

WordPress User Guide for Editors

Contents

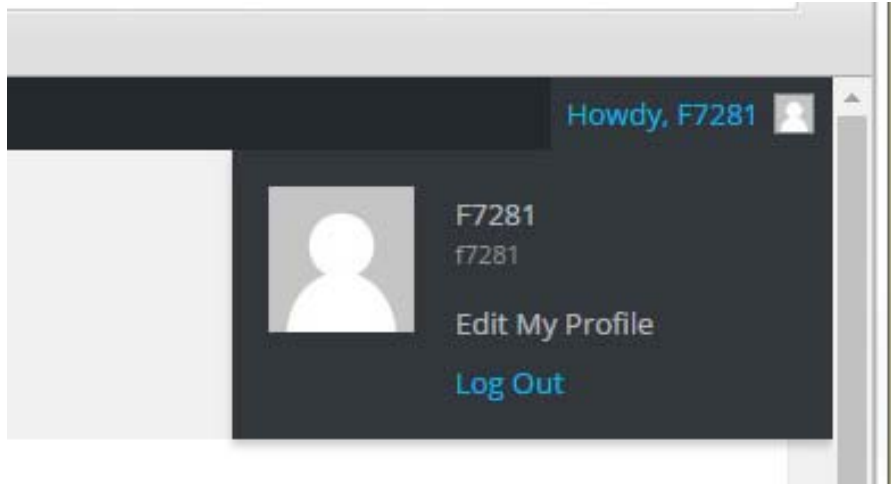
WordPress User Guide for Editors	1
1. Accessing the Site and Managing Your User Account	2
2. About WordPress	3
3. Your Sites and Dashboard	4
4. Sidebar Menu	4
5. Posts	5
6. Events	9
7. Media	12
Link Rules:	13
8. Divi Page Builder Plugin	13
9. Pages	15
Using the Workflow:	21
10. Comments	26
11. Projects	27
12. Workflows	27
13. Tools	27

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:

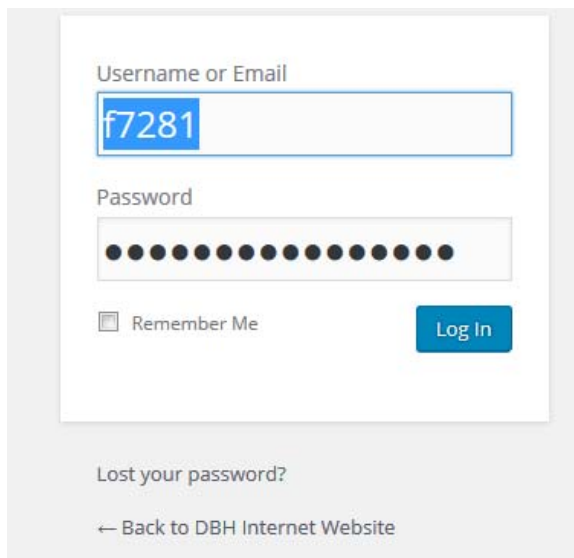


Password and View Your User Profile:

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 memorable password, but please make sure it is strong.

A screenshot of a login form. The form has two input fields: "Username or Email" and "Password". The "Username or Email" field contains the text "f7281". The "Password" field is filled with black dots. Below the fields, there is a checkbox labeled "Remember Me" and a blue "Log In" button. At the bottom of the form, there is a link "Lost your password?" and a link "← Back to DBH Internet Website".

Account Management

New Password

Strong

Enter your new password below.

New password

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](#)

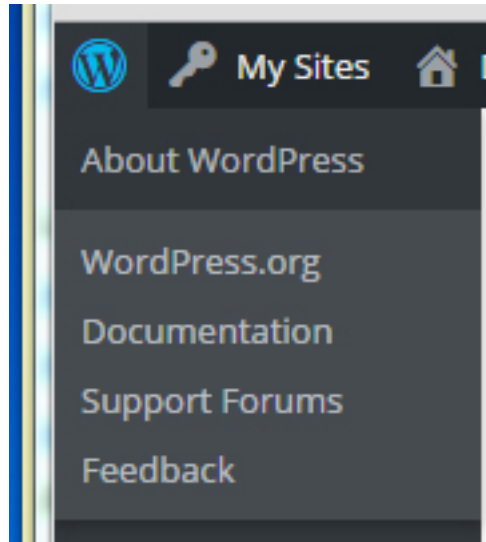
[Log in](#)

[← 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 editor for. At any time you can view a site by choosing the site name from the “My Sites” menu.

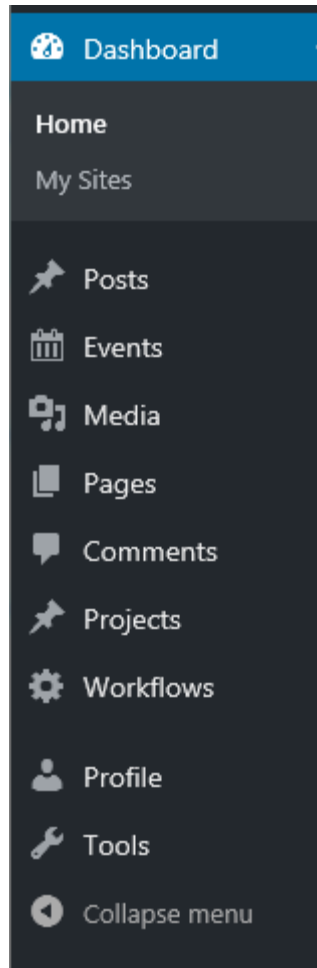
The current site you are viewing/editing will be listed next to the house icon at the top.



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.

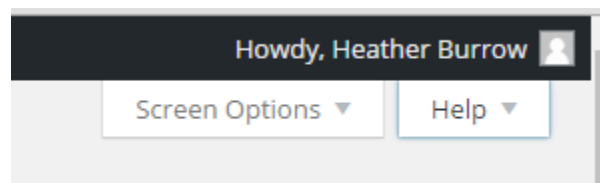


5. Posts

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.

Boxes

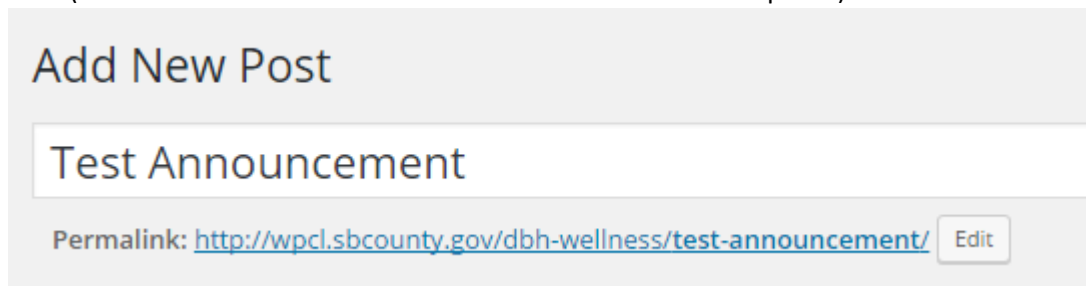
Categories Tags Featured Image The Divi Builder Excerpt Send Trackbacks Custom Fields Discussion Comments Slug Author

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:

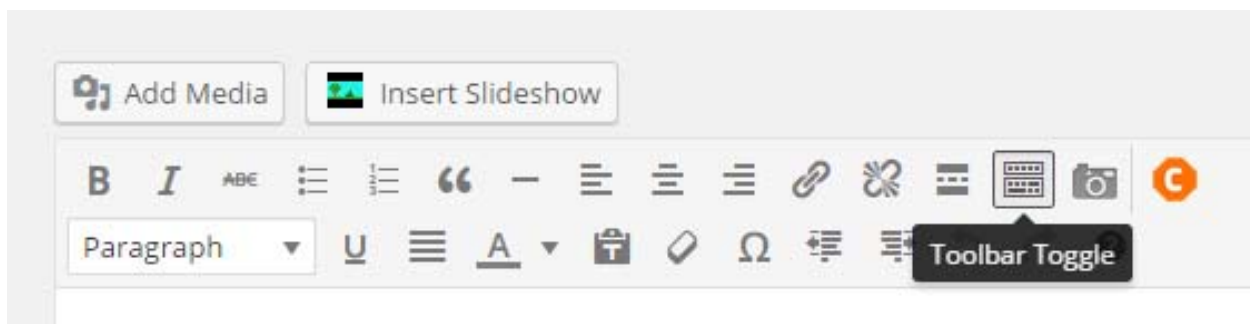
To add a new one:

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.



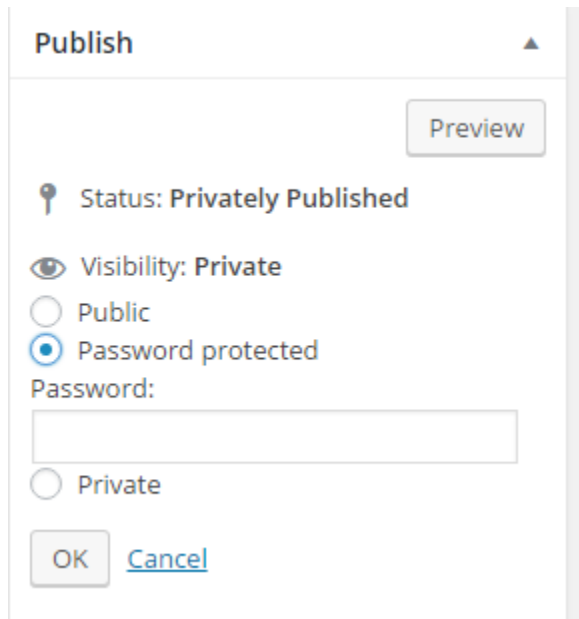
Since you are only adding basic content for these items you don’t need to use the Divi Builder.

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.

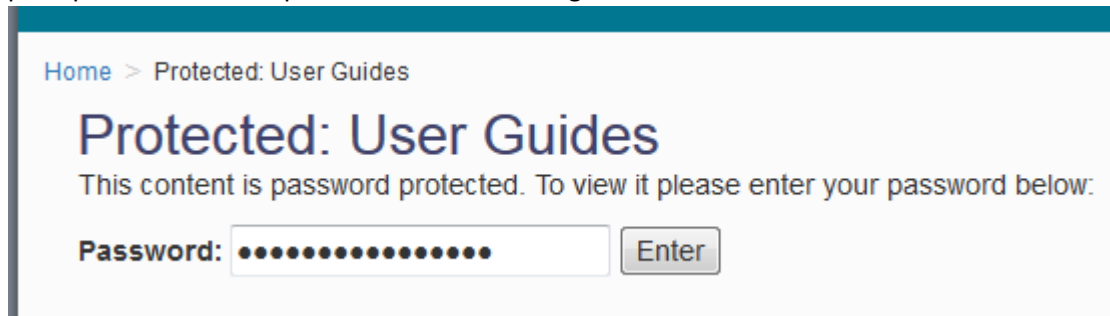
NOTE: You can also make a post or page private (only seen by those logged in to the system) or password protected by adding a password.



The screenshot shows a 'Publish' dialog box with the following elements:

- Publish** (header)
- Preview** (button)
- Status: Privately Published** (with a key icon)
- Visibility: Private** (with an eye icon)
- Public
- Password protected
- Password: [text input field]
- Private
- OK** (button) and [Cancel](#) (link)

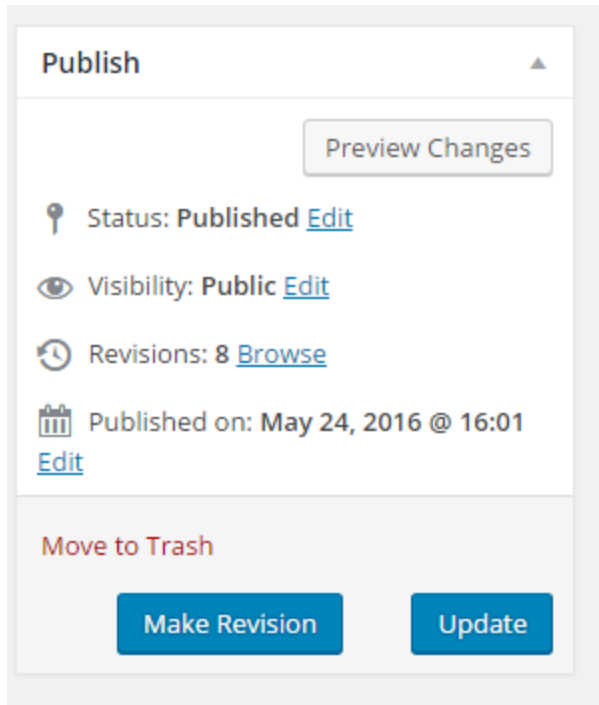
If you use the password protected functionality, anyone visiting the URL of the page will be prompted to enter the password before viewing it.



The screenshot shows a page with the following elements:

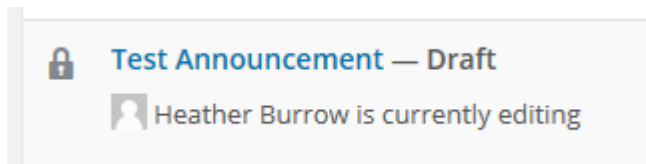
- Home > Protected: User Guides (breadcrumb)
- Protected: User Guides** (title)
- This content is password protected. To view it please enter your password below: (text)
- Password: [password input field with 15 dots]
- Enter** (button)

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.



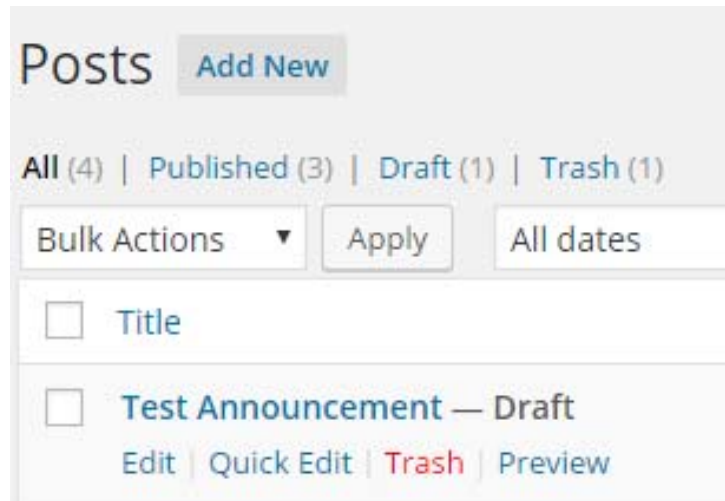
Using the Workflow:

Contributors only have adding and editing capabilities so they see a "Submit to Workflow" button only. As an editor 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.

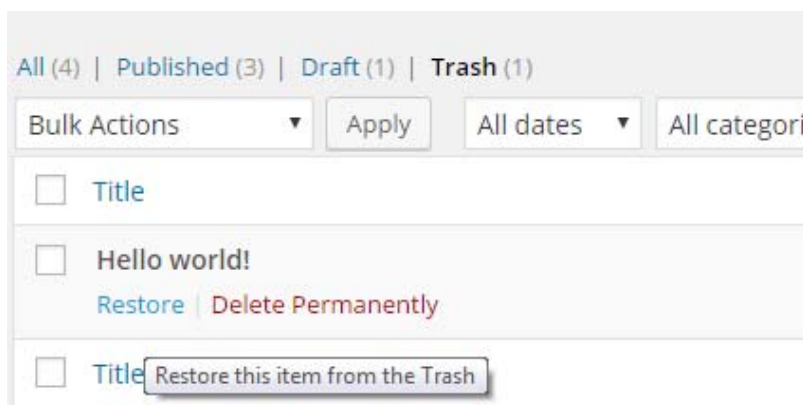
Delete a Post:

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: and will end events

Frequency Every Month(s) on the:

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)

Exclusions:

Recurrence Description:

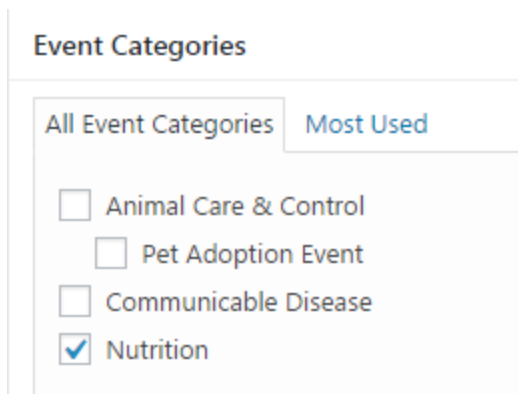
Use this field if you want to override the auto-generated descriptions of event recurrence

#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.



#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.

