

WordPress User Guide for General Content Editors

1. Logging on to the new site

Open your web browser and go to:

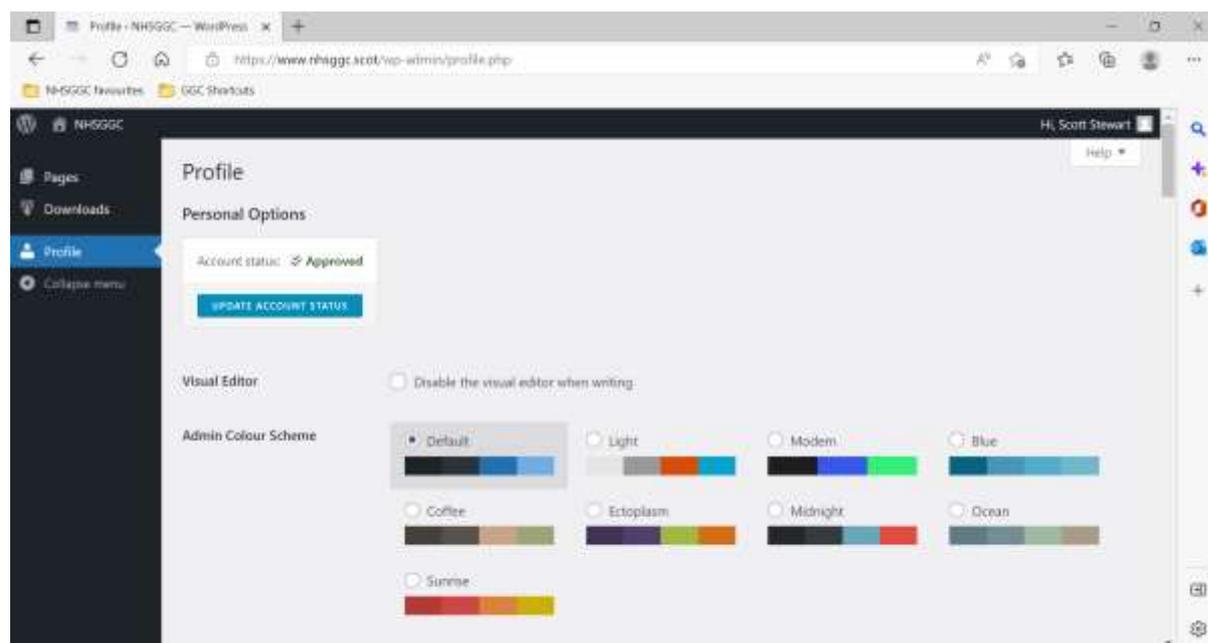
<https://www.nhsggc.scot/wp-admin>

Enter your provided username and password.

When you first logon, you be taken to your profile area.

eHealth advise that you change your password when you log in, this can be done in the profile tab. We advise a three word password with no spaces. You can find a 3 word password generator tool here - <https://www.nexcess.net/web-tools/secure-password-generator/>

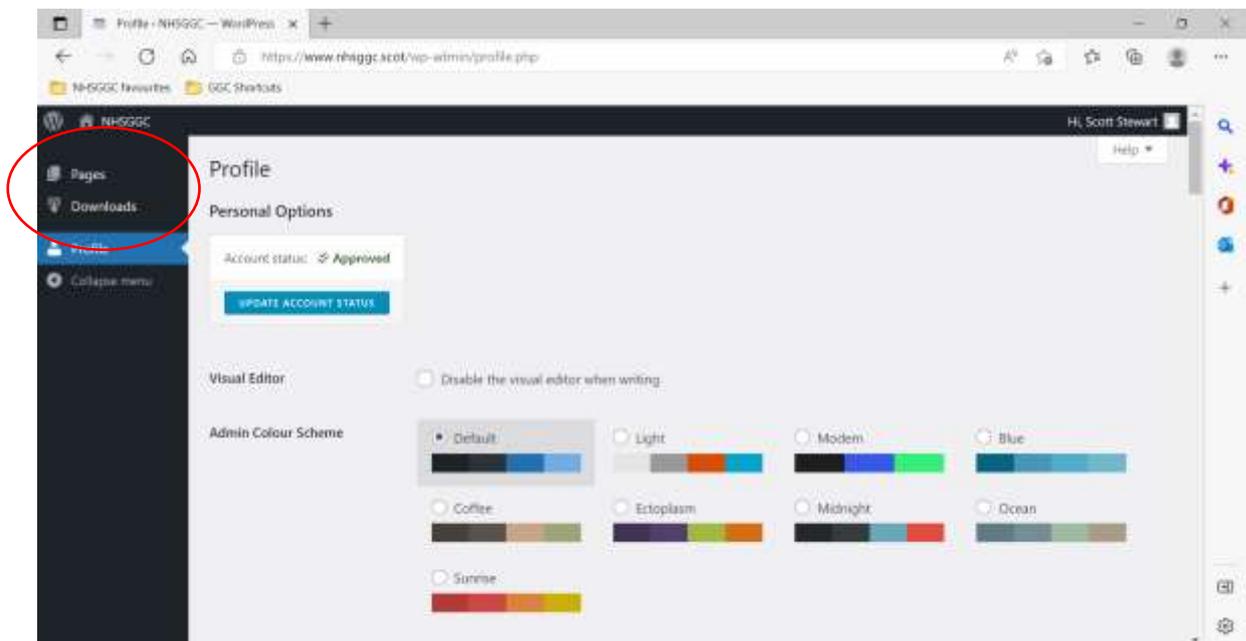
By having a strong password this ensures your account is secure and can help prevent someone accessing your account and causing damage to your content and pages on WordPress.



2. Pages, Media and Downloads

On WordPress you only have access to Pages and Downloads but as the site develops, we may alter or adjust your access to the appropriate level.

You will find these areas on the left hand menu navigation on WordPress.



Each of these areas are explained below:

- **Pages;** this area is where you will find your pages and content within the site. We will explain how to navigate to your pages using the folders section later on.
- **Downloads;** this area is used for hosting document collections, such as archival documents (Core Briefs, Board Papers, etc), and other core business and service documents (policies, reports, etc). If you currently have, or require a document library listing page on the new site, please contact the Webteam and we will set this up for you. You can [view an example document listing page here](#).
- **Media;** the media section is where the webteam will host any images you need added to the WordPress site. Images should be for functional purposes only and should add value to your pages within WP. For example, this could be a site map of a hospital or a diagram of some sort. Please send the web team your request for review along with the hi-resolution photo or image in JPEG or PNG format. You must submit your request to add an image by emailing the web team.

3. Media Folder & Uploads

The use of images should be avoided on the new website. With this in mind please DO NOT upload images to your webpages or the WordPress system.

Any images which are approved by the design/web team must:

- Be for functional purposes only (not decoration) and should add value to the user experience. This could be a site map of a hospital or a diagram of some sort. However, in most cases this diagram/site map will be accessed via a link to a PDF document
- Be high resolution and an appropriate size
- Comply with NHSGGC brand guidelines
- Must have a suitable alt tag and comply with accessibility requirements
- Be uploaded to the correct folder - the unassigned files folder will be emptied on a monthly basis.

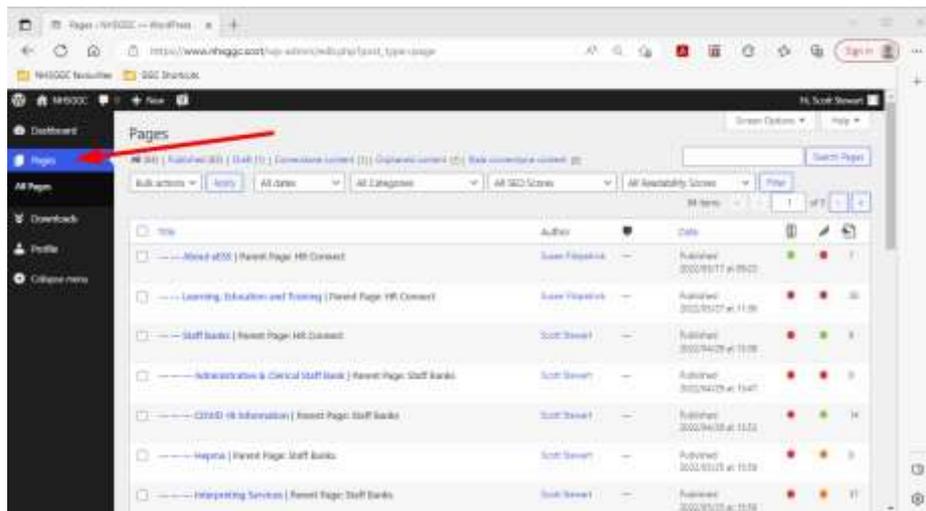
If you do have functional images to be added to your pages please send this request to the web team, as they will need to upload these to your media folder and pages to format these correctly.

4. Your Webpages

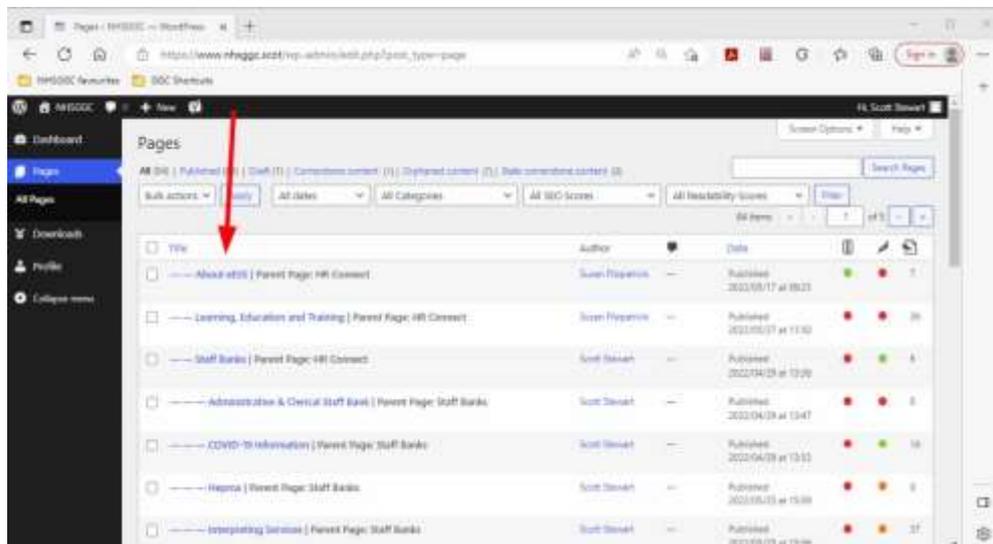
Navigating to Your Webpages Folder

When you are looking to manage your web pages you will need to navigate to the Pages area on the left menu navigation as shown below or in the following video -

<https://www.youtube.com/watch?v=U1HkcqLw7Pg>

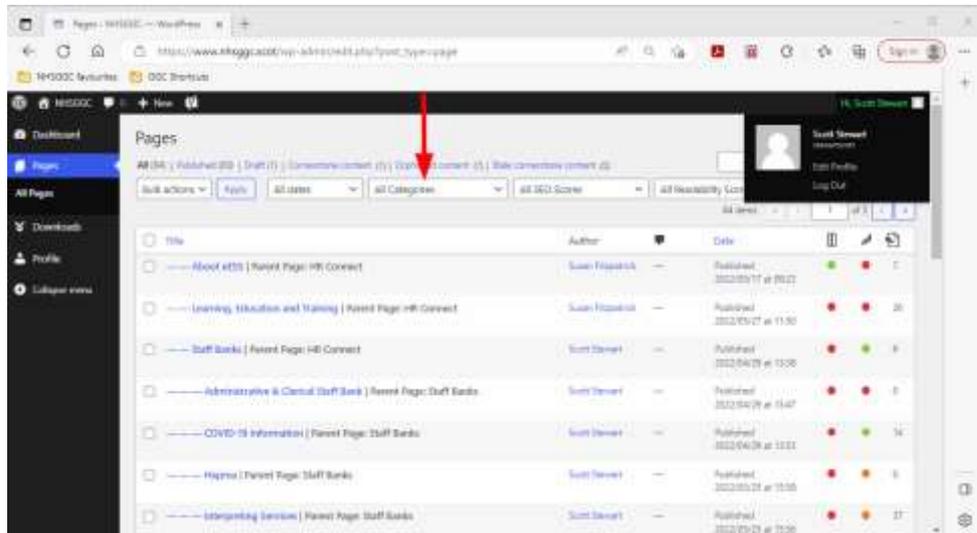


You will see your pages listed on the main central area on WordPress.



If you have access to multiple areas on WordPress you can filter the pages shown by page category. This will help you to just see the pages under a specific section you have access right to.

You can see this below or by watching this in practice on the following video - <https://www.youtube.com/watch?v=KW-MhwwYvV0>

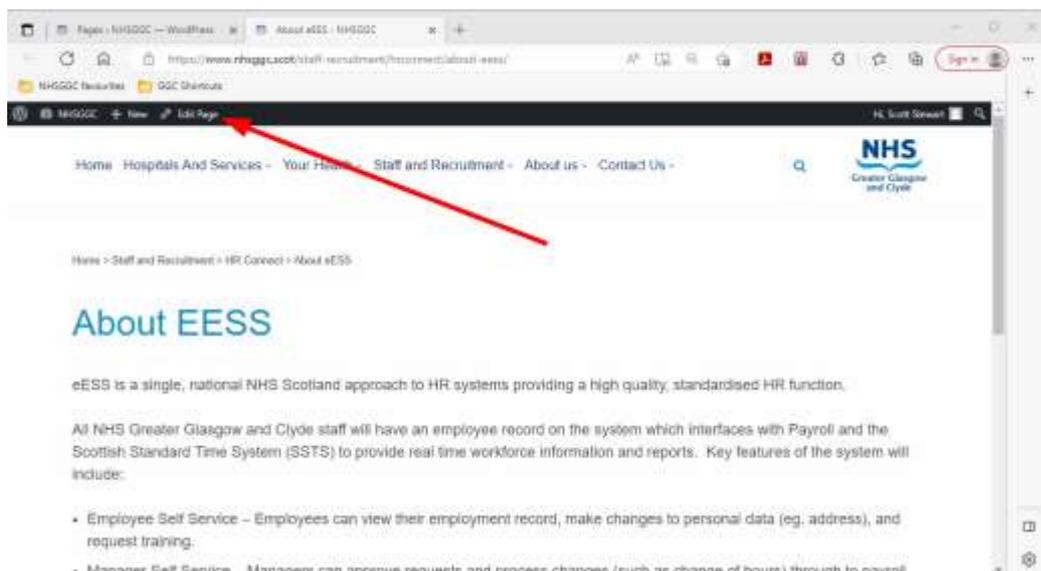


Quick editing a webpage

If you are logged in to WordPress, you can quickly edit a page by viewing the front end page on the live site. You should have the option to 'Edit Page' on the tool bar across the top as shown below and In this video -

<https://www.youtube.com/watch?v=RVJn4eHHhek>

Note: Remember for this to work you must be logged in to WordPress.

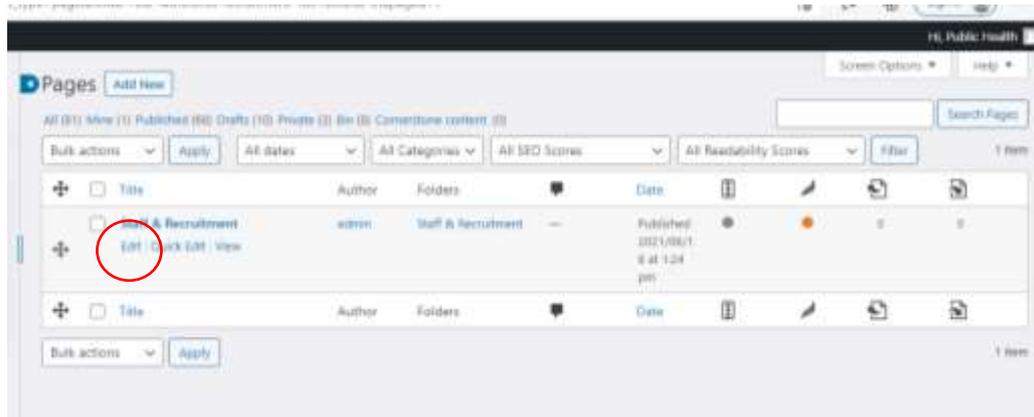


Editing a Page

When you are looking to set up your pages on the new site we will set up the basic pages going by the structure your team provided us with.

This means all you need to do is then populate those pages with the content from your pages on the current/old NHSGGC site.

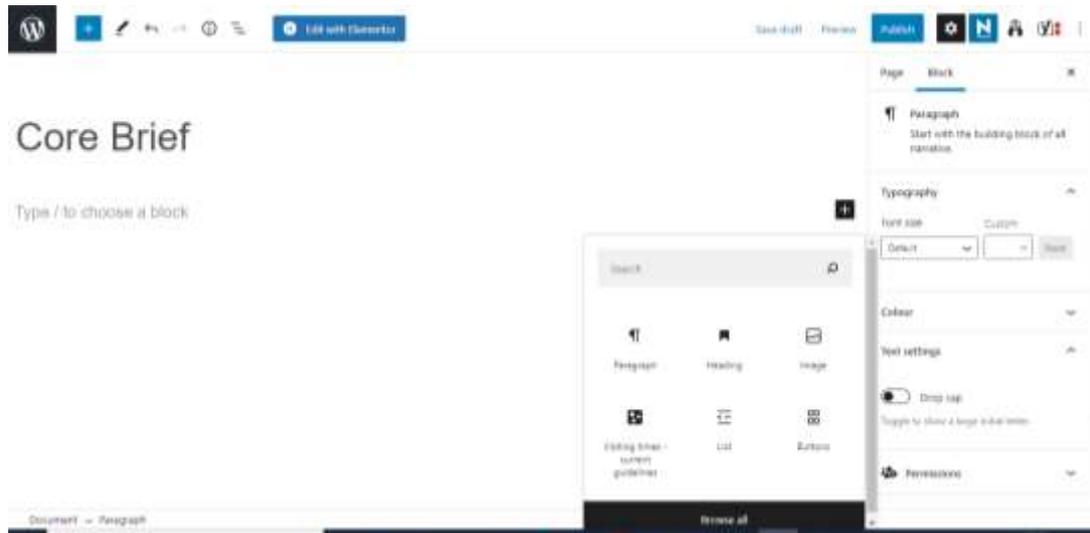
To start editing the basic pages we have set up for you please hover over the page and click 'Edit'



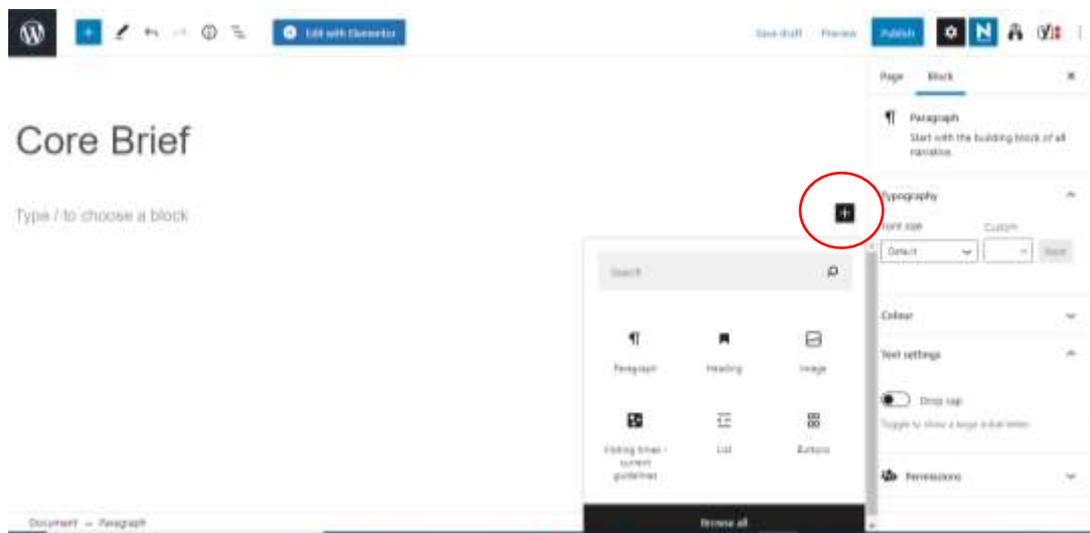
When you first open the page you will see we have added the title to get you started.



