Wordpress GC Knowledge Base Admin – SOP – V1.1

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1 Purpose

1.1 The purpose of this SOP is to outline the main functions which are typically performed by an Administrator of the Wordpress GC Knowledge Base.

2 Responsibility

2.1 The responsibility solely relies upon the designated IT Department member or members for handling GC Knowledge Base Administration.

3 Signing On

- 3.1 Before you can carry out any Wordpress back-end admin work, you have to login to private.g-c.com with your Admin user ID and password.
- 3.2 After entering your Admin user credentials, you will be presented with the screen below, where you now will have full access to both Wordpress Admin + GC Knowledge Base Admin regular front-end screens.

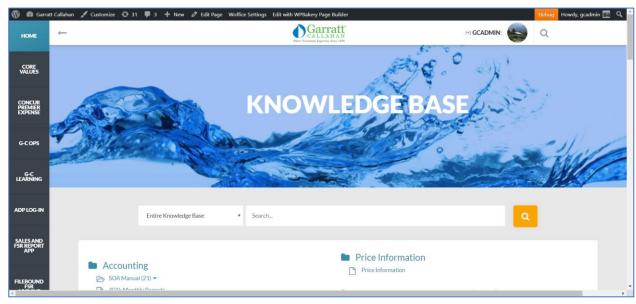


Figure: GC Knowledge Base front-end

Warning: It is important to be very careful when making any of the changes outlined in this admin guide, because if they are done incorrectly, there can be an impact upon the use of the knowledge base throughout the company. But at the same time it is important for you as an Administrator to explore the backend of Wordpress so that you are comfortable with the changes that have to be made to support the system and keep it running smoothly.

4 Accessing the Wordpress dashboard

4.1 After successfully logging in to GC Knowledge Base and with the screen above displayed, click on the Wordpress logo in the top left position of the screen as shown below

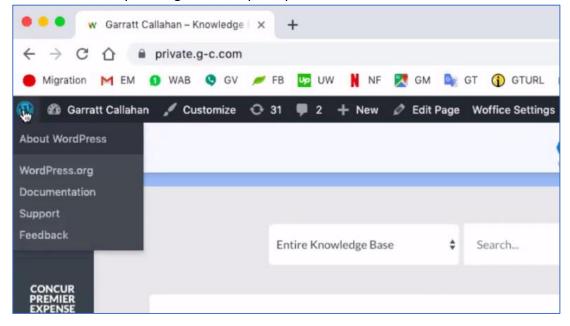


Figure: Clicking on Wordpress logo to access dashboard

4.2 When the Wordpress logo is clicked, the Wordpress dashboard is displayed

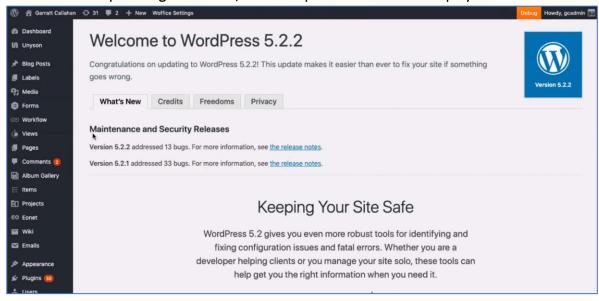


Figure 3 – Wordpress dashboard

- 5 Create a user
- 5.1 Note: GC users e.g user@g-c.com are created automatically when they log in with Google, so there is no need to actually create them. But you can, technically create them before they are logged in and add roles to them.
- 5.2 An internal GC user will be initially assigned a role of 'Subscriber' which only allows read access to the unrestricted areas of the knowledge base. To provide the user with additional capabilities and permissions, it is necessary to assign additional roles see section 7 Assign a role to user
- 5.3 In situations where you want to add a new user who is an external GC user or is a GC internal user who has not used the 'login with Google' option, then follow the steps below. Scroll down on the dashboard screen until Users option is shown on the sidebar menu, then select Add New from the sub-menu

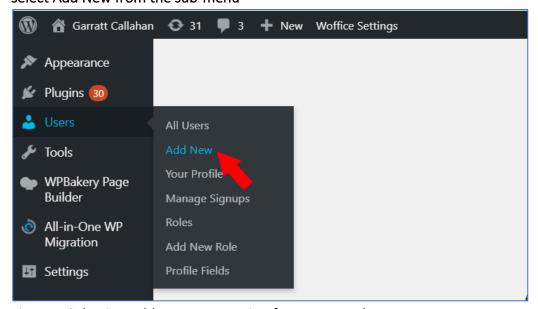


Figure – Selecting Add New User option from Users sub-menu

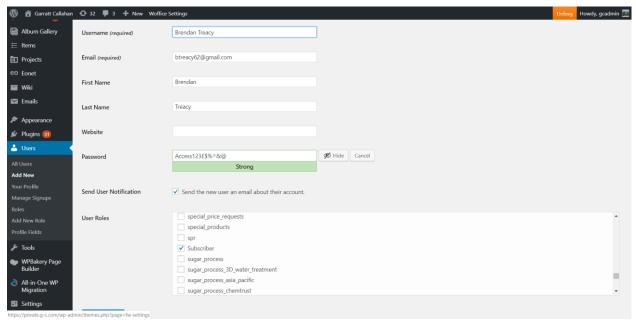


Figure: Add New User Screen for external user access

The required fields are:

Username - full name in standard format

Email – in standard format

Password – note use of strong password

User Role – this field is set to **Subscriber** by default but can be set to other defined roles which allow access to specific areas within the GC Knowledge Base – see section 7 <u>Assign a role to user</u>

- 6 Create a new role
- 6.1 Scroll down on the dashboard screen until Users is shown on the sidebar menu, then select Add New Role from the sub-menu

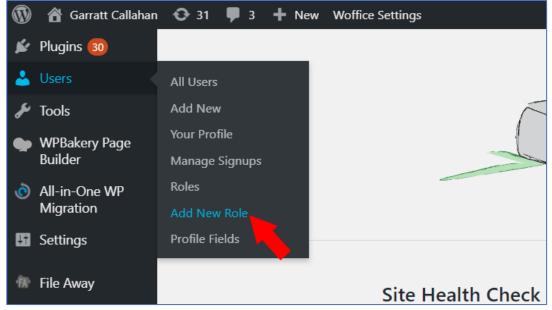


Figure: Selecting Add New Role option form Users sub-menu

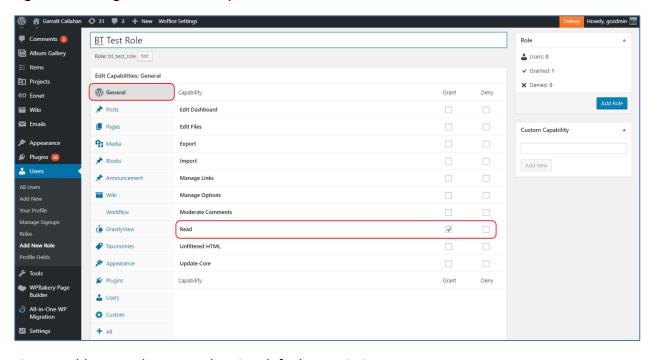


Figure: Add New Role screen showing default permissions

A Role is simply the capability a user has to access items like Posts, Pages and Wikis within the knowledge base. So, default capability would allow access to Posts and Pages, but if access is also required to upload images or access Wikis then these capabilities will have to be specifically assigned. Permissions can also be set to distinguish between what different roles are allowed to do e.g Read or Publish.

Note: Posts are not used in this Wordpress installation, but Pages can be used for templates and other basic info. So, if Pages are used, they could then be linked from the knowledge base main page sidebar menu (the narrow one on the left side, vertical, in black) – Contact your web support dept/company to avail of this feature.

7 Assign a role to user

WordPress comes with a user role management system which defines what a specific user can and cannot do on your website. Knowing these user roles and permissions are essential as your WordPress site grows.

When Wordpress is initially installed, there are five default user roles:

- Administrator
- Editor
- Author
- Contributor
- Subscriber

Within the User Roles section of Wordpress, there are many additional roles set-up to provide access to specific areas of the knowledge base to GC staff.

7.1 The first step to take before assigning a role to a user is to ensure that the role you wish to assign will allow the user to access the Wiki pages they need to do their job.
Scroll down on the dashboard screen until Users option is displayed on the sidebar menu, then select Roles from the sub-menu

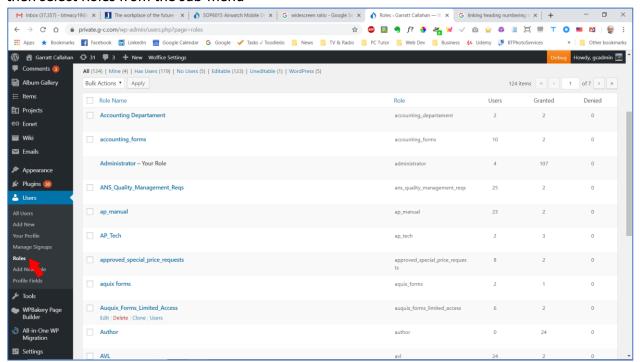


Figure: User Roles List

- 7.2 Once you are clear on what Wiki pages within the knowledge base will become available to a user by assigning a particular role, then you can proceed with this step.
- 7.3 Scroll down on the dashboard screen until Users option is displayed on the sidebar menu, then select All Users from the sub-menu

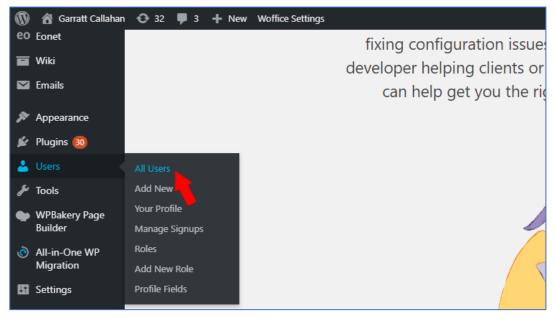


Figure: Selecting All Users option

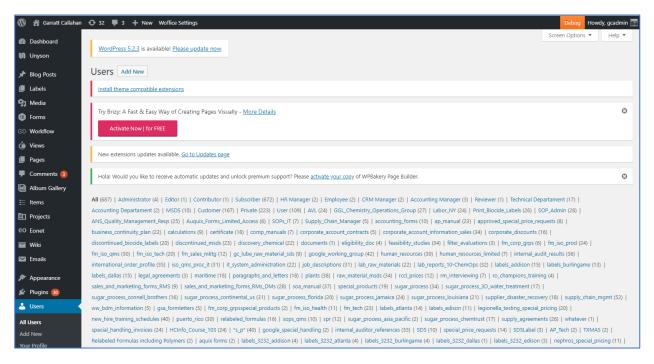


Figure: All Users listing initial screen

7.4 Scroll down on screen above to display User list

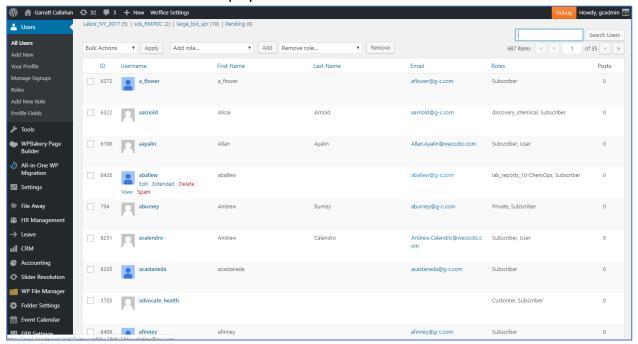


Figure: User listing screen

7.5 Enter Username into search box and click 'search users' button

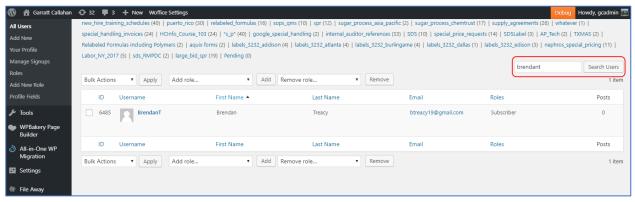


Figure – All Users list with criteria entered in Search box

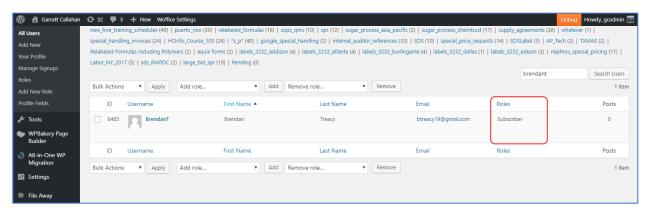


Figure: All User list search result showing roles assigned

7.6 Click on 'Edit' to assign User Roles

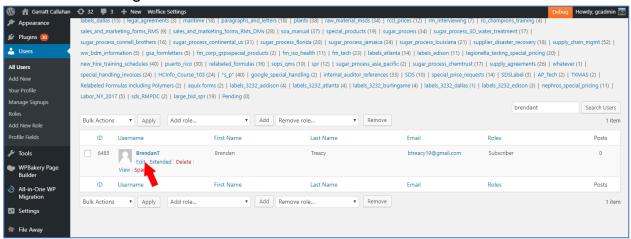


Figure – All User list search result with edit options shown

7.7 Assign the User Roles as required and click on 'Update user'

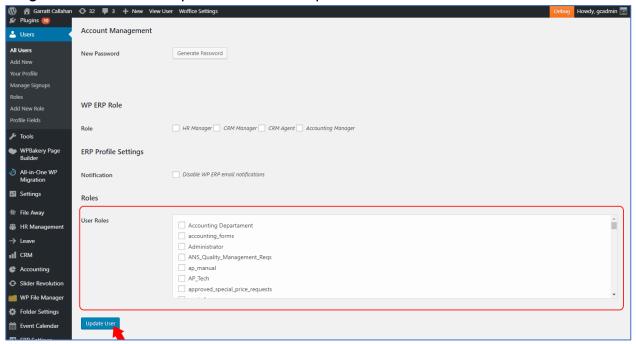


Figure – Edit User screen

Note: The default **User Role** for a new user is 'Subscriber', so you may have to unassign that **User Role** before you can assign a specific one to a user.

See section 13 Make a page secure/limited access (only accessible by users with a specific role) for example of assigning a specific User Role.

- 8 Create a Wiki page with some content from the Web
- 8.1 Scroll down on the dashboard screen until Wiki option is shown on the sidebar menu, then select Add New from the sub-menu.

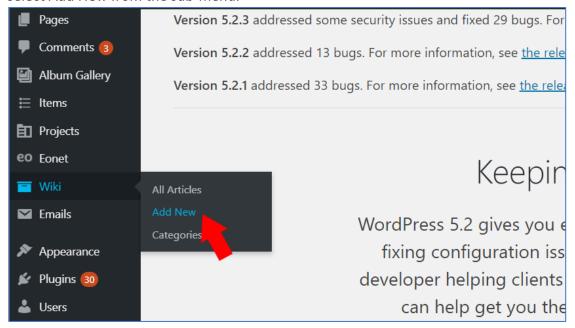


Figure: Selecting Add New option from Wiki sub-menu

8.2 Add New Wiki page

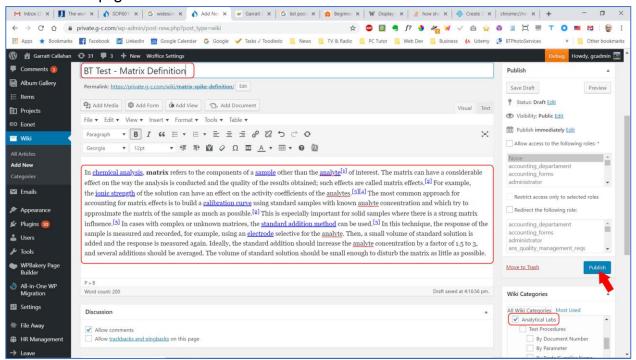
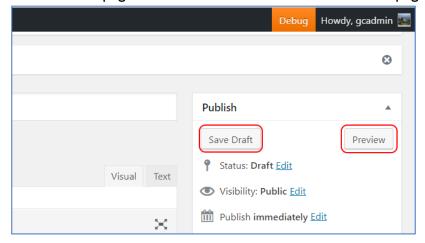


Figure: Wiki page in edit mode

In the above new Wiki page screen, the following three elements were added to make up a basic Wiki page: Title, Content and Wiki Category

Note: Make sure you are in Visual editing mode by clicking 'Visual' tab

8.3 View the Wiki page in draft mode and test out the new wiki page



Click on 'Save draft' followed by 'Preview'

- 8.4 Once you satisfied with how the page looks, you can then publish the Wiki page so that it is available within the knowledge base click on 'Publish' button shown in section 8.2
- 8.5 If the above page is published, then a link will be added to knowledge base main screen below.



Figure: Knowledge base main screen – BT Test page is accessible under Analytical Labs section

Note: In this case, the page has a Wiki Category (as shown on screen in 8.2 above), but if a Wiki page is not assigned a Wiki Category - the page is just held in knowledge base to be linked to by another page. It will not show up on the main page.

8.6 Clicking on the link above will display the Wiki page below:

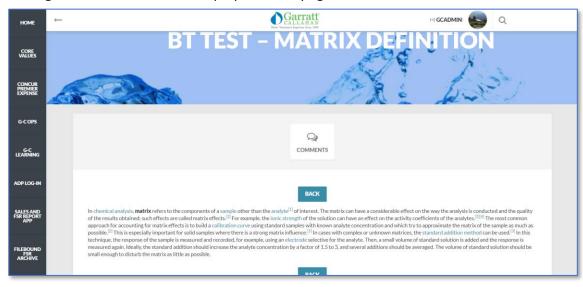


Figure: View of Wiki page - BT Test page from the knowledge base front-end

- 9 Create a Wiki page with a link to a PDF document
- 9.1 Locate a document by searching for 'Matrix Method' within entire knowledge base and the click on a search result to display the PDF document

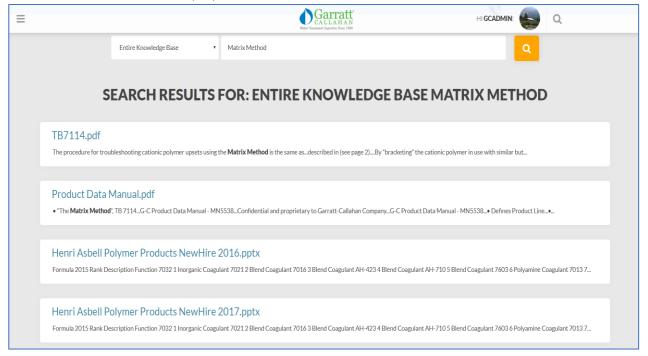


Figure: Search results for 'Matrix Method'

