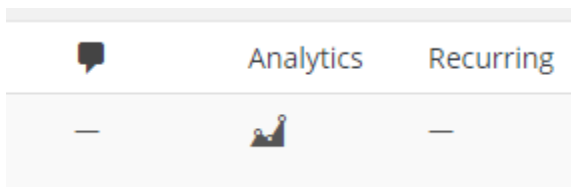
If you can't see the icon, then open the "Screen Options" tab and checkmark "Analytics."

As an admin, you can also see the "Google Analytics" settings. Please do not alter any of the settings.