

WordPress User Guide for Administrators

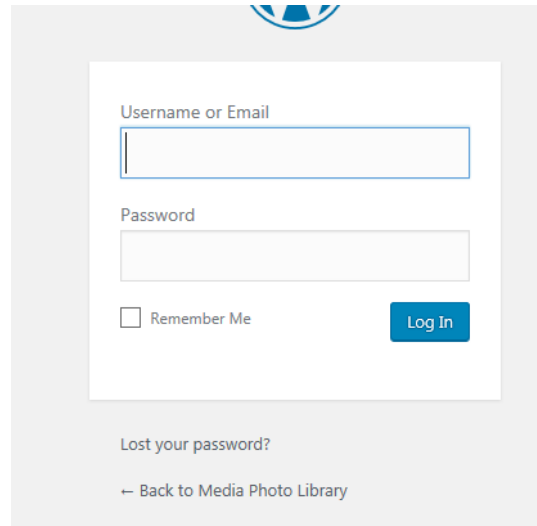
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1. Accessing the Site and Managing Your User Account

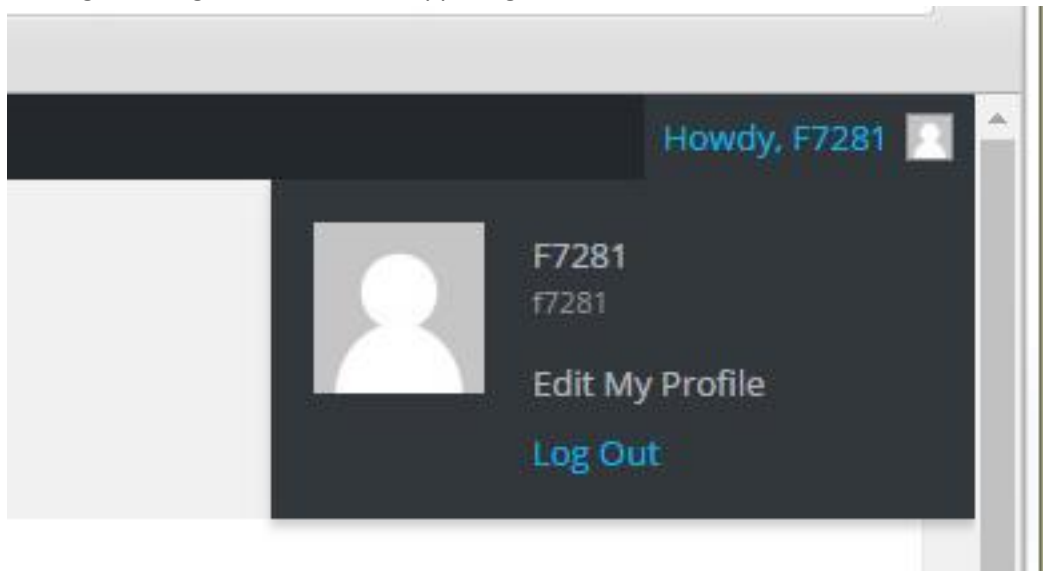
Logging In and Out:

You can login using <http://wp.sbcounty.gov/vision2bactive/login>



The login form is centered on a light gray background. At the top, there is a small blue circular logo. Below it, the form contains two input fields: "Username or Email" and "Password". Below the password field is a checkbox labeled "Remember Me". To the right of the checkbox is a blue "Log In" button. Below the form, there is a link "Lost your password?" and a link "← Back to Media Photo Library".

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 are setup with your username as your employee ID. Your password is system generated upon invitation to the site and can be changed when you log in for the first time or at any time within your profile section.

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.

Account Management

New Password

Generate Password

Sessions

Log Out Everywhere Else


You are only logged in at this location.

Account Management

New Password

UFZuHYJX\$YNibHqmxhkEihcs

×

 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

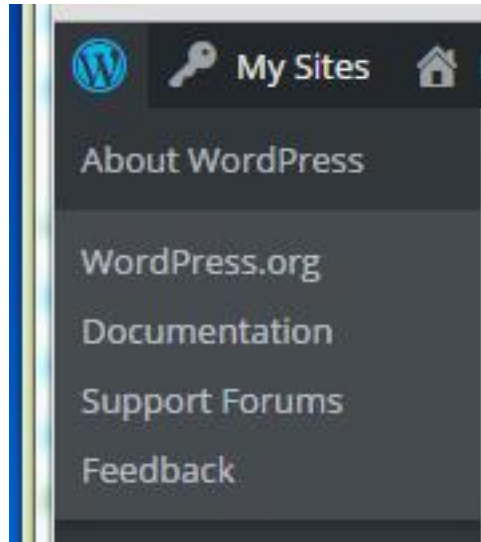
Log in

[← 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 by deleting it and typing in your own password.

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.

