



Centralized WordPress Hosting Editor's Guide

All Templates Version

Overview

This guide is designed to familiarize you with WordPress, as implemented by EITS as part of Centralized WordPress Hosting. This guide assumes you have at least Editor level access to your WordPress site and your site is using a template that was not designed by EITS or Kaptiv8 that is using the Classic Editor.

If you find that you are not seeing features outlined in this guide that you believe you should have access to, please partner with your local Administrator(s) to verify you have the correct level of access. The availability of these features can vary greatly from site to site based on your sites configuration and template options.

Accessing WordPress

There are two primary ways of accessing WordPress.

1. If you are not logged into WordPress, visit the URL for the website and add /wp-admin/ to the end of the address.
 1. If your site is in development, the development URL for your site will look something like <https://gacrc.wpenginepowered.com/>. This development URL will be communicated to your team by EITS during the setup process. Once the site is launched, the URL will look something like <https://gacrc.uga.edu/>.
 2. If you are unable to locate the login by adding /wp-admin/ to the URL that means the default path to access the login has been changed. Work with your local Administrator(s) to ascertain the correct path.
2. Login with your unique MyID or WordPress account login depending on how your site is setup.
 1. If you are unable to login, partner with your local Administrator(s) to verify that you have access.

OR

1. If you are already logged into WordPress, visit the URL for your website.
2. Click on the name of your website in the toolbar in the top left corner of the page and then on Dashboard.

The WordPress Interface

Once you are logged into WordPress, the following options will appear on the left hand toolbar. Additional options may appear based on your sites template and configuration.

- **Dashboard**
 - The Dashboard provides an overview of important information and recent activity on your website.
- **Posts**
 - Create, edit, manage, or delete Posts. See below for an overview of Pages Vs. Posts.
- **Media**
 - Upload, edit, download, or delete files in your Media Library.
- **Pages**
 - Create, edit, manage, or delete Pages. See below for an overview of Pages Vs. Posts.
- **Comments (optional)**
 - This feature allows you to manage and edit comments made on your website. Comments are likely to be disabled on most sites. This option may not appear. This guide does not contain information on working with Comments. Please partner with EITS for guidance if your site is using Comments and you would like assistance.
- **Profile**
 - This option allows you to customize specific features related to your user account, such as the WordPress color scheme, your display name, and bio information.
- **Tools**
 - This option contains advanced features for importing or exporting data, or gauging the health of your site.

These additional options will also appear along the top of the page.

- **WordPress Logo**
 - Clicking on the WordPress logo will open a dropdown menu with options to learn more about WordPress. Please note however that these support options only provide generic information on how WordPress works. Information about working with our EITS specific WordPress implementation may be found in the EITS knowledge base.
- **Site Name**
 - Click on the site name will give you an option to visit the public side of your website.
- **Comments (optional)**
 - Any pending comments will appear next to the speech bubble. Click to moderate or reply to any comments. Comments may be disabled on certain sites and this option would not appear.
- **New**
 - This option will allow you to directly create a new Page or Post, or upload new Media. See below for more details on these options.
- **Howdy, (Your Name Here)**
 - This option will allow you to edit your profile or log out if you are finished making changes to the site. A Profile is displayed by clicking on an author name that is displayed on a Post or Comment. Depending on the configuration of your template, author names may not be displayed on your site, thus the profile information will not be displayed publicly to any users of your site.
- **Search**
 - Clicking on the spyglass icon will allow you to search the website for content.

Screen Options and Help

In the top right corner of the WordPress editing interface, you will find tabs labelled Screen Options and Help.

Screen Options give you the ability add, remove, or toggle elements on the page. For instance, switching to Extended View under Pages will add further details to the page listings below.

Help will provide you with a brief explanation of the page in question and an explanation of some of the features available. You may also find additional links to relevant WordPress documentation to the right of this area.

Pages Vs. Posts

Pages and **Posts** represent two ways of creating content in WordPress and they both operate very differently. Pay close attention to these differences to decide which option is best for the content you are trying to create.

- **Posts** are typically used for blog entries and articles, while **Pages** are typically used for more static content such as informational pages about your department or programs.
- **Posts** may have comments beneath them, while **Pages** do not.
- **Posts** are organized using categories and tags, while **Pages** are hierarchical and organized as child and parent pages.
- **Posts** are timely, while **Pages** are timeless.
- **Pages** are typically included in your site's navigation menu, while **Posts** are not.

Creating a Page

Additional options may appear as part of your template configuration and site design. Please consult your Administrator for assistance verifying the function of these additional options.

1. From the menu on the left, select **Pages > Add New**.
2. Enter a **Title** for your page at the top.
 1. If you would like the URL to be different than the Title, edit the **Permalink** to this page directly below the Title area.
 2. *Note: Updating the Title of a page does not change it's Permalink. If you have changed the title and would like the Permalink to reflect that change, you must update it manually.*
3. Add your page contents.
 1. Select **Add Media** to add media content to the page.
 1. In the window that opens, you may elect to **Upload Files** or select an existing image from the **Media Library**.
 1. To upload a file, click on Select Files and navigate to the file on your computer.
 2. The file will be stored in your Media Library. Select the file and enter any Alt Text, Title, Caption, and Description using the options on the right side of the page as required by the type of media you've uploaded.
 2. Select **Create Gallery** if you would like to insert thumbnails for multiple images.
 1. Select the images you would like to include and adjust the Alt Text, Title, Caption, or Description as necessary and click on Create a New Gallery.
 2. **Create Audio Playlist** and **Create Video Playlist** can be used in a similar manner.
 3. Select **Featured Image** if you would like to have a prominent image for the page.
 1. You may elect to **Upload Files** or select an existing image from the **Media Library**.

2. To upload an image, click on Select Files and navigate to the image on your computer.
3. The image will be stored in your Media Library. Select the image and enter the Alt Text, Title, Caption, and Description using the options on the right side of the page.
4. Select **Insert from URL** if you would like to link to a piece of media on another website.
 1. Paste the link to the media file and update the Link Text before clicking on Insert Into Page.
2. Select from the **Styles** dropdown menu to change text formatting for any areas of the page.
3. Use the **Insert/Edit Link** option to create or edit links.
 1. Enter your URL, type to search from a list of pages on your site, or click on the gear icon for link options.
 1. From this menu you can directly alter the link text or choose to have the link open in a new tab.
4. Use the **Insert Read More Tag** option to create a break in the page.
 1. This will insert a Read More link in the page. The user will need to click on this link to continuing reading the content.
5. Select **Toolbar Toggle** to add additional functions to the toolbar.
 1. In addition to additional formatting options, you will also be given access to Paste as Text, Clear Formatting, Special Characters, and Undo or Redo options.
 2. Click on the Question Mark icon for a list of keyboard shortcuts available in WordPress.
4. Click on the **Screen Options** tab in the top right corner of the page for access to additional options.
 1. **Revisions** - Review any previous version of the page using Revisions.
 1. Click on the **date/time stamp** for a revision to view it.
 2. Use the **arrow slider** or click on **Previous/Next** to change the revision you are viewing.
 1. Click on **Compare Any Two Revisions** then use the arrow slider to compare two different versions of the page.
 3. Click on **Restore this Revision/Autosave** to revert to the desired prior version.
 4. Click on **Go to Editor** to return to the Post.
 2. **Custom Fields** - If your template supports Custom Fields, select the Name and Value, or select Enter New to create a new custom field type. Click on Add Custom Field when you are finished.
 3. **Discussion** - If your template has comments enabled, you can choose to **Allow Comments** on this post. Optionally, you can choose to **Allow Trackbacks and Pingbacks**. More information on this feature can be found at <https://wordpress.org/documentation/article/trackbacks-and-pingbacks/#how-do-i-send-a-trackback-classic-editor-only>.
 4. **Comments** - If your template has comments enabled, this option will allow you to add a comment to a post.
 5. **Slug** - Editing your page slug will impact the Permalink to your Post. You can also edit the Slug by editing your Permalink.
 6. **Author** - This option allows you to change the Author associated with the Post. The Author of a Page or Post may be displayed on your website if this feature is enabled in your template. You will also see the Author name next to Pages or Posts in the WordPress editing interface.
 7. Adjust any **Page Attributes**, as necessary.

1. **Parent** - This option allows you to select a parent page for the page you are creating. This is an integral part of site organization and informs the items in navigation menus throughout the site.
2. *Note: Only published pages may be set as a Parent page.*
3. **Template** - This option allows you to change the page layout in use. The options in this dropdown menu may vary based on what site template you are using.
4. **Order** - This option allows you to set the order of pages under the Parent page. This value influences the order of items in navigation menus throughout the site. By default this value will be set to 0.
 1. Example scenarios:
 1. If you have three pages and they are all set to 0, WordPress would order the items alphabetically under their Parent page.
 2. If you have two pages set to 0 and one page set to 1, the page with a value of 1 would appear as the third item, while the first two items would appear alphabetically.
8. Set a Featured Image by clicking on the **Set Feature Image** link in that section. The usage of Feature Images and their placement is specific to the template your site is using.
 1. In the window that opens, you may elect to **Upload Files** or select an existing image from the **Media Library**.
 1. To upload an image, click on **Select Files** and navigate to the image on your computer.
 2. The image will be stored in your Media Library. Select the image and enter the Alt Text, Title, Caption, and Description using the options on the right side of the page.
 2. Click the image to edit or change the image.
 3. Click **Remove Feature Image** if you would like to remove the image entirely.
5. When you are finished making changes to the post, select the appropriate option from the **Publish** menu on the right side of the page.
 1. **Status** - This option allows you to change the Status of a page between Draft, Pending Review, or Published.
 1. **Draft** saves a copy of the page but does not make it public.
 2. **Pending Review** saves a copy of the page to be approved by another user on the site.
 1. Once a Page has been marked as Pending, it should not be published until it has been reviewed. If the Page is published, it's status will change to Published and it will no longer appear as Pending.
 2. *Note: You cannot specify which user needs to approve the Page before publishing. Please see the Pending Pages and Posts section for more information on establishing an e-mail based workflow with an approver.*
 3. The **Published** status appears after a page has already been published. Setting a Page to Draft
 2. **Save Draft/Save as Pending** - This option saves an updated copy of the page changes to WordPress where only other editors of your site can see them. It does not update the contents of the page on your website.
 3. **Preview** - This option opens a new tab and displays a Preview of what your page will look like when Published.
 4. **Visibility** - Change the page in question to either be Public, Password Protected, or Private and click OK.
 1. If you change the page to **Password Protected** you must enter a password of your own choosing.

2. If you change the page to **Private**, only logged in users of your WordPress site will be able to view the page.
5. **Revisions** - As your pages are edited, previous versions of each page will be stored. A list of revisions will appear below the editor.
 1. Click on **Browse** to view saved Revisions.
 2. Click on **Restore this Revision** or **Restore This Autosave** to revert to the prior version of the page.
6. **Publish On** - This option allows you to schedule a date and time to publish your page.
 1. To use this option, click Edit, set the date and time, and click OK.
7. **Move to Trash** - This option will delete the page entirely.
8. **Publish** - This option will make your page appear on your live with any changes or updates.

Editing an Existing Page

1. From the menu on the left, select **Pages > All Pages**.
2. Click on the **Title** for the page.
3. When you are finished making changes to the Page, click on **Update** in the Publish section to make your changes public.

OR

1. If you are viewing the publicly accessible version of your site and are already logged into WordPress, visit the URL for the page you would like to edit.
2. Click on **Edit Page** in the toolbar at the top of the screen.
3. When you are finished making changes to the Page, click on **Update** in the Publish section to make your changes public.

Editing the Front Page

Each WordPress website has a designated homepage that is labelled Front Page in the editing interface. Any Page is eligible to be made the Front Page and an Administrator would be required to make the change. The Front Page includes options that are not available on other Pages. These options will vary by template and site design. Please consult your Administrator for assistance verifying the function of each of these options.

1. From the menu on the left, select **Pages > All Pages**.
2. Look for a Page that includes **— Front Page** in its Title. Click on the Title for the page.
3. When you are finished making changes to the Page, click on **Update** in the Publish section to make your changes public.

Creating a Post

Additional options may appear as part of your template configuration and site design. Please consult your Administrator for assistance verifying the function of these additional options.

1. From the menu on the left, select **Posts > Add New**.
2. Enter a **Title** for your post at the top.
 1. If you would like the URL to be different than the Title, edit the **Permalink** to this page directly below the Title area.

