



## SOP for User Management in WordPress

### Procedure:

#### Creating User Roles and Permissions

- Step 1: Assess the need for custom user roles beyond the default roles provided by WordPress (Subscriber, Contