PWD Admin. & Content Editor User Manual
Using your new WordPress Environment

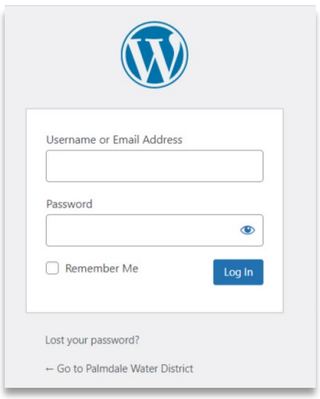
PWD Website Functionality List:

- Login Page 2.
- Your Dashboard Page 2.
- Creating a Page Page 3.
- Editing a Page Page 9.
- Creating a New Form Page 14.
- Editing a Form Page 20.
- Editing a Header Menu Page 21.
- Creating Posts and Categories Page 24.
- Creating Tables – using TablePress Page 27.
- Importing Tables – using TablePress Page 36.
- Exporting Tables – using TablePress Page 36.
- Working with Oasis Workflow Management Page 37.
- Working with your Chatbot Page 41.
- Working with your Media Library Page 44.
- Working with dFlip Books Page 45.
- Working with Yoast SEO Page 47.
- Monster Insights Page 49.
- Adding a User Page 51.
- Reviewing your Activity Log Page 54.

This guide is designed to provide the basic steps to manage the PWD backend functionalities using the Administrator and Content Editor Dashboards.

Log In

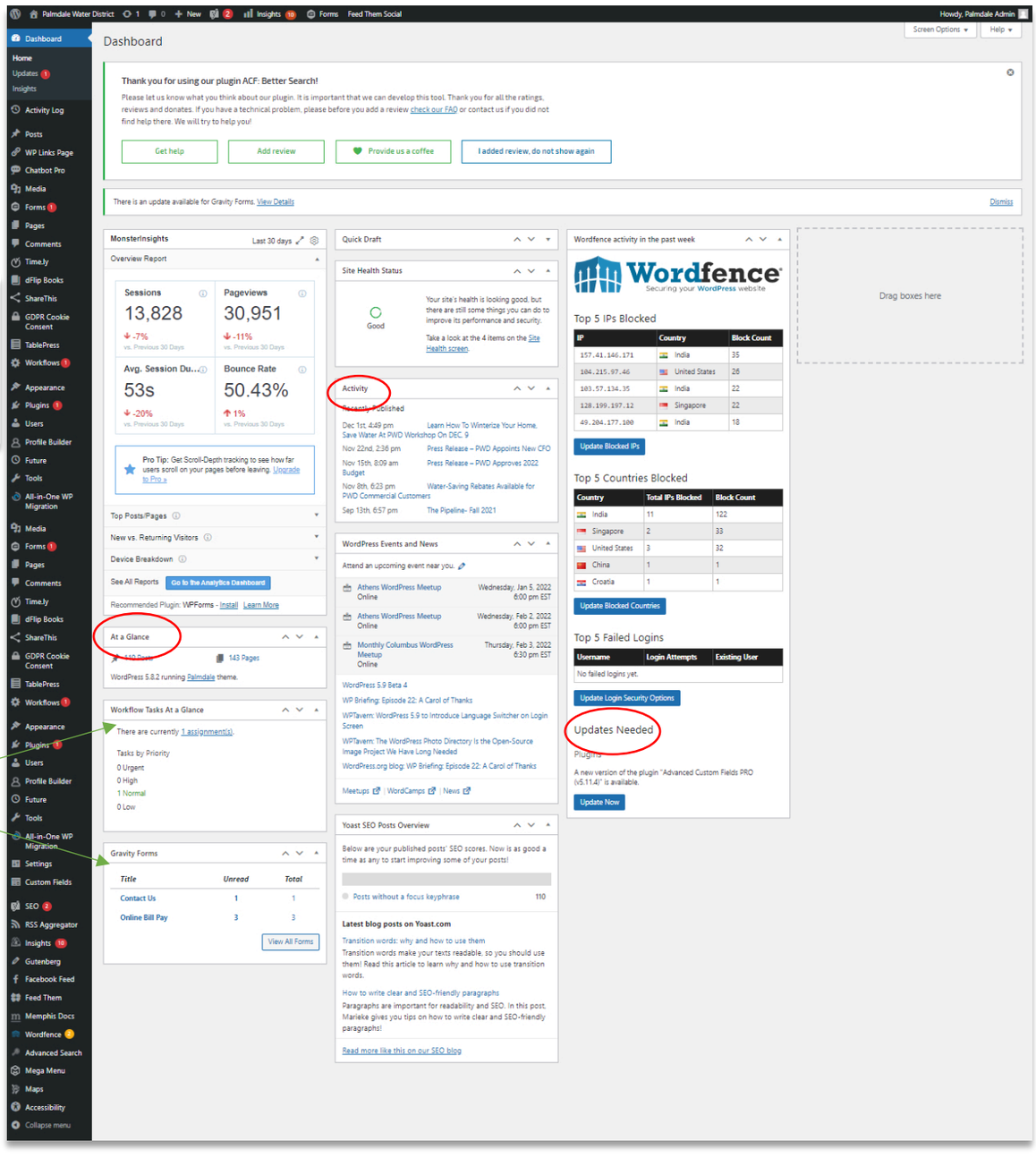
1) We suggest using one of these recommended web browsers: Google Chrome, Mozilla Firefox, Safari or Edge
2) go to https://www.palmdalewater.org/wp-admin
3) You'll see the following login page where you need to type in your PWD username and password and click on "Log In". One example admin login information is:
    a Username: (Insert Yours)
    b Password: (Insert Yours)



4) Once logged in you'll be directed to your Admin Dashboard which will look like this.

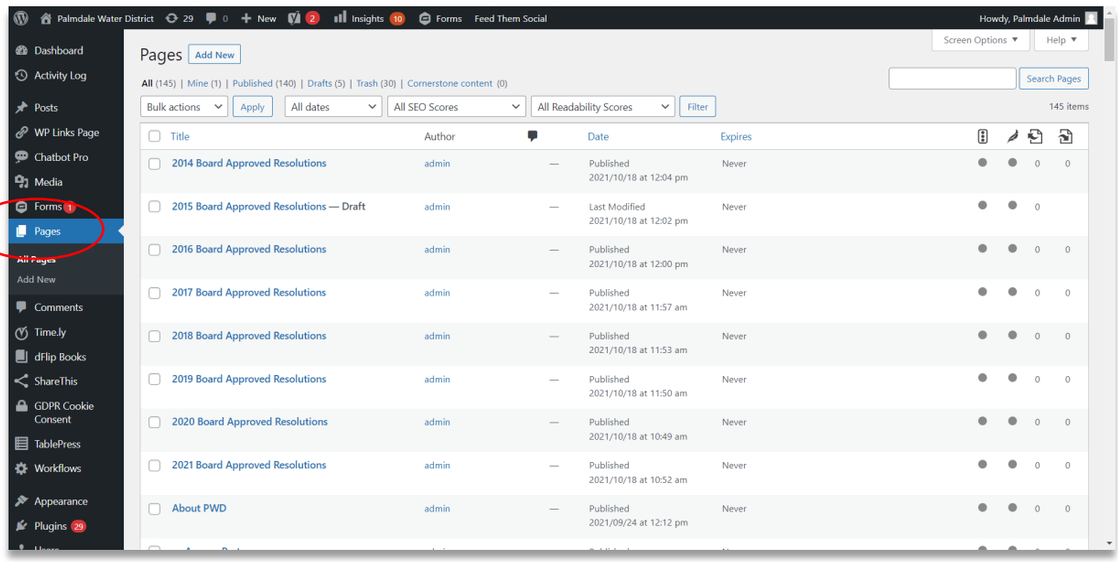
The left sidebar of the dashboard has the modules you'll enter to work within the site

Note the "Workflow", "Gravity Forms" & "Activity" Dashboards

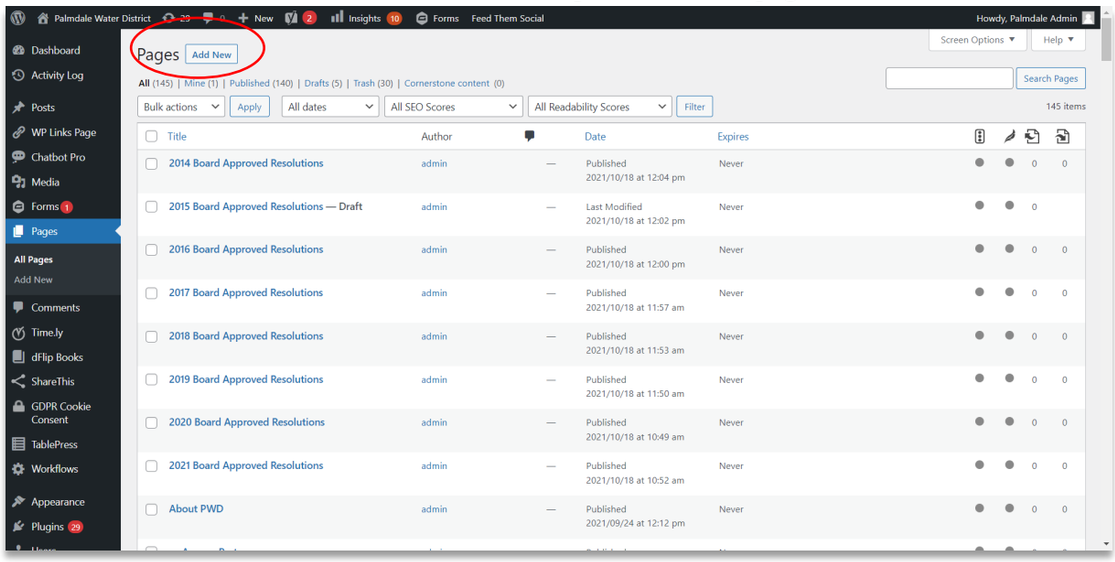


Creating a page

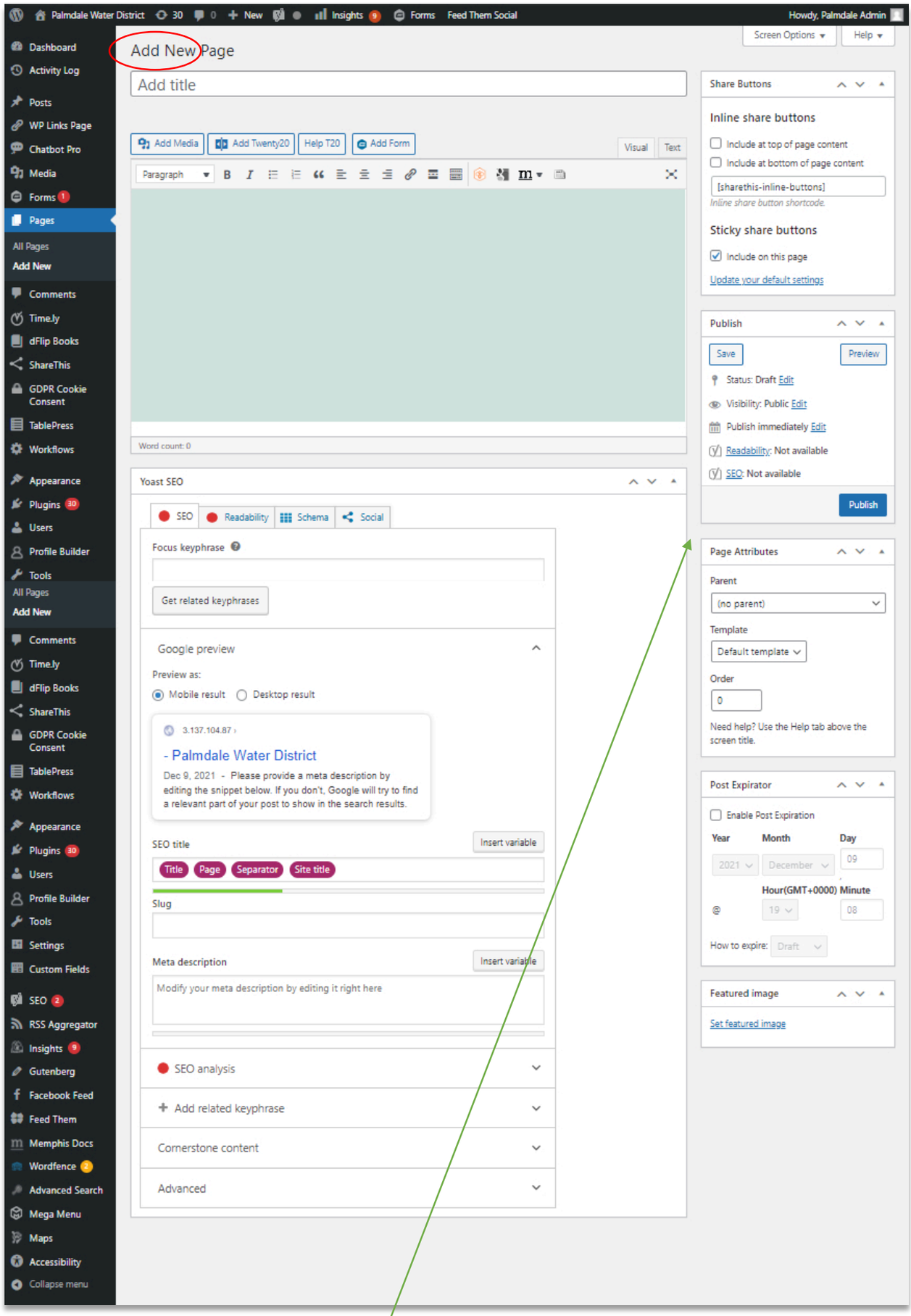
1. On the admin page, click on the ‘Pages’ option present in the left sidebar.



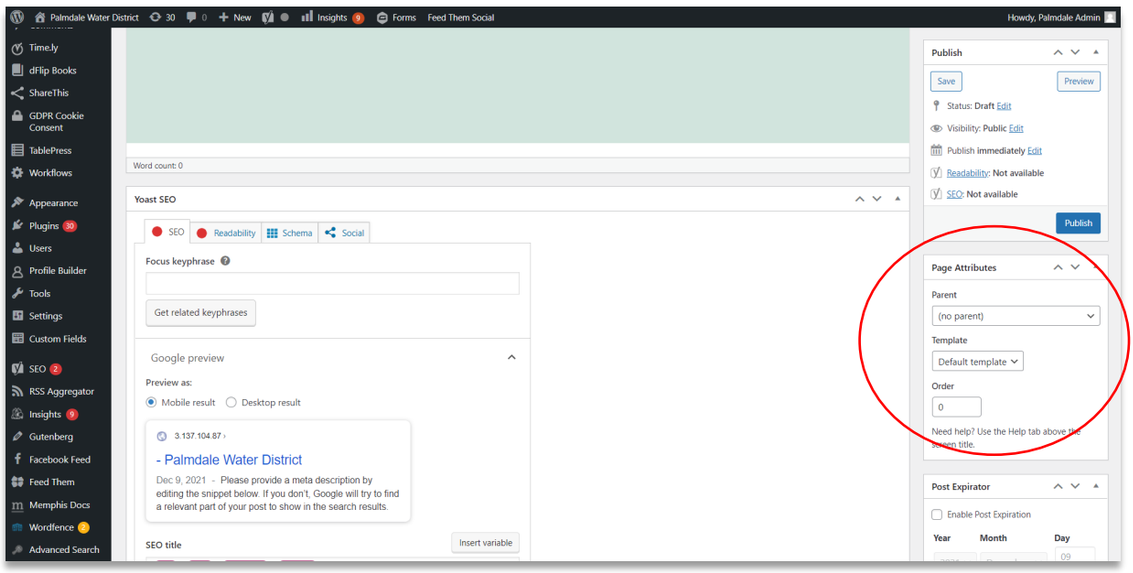
2. Click on the ‘Add New’ button available at the top of the loaded page.



3. The following page will be displayed. You can add your page title where your cursor is pointed with placeholder text “Add title”. For our example we’re creating a Training Manual page.



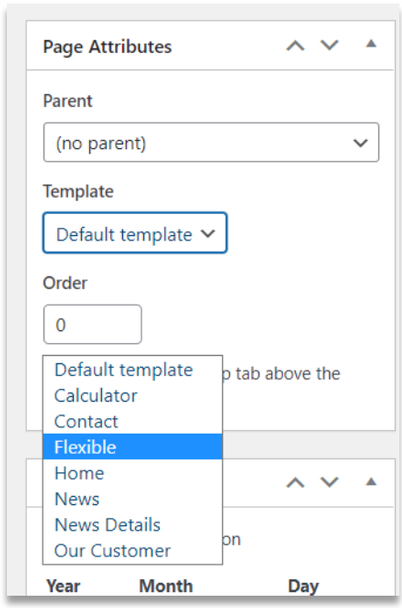
4. Scroll down until you find the “Page Attributes” section on the right-hand side of the window.
Page Attributes



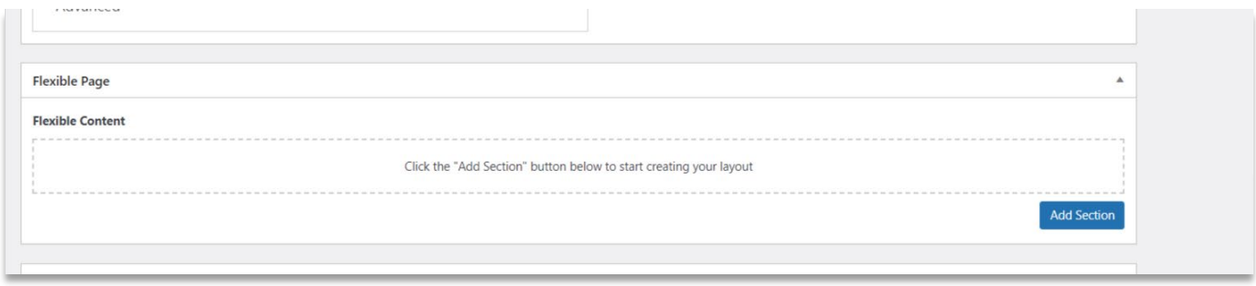
5. From this “Page Attributes” section, select the “Template” dropdown and choose your desired page template. In our example, we’re selecting the “Flexible” option.

   Note that by selecting a template option, the necessary Advanced Custom Fields (ACF) are populated and then can be filled out before the page is published.

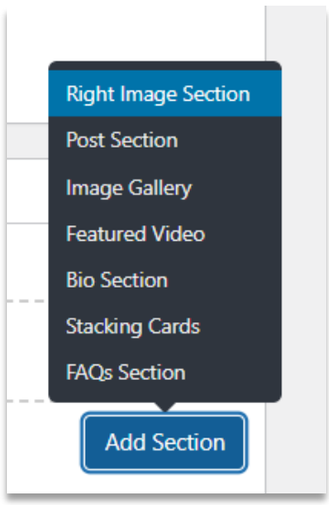
Various useable templates are listed when clicking the dropdown



6. Scroll further down the page builder until you find the “Flexible Page” ACF fields as shown below.

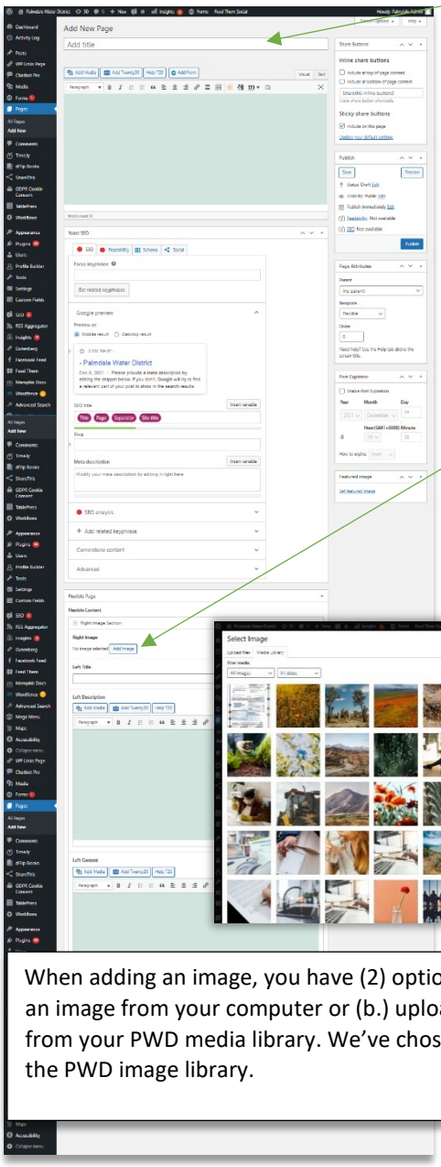


7. Click on the “Add Section” button on the bottom right of the section and choose your desired option from the list as displayed below. In this example, we’re selecting “Right Image Section”. By selecting this option, you are creating a new page section (Right Image Section) on the flexible page template. We’re adding an image to the sight side of the page on this template. We could have chosen and continue to choose additional sections by adding additional sections.

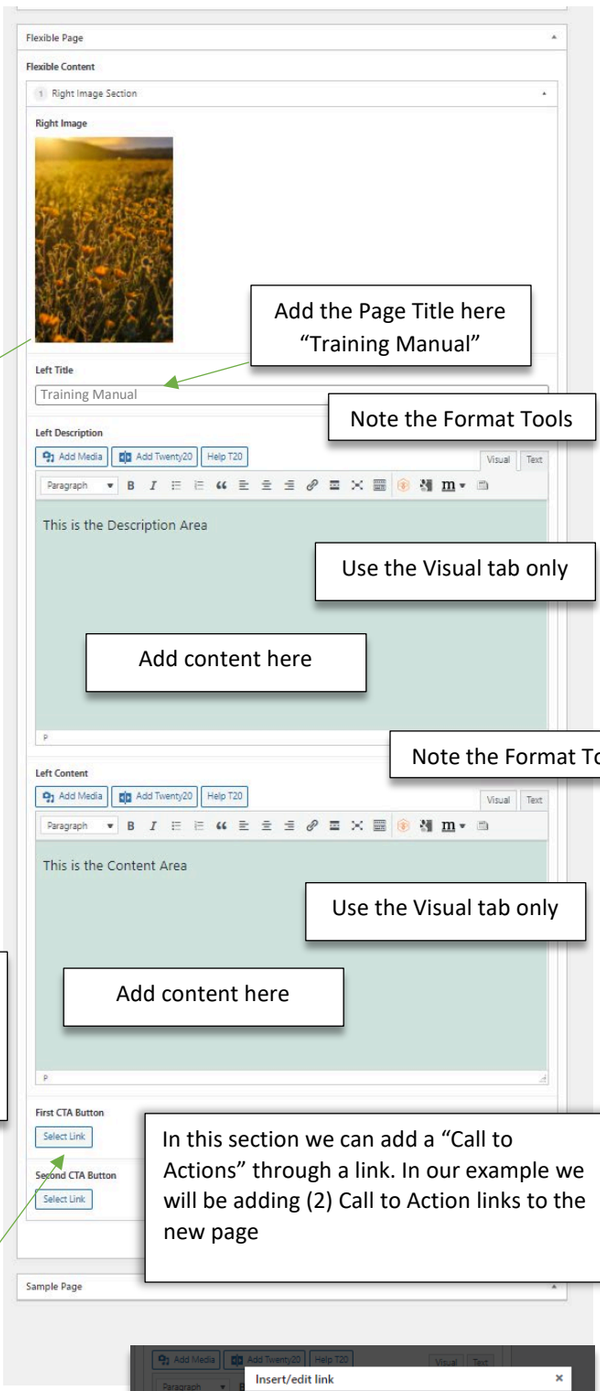


8. Fill out all your desired fields from this section in order to review and publish the new page. An example of the filled-out fields is shown in the below images.

We're going to name our new page "Training Manual" – enter in this location.



When adding an image, you have (2) options, (a.) uploading an image from your computer or (b.) uploading an image from your PWD media library. We've chosen an image from the PWD image library.



Add the Page Title here "Training Manual"

Note the Format Tools

Use the Visual tab only

Add content here

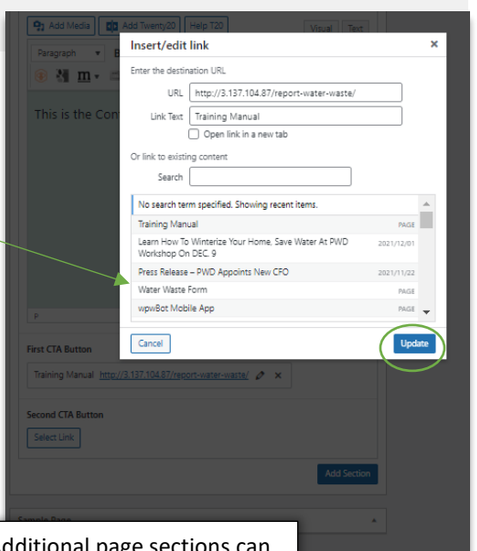
Note the Format Tools

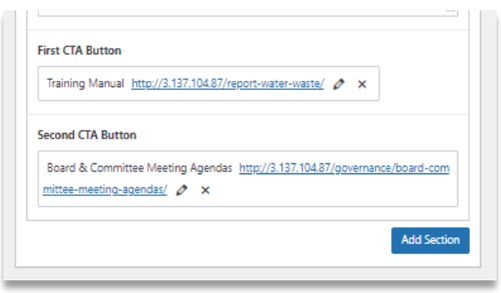
Use the Visual tab only

Add content here

In this section we can add a "Call to Actions" through a link. In our example we will be adding (2) Call to Action links to the new page

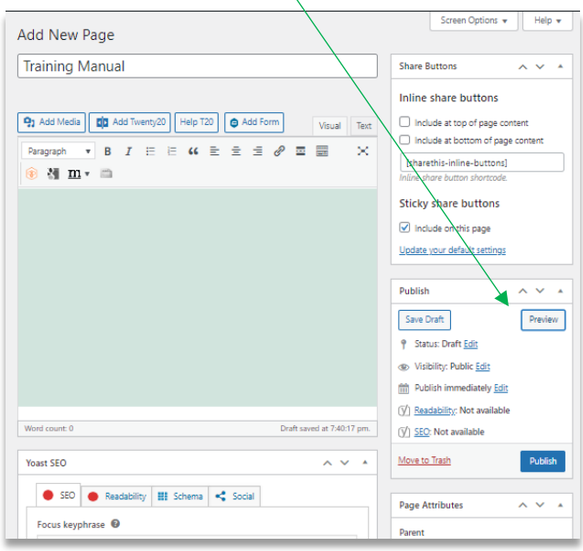
Step 1. "Select Link" under the first CTA Button and either type in your URL to be linked to the page or select from the list of links to existing content. Click "Add Link (or Update if updating the link)"
Step 2. Repeat the same process to add a second CTA Button. We've added a link to Board and Committee Meeting Agenda



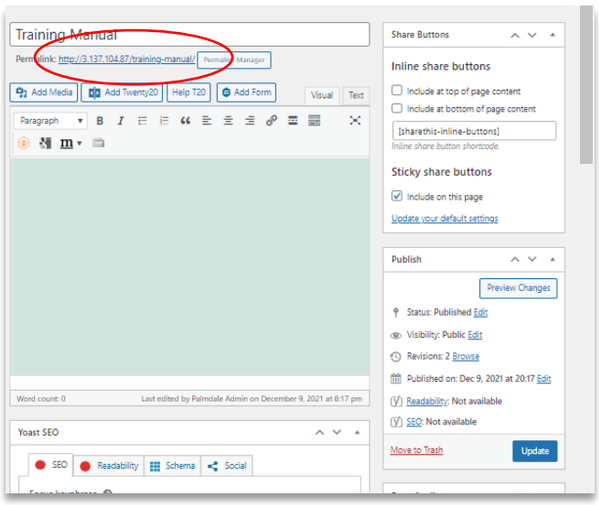


Additional page sections can be added to your page from here

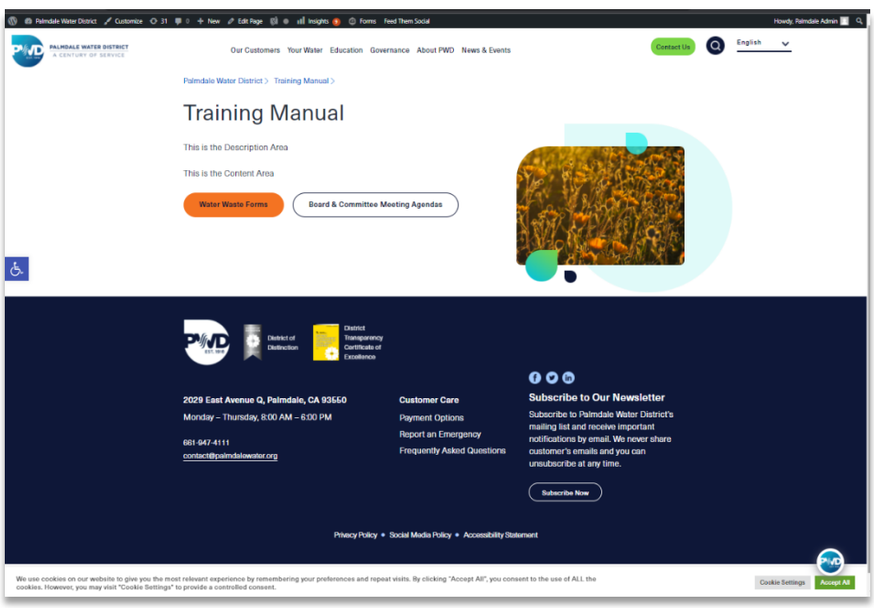
9. Once all of the new page content, links and images are added, you can preview your new page by clicking the Preview button in the **Publish** section hit in the right side edit section. We always recommend that you Preview a new or updated existing page prior to Publishing it to your site. After hitting the Preview – your new page will be displayed. You can either continue with further edits or if its ready to go – hit the Publish button



10. You're all set, your new page "Training Manual" is available to be viewed at this location.

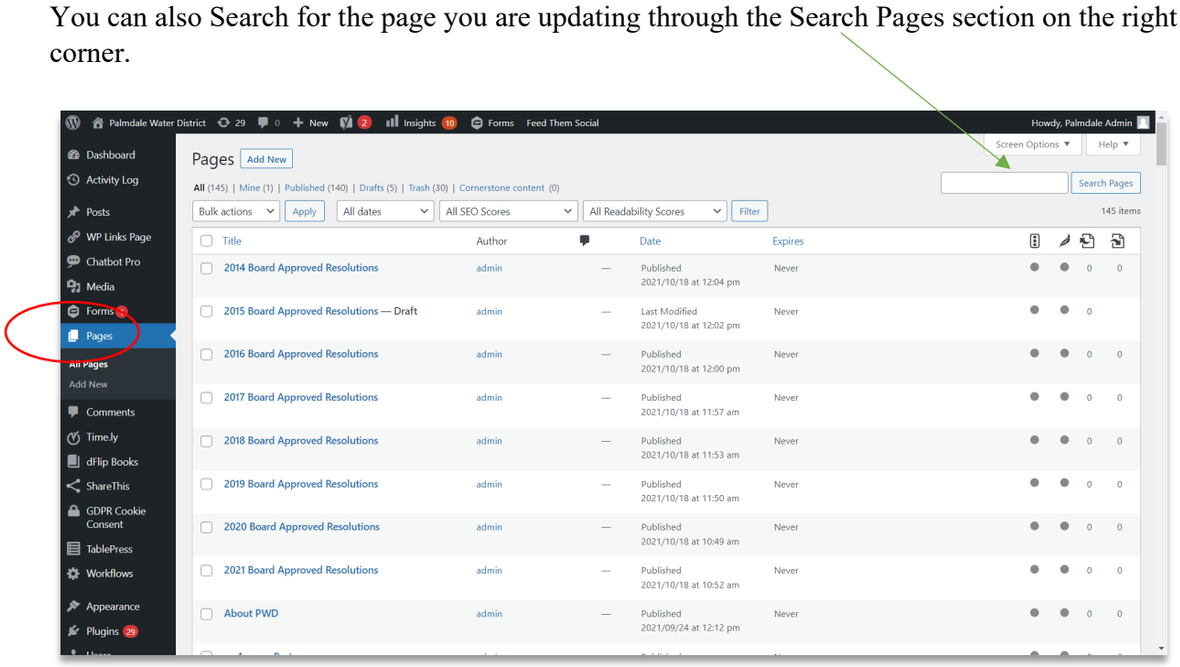


11. The final page is shown below.

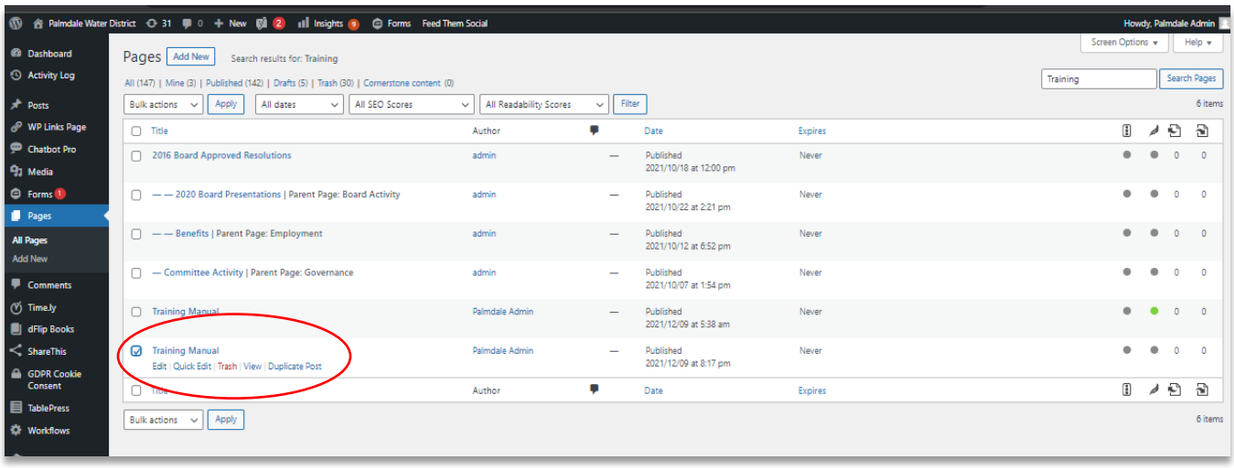


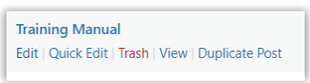
Editing a page

1. On the admin page, click on the ‘Pages’ option present in the left sidebar.
   You have a series of options on the top of this screen:
   View all 147 pages, view Mine (3), view Published (142) view Drafts (5) View Trash (30) and Cornerstone Content (your key pages that you mark). These numbers will change as pages are added or removed.
   You can also Search for the page you are updating through the Search Pages section on the right corner.



2. Navigate to the page you want to edit/update from the list. In our example, we want to edit the “Training Manual” page, so we’ll be using the Search Pages bar to find the page we want. Once found click the “Edit” button.