2. *Note: Updating the Title of a page does not change it's Permalink. If you have changed the title and would like the Permalink to reflect that change, you must update it manually.*
 3. Add your post contents.
 1. Select **Add Media** to add media content to the page.
 1. In the window that opens, you may elect to **Upload Files** or select an existing image from the **Media Library**.
 1. To upload a file, click on Select Files and navigate to the file on your computer.
 2. The file will be stored in your Media Library. Select the file and enter any Alt Text, Title, Caption, and Description using the options on the right side of the page as required by the type of media you've uploaded.
 2. Select **Create Gallery** if you would like to insert thumbnails for multiple images.
 1. Select the images you would like to include and adjust the Alt Text, Title, Caption, or Description as necessary and click on Create a New Gallery.
 2. **Create Audio Playlist** and **Create Video Playlist** can be used in a similar manner.
 3. Select **Featured Image** if you would like to have a prominent image for the page.
 1. You may elect to **Upload Files** or select an existing image from the **Media Library**.
 2. To upload an image, click on **Select Files** and navigate to the image on your computer.
 3. The image will be stored in your Media Library. Select the image and enter the Alt Text, Title, Caption, and Description using the options on the right side of the page.
 4. Select **Insert from URL** if you would like to link to a piece of media on another website.
 1. Paste the link to the media file and update the Link Text before clicking on **Insert Into Page**.
 2. Select from the **Styles** dropdown menu to change text formatting for any areas of the page.
 3. Use the **Insert/Edit Link** option to create or edit links.
 1. Enter your URL, type to search from a list of pages on your site, or click on the gear icon for link options.
 1. From this menu you can directly alter the link text or choose to have the link open in a new tab.
 4. Use the **Insert Read More Tag** option to create a break in the page.
 1. This will insert a Read More link in the page. The user will need to click on this link to continuing reading the content.
 5. Select **Toolbar Toggle** to add additional functions to the toolbar.
 1. In addition to additional formatting options, you will also be given access to Paste as Text, Clear Formatting, Special Characters, and Undo or Redo options.
 2. Click on the Question Mark icon for a list of keyboard shortcuts available in WordPress.
4. Click on the **Screen Options** tab in the top right corner of the page for access to additional options.
 1. **Revisions** - Review any previous version of the page using Revisions.
 1. Click on the **date/time stamp** for a revision to view it.
 2. Use the **arrow slider** or click on **Previous/Next** to change the revision you are viewing.
 1. Click on **Compare Any Two Revisions** then use the arrow slider to compare two different versions of the page.
 3. Click on **Restore this Revision/Autosave** to revert to the desired prior version.

4. Click on **Go to Editor** to return to the Post.
2. **Excerpt** - An excerpt will appear as a summary to the post in some WordPress templates. Verify that your template employs this feature before using.
3. **Send Trackbacks** - Trackbacks and pingbacks are methods for alerting blogs that you have linked to them. More information on these is available at <https://wordpress.org/documentation/article/trackbacks-and-pingbacks/#how-do-i-send-a-trackback-classic-editor-only>.
4. **Custom Fields** - If your template supports Custom Fields, select the Name and Value, or select Enter New to create a new custom field type. Click on Add Custom Field when you are finished.
5. **Discussion** - If your template has comments enabled, you can choose to **Allow Comments** on this post. Optionally, you can choose to **Allow Trackbacks and Pingbacks**. More information on this feature can be found at the link under Send Trackbacks.
6. **Comments** - If your template has comments enabled, this option will allow you to add a comment to a post.
7. **Slug** - Editing your page slug will impact the Permalink to your Post. You can also edit the Slug by editing your Permalink.
8. **Author** - This option allows you to change the Author associated with the Post. The Author of a Page or Post may be displayed on your website if this feature is enabled in your template. You will also see the Author name next to Pages or Posts in the WordPress editing interface.
9. **Categories** - Adjust any options under Categories, as necessary. Categories may be used to determine placement of a Post on your site.
 1. **Check the box** next to the relevant Category for the post or click **Add New Category** to create a new one.
 2. Select **Most Used** to see the most commonly used Categories.
10. **Tags** - Add any **Tags**, as necessary. Tags may be used to sort posts on your site.
 1. Enter tags separated by commas.
 2. Click on **Choose** from the most used tags to see a list of common tags.
11. **Featured Image** - Set a Feature Image by clicking on the Set Feature Image link in that section.
 1. In the window that opens, you may elect to **Upload Files** or select an existing image from the **Media Library**.
 2. To upload an image, click on **Select Files** and navigate to the image on your computer.
 3. The image will be stored in your Media Library. Select the image and enter the Alt Text, Title, Caption, and Description using the options on the right side of the page.
5. When you are finished making changes to the post, select the appropriate option from the **Publish** menu on the right side of the page.
 1. **Status** - This option allows you to change the Status of a page between Draft, Pending Review, or Published.
 1. **Draft** saves a copy of the page but does not make it public.
 2. **Pending Review** saves a copy of the page to be approved by another user on the site.
 1. Once a Post has been marked as Pending, it should not be published until it has been reviewed. If the Post is published, it's status will change to Published and it will no longer appear as Pending.
 2. *Note: You cannot specify which user needs to approve the Post before publishing. Please see the Pending Pages and Posts section for more information on establishing an e-mail based workflow with an approver.*