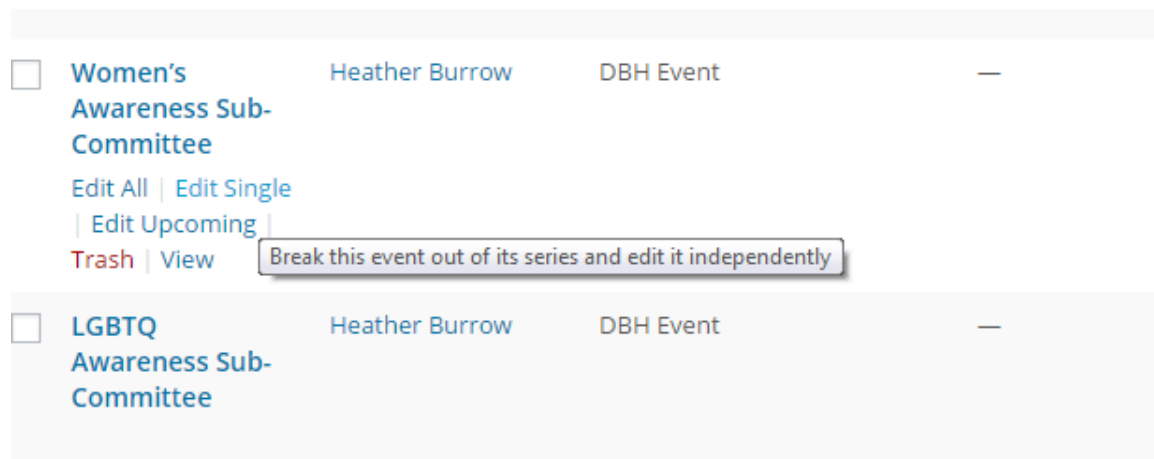
#8 Click the “Publish” button if new and you want to directly publish or “Update” if editing one already published. Alternatively, use the workflow option for review.

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



Same as Posts:

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

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

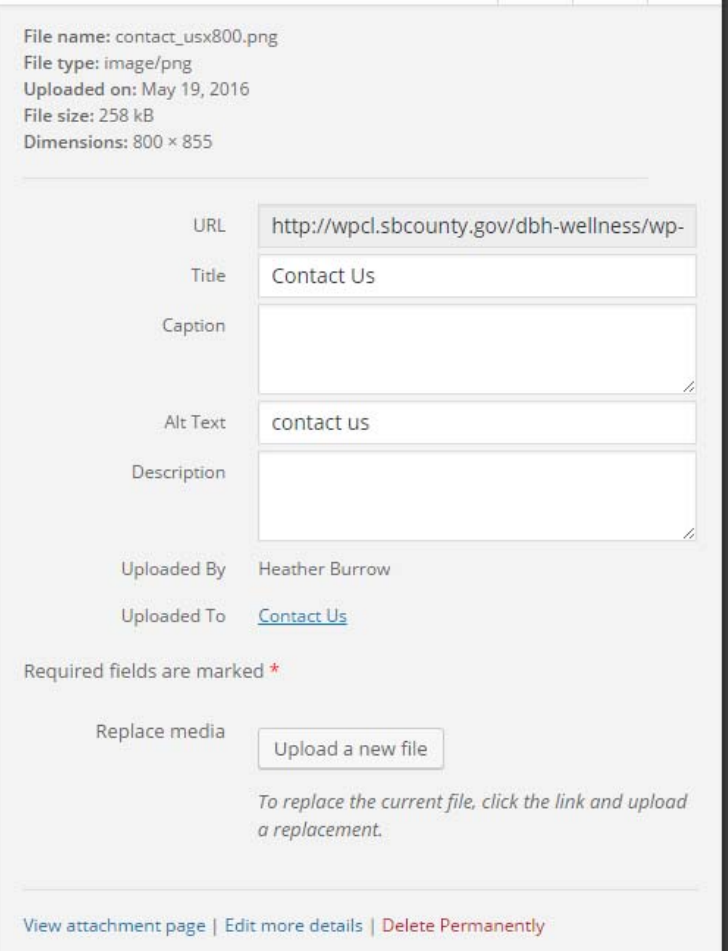
Once you have clicked on the “Media” link from the side menu, you will see the library of all your uploads (images and documents). Within the library, you can filter or search for a specific upload. Or add a new one by clicking on the “Add New” button. The maximum upload size is 12MB.

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	<input type="text" value="http://wpcl.sbcounty.gov/dbh-wellness/wp-"/>
Title	<input type="text" value="Contact Us"/>
Caption	<input type="text"/>
Alt Text	<input type="text" value="contact us"/>
Description	<input type="text"/>
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 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.

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.

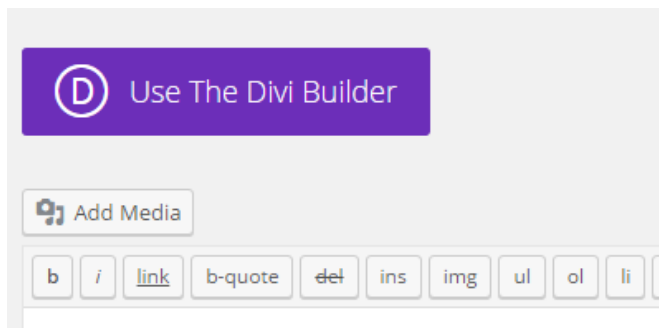
If the link is a webpage *outside* your site, it should open in the same window.

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.

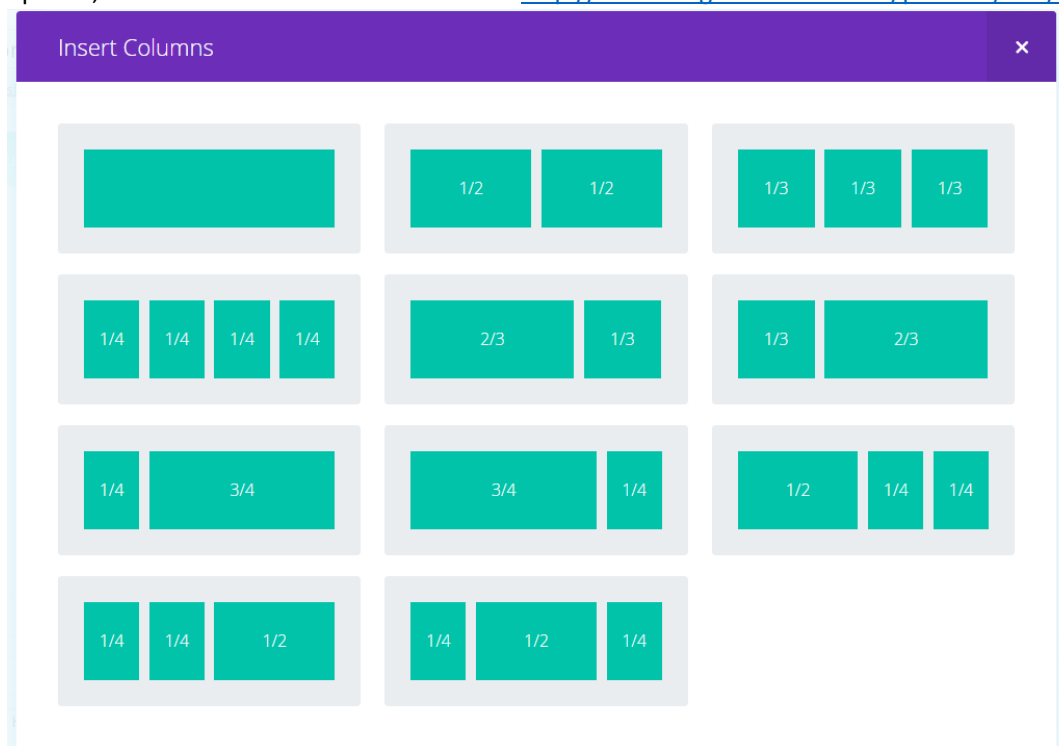


When clicked it swaps out the default content editor with a more advanced content editor that comes with pre-built in layouts and modules. If you choose to use the Divi Builder for a page that is already created, it will take the current content and insert it into a text module in a default layout that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

