

# IEEE SA WordPress

## User Guide

April 2020

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# 1. Introduction

## What is WordPress?

**WordPress** is an online, open source website creation tool.

- A tool used by Standards Committee and Working Groups to help promote a project.
- A public facing web page that provides information on a specific project to gain interest in participants and to keep them up-to-date on the project.

## In order to use WordPress, you must have the following:

- Internet Access
- Web browser ( Internet Explorer, Firefox, Google Chrome etc.)
- WordPress login <https://sagroups.ieee.org/loginhere>

Note: If you do not have a WordPress login, you will be provided with one at the time of your WordPress site request. Your login will be an Administrator User.

\*Please see user role definitions on page 24.

# 2. Request a WordPress Site

To request a WordPress Site for a Working Group and/or committee,

1. Go to the [Web Hosting Request](#) site
2. Enter your First and Last name
3. Enter your Email address
4. Enter the Full name of the Working Group
5. Enter the requested website URL (see example of form on the next page)

**Note:** Do not use a P in front of the project number (P7000)  
Do not use P7000.1, P70001 for P7000.1 , instead use 7000-1

New Site - Address	<a href="https://sagroups.ieee.org/">sagroups.ieee.org/</a>
	7000-1

6. Click Submit

### Web Hosting Request

**Name \***

First  Last

**Email \***

**SA Working Group Name \***

**Requested Website URL: \***  
For example, IEEE-SA P1920.1 Working Group's URL would be <https://sagroups.ieee.org/1920-1/> (No dots)

**Your Message**

Please add Thomas Cox <[email](mailto:email)> as the admin to this page.

When you're done, click submit button

**For Staff:** Your request is sent to [ccc-contact@ieee.org](mailto:ccc-contact@ieee.org). Once completed, you will be notified by the SA WordPress staff through email. If a volunteer requests a site, you will need to forward the web hosting request form email to [ccc-contact@ieee.org](mailto:ccc-contact@ieee.org) noting you approve the request and to add the requestor as an admin to the site. You can also contact the SA WordPress staff to add you as an admin to the site the volunteer has requested.

Please note: In the absence of the SA WordPress staff, you will need to forward the web hosting request form email to Luigi Napoli <[l.napoli@ieee.org](mailto:l.napoli@ieee.org)> .

**For Volunteers:** If a volunteer requests a site, the web hosting request form is sent to [ccc-contact@ieee.org](mailto:ccc-contact@ieee.org). Forward that email to the SA WordPress staff (Adrien Barmaksiz <[a.barmaksiz@ieee.org](mailto:a.barmaksiz@ieee.org)>) stating that you approve the request and to add the requester as an admin to the site.

WordPress site creation can take up to 5 business days.

## Example of the WordPress Hosting Request Email

### New submission from IEEE SA Group Hosting Request Form

#### IEEE SA Program Managers

to ccc-contact ▾

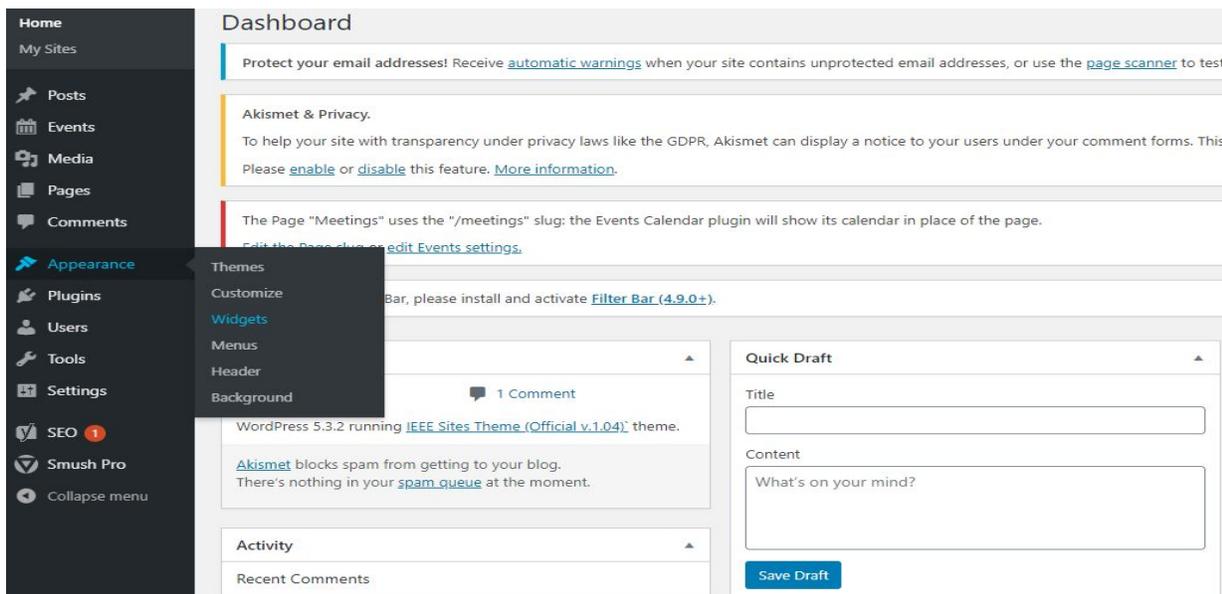
Dear Jonathan Goldberg

You have submitted the following information at <https://sagroups.ieee.org/web-hosting-request/>:

<b>Name</b>
Jonathan Goldberg
<b>Email</b>
<a href="mailto:goldberg.j@ieee.org">goldberg.j@ieee.org</a>
<b>SA Working Group Name</b>
Organizational Governance of AI Working Group
<b>Requested Website URL:</b>
<a href="https://sagroups.ieee.org/2863">https://sagroups.ieee.org/2863</a>

## 3. Dashboard

The dashboard is the first screen you will see when logging in. It provides you quick access to edit your page(s).