3. The **Published** status appears after a page has already been published. Setting a Page to Draft
2. **Save Draft/Save as Pending** - This option saves an updated copy of the page changes to WordPress where only other editors of your site can see them. It does not update the contents of the page on your website.
3. **Preview** - This option opens a new tab and displays a Preview of what your page will look like when Published.
4. **Visibility** - Change the page in question to either be Public, Password Protected, or Private and click OK.
 1. If you change the page to **Password Protected** you must enter a password of your own choosing.
 2. If you change the page to **Private**, only logged in users of your WordPress site will be able to view the page.
5. **Revisions** - As your pages are edited, previous versions of each page will be stored. A list of revisions will appear below the editor.
 1. Click on **Browse** to view saved Revisions.
 2. Use the **arrow slider** or click on **Previous/Next** to change the revision you are viewing.
 1. Click on **Compare Any Two Revisions** then use the arrow slider to compare two different versions of the page.
 3. Click on **Restore this Revision/Autosave** to revert to the desired prior version.
 4. Click on **Go to Editor** to return to the Post.
6. **Publish On** - This option allows you to schedule a date and time to publish your page.
 1. To use this option, click Edit, set the date and time, and click OK.
7. **Move to Trash** - This option will delete the page entirely.
8. **Publish** - This option will make your page appear on your live with any changes or updates.

Editing an Existing Post

1. From the menu on the left, select **Posts > All Posts**.
2. Click on the **Title** for the post.
3. When you are finished making changes to the Post, click on **Update** in the Publish section to make your changes public.

OR

1. If you are already logged into WordPress, visit the URL for the post you would like to edit.
2. Click on **Edit Post** in the toolbar at the top of the screen.
3. When you are finished making changes to the Post, click on **Update** in the Publish section to make your changes public.

Creating Anchor Links

An Anchor Link is one that allows you to create a link to a location on a Page or Post. This involves first creating the Anchor (location) and then creating the link to it. Please be aware that creating Anchor Links involves some interaction with HTML code. Please partner with your local administrator or EITS staff for assistance, if necessary.

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. Click on the **Title** for the page or post.

3. Click on the **Text** tab near the top of the page. This will display the HTML code for the page or post.
 4. Locate the place you would like to insert your Anchor. This can be text or an image.
 1. Every HTML element on the page will be wrapped with a tag. Locate the opening tag for the element you would like to turn into an Anchor.
 1. Example: The following text would create a paragraph of text. The `<p>` tag in bold is the opening tag, and p is the instruction to create a paragraph. The `</p>` tag is the closing tag, which tells our browser when the paragraph ends.
 1. **`<p>`**The quick brown fox jumps over the lazy dog.**`</p>`**
 2. Example: The following text would create a heading with a size of two. The `<h2>` tag in bold is the opening tag, and h2 is the instruction to create a heading with a size of two. The actual size, color, and font of our `<h2>` tag will be interpreted by the website template. The `</h2>` tag is the closing tag, which tells our browser when the heading ends.
 1. **`<h2>`**The quick brown fox jumps over the lazy dog.**`</h2>`**
 3. Example: The following text would create an image. The `` tag in bold is the opening tag, and img is the instruction to display an image. The src tag provides the link to the image. The `/>` at the end tells the browser that we are finished giving instructions for the image.
 1. **``**
 2. Insert an ID tag next to the opening tag of the desired location for your Anchor with a relevant name. The ID tag will begin with id and must be followed by the equal sign. The ID must lower case with no spaces and wrapped in quotes
 1. Example: `<p id="anchor-name-here">`The quick brown fox jumps over the lazy dog.**`</p>`**
 2. Example: `<h2 id="anchor-name-here">`The quick brown fox jumps over the lazy dog.**`</h2>`**
 3. Example: ``
5. Click on the **Visual** tab near the top of the page. This will display the visual editor for the page or post.
 1. Highlight the text or click on the image you would like to turn into a link.
 2. Click on the **Insert/Edit Link** icon in the editing toolbar.
 3. In the window that opens, enter the URL for the current page.
 4. After the URL, enter the hashtag symbol, followed by the ID tag from step 4.2. The hashtag symbol must be included for the link to work.
 1. Example: `https://website.uga.edu/section/pagename/#anchor-name-here`
 5. Click on the **Arrow** icon to apply the change.
6. **Publish** or **Update** the page or post to test your new links.

Working with Post Categories and Tags

Understanding Categories

In WordPress, Categories may be used to organize Posts. Depending on the setup of your site template, certain Categories of Posts may be displayed in different locations of the site. In these cases it may be a requirement to assign Categories to Posts to ensure correct placement on the site.