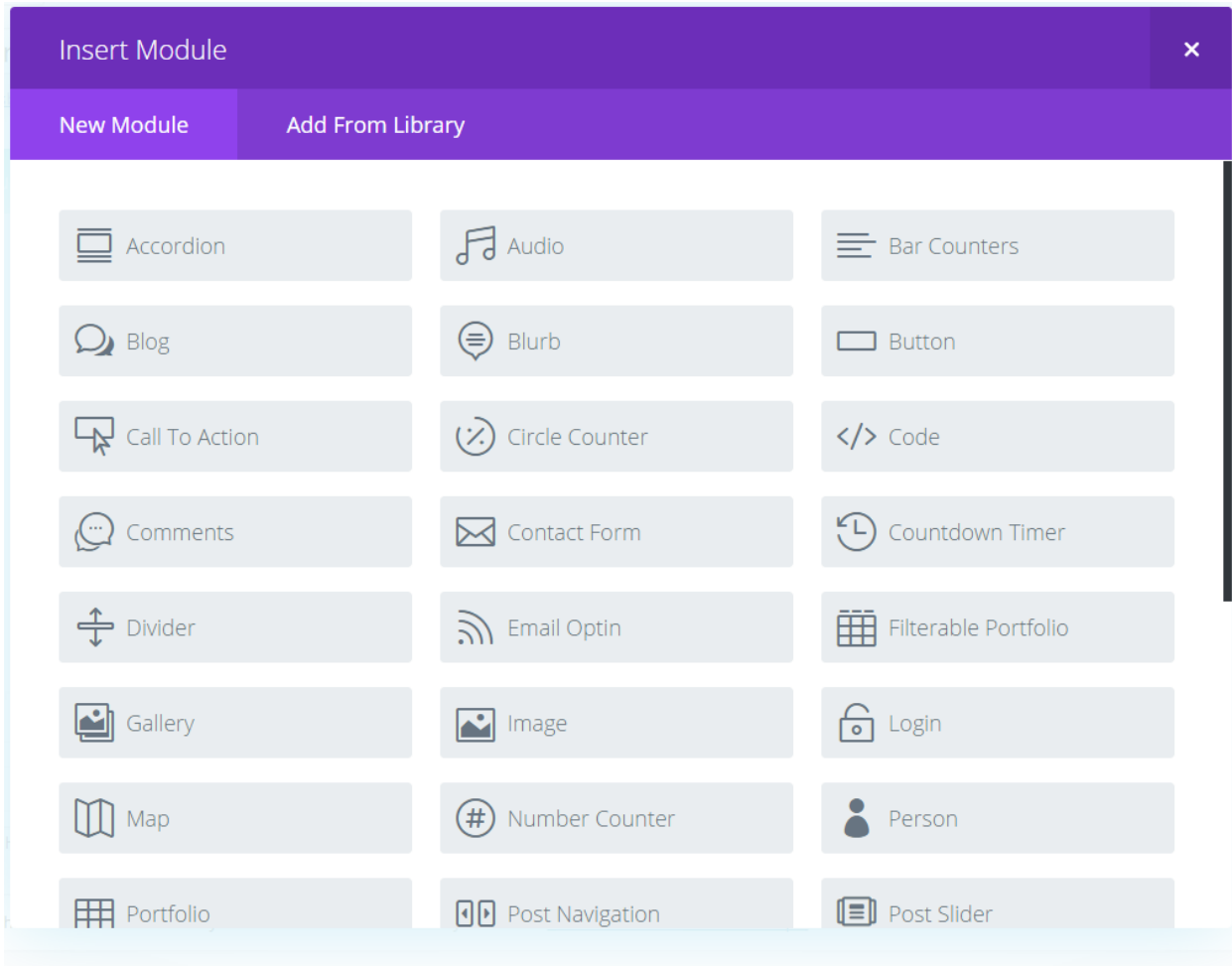
With the Divi Builder you can add out-of-the-box modules with extra functionality, clone content, lock content, hide content, add custom CSS, undo actions---all using the editor window's interface.

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/> .

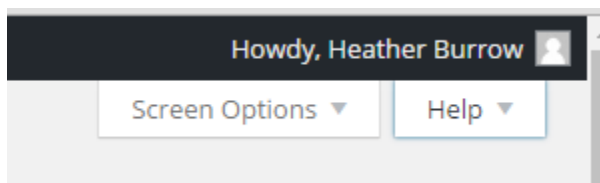


9. Pages

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, Author, Page Attributes so that these sections are visible. Once done, click the “Screen Options” link again to unreveal the window.

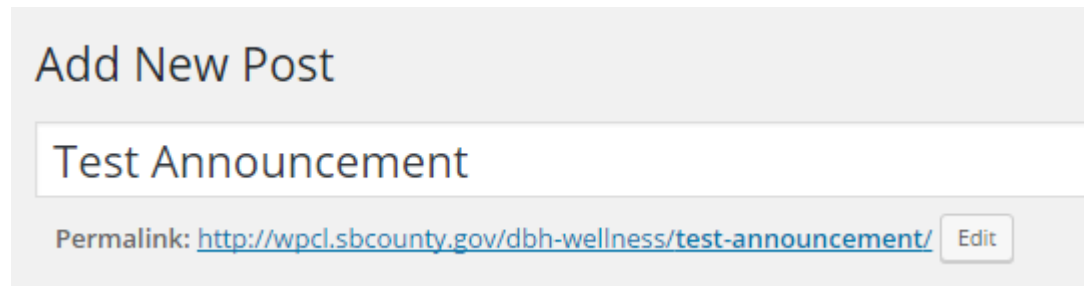


This action makes only these sections viewable on the edit screen for this module. Since these are the only features you will need access to, these are the only ones that need to be visible.

Add a New Page:

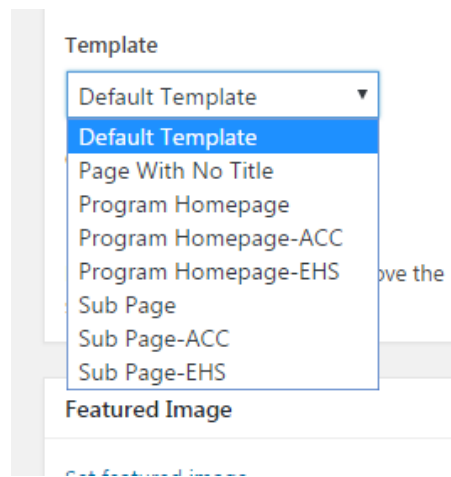
There are a number of ways to add a new page, using the top menu's "New" option, the "Add New" button on the page dashboard, or the "Add New" link on the side menu.

#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.)



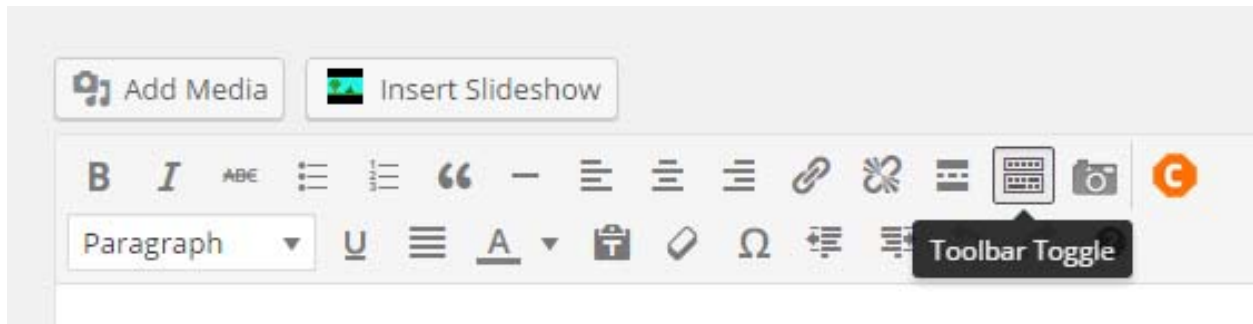
#1a- Under Page Attributes, choose what page is the parent of this new one if you are nesting.

#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.)