If you click on the title and then press 'Enter' on your keyboard this will add a paragraph block. A paragraph block is what is used to add text to your webpages.



You can also add other blocks by clicking on the small box as shown below.

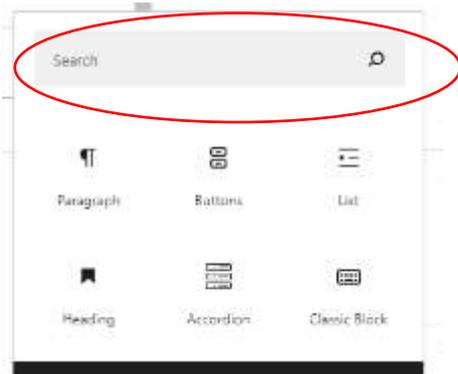


Blocks for adding content to Webpages

Below are the ONLY blocks you will need to add content to your pages. Use of any other blocks not shown below are not permitted.

Please note these must be used appropriately.

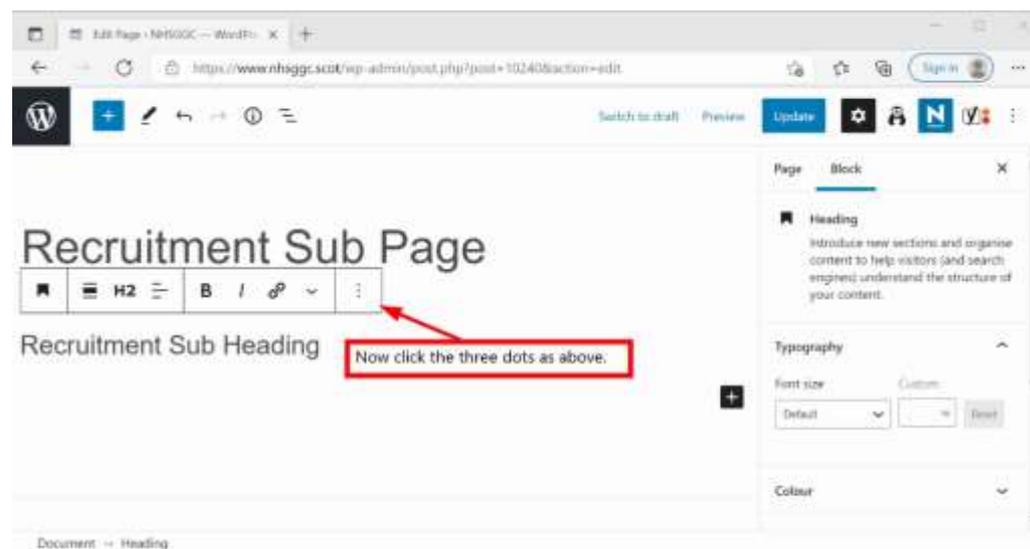
If you can't find a block you can use the search tab to find the block you are looking for.



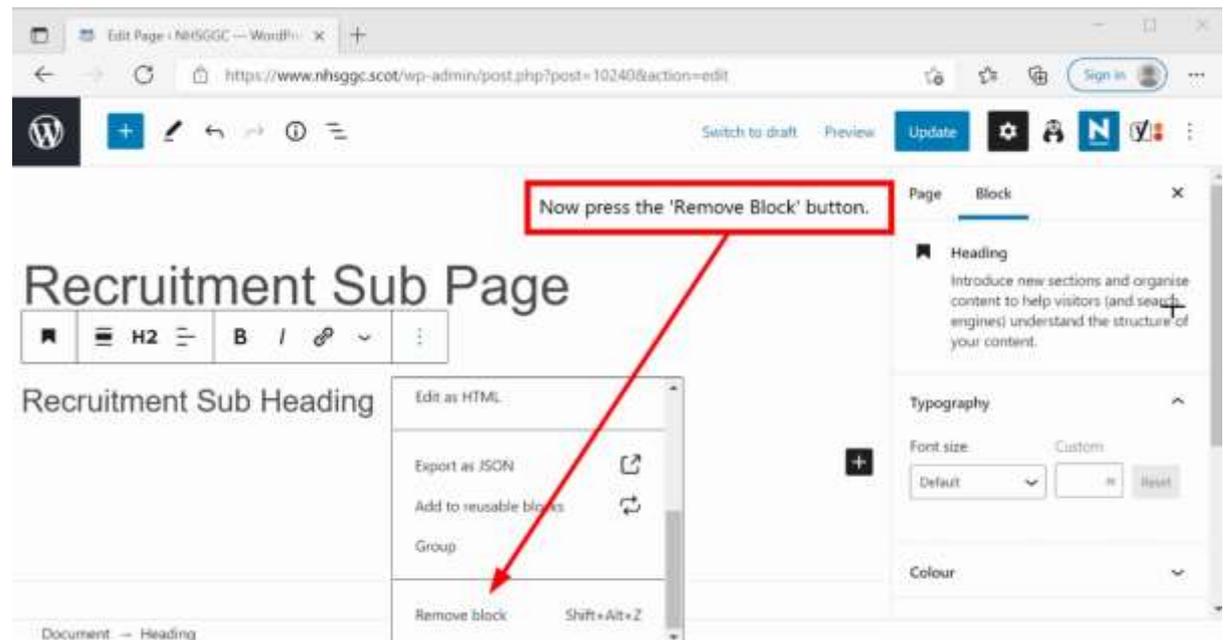
Deleting a Block

Sometimes you may need to remove or delete a block from your page.

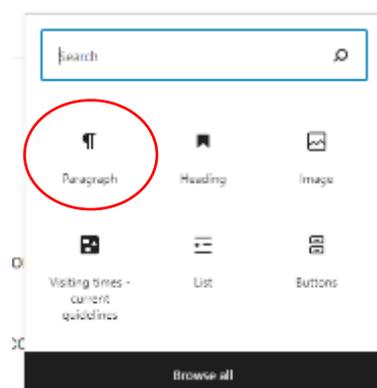
To do this please start by clicking on that block and select the three dots button.



Now select the 'Remove Block' button to remove that block.



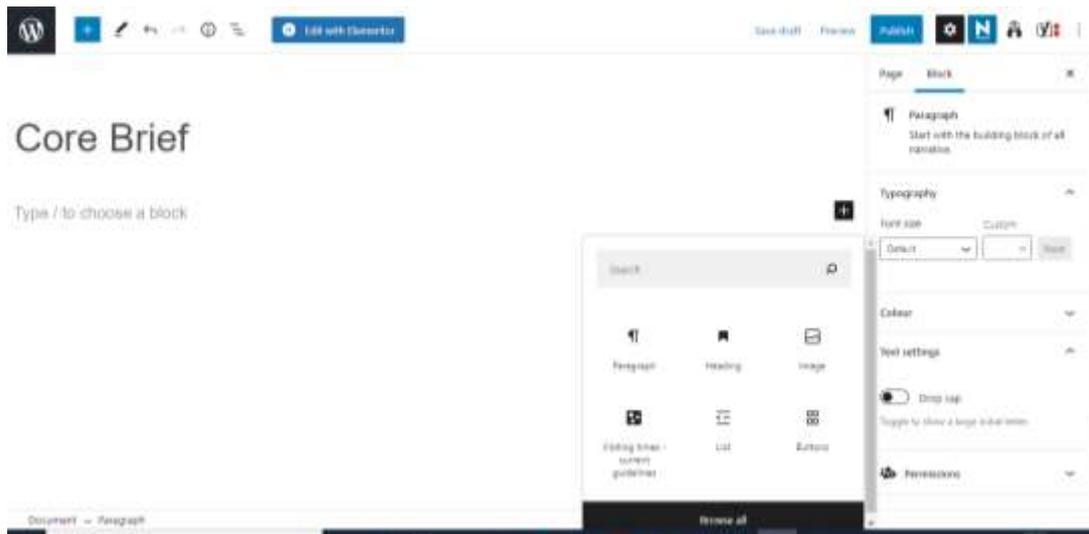
Paragraph Block



You will use the Paragraph block to add basic text to the page.

Below is how a paragraph block should look when you add it to the page.

If you click on the 'Type/to choose a block' this will allow you to start typing or copy your text in.

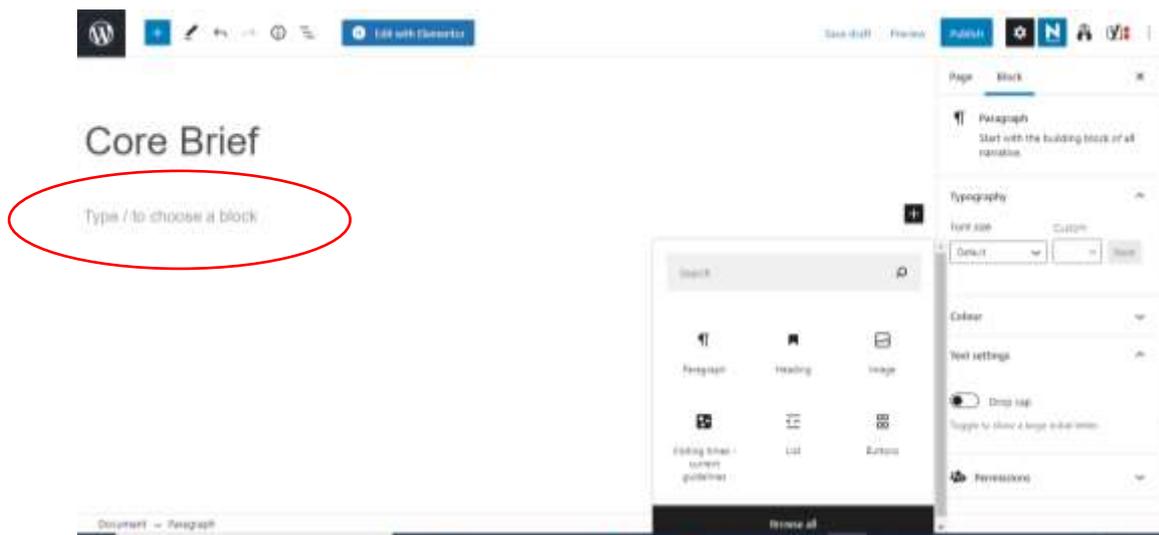


If you are copying text from a Word Document, we advise that you copy this into **'Microsoft Notepad'** first. This helps strip out any formatting issues with the text when copying this on to the new website.

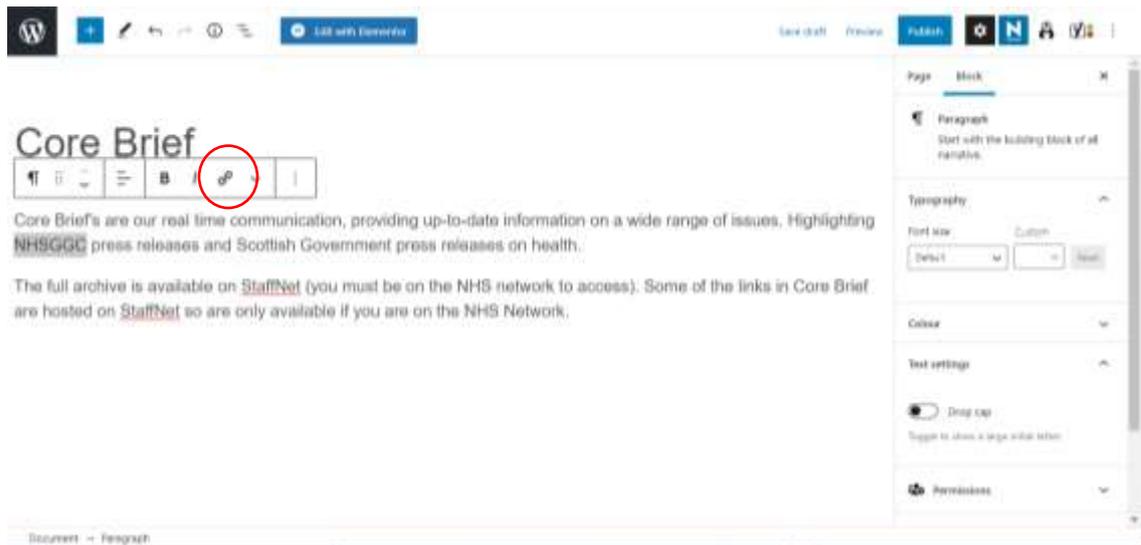
If you are copying text from the old NHSGGC website you can copy and paste this text directly on to WordPress with no issues. Links within the text should also stay intact.

Please refer to our [style guide](#) and [writing guide](#) on how to write your content specifically for the website as well as how to format text when updating your webpages.

Adding Links In Your Pages



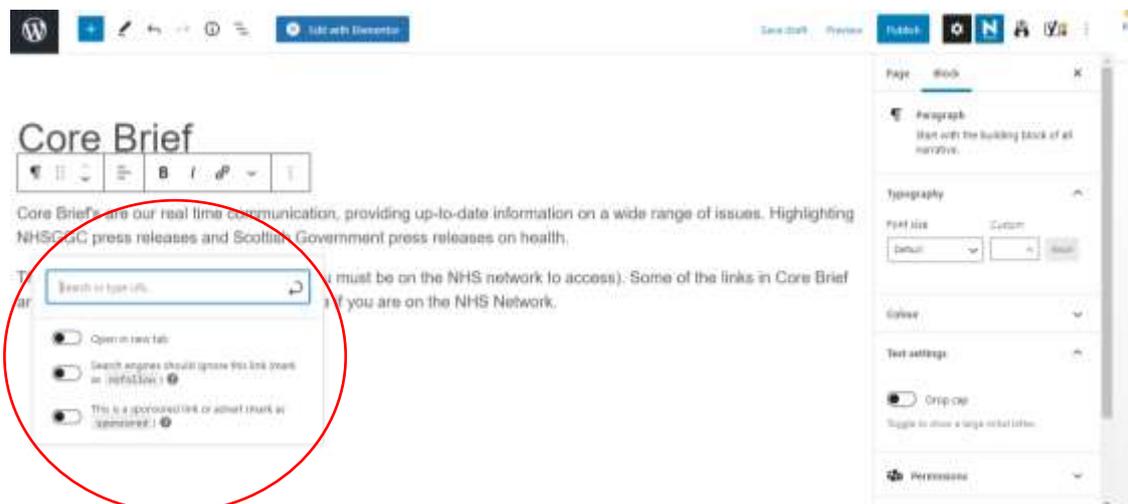
To add a web or hyperlink to your text, highlight the text that you want to link to, then click on the **Link** button as shown below.



This will allow you to search for a page on the NHSGGC website, or add the URL of an external website or page.

You can link to another page on the NHSGGC site by searching for it. Start typing the name of the page and it will show matching pages. Select the one you require by clicking on it. If you're unsure, you can always view the page on the live site to see what the name of the page is.

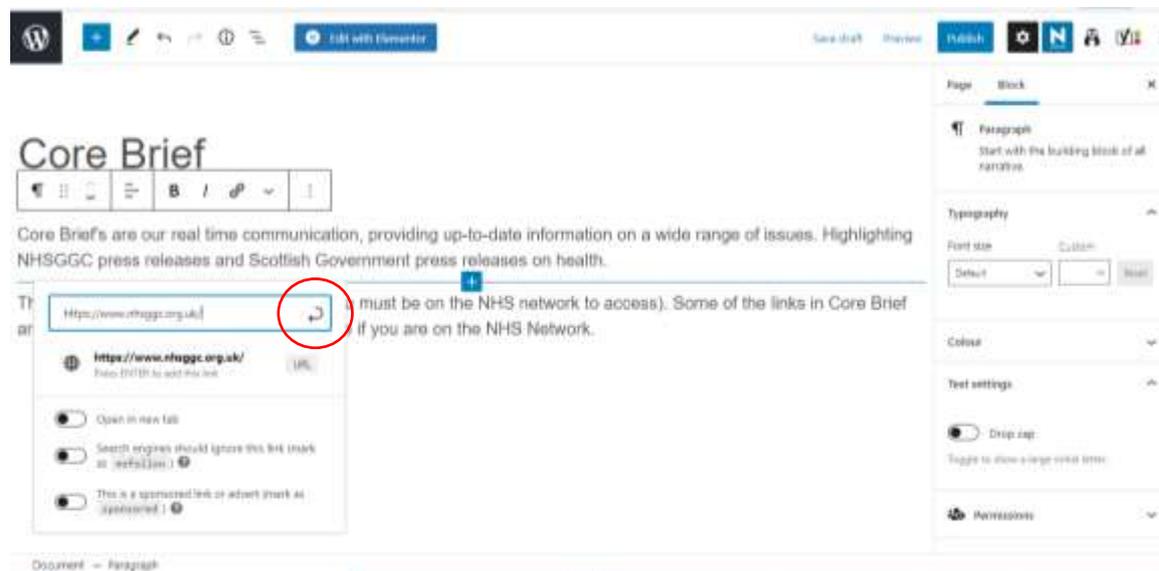
Ensure you **DO NOT** click on the “open in new tab” option.