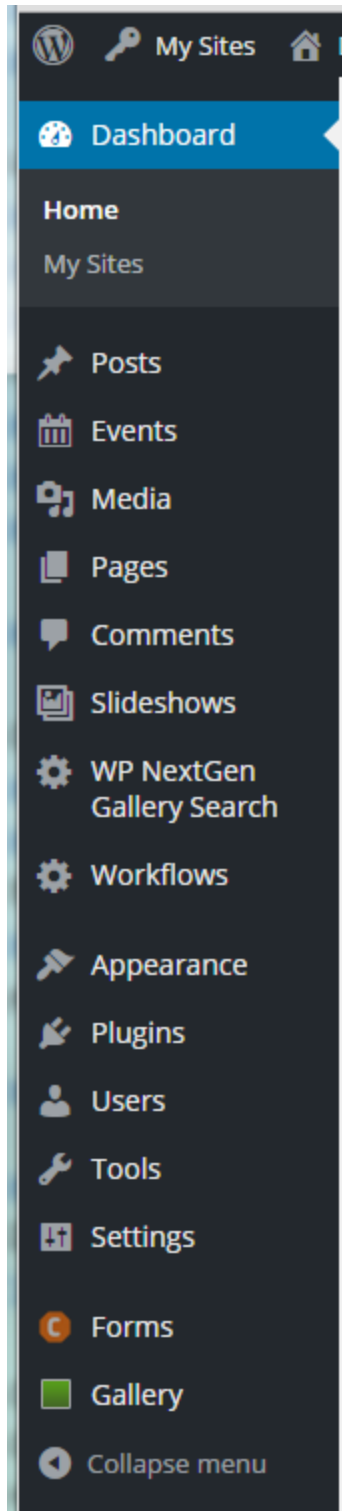
The current site you are viewing/editing will be listed next to the house icon at the top.



The dashboard is your first view into your site. It gives you the status of items at a glance.

4. Sidebar Menu

The sidebar menu is how you navigate the site on the backend. From here you can access all the different features that you have access to.



5. Posts

The Posts module is not currently being used for this website.

6. 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.

One place you can get free images is <https://openclipart.org>. Choose the small version of the image since it will be used on the web and it should be smaller than 800px.

Add Items to Library:

#1 You can add an item to the library by clicking the “Add New” button at the top of the library page.

#2 Then you can drag and drop files onto the page or use the “Select Files” button to browse for them.

*The maximum upload size for an item is 8MB. For larger files, please contact ISD at ISDADWebDev@isd.sbcounty.gov.

Sort Library:

You can sort and filter the library three ways:

#1 From the “All media items” dropdown choose to only view images.

#2 From the “All dates” dropdown choose a month and year to view of when the item was uploaded

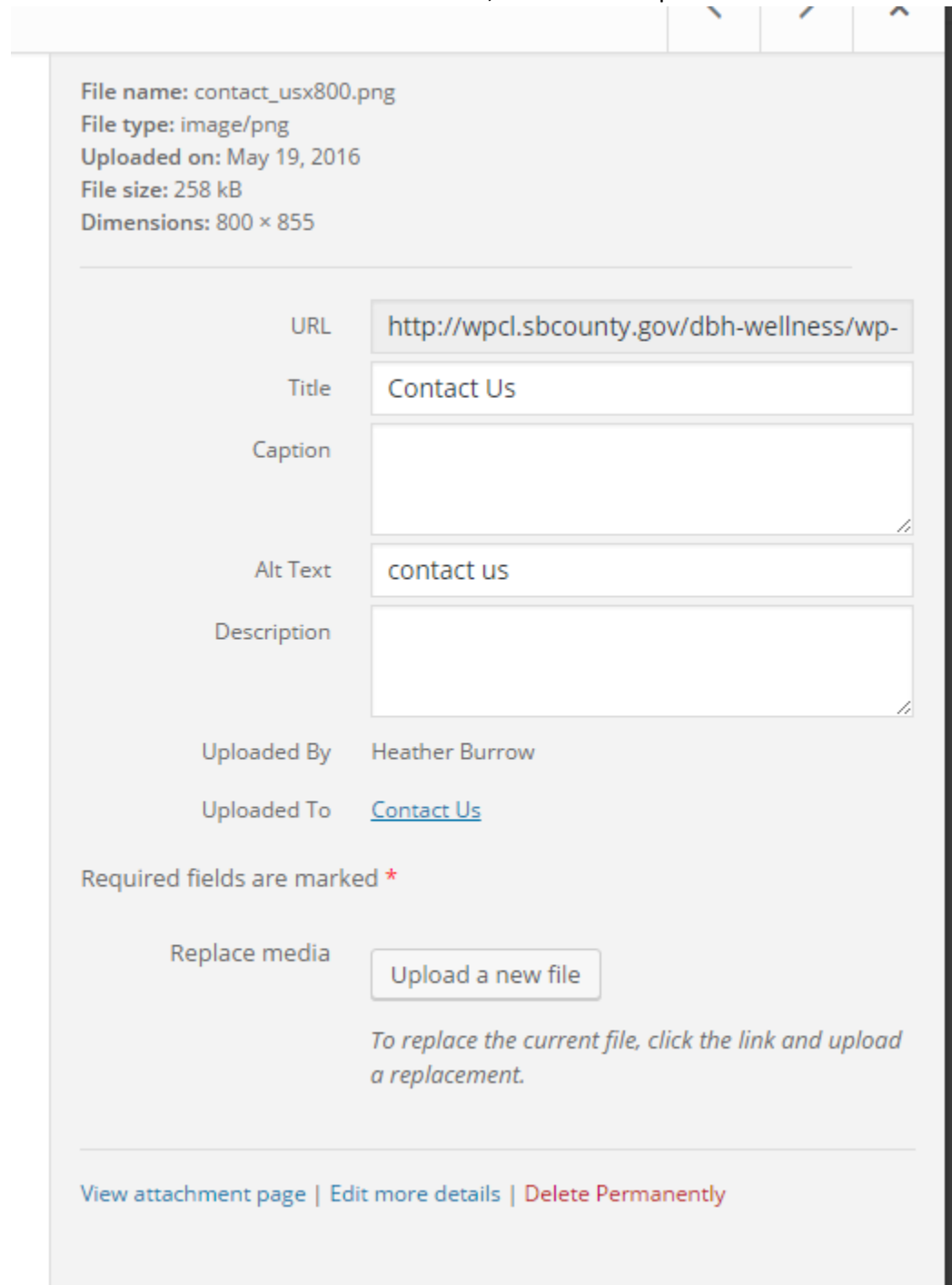
#3 Type in a search term to filter the list