Creating Categories

1. From the menu on the left, select **Posts > Categories**.

2. To add a new Category enter the **Name** from the options on the left side of the screen.
3. Enter the **Slug** for your category. This will appear in the URL for your website when users browse Posts in this category.
4. Select a **Parent Category**, if applicable. The category you create will then become a sub-category of it's parent.
5. **Enter a Description**. Depending on the template your site uses, this may be displayed publicly.
6. Click on **Add New Category**.

Editing Categories

1. From the menu on the left, select **Posts > Categories**.
2. To edit a Category, hover your mouse over the category names on the right side of the screen.
3. Choose **Edit** or **Quick Edit**, depending on your preference.
 1. Selecting Edit will allow you to alter the Name, Slug, Parent Category, and Description.
 2. Selecting Quick Edit will allow you to alter the Name and Slug only.
4. When you are finished making changes, if you selected Edit, click on **Update**. If you selected Quick Edit, click on **Update Category**.

Assigning or Changing Categories Assigned to Existing Posts

1. From the menu on the left, select **Posts > All Posts**.
2. Click on the **Title** of the post that you would like to change.
3. Adjust any options under Categories, as necessary.
 1. **Check the box** next to the relevant Category for the post or click **Add New Category** to create a new one.
 2. Select **Most Used** to see the most commonly used Categories.
4. When you are finished making changes to the Post, click on **Update** in the Publish section to make your changes public.

Understanding Tags

Tags differ From Categories in that they act as keywords, highlighting pertinent information in your post. On sites where Tags are publicly displayed, a user can click on each Tag to see other articles that use it.

Creating Tags

1. From the menu on the left, select **Posts > Tags**.
2. To add a new Tag enter the **Name** from the options on the left side of the screen.
3. Enter the **Slug** for your tag. This will appear in the URL for your website when users browse Posts in this category.
4. Enter a **Description**. Depending on the template your site uses, this may be displayed publicly.
5. Click on **Add New Tag**.

Editing Tags

1. From the menu on the left, select **Posts > Tags**.
2. To edit a Tag, hover your mouse over the tag names on the right side of the screen.

3. Choose **Edit** or **Quick Edit**, depending on your preference.
 1. Selecting Edit will allow you to alter the Name, Slug, and Description.
 2. Selecting Quick Edit will allow you to alter the Name and Slug only.
4. When you are finished making changes, if you selected Edit, click on **Update**. If you selected Quick Edit, click on **Update Tag**.

Assigning Tags to Existing Posts

1. From the menu on the left, select **Posts > All Posts**.
2. Click on the **Title** of the post that you would like to change.
3. Adjust any options under **Tags**, as necessary.
 1. Enter tags separated by commas.
 2. Click on **Choose** from the most used tags to see a list of common tags.
4. When you are finished making changes to the Post, click on **Update** in the Publish section to make your changes public.

Pending Pages and Posts

While WordPress supports marking Pages and Posts as Pending Review, it does not natively support a review workflow. EITS suggest that approval workflows be incorporated into your regular editing processes using e-mail.

For instance, in this example workflow, User A serves as a content approver for User B:

1. When User B logs into WordPress, they set their Pages and Posts to Pending so they can be reviewed before appearing on the site.
2. User B then notifies User A via e-mail that the Pages or Posts are pending review.
3. User A receives the e-mail then logs into WordPress and makes any changes.
4. User A replies to User B's e-mail notifying them of the approval status.
5. Either User A or User B can Publish the Page or Post once it has been approved.

Marking Existing Pages or Posts as Pending

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. Click on the **Title** for the Page or Post you would like to mark as Pending.
3. Select Status from the **Publish** menu on the right side of the page.
4. Select **Pending Review** from the dropdown menu.
 1. Once a Post has been marked as Pending, it should not be published until it has been reviewed. If the Post is published, it's status will change to Published and it will no longer appear as Pending.
5. Click **OK** to confirm the status change.
6. Click **Save as Pending** to commit your changes.

Reviewing Pending Pages or Posts

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. From the list of options at the top, click on **Pending**.
3. Click on the **Title** of the Page or Post you would like to review.
 1. Once the Page or Post has been published it's status will be changed to Published and it will be removed from the Pending status category.

4. Review the Page or Post and click **Publish** if you are ready for the changes to be made public.

Deleting and Recovering Pages and Posts

Pages and Posts can be deleted at any time. Once a Page or Post has been moved to the Trash, it will be permanently deleted after 30 days unless restored. Only Pages and Posts that have been moved to the trash within the last 30 days may be Restored.

Pages and Posts that have been moved to the trash will be Permanently Deleted in 30 days. If you would like to Permanently Delete a Page or Post before 30 days have passed, follow these steps.