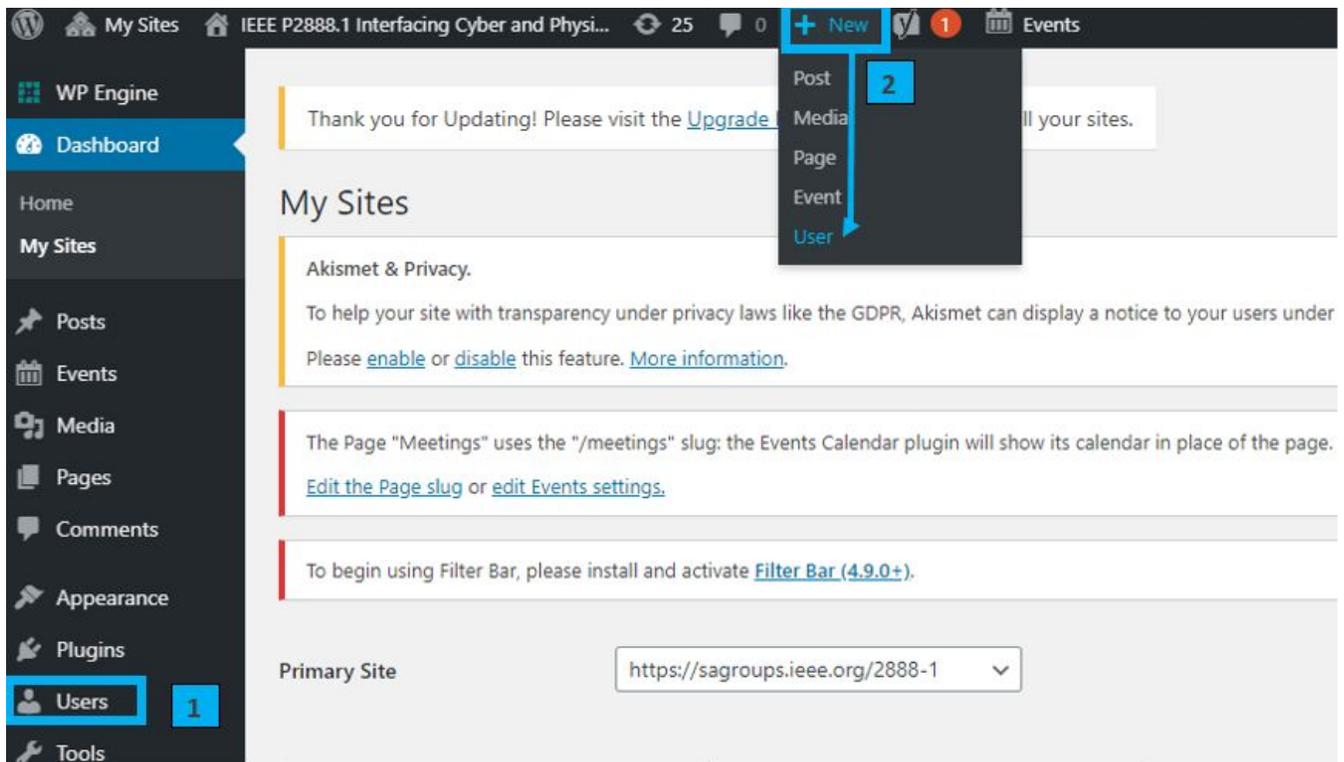
## 4. Add a user

### Applicable Users:

-Administrator users

### Instructions:

1. There are two ways to add a user. On the left side bar, mouse over Users (1) and click Add New or hover over New (2) and click User.



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2. Scroll down until **Add New User**, enter required username and email address.  
Note: First initial and Last name should be the username (no space)
3. From the **Role** drop down menu, select a role.
4. Click **Add New User**. The user will receive a link with instructions to login.

**Add New User**

Create a brand new user and add them to this site.

Username (required)

Email (required)

Role  ▼

Skip Confirmation Email  Add the user without sending an email that requires their confirmation.

**Add New User**

Administrator role access (commonly used) enables users to edit all pages.

## 5. Edit the WordPress Site

### 5.1 Naming your WordPress Site

#### Applicable Users:

-Administrator users

When you login, you will see your site next to My Sites. The name for all new sites will appear as IEEE Standards Association.

#### Instructions:

1. In order to change the site title, click on **Customize** at the top.

\*If you do not see Customize, mouse over IEEE Standards Group (fig.1) and click on **Visit site**. Now you will see **Customize** (fig.2) at the top.