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 post or 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



The screenshot shows a web interface for managing attachments. At the top, file details are listed: File name: contact_usx800.png, File type: image/png, Uploaded on: May 19, 2016, File size: 258 kB, and Dimensions: 800 x 855. Below this is a form with fields for URL (http://wpcl.sbcounty.gov/dbh-wellness/wp-), Title (Contact Us), Caption, Alt Text (contact us), and Description. The 'Uploaded By' field shows Heather Burrow and 'Uploaded To' shows a link to 'Contact Us'. A note states 'Required fields are marked *'. Under the 'Replace media' section, there is a button labeled 'Upload a new file' and a message: 'To replace the current file, click the link and upload a replacement.' At the bottom, there are three links: 'View attachment page', 'Edit more details', and 'Delete Permanently'.

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

URL
Title
Caption
Alt Text
Description
Uploaded By Heather Burrow
Uploaded To [Contact Us](#)

Required fields are marked *

Replace media
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 files 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

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.

[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 No spaces: Make sure the name of your document contains no spaces. If it does, it will result in “%20” being added to the URL for each space in the document. Instead, please use dashes or underscores in place of spaces within the name (i.e. = Name_of_document.pdf).

#3 New window vs. Same window:

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

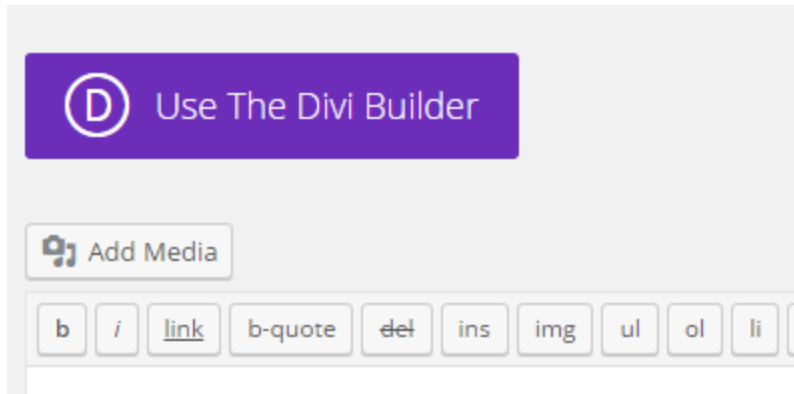
If the link is a webpage *outside* your site, it should open in a new window.

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

#4 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.

7. Divi Page Builder Plugin

Before we get in to each navigation menu item, let’s review the Divi page builder, as it is used within the other sections. The Divi Builder option is given at the top of Posts and Pages and looks like a big purple button.