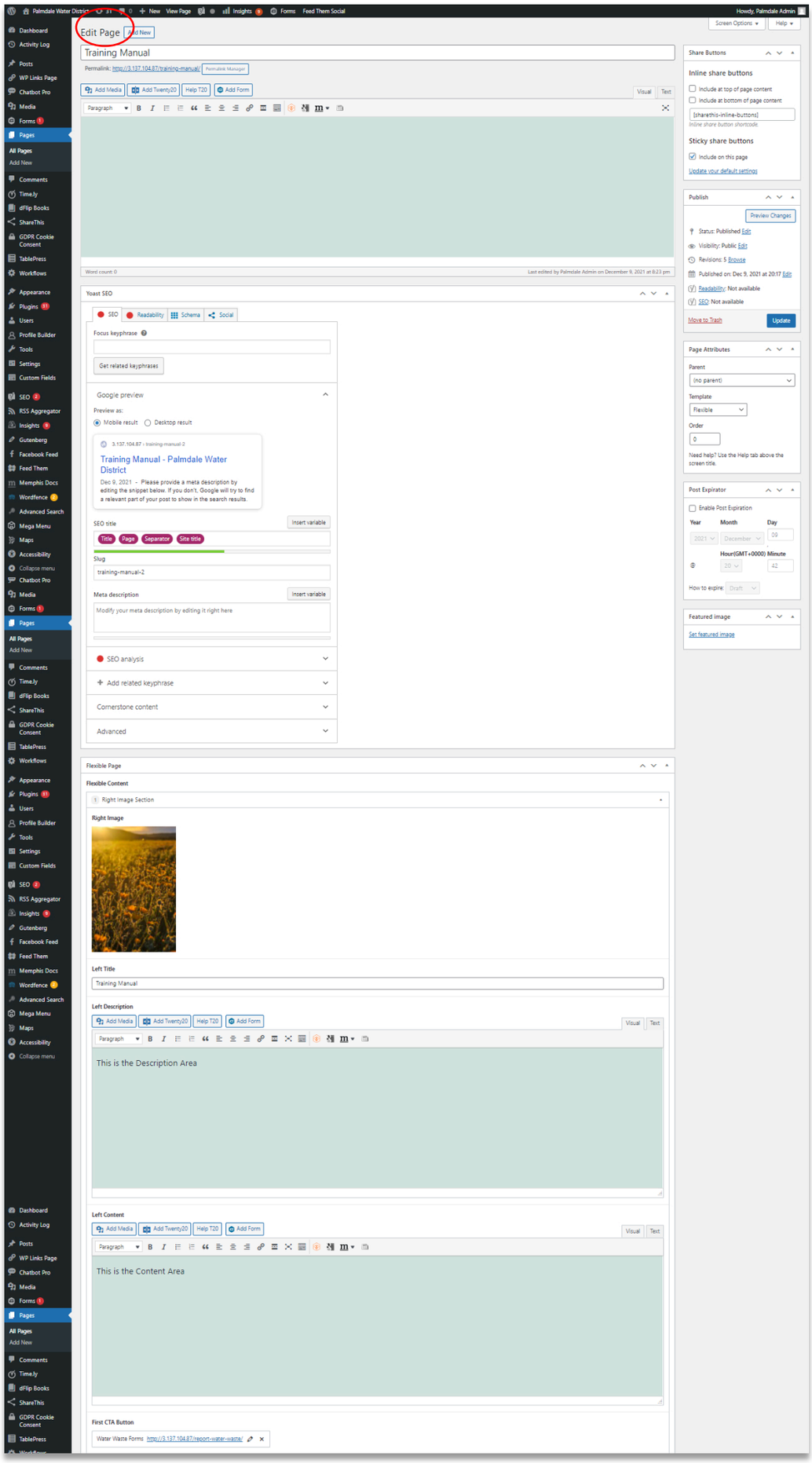




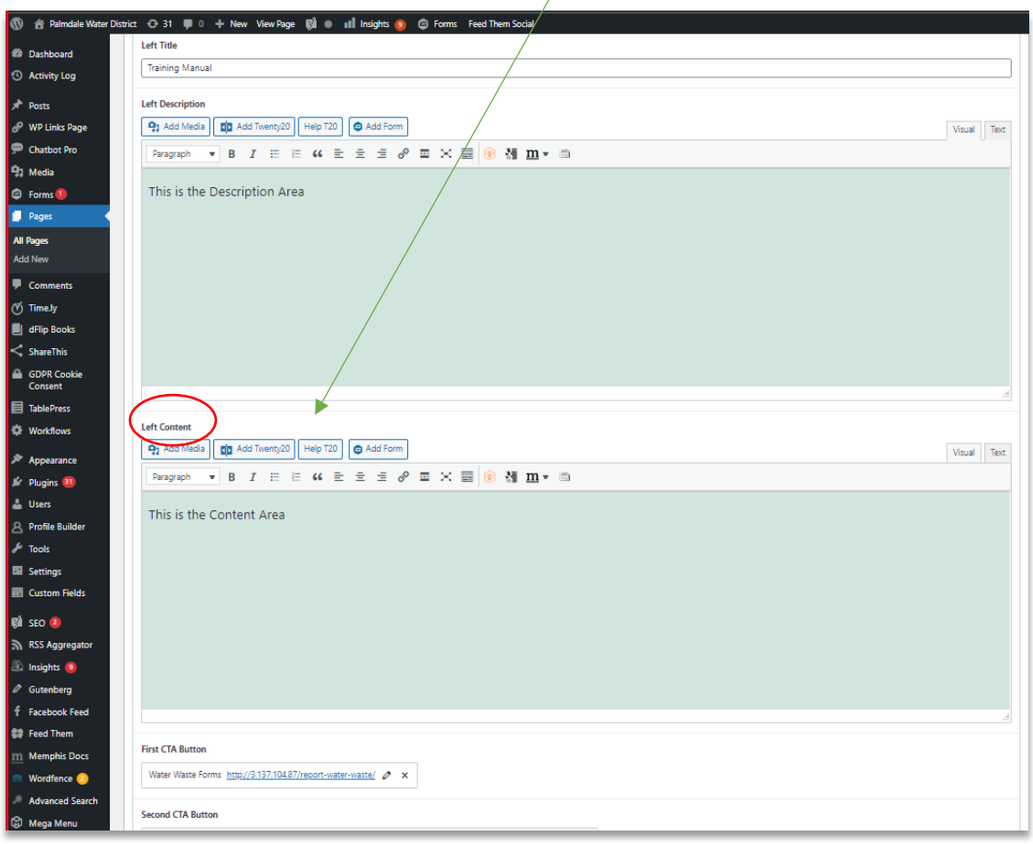
Your available options are :

- Edit
- Quick Edit
- Trash
- View
- Duplicate Post

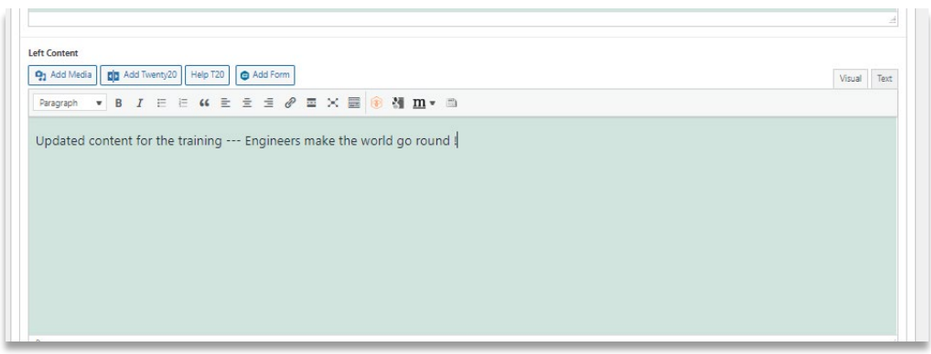
3. After clicking Edit, the Training Manual edit page (the same page you just created is displayed in the page edit mode) will be opened.



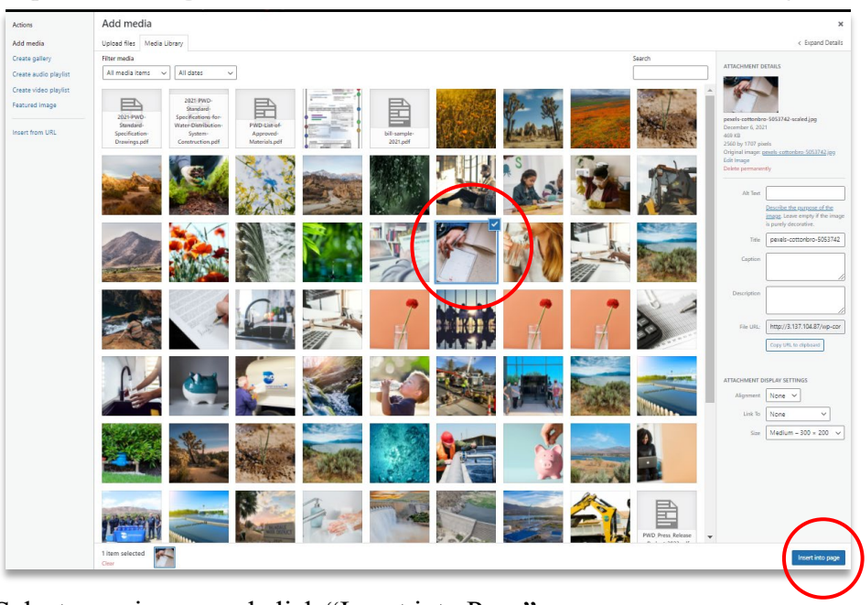
4. Scroll to the section where you want to make edits. In this example, the content in the "Left Content" will be modified. We're going to update with new copy content and add an image from the PWD Media Library. There are additional options such as adding a media file and adding a gravity form.



Step 1. Change the content "Updated content for the training --- Engineers make the world go round !"

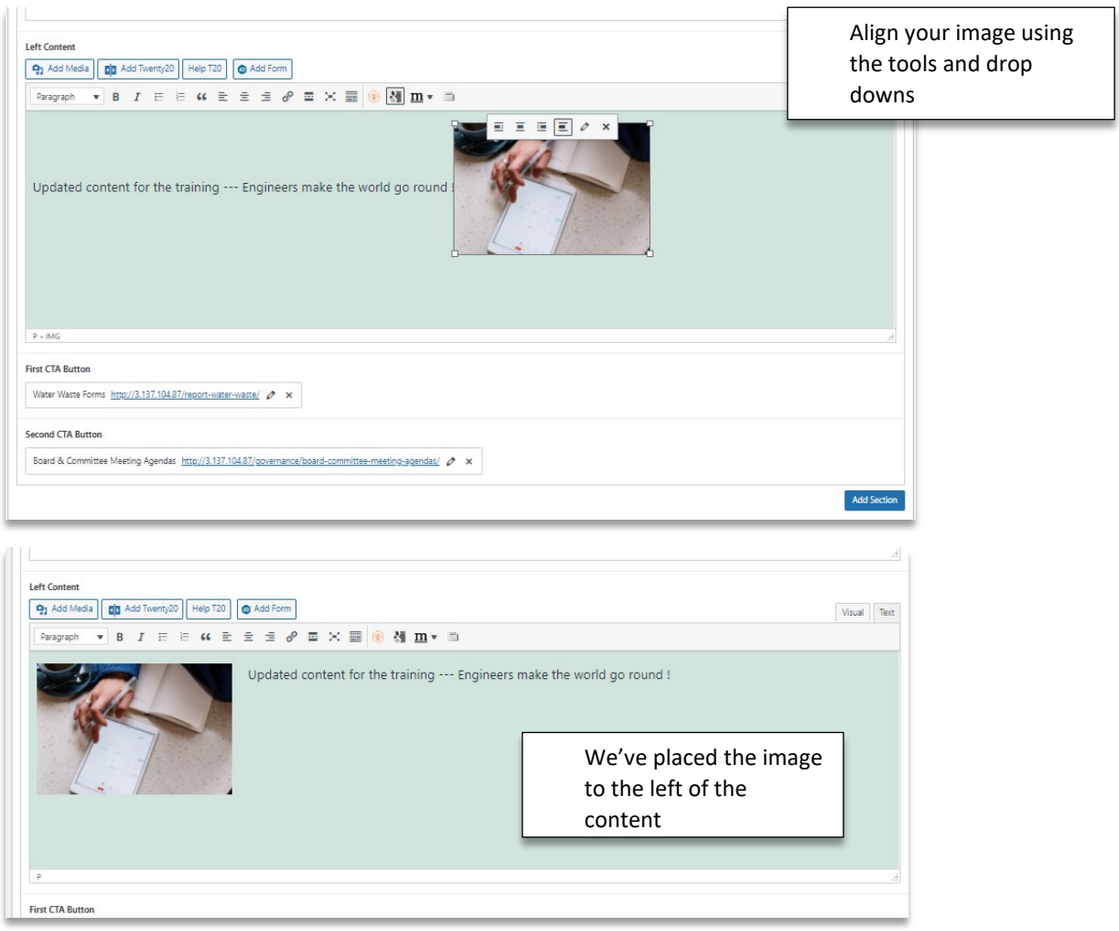


Step add an image: click on Add Media and the PWD Media Library is displayed.

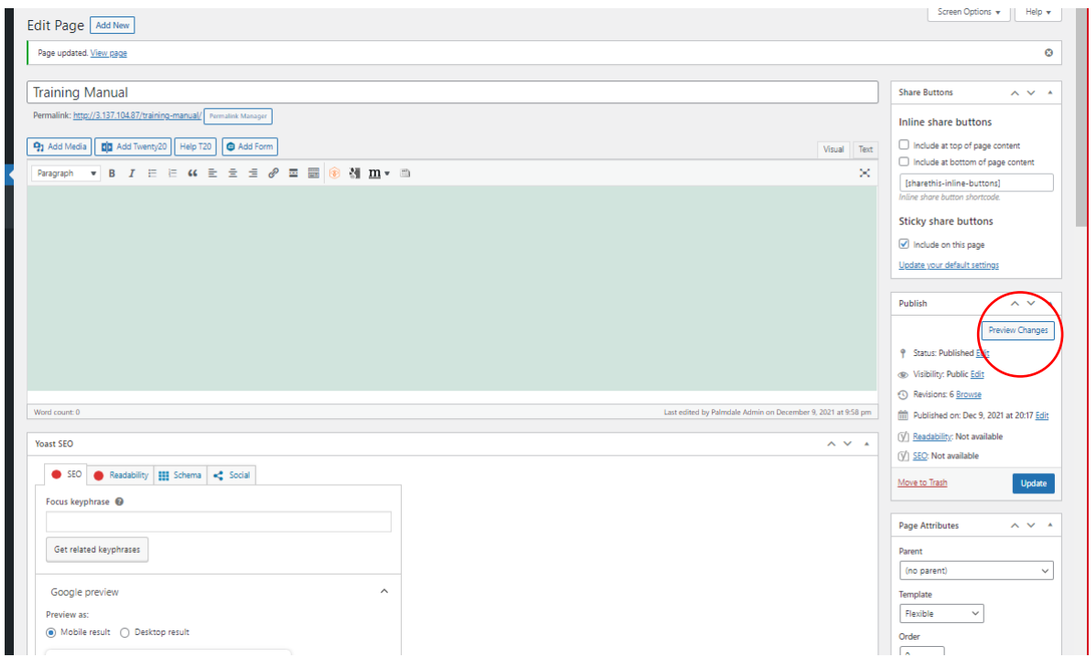


Select your image and click "Insert into Page".

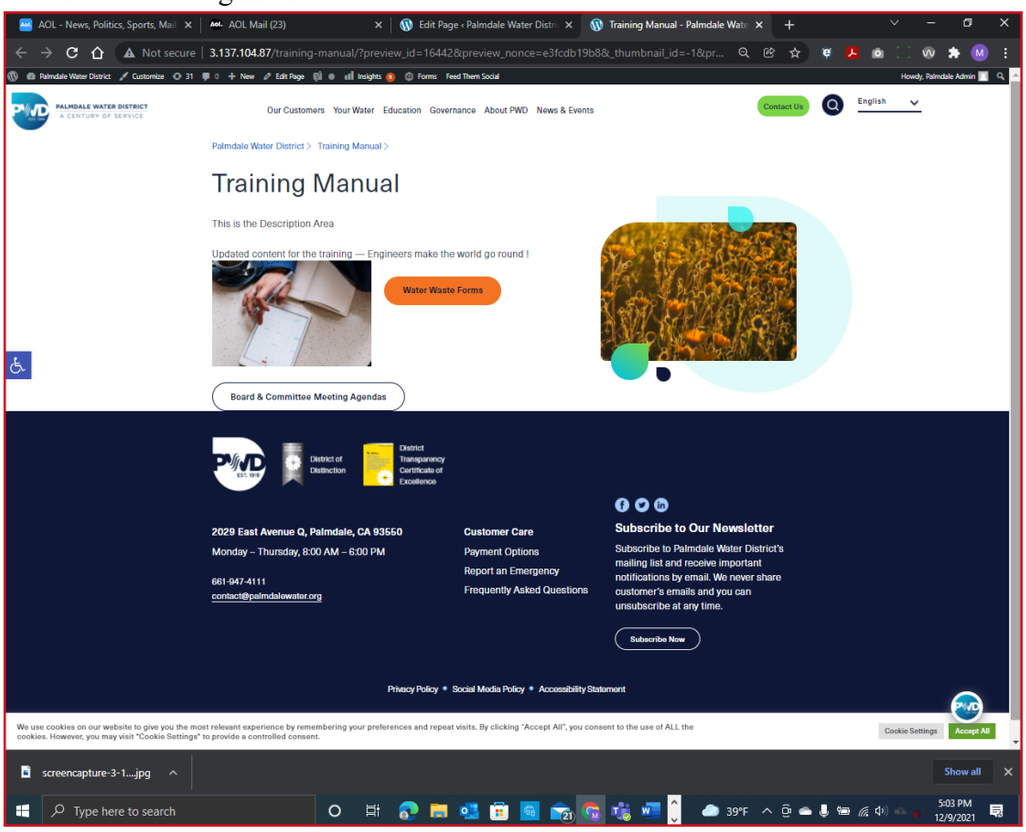
5. The image needs to be aligned with your updated content



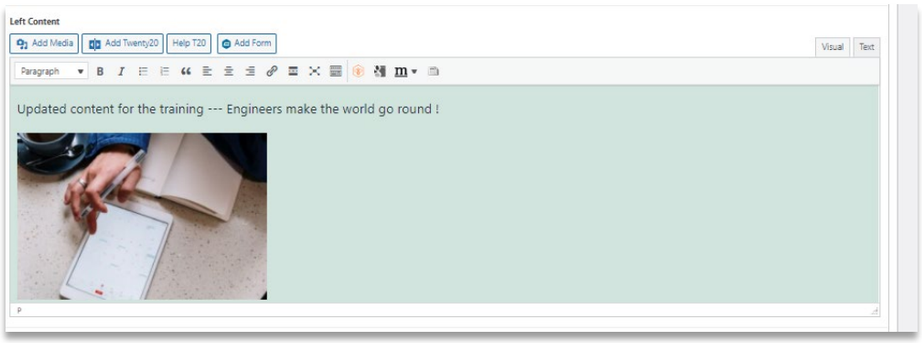
6. Now it's time to Preview your updates prior to publishing them
At the top of the Edit Page screen hit "Preview Change"



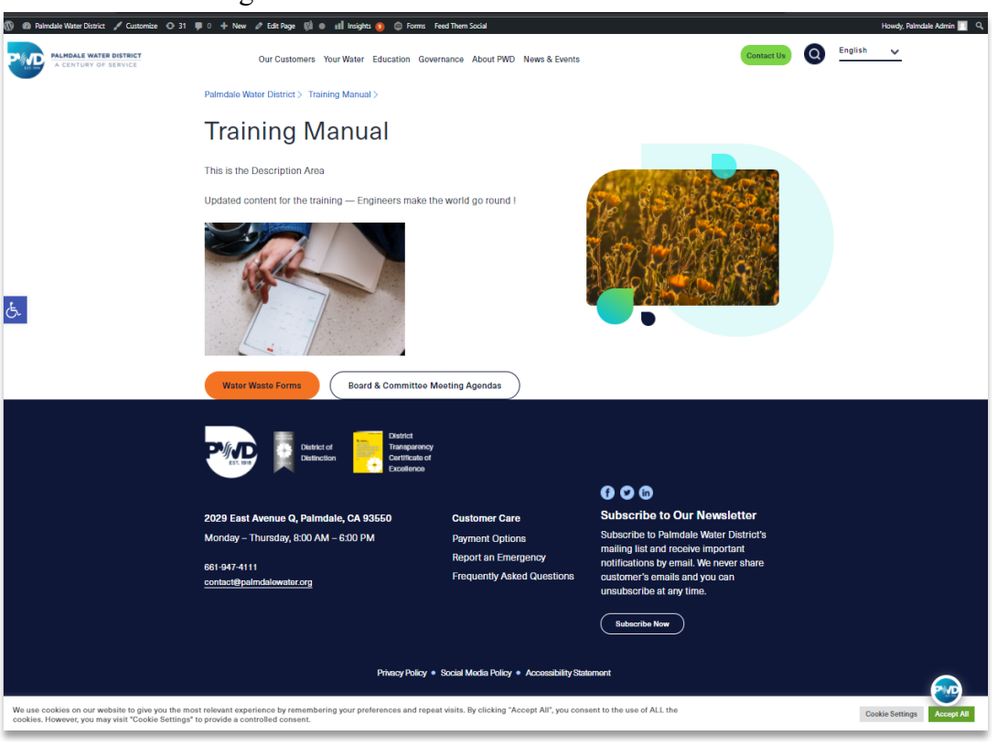
7. In looking at the Preview – the new image and content has been added but the first CTA button is out of alignment.



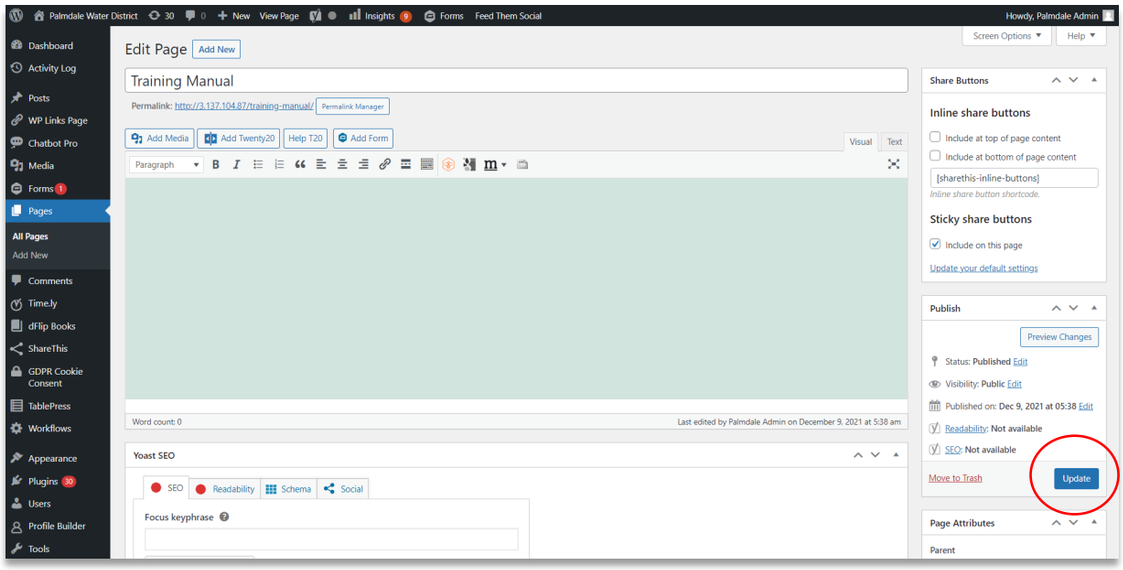
8. To fix the CTA button alignment, in the Content Section in the Page Editor , place the image under the content and resize your image (larger) to fill the entire content space left open.



Click Preview Changes:



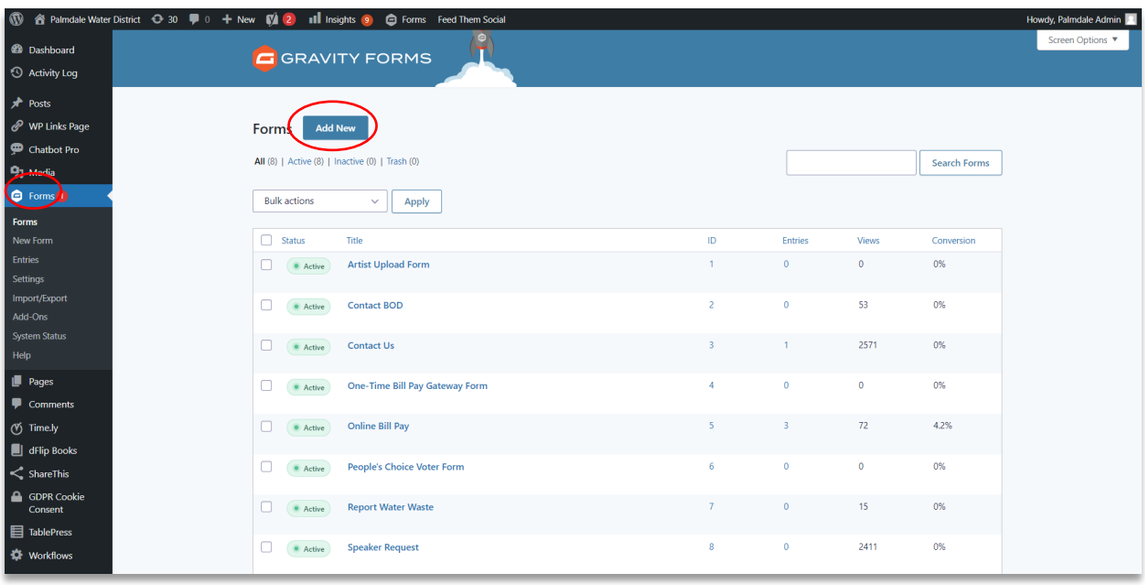
9. If the updated corrections and changes are “good to go” - scroll to the top of the page builder and click the “Update” button highlighted in red below.



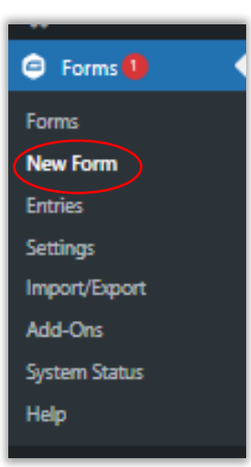
You’re all set!

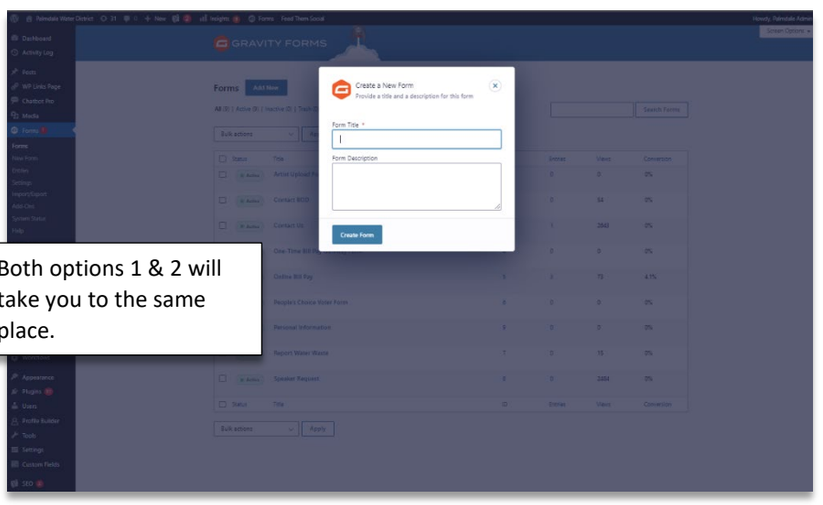
Creating a New Form

1. You have (2) startup options in creating a new form.
   Option 1. On the main admin page, click on the “Forms” tab in the left sidebar and click on “Add New” button.



Option 2. When you click on the “Forms” tab you’re given a series of options to choose from, highlight and click on the “New Form”.



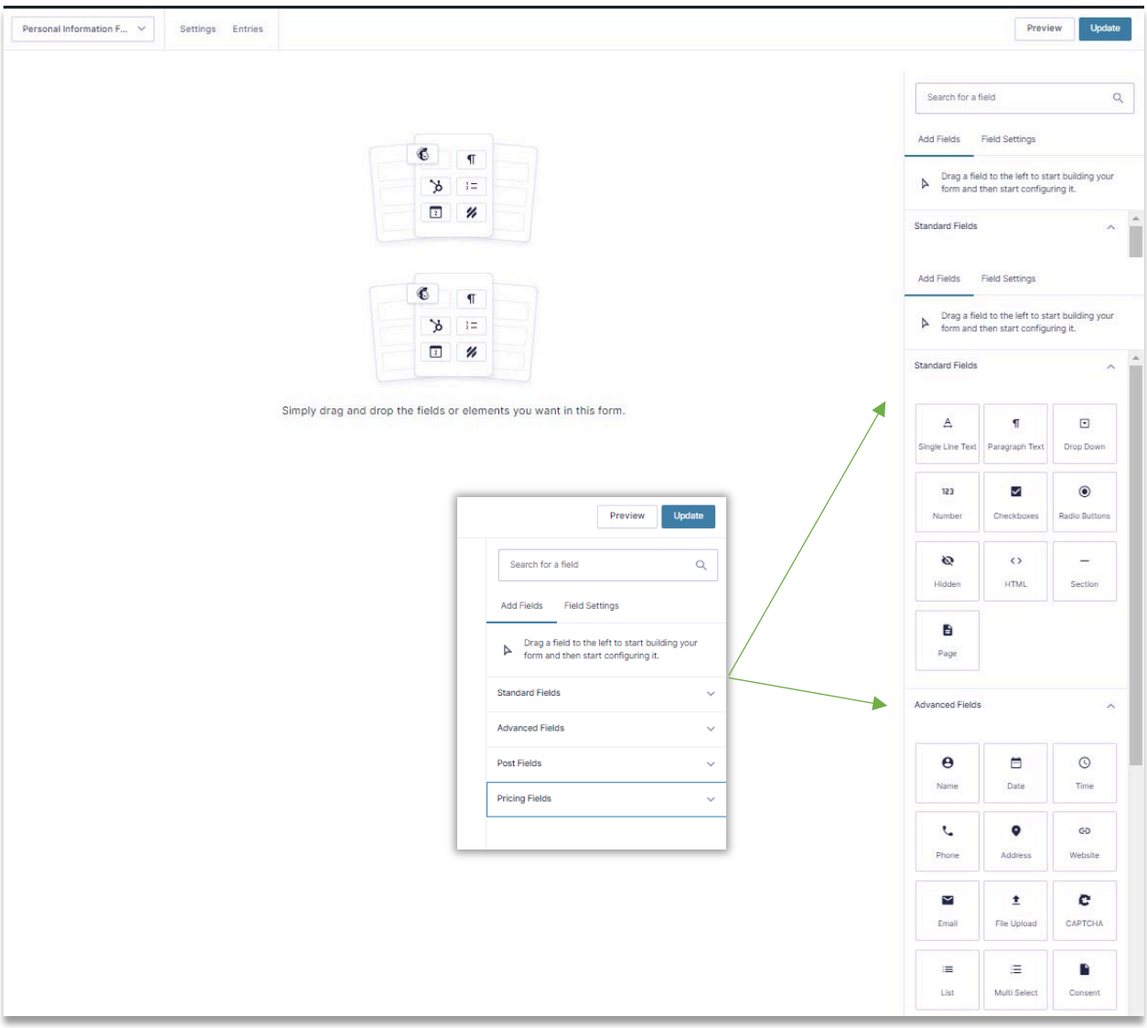


Both options 1 & 2 will take you to the same place.

2. Type your new form name (in the Form Title) and description (Form Description) . In our example we're going to call the form Personal Information Form #2 and describe the form as " This form captures personal information". Next click on "Create Form".