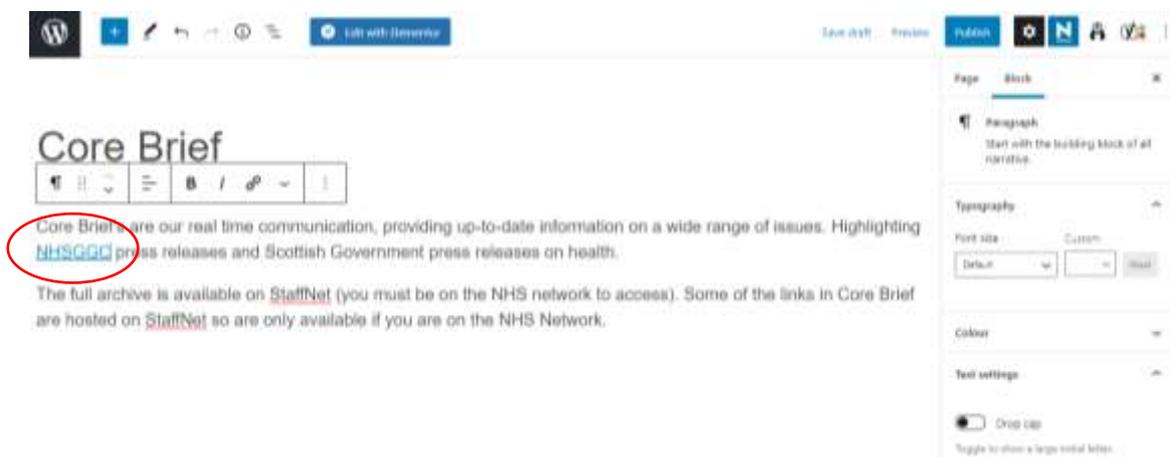
When linking to a page on an external website, simply paste the full URL required, then click the ‘Open in a new Tab’ button.

If you are linking to a page or link within the NHSGGC website there is no need to click this option.

Once your link is copied into the field you then need to click the arrow button to embed the link within the text.



Now your text will be linked to the URL or web link.



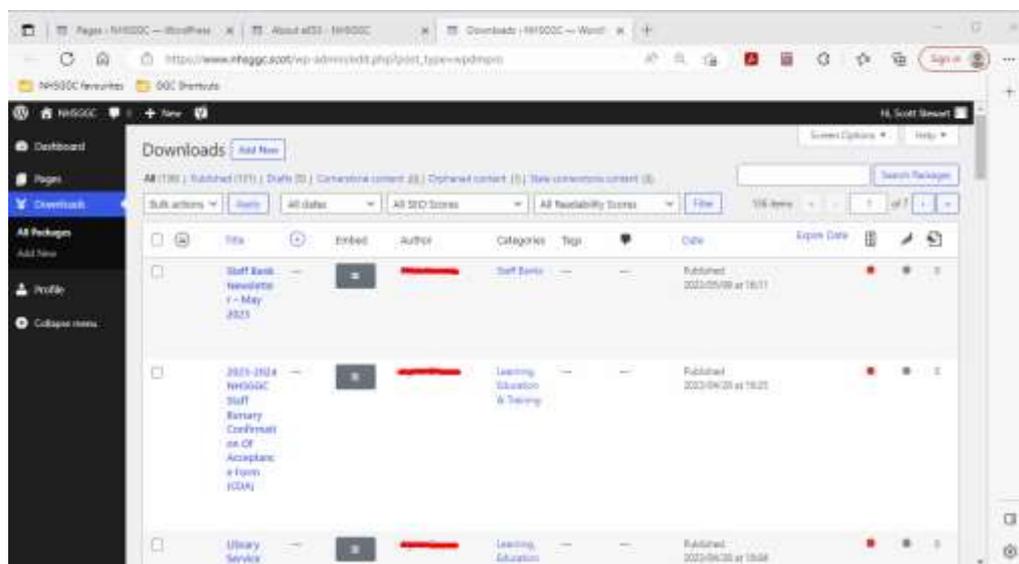
Linking to a Word Document or PDF on Web Pages

To link to an individual file within the WordPress editor you need to upload that file to your assigned downloads folder.

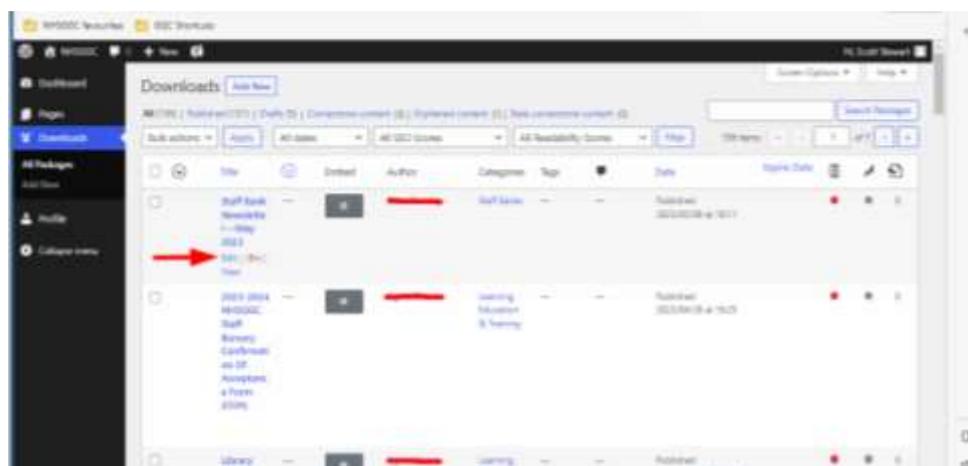
Please refer to our later section which advises you on how to upload to your assigned downloads folder.

To get started navigate to the downloads section and your folder we have assigned to you.

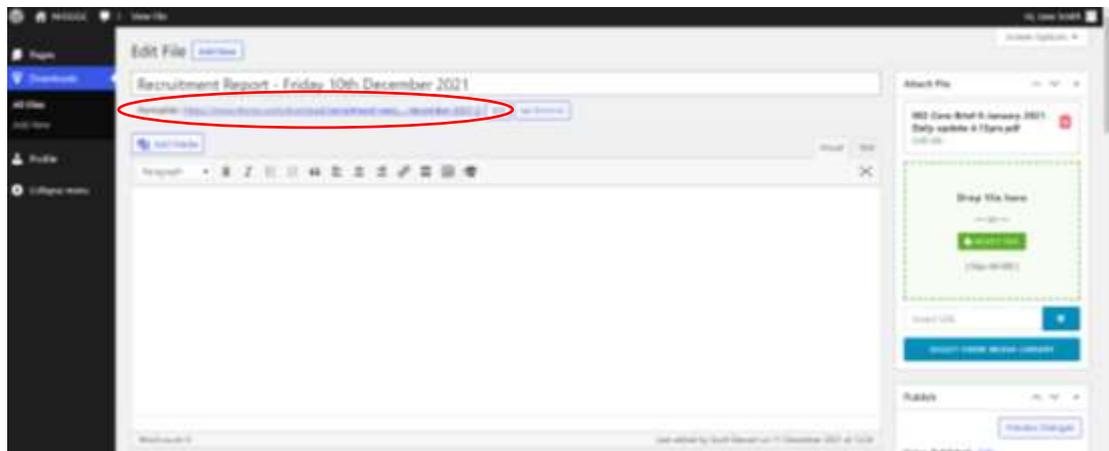
If you need more information on uploading your documents please refer to our later section on how to do this.



Now select 'Edit' on the file you need to link to on your webpage.

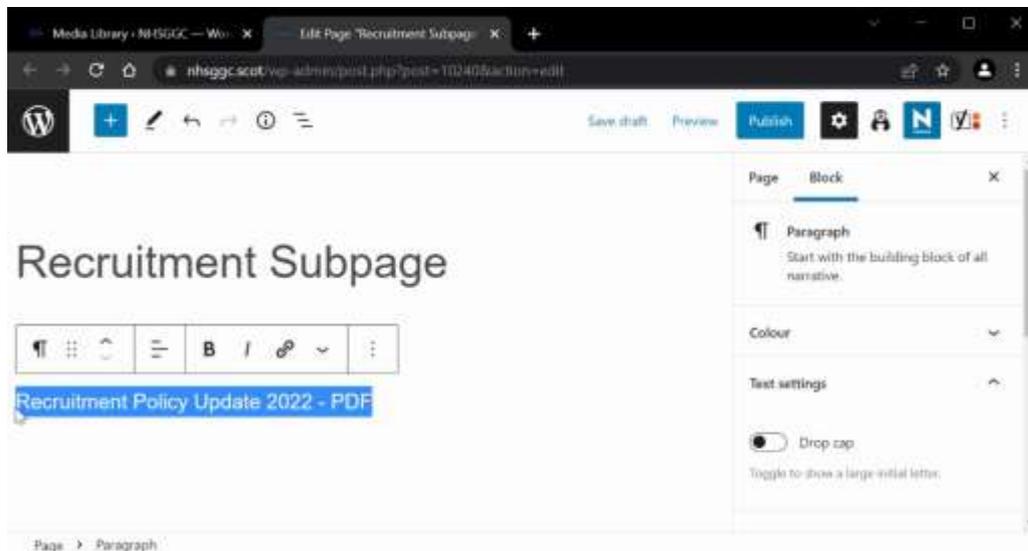


Now copy the file Permalink, this will copy the file URL which you can then embed in your text within the WordPress editor.



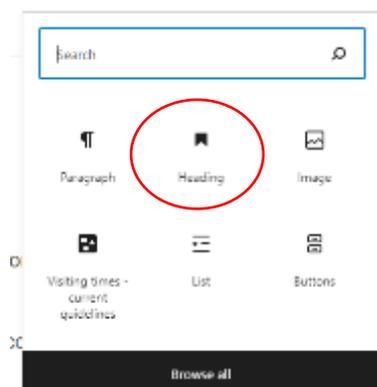
Now navigate back to your page and follow the same process to hyperlink text, this time you will insert the file URL you copied from earlier.

Remember when linking to any file that you turn on the **'Open in a new tab'** option on the hyperlink editor.



Once you have embedded the link, please publish your page and ensure the link works on the live version of that webpage.

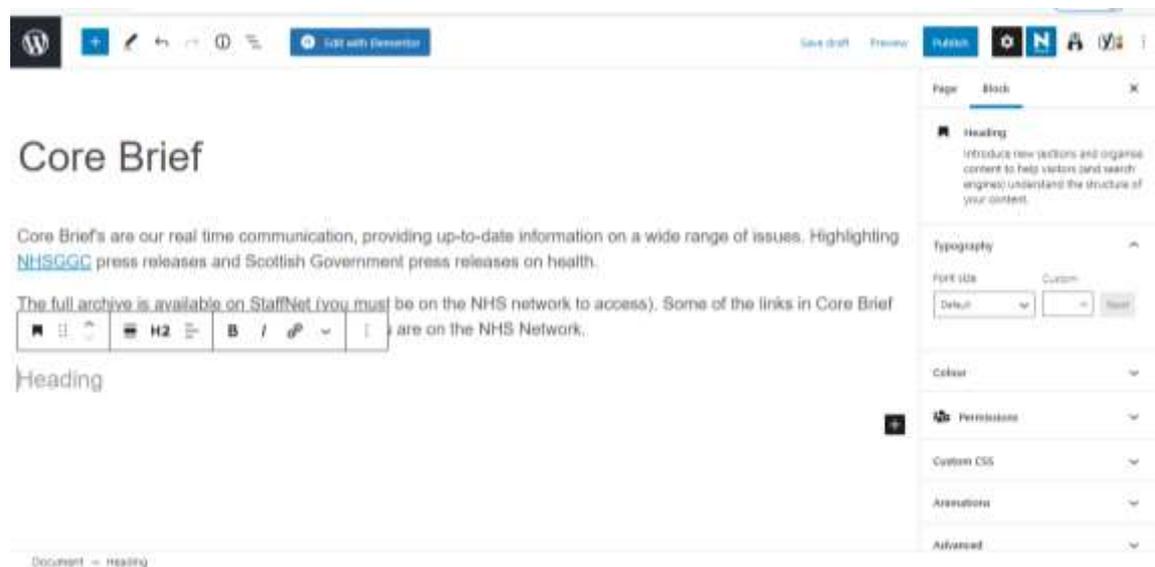
Heading Block



These are used when you are looking to add sub headings which separate your content.

It is important to section your content and use headings appropriately, this this will ensure the page is accessible and easy to read.

This will also improve your readability score which must be green. (Please refer to our later section on Page settings which will cover improving readability scores on the website.

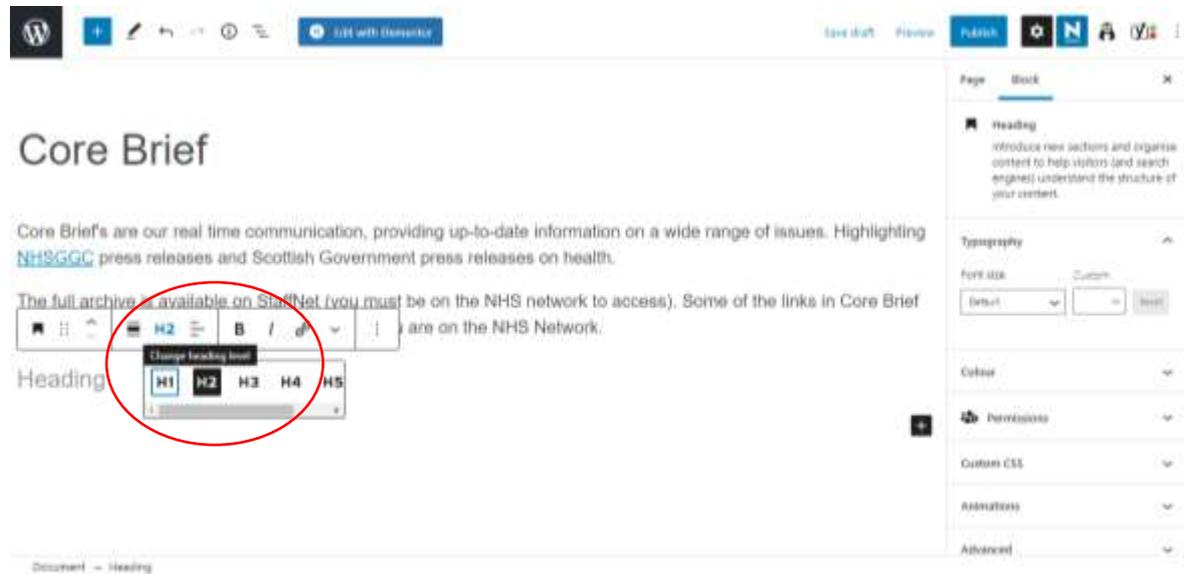


H1 headings are identified as the main headings of the page. When you type in the title of the page this is automatically a H1 heading.

H2 & H3 headings are used for any sub headings featured within your content.

With this in mind if you need to add a sub heading please make sure to select a **H2** or **H3** heading.

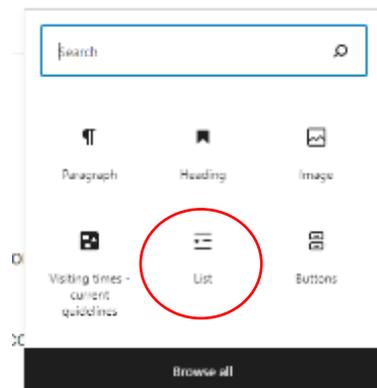
To change a **H2** heading to a **H3** heading click on the button below.



If adding a sub heading to an accordion you should start this off as a H3 heading and then down to a H4 heading if it is a sub heading within your H3 sub heading. Use of H2 headings within accordions is not permitted.

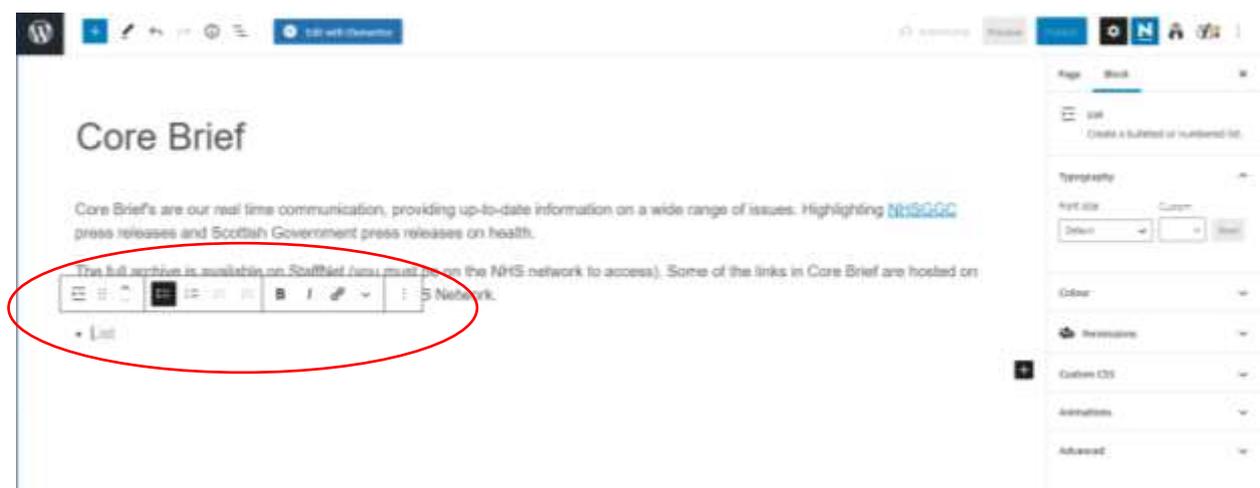
Watch our [video on how sub heading hierarchy works within the WordPress editor](#).

List Block



The list blocks are used for when you are looking to add bullet points to a page.

You can switch between a normal bullet list or to a numbered version as shown below.



Adding Buttons

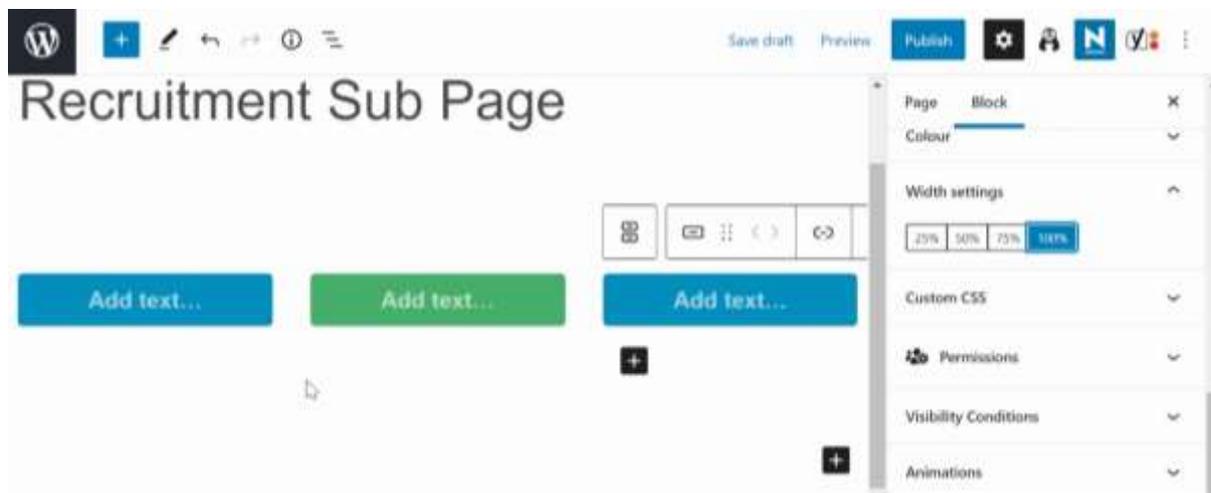
Once your pages are set up and have been checked, the Webteam will work with you in adding navigation buttons (links) on your home page. Since there is no side bar navigation menu on the new website, these are essential to provide users access to all your content.

Sub-pages can have their own navigation buttons to allow access to lower level content.

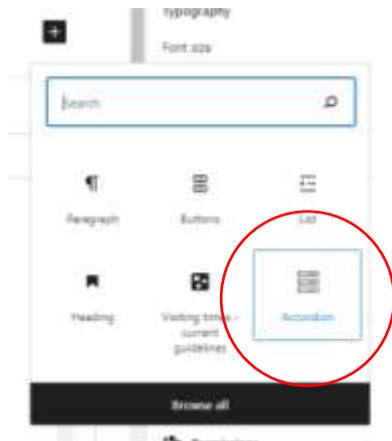
These work in the same way as the panels / tiles on the current website.

If you need to add buttons to link to documents or webpages you can also do this but only if used appropriately.

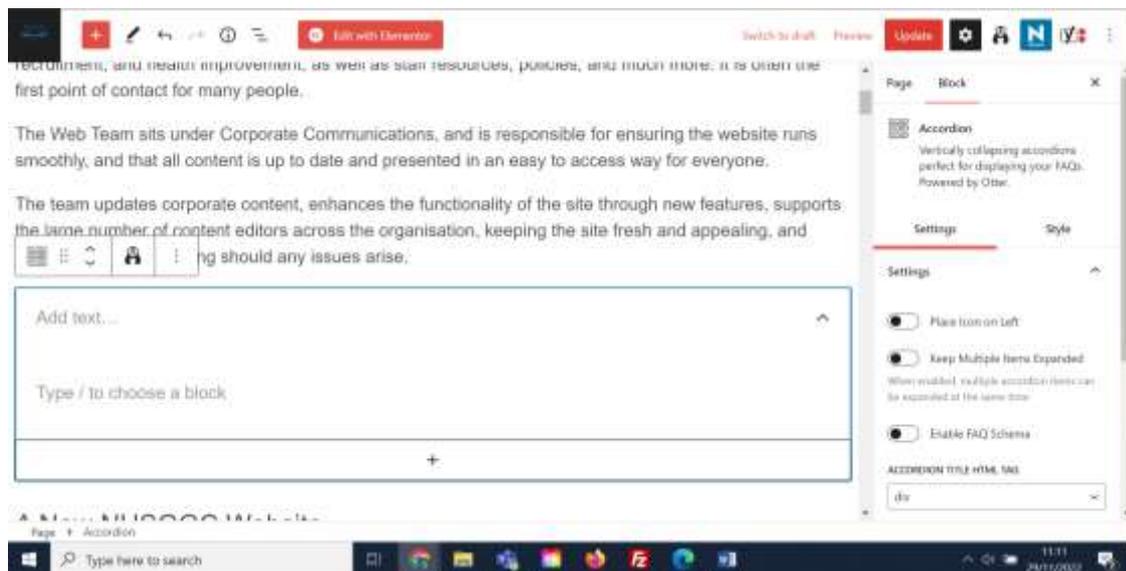
Please [watch our video on how to style your buttons and set them up properly](#).



Accordion Block (Used for Drop Down/FAQ type lists)

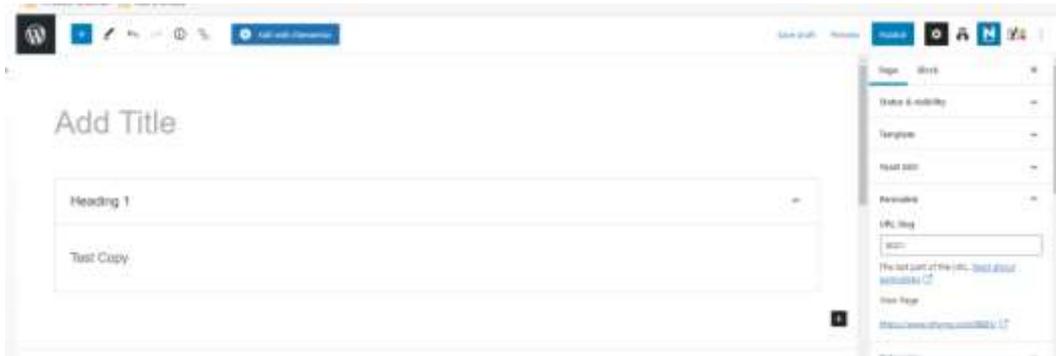


When you add the Accordion block you will be shown the below. These should be used to add content which is relevant to the page and can be added under a drop down. If you have multiple pages covering once section you could add this information under drop downs like this.



Here you can start adding in your heading and text for the drop down.

Within the text section it will automatically add a Paragraph block. You can also add other blocks to here such as Button blocks, bullet point lists and more, as long as these have a relevant use.



Once you have added your content you can now select the button below once you have clicked on the drop down.



This will then let you add another drop down by clicking the button below your first.



This will then add on your next drop down which will sit under the first.

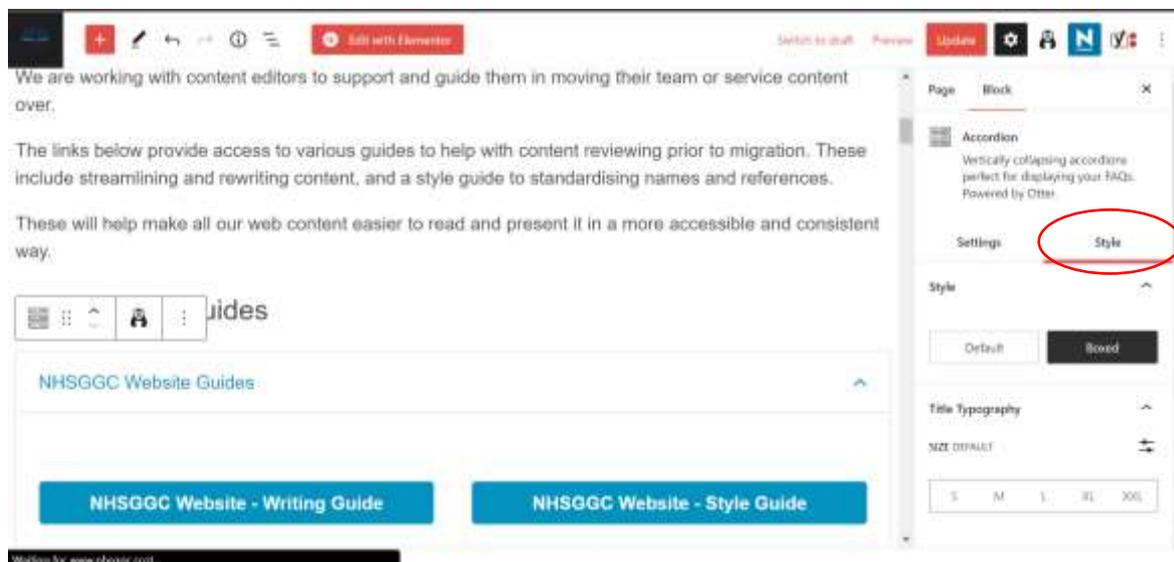


Styling your Accordion drop downs

If you click around the block again and select the accordion button as below you can now set the settings and style of the drop down.



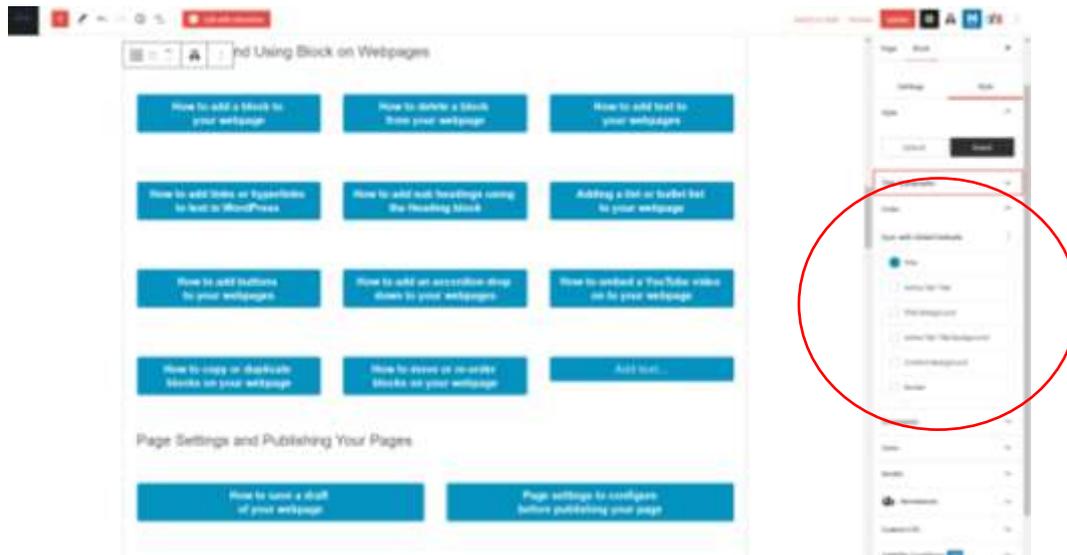
This will then open the block settings on the left hand side menu. Then select the Boxed style for your accordion.



Now go to the 'Dimensions' tab and set the gap between panels to '5'



Now go to the 'Colour' tab and set the title to the light blue colour as shown.

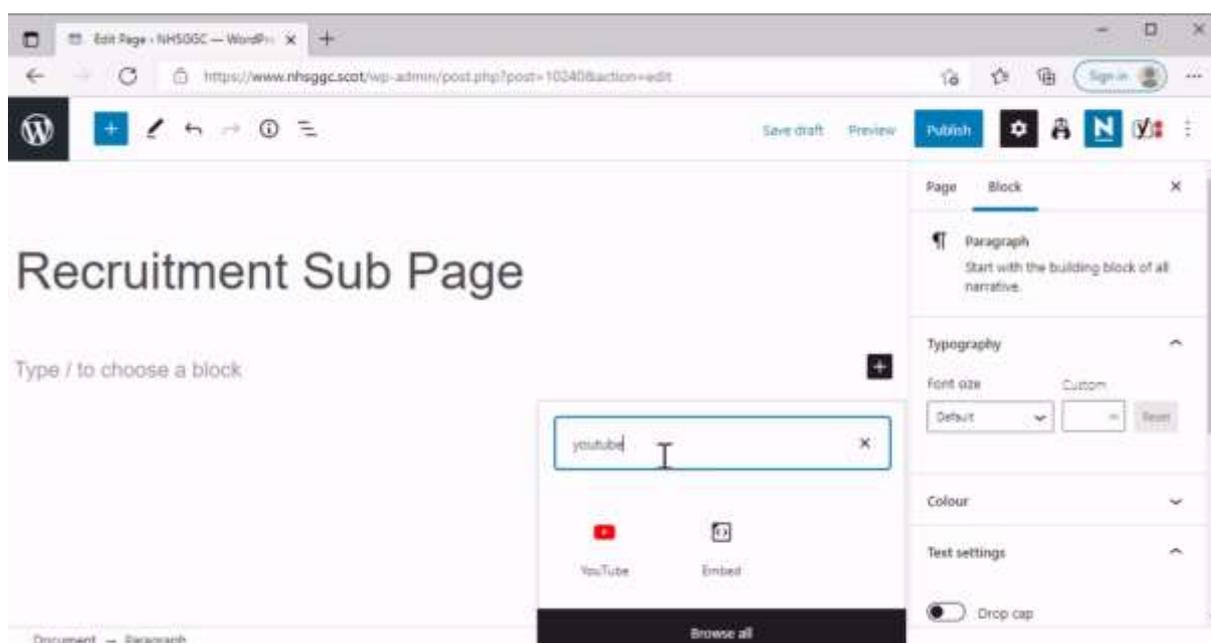


You can [watch our video on how to add and style your accordions for more information.](#)

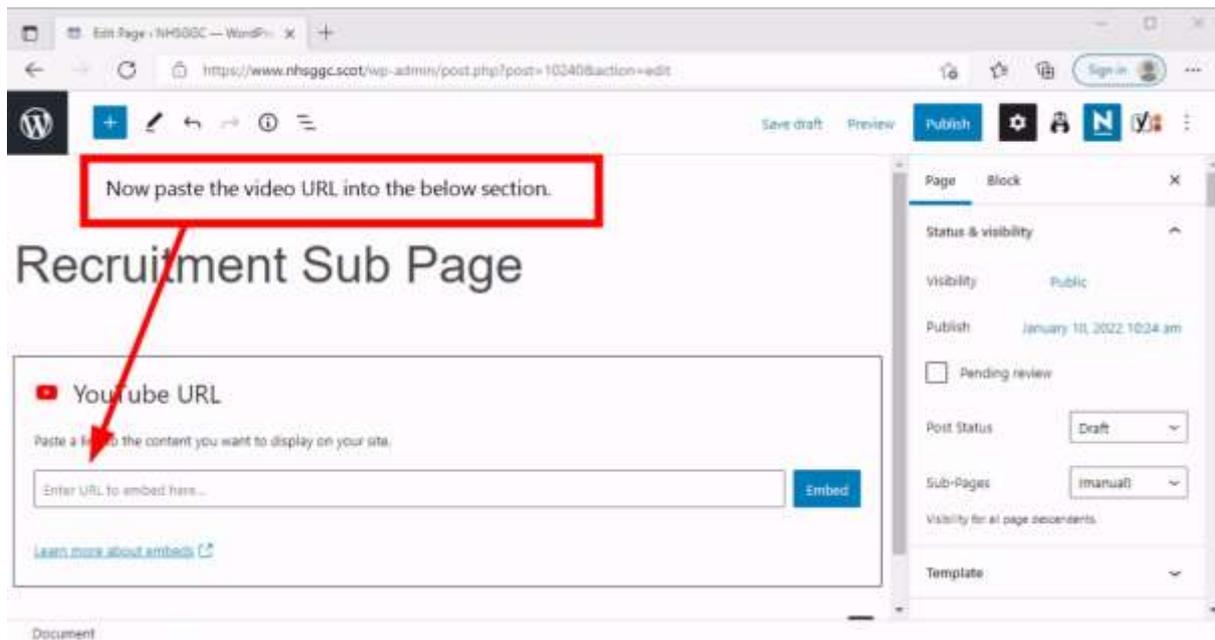
Embedding a YouTube Video to your page

If you are migrating YouTube videos that are live on your old pages, you can embed these easily by using the YouTube block.

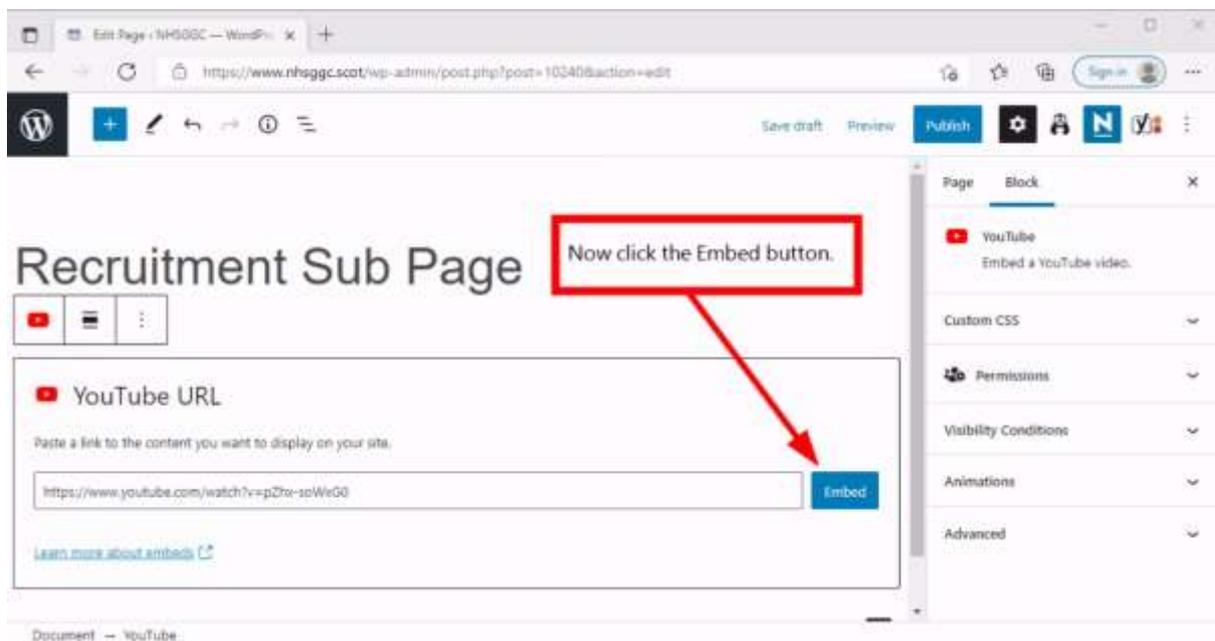
First add the YouTube embed block to the page.