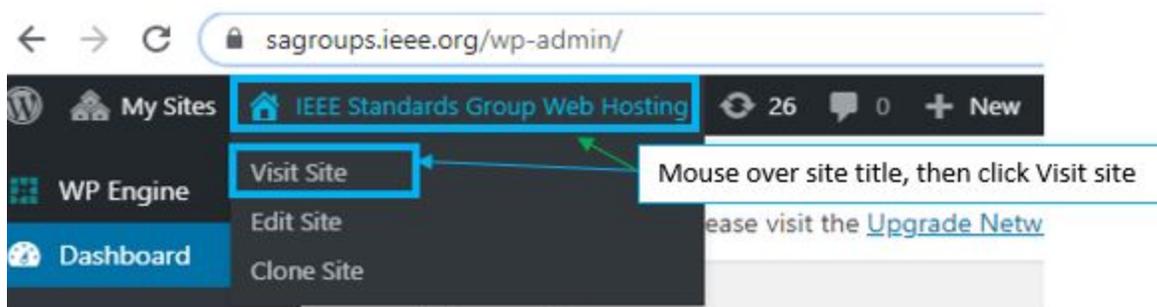


Fig. 1

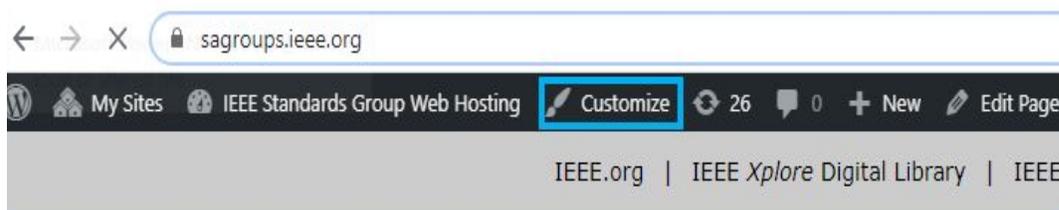
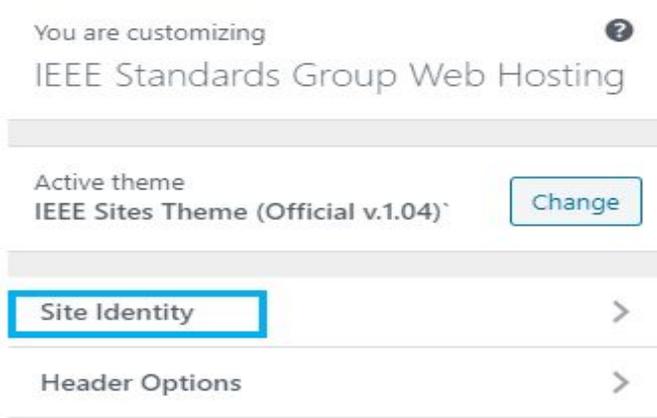
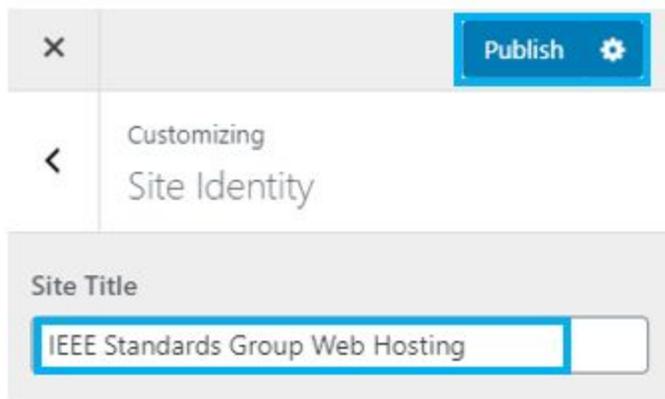


Fig. 2

2. On the left side bar, click on **Site Identity**



3. Change the Site Title field to the working group or committee name.



4. Click on **Publish** at the top when finished.

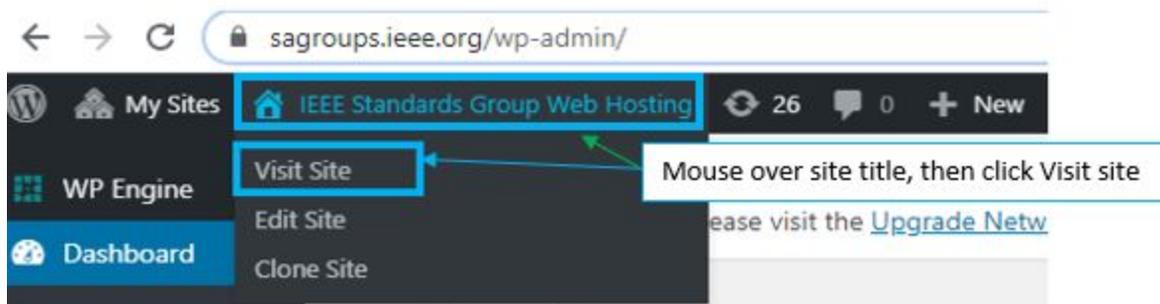
## 5.2 Editing the Home Page

To edit the Home page, you want to make sure you are on the home screen that has the links shown below



### Instructions:

1. To get there, mouse over the site title, a drop down menu will appear. Click on **Visit Site** for the site you want to edit.



2. Click on **Edit Page**



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3. The following information should be on this page:

- Working Group or Standards Committee Scope
- Link to policies and procedures
- Link to private web pages; iMeet or Grouper (if applicable)

4. When you are done making your changes, click the Update button

The screenshot shows the WordPress 'Edit Page' interface. The title field is empty. The content area contains a paragraph about the IEEE P7000 standard and a list of links. The right sidebar shows the 'Publish' section with an 'Update' button highlighted by a blue arrow.

**Edit Page** Add New

IEEE P7000 - Engineering Methodologies for Ethical Life-Cycle Concerns Wo

Permalink: <https://sagroups.ieee.org/7000/>

Add Media

Visual Text

Paragraph B I [List Icons] [Link Icon] [Table Icon] [Image Icon]

**Scope:** The standard establishes a process model by which engineers and technologists can address ethical consideration throughout the various stages of system initiation, analysis and design. Expected process requirements include management and engineering view of new IT product development, computer ethics and IT system design, value-sensitive design, and, stakeholder involvement in ethical IT system design.

- Additional information can be found on the approved [PAR](#).
- [Document Repository](#) (members only)

Subs: [ieee-sa.imeetcentral.com/7000-emelc-wg](http://ieee-sa.imeetcentral.com/7000-emelc-wg) [Edit Icon] [Trash Icon]

**Publish**

Preview Changes

Status: **Published** Edit

Visibility: **Public** Edit

Revisions: 4 Browse

Published on: Nov 15, 2015 at 04:02 Edit

Readability: Needs improvement

SEO: Not available

Move to Trash Update

**Page Attributes**

Parent

(no parent)

Note: "Enter title here" should be left blank.

### 5.3 Adding Working Group Officers

The WG Officers information on the Home page will need to be updated.