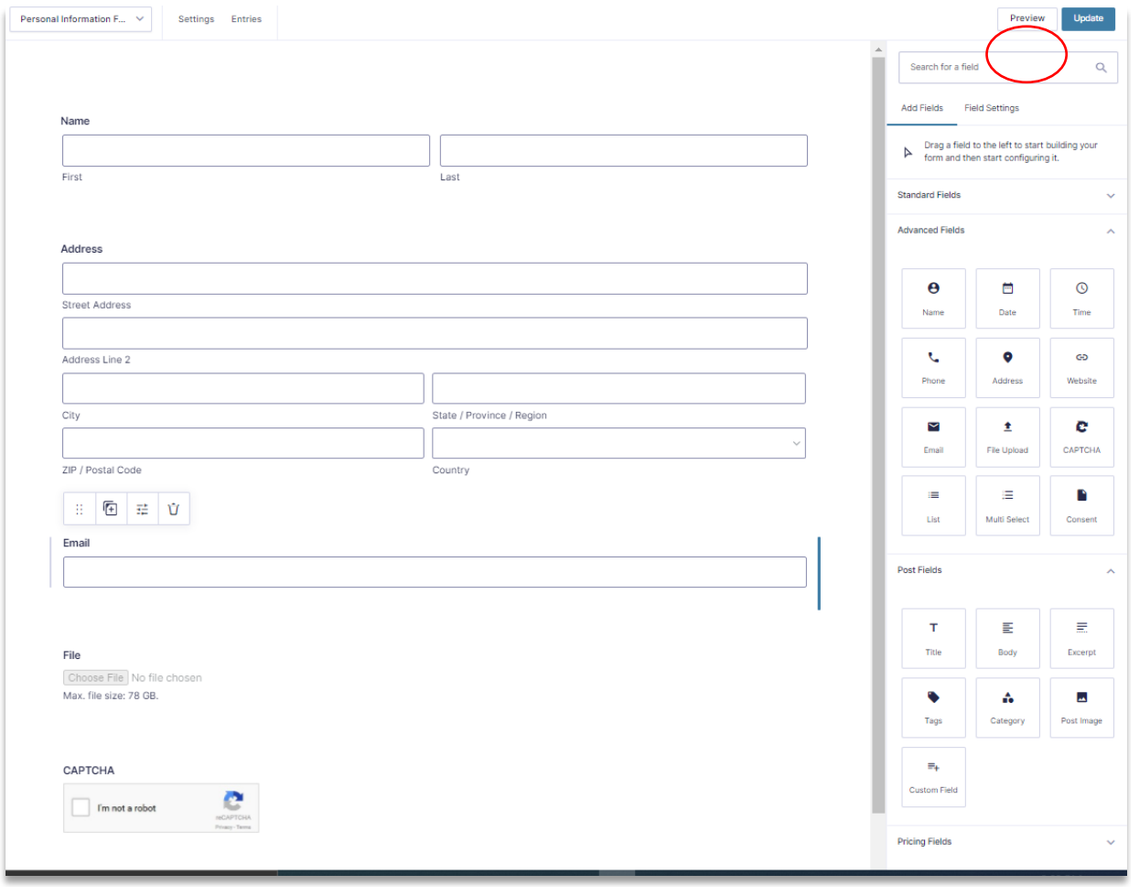


3. On the following new screen you have a series of form options to choose from:

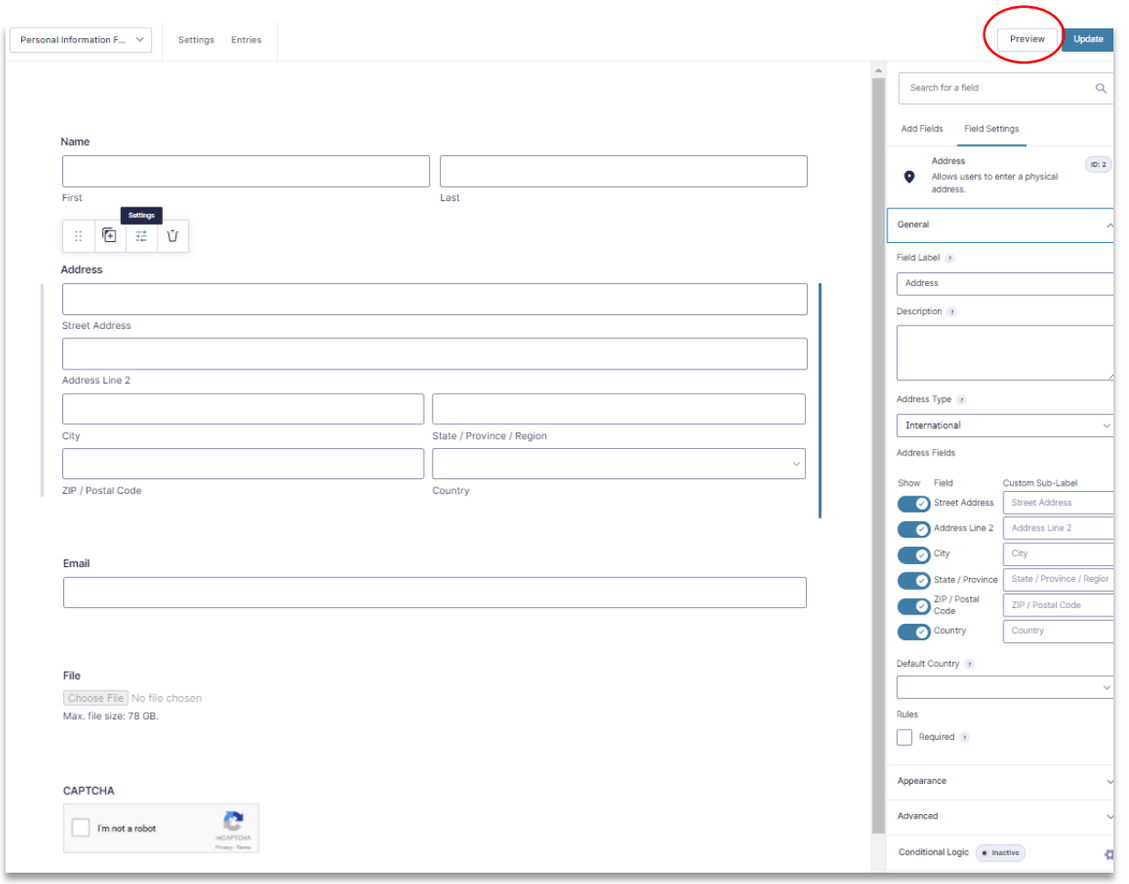


Using the elements from the options fields, drag you desired elements from the right pane to the left area and name the fields as per your need.

4. In our example, we chosen Name, Address, Email, File Upload, and the CAPTCHA fields as shown below.

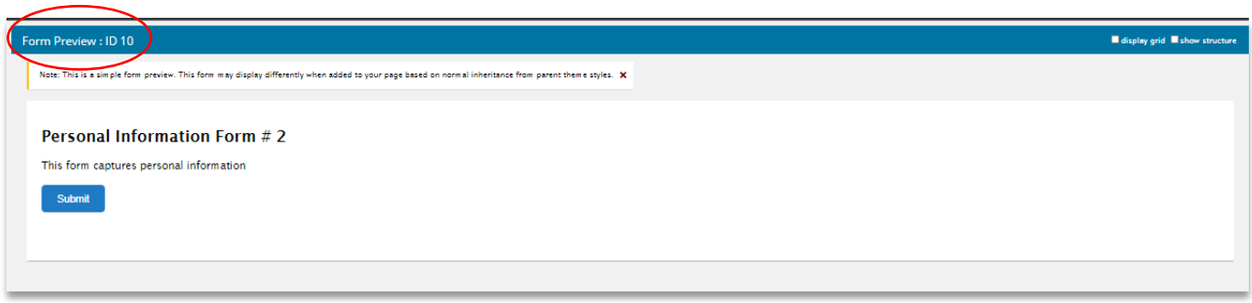


As you are creating your form you can modify field by hovering over the field name.
An options box pops up: your options are to move the entry, duplicate the field, settings (the field settings pop up on the right side to adjust), and delete the field.

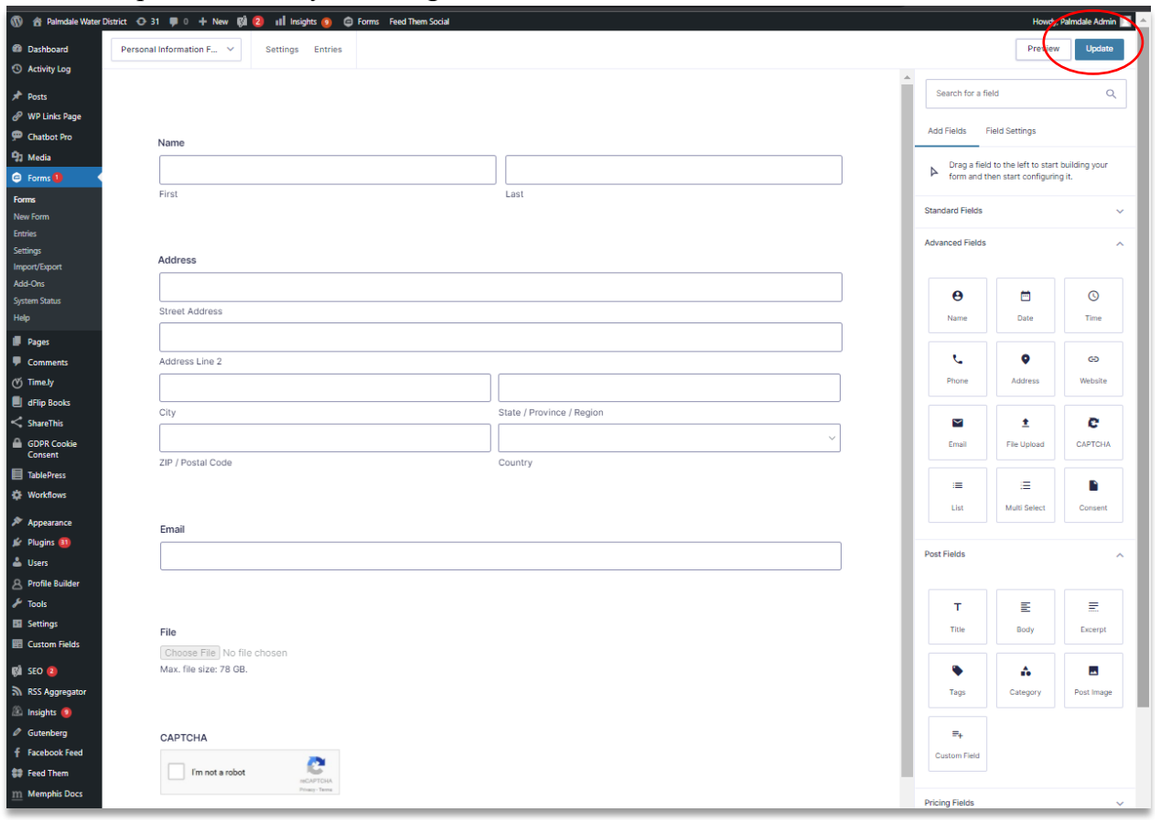


Once you're satisfied with your new form, click Preview to preview your new form.

5. You will see a similar screen as shown below. Note down the ID number from the top and go back to the previous screen.



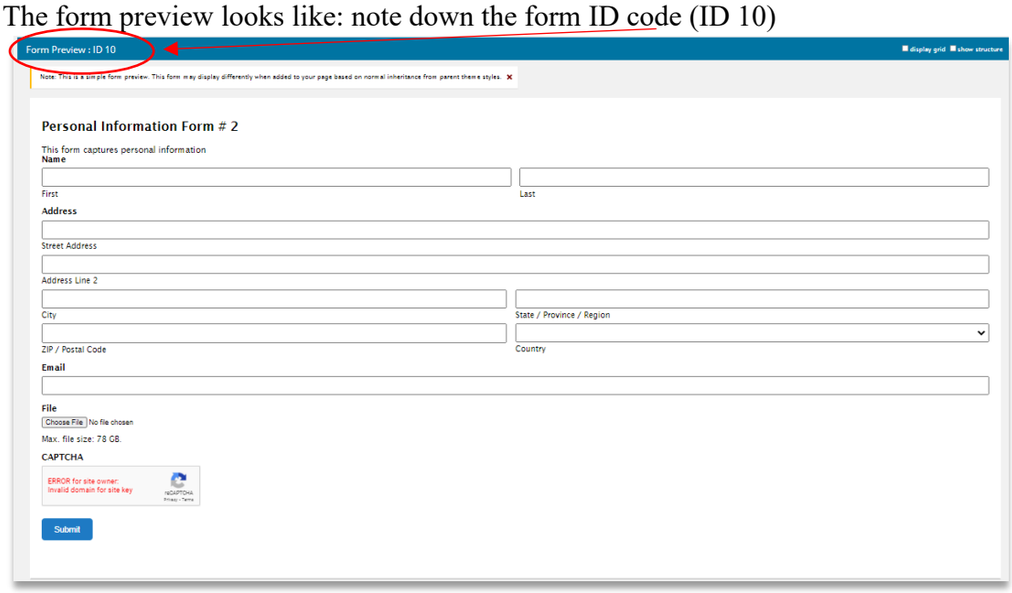
6. Click on "Update" to save your changes.



After you click Update you are notified on the bottom of the screen that the form has been updated and you have the option to view your form.

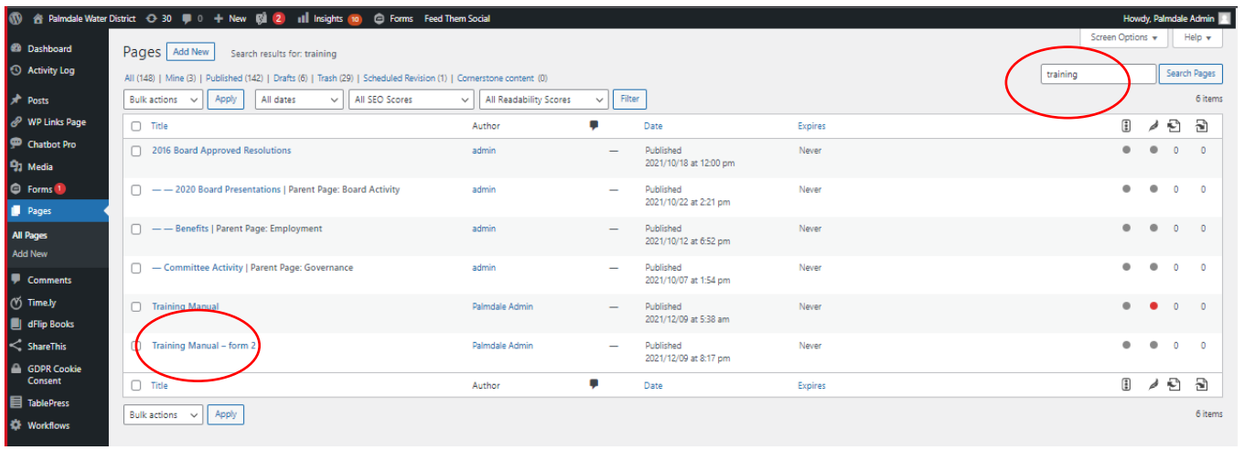


The form preview looks like: note down the form ID code (ID 10)

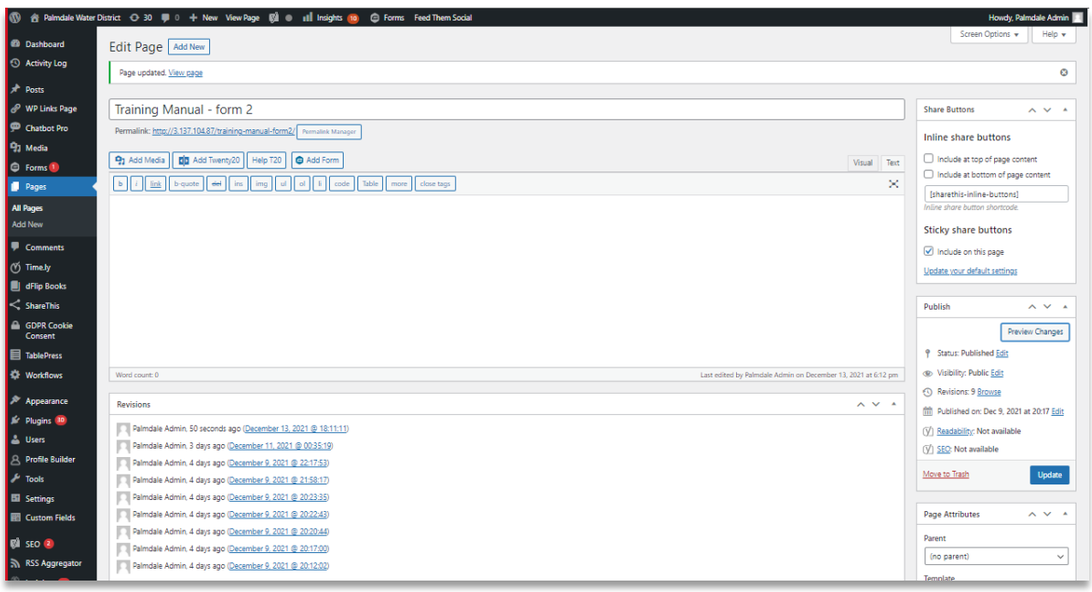


7. Next to use the form on a page you need to go to the page or the post where you want to use your new Personal Information Form #2. In our example, we'll use the same Training Manual Page – Form 2. Visit the page builder where you want to add the form.

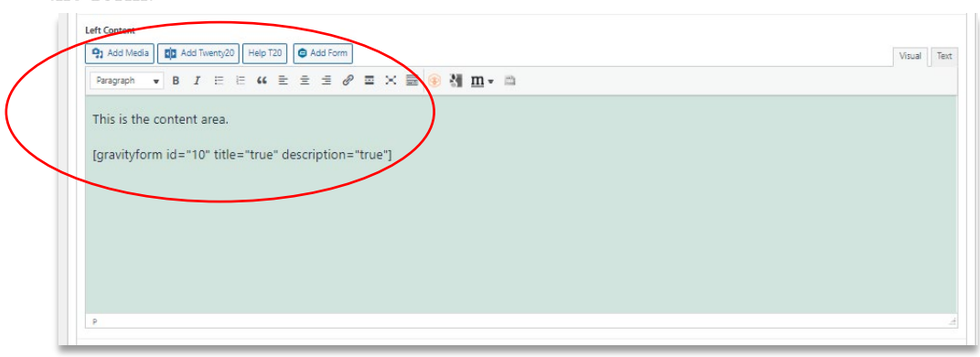
   Go to the Page tab, search for the page name in the Search Bar, once you find the page select the page to Edit and click edit



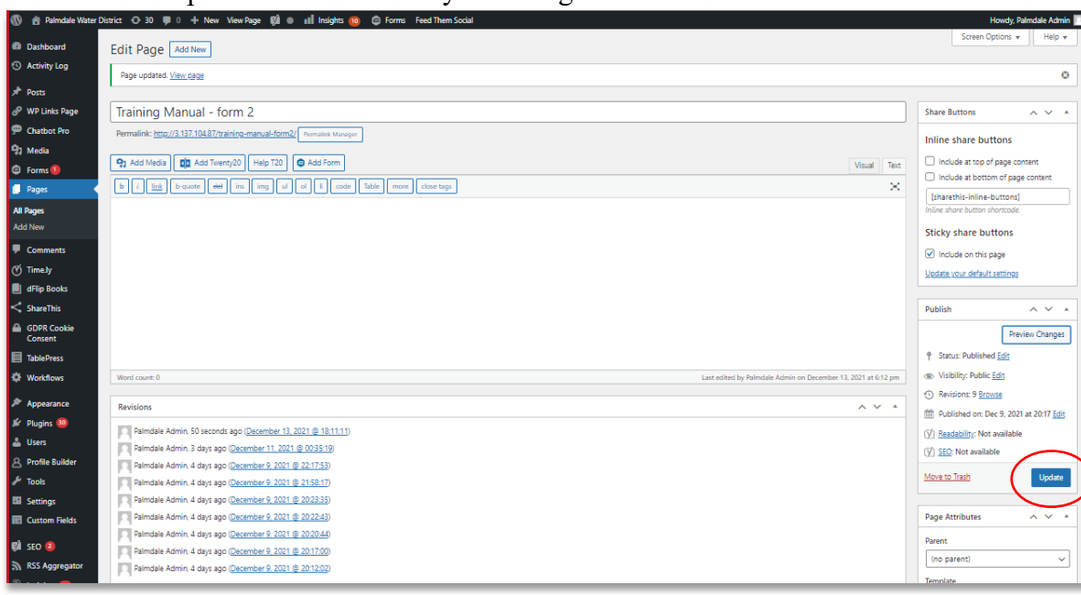
8. Scroll to the field where you want to add the form. For this example, we will be adding the new form "Personal Information Form #2 in the **Left Content Section.** Scroll down to that section to add your new form.



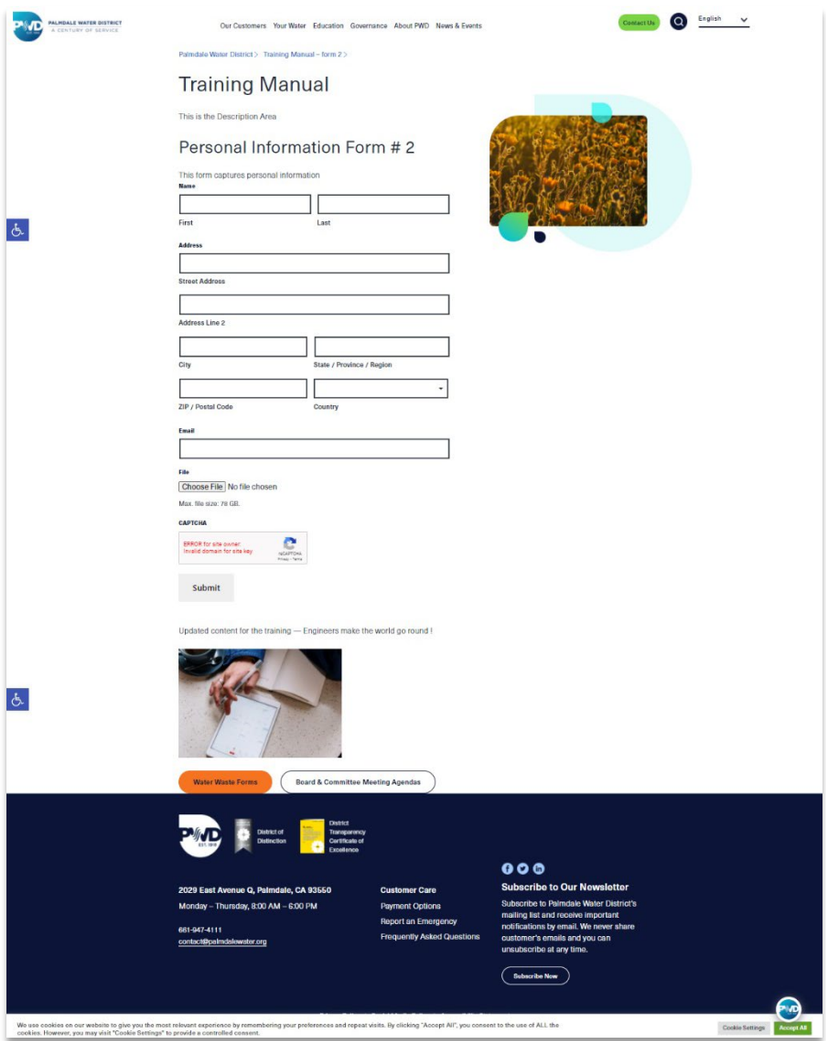
   A shortcode is used to add the form to the section in the format: **[gravityform id="10" title="true" description="true"]** where the number **10** is the ID of the form and optionally true values are set to display the title and description of the form. In our example, the following is where we want to add the form.



9. Click on the “Update” button to save your changes as shown below.

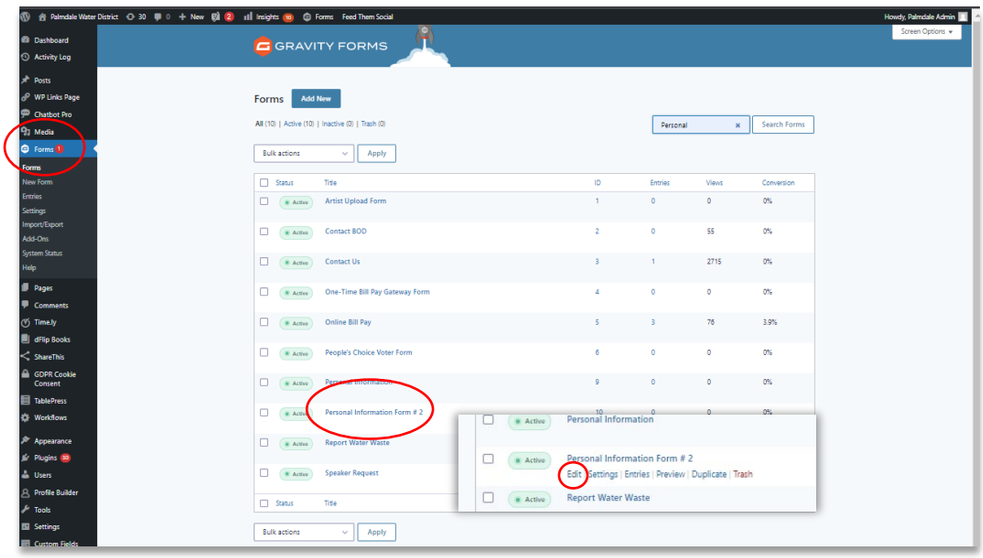


10. To view the page hit Preview Changes , the form will be displayed on the screen like the one shown in the below image.

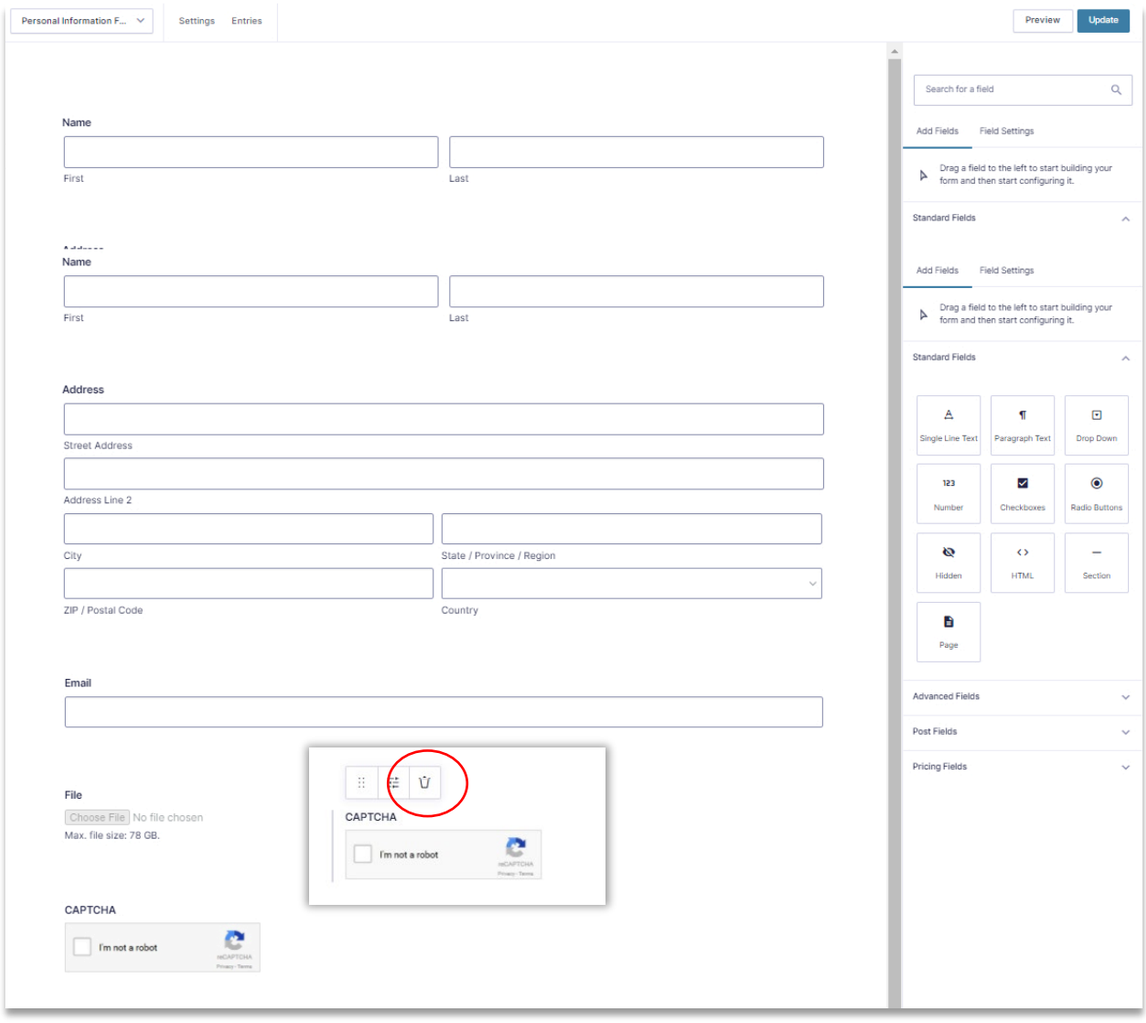


Editing a Form

1. On the admin page, click on the ‘Forms’ option present in the left sidebar and choose the form you want to edit. Use the Search bar to search for a particular form to edit.
   In our example, we’ll be updating the “Personal Information Form # 2”. So, we’ll hover over that form and click on “Edit”.

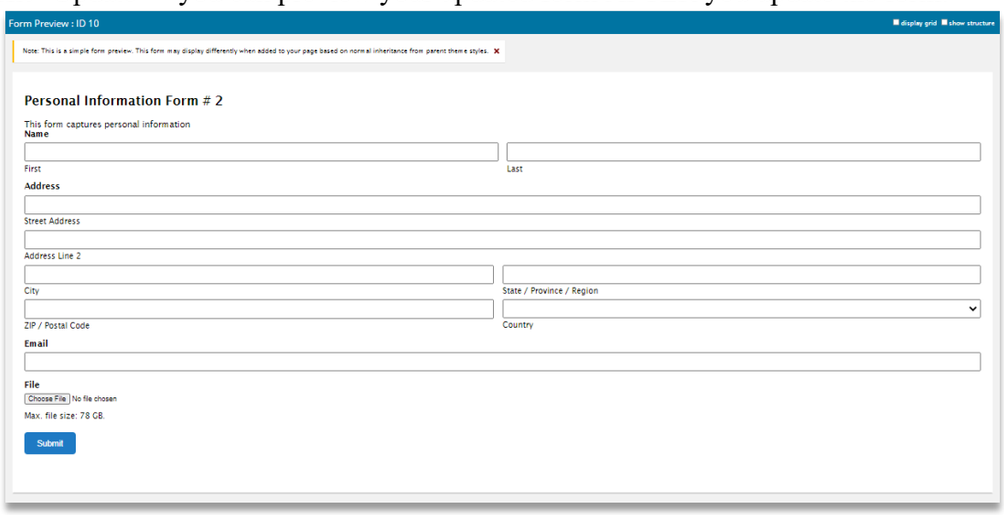


2. The form screen pops up for this example we will be removing the CAPTCHA from the form.



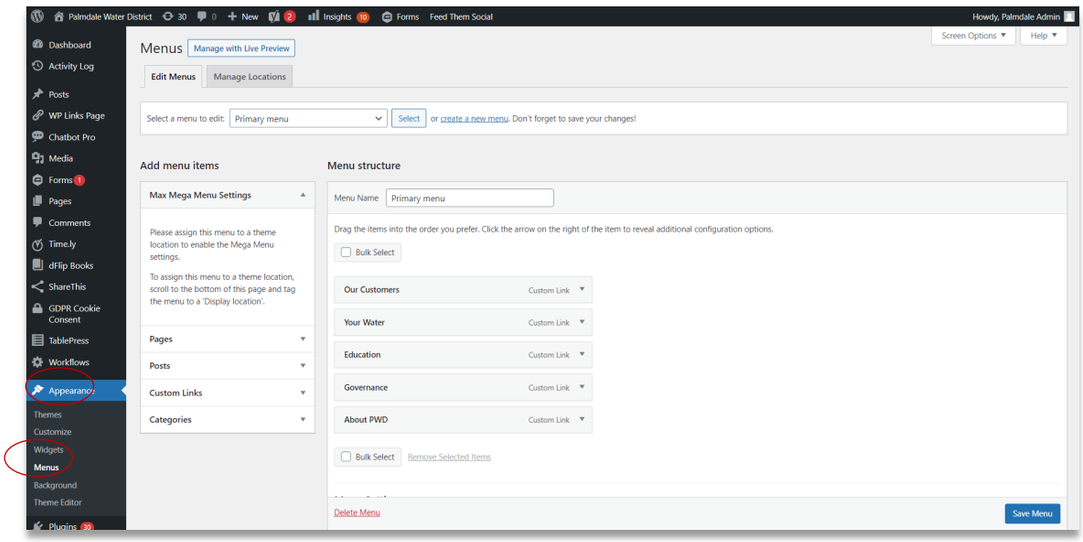
3. Hover over the CAPTCHA and the options box will appear. Click on the trach can icon to remove.

4. Hit “Update” – you can preview your updated form AFTER you update the form.

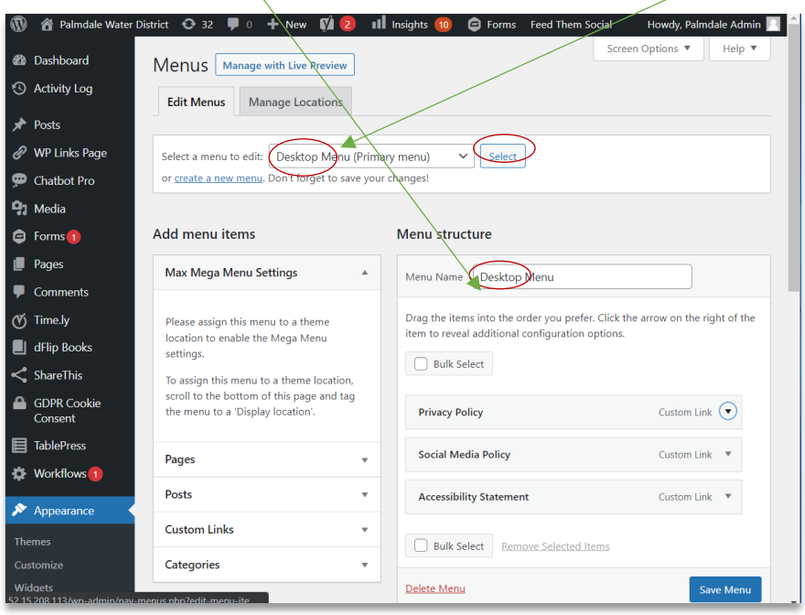


Editing Header Menu

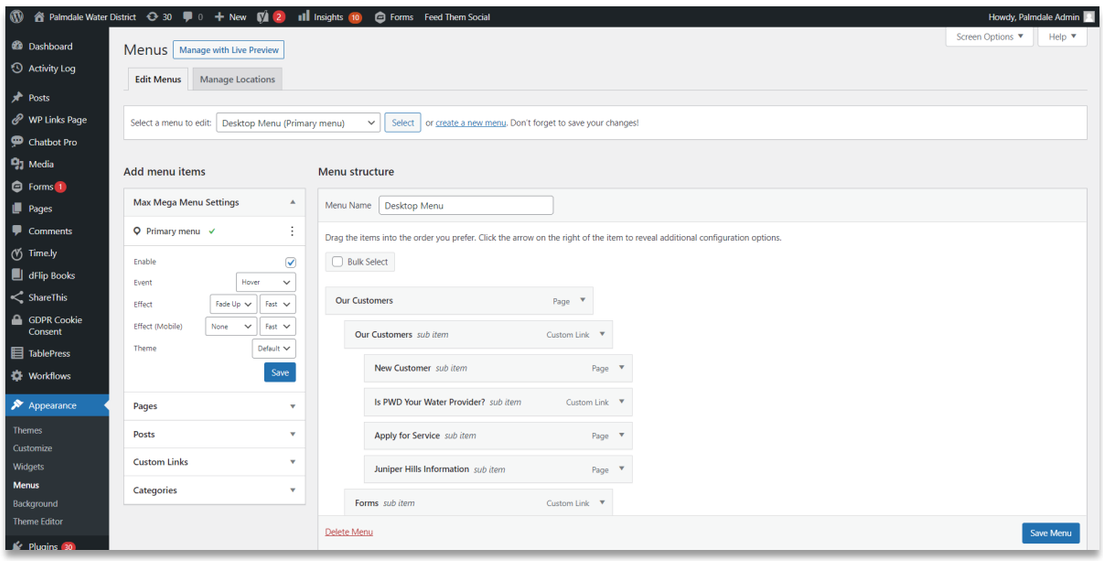
1. First, click on Appearance from the left bar in the admin dashboard and then Menus in the sub section.