9.2 Copy the document URL from the address bar of your chosen browser

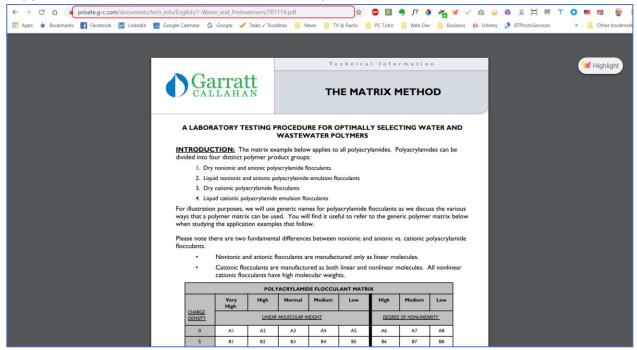


Figure: Viewing pdf document which is held in documents directory of web server

- 9.3 Scroll down on the dashboard screen until Wiki option is shown on the sidebar menu, then select Add New from the sub-menu
- 9.4 Select Add Document button to display sequence of modal screens below

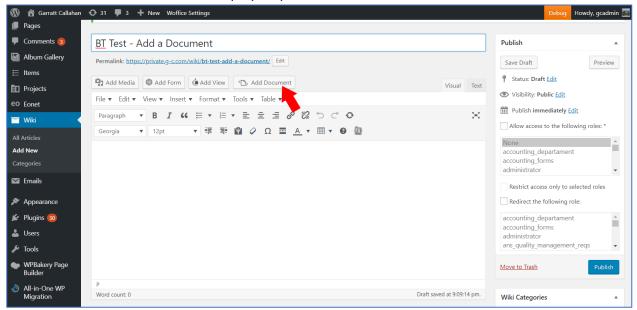


Figure: Create New Wiki page screen

9.5 Click on Add from URL option

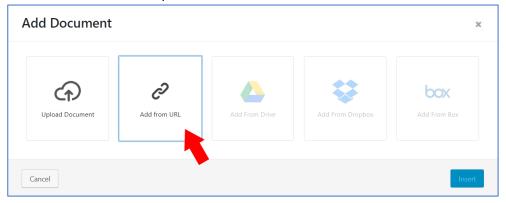


Figure: Add Document link screen 1

9.6 Paste the document URL copied in section 9.2 above



Figure: Add Document link screen 2

9.7 Adjust any of the formatting options if necessary, and then click Insert

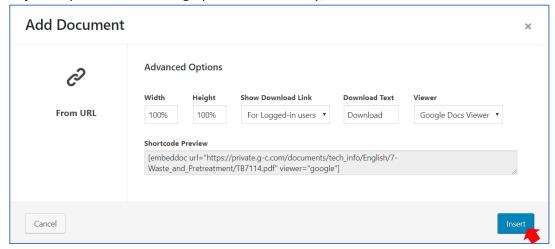


Figure: Add Document link screen 3

9.8 After stepping through the Add Document screens, a WP Shortcode is inserted

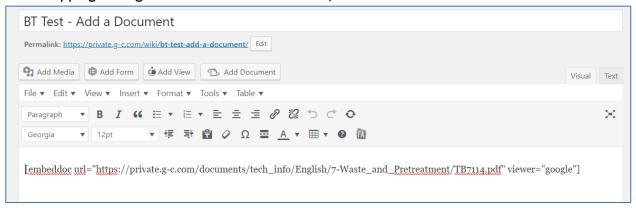
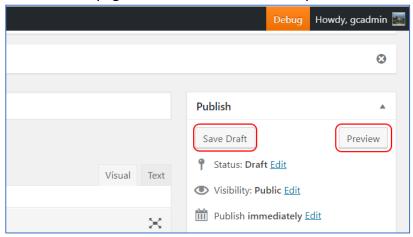


Figure: Create New Wiki Page with Add Document WP Shortcode

9.9 View the Wiki page in draft mode and test out your link



Finally, click on 'Save draft' followed by 'Preview'...

9.10 The document will be displayed within the knowledge base as shown below in preview mode

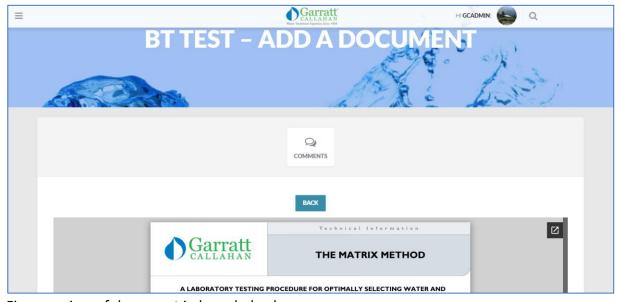


Figure – view of document in knowledge base

9.11 Once you are satisfied that the preview of the document is working properly then you can publish the Wiki page by clicking on the 'Publish' button

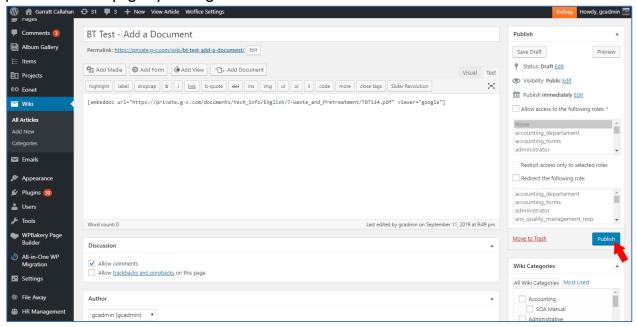


Figure – Wiki page in edit mode for Add Document link

- 10 Create a Wiki page as "directory style"
- 10.1 Locate an existing directory page within the knowledge base, and click 'Edit Article'