Now add your YouTube link to the shown section.



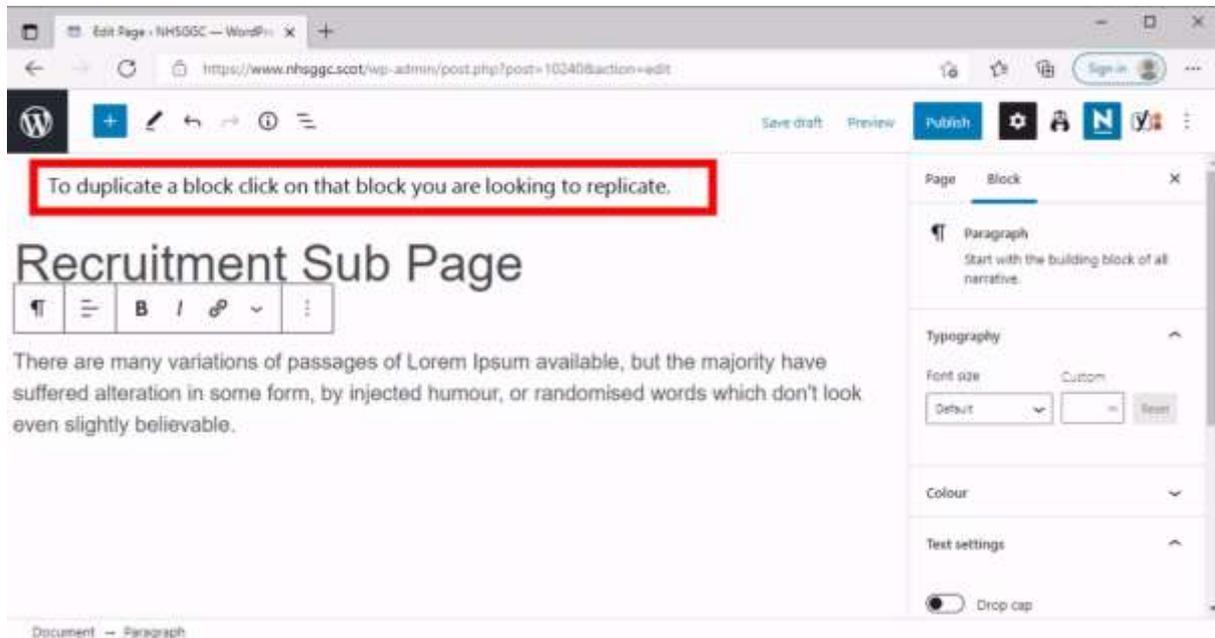
Once your link has been added then press the 'Embed' button.



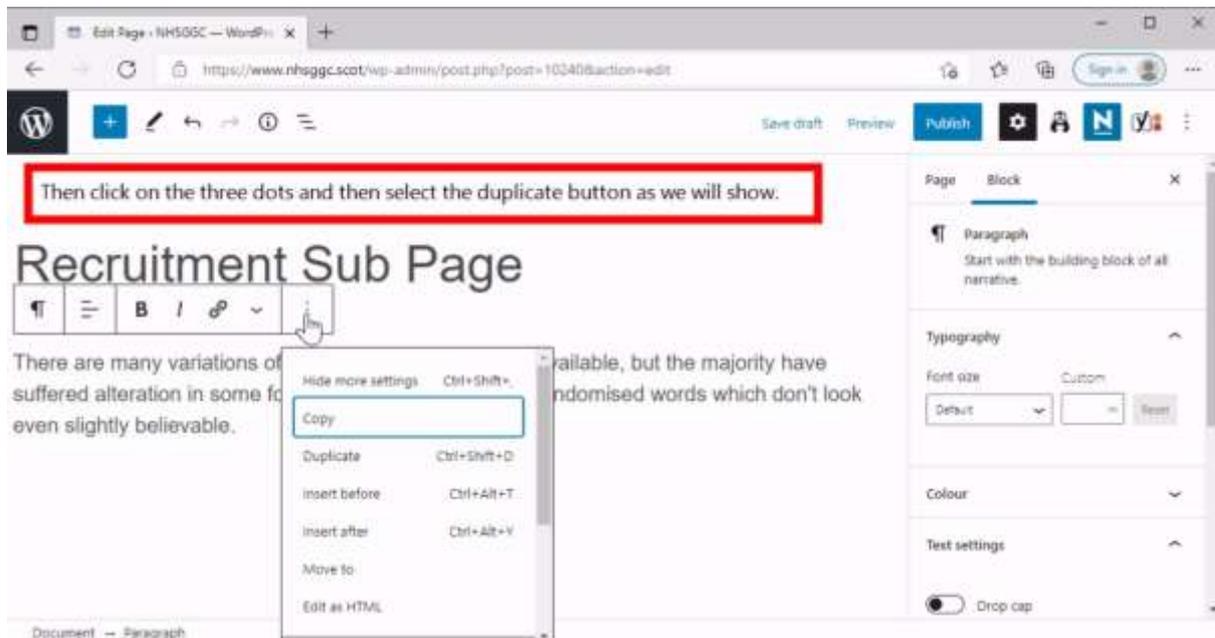
Duplicating Blocks

In some cases you might need to duplicate blocks.

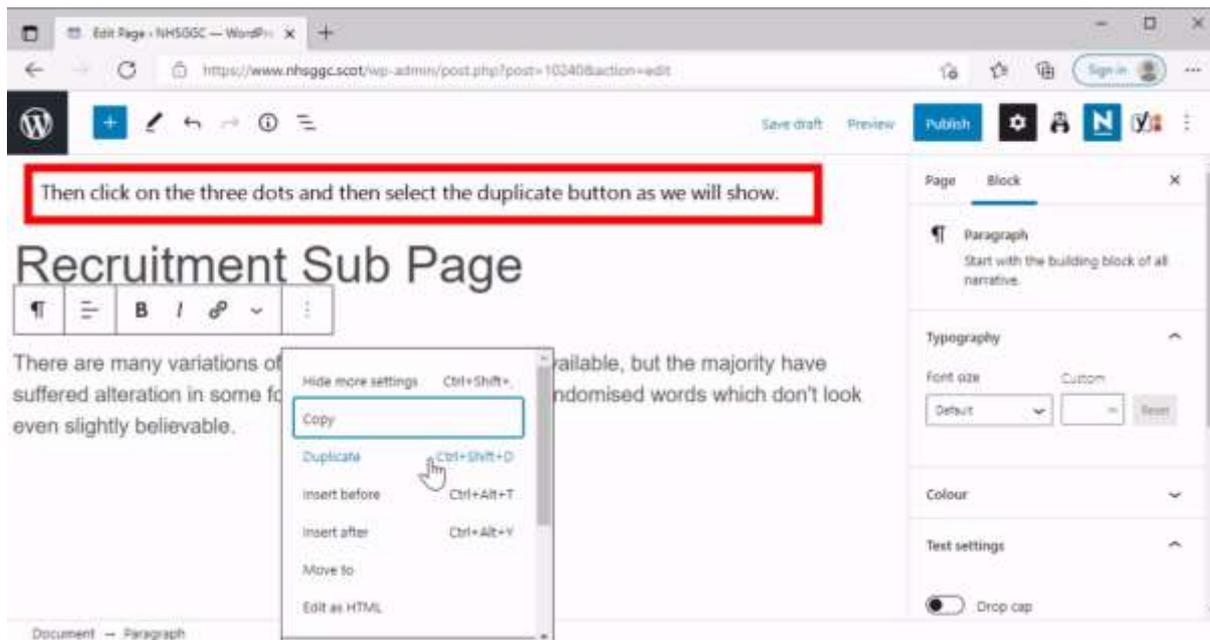
To do this select the block you want to duplicate.



Now proceed to click the three dots.



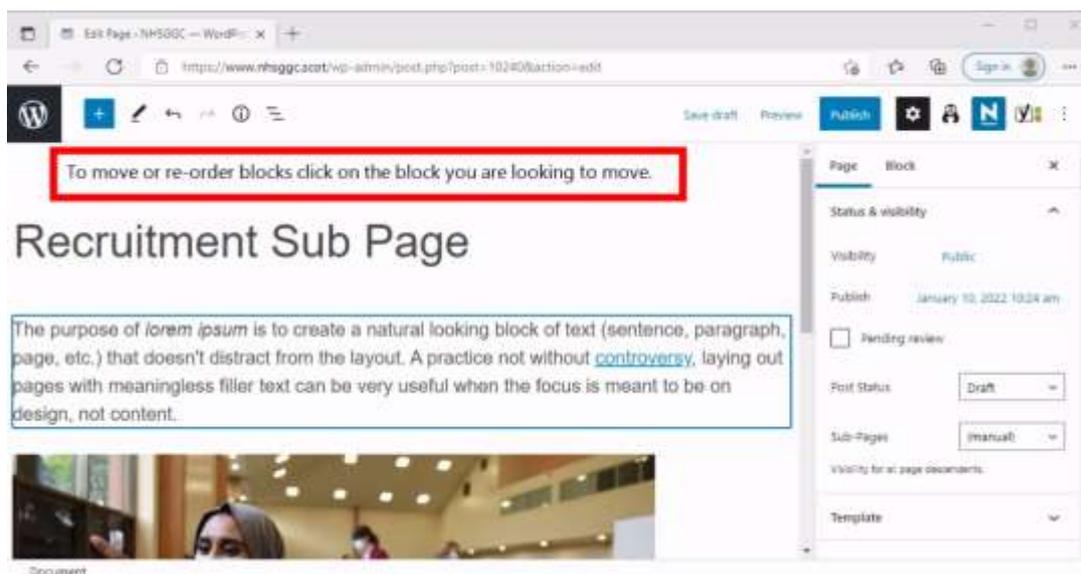
To duplicate the block select the **'Duplicate'** option shown.



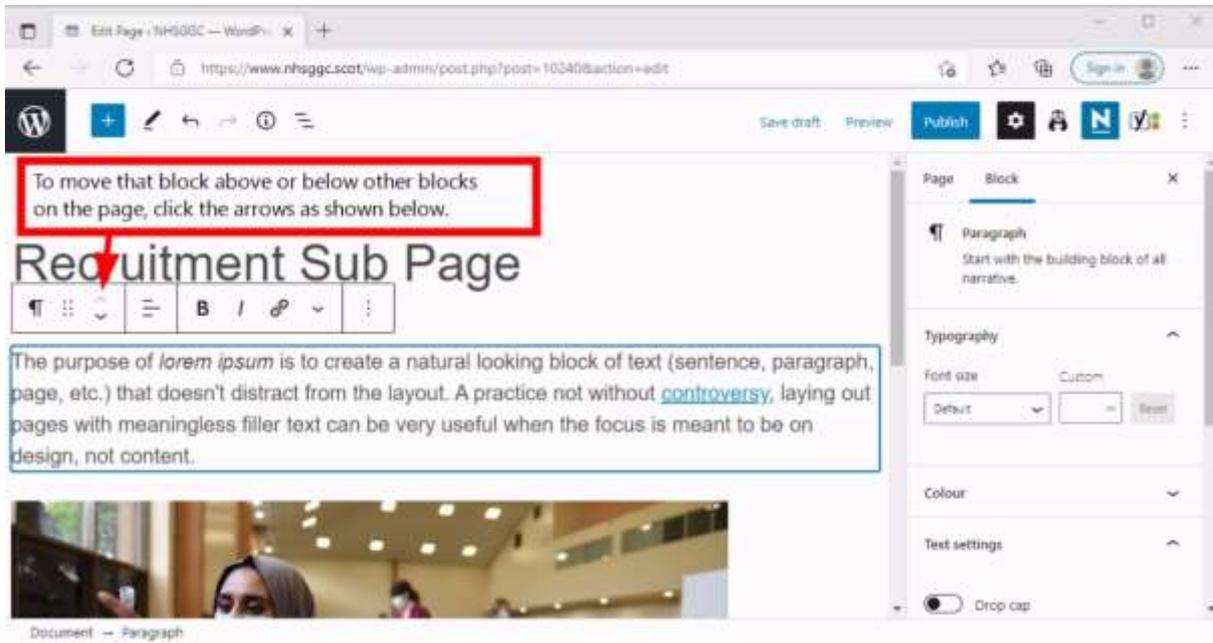
Moving or Re-ordering Blocks

In some cases you might also need to move or re-order the blocks on your page.

To do this select on the block you want to move.



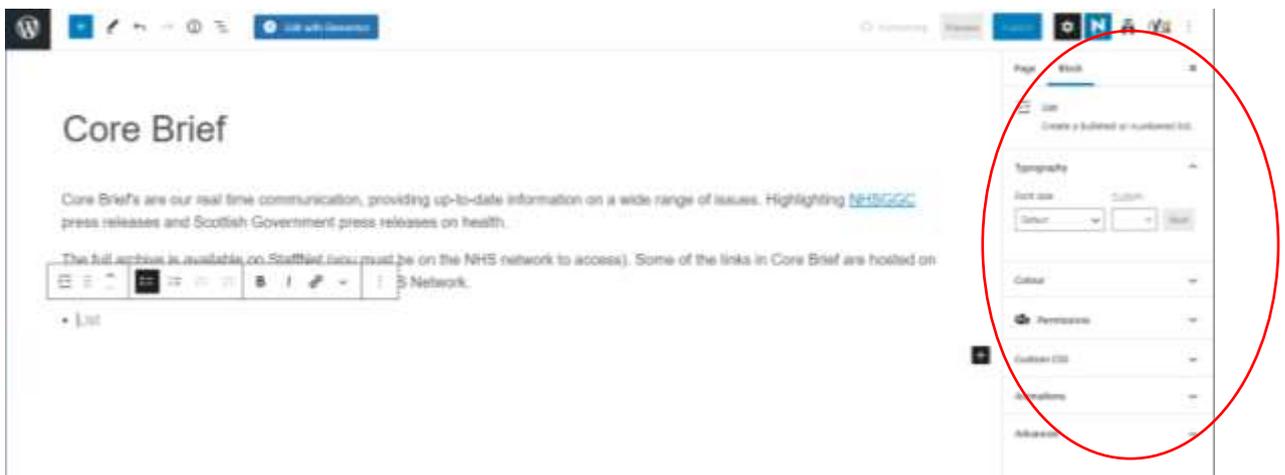
To move a block up or down the page press the arrow button show once you select that block.



Block Settings

When you click on a block you will also see the 'Block' settings on the right hand menu bar.

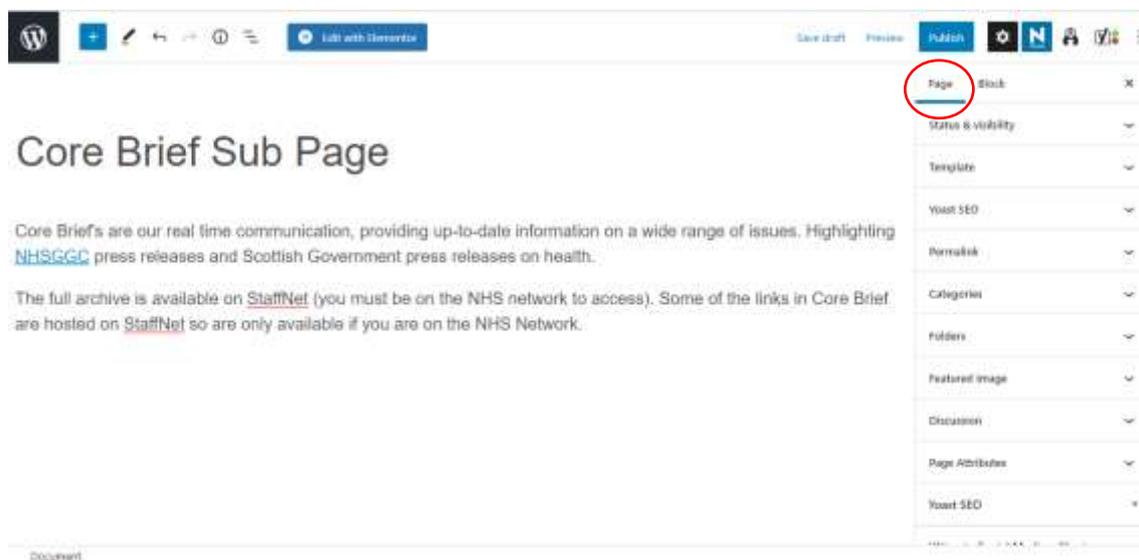
Here you can



Page Settings & Publishing Your Page

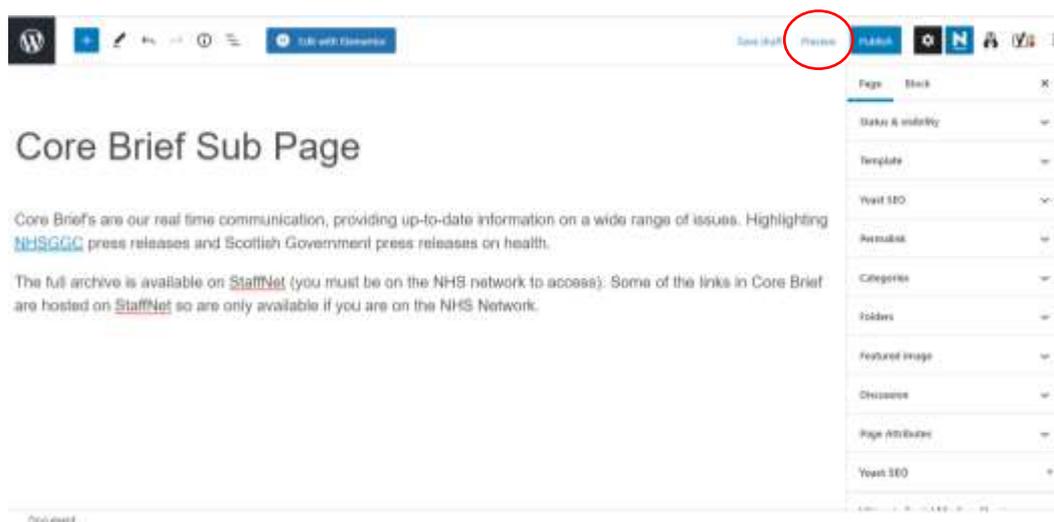
Once you have added the content to your page you will need to check the page settings before publishing the page.