2. From the dashboard view of the Menu – make sure “Desktop Menu” is in the Menu Edit and Menu Name Field. You may have to type in the name.
   Next click “Select”

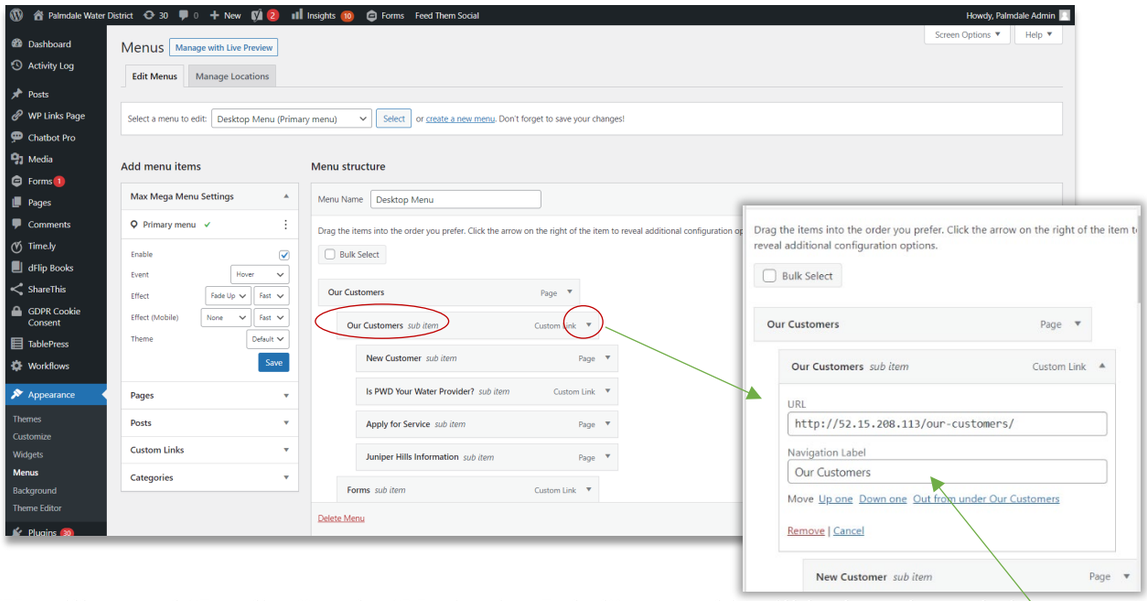


After – the following screen is displayed

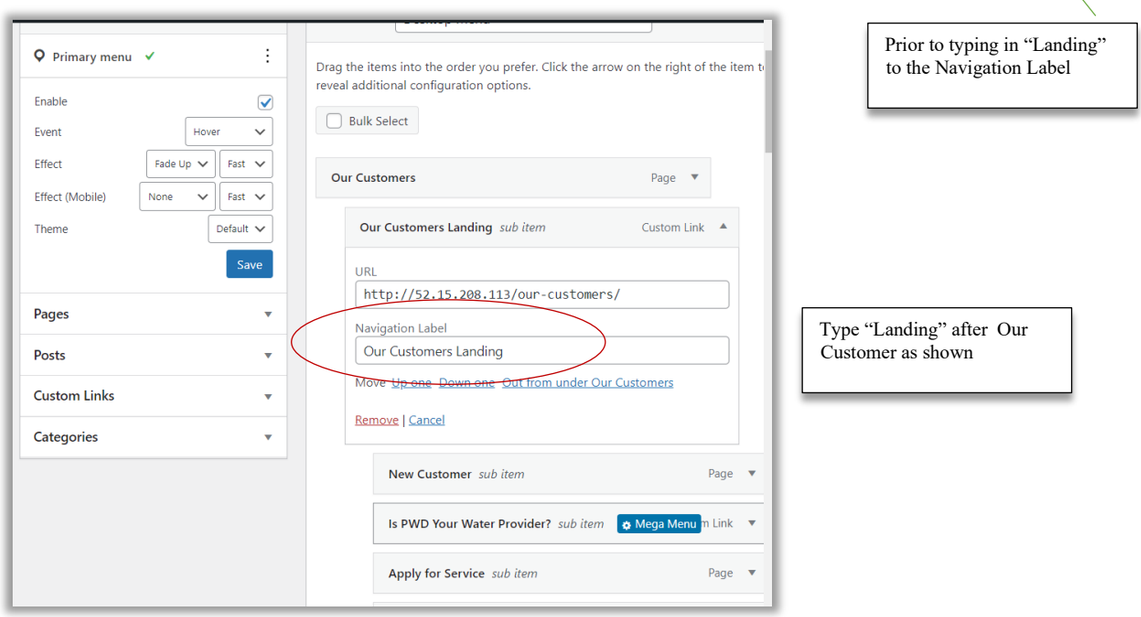


3. All menus are arranged in a hierarchical order and can be updated and / or removed and links (pages, posts, PDFs, etc) can be updated.

4. In this example, we'll update the Our Customers Page to Our Customers Landing Page. We'll click on the down arrow marked below on this block first.



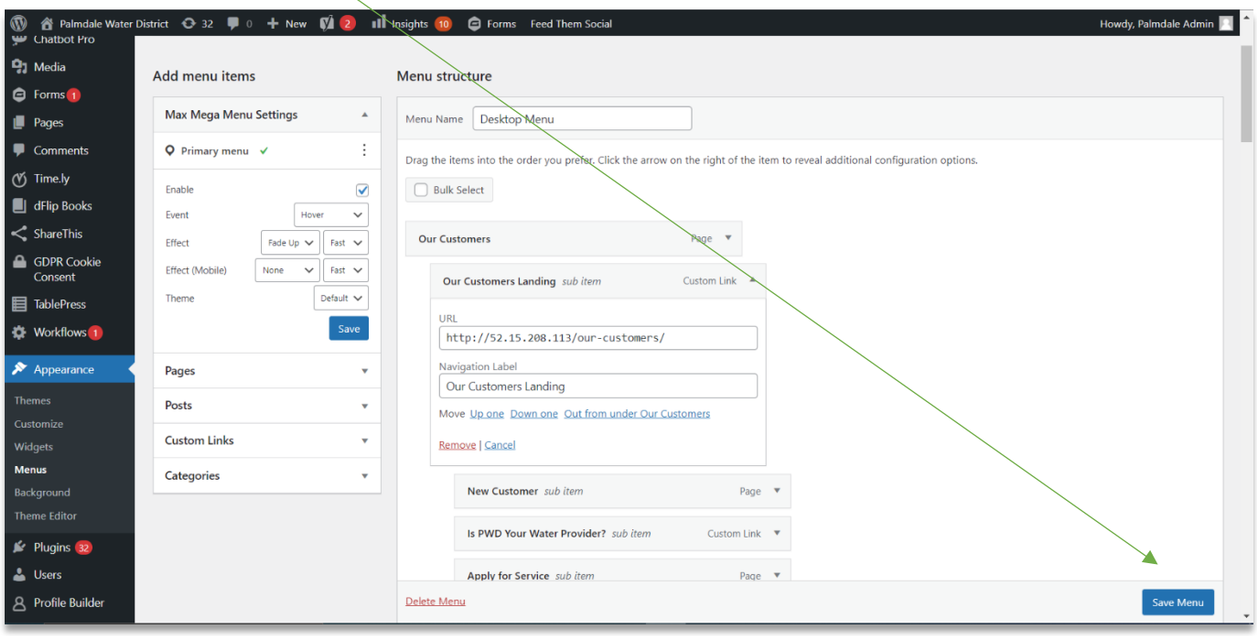
5. We will append "Landing" to the "Navigation Label" text and it will look as shown below.



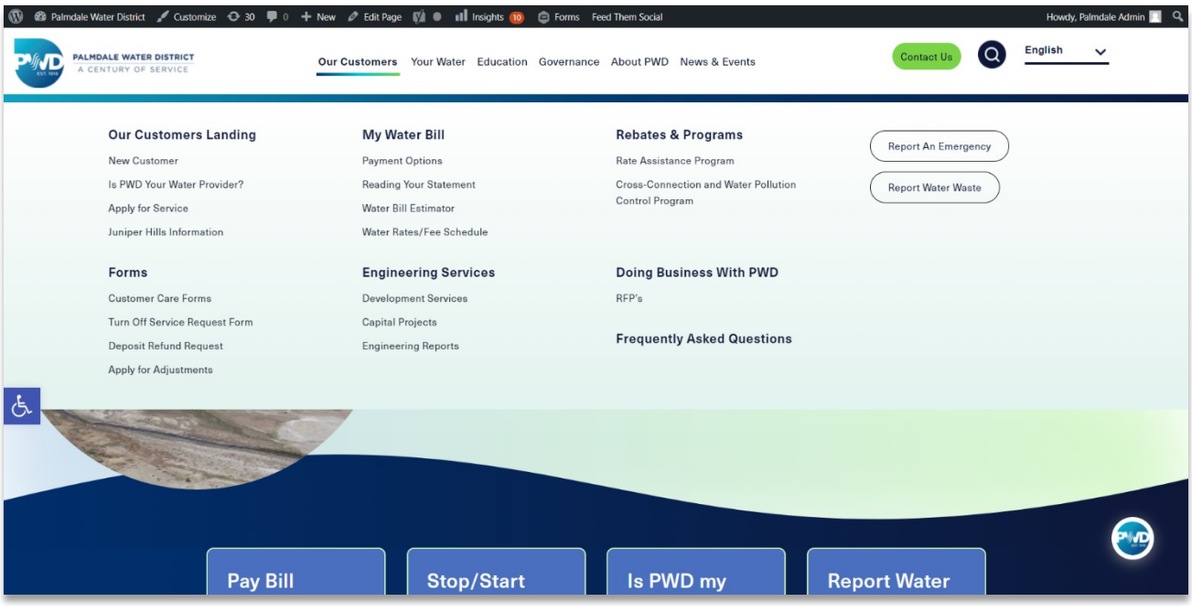
Prior to typing in "Landing" to the Navigation Label

Type "Landing" after Our Customer as shown

6. Hit “Save Menu” on the bottom right corner as marked below and you’ve made your update!



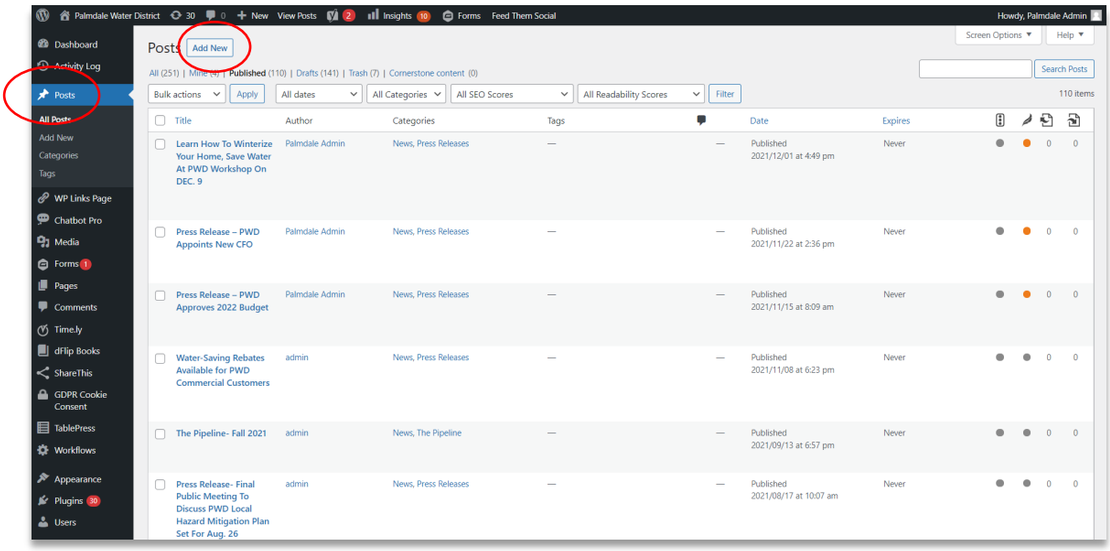
7. To confirm your change, visit your site menu and you’ll notice that the menu has been updated.



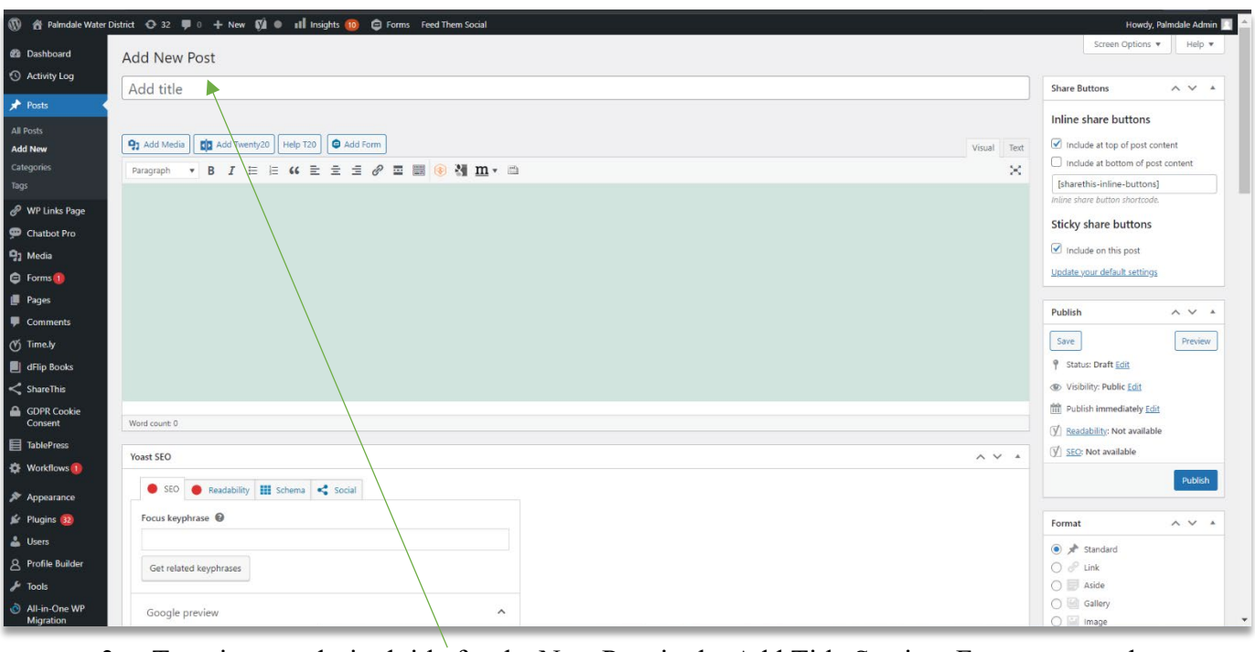
Creating Posts and Categories

Posts are generally news or informational updates about a certain topic or talking point. You use a post when you want to add a blog aspect to your site. Categories are used to sort and group your blog posts into different sections.

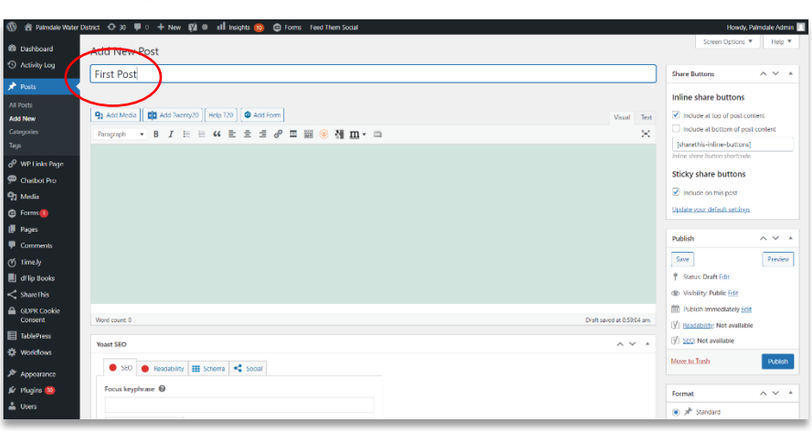
1. On the admin page, click on the ‘Posts’ option present in the left sidebar followed by the ‘Add New’ button available at the top of the page and the new empty post will be displayed.



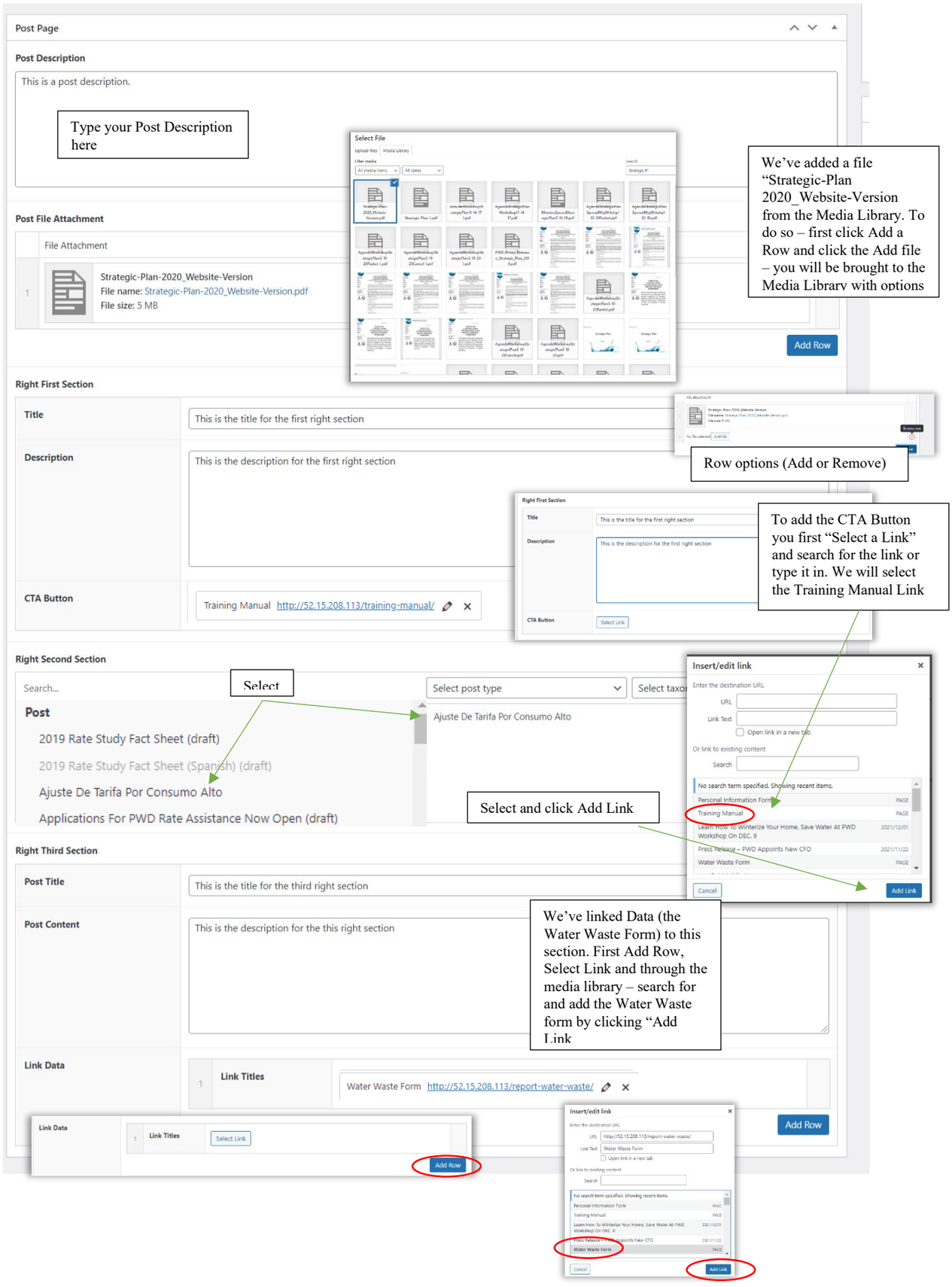
2. The following page will get displayed.



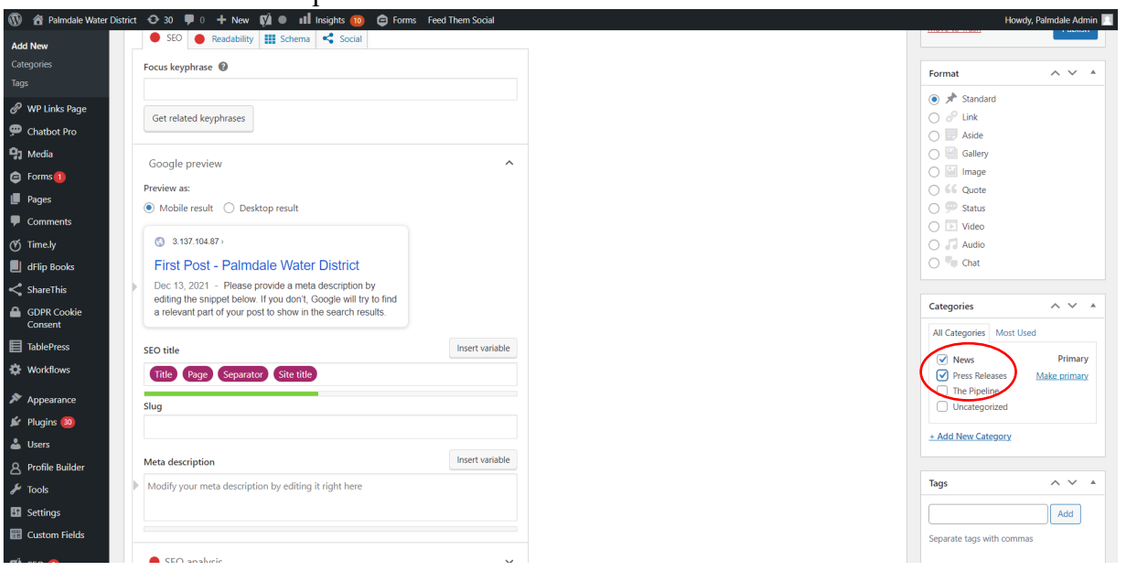
3. Type in your desired title for the New Post in the Add Title Section. For our example we will create a new post called “First Post”.



4. Scroll down to the “Post Page” section and add your new post content into the input fields. We’ve filled it up in our example as follows.

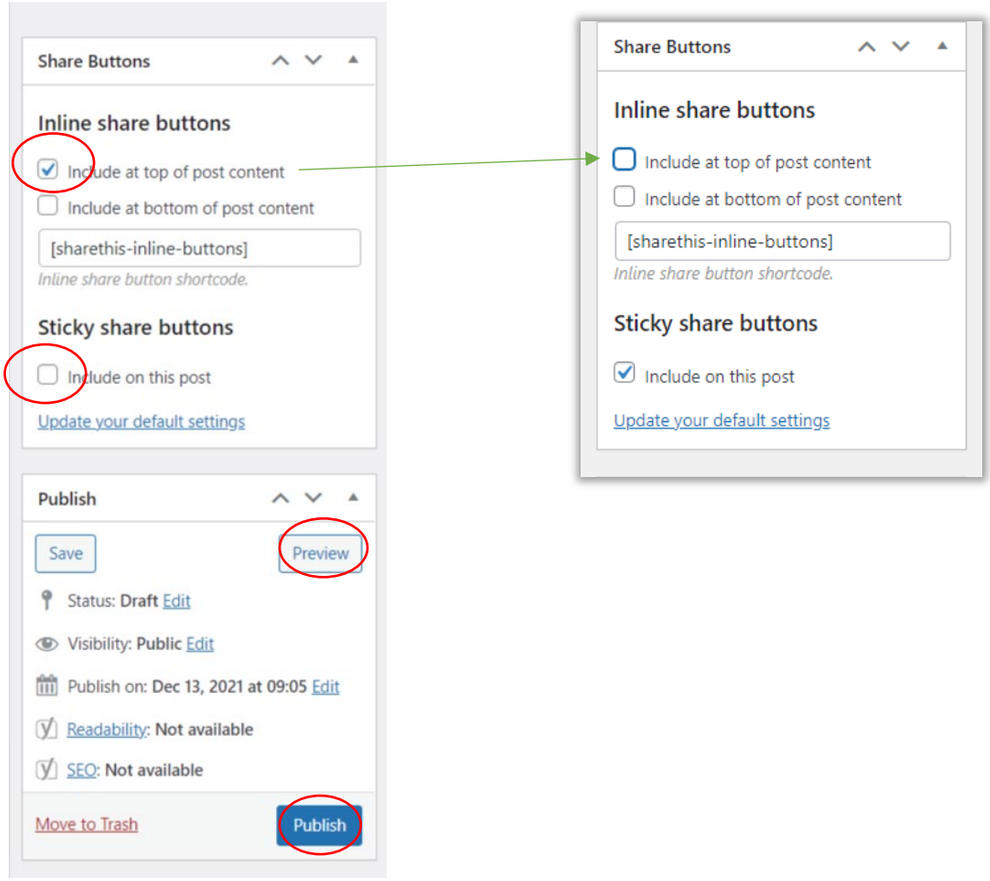


5. Scroll up to the “Categories” section on the right side of the page and click on your desired checkboxes. For our example we’ve checked News and Press Releases.



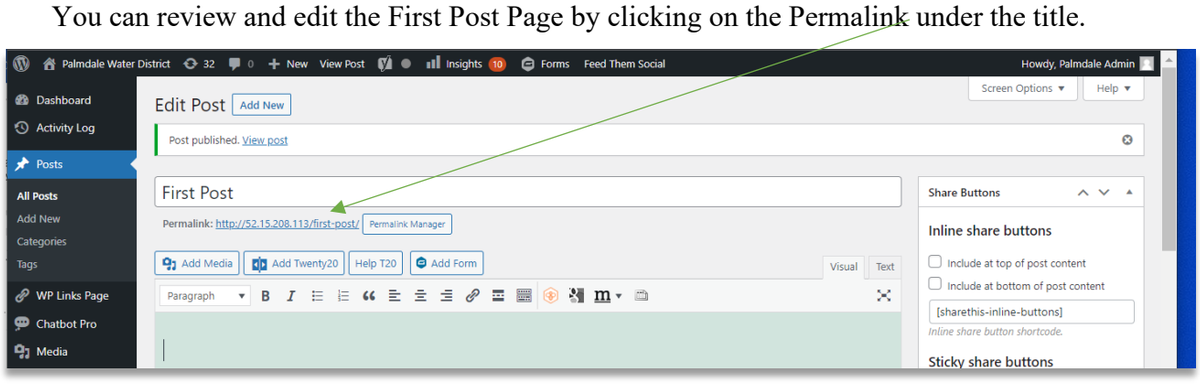
6. Scroll up the page and uncheck “Include at top of post content” and “Include on this post” checkboxes as shown, then click on Preview to “Preview” your post or click “Publish”.

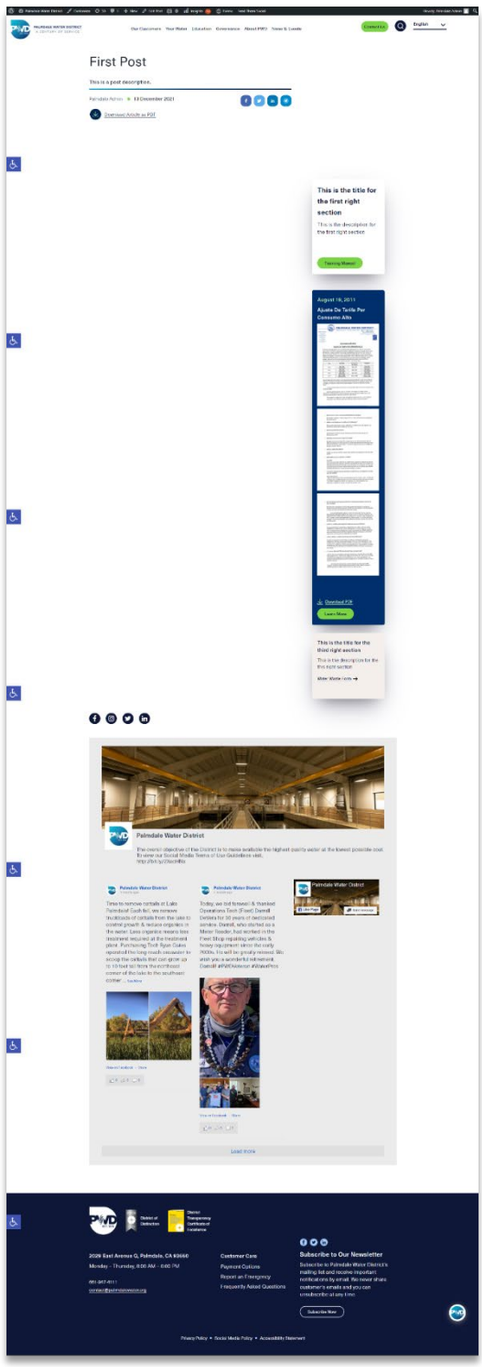
   We suggest previewing prior to making any published changes. If you’re satisfied with your new post – click Publish.



7. You’re set! After you hit Publish, WordPress updates the Add a New Post page to the Edit Post page for the First Post.

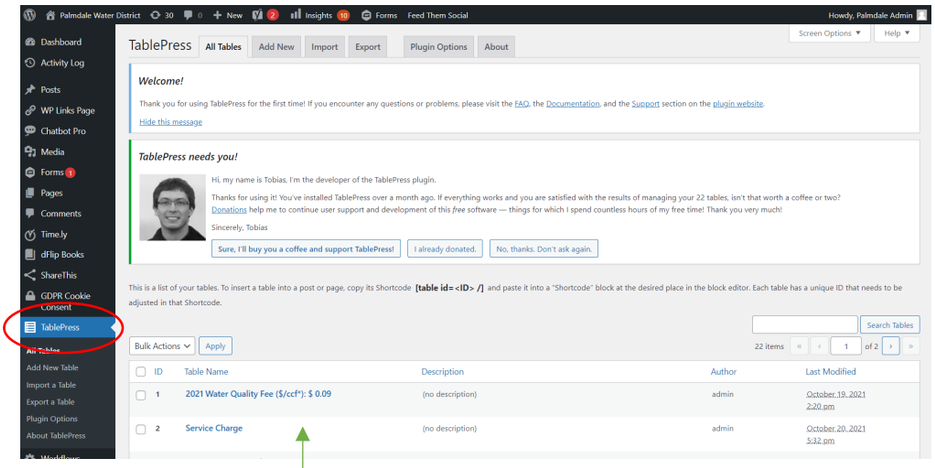
   You can review and edit the First Post Page by clicking on the Permalink under the title.





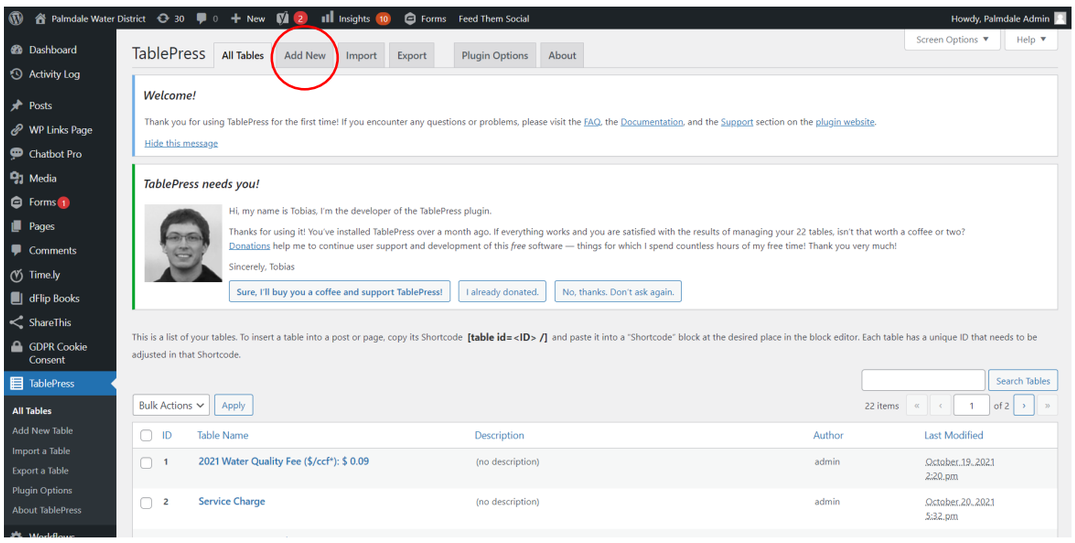
Creating Tables – using TablePress

1. Click on *"TablePress"* from the left navigation bar in the dashboard. This page is the control center for the plugin. The process of creating, editing, and customizing tables all starts here.



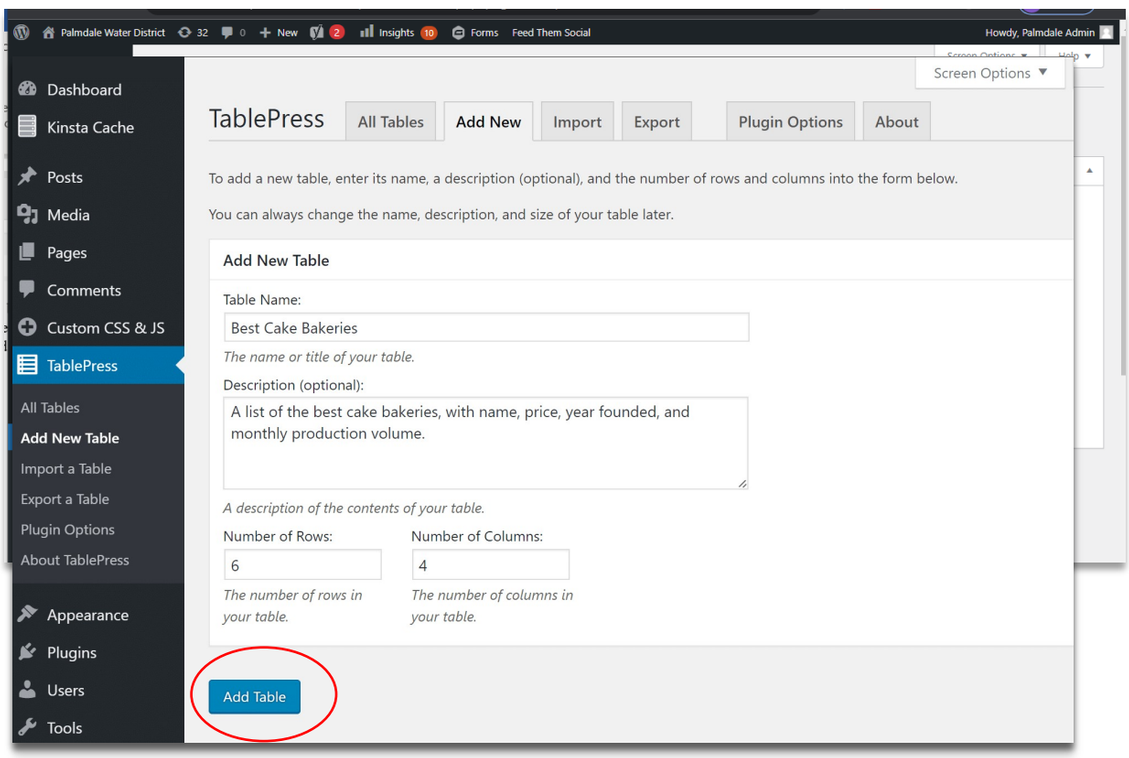
All existing tables are listed here.