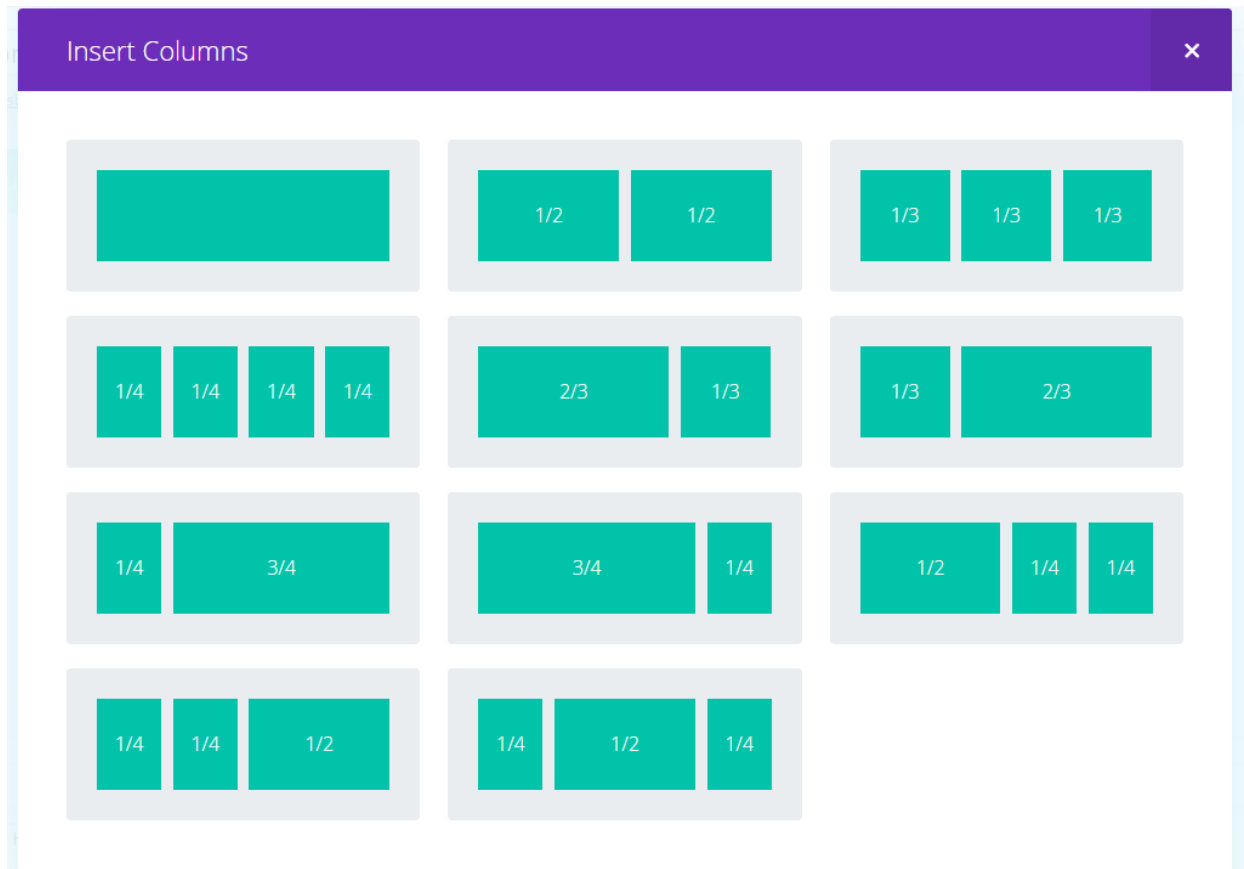


#2 Add the Content: Now add the content to the content editor area. If you choose to use the default WordPress editor, you can either view this editor in "Visual" mode or "Text" mode. Visual mode shows the content parsed and how it will be on the webpage, minus any layout. Text mode shows the content 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.

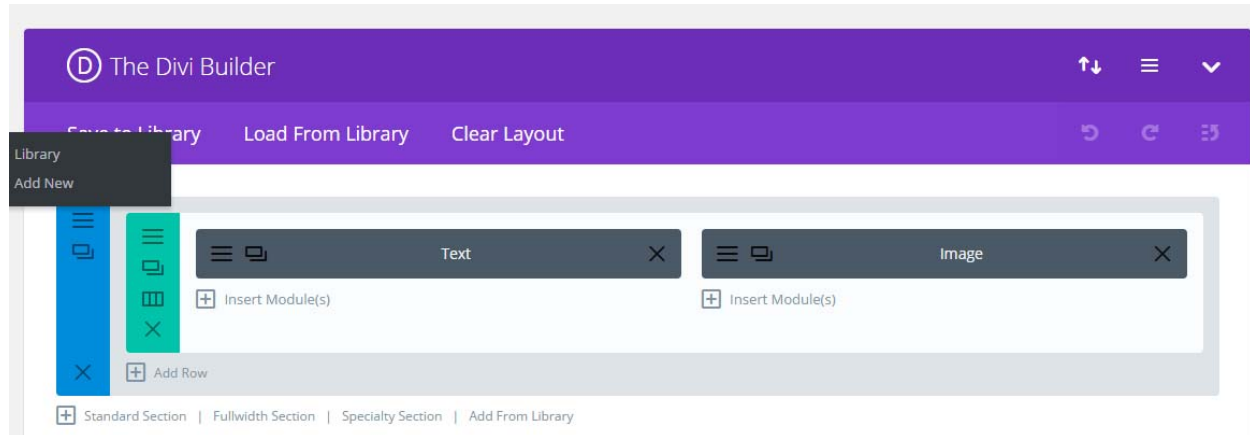


I recommend using the Divi Builder for all pages. If you choose to use the Divi Builder, you will be prompted to choose a layout.



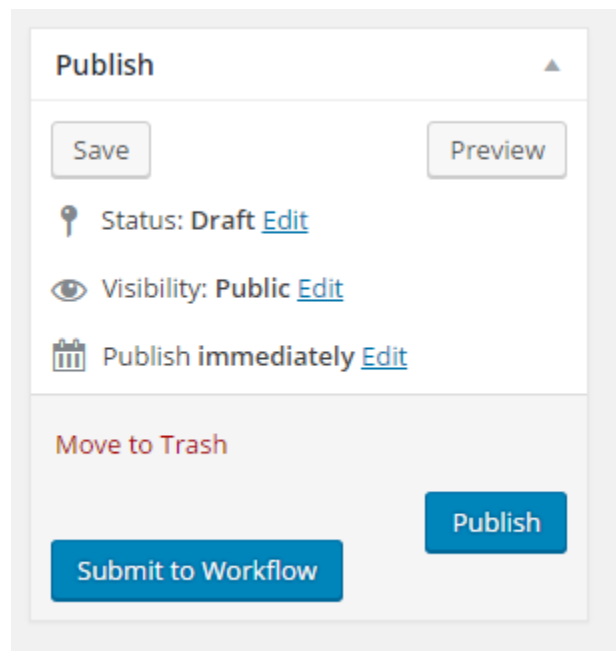
Once you have a layout chosen, choose to add a Text module by clicking the “Add Module” button within the layout section where you want to add the text. Then type in the text and save and exit the module. ****If you are copy text from a Word doc, it is best to first paste it into Notepad to strip out 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.**



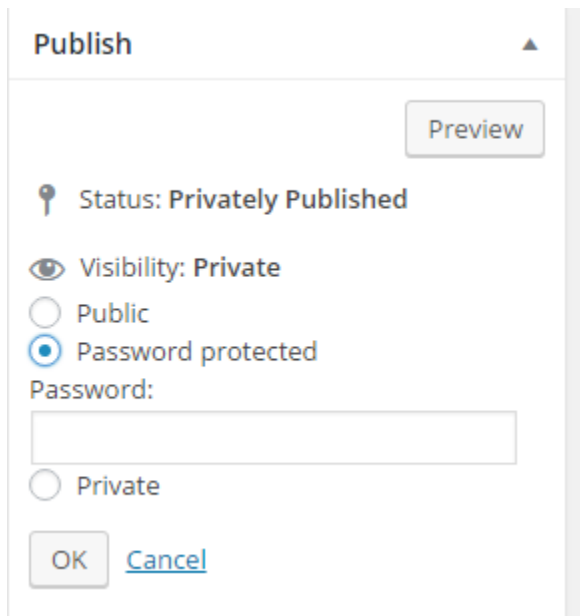
To preview your page you can at any time click the “Preview” button on the right under the Publish heading. This will show you the full page.

As an editor, 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.



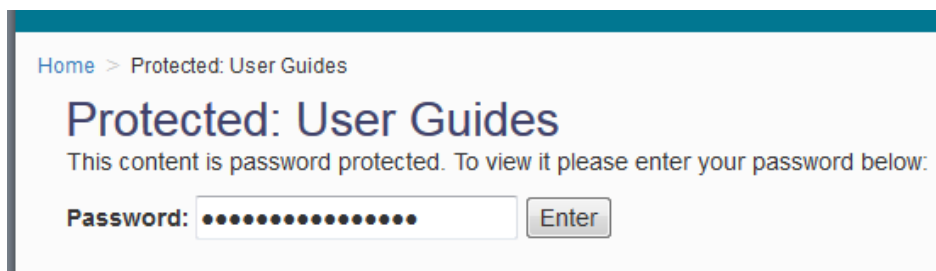
You also have the option of publishing the page at a later time by clicking the “Edit” link next to the “Publish immediately” text.