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#### WG Officers

**Chair**

Name 1, email@email.com

**Vice Chair**

Name 2, email@email.com

**Secretary**

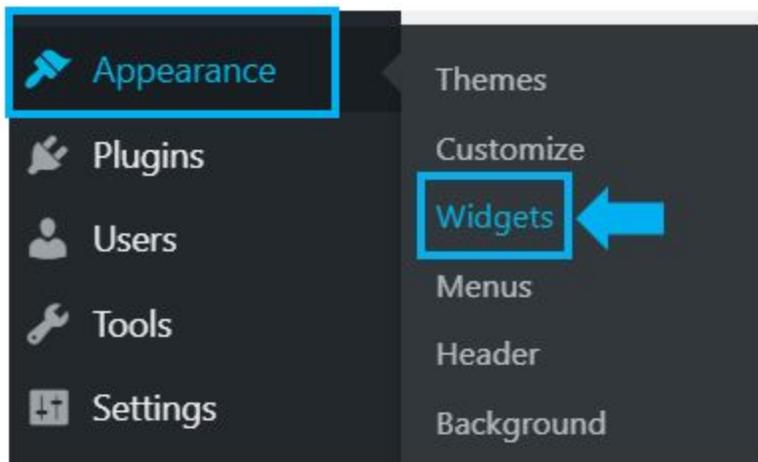
Name 3, email@email.com

**Staff Liason**

Name 4, email@email.com

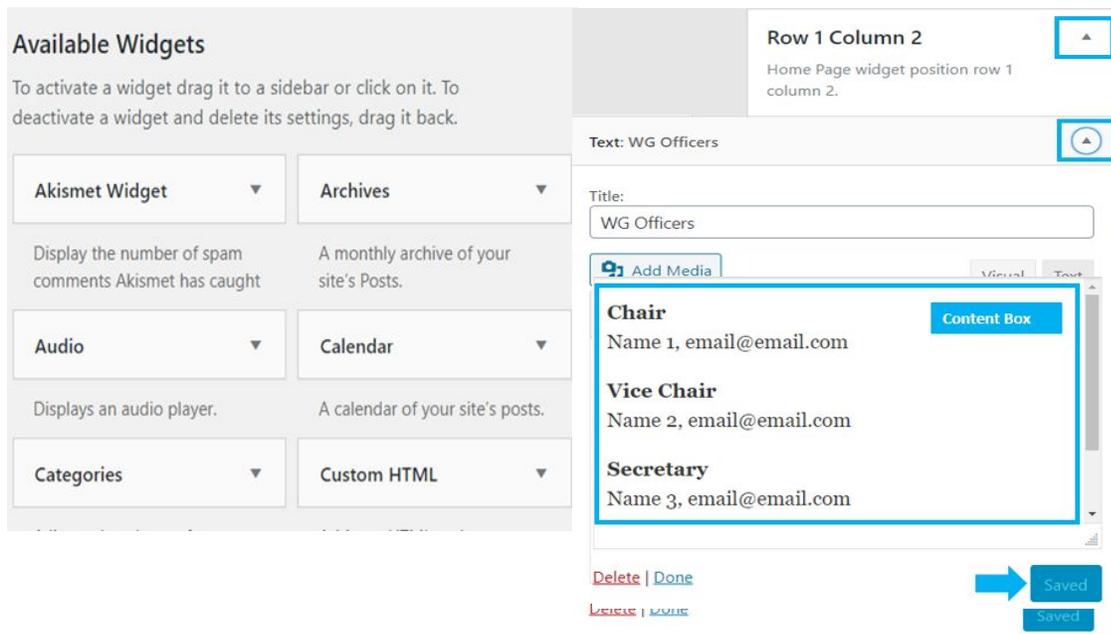
**Instructions:**

1. Click on **Edit Page**
2. On the left side bar, click on **Appearance**
3. Then click on **Widgets**



4. On the Widgets page, click on Row 1 Column 2.

5. Then click on the Text: WG Officers, this will open it up.

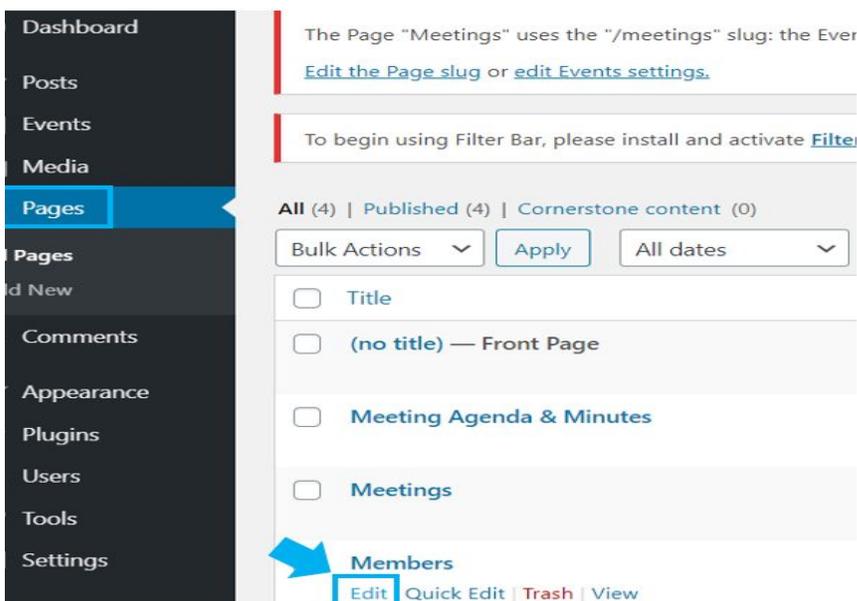


6. Make your edits in the content box and click on Save.

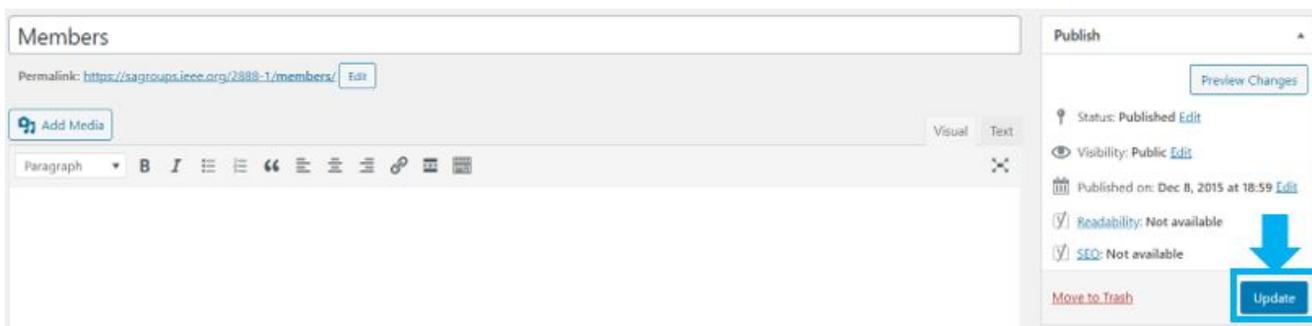
## 5.4 Editing the Members Tab

### Instructions:

1. To edit the Members page, click on **Pages** and click the **Edit** button.



2. Make your changes and click the **Update** button.

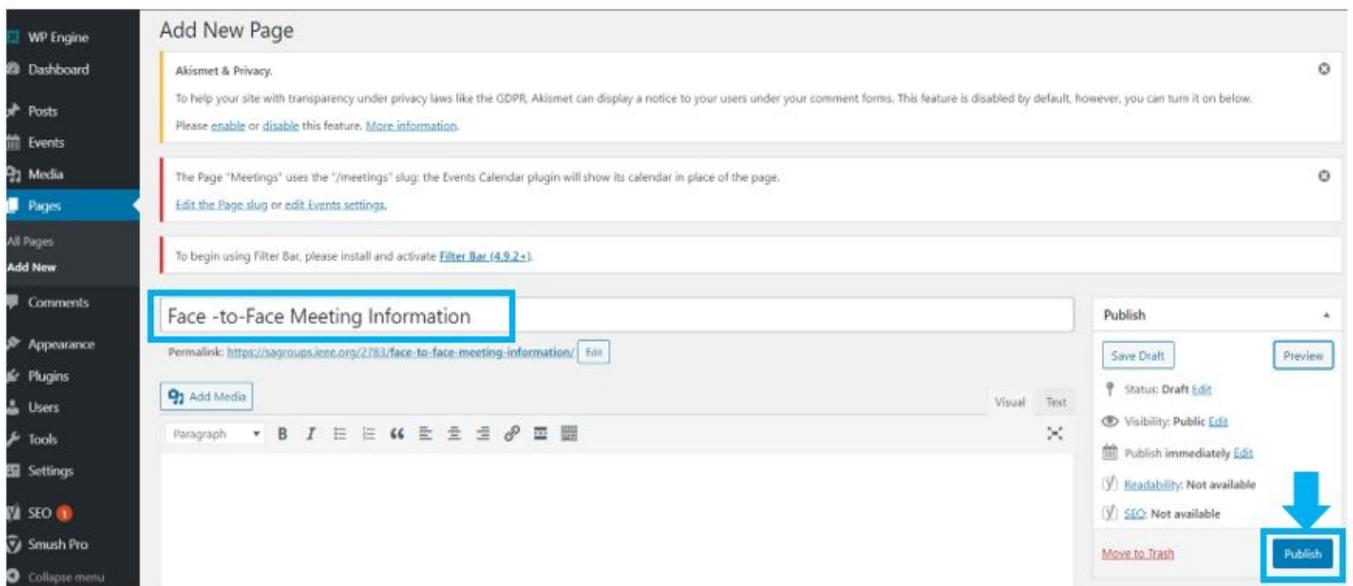