To start, click the “Add New” button on the page’s navigation.



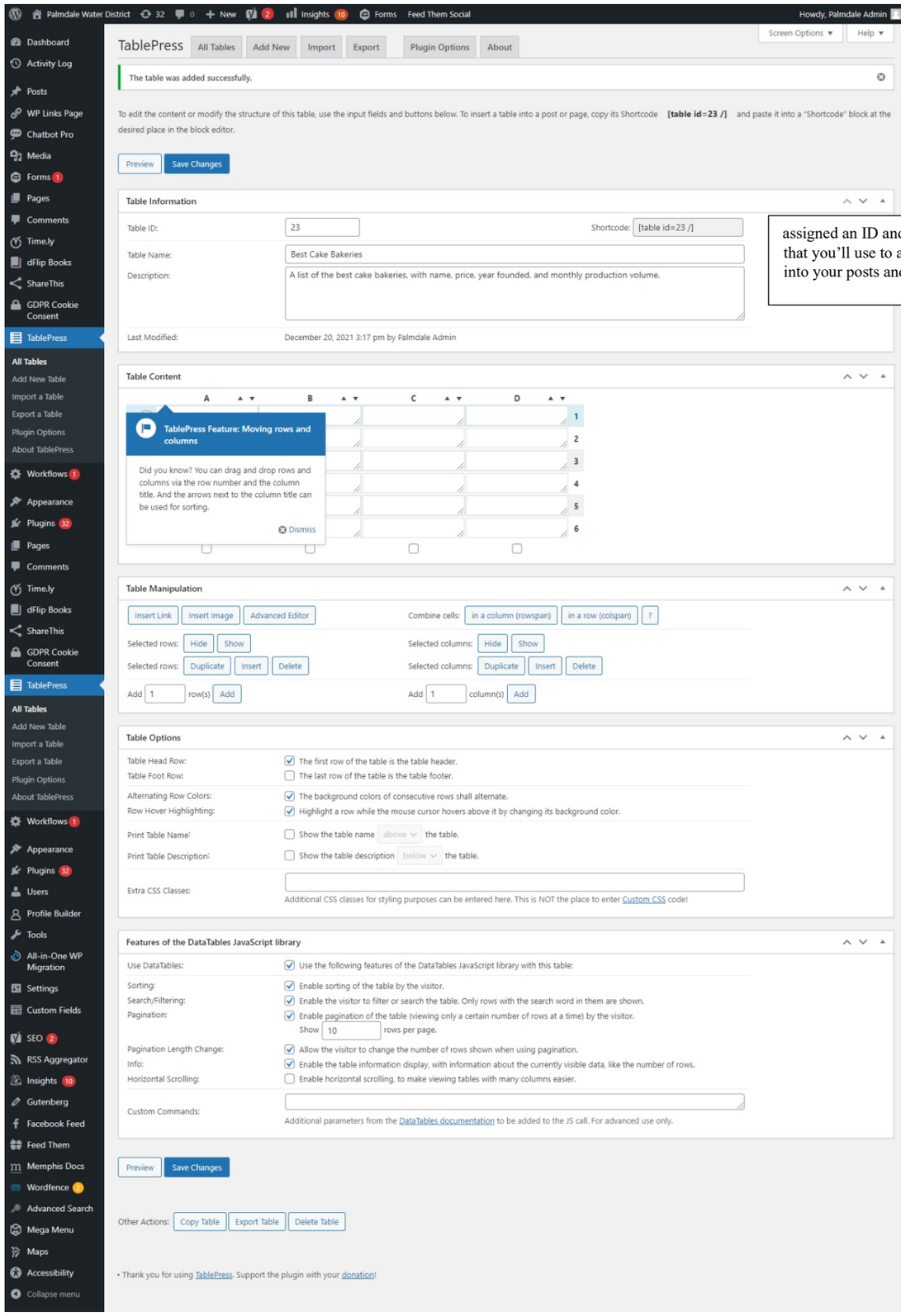
On the Add New page, you will be prompted to enter a name for your table, enter a description (this is optional), and specify the dimensions of your table (number of rows & columns).

Once you’ve done that, click the “Add Table” button. As an example, we’ll do a table names



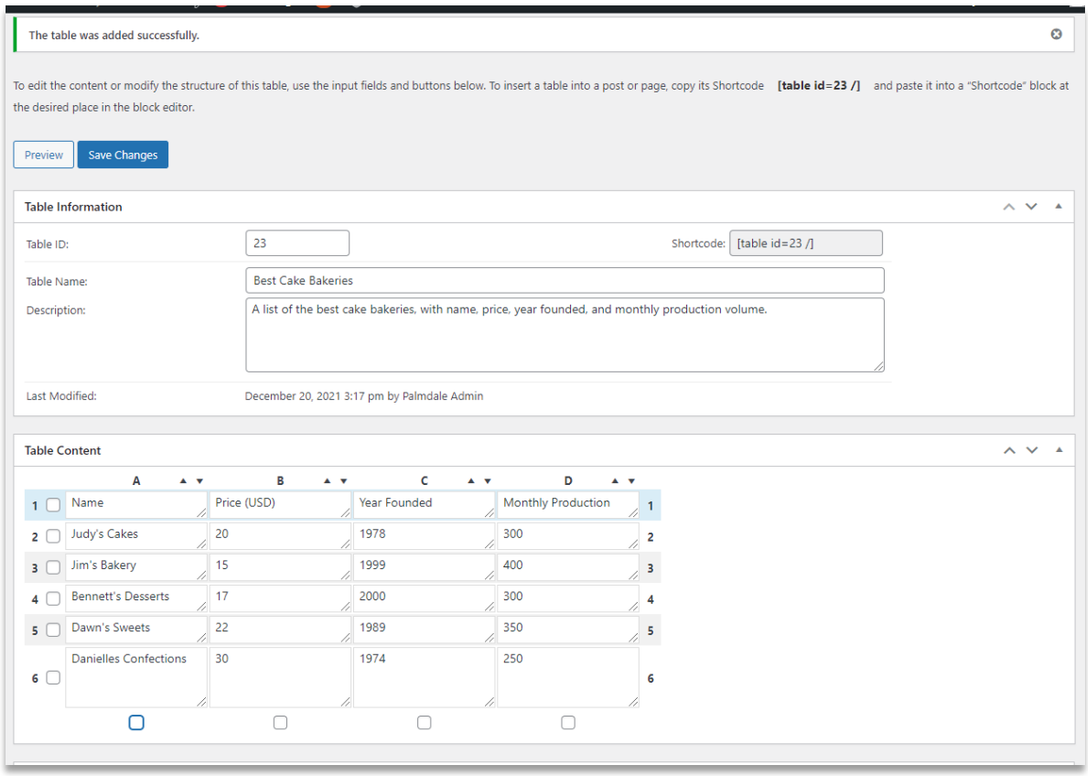
“Best Cake Bakeries”.

On the next page, your table will be assigned an ID and a shortcode that you’ll use to add the table into your posts and pages. You’ll also start filling out the individual cells of your new table.

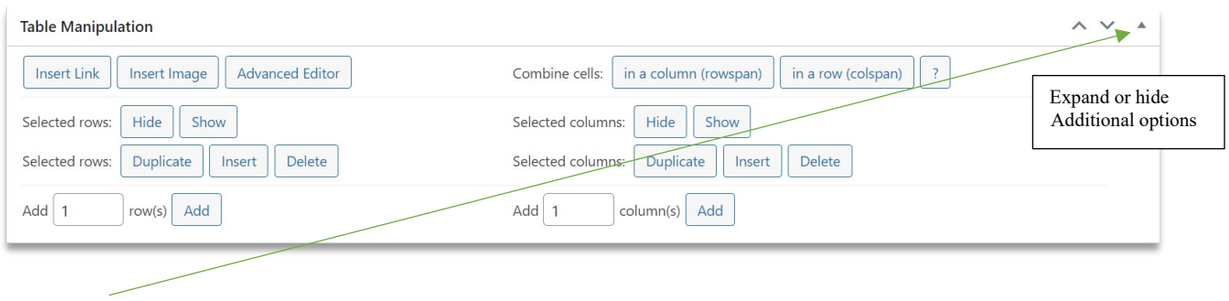


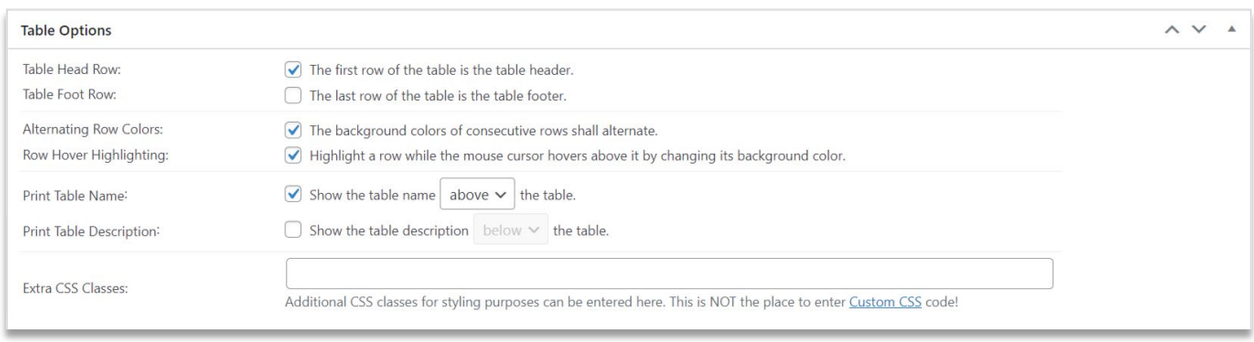
assigned an ID and a shortcode that you'll use to add the table into your posts and pages.

The interface you use to fill out the table is akin to your average Excel spreadsheet. Here's what it *looks like* when your table is all filled out.

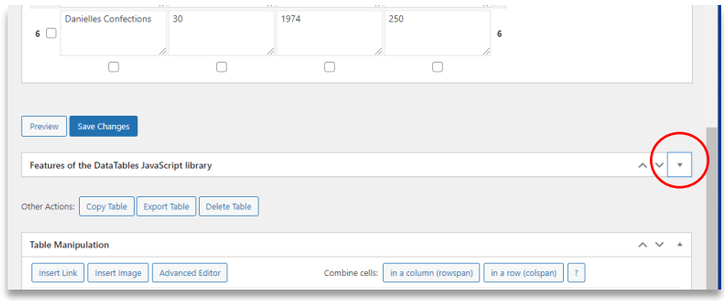


a. Further down on the page you can adjust the table through the basic options. You can insert links/images in your cells, duplicate/delete selected rows and columns, add CSS classes for styling purposes, combine cells, alternate color by row, enable sorting/pagination, and more.

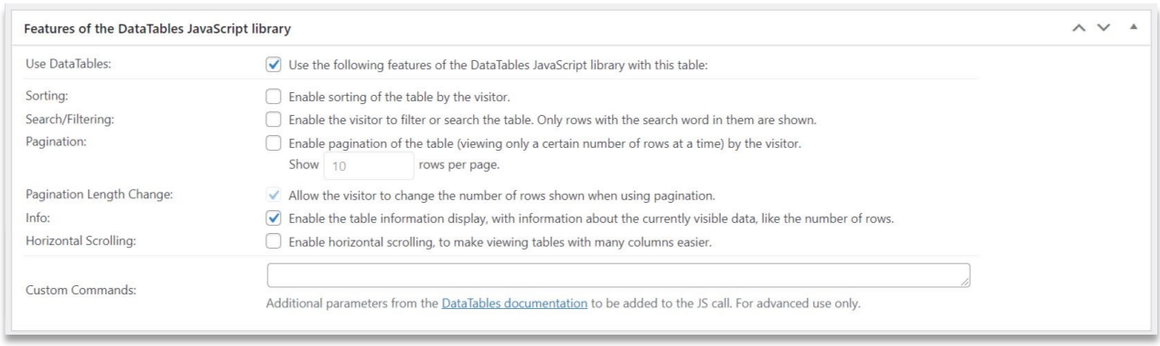


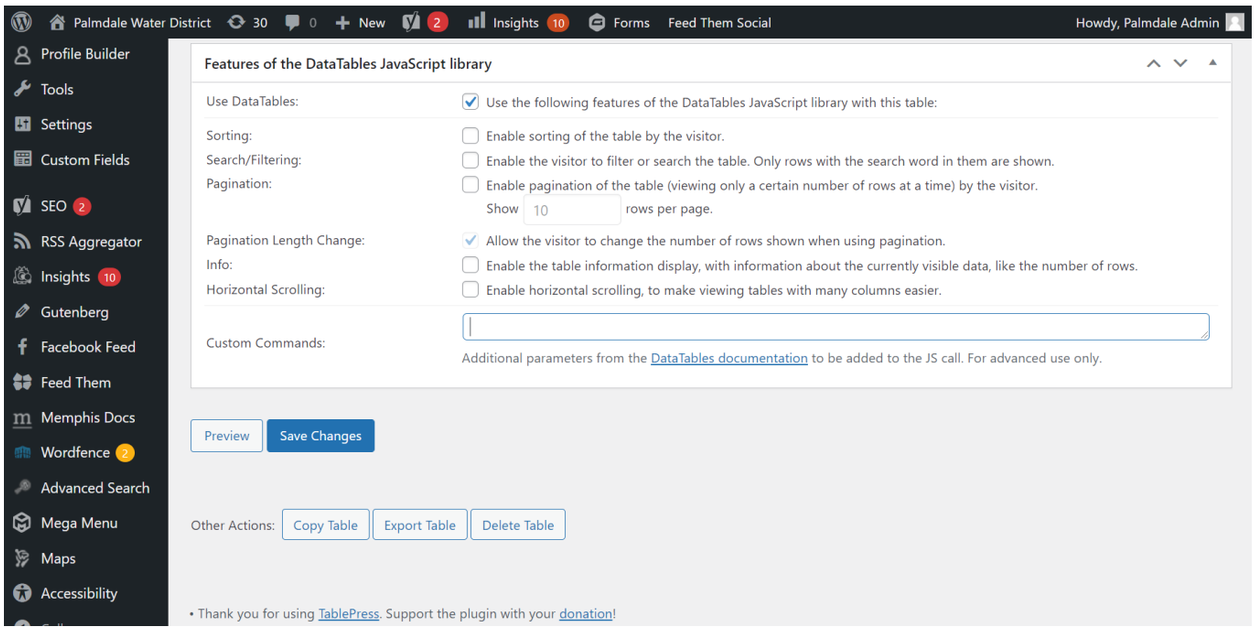


c. Next expand the options in the “Features of the DataTables JavaScript library

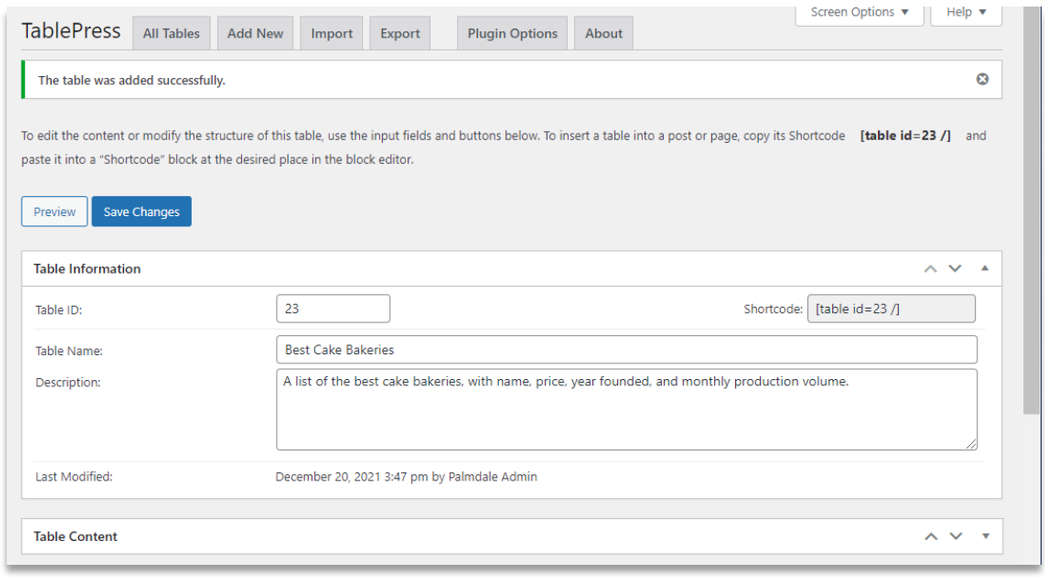


d. Make sure that the “Features of the DataTables JavaScript library” section has only the following checkboxes checked.

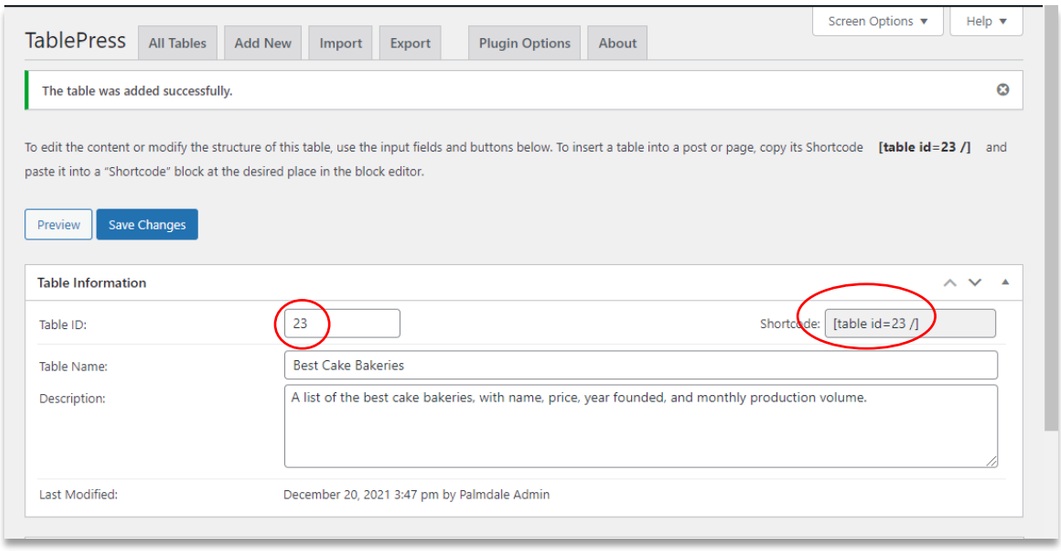




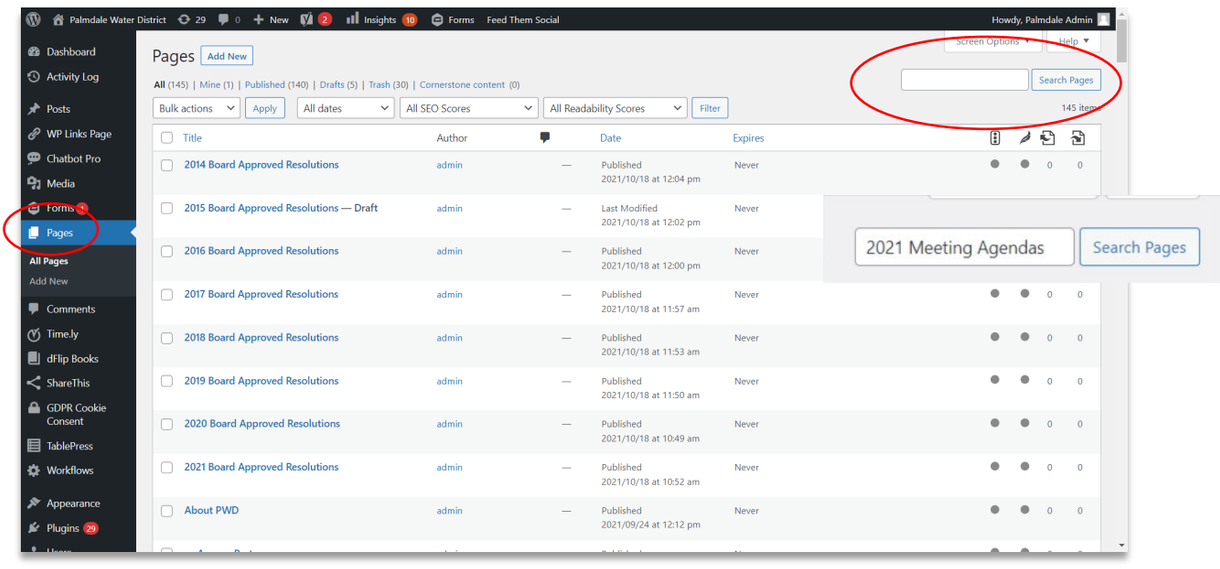
f. When saving changes you’ll receive a confirmation that your table was added successfully



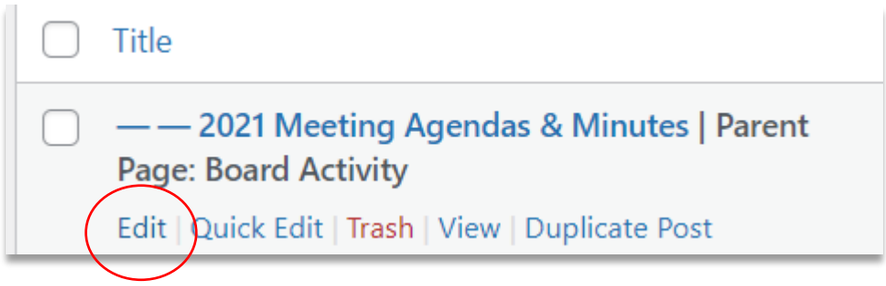
g. In the Table Information table – expand and copy down the Shortcode generated for this table. For our example table, our table ID was 23, so the shortcode noted is **[table id=23 /]**



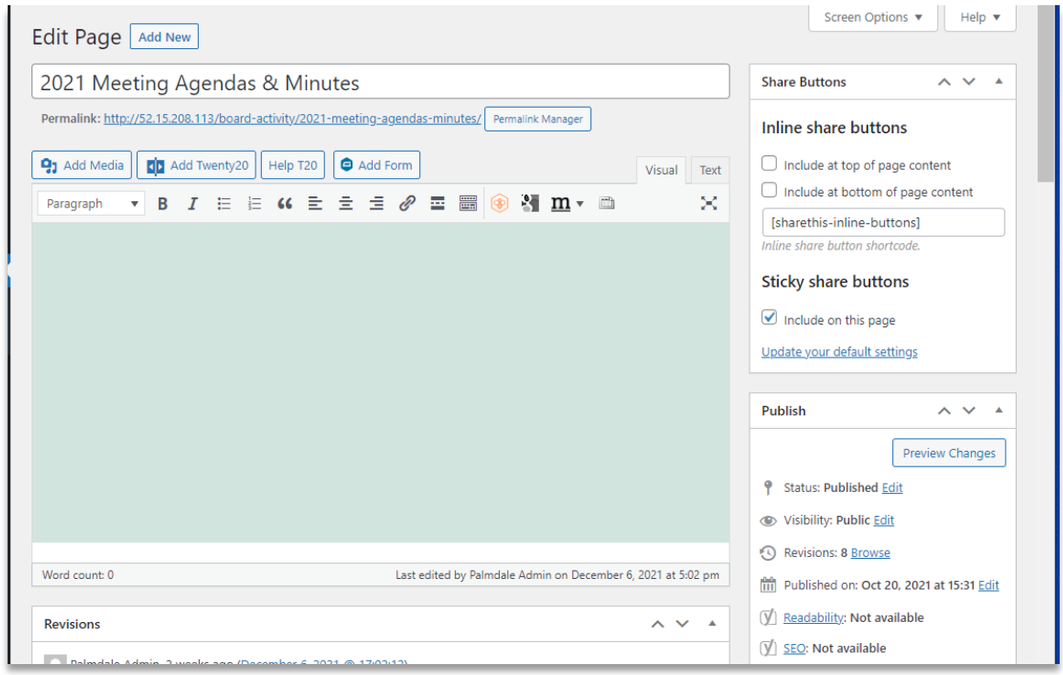
h. Next, go to your "Posts" or Pages", navigate to the post or page option on the dashboard and search for your page or post using the search bar to find it in the list below. In our example, we want to add the table in the "2021 Meeting Agendas & Minutes" page so we will search for "2021 Meeting Agendas & Minutes" in the search field and click on Search Pages.



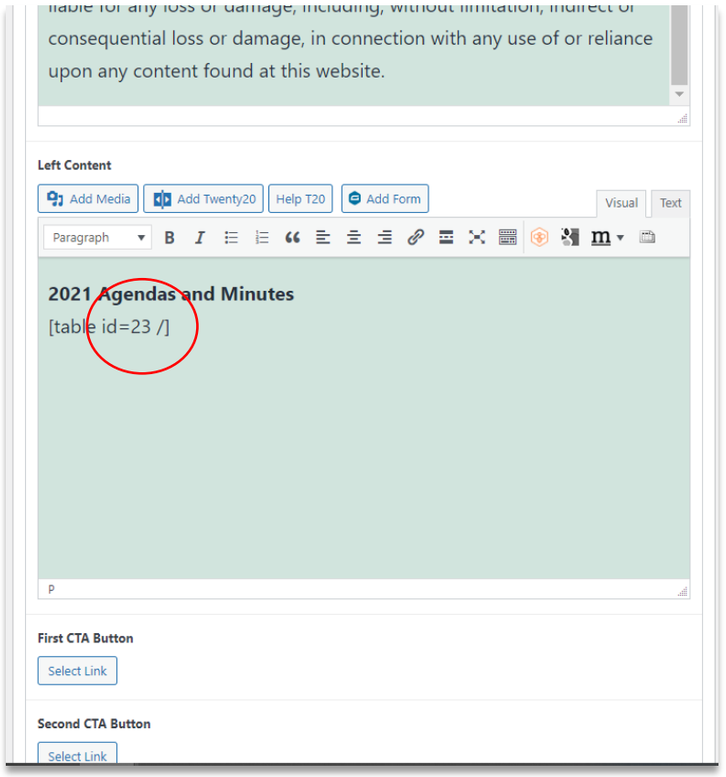
k. From the filtered list, we will hover over the “2021 Meeting Agendas & Minutes” page and click on “Edit”.



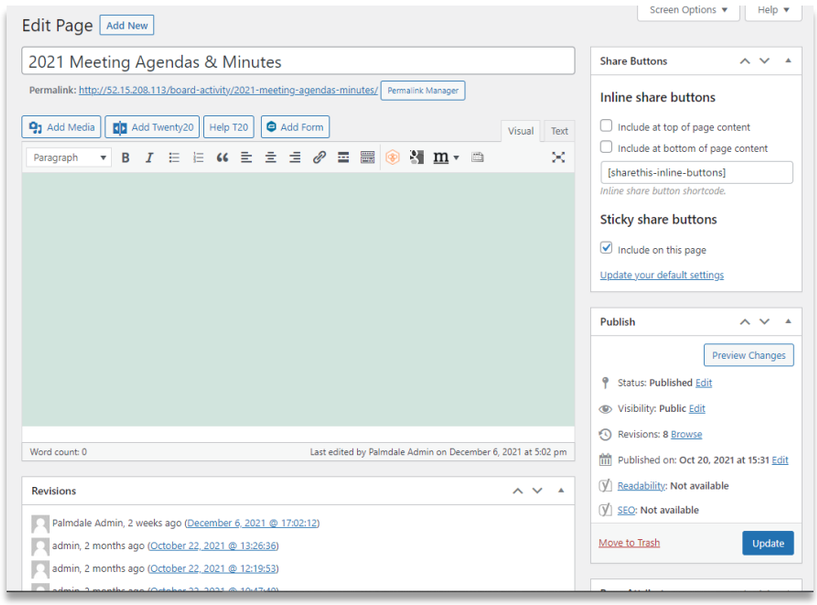
The following page pops up:



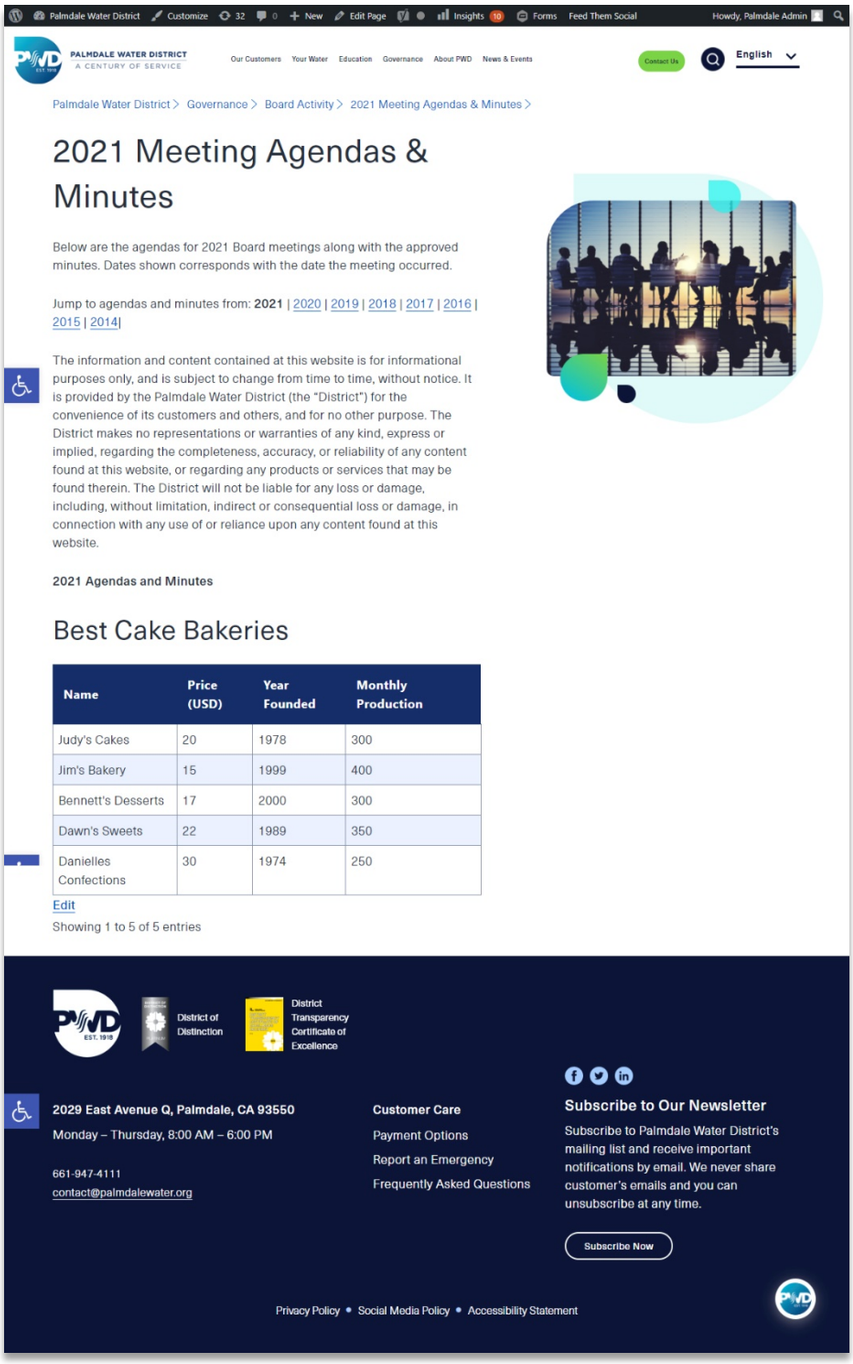
l. Scroll down the page to the Left Content section Now in your page builder, update the Shortcode Table ID to your new table in the desired description or ACF field as shown below.



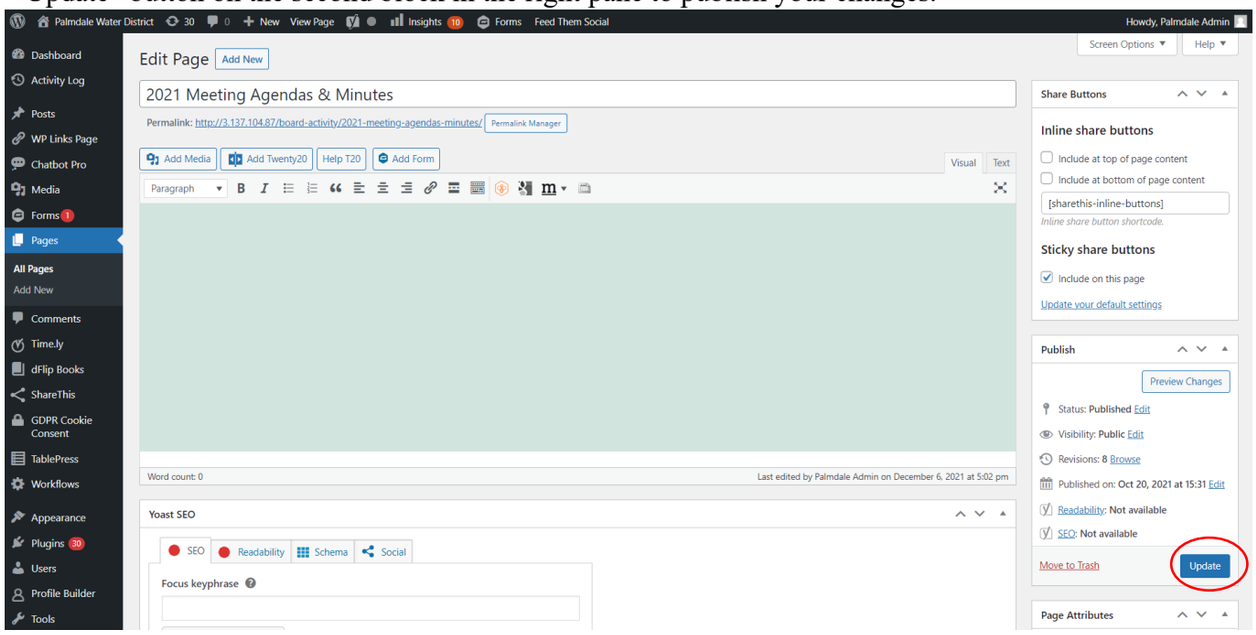
m. Once you have made all necessary changes to the page, we suggest you click on preview to see your changes to the page with the new table that has been inserted.



The updated page (in Preview) with the new table looks as follows:



“Update” button on the second block in the right pane to publish your changes.



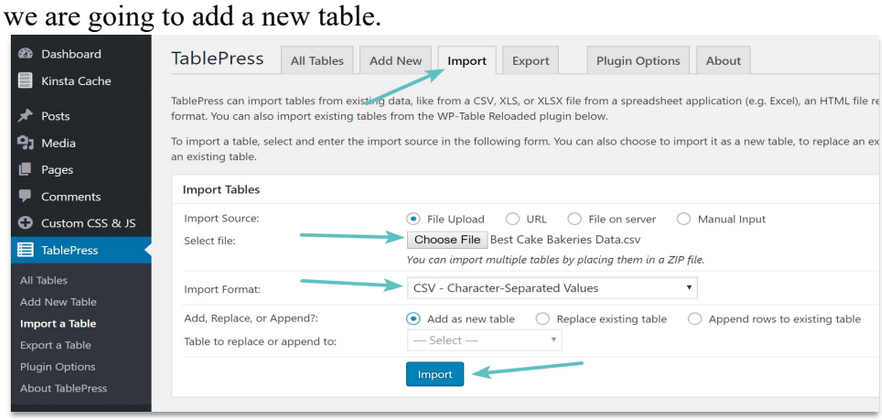
n. Depending in what content is inputted on the table, the following image shows how a table gets displayed.



Description	Agenda	Packet	Minutes
October 25, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	
October 18, 2021: Palmdale Recycled Water Authority (PRWA) Meeting at City of Palmdale (6:00 p.m.)	PDF	PDF	
October 14, 2021: Antelope Valley State Water Contractors Association Meeting (6:00 p.m.)	PDF	PDF	
October 11, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	
September 27, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
September 20, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.)	PDF		
September 13, 2021: Public Facilities Corporation Meeting (6:00 p.m.)	PDF		
September 13, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
August 23, 2021: Public Financing Authority Meeting (6:00 p.m.)	PDF	PDF	
August 23, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
August 16, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.)	PDF		
August 12, 2021: Antelope Valley State Water Contractors Association Meeting (6:00 p.m.)	PDF	PDF	PDF
August 9, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
July 26, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
July 19, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.)	PDF		
July 12, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
June 28, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
June 21, 2021: Palmdale Recycled Water Authority (PRWA) Meeting at City of Palmdale (6:00 p.m.)	PDF	PDF	PDF
June 14, 2021: Public Financing Authority Meeting (6:00 p.m.)	PDF	PDF	PDF
June 14, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
June 3, 2021: Antelope Valley State Water Contractors Association Meeting (6:00 p.m.)	PDF	PDF	
May 27, 2021: Special Board Meeting (3:00 p.m.)	PDF	PDF	
May 24, 2021: Regular Board Meeting (6:00 p.m.))	PDF	PDF	PDF
May 17, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.))	PDF		
May 10, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
April 26, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
April 19, 2021: Palmdale Recycled Water Authority (PRWA) Meeting @ City of Palmdale (6:00 p.m.)	PDF	PDF	PDF
April 12, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
March 22, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
March 8, 2021: Regular Board Meeting Addendum (6:00 p.m.)	PDF	PDF	
March 8, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
March 15, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.)	PDF		
February 22, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
February 17, 2021: Palmdale Recycled Water Authority (PRWA) Meeting @ City of Palmdale (6:00 p.m.)	PDF	PDF	PDF
February 11, 2021: Antelope Valley State Water Contractors Association Meeting (6:00 p.m.)	PDF	PDF	PDF
February 8, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF
January 26, 2021: Palmdale Recycled Water Authority (PRWA) Notice of Cancellation (6:00 p.m.)	PDF		
January 25, 2021: Regular Board Meeting (6:00 p.m.)	PDF	PDF	PDF

Importing Tables – using TablePress

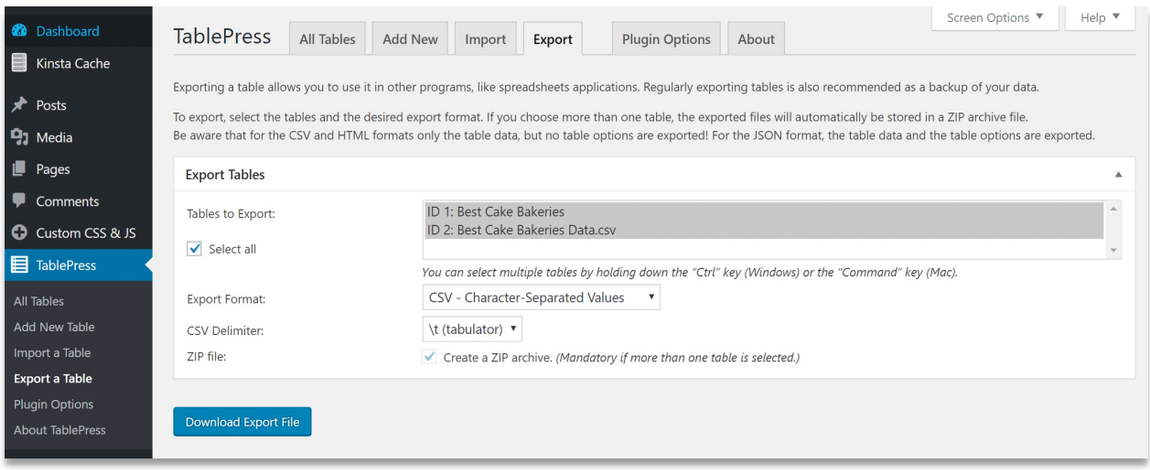
1. If you've already have your data ready (such as an Excel sheet or Google Sheets document) and waiting to go in an external format, you can import it right into the TablePress plugin.
2. To import a table, navigate to *WP Admin > TablePress > Import a Table*. On this page, you'll select your import source (direct upload, URL, file on the server, or manual input into a blank text area). My example data comes from a Google Sheets document which we downloaded to CSV format. (see below screen shot).
3. You can choose to use the imported data for either a completely new table, or as replacement/additional data for an existing table that you've already created. In this example, we are going to add a new table.



4. Once you click the "Import" button, you'll be redirected to the exact same editing page as when you created your table from scratch. Except this time, the table name, description, and content have already been filled in. All that remains to do is customize the options down at the bottom.
5. Once again, use the assigned table shortcode (this time for the 2nd table it was [table id=2 /]) in a post/page and the table has been imported. Note that since all the data was the same as when we created the table from scratch, the output was also the exact same.

Exporting Tables – using TablePress

1. Navigate to *WP Admin > TablePress > Export a Table*. Here you can select which table(s) you'd like to export, and in what format (CSV, HTML, or JSON).
2. If you use the CSV option as shown below, you can also set the CSV delimiter to a comma (,), semicolon (;), or tabulator (\t).
3. If more than one table is exported at a time, a zip archive is mandatory.

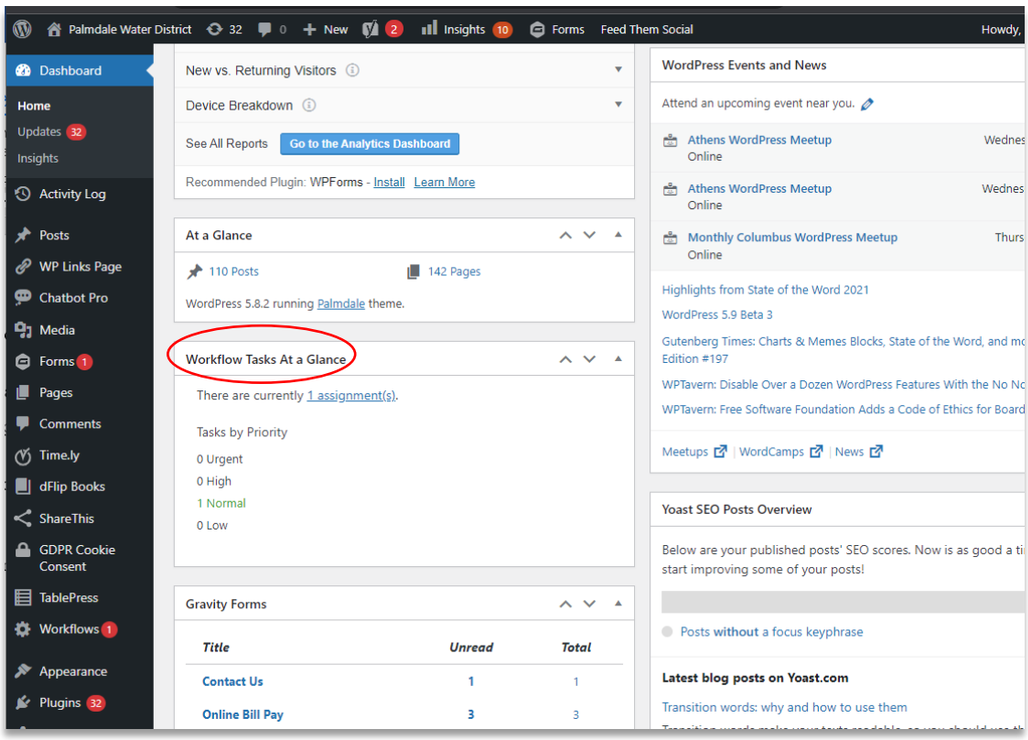


4. Once you've selected the table and export format, click the "Download Export File" button to get your data.

Working with Oasis - Workflow Management

Workflow management requires users multiple roles – Administrators and Editors - to interact during a content publishing flow.

The Dashboard displays the Admins' Workflow tasks.

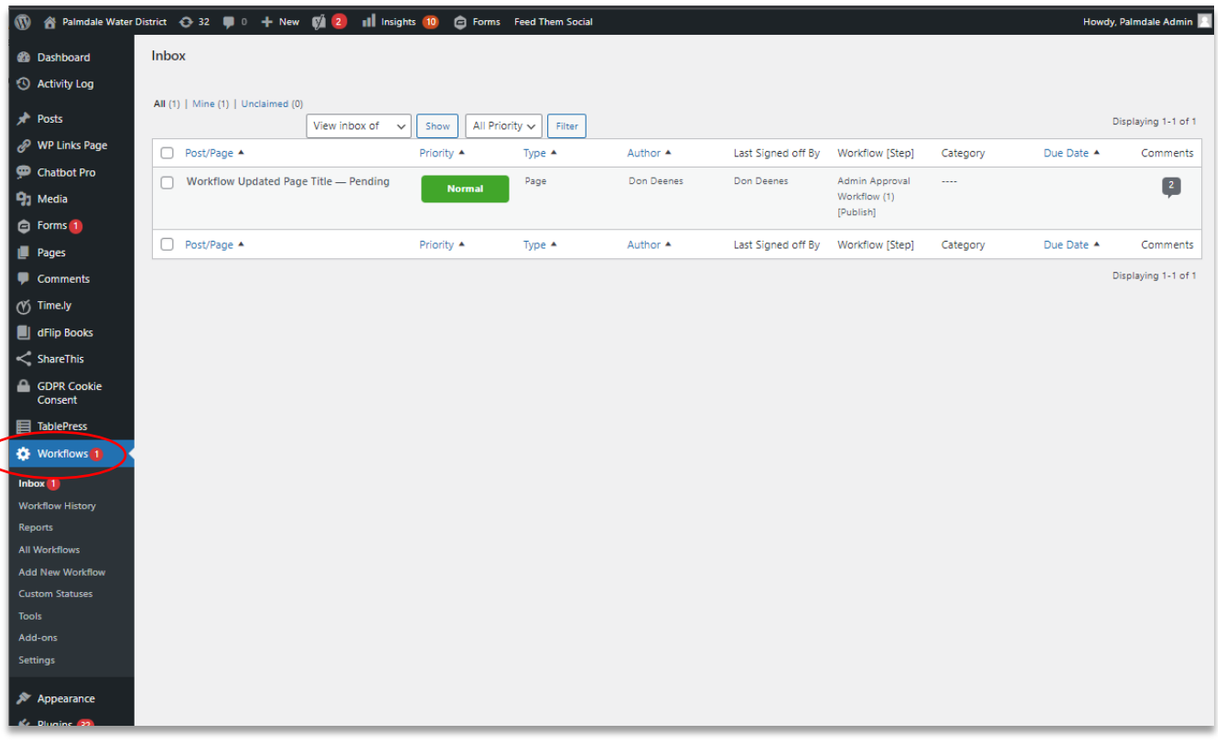


The Editor's job is to create or update a page or post content and receive sign off or feedback from the Administrator.

The Administrator is responsible for auditing and approving the Editors new content, updates modification requests, and then reviewing them, either approving and publishing the changes or providing necessary feedback to the Editors.

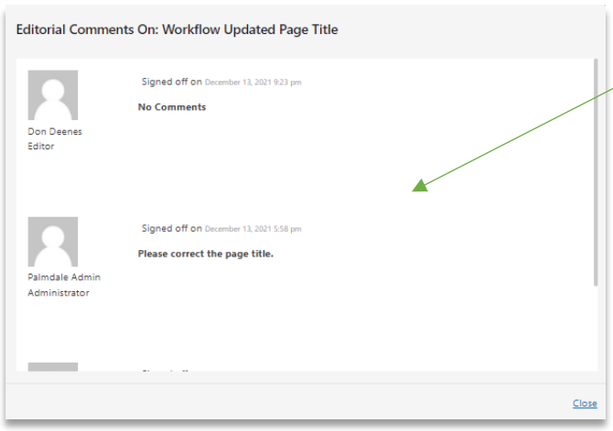
In the following example, we'll see how an Editor's content is reviewed and published through the Workflow.

1. Click on the Workflow on the left side of the Admin bar. The workflow is used for content from content editors who can not publish directly to the site to have the content reviewed and updated by the Admin/content approver.

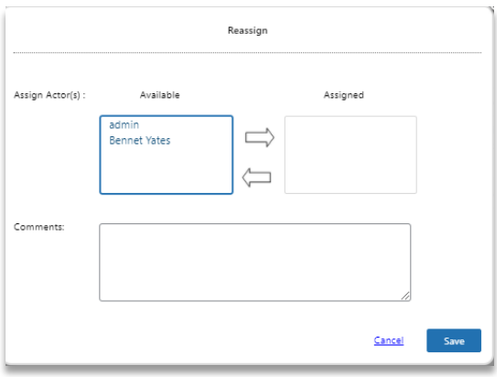


2. You have a series of options including:
   Inbox: showing you work flow notifications
   - Hover over the Notification to get to your available options
   - Check the comments on the far right

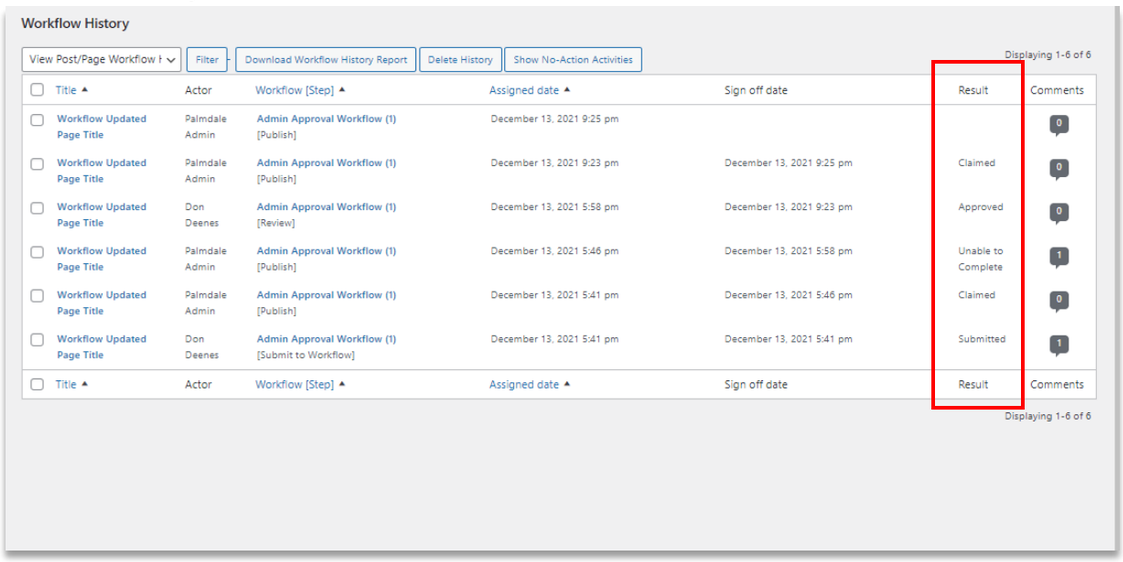




The approver / admin can be reassigned to other admins via the “Reassign” option.



Workflow history

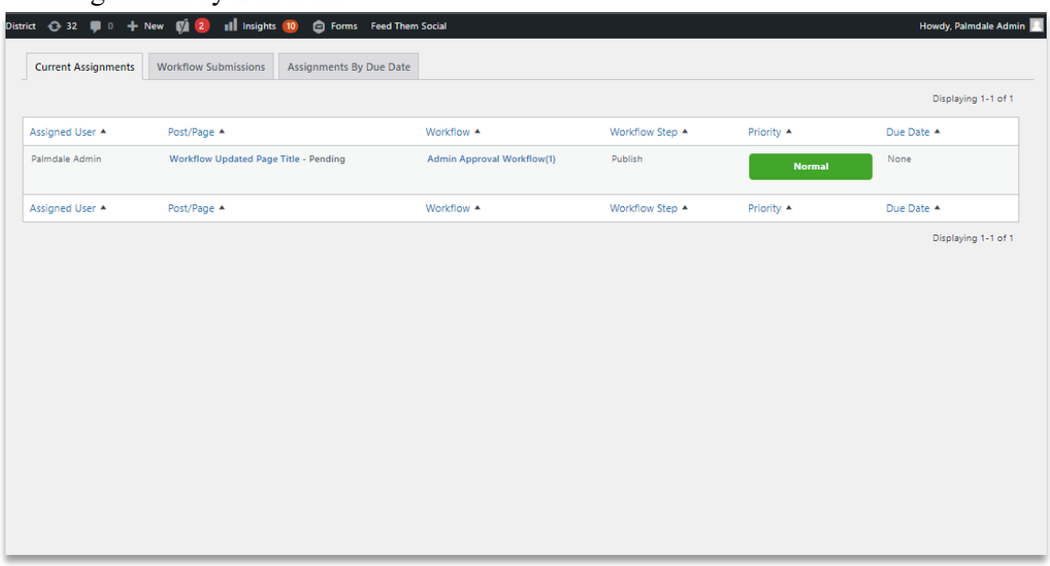


Workflow Reports: – with (3) options

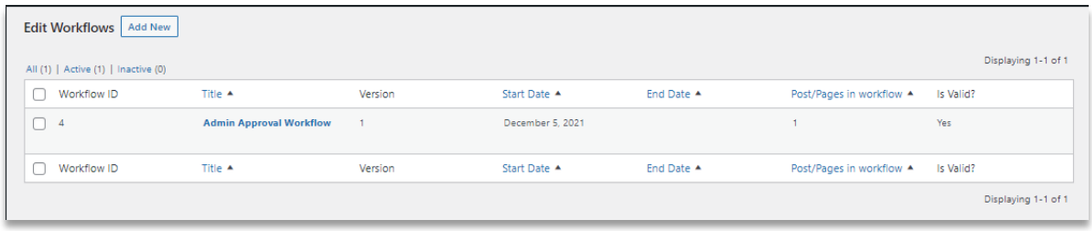
Current Assignments

Workflow Submissions

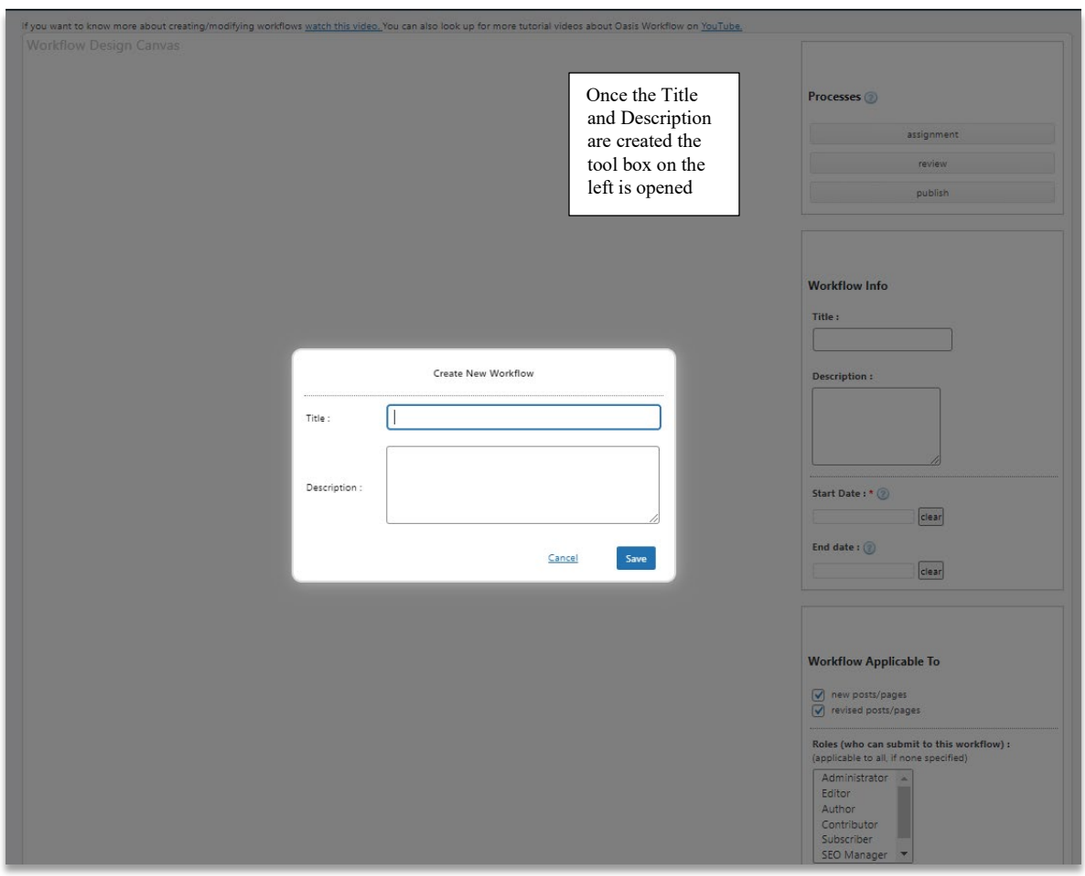
Assignments by Due Date



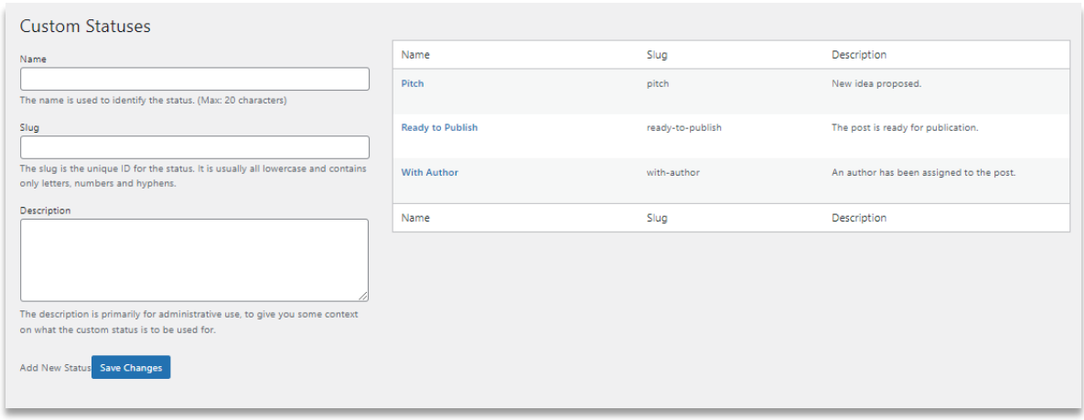
All Workflows:



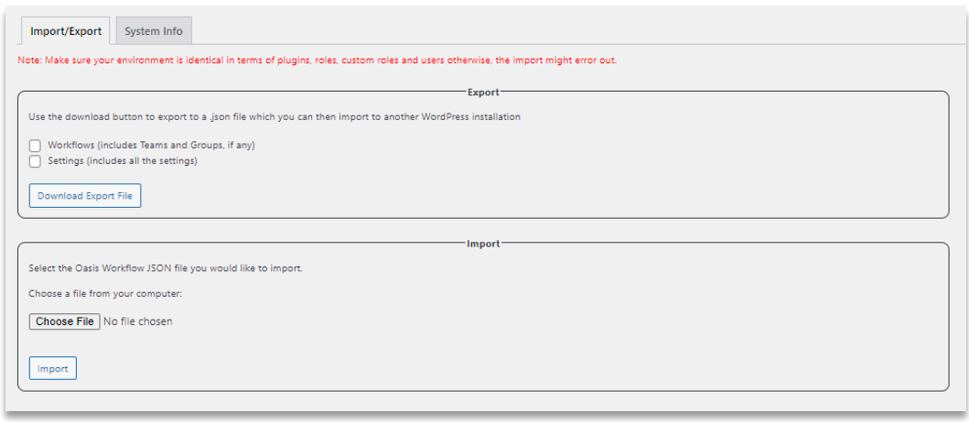
Add New Workflow:



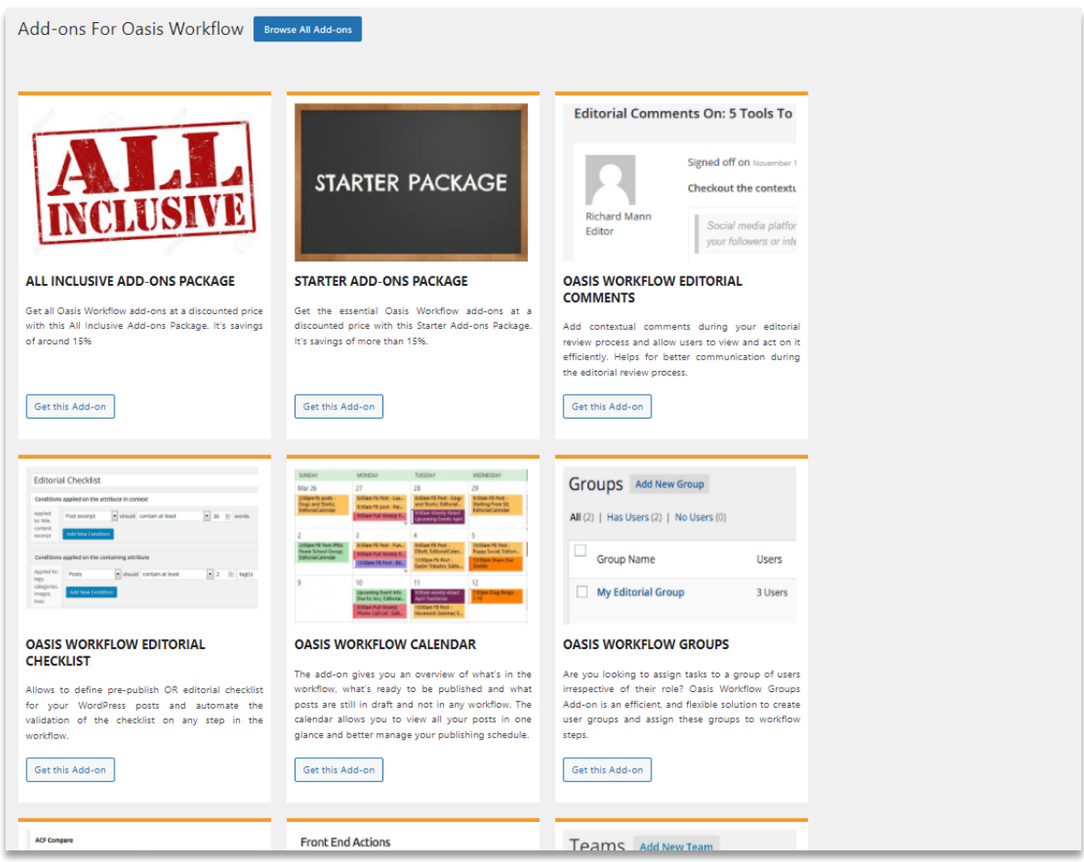
Custom Statuses:



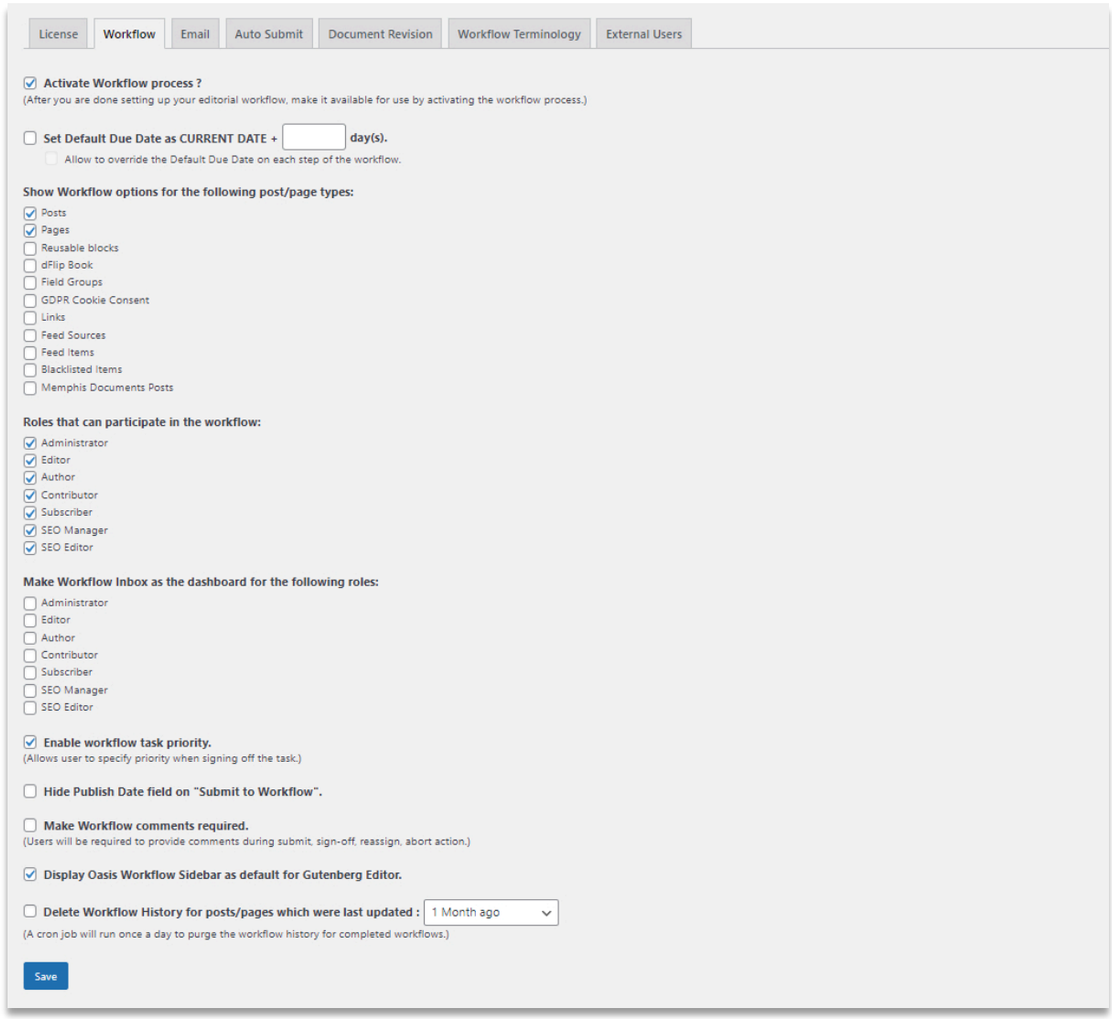
Tools:



Add Ons (for your Oasis Workflow plugin):



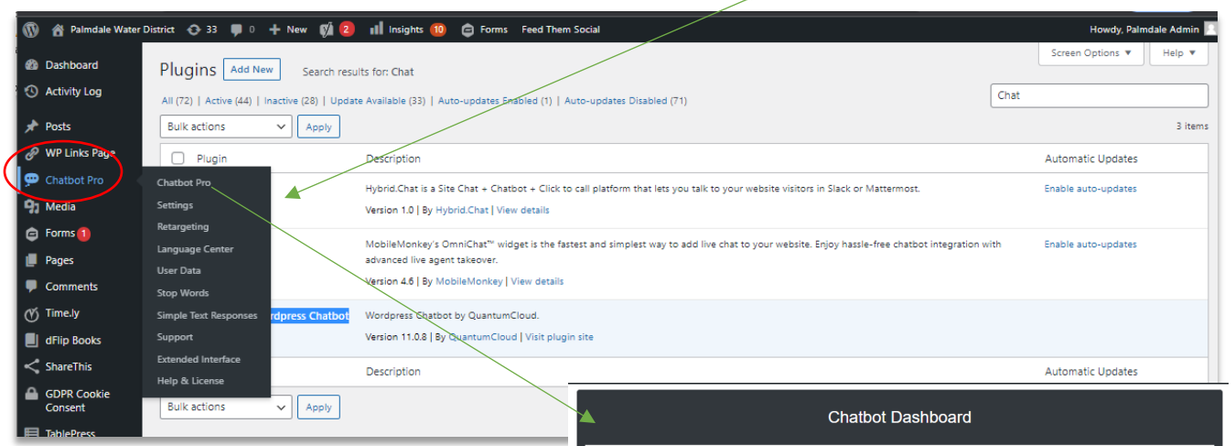
Settings: covering all available workflow options

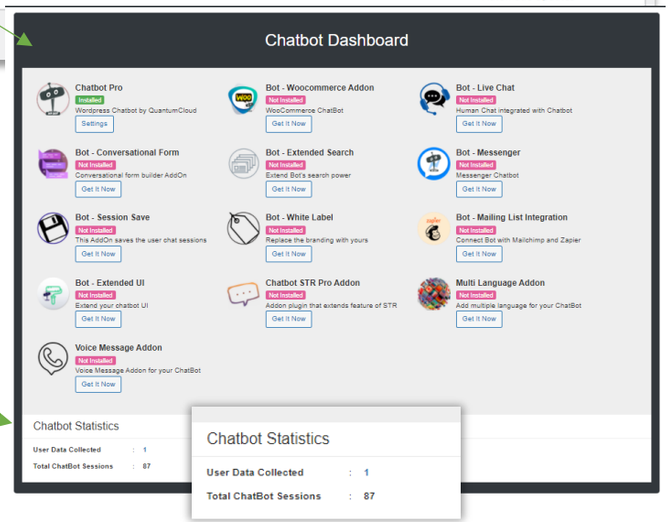


Working with your Chatbot

Your website Chatbot plugin is: **WPBot Pro Wordpress Chatbot**

To work with your chatbot – click on the "Chatbot Pro" name on the left bar.
By hovering over the "Chatbot" Pro name you can see the available options

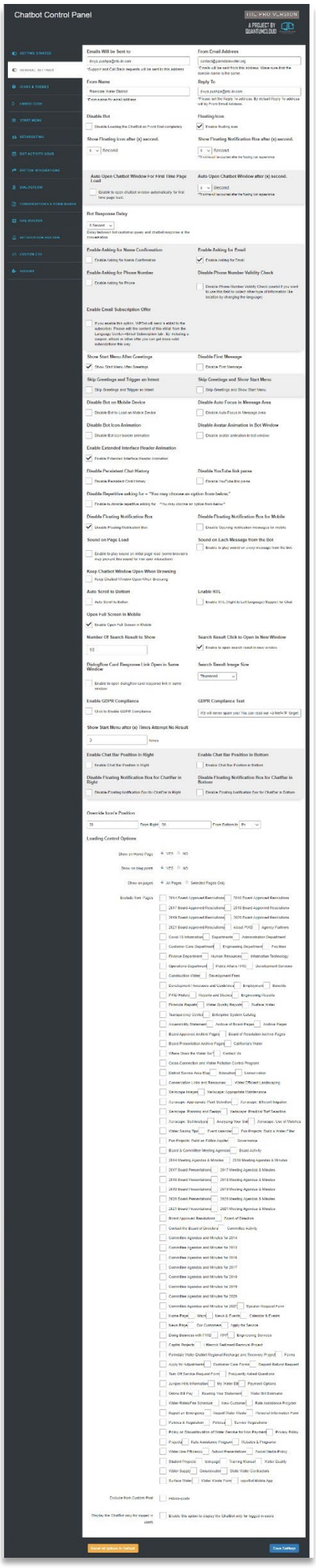


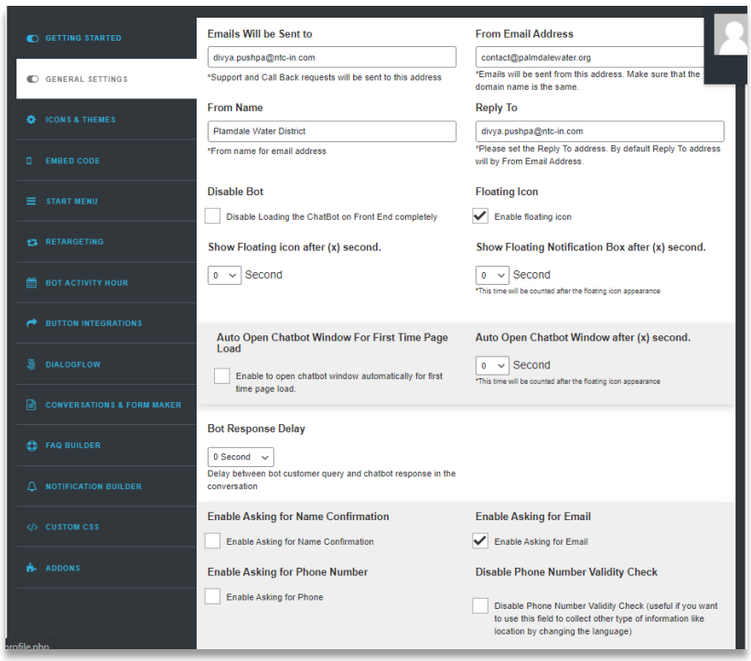


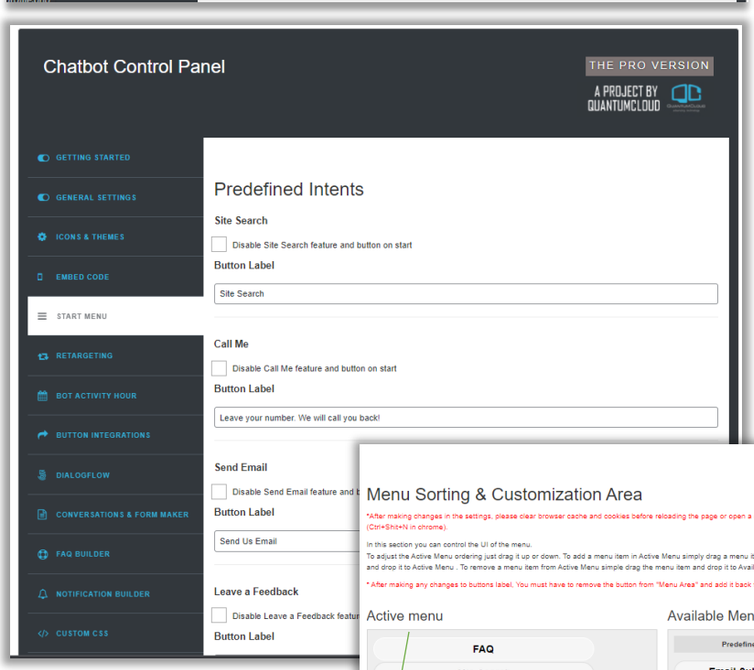
By clicking on the Chatbot Pro in the options menu you are taken to the Chatbot dashboard which will provide additional "to buy" chatbot options.

