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WordPress Publishing Checklist

The following is a checklist of the content publishing workflow in WordPress. Print this to review each step in the publishing process before hitting the publish button. (Note: Site titles referenced on links for printed versions of this document.)

1. **Add New Post/Page:** To create a new post or page, see "How to Add Posts and Pages in WordPress" and "How to Edit a Post or Page" on ClarkWP Magazine.

2. **Add the Title:** Write the title first. If you leave it blank and publish the article, WordPress will not use the post title for the article address. It will use the post ID number and the post title will be blank.

   a. Post titles are typically in *title capitalization*, not lowercase or all caps.

   b. Rarely include punctuation other than quote marks, question marks, commas, and exclamation points.

3. **Write the Article:** Write the article in the editor. There are two editors in WordPress:

   a. **Visual Editor:** The Visual Editor is the most commonly used, and the most troublesome for professional bloggers. It is a WYSIWYM Editor (*What You See Is What You Might Get*). If you are more complicated than simple text, consider using the Text Editor. If you choose to copy and paste from another source such as a text editor or word processor, remember to paste from the word processor into WordPress using the Text Editor or **the Paste from Word option** (ClarkWP) on the second row of the Visual Editor toolbar.

   b. **Text Editor:** The Text Editor is used mostly by coders and professional bloggers publishing code in hand-written HTML (Lorelle Teaches). See "Writing and Publishing Code in Your WordPress Blog Posts" on the Blog Herald and "How to Add HTML in a WordPress Blog Post" on Lorelle Teaches for more information on using the Text Editor.

4. **Add Links:** Add links in properly formed HTML links (Lorelle Teaches). All links are required to have a title attribute describing the destination of the link. *Make sure no links are set to open in a new tab or window.* See this article on creating links in the Visual Editor on ClarkWP Magazine for help creating a link, and this ClarkWP article on creating and using jump links to create a table of contents or a jump link on a single post or Page.

5. **Add Link Citations:** If you quoted or used content such as images or video that is not your original content, ensure the article features proper citations and credits (Lorelle Teaches) to the source and original copyright holder if possible.

6. **Add Lists:** If your article calls for it, add a list to your post (ClarkWP). Any time you publish a list, numbered or unnumbered, put it in an HTML list.

7. **Add Images:** Add images using the **Add Media** feature.

   a. Ensure all image file names comply with web standards as "Steve and Sally in the swimming pool.jpg," "Steve-and-Sally-playing-tag-on-lawn.jpg," or "Sunset over Manzanita, Oregon, beach - photography by Brent VanFossen." Spaces may be replaced with dashes or underlines. Files named 43569807.jpg or DCN549803.jpg are not acceptable.

   b. Write the **Alternative Text (ALT)** for the image in a simple, concise, but complete sentence with a period at the end. Describe the picture as if you couldn't see it. *This is required by law.*

   c. Set the **Attachment Display Settings** properly for image alignment, size, and *set as an attachment*.

8. **Add Video:** If the article needs video, see this tutorial on how to embed videos into WordPress.com from WordPress.tv.

9. **Set the Excerpt:** Locate a spot about one to three paragraphs into the article and place the **MORE** feature in between paragraphs or at the end of a paragraph to set the excerpt point. Posts that are 2-5 short paragraphs in length do not need to use the More feature.

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10. **Select Categories:** Place the post in the most appropriate and related category on the site. You may choose more than one category, but be judicious. Ask yourself how someone would best find this content on your site.

11. **Add Tags:** In the tag module, type in the words and phrases for the post separated by commas.

    a. These are keywords, words people will use to search and find the article.

    b. You may use one word or a short phrase, usually no more than 4 words.

    c. WordPress will offer auto-suggestions based upon previously entered tags. Select the tag from the list to add it to your list.

    d. Click **ADD** to add the tags to the post. If you add a tag that isn't right, or spelled wrong, click the X next to the tag to remove it from the post.

12. **Theme and Plugin Features:** If the site depends upon WordPress Theme and Plugin features, apply those now. This may include SEO, additional content, styles, author information, custom fields, and other content publishing settings.

Publishing Procedure

1. **Save as Draft:** Save the post. This sends the information to the database to preserve it until you make changes.

2. **Preview Post:** Click the *Preview* or *open the View Post link in a new tab*. Switch to that tab leaving the Post Edit tab open. **NOTE:** If you are writing in the Text Editor, do not use the Visual Editor to preview the post.

    a. Does the post look the way you want it. It is error free? If you have an editorial style guide, review it now.

    b. Switch back and forth between the two tabs to edit, save the draft, switching to the preview tab and refresh to see changes, until you get it the way you wish the content to appear.

3. **Add the Featured Image:** If the WordPress Theme or your site project calls for it, add a featured image. Look for the **Featured Image** module on the edit post panel and add an image. It may be an image from within the post or an newly uploaded image representative of the post content. Your WordPress Theme may have specific size requirements so check and note that information on this checklist.

4. **Set Publish Options:** Depending upon the assignment and the needs of the author, client, or site, set the **Publish** options for **Visibility** as public, private, or sticky post. If the post is to be published in the future, set the **Published On** date and time. If this is a multiple contributor site, you may need to set the post as **Pending** for editorial review before publishing.

5. **Last Check Then Publish:** Ensure you have added the title, more, categories, and tags. Check that all images are set as attachments, aligned properly, and feature titles and alternative descriptions as required in this class and by law. Take a last look at the preview of the post to ensure it meets the criteria of the assignment. If it does, hit **Publish**.

Web designers and developers create a similar workflow list as a checklist for their clients to help them remember each step in the web publishing process. Each workflow list is customized for the client's needs and the WordPress Theme they are using.

WordPress Resources

- Learn WordPress: http://learn.wordpress.com/
- WordPress Codex: http://codex.wordpress.org/
- WordPress.tv: http://wordpress.tv
- Lorelle Teaches: http://lorelleteaches.wordpress.com/
- Lorelle on WordPress: http://lorelle.wordpress.com/
- One Cool Site: Blogging Tips by timethief: http://onecoolsitebloggingtips.com/
- ClarkWP Magazine: http://clarkwp.wordpress.com/