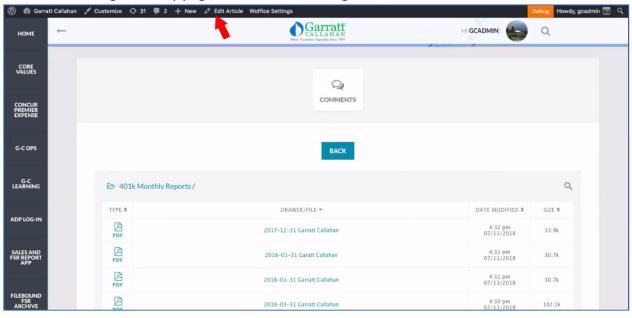


Figure: Existing directory page within knowledge base

10.2 Copy the WP Shortcode

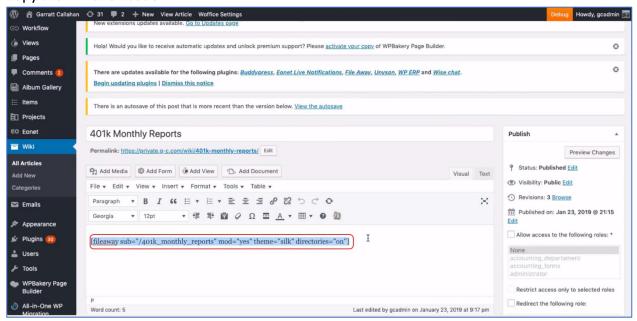


Figure: Wiki page in edit mode

10.3 Create Wiki page and paste WP shortcode retrieved above

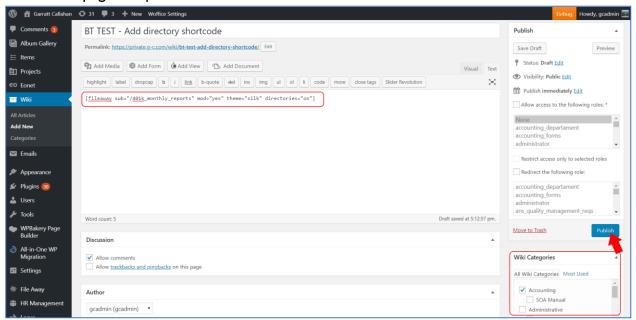


Figure: WP Shortcode pasted from 401k Monthly Reports live page

Note: Rather than access a live directory page as shown above, it would be better practice to copy the WP shortcode format and change the sub parameter as shown below.

Format of WP shortcode to use for your directory listing Wiki pages:

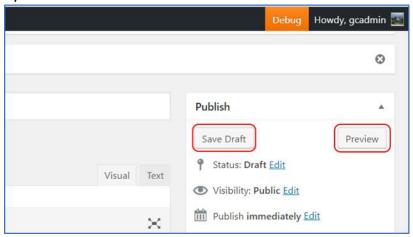
[fileaway sub="/sub-directory_name" mod="yes" theme="silk" directories="on"]

10.4 Retrieve sub-directory from documents directory URL retrieved by accessing the documents directory and copying the document directory URL.

e.g If the documents directory URL = https://private.g-c.com/documents/test directory

then the highlighted /sub-directory_name above should be changed to "/test directory"

10.5 View the Wiki page in draft mode and test out your link by clicking on 'Save draft' followed by 'Preview'...



Once you are satisfied that the preview of the directory listing is working properly then you can publish the Wiki page by clicking on the 'Publish' button shown in section 10.3

Note: Before you publish the directory listing Wiki page, be mindful of the Wiki Category that you have selected as shown in section 10.3.

- 11 Restore a page to previous revision
- 11.1 If a page has had revisions made to it, there will be a Revisions count present in the righthand side-bar page options.
 - So, if you need to restore a Page to a previous version, click on the 'Browse' link beside it.

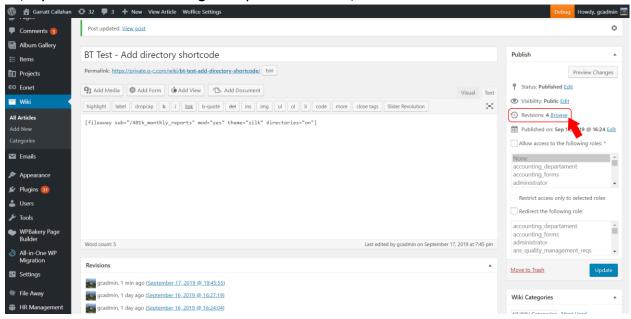


Figure: Edit a Page with Revisions count highlighted

11.2To navigate through the revisions, you can click on 'Previous' button or use the slidebar in the center. When you have clicked 'Previous' button, then 'Next' button becomes available to go forward again.

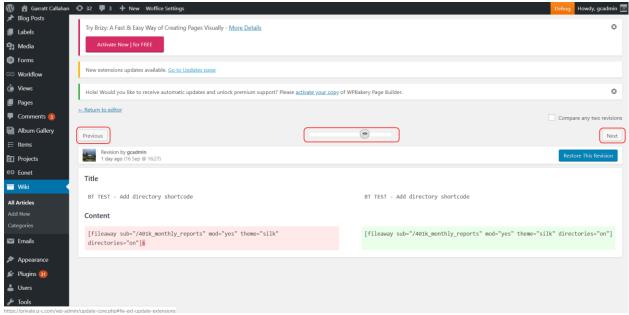
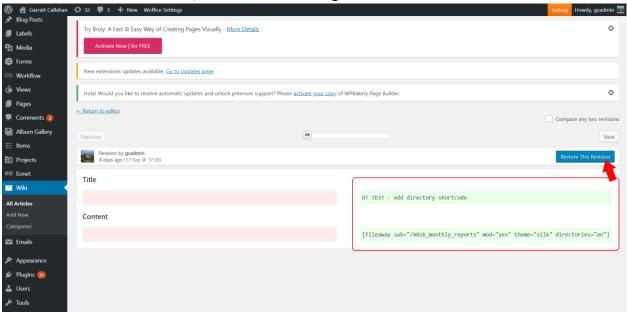


Figure: Restore revision screen with navigation controls highlighted

11.3 In this demo, the version is to be restored is shown on the right, so by clicking on the 'Restore This Revision' button, the version on the right will be restored.