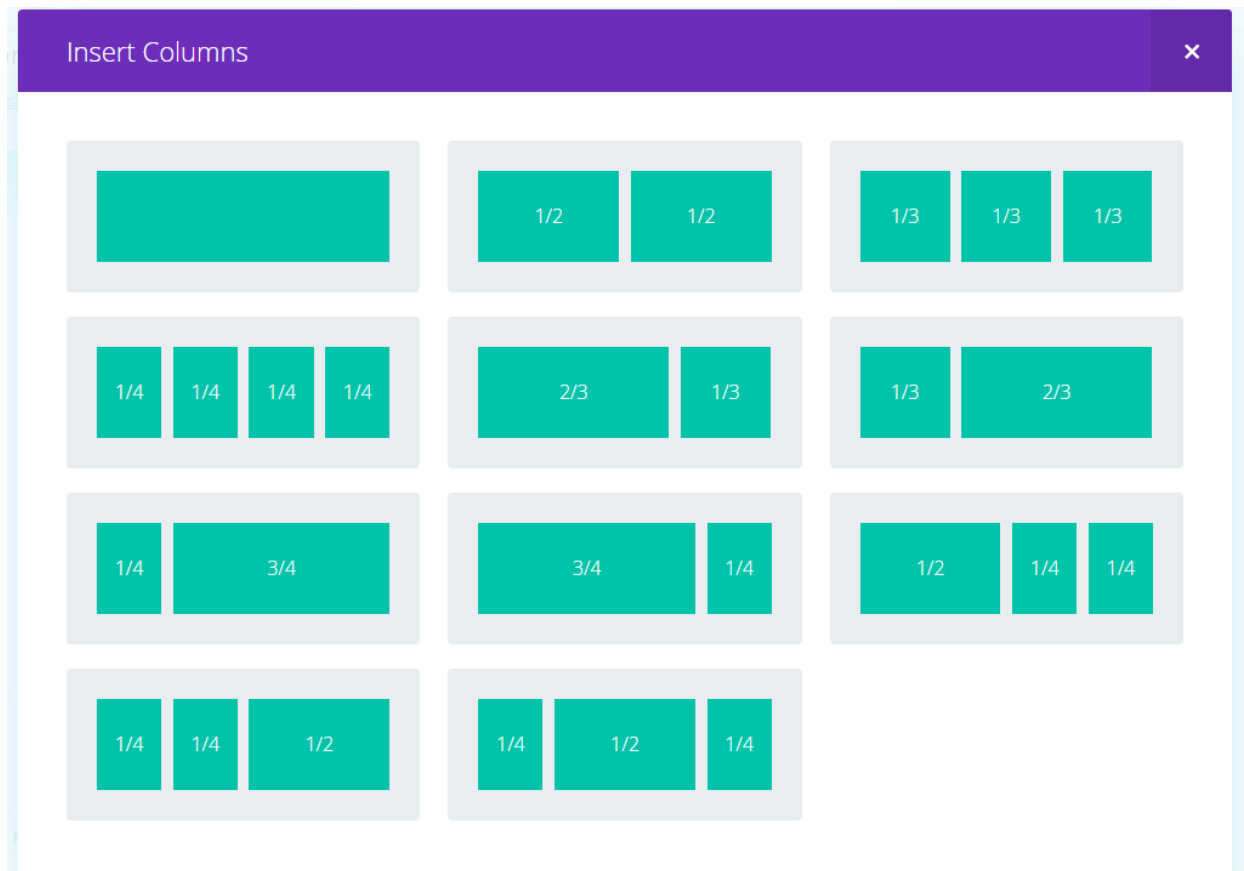


When clicked it swaps out the default content editor with a more advanced content editor that comes with pre-built in layouts and modules. If you choose to use the Divi Builder for a post or page that is already created, it will take the current content and insert it into a text module in a default layout that you will then have the ability to change and add to. If you are using the Divi Builder for a post or page and decided 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.