**\*\*Please review clause 4.6 Working Group Membership Public List of the baseline individual or entity working group policies and procedures to ensure the correct information is posted.**

## 5.5 Adding / Deleting a Tab

### Instructions to ADD a tab:

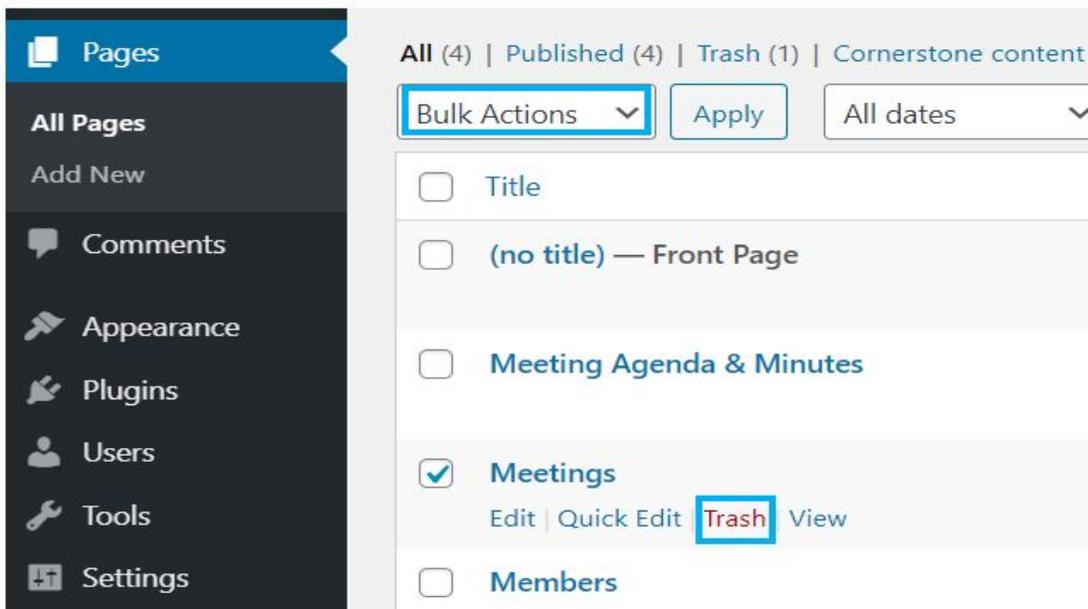
1. From the Dashboard screen on the left, click/mouse over **Pages**.
2. Click **Add New** button.
3. Enter a title for the new tab and click on **Publish**.



Note: You can view your site and see that the new tab has been created.

Instructions to DELETE a tab:

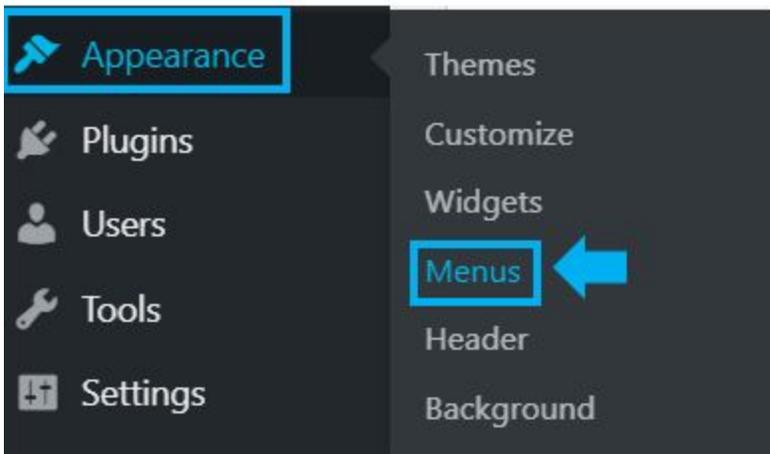
1. From the Dashboard screen on the left, click **Pages**.
2. There are two ways to delete a tab:
  - Check the box on the left of the tab you would like to delete, in the **Bulk Actions** drop menu, select **Move to Trash** and click **Apply**.
  - Mouse over **Meetings** and click **Trash**