12 Add a link to a page to create a Wiki page of links

12.1 Copy the URL address from a Web page on the internet

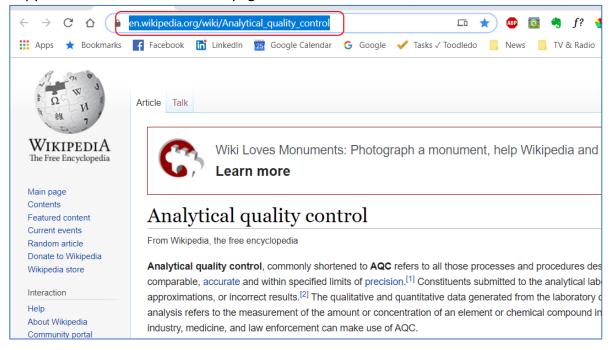


Figure – Wikipedia page

12.2 Create a Wiki page with a link to Wikipedia page

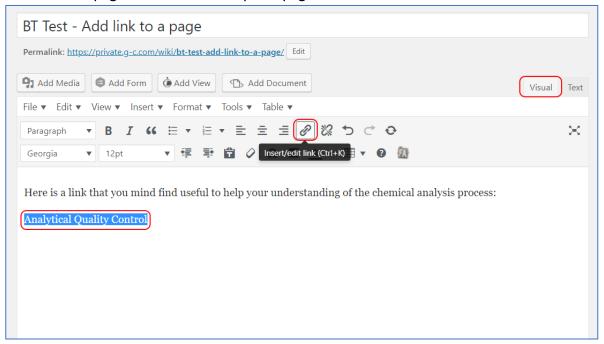


Figure: Wiki page in edit mode for add a link option

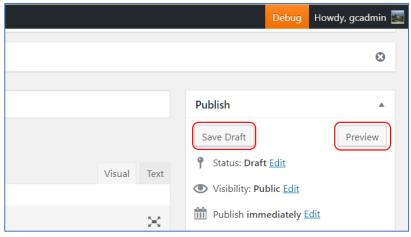
Highlight the text to be turned into a link, and then click on the Insert link icon

Note: Make sure you are in Visual editing mode by clicking 'Visual' tab



Click on the 'Apply' button and the link will be created

12.3 View the Wiki page in draft mode and test out your link



Finally, click on 'Save draft' followed by 'Preview

12.4 Once you are satisfied that the preview of the link is working properly then you can 'publish' the Wiki page as shown in section 9.11 above.

- 13 Make a page secure/limited access (only accessible by users with a specific role)
- 13.1 Add New Role
 - 13.1.1 Scroll down on the dashboard screen until **Users** option is shown on the sidebar menu, then select **Add New Role** from the sub-menu

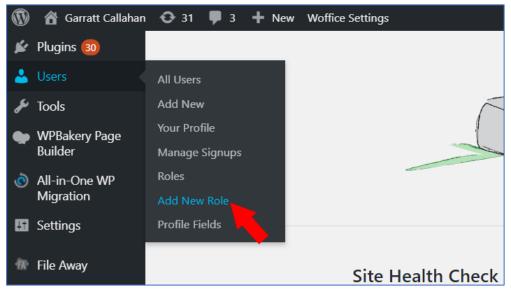


Figure: Selecting Add New Role option from Users sub-menu

13.1.2 In the General section, ensure that read permissions are granted by default

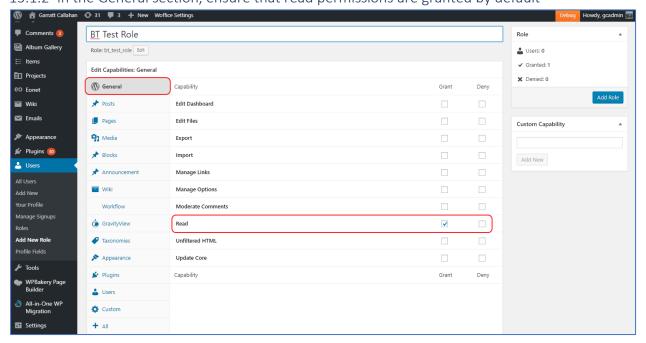


Figure – Set General permissions on add role screen

13.1.3 In the Wiki section, grant 'woffice_read_private_wikies' access permissions

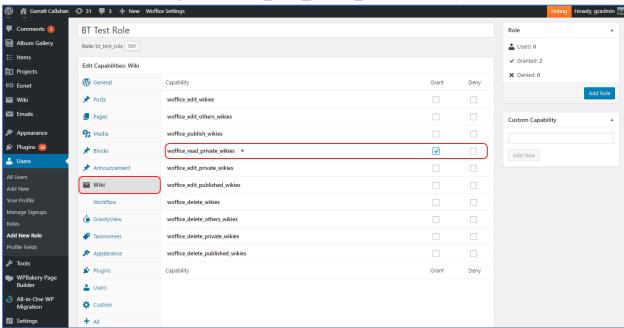


Figure – Set Wiki permissions on add role screen

13.1.4 In the Custom section, grant access to 'woffice_read_wikes' by scrolling to end of section.

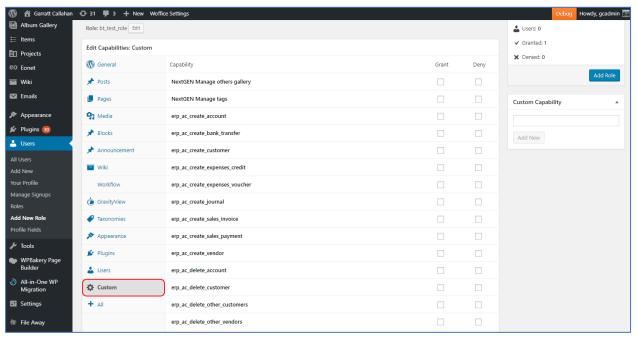


Figure: Set Custom permissions on add role screen (see next screenshot also)

13.1.5 Grant access to custom setting - 'woffice read wikes'

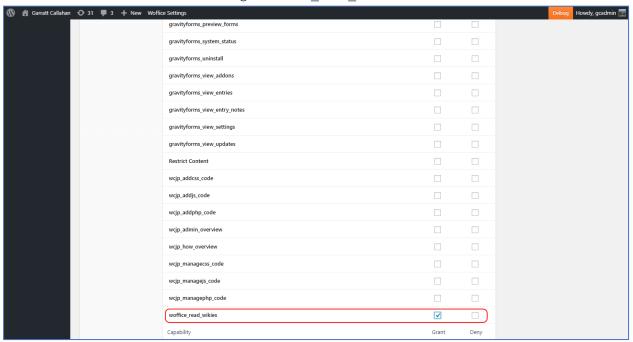


Figure: Set Custom permissions on add role screen

Now at this point in demo, the role 'BT Test Role' has been defined as a role that allows access to Wiki pages. So the next step is to assign that role to the User.