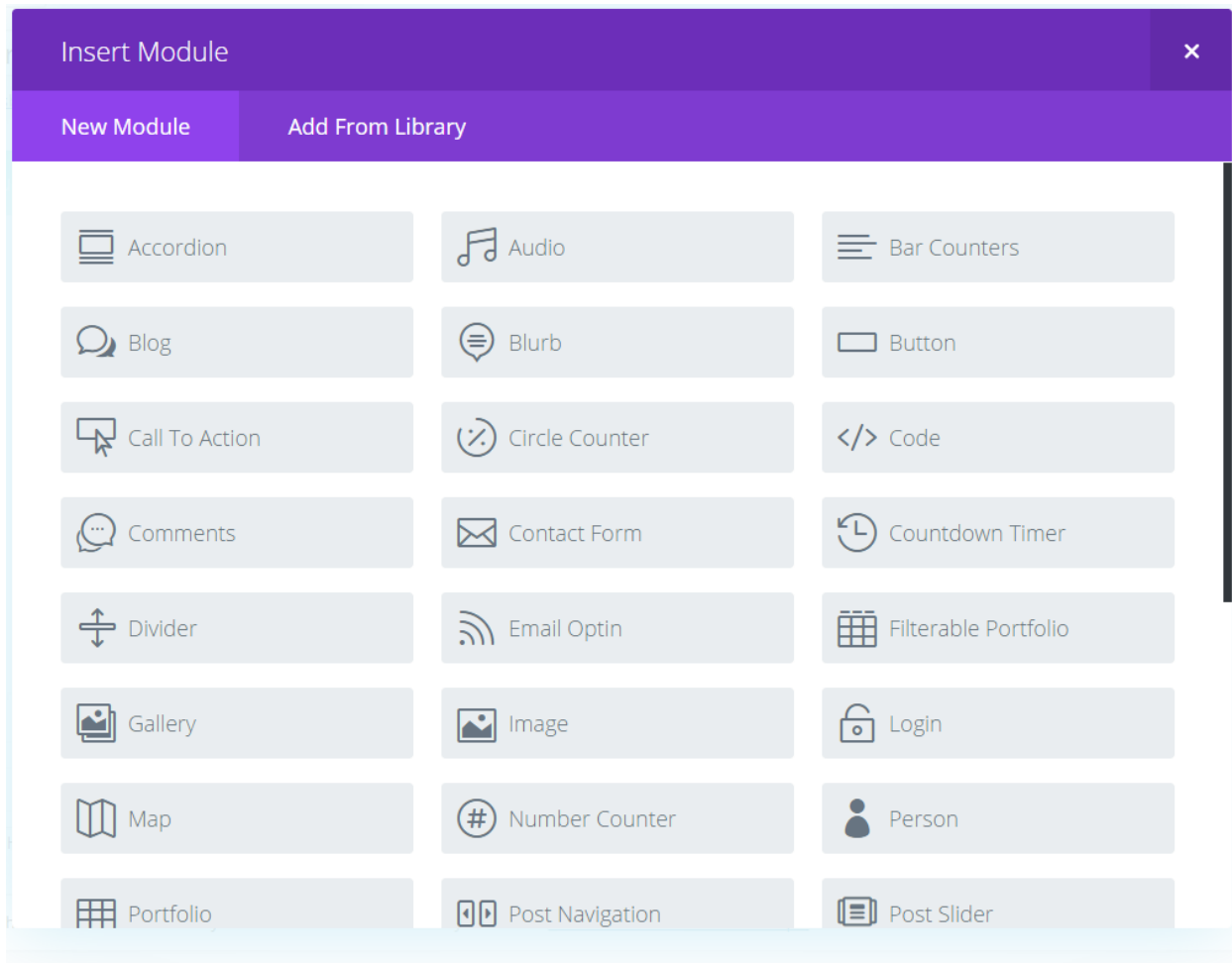
With the Divi Builder you can add out-of-the-box modules with extra functionality, clone content, lock content, hide content, add custom CSS, undo actions---all using the editor window's interface.

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

Once you have chosen to use the 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/>.



8. Pages

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

Change the Screen Settings:

Once again, once on the Edit page screen, open the “Screen Options” window and check mark: Revisions, Author, Page Attributes so that only these sections are visible.

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.

Create a New Page:

#1 Choose to “Add New” page

#2 Give the page a title and optionally change the permalink URL to something simpler

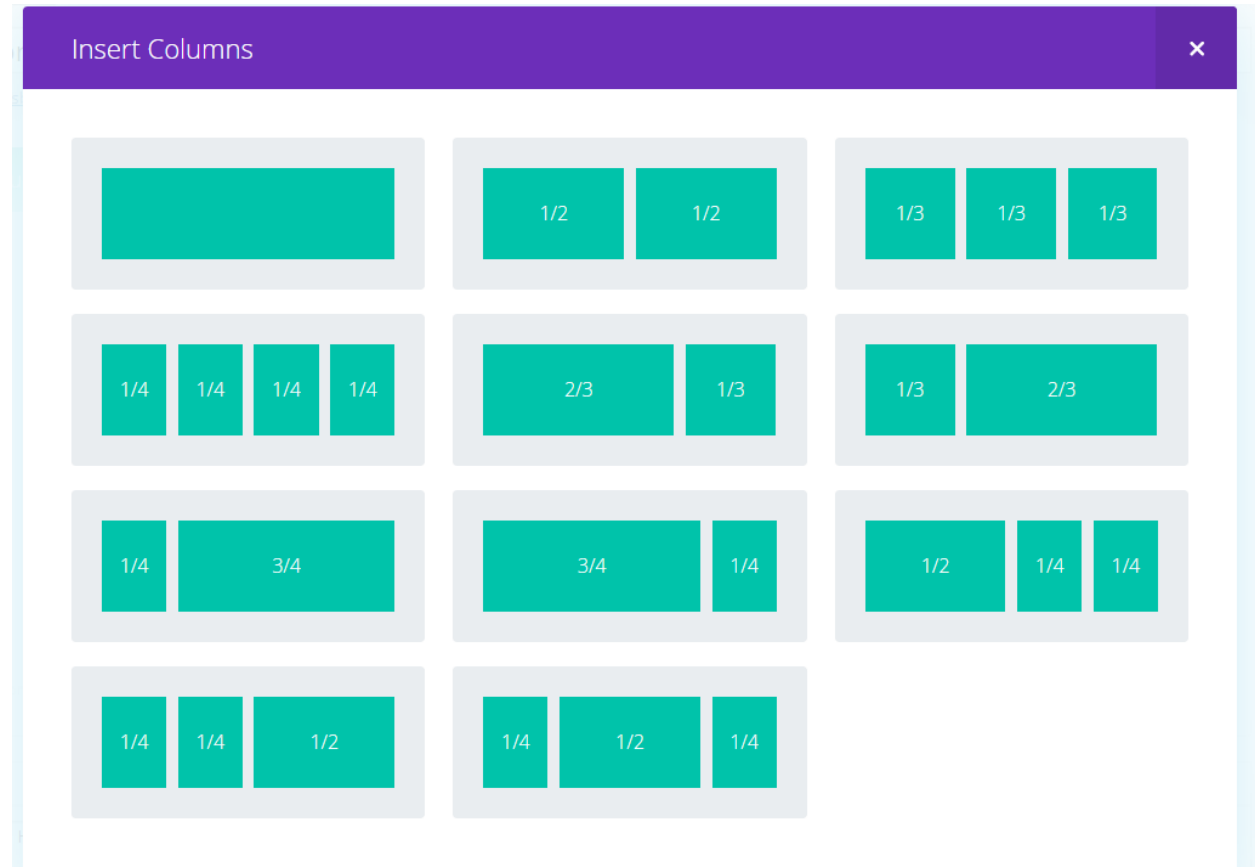
#3 Under Page Attributes, choose what page is the parent of this new one.