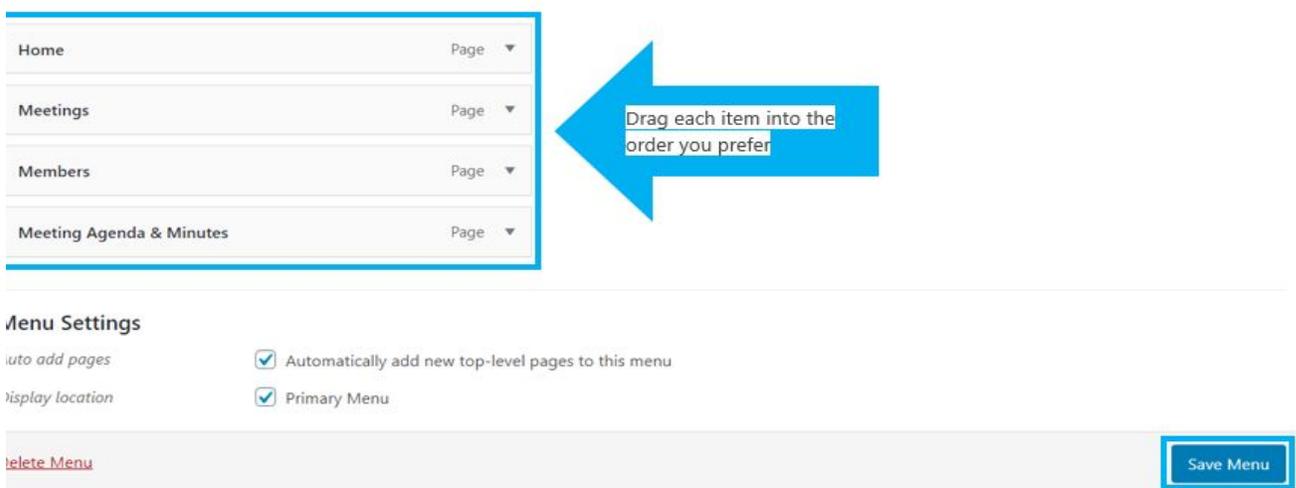
## 5.6 Reordering a Tab

### Instructions:

1. From the Dashboard on the left, click on **Appearance**, then click **Menus**.



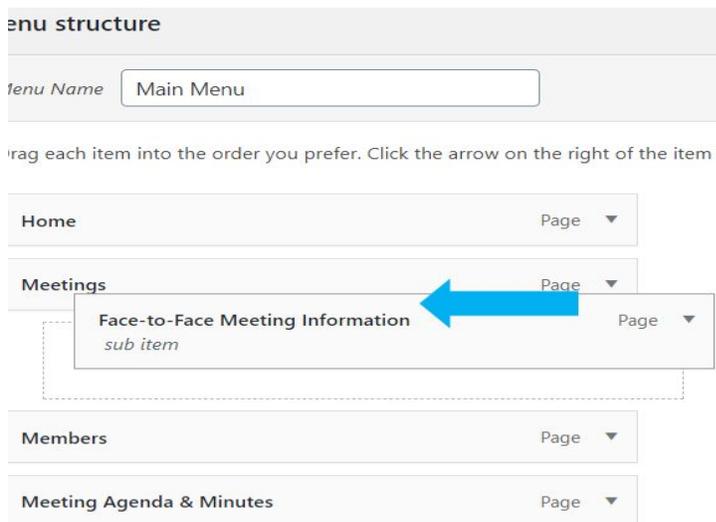
2. Mouse over the tab you want to move until you see the cross arrow symbol.
3. Click on the tab and drag up / down until it's in the order you want it.
4. Click on **Save Menu**.



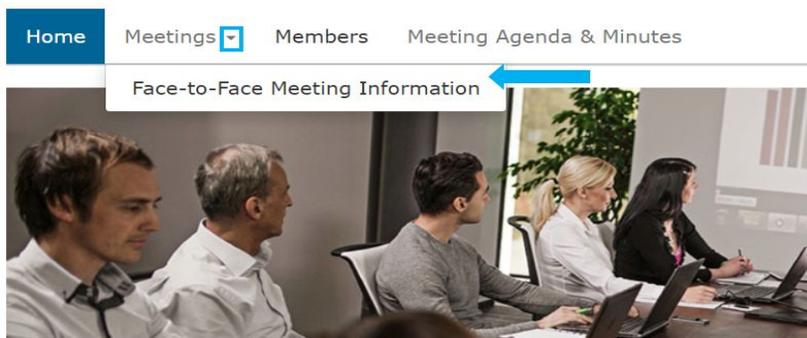
## 5.6 Reordering a Tab

You can also move a tab to open up within another tab. You can do this from the Menu screen.

1. With your mouse, hover over the tab you want to move until you see the cross arrow symbol.
2. Click on the tab and move it on top of the tab you want it to open up under.
3. Click on **Save Menu**.