To check your page settings click on the '**Page**' button when editing you're your page.



a) Saving a Draft Web Page

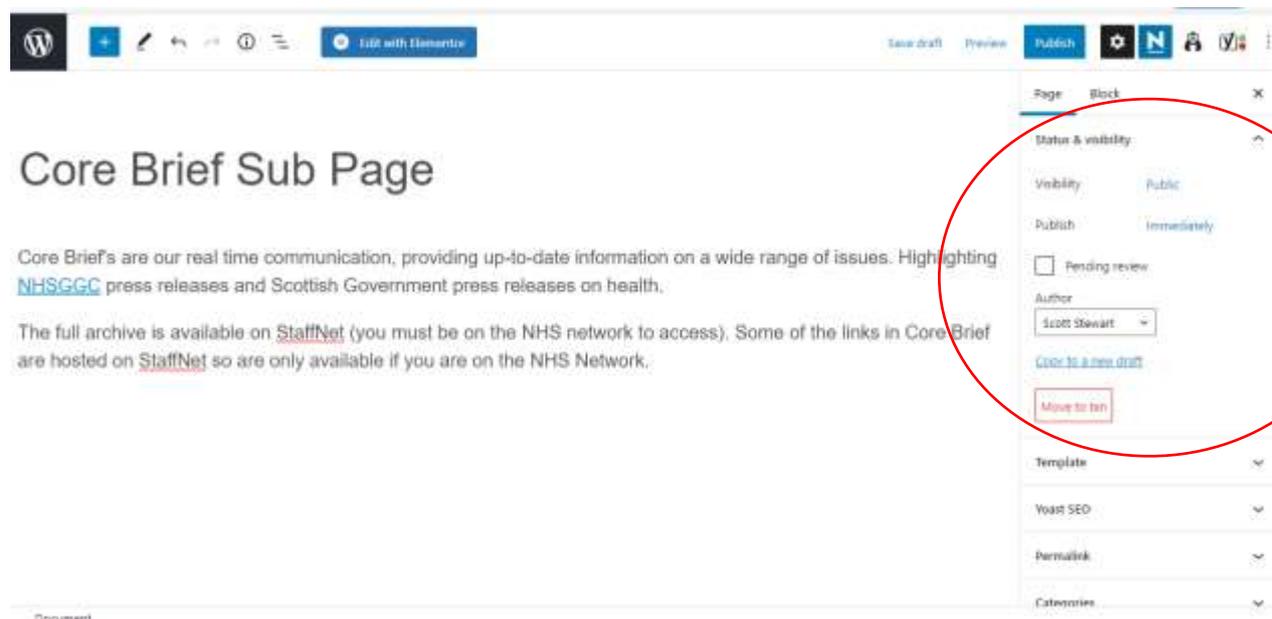
If your web pages are not yet ready to publish you can use the 'Save Draft' option next to the 'Preview' button.



Remember you should only publish your web pages once they have been reviewed and approved by your line manager or section lead.

b) Status & Visibility

Firstly you will need to set your page status and visibility.



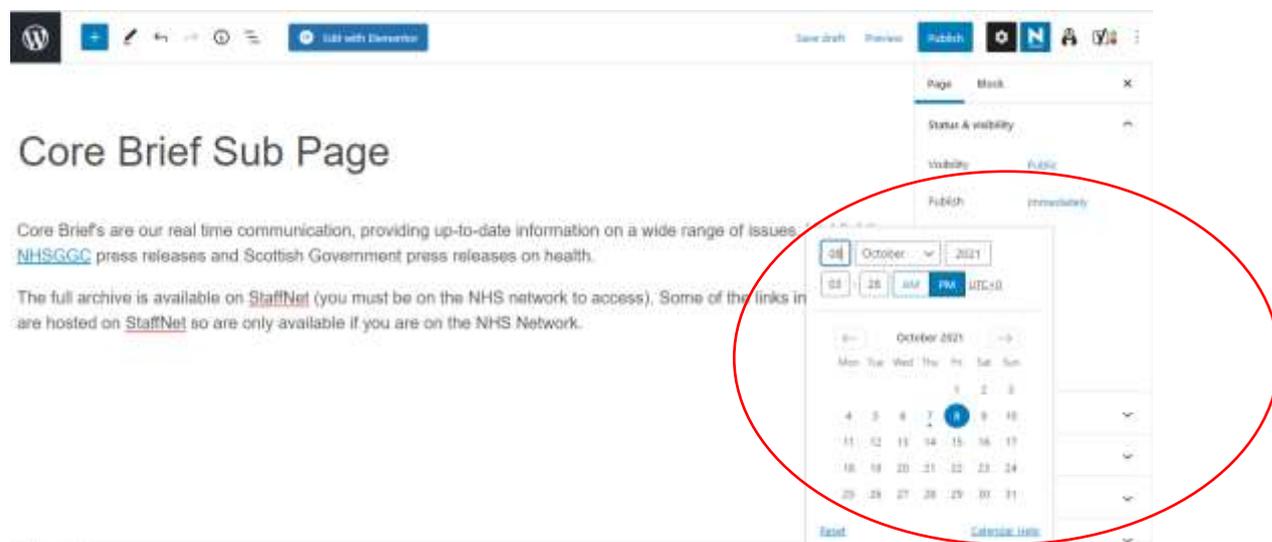
The screenshot shows the WordPress editor interface for a page titled "Core Brief Sub Page". The page content includes a heading, a paragraph about real-time communication, and a paragraph about the StaffNet archive. On the right-hand side, the "Status & visibility" settings panel is open and circled in red. The "Visibility" is set to "Public" and the "Publish" option is set to "Immediately". There is a "Pending review" checkbox which is unchecked, and an "Author" dropdown menu set to "Scott Stewart". Below these are links for "Go to a new draft" and "Move to top".

If your page is ready to go live set the '**Visibility**' to **Public** and set your '**Publish**' option to **immediately** if you would like the page to go live straight away.

If you need to keep the page private set the '**Publish**' option to **Private**.

If you needed to schedule the page to publish on a certain date and time, click on **immediately**.

This will then prompt you to choose the specific date and time you would like to publish the page on.

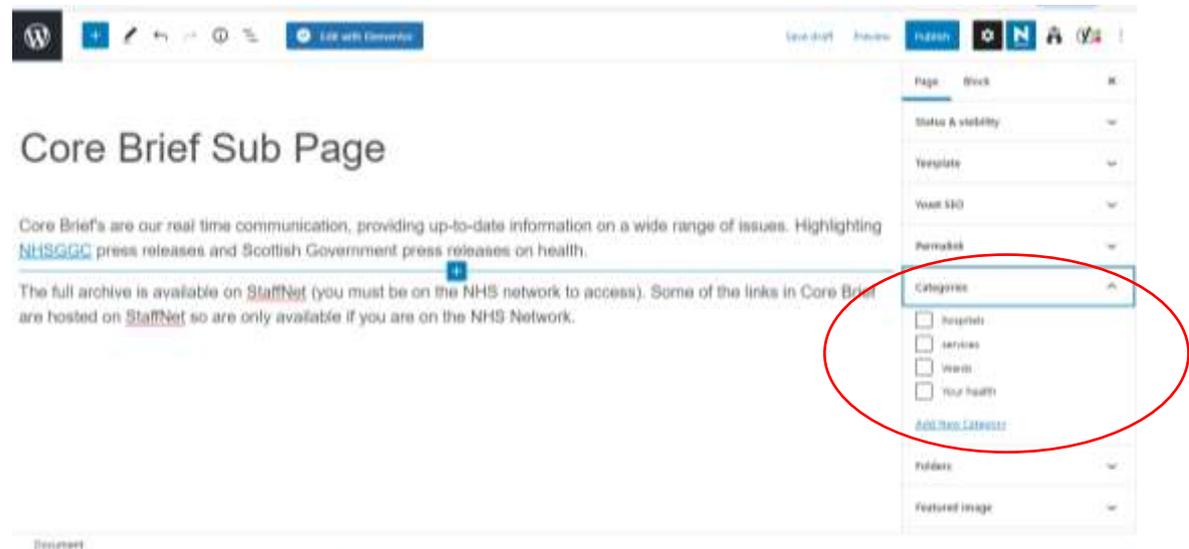


The screenshot shows the same WordPress editor interface as the previous image, but with a date and time picker overlaying the "Status & visibility" settings panel. The date picker is also circled in red. It shows the date "04 October 2021" and the time "03:28 AM UTC+0". Below the date and time are calendar and clock icons for selection.

c) Categories

We will assign a category for your webpages and will set this for you when setting up the basic pages.

Please double check your category has been ticked in this section.



d) Permalink/Slug

The permalink/slug is determined by what you add in the title section of your page. This makes up part of the link to your page.

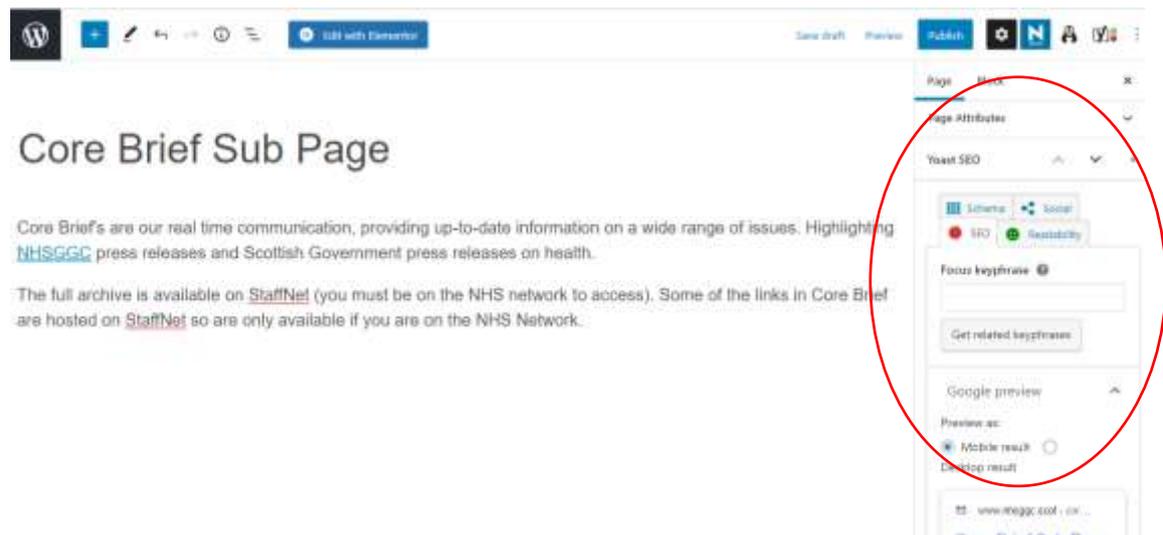
Again we will set this for you when setting up your starting pages. Please don't alter this as it may affect the links on the website.

If you require a shorter version of the URL please let us know and we will arrange for this to be set up.

e) Yoast SEO (Search Engine Optimisation)

We also have a plug in which can help with Search Engine Optimisation (SEO).

By having good SEO practice this will mean your page will be picked up better by Google and other search engines. This may also improve the search on the new website in general.



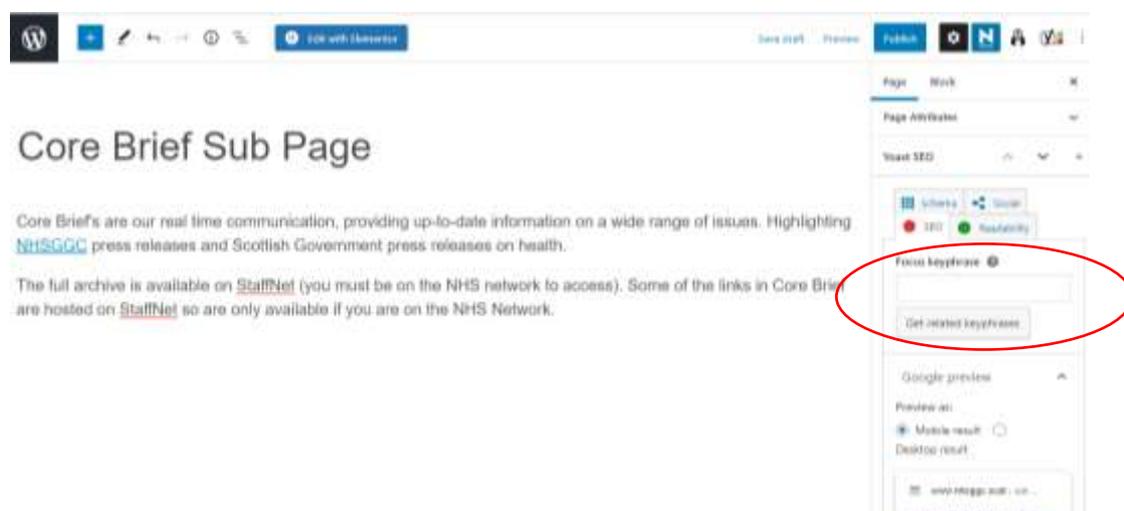
Firstly, set your focus keyphrase.

More information on how to do this below.

When the menu is opened you can then add a focus keyword.

You can find out more about what focus keyword is and how to choose one by following the below.

- [The perfect focus keyword for your post or page • Yoast](#)



Now you will need to double check the **slug**.

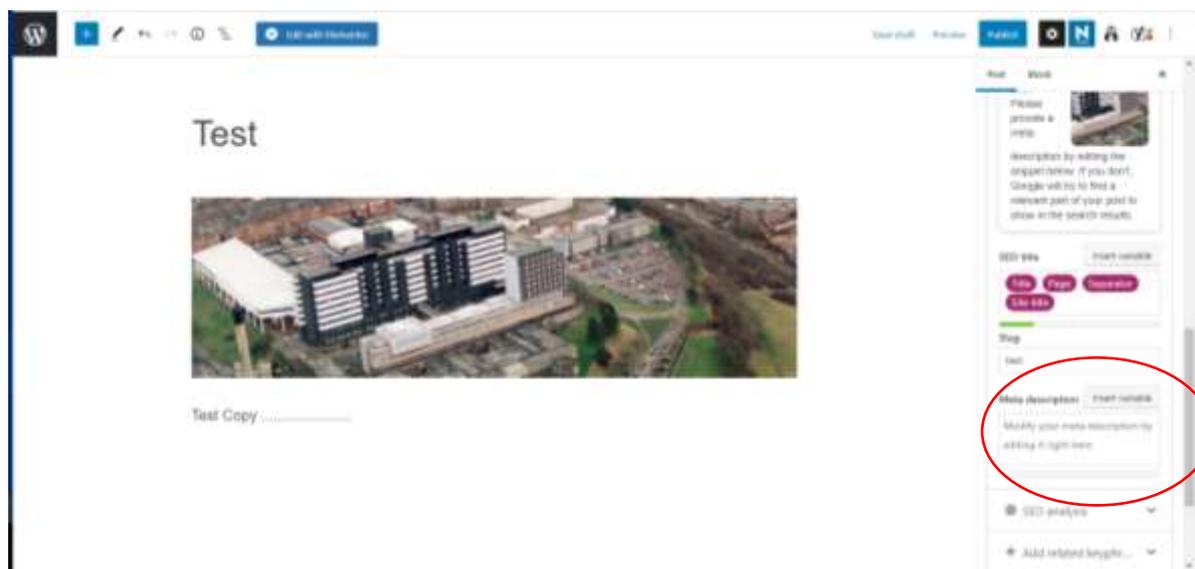
For this you can keep this the same as the current **slug** in the permalink section. Please don't change this if already generated as it will affect the Permalink we have set for your page.



Next you will need to fill out the '**Meta Description**' section.

A **Meta Description** is a brief description of what a page or news posting is about. This is also the description that is shown on the google listing for the page.

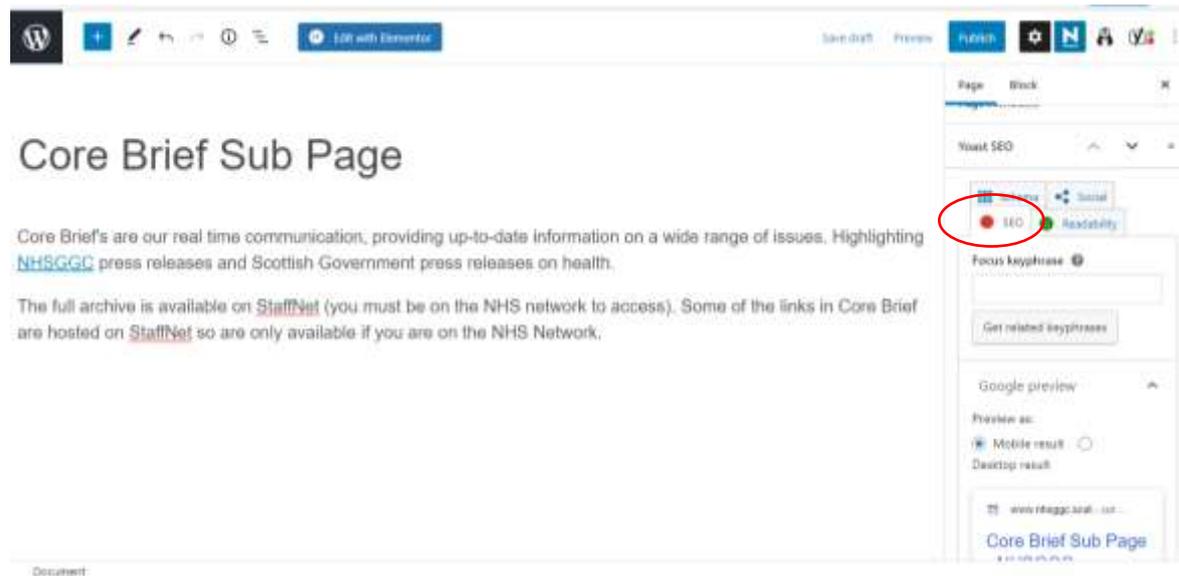
You can read more about the best practice for **Meta Descriptions** here - [Meta Description: A Quick Guide for Beginners in 2021 \(oberlo.com\)](#)



If you see a red circle next to the SEO heading this means you will need to improve your SEO.