#5 Add content

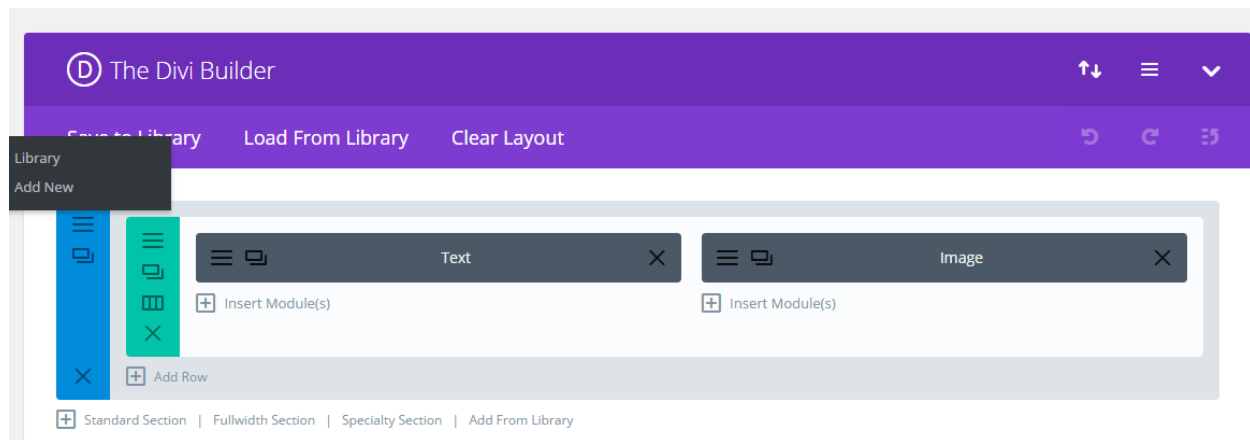
#6 When done, click “Publish”

Add Content to a Page:

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.

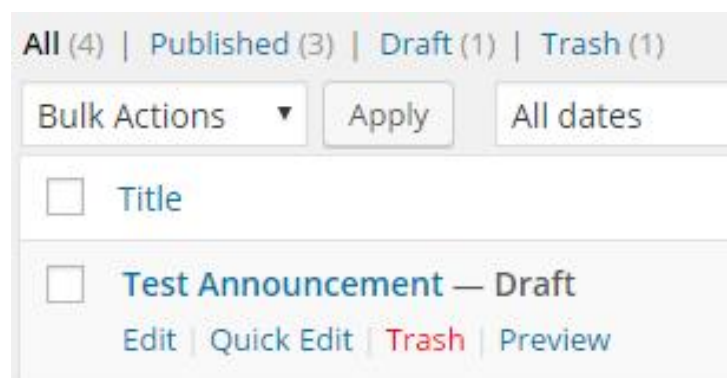


Once you have a layout chosen, choose to add a Text module by clicking the “Add Module” button within the layout section where you want to add the text. Then type in the text and save and exit the module.