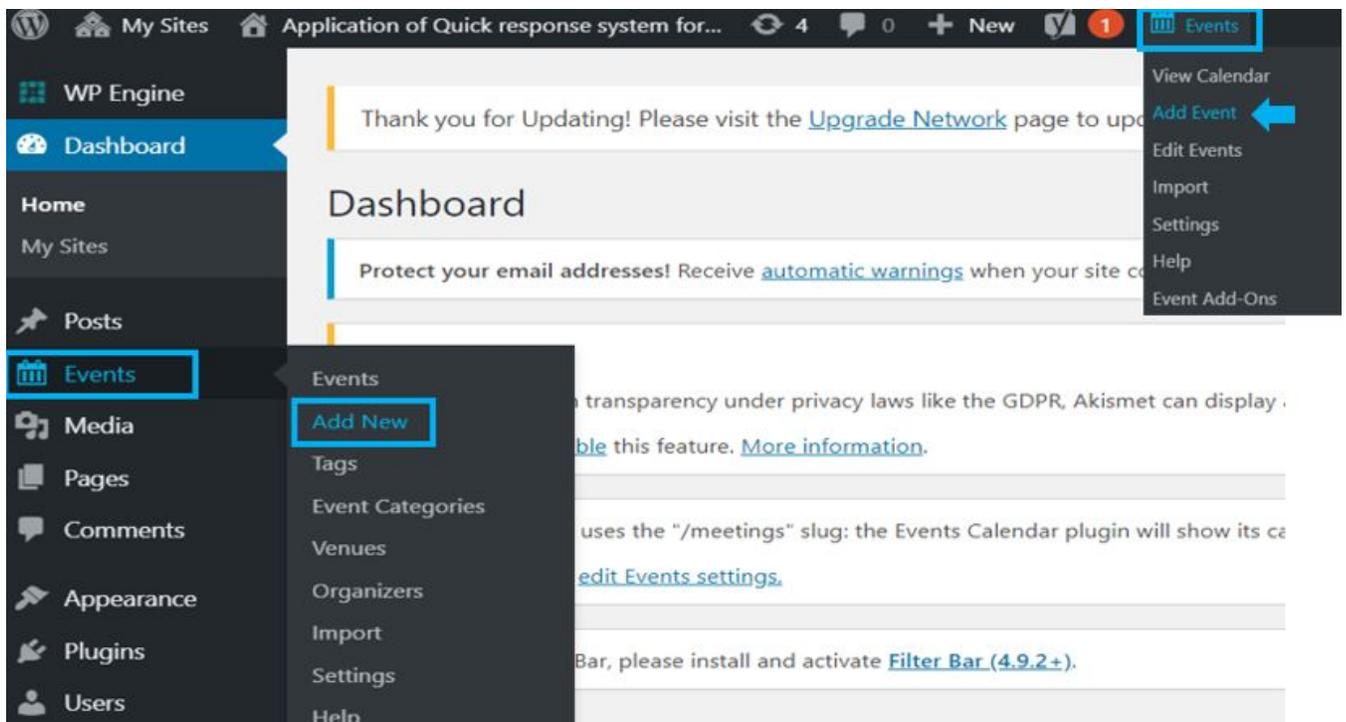
When you get to your page, you will see a down arrow next to the tab you placed the sub tab.



### 5.7 Adding a Meeting

#### Instructions:

1. From the Dashboard screen, there are two ways to add an event.
  - On the left bar, mouse over **Events** then click **Add New**.
  - On the top bar, mouse over **Events** then click **Add Event**.



2. Once you click **Add New/Add Event**, on this page, enter meeting details:
  - Title
  - Time and Date
  - Location
  - Organizer Contact Info
  - Event Website

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**Add New Event**

To begin using Filter Bar, please install and activate [Filter Bar \(4.9.2+\)](#).

**Add title** Name of the Meeting

**Enter description here (if applicable)**

**The Events Calendar**

**TIME & DATE**

Start/End: 3/10/2020 8:00am to 5:00pm 3/10/2020 Time Zone: UTC+0

All Day Event

*This event is from 8:00am to 5:00pm on 2020-03-10.*

Event Series: [Schedule multiple events](#)

**LOCATION**

Venue:

Venue Name:

Address:

City:

Country:

State or Province:

Postal Code:

Phone:

**Publish**

Save Draft Preview

Status: Draft [Edit](#)

Visibility: Public [Edit](#)

Publish immediately [Edit](#)

Readability: Not available

SEO: Not available

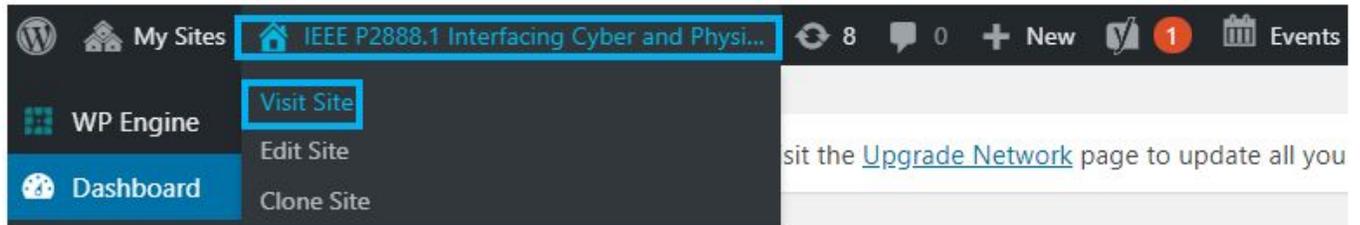
[Publish](#)