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



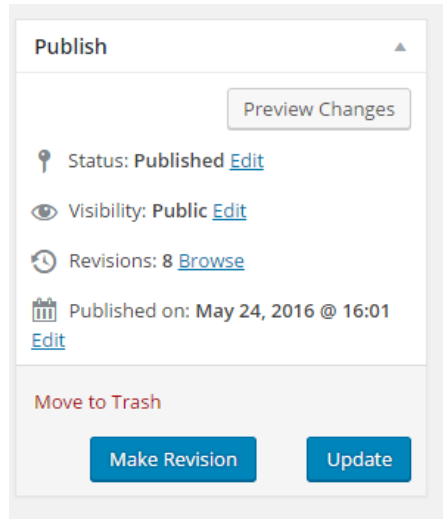
The image shows a 'Publish' dialog box with a 'Preview' button at the top right. Below the button, there is a key icon followed by the text 'Status: Privately Published'. Underneath, there is an eye icon followed by 'Visibility: Private'. There are three radio button options: 'Public', 'Password protected' (which is selected), and 'Private'. Below the 'Password protected' option is a text input field labeled 'Password:'. At the bottom left, there are 'OK' and 'Cancel' buttons.

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



The image shows a page titled 'Protected: User Guides'. The breadcrumb trail is 'Home > Protected: User Guides'. The main heading is 'Protected: User Guides'. Below the heading, it says 'This content is password protected. To view it please enter your password below:'. There is a text input field labeled 'Password:' containing ten dots, and an 'Enter' button next to 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.

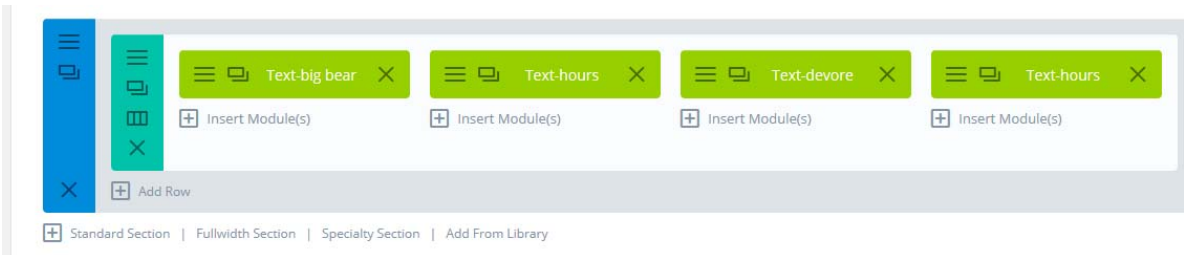


Edit a Page:

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.

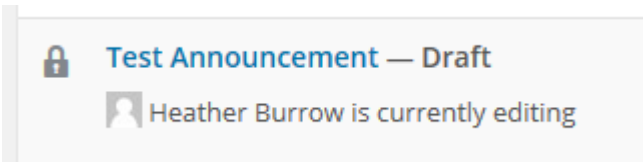
Edit Content in Global Module:

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.

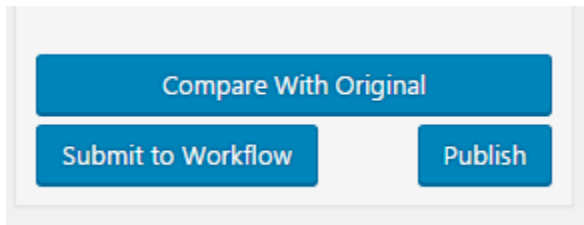


Using the Workflow:

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

Submit to Workflow:

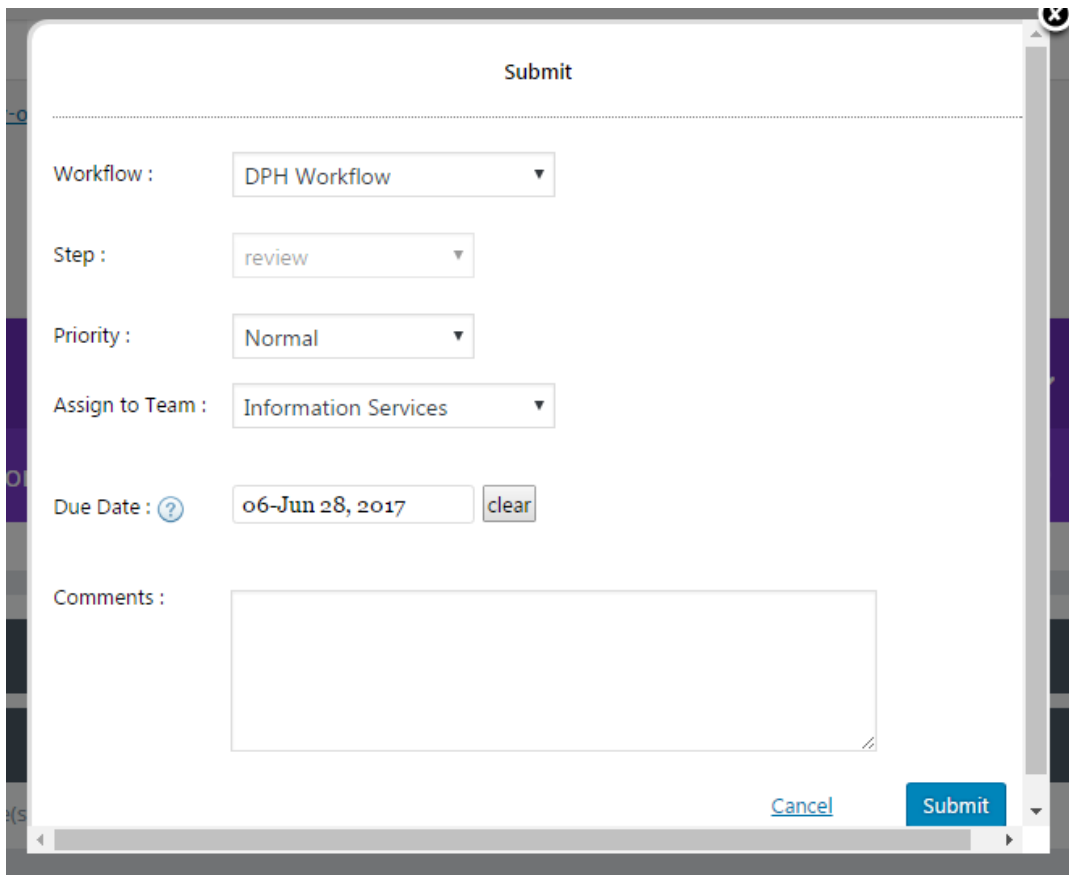
To use the workflow, choose the “Submit to Workflow” button and then you will see a “Submit” pop up window.



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

#2 Choose the priority level—the default is “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.

A screenshot of a "Submit" pop-up window. The window has a title bar with "Submit" in the center. Below the title bar is a horizontal dotted line. The form contains the following fields:

- Workflow : DPH Workflow (dropdown menu)
- Step : review (dropdown menu)
- Priority : Normal (dropdown menu)
- Assign to Team : Information Services (dropdown menu)
- Due Date : 06-Jun 28, 2017 (text input) with a "clear" button to its right.
- Comments : (empty text area)

At the bottom right of the form are two buttons: "Cancel" (text) and "Submit" (blue).

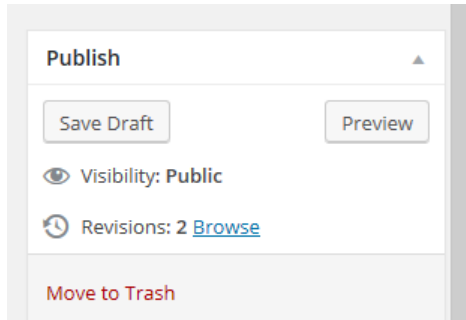
#4 Choose a due date—the default is tomorrow

#5 Add any comments for the reviewer

#6 Click “Submit”

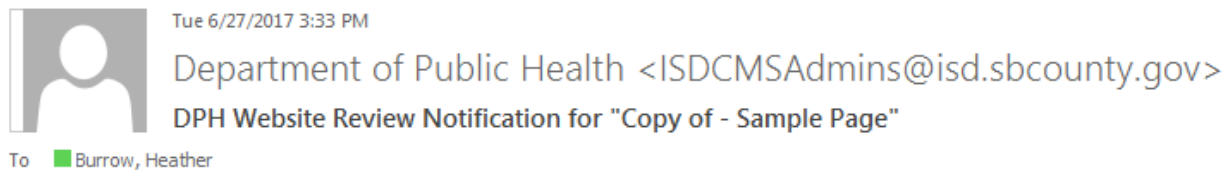
This activates the approval process and from here the selected team’s approvers will take over because they have received an email notification.

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:



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.