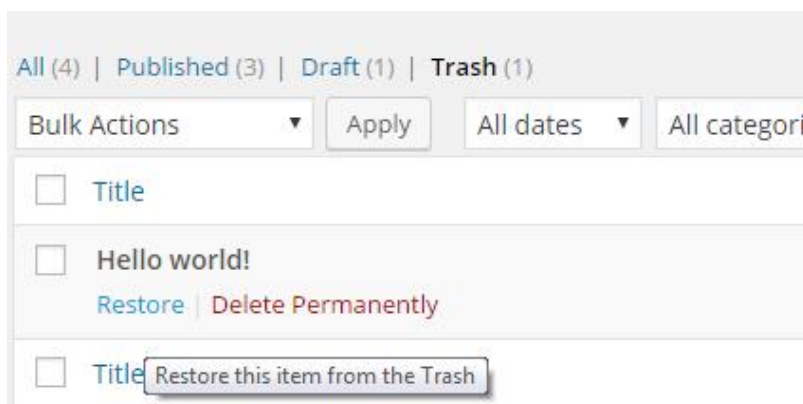
Delete a Page:

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



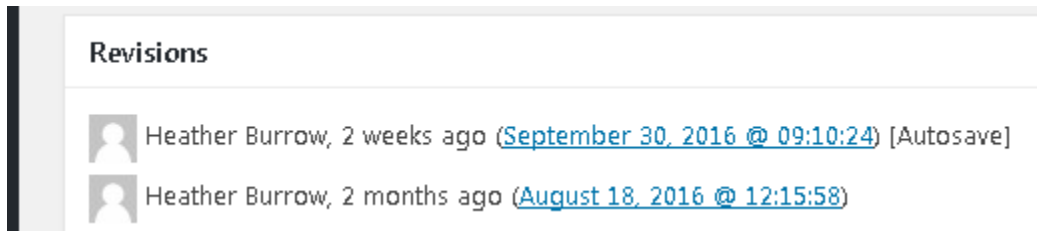
Restore a Deleted Page:

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.

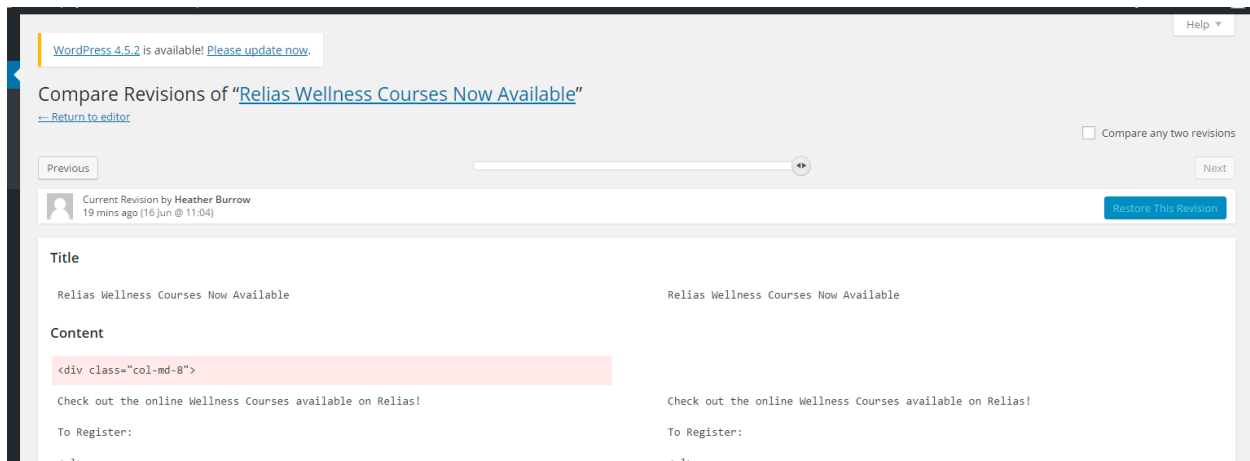


See the Revision History:

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.



9. Comments

Comments have been disabled for this site.

10. Slideshows

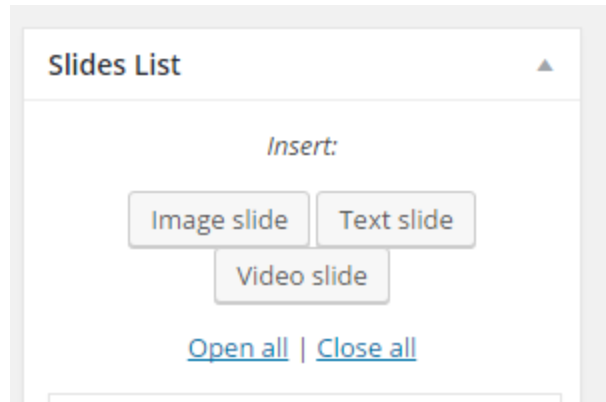
To create or edit a slideshow, click on the “Slideshows” link on the side bar. This will take you to the Slideshows dashboard. Currently, there is only one slideshow on the site—on the homepage.