2. Click on **Publish** after you have added the event.

## 5.8 Adding a Meeting Agenda & Minutes

### Instructions:

1. To add a meeting agenda and/or minutes, mouse over **Site Title** at the top of the page, then click **Visit Site**.

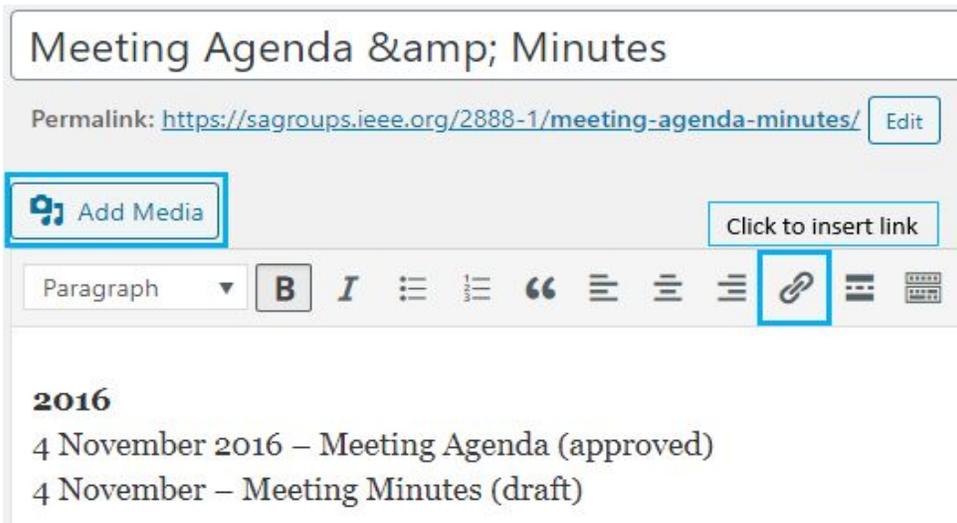


2. On the page, click **Meeting Agenda & Minutes** tab, then click **Edit** button at the bottom of the page.

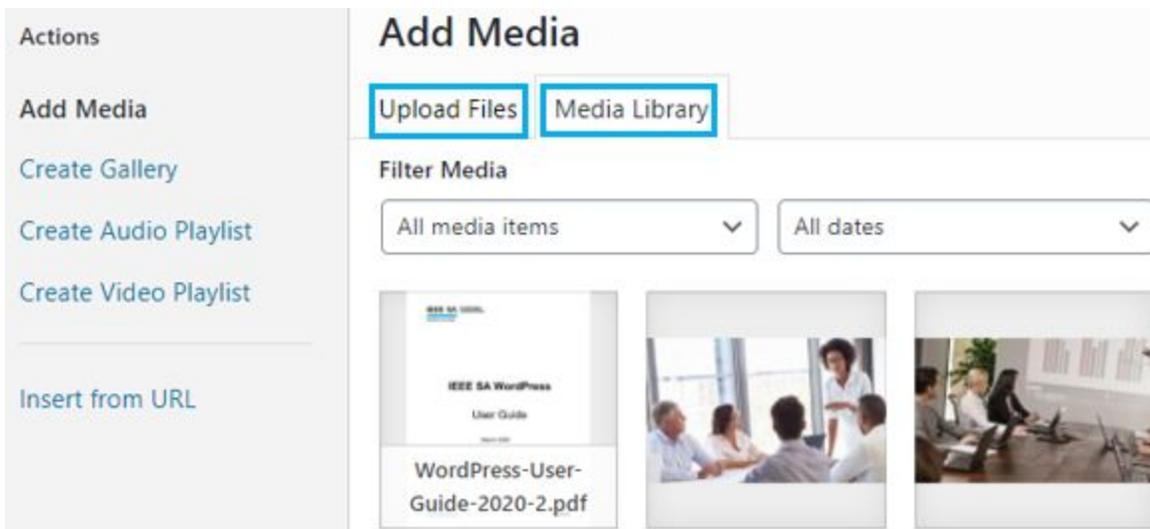


Note: Until approved, the minutes must be denoted as a draft.

3. Click Add Media or link icon to upload the meeting agenda and/or minutes to the textbox area.

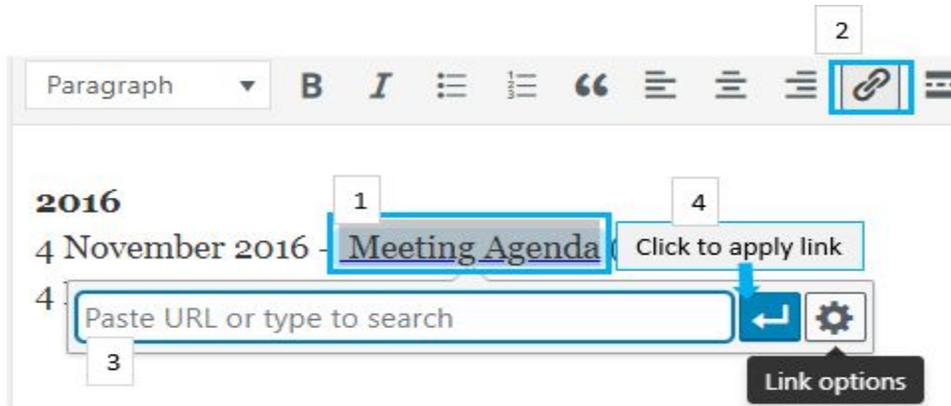


- To add a media / file, you can either select Upload Files or Media Library



Once you select and upload a file, click Insert into page on the bottom right.

- To insert link to file, {1} select a block of text you'd like to hyperlink



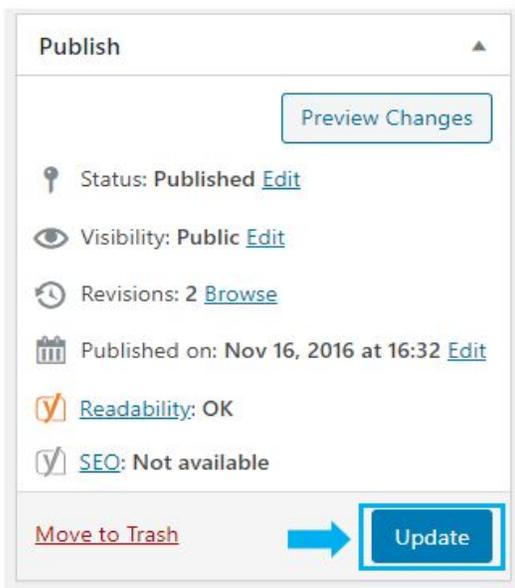
{2} click the **link icon** from the toolbar

{3} Paste the copied URL

{4} Click the **down-left arrow**

{5} You can also edit the link URL by selecting the **Link options** icon

3. Click **Update** on right when finished.



## 6. User Roles List

User roles determine the access level or permission of a person authorized (invited by an Administrator) to use a WordPress site.

### Administrator

An Administrator has full power over the site and can do everything related to site administration\*. Administrators can create more administrators, invite new users, remove users, and change user roles. They have complete control over posts, pages, uploaded files, comments, settings, themes, imports, and other users.

Nothing related to site-administration is off-limits for Administrators, including deleting the entire site.

\*Note: Administrators are not able to transfer site ownership if they do not own the site. Administrators are not able to revise or manage paid upgrades that are owned by a different user on the site.

### Author

Authors can create, edit, publish, and delete only their own posts, as well as upload files and images. Authors do not have access to create, modify, or delete pages, nor can they modify posts by other users. Authors can edit comments made on their posts.

### Editor

Users with an editor role have full control on the content sections of your website. They can add, edit, publish, and delete any posts on a WordPress site including the ones written by others. Editors can moderate, edit, and delete comments as well. Editors do not have access to change your site settings, install plugins and themes, or add new users.

## **Contributor**

Contributors can create and edit only their own posts, but cannot publish them. When one of their posts is ready to be published, or has been revised, the Administrator needs to be notified personally by the Contributor to review it. Furthermore, once a Contributor's post is approved and published by an Administrator, it can no longer be edited by the Contributor.

Contributors do not have the ability to upload files or images.

## **Subscriber**

Users with the subscriber user role can login to your WordPress site and update their user profiles. They can also update their passwords. This role cannot write posts, view comments, or do anything else inside your WordPress admin area.