13.2 Assign Role to User

13.2.1 Scroll down on the dashboard screen until **Users** option is displayed on the sidebar menu, then select **All Users** from the sub-menu

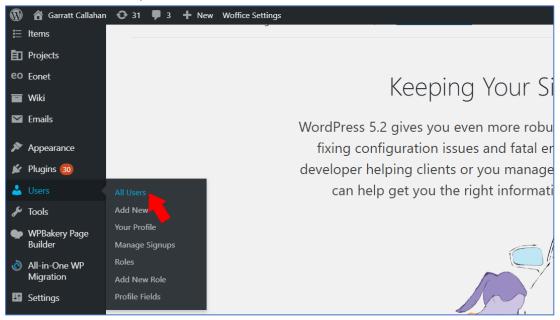


Figure: Selecting All Users option

13.2.2 Edit User to assign role

Enter Username into search box and click 'search users' button

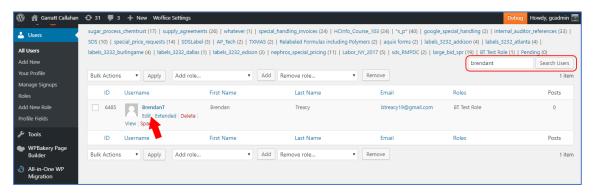


Figure: Users listing for search result

13.2.3 Assign BT Test Role as setup with Wiki access in section 13.1

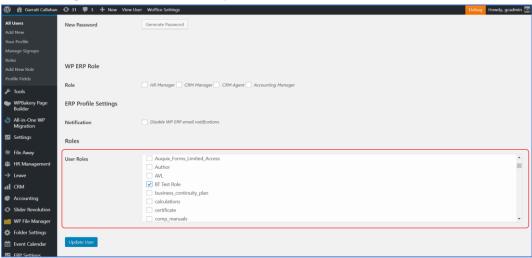


Figure: User screen in edit mode

13.2.4 Unassign the Role 'Subscriber' and click **Update User**



Figure: User screen in edit mode

13.3 Restrict Access to Article

13.3.1 Scroll down on the dashboard screen until **Wiki** option is shown on the sidebar menu, then select **All Articles** from sub-menu

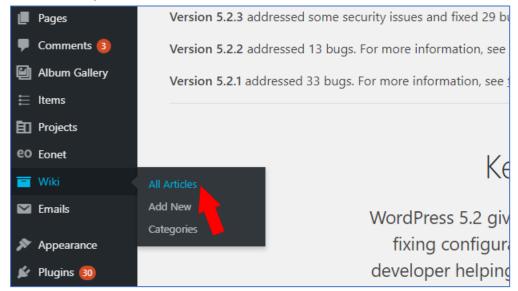


Figure: Select All Articles option from Wiki sub-menu

13.3.2 When all Wiki articles are displayed, click on ID column heading to sort in descending sequence to show latest articles.

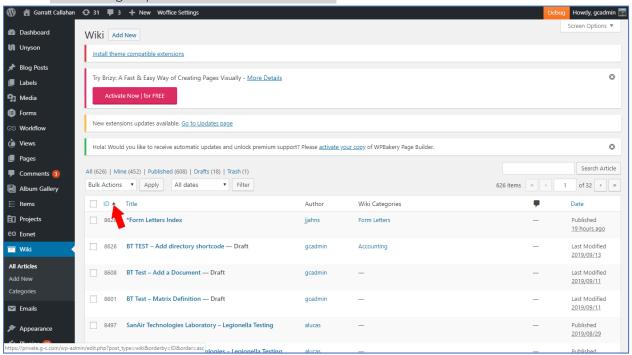


Figure: Wiki articles listing sorted in descending order by ID column

13.3.3 Click on 'Edit' for the document you want to make accessible to specific role

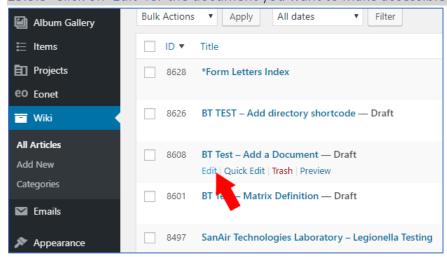


Figure: Wiki articles listing showing document to be edited

13.3.4 Assign Role to document and restrict access

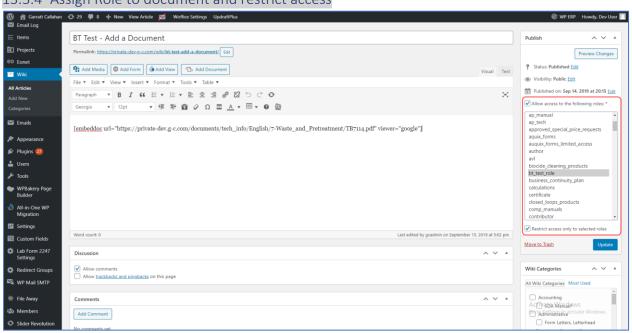


Figure: Wiki page in edit mode showing role assignment/restriction options

In the red box, click on checkbox 'Allow access to the following roles', then click on the role which is to be assigned i.e 'bt_test_role', and finally click on checkbox 'Redirect access only to selected roles'

13.3.5 Login into another test user and check that document link has restricted access

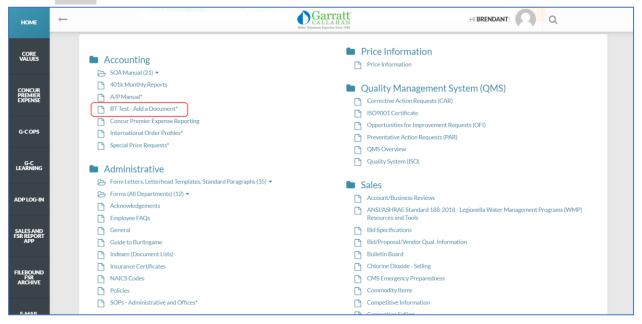


Figure: Knowledge base main screen showing Wiki page preceded by an '*'

13.3.6 Ensure that Wiki page has restricted access for other users

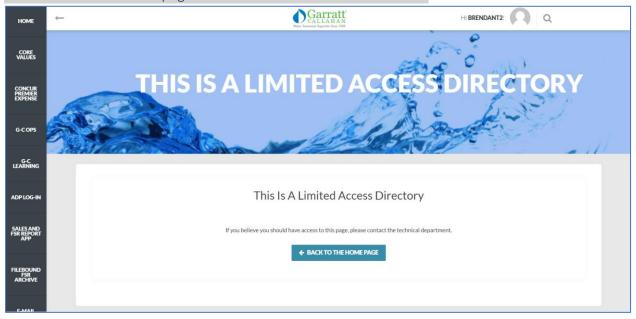


Figure: Limited Access message displayed for another user

Note: - From the knowledge base main page, there are two ways for a user to display Wiki pages: either by clicking a link on the main page, or through a link on one of the inner pages (an inner page being simply a Wiki page with links to other Wiki pages, as shown in section 10 - Create a Wiki page as "directory style" above). On the main page, if one of those Wiki page links have an asterisk next to it, it means the page is restricted, but for an inner page, the editor of the page needs to add the asterisk manually next to the link, to indicate that the page is restricted.

14 Redirect a non-subscriber user directly to a specific page after logging in Note1: A regular GC user should never be redirected using the method below. This method should only be used to give access to a single wiki page to a non-subscriber i.e an external user who needs access for genuine business purposes.

Note2: It should also be noted that a non-subscriber can't be part of two redirect groups so this means you can't redirect to different Wiki articles with this method.

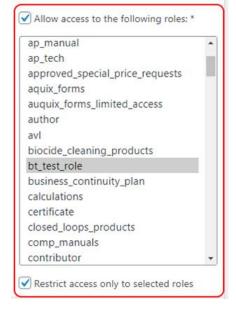
Definition: Role: A Role is simply the capability a user has to access items like posts, pages and Wikis within the GC Knowledge Base. The default Role for a new user is 'Subscriber' which would give access to all Wiki pages, except those with restricted access.

Definition: Non-subscriber – An external user who can only be given access to Wiki pages via the Redirect Groups feature described in this section.

Definition: Redirect Group – A feature described in this section to redirect non-subscribers to a specific Wiki page after they login.

The screen snippet on the right is taken from the Wiki edit article screenshot as shown in section 13.3.4 - Assign Role to document and restrict access. In the top left, you can see the checkbox 'Allow access to the following roles' – this is only used for users who are non-subscribers and where the **Wiki page will be linked from another Wiki page** which has been redirected using the Redirect Groups feature.

So, this means that the main redirected Wiki page that is given access by the Redirect Groups feature will not have the above checkbox clicked as **permissions are inherent in using the feature**, but linked Wiki pages, off the main redirected page, would have to be given access via this feature.



Note: Also shown in the bottom left is the checkbox 'Restrict access only to selected roles' – this checkbox is strictly for subscribers and it prevents them from viewing the Wiki page unless they are assigned one of the above specified roles. It has no effect on the Redirect Group feature.

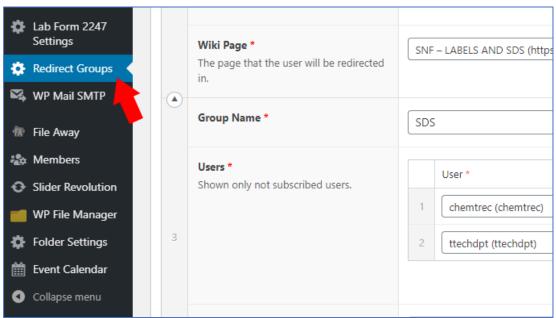
The following conditions must be true to proceed with this section:

Condition1 = The user only needs to be a non-subscriber and not currently assigned to any redirect group.

Condition2 = If the Wiki page is allowing access to specific role(s) (as shown above) then the user must be assigned one of these roles.

14.1 Create a Redirect Group

14.1.1 Scroll down on the dashboard screen and select **Redirect Groups** option from the sidebar menu



14.1.2 Click on Add Group button and input Group details

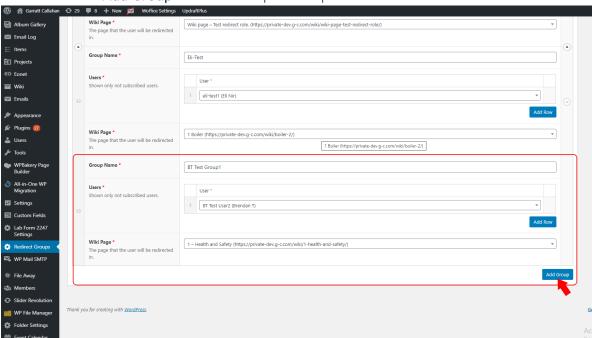


Figure: Redirect Groups page after Add Group button has been clicked and data input Enter Redirect Group details as shown in table below:

Field name	Description
Group Name	Text identifier for group
User	When Add Row button is clicked, a dropdown list will be
	displayed allowing you to choose from a list of non-subscribers

	i.e Users who don't have a subscriber role nor are assigned
	to a different redirect group.
Wiki Page	Non-restricted Wiki pages will be listed from which you can
	select one that the user will be redirected to.

14.1.3 When you have entered Redirect Group details, then click on Update at top of page

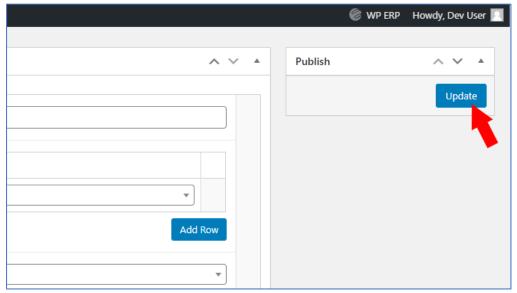


Figure: Redirect Groups update button

14.1.4 Login to external user to prove that only the restricted article is displayed



Figure: GC Knowledge Base Restricted article which can only be viewed by nonsubscriber