Add Slide to Slideshow:

To edit the homepage slideshow, click on the “Edit” link under it within the list. The left-hand main area shows the settings for the slideshow. Please leave the settings as-is.

And the right-hand side shows the slides created.

#1 Add a slide—choose either the Image, Text, or Video option. (If choosing video, you will need a YouTube link).



#2 For an Image slide, add the image from the Media Library (choose to upload if needed once there)

Add a title and optional description for the slide

Add the URL if you want it to be clickable and linked to a page (choose to open the URL in a new window if the URL is not part of your site)

Add the Alternative Text (this is usually the same as the title)

#3 Click "Update" to re-publish the slideshow with the changes.

(To make a revision instead, see the Coordinator Guide)

Delete Slide:

To delete any slides, click the "Delete Slide" red link at the bottom of the slide.

General Settings:

Under the Slideshows menu there is a link for General Settings and other settings. Please leave these settings as-is.

General Settings

Default Slideshow Settings

Custo

User Capabilities

Select the user roles that will able to perform certain actions.

Add slideshows

☒ Administrator
☐ Author
☐ Contributor
☒ Editor
☐ Subscriber

Edit slideshows

☒ Administrator
☒ Author
☒ Contributor
☒ Editor
☐ Subscriber

Delete slideshows

☒ Administrator
☐ Author
☐ Contributor
☒ Editor
☐ Subscriber

11. Appearance

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

Themes/Customize:

The theme for this website is “WP Bootstrap Vision2BActive 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 does not use any widgets at this time.

Menus:

There is only one navigation menu created and it is for the top navigation, called “top menu.” 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.

Menu Structure

Drag each item into the order you prefer. Click the arrow on the right of the item to add or remove it.

Home

Page ▼

Your Wellness

Page ▼

Wellness Program *sub item*

Page ▼

Currently, this menu is set to add new top-level pages to it automatically.

Menu Settings

Auto add pages

☒ Automatically add new top-level pages to this menu

Theme locations

☒ Main Menu

☐ Footer Menu

Header:

This site is not using this section.

Background:

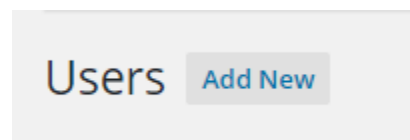
This site is not using this section.

12. 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.

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 (rather than adding an existing user within the network). 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.

Add New User

User has been added to your site.

Add Existing User

Enter the email address or username of an existing user on this network to invite them to this site. That person will be sent an email with a link to confirm their account.

Email or Username

Role

Subscriber ▼

Skip Confirmation Email

☐ Add the user without sending an email that requires their confirmation.

Other Roles

Select additional roles for this user

Add Existing User

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.

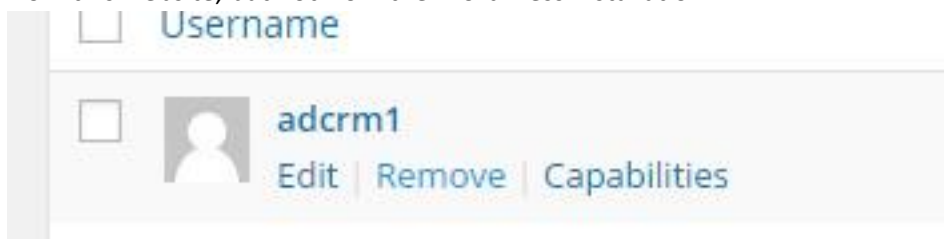
Once the person has been added, click the “Edit User” link. Within the Edit User window, add their first name and last name and choose to display their full name. Then click the “Update User” button.

First Name	<input type="text" value="Laura"/>
Last Name	<input type="text" value="McDonald"/>
Nickname <i>(required)</i>	<input type="text" value="m1221"/>
Display name publicly as	<input type="text" value="Laura McDonald"/>

Contact Info

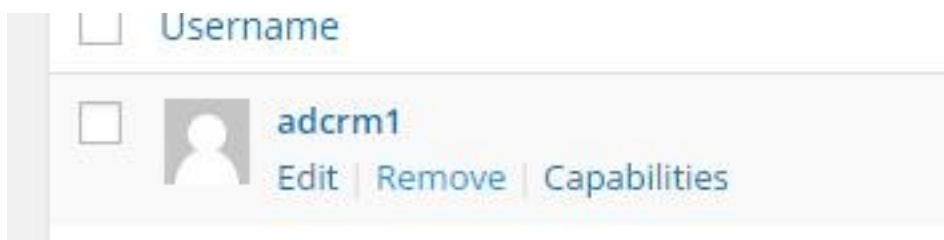
To Delete a User:

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.



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. All employees of your department are Subscribers to the overall site, but they have no access other than read-only until give a specific role on your site.



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.

13. Tools

This section can be ignored.

14. Settings

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