Deleting Pages and Posts

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. Hover your mouse over the Page or Post you would like to delete and click on **Trash** from the options that appear below the Page or Post title.

Restoring Pages and Posts

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. From the list of available options near the top of the page, click on **Trash**.
3. Hover your mouse over the Page or Post and click on **Restore**.

Permanently Deleting Pages and Posts

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. From the list of available options near the top of the page, click on **Trash**.
3. Hover your mouse over the Page or Post and click on **Delete Permanently**.

Changing the Author for a Page or Post

1. From the menu on the left, select **Posts > All Posts** or **Pages > All Pages**.
2. Click on the Title for the Page or Post.
3. Click on the Screen Options tab in the top right corner of the page.
4. Verify the Author option is checked.
5. Scroll down to the Author box and select a new author from the drop down menu.
6. Click on **Update** from the available options in the **Publish** box.

Working with Media

In WordPress, Media is a term used to describe all images, documents, and other files that may be inserted onto or linked to on a page or post.

Allowed File Types

The following file types can be uploaded to WordPress. For audio or video files, EITS recommends to upload these files to a media sharing platform such as YouTube, Vimeo, or Kaltura. You can then embed the media on the page of your WordPress website. A list of approved embed sources is available at <https://wordpress.org/documentation/article/embeds/>,

though media from unapproved sources may also be embedded following the steps outlined below.

- **Images**
 - .jpg, .jpeg, .png, .gif, .ico
- **Documents**
 - .pdf, .doc, .docx, .ppt, .pptx, .pps, .ppsx, .odt, .xls, .xlsx, .PSD
- **Audio**
 - .mp3, .m4a, .ogg, .wav
- **Video**
 - .mp4, .m4v, .mov, .wmv, .avi, .mpg, .ogv, .3gp

Finding Media (Images, Documents, etc.) in WordPress

1. Click on the **Media** option on the left sidebar for access to the Media Library.
2. From the toolbar near the top of the page, click on the icons on the far left side to change how the contents of the Media Library are displayed.
3. Click on the **All Media Items** dropdown to sort by media type.
 1. The **Unattached** filter displays files that were uploaded directly to the Media Library.
 1. Files that are uploaded during the creation of a Page or Post are considered Attached files.
 2. Unattached does not equal “not in use”, only how the file was uploaded. Unattached files may be in use in various locations throughout your site.
 2. The **Mine** filter will display all of the files you have uploaded.
4. Use the **All Dates** option to sort media by the month in which it was uploaded.
5. Click on **Filter** to display the results of the options you’ve selected.
6. Click on **Bulk Select** to select multiple files. This option is primarily used for deleting more than one file at a time.
7. Use the **Search** functionality to locate a file by its name.

Editing Images in WordPress

1. Click on the **Media** option on the left sidebar for access to the Media Library.
2. If you are viewing the files in a list:
 1. Click on the name of the file to Edit it.
 1. Options will vary depending on the type of file you are attempting to edit.
 1. **Images** - Edit the Title, Alternative Text, Caption, or Description.
 1. Click **Edit** Image for access to options to Crop, Scale, and Rotate your image.
 2. When you are finished editing, click on **Update** from the menu on the right to save the changes you’ve made.
 2. **Documents** - Edit the Title, Caption, and Description.
 1. When you are finished editing, click on **Update** from the menu on the right to save the changes you’ve made.
 2. Click anywhere except on the name of a file to display additional options.
 1. **Edit** - Change parameters for the specified file.
 2. **Delete Permanently** - Items that are deleted permanently are not retrievable.
 3. **View** - This option will direct you to a preview page to view the image. Click the back button in your browser to return to the WordPress Media Library.
 4. **Copy URL** - This option will copy the full URL to access the file.
 5. **Download File** - This option will download a copy of the file to your computer.

3. If you are viewing the files as icons:
 1. Click on the file you would like to edit.
 1. Options will vary depending on the type of file you are attempting to edit.
 1. **Images** - Edit the Title, Alternative Text, Caption, or Description.
 1. Click Edit Image for access to options to Crop, Scale, and Rotate your image.
 2. Changes should be automatically saved.
 2. **Documents** - Edit the Title, Caption, and Description.
 1. Changes should be automatically saved.
 2. The following additional options will appear for all file types.
 1. **View Attachment Page** - This option will direct you to a preview page to view the image. Click the back button in your browser to return to the WordPress Media Library.
 2. **Edit More Details** - Change parameters for the specified file in a different view.
 3. **Download File** - This option will download a copy of the file to your computer.
 4. **Delete Permanently** - Items that are deleted permanently are not retrievable.