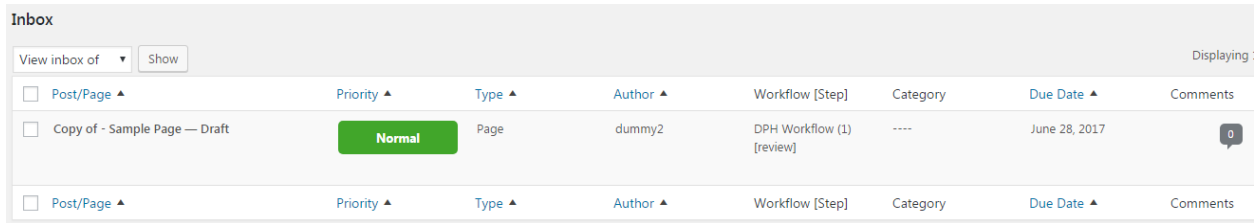
Priority : Normal

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



The screenshot shows an 'Inbox' interface with a table of items. The table has columns for 'Post/Page', 'Priority', 'Type', 'Author', 'Workflow [Step]', 'Category', 'Due Date', and 'Comments'. One item is visible: 'Copy of - Sample Page — Draft' with a 'Normal' priority, 'Page' type, 'dummy2' author, 'DPH Workflow (1) [review]' workflow, and a due date of 'June 28, 2017'. A '0' comment icon is shown in the 'Comments' column.

Post/Page	Priority	Type	Author	Workflow [Step]	Category	Due Date	Comments
<input type="checkbox"/> Copy of - Sample Page — Draft	Normal	Page	dummy2	DPH Workflow (1) [review]	----	June 28, 2017	0

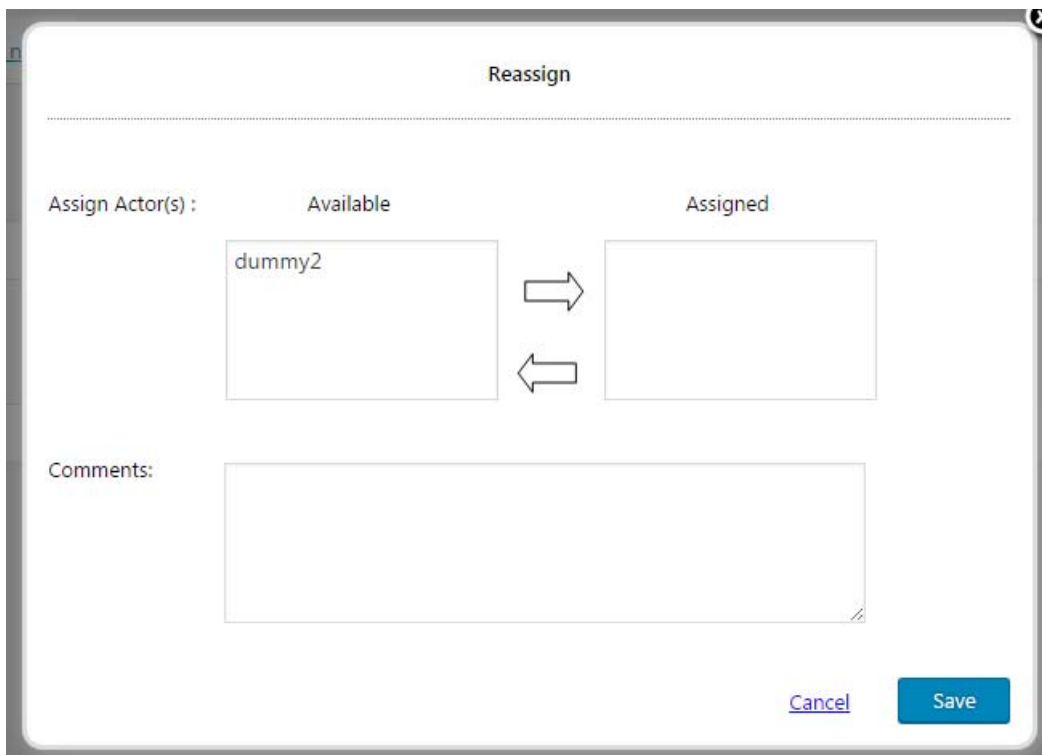
From here you can also read the comments associated with the submittal by clicking on the comments icon. **To see all current assignments and current statuses, click the “Reports” submenu item on the sidebar.

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



The screenshot shows a submenu for the item 'Copy of - Relias Wellness Courses Now Available — Draft'. The submenu items are: Edit, View, Compare, Approve, Reassign, Abort Workflow, and View History.

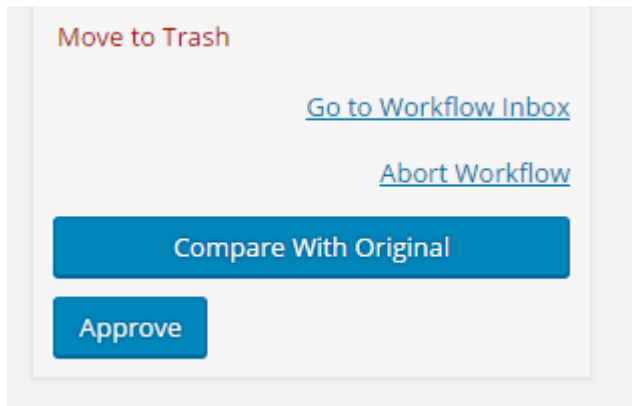
#4 If needed, choose at any time to “Reassign” this assignment to another editor within your team and choose from the list of approvers within your team and optionally add a comment. Those selected will get a notification email. (Only those assigned to the item can reassign it and you can only choose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



The screenshot shows a 'Reassign' dialog box. It has a title bar with a close button. Below the title, there are two columns: 'Available' and 'Assigned'. Under 'Available', there is a text box containing 'dummy2'. Under 'Assigned', there is an empty text box. Between the two text boxes are two arrows: a right-pointing arrow and a left-pointing arrow. Below these columns is a 'Comments:' label and a large text area. At the bottom right, there are 'Cancel' and 'Save' buttons.

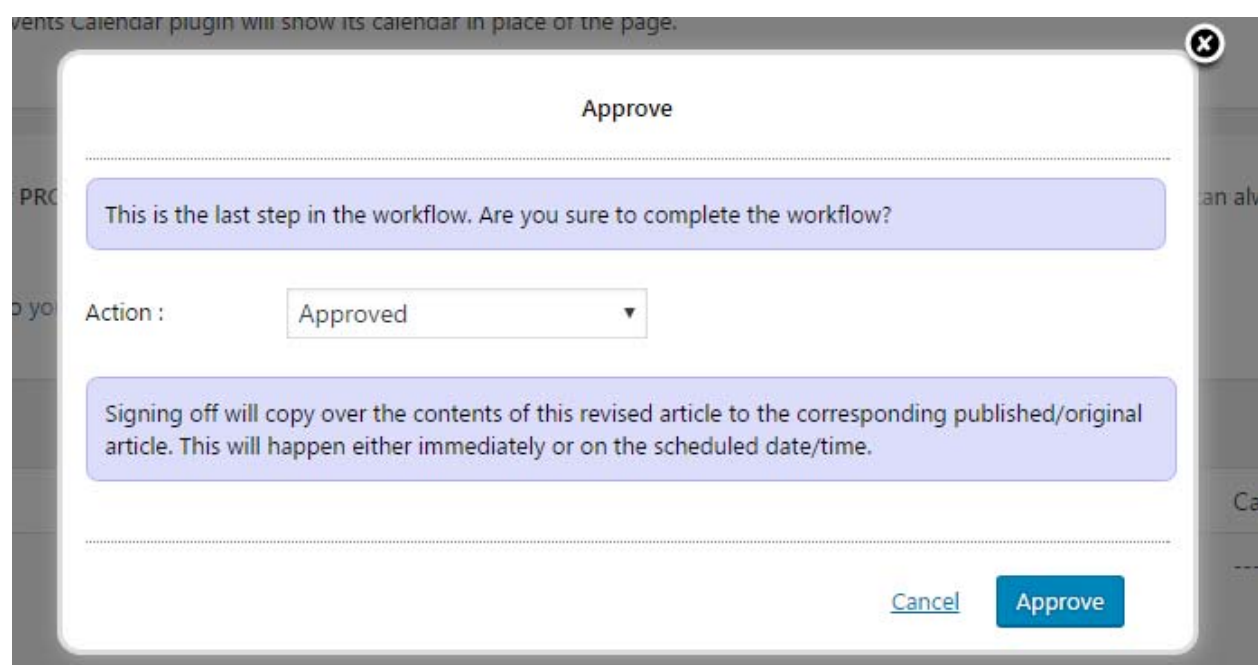
#5 Choose to “View” the page to see the changes by the contributor. Once done, close the extra window.