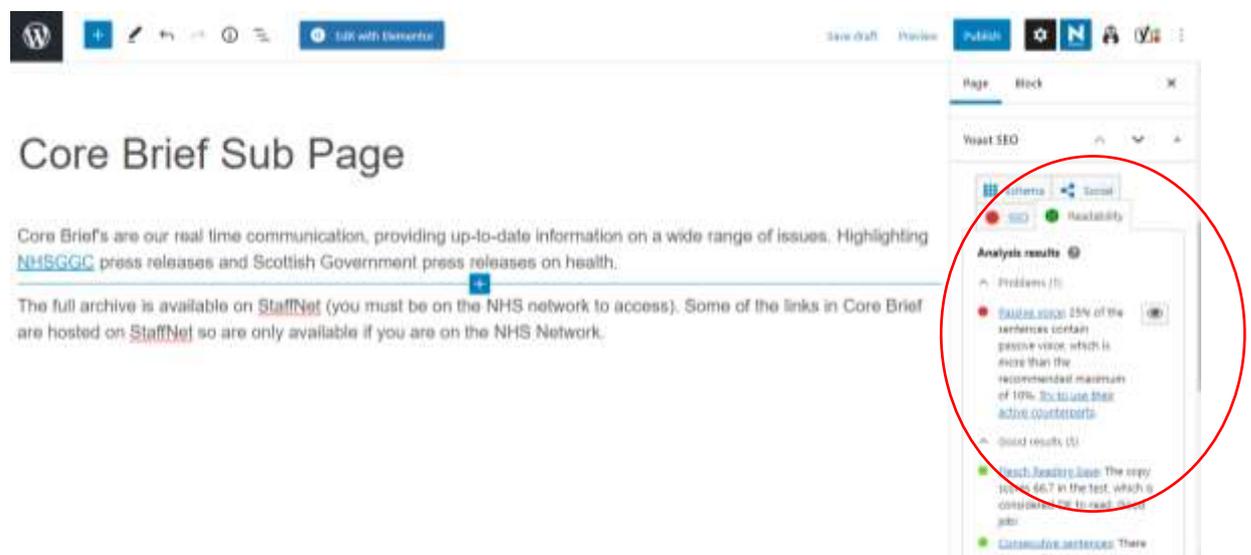
This could mean you will need to improve the keywords used in your SEO and Meta description to ensure they are relevant to the content on the page.

Keywords are vital to Search Engine Optimisation as it allows Google to see your page is relevant. Once your SEO is improved the red circle should turn green.



If you click on the 'Readability' button this will allow you to see how you can improve the text and copy used within your page.

Again your readability is scored so if you improve the copy used on your page the red smiley face should turn green.



Below are some tips on how to get a better score:

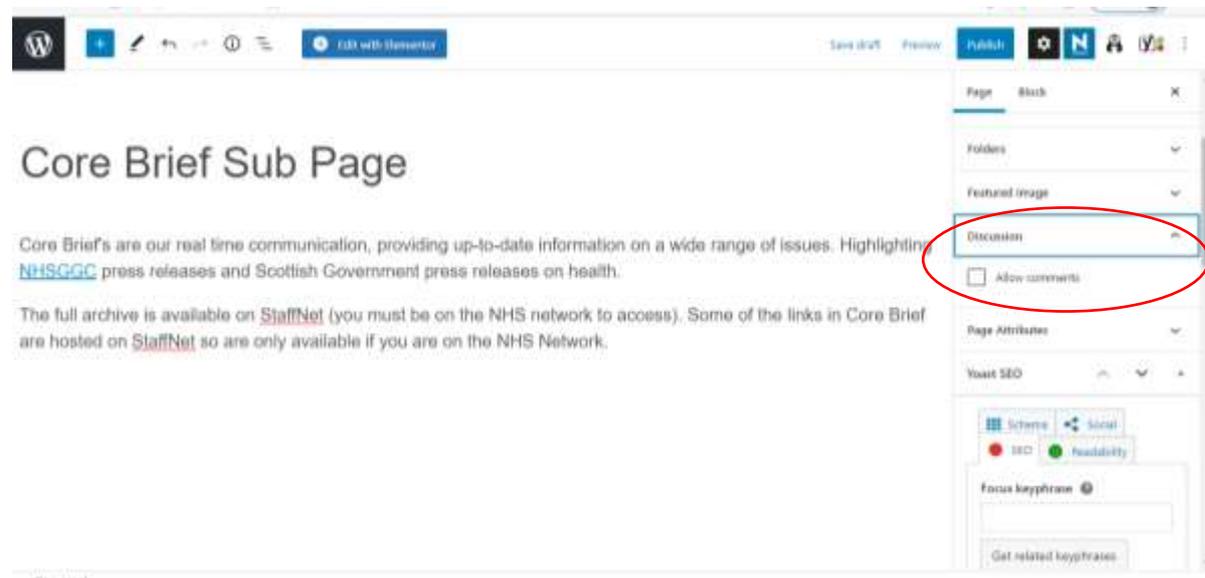
- Use short sentences & paragraphs which are easy to follow.
- Use keywords that are relevant and related to the main focus/content of your page
- Avoid using complex wording as we are always aiming to ensure the content on the page is simple and clear to our readers.
- Use H2 & H3 headings where appropriate to section your content properly.
- If you have content which uses acronyms please ensure when that word is used have the full word written first followed by the acronym in brackets. Then you can refer to the acronym instead of the full word where appropriate.

Please also refer to our Writing Guide for the Web which will help you in improving the readability score on your pages.

f) Discussion/Comments

If you click on the Discussions section you will see the 'Allow Comments' box unticked.

Please keep this unticked as this prevents people from putting comments on our pages.



g) Publish & Update

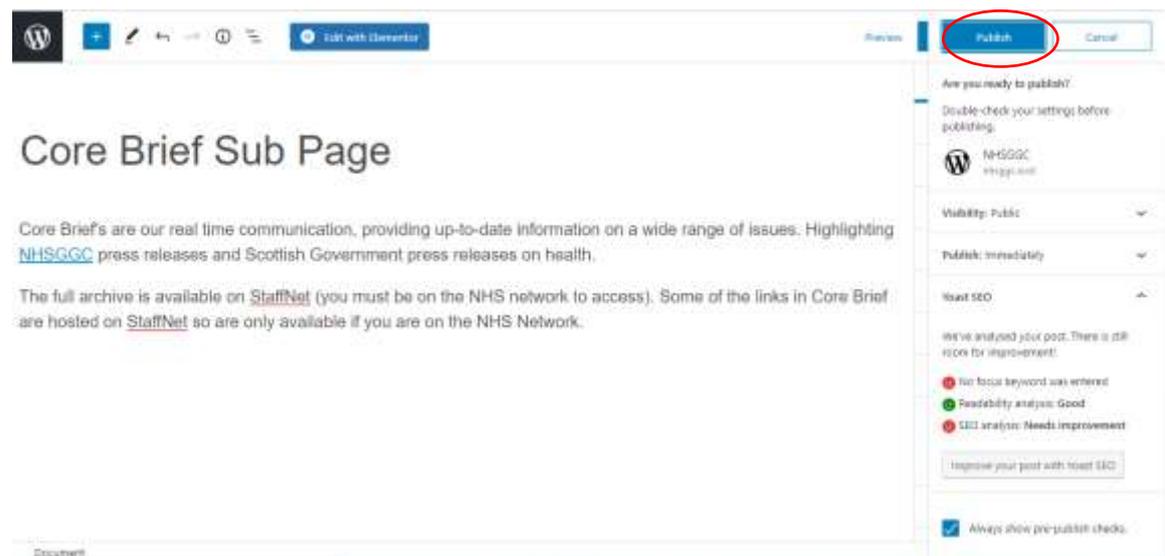
Once you have worked on the above settings you should now be ready to publish your page.

Before publishing your page you can preview it by clicking the button highlighted below.

You can preview what your page looks like on Desktops, Mobiles and tablets. This will be useful to ensure your page is mobile and tablet friendly.



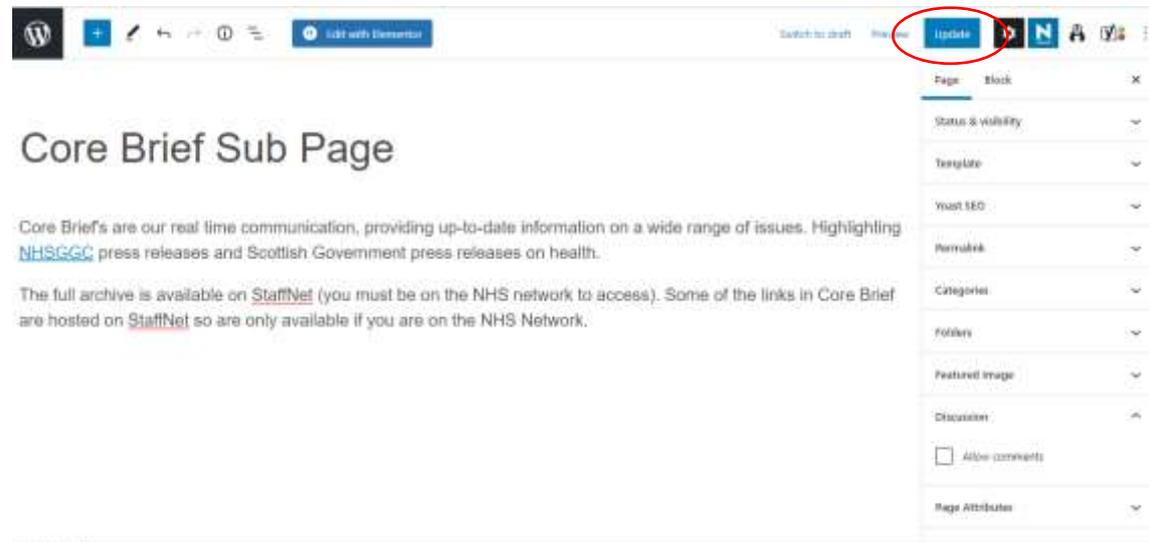
If you click publish at the top of the page this will allow you to review your publish settings.



This gives you another chance to ensure you have set your page to public and set your page to publish now or schedule a time for the page to be published.

You will also see if your SEO is good as well as your readability.

Once you publish your page you will now see the publish button has changed to an update button.



Note that the update button is now the button you will press to publish any changes you make to that page in the future.

5. Document Collections and Archive Listings

Document listings usually contain document collections or archives, such as Core Briefs, Board Papers, operating procedures, policies, guidelines, reports, etc. Once set up, you only need to add a new document, and it will automatically appear on the document listing page.

If you currently have, or require a document listing page, please let the Webteam know, so they can set this up for you. Once it's ready, you will be provided with additional guidance so that you can begin uploading your documents.

A good example of this type of listing page can be found on [NHSGGC's Core Brief page](#).

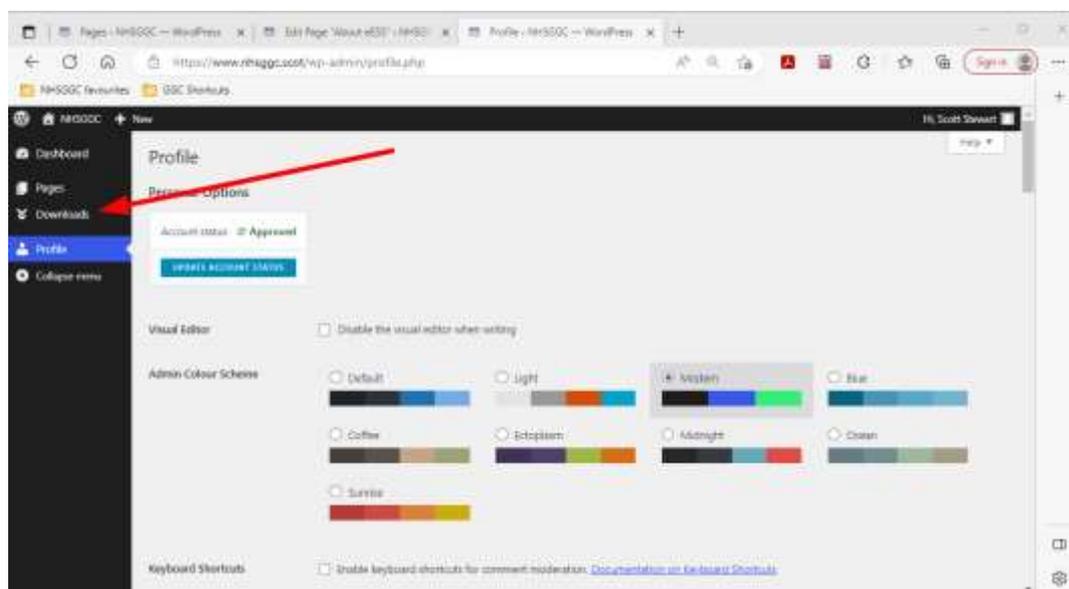
This section provides guidance on how to upload and add documents to your listing page once it has been set up for you.

We have used the Core Briefs section as an example for this.

Uploading Files

Firstly, make sure you have your files at hand and ready to upload.

Now click on the 'Downloads' tab on the right hand menu.

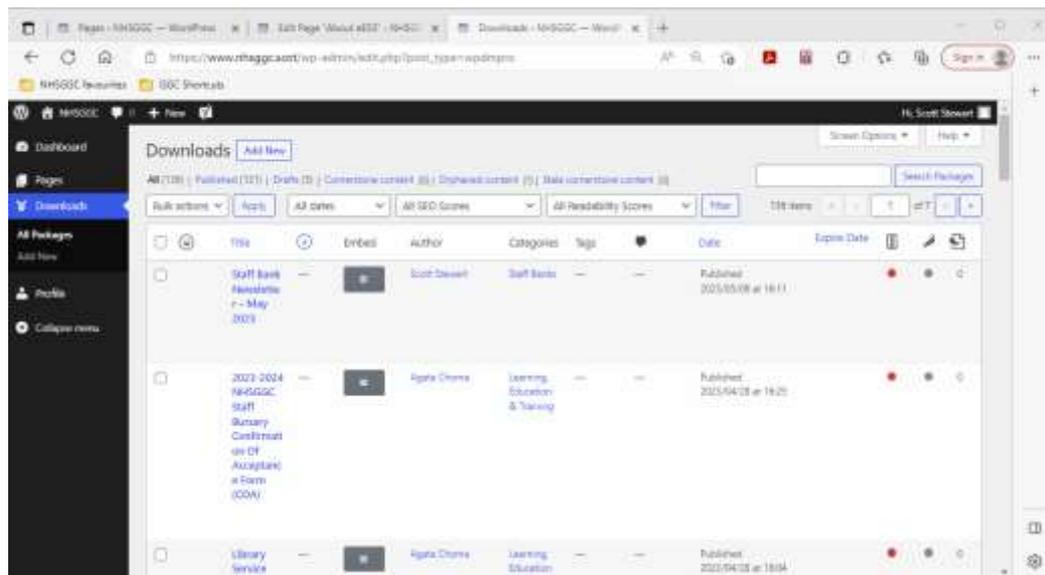


Once opened you will see the below, with all documents you have access to edit on the central area of the editor.

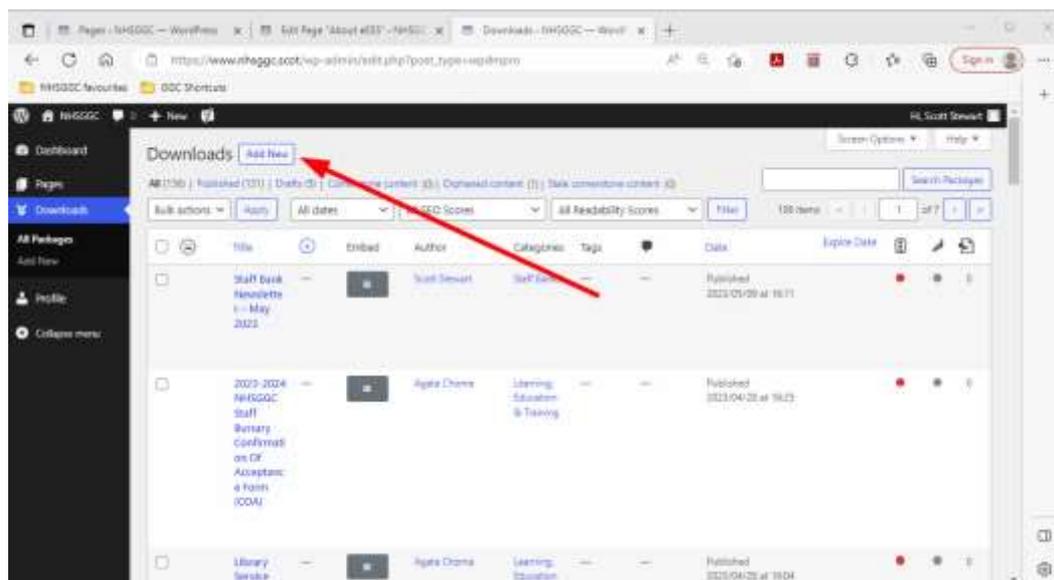
At the moment we are working on a solution to help filter documents by category, this will help when you are looking to search for documents to update or make changes.

On this screen you will see any documents tagged to the permission category groups by you or fellow editors in those permission groups.