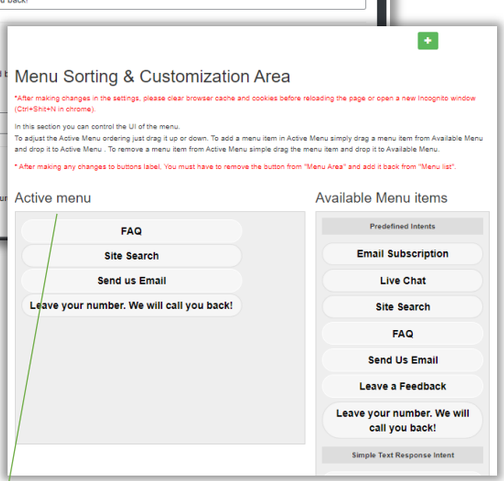
The Chat Statics is listed in the dashboard

To modify your Chatbot's characteristics you go to Settings. How your chatbot works, answers questions, excludes and includes pages and information, updating your Chatbots FAQ and critical components are made from this area. HANDLE YOUR SETTINGS WITH CARE AND ONLY THE PWD WEBSMASTER SHOULD ENTER THIS AREA.

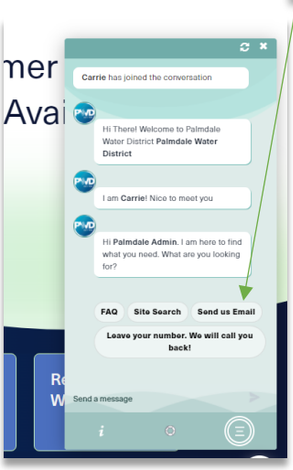






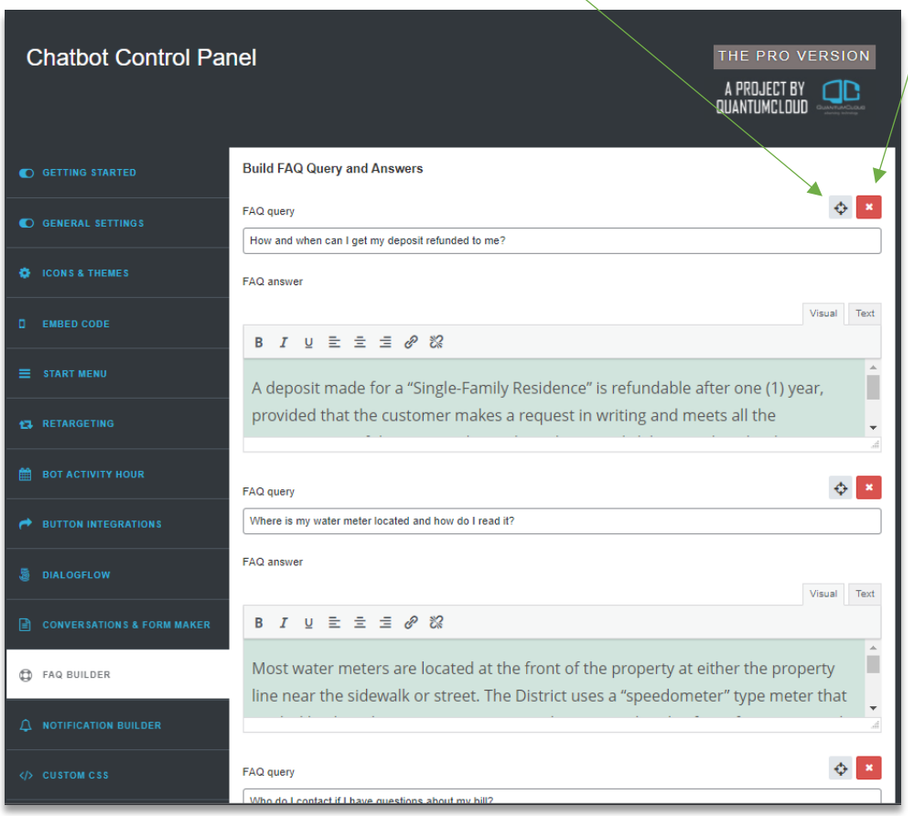


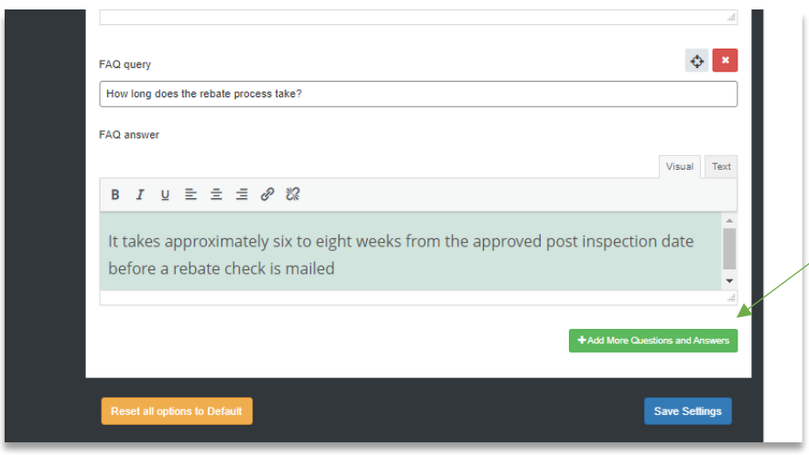
A key feature in this section is updating your Chatbot's online menu. Available menu items are drag and drop from Available to Active



Building your Chatbot's FAQ section

In Settings go to FAQ Builder and the following screen will appear.
You can update a FAQ and answer, move the FAQs order within the chatbot, delete a FAQ and answer, and add new FAQs in this section by scrolling to the bottom of the section and clicking "Add More Questions and Answers".

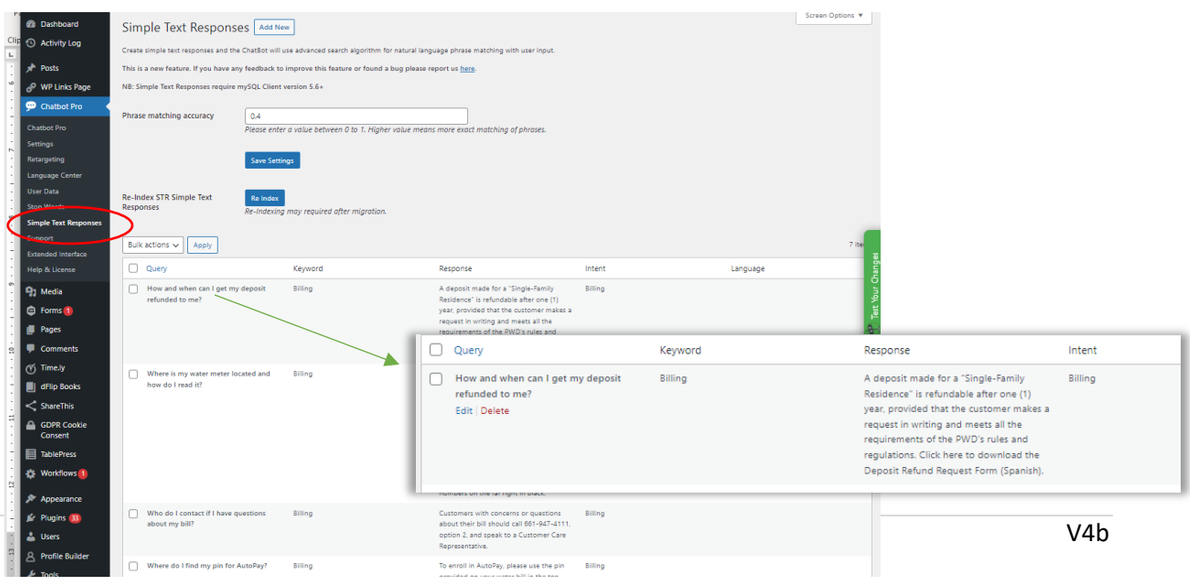




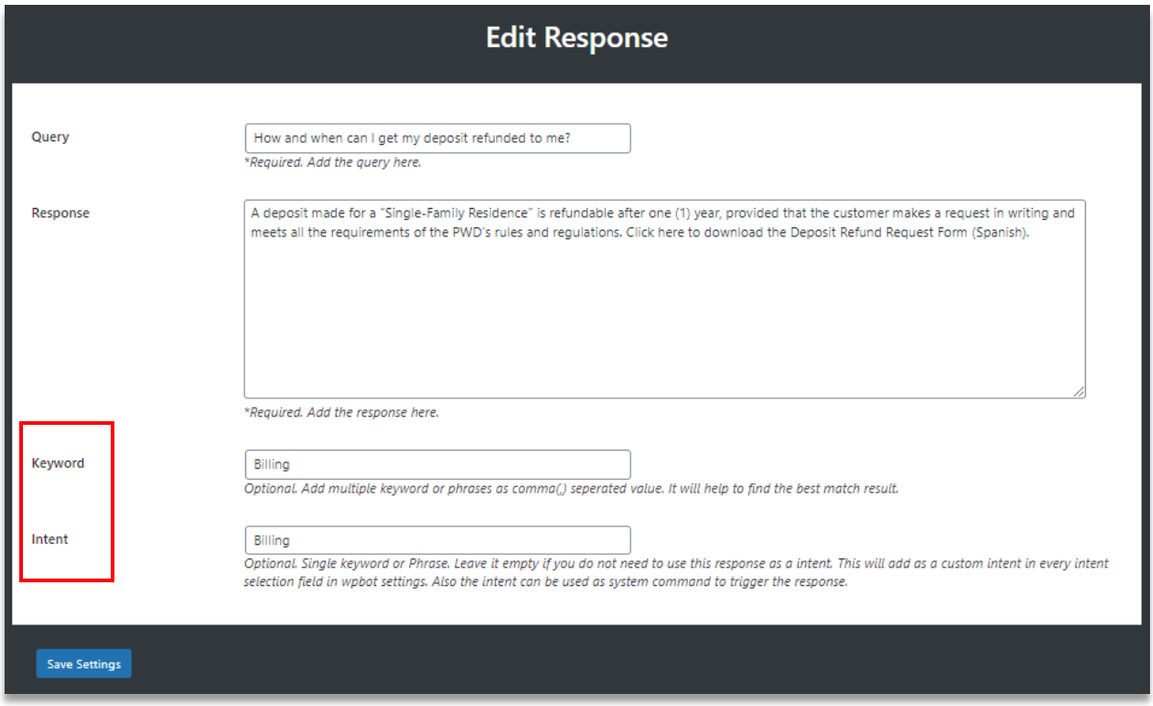
To "Add" a new FAQ and answer

Once your changes have been made click "Save Settings" and your chatbot will be updated.

A Great feature in Chatbot Pro is the ability to see, edit, and create simple text responses.

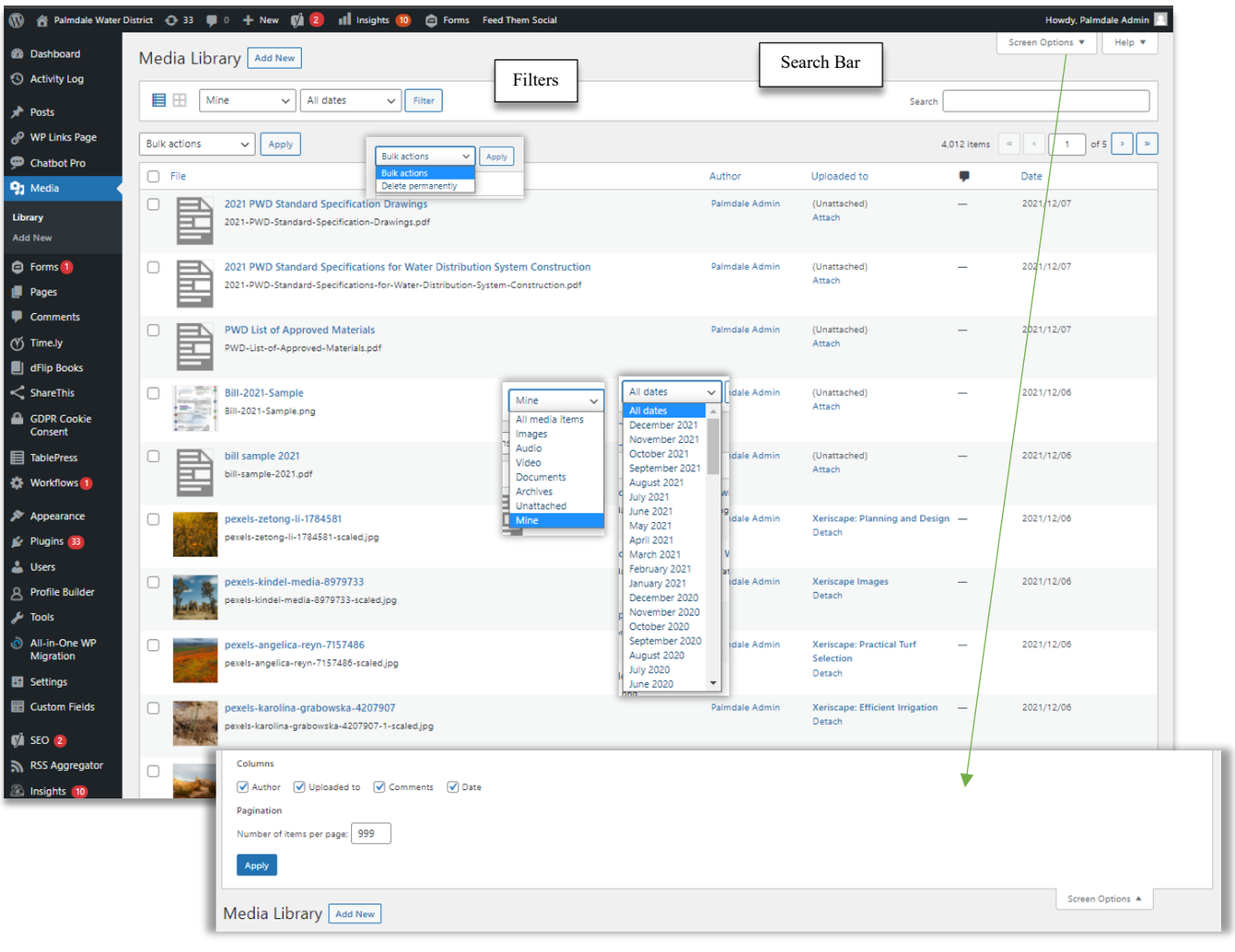


To Edit a FAQ and response from clicking the edit button. Make a note of the Keyword and Intent which will drive the customer inquiry to the correct FAQ answer.



Working with your Media Library

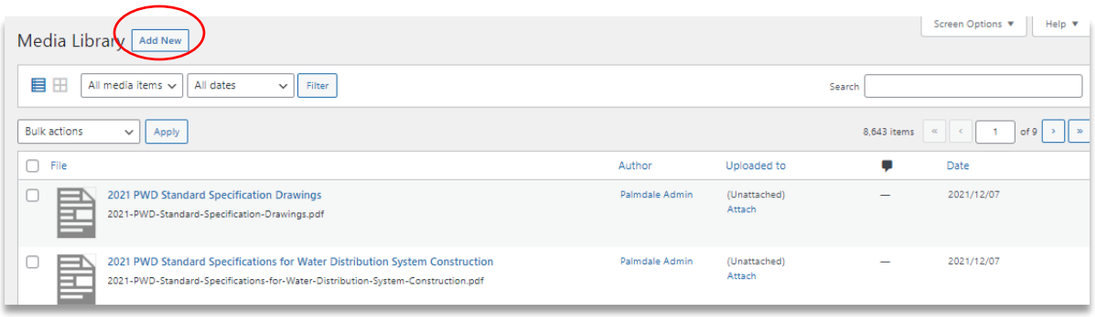
Your media library is your storage place for website's digital assets and the place that those assets are drawn from. Yor media library includes: Images, Audio & Video files, Documents, Archives, and Unattached files

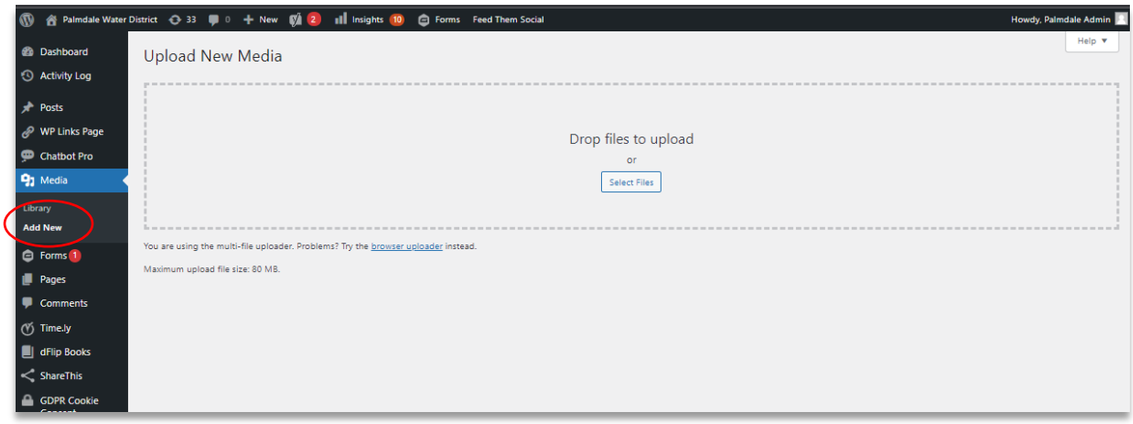


You can search through your Media Library via the Search bar and filter your library and search by media type and by dates.
By hovering over a file name you can Edit, Permanently Delete and view the asset.



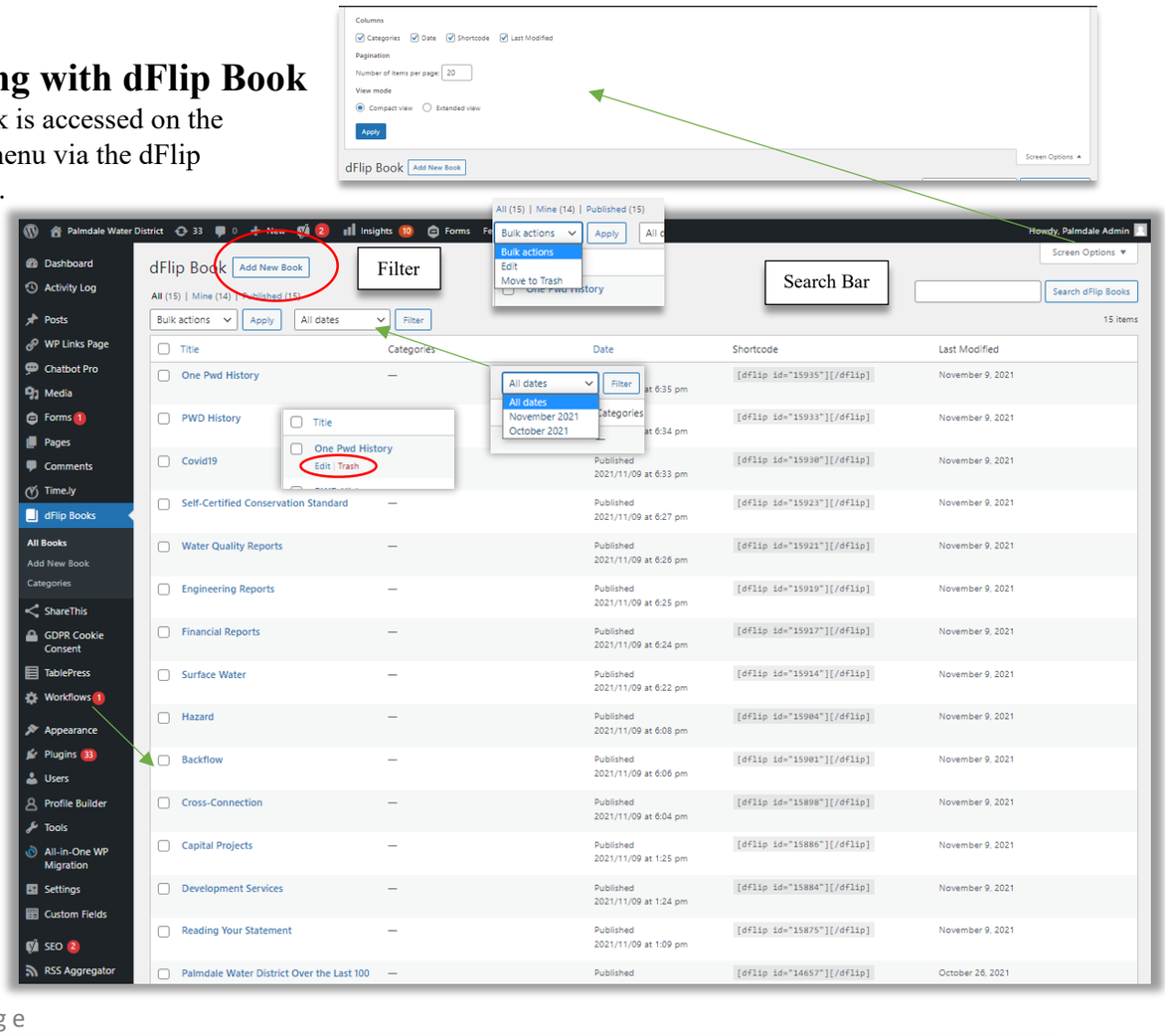
To Add to your Media Library – click on the Add New button at the top of the screen or via the Add New tab on the left bar. Once clicked, the Upload New Media page is displayed.
You can drag and drop a file or select a file to upload it to the library.





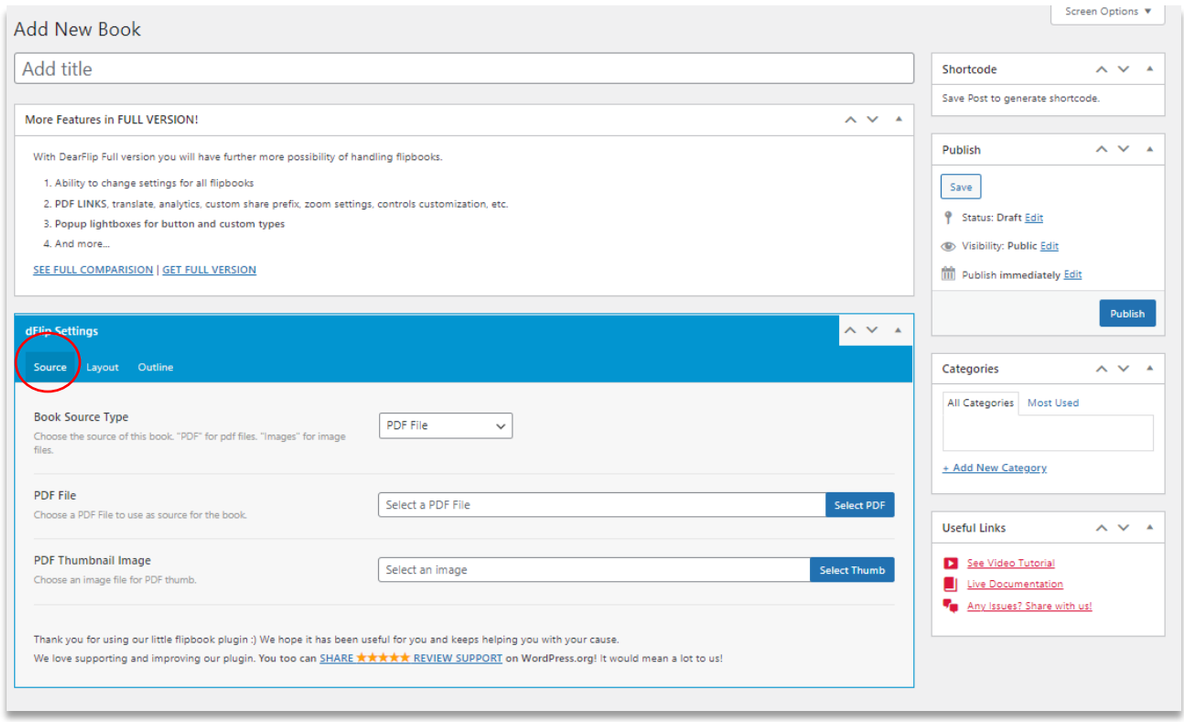
Working with dFlip Book

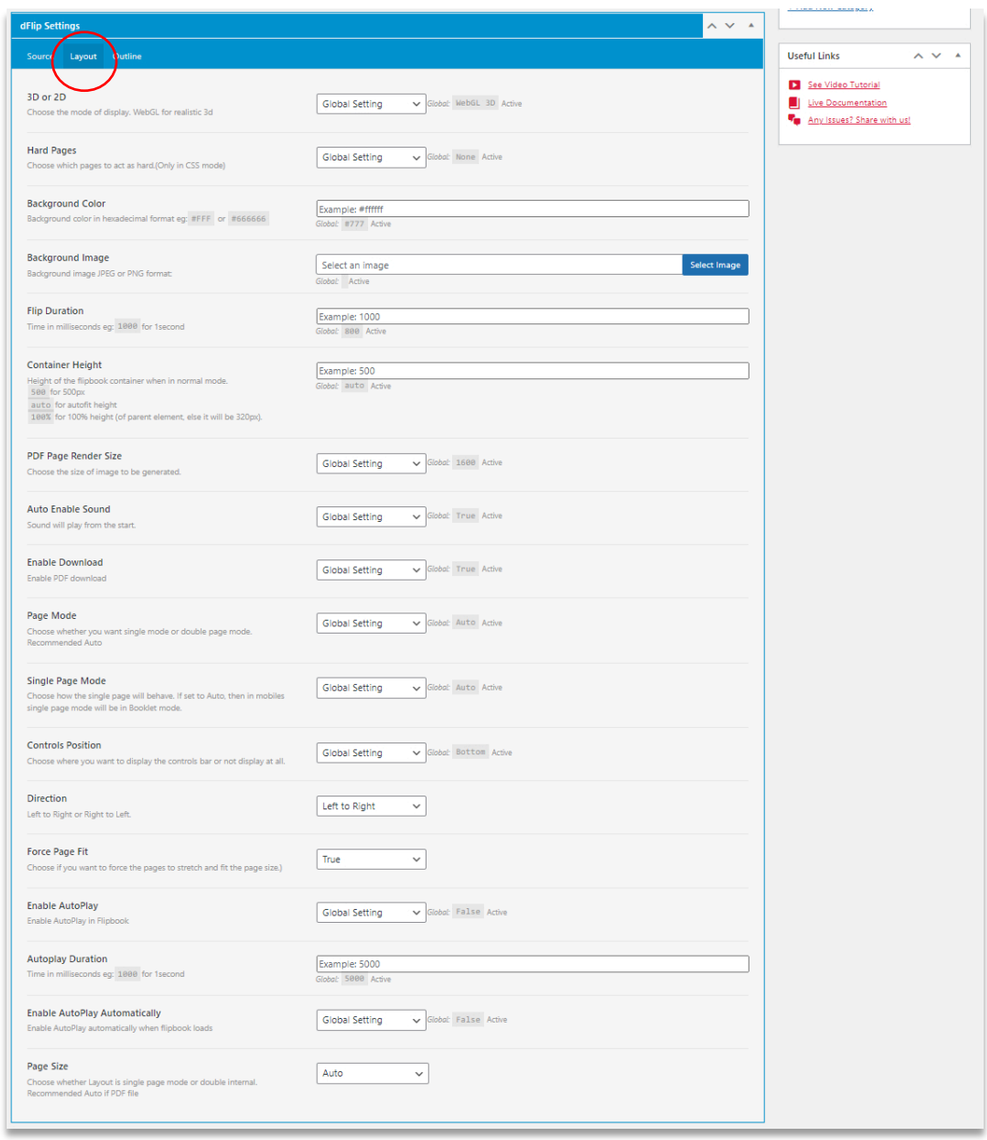
dFlip book is accessed on the left side menu via the dFlip Books tab.

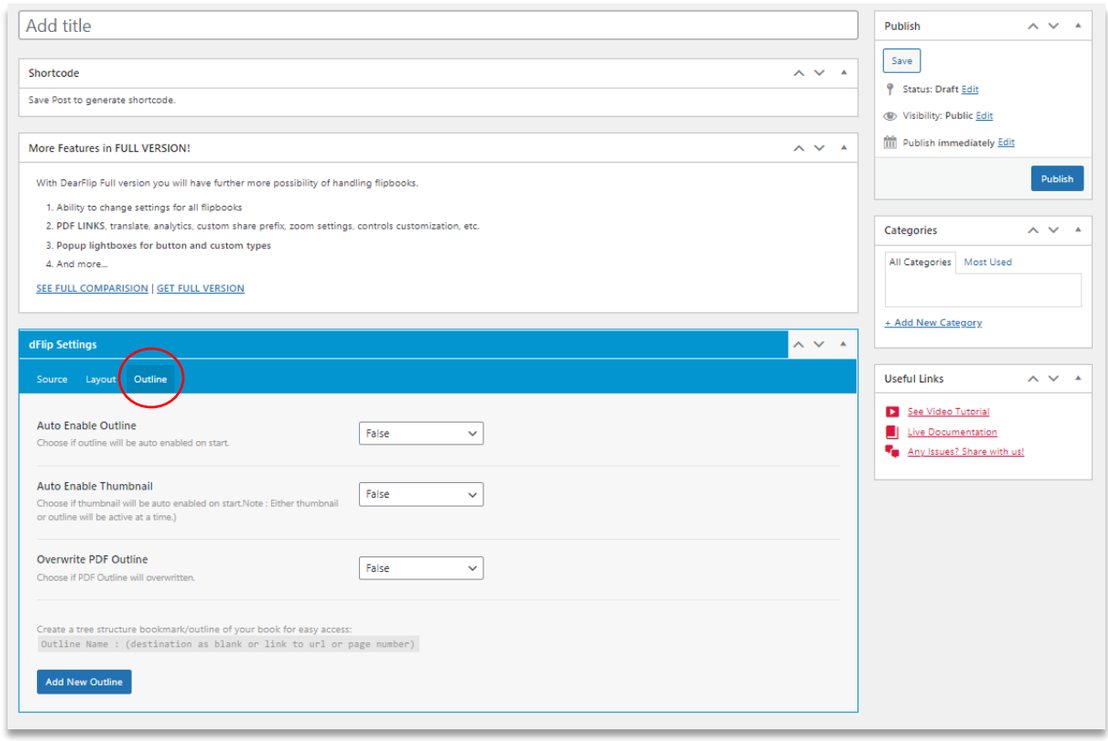


To Add a new dFlip Book you can either click on the Add New Book option on the main page or the Add New Book on the left side menu bar. The Add New dFlip book screen is shown below.