#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.



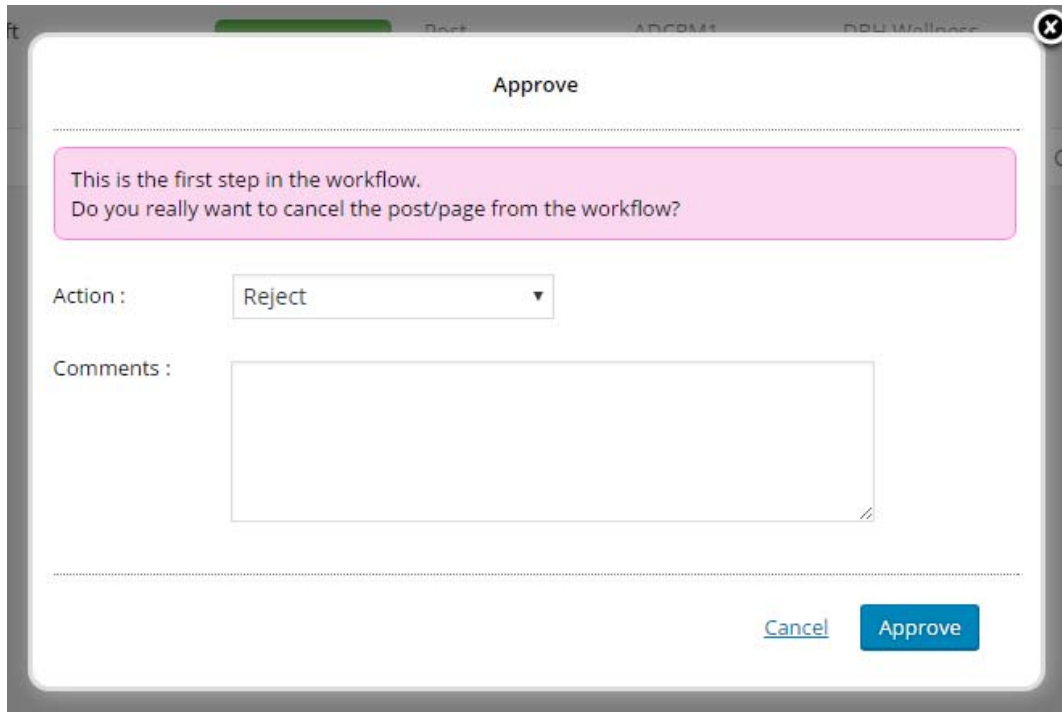
#7 If no additional edits are needed, then click the “Approve” link under the page within the Inbox or within the page editor window.

#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.



The screenshot shows a modal dialog box titled "Approve". At the top, there is a pink message box containing the text: "This is the first step in the workflow. Do you really want to cancel the post/page from the workflow?". Below the message box, there is a label "Action:" followed by a dropdown menu currently showing "Reject". Underneath that is a label "Comments:" followed by a large, empty text input area. At the bottom right of the dialog, there are two buttons: a blue "Approve" button and a grey "Cancel" button.

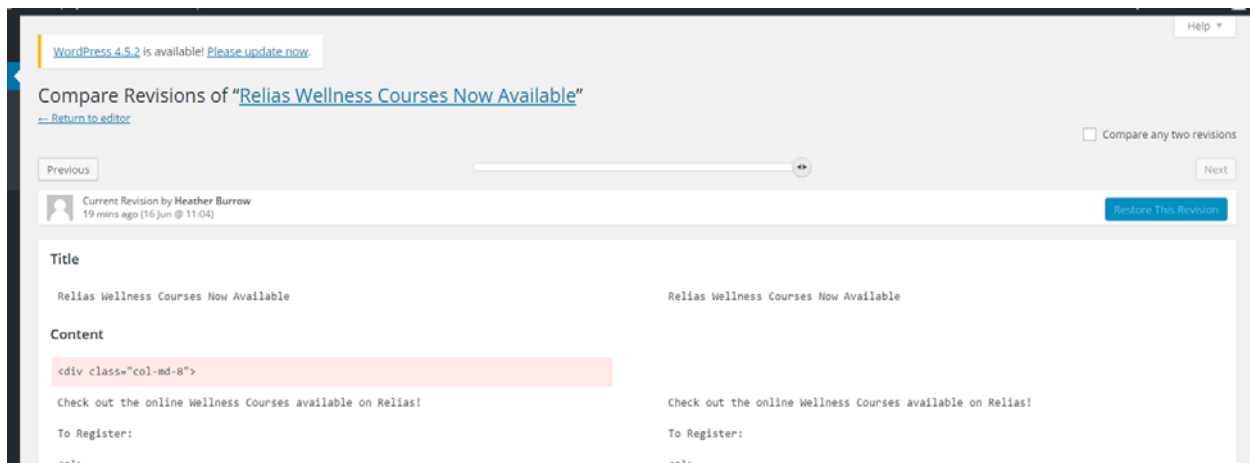
Abort a Workflow:

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.

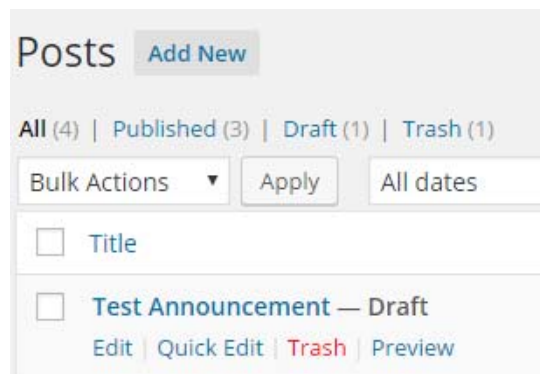
See the Revision History for a Page:

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.



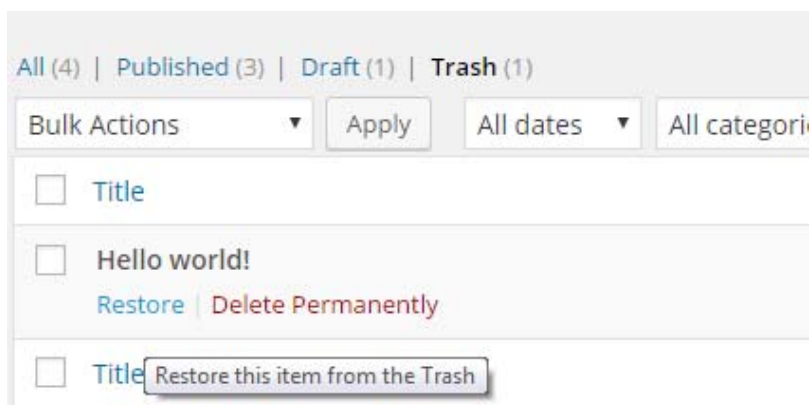
Delete a Page:

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

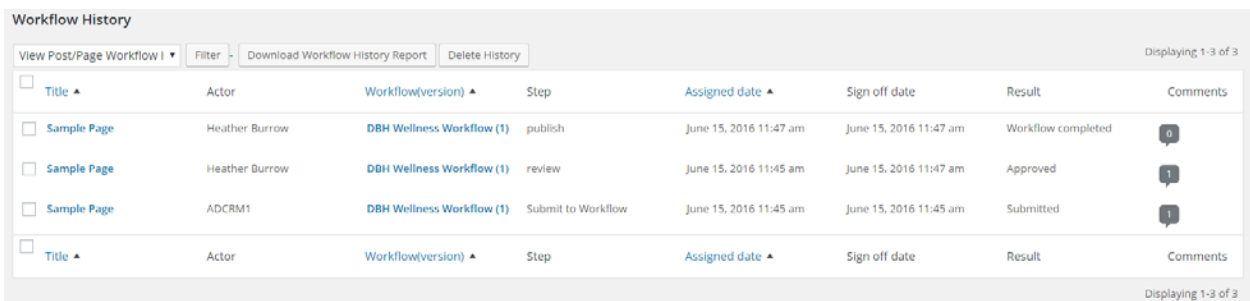
12. Workflows

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.



Workflow History

View Post/Page Workflow | Filter | Download Workflow History Report | Delete History | Displaying 1-3 of 3

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

Displaying 1-3 of 3

View Current Statuses:

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



Current Assignments | Workflow Submissions

All Types | Filter | Not in Workflow (2) | In Workflow (0) | Displaying 1-2 of 2

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

Use a Workflow:

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

13. Tools

This section can be ignored.