Uploading Files to the Media Library

1. Click on the **Media** option on the left sidebar for access to the Media Library.
2. Click on the **Add New** option that appears below Media.
3. Select or drag the file(s) you would like to upload.
4. Once the file has uploaded, click on **Copy URL to Clipboard** or **Edit** for more options.

Downloading Files from the Media Library

1. Click on the **Media** option on the left sidebar for access to the Media Library.
2. Click on the file you would like to download.
3. From the options in the bottom right corner, click on **Download File**.

Permanently Deleting Files from the Media Library

All media that is deleted from the Media Library will be permanently deleted. Please take caution before using this feature.

1. Click on the **Media** option on the left sidebar for access to the Media Library.
2. Click on the file you would like to delete.
3. From the options in the bottom right corner, click on **Delete Permanently**.
4. Confirm that the file should be permanently deleted in the window that appears.

Embedding Media on a Page or Post

Embedding audio and video files prevents users from experiencing lengthy download times and can help cut bandwidth costs related to your site. EITS recommends that all audio and video files be embedded.

1. If you are inserting media from a WordPress approved source (YouTube, Vimeo, etc.), follow these steps. A list of approved sources from which to embed media can be found at <https://wordpress.org/documentation/article/embeds/>. These options may work for some but not all media from approved sources.
 1. Navigate to the Page or Post in question and place your cursor where the media should be inserted.

2. Click on **Add Media** located under the Title of your post.
3. In the window that appears, click on the option **Insert from URL** from the available options on the left side.
4. Paste the URL for your approved embed source.
5. Click on **Insert Into Post** in the bottom right corner of the screen.
6. Verify the media appears as desired and continue making any other changes necessary.
 1. If the media does not appear as desired, delete the inserted text and try the steps to embed an unapproved source outlined below.
2. If you are inserting media from a source that is not WordPress approved (Kaltura, etc.), follow these steps.
 1. Navigate to the Page or Post in question.
 2. Click on the **Text** tab at the top of the editing window. This option allows you to view the code that comprises your page.
 3. Place your cursor where the media should be inserted.
 4. Open another tab or window in your browser and navigate to the media you want to embed. Locate the provided embed code and copy it.
 5. Return to the WordPress tab or window and paste the code you copied earlier.
 6. Click on the **Visual** tab at the top of the editing window to return to the Visual Editor.
 7. Verify the media appears as desired and continue making any other changes necessary.

Working with Menus

In WordPress, navigation menus and section menus are simply called Menus and can only be edited by an Administrator. Please partner with your local Administrator for assistance with menus.

Editing Your Profile

A Profile is displayed by clicking on an author name that is displayed on a Post or Comment. Depending on the configuration of your template, author names may not be displayed on your site, thus the profile information will not be displayed publicly to any users of your site.

1. Click on the **Profile** option on the left sidebar to begin editing your profile.
 1. **Personal Options**
 1. **Visual Editor** - Select “**Disable the visual editor when writing**” to edit Pages and Posts in plain text.
 2. **Admin Color Scheme** - Select a desired color scheme for the WordPress editing interface.
 3. **Keyboard Shortcuts** - Select “**Enable keyboard shortcuts for comment moderation**” if you would like to use shortcuts while moderating comments. Comments may be disabled on certain sites and this option would not appear.
 4. **Toolbar** - Select “**Show Toolbar when viewing site**” to enable or disable the toolbar that appears when viewing your public website.
 2. **Name**
 1. **Username** - Usernames cannot be altered and must match your UGA MyID.
 2. **First Name, Last Name, and Nickname** - Alter these fields to influence how your name may be displayed on the site, if applicable.
 3. **Display Name Publicly As** - Choose the correct representation for your name. This will only be displayed on the site if the template is configured to use this field.
 3. **Contact Info**

1. **Email** - As UGA e-mail aliases are subject to change, your e-mail should always be represented as your MyID followed by @uga.edu.
 2. **Website** - Enter a representative website.
 4. **About Yourself**
 1. **Biographical Info** - Enter your bio information.
 2. **Profile Picture** - Adding a Profile Picture requires the creation of a Gravatar account. Click on “You can change your profile picture on Gravatar” for further information.
 5. **Account Management**
 1. **New Password** - Click Set New Password to update your WordPress password. Please note: If your site has SSO authentication enabled, you will login with your MyID and associated password instead.
 2. **Sessions** - This option allows you to log out of any active WordPress sessions.
 6. **Application Passwords** - Please refrain from making any changes to this portion of the Profile.
2. When you are finished making changes, click on **Update Profile** at the bottom of the page.