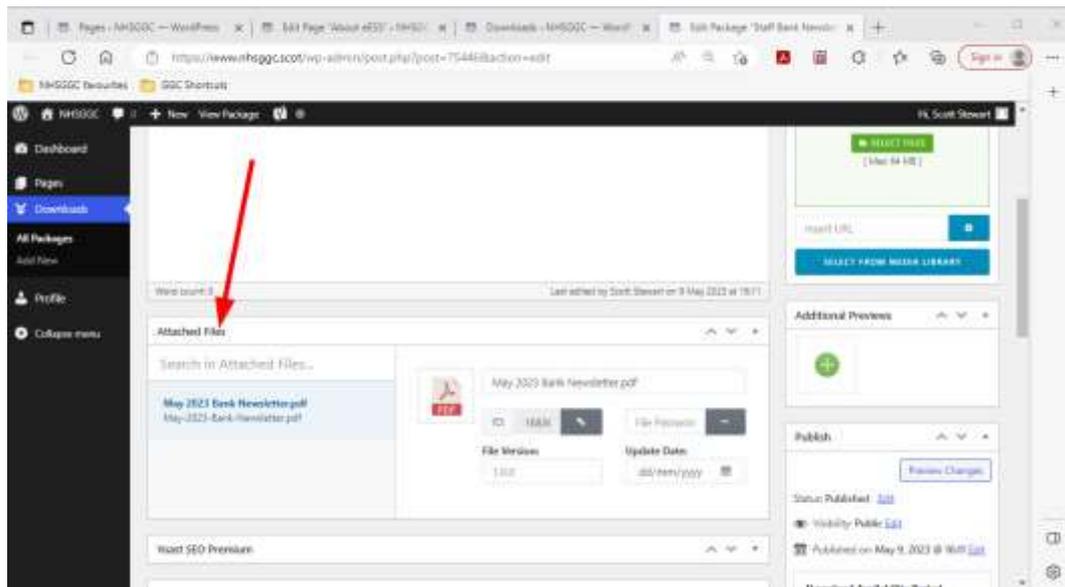
Here are the video steps on how to navigate to the documents / downloads area - <https://www.youtube.com/watch?v=61gPSDaZlAY>



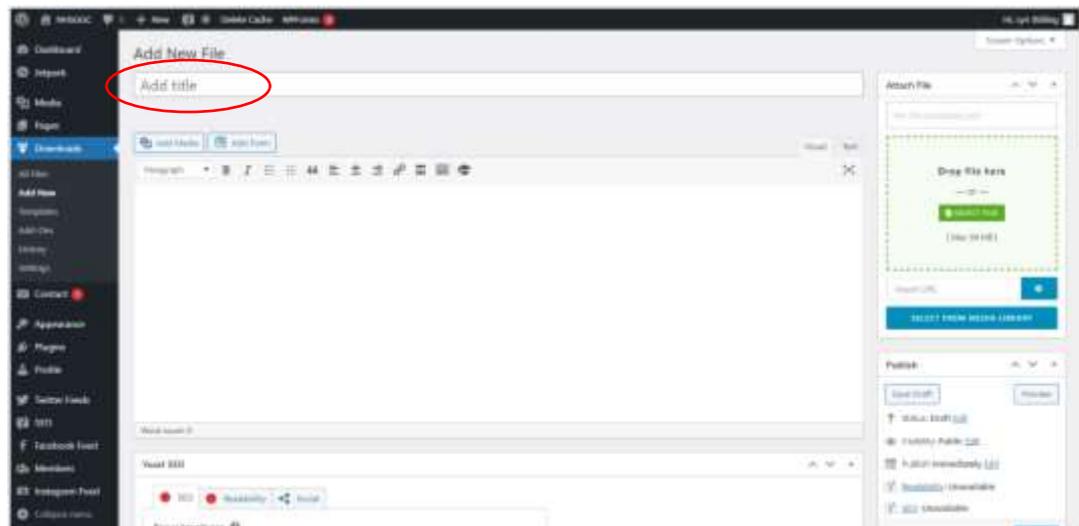
To add a new file upload select the 'Add New' button.



Your file should then appear in the 'Attached Files' tab as shown.



In the 'Add Title' Section this is where you will name the file using the following naming conventions that are relevant to that file:

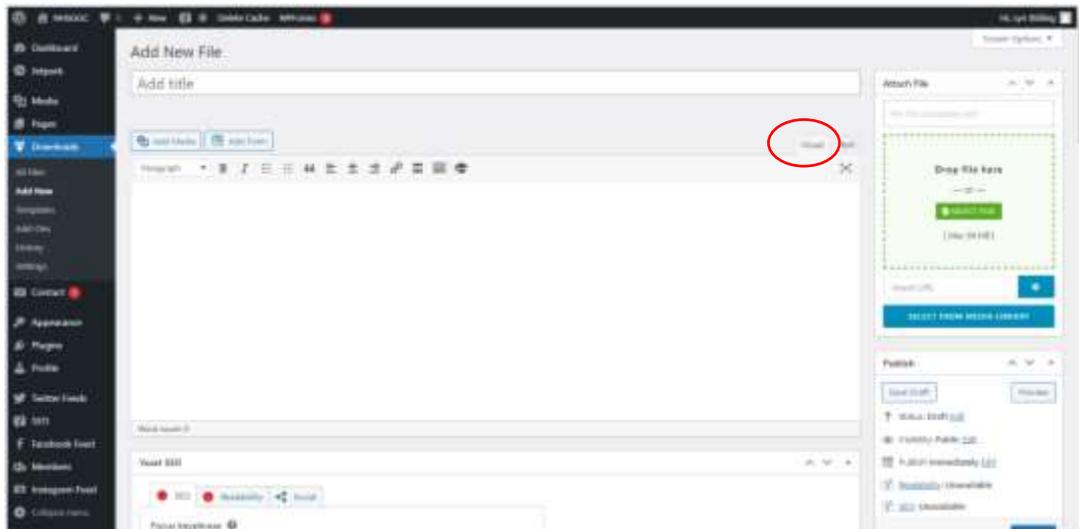


Naming Conventions

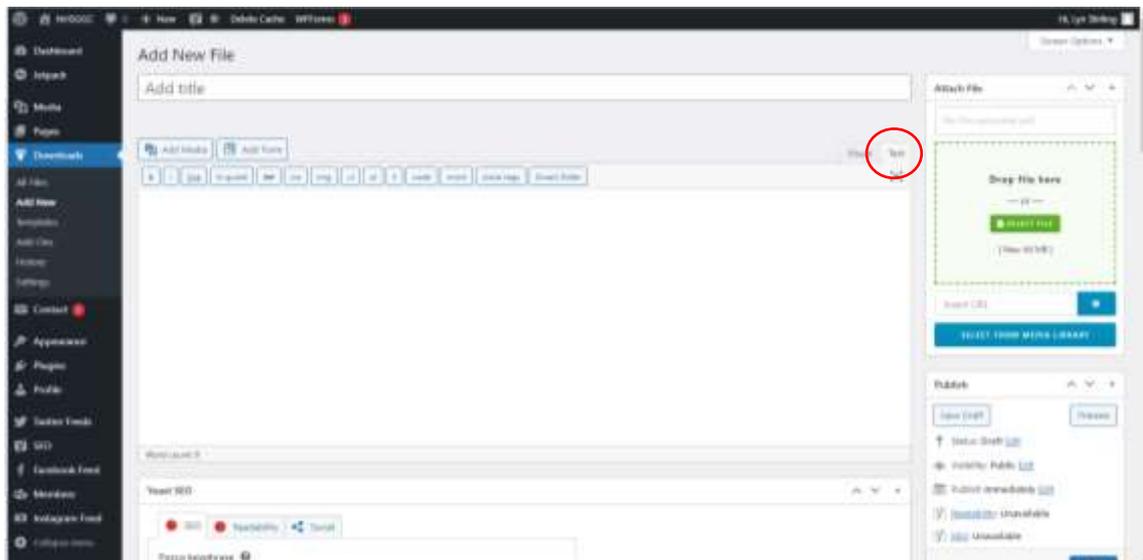
Once we set up your folder and document library listing we will provide you with the correct naming conventions for adding your title.

Now you can add in the description of the file if you have one, to do this copy your description please make this as short as possible.

Click the visual button below and add in your description.



Now click on the 'Text' button and again add your description on here.

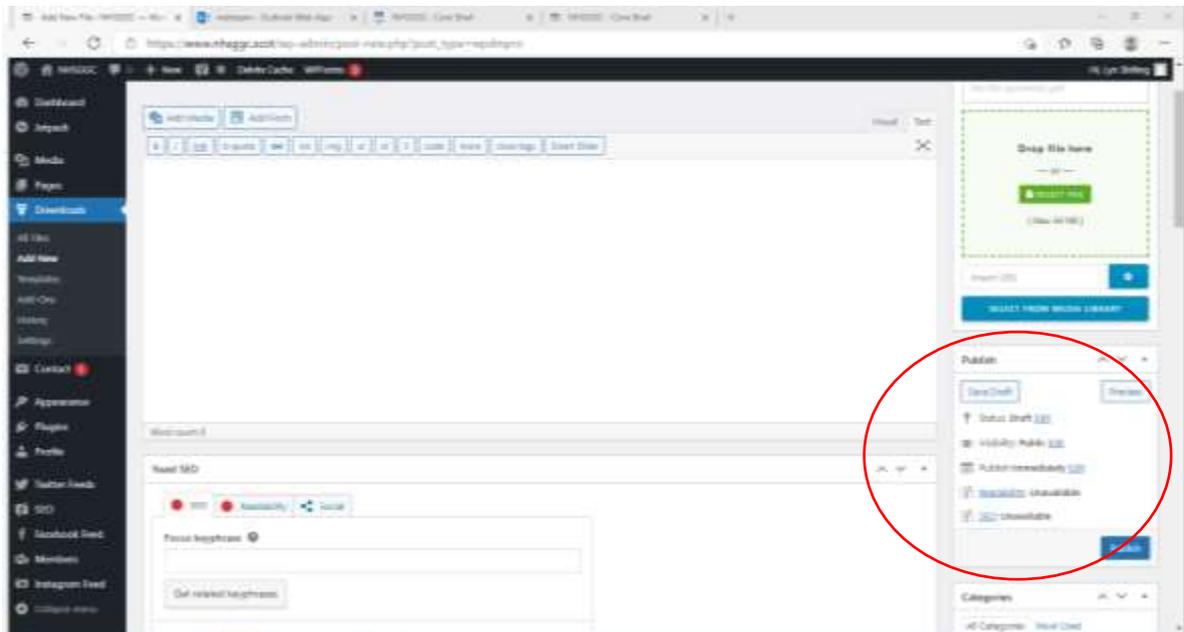


Now that your description has been added you need to assign the categories specific to that core brief.

To assign your categories scroll down and you will see this on the right hand menu.

We will advise what categories you need to select.

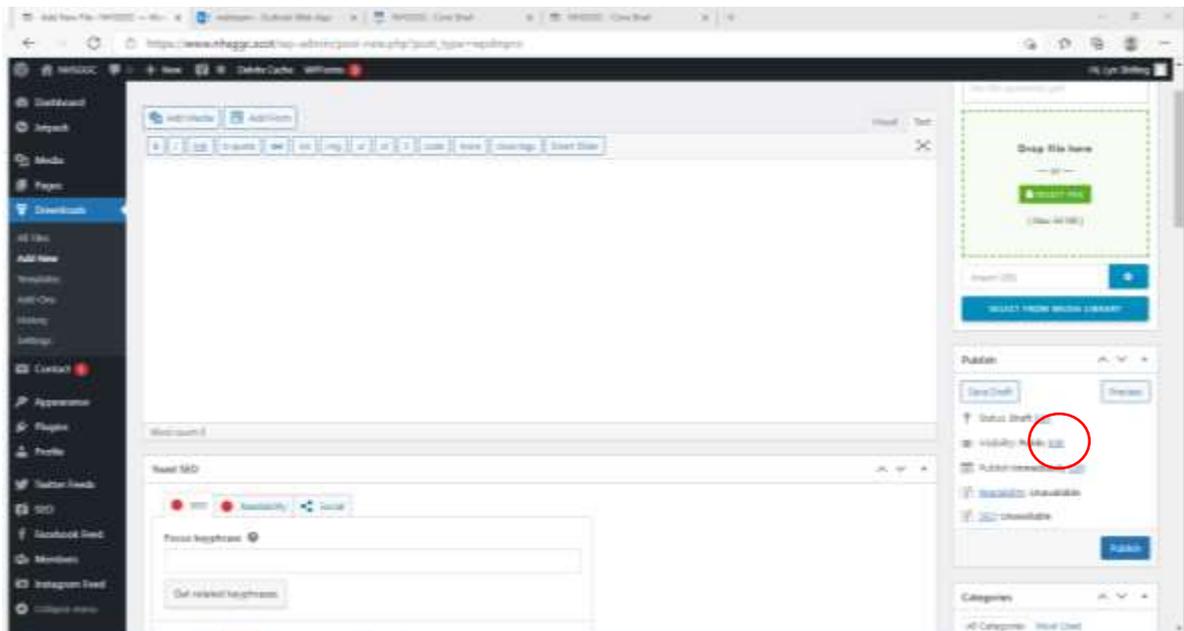
Once you have assigned your categories you can now scroll up to the publish menu box.



Here make sure your visibility is set to public.

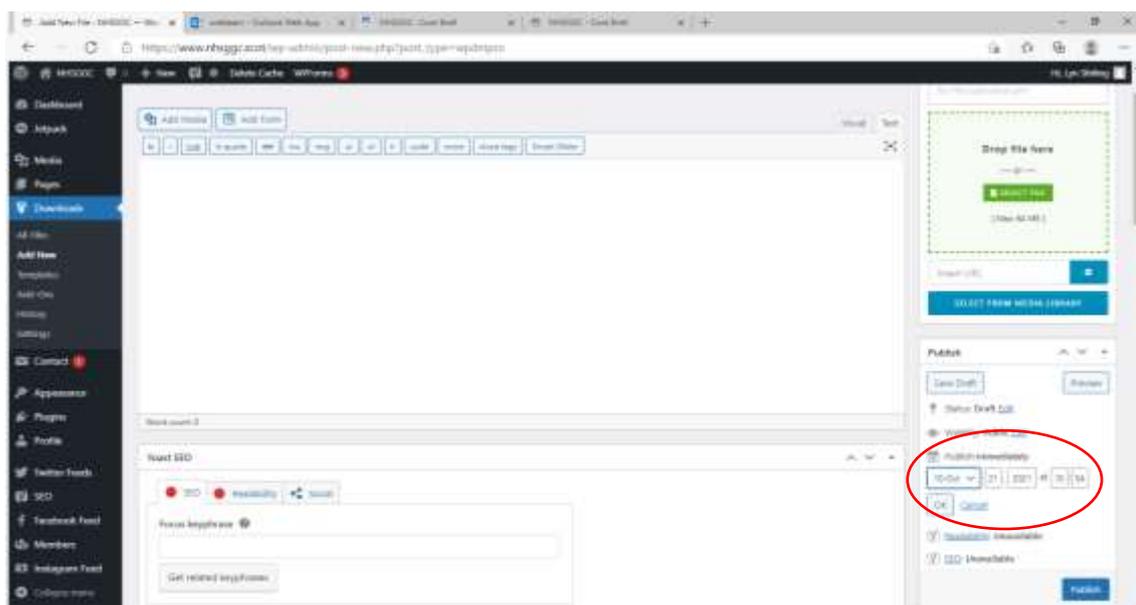
If you are sending that file out immediately again make sure the publish option is set to immediately.

If you are uploading an older file click on the 'Edit' button on the publish section.



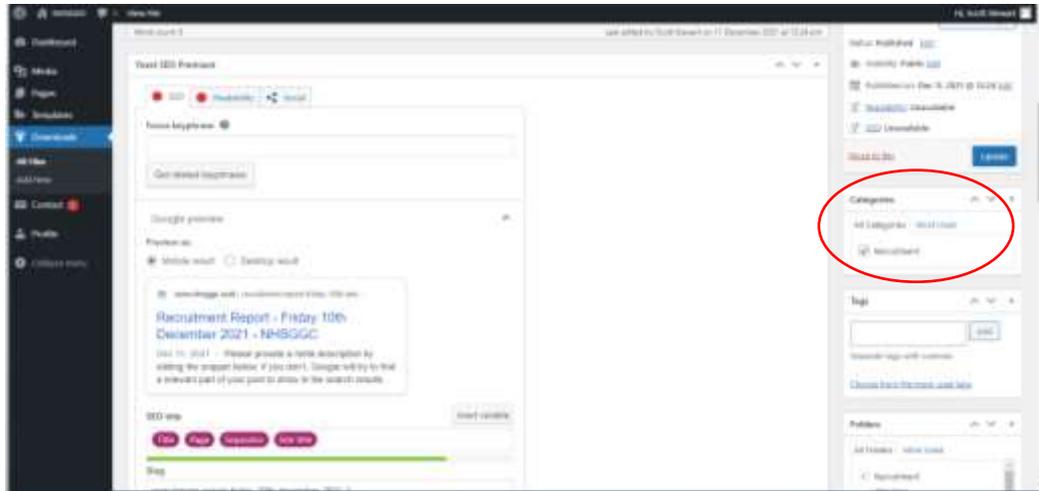
This will then allow you to go back and select the original date and time that file was posted on the old website.

Once you have set the publish date and time you can then click the OK button.



Categories

Please also scroll down to the categories section and ensure your assigned category has been clicked. This will ensure that you and those in your team can see the files uploaded under your assigned category.



Once you have set your publish settings, date and visibility you can then click '**Publish**'

If you then click the '**Downloads**' tab on the left menu and navigate to the folder you should see it has been uploaded.

You can also set a future publish date or time if the file is embargoed, or you wish it to go live at the start of a campaign etc.

Updating Documents on WordPress

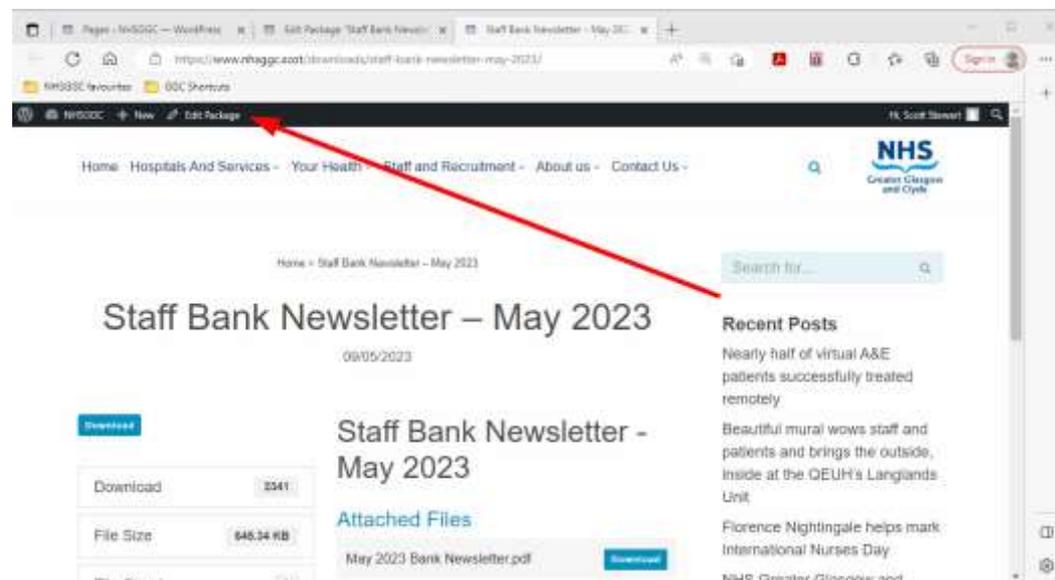
If you need to edit a file on WordPress or update the version, navigate to the Downloads area and search for that file.

Once you find the file select the edit button and follow these steps on how to update a document version - https://www.youtube.com/watch?v=ROD0uVBt_QM

Quick Editing and update document files on WordPress

You can also quick edit files on WordPress. To do this make sure you are logged in to WordPress, then view the live / front end version of the document.

You should again see an 'Edit Package' button at the top toolbar.



Now follow these steps to update the document without the need to go in to the Downloads area on WordPress - <https://www.youtube.com/watch?v=GZysOH4lu74>

Note: If you update the version of a document on WordPress you don't need to change the link if it is on any of your pages or materials as it automatically updates on the front end for you.