Note the available dFlip settings: Source, Layout, & Outline

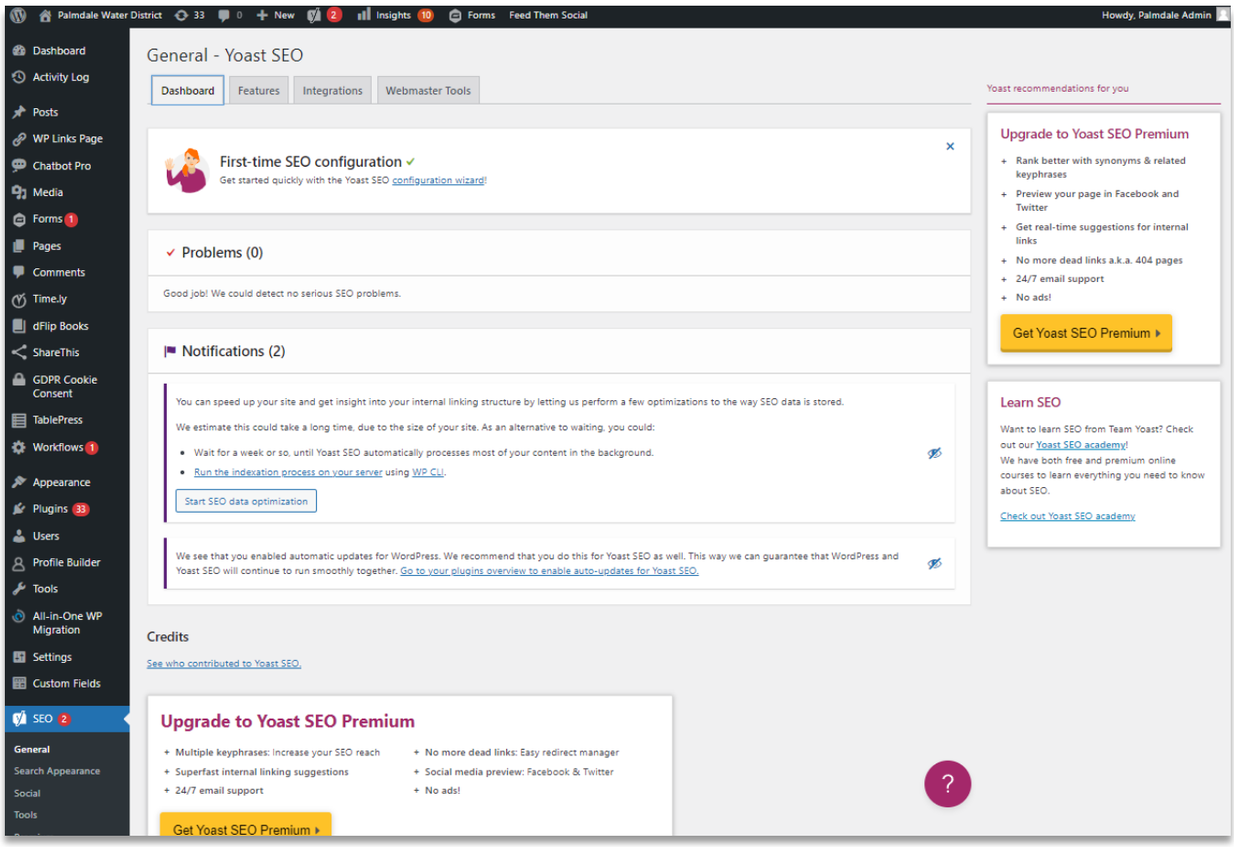






Working with Yoast SEO

Yoast SEO craws your site for SEO configuration issues, provides notifications and provides a SEO data optimization tool.

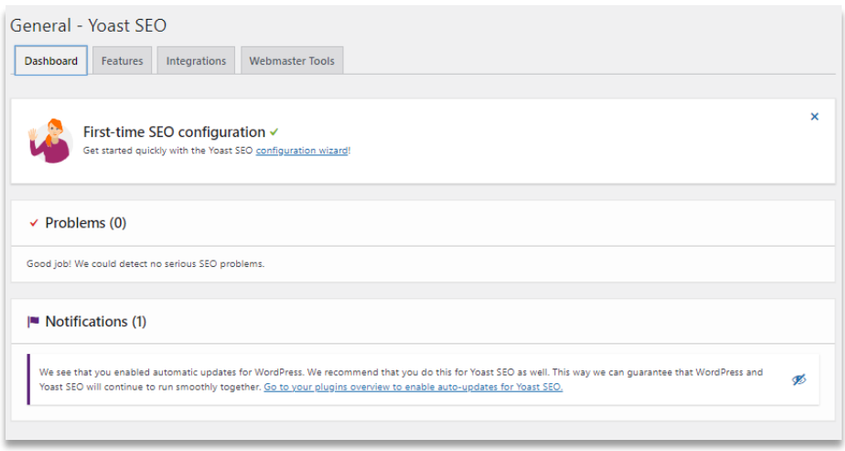


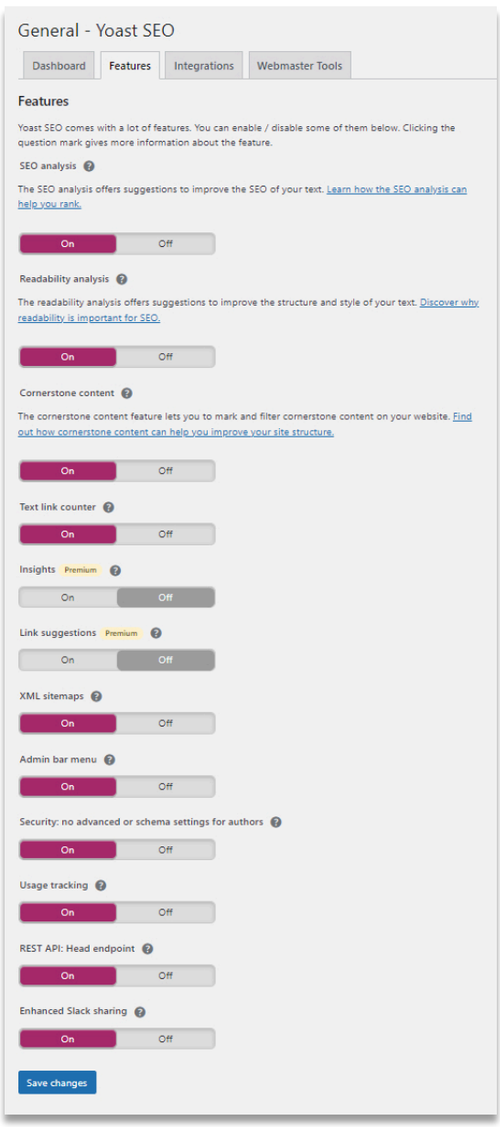
The standard tools built into this plugin include:

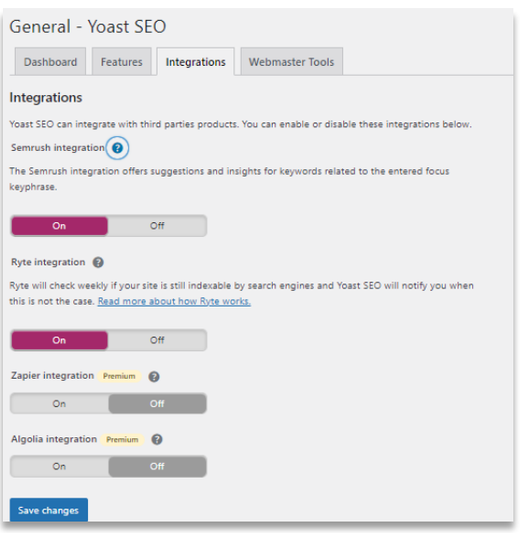
- ✓ **Import and Export**
  Import settings from other SEO plugins and export your settings for re-use on (another) blog.
- ✓ **File editor**
  This tool allows you to quickly change important files for your SEO, like your robots.txt and, if you have one, your .htaccess file **.**
- ✓ **Bulk editor**
  This tool allows you to quickly change titles and descriptions of your posts and pages without having to go into the editor for each page **.**
- ✓ **Optimize SEO Data**
  You can speed up your site and get insight into your internal linking structure by letting us perform a few optimizations to the way SEO data is stored. If you have a lot of content it might take a while, but it's worth it.

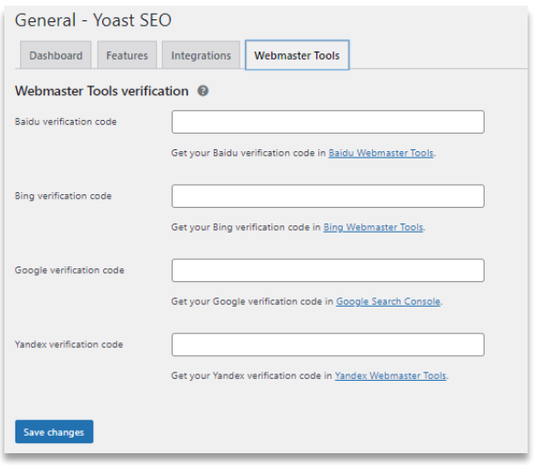
Yoast provides 4 functional areas.

1. Your Dashboard (highlights problems and notifications)
2. Features – added with a simple click on / off
3. Integrations
4. Webmaster Tools



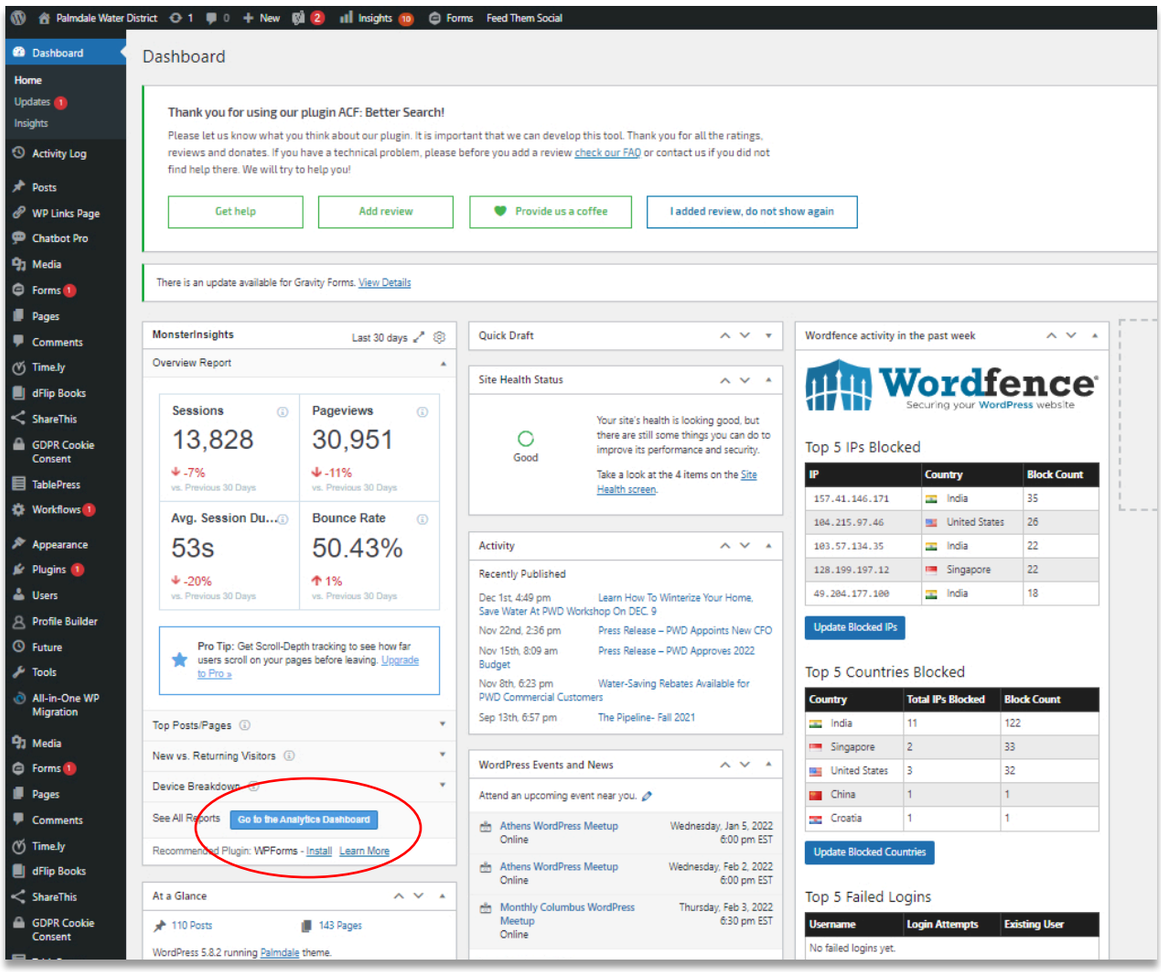




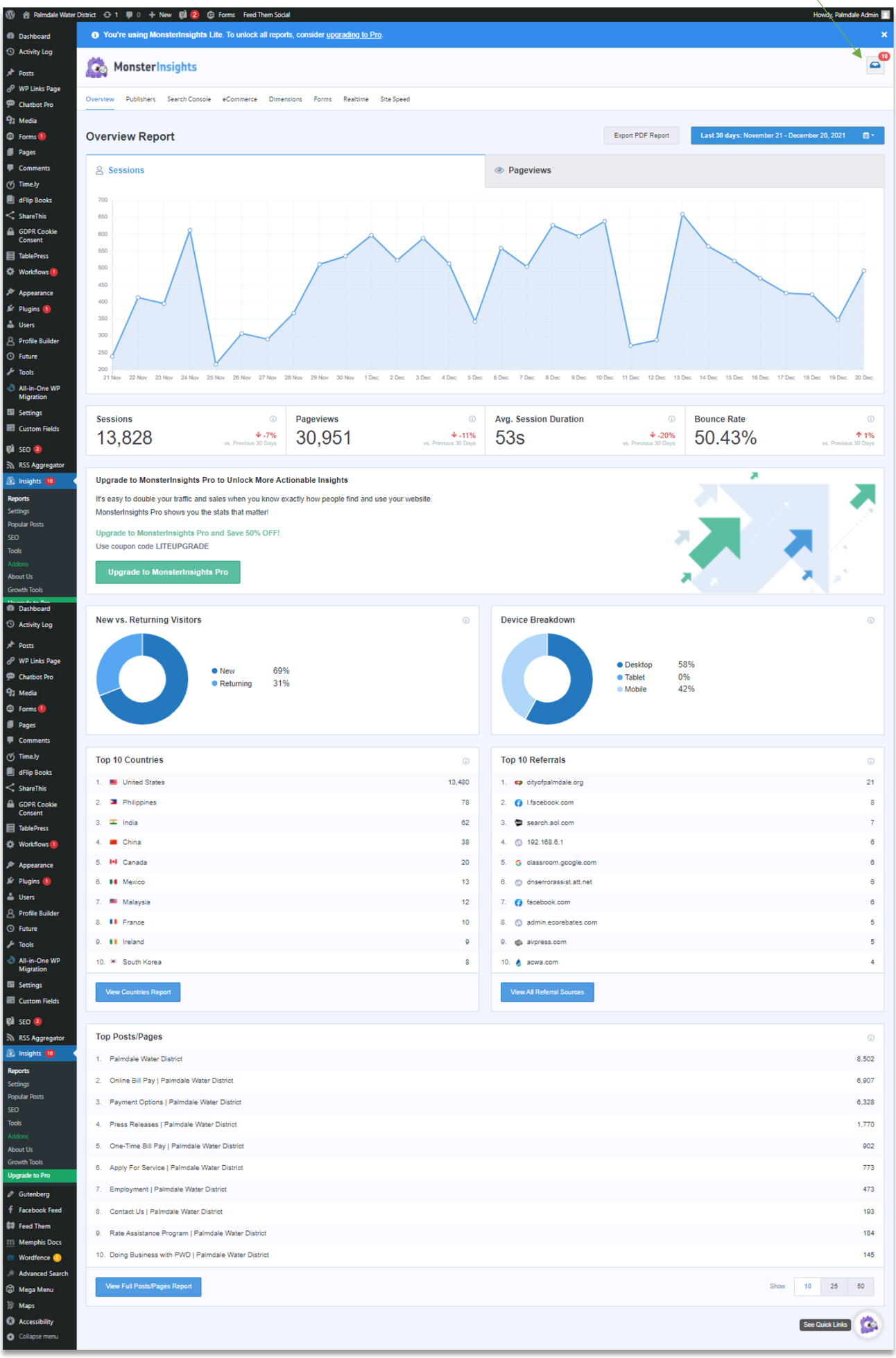


Monster Insights

Your new website comes with Monster Insights built in – accessible from your Dashboards home screen and analytics available from a CTA button on the home screen or via the Insights button on left menu bar.

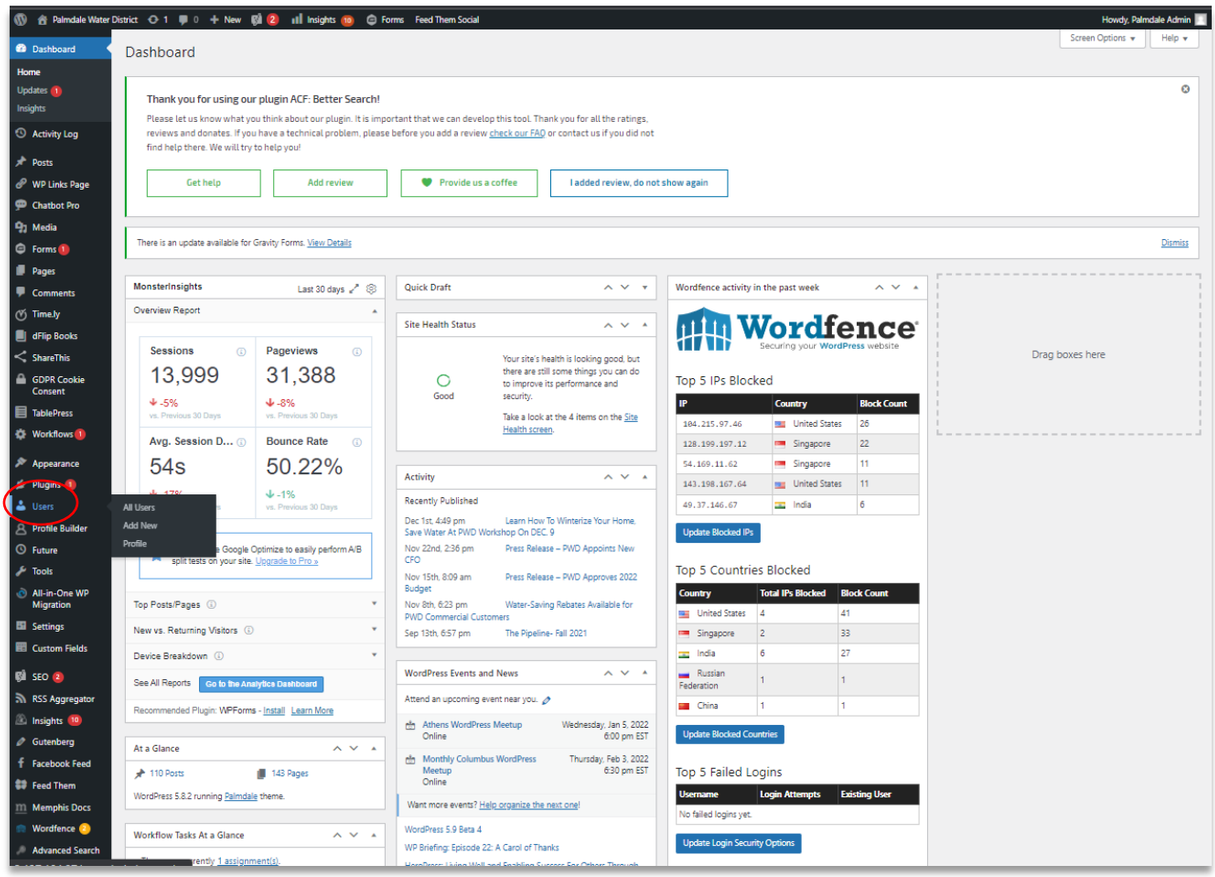


Insights News and suggestions

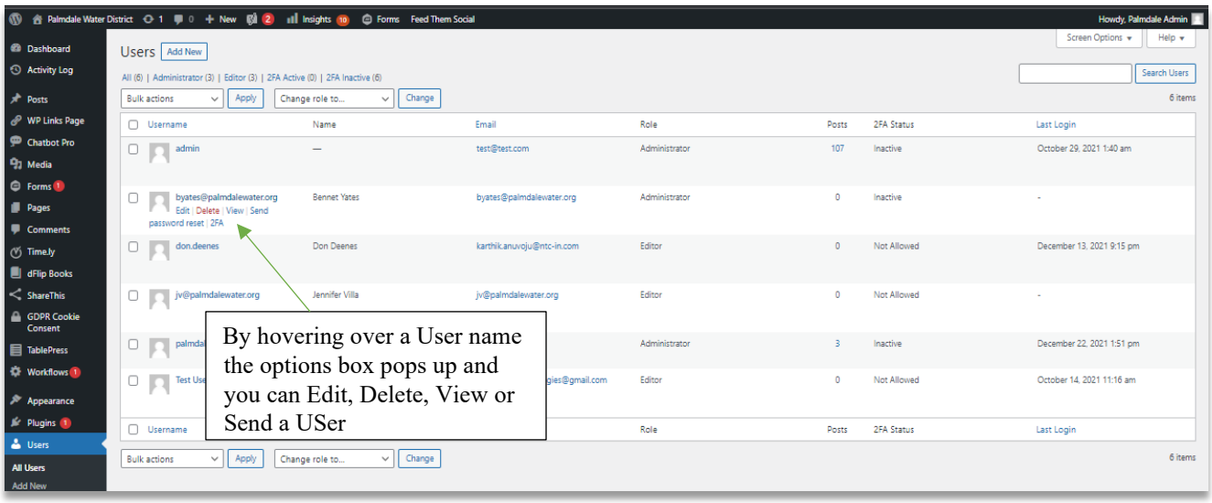


Adding / Editing a User

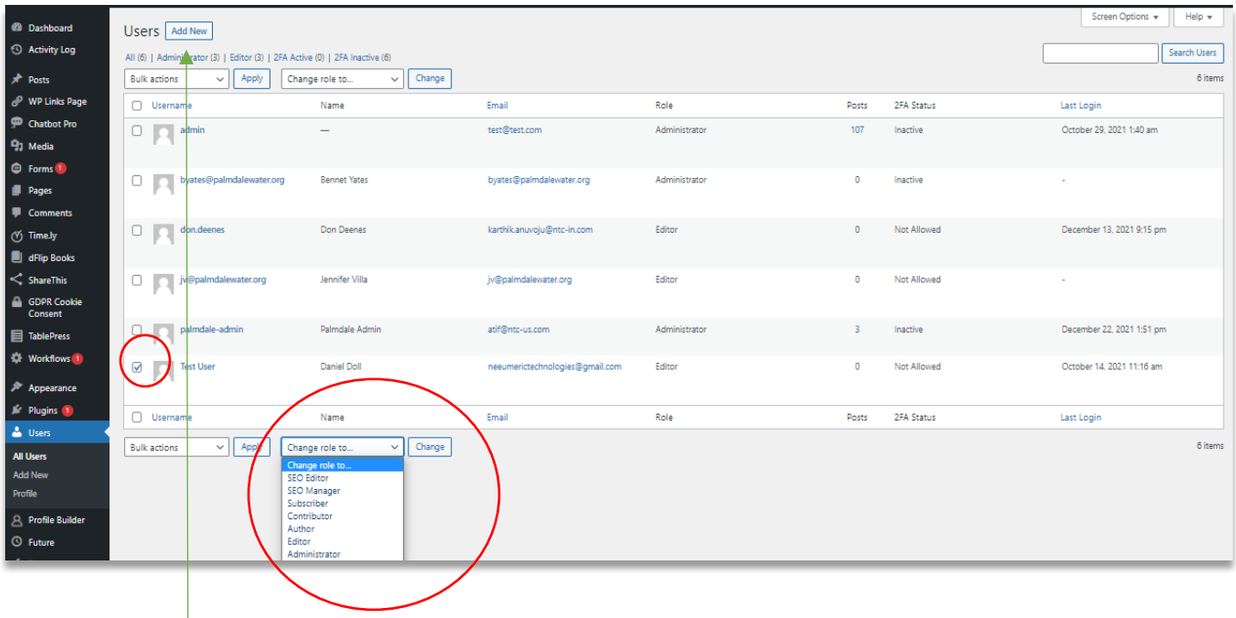
On the main Dashboard – scroll down on the left menu bar to Users, Click Users or by hovering over the Users name will provide the following options: All Users, Add New, Profile



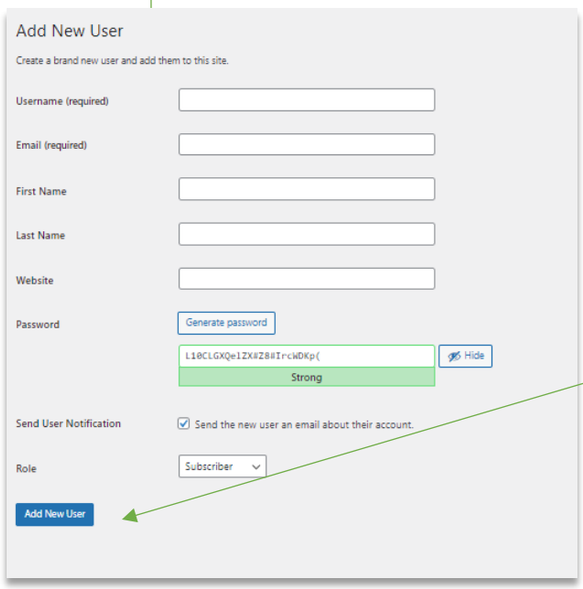
All Users shows the various Users with the backend access.



You can Change a User's role by clicking on the box to the left of the User Name, and using the drop down to assign a new role to that user. You can change multiple user roles by clicking on multiple User boxes and making the role change.



To Add a New User – Click on Add New . The following screen is displayed.

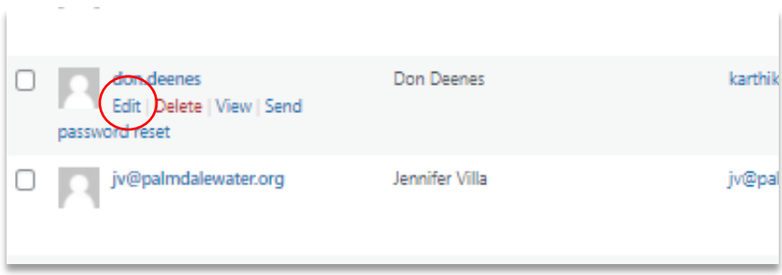


Fill in all of the data fields including the Users role. The Website box is not required.

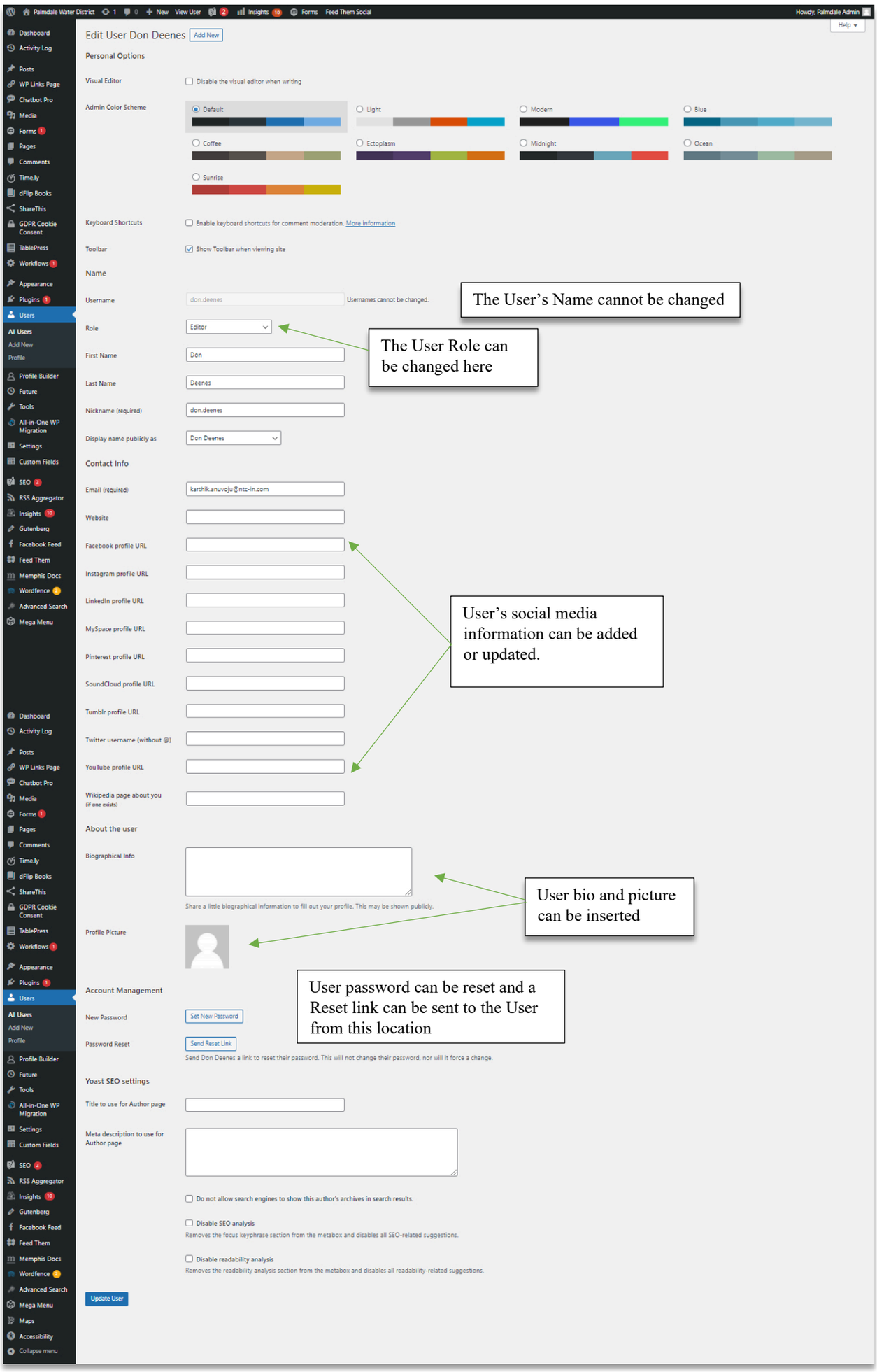
WordPress will generate a User password, we recommend that you generate a new password. Note the password so you can send it to the new User.

When finished – click Add New User.

To Edit a User: On the All Users page – hover over the User name and click on Edit



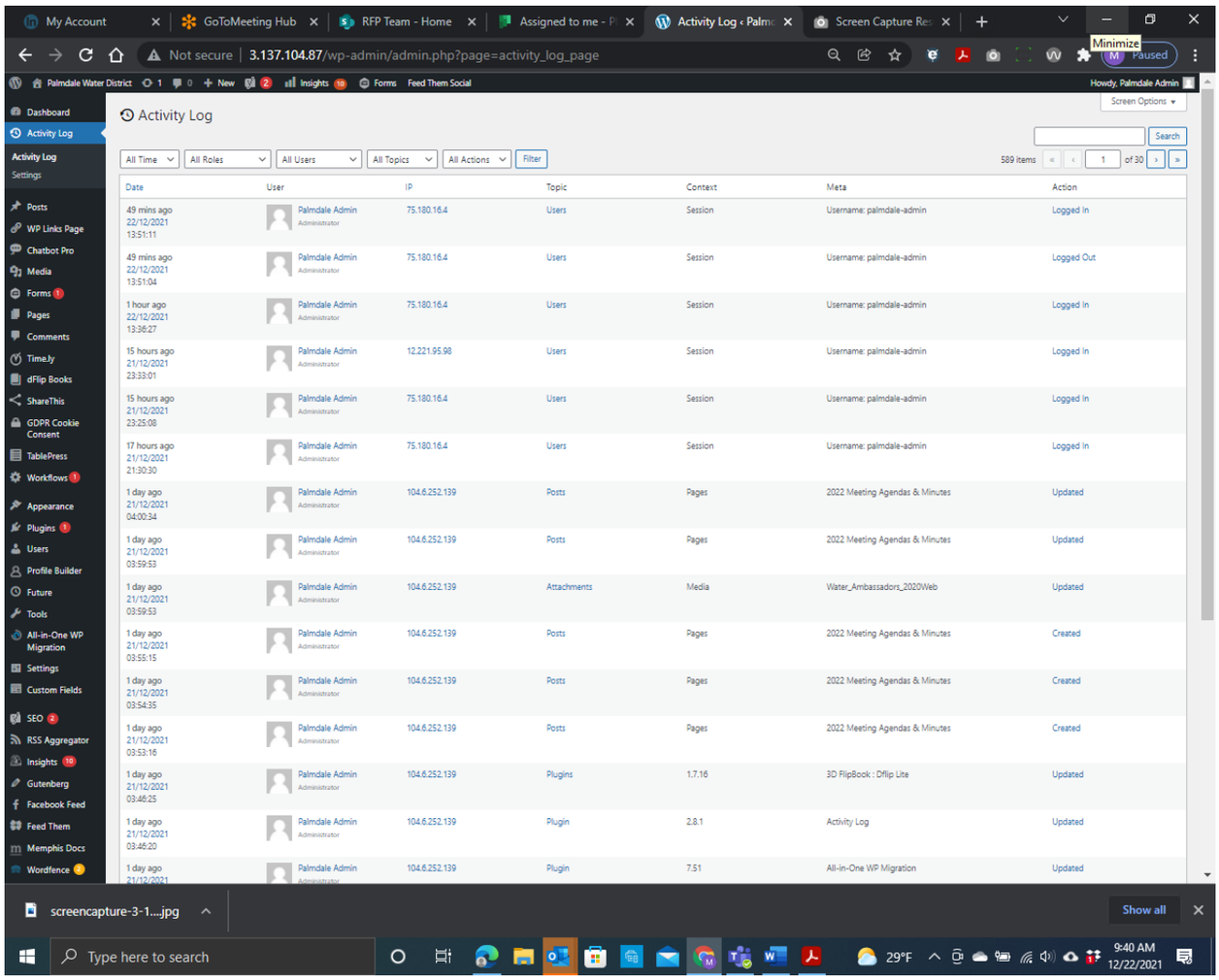
The following User edit screen will appear.



When all of the updates are complete – click the Update User button.

Reviewing your Activity Log (for your Webmaster)

The Activity log details all users and their activities on the website's backend.



There are a variety of filters and actions to review the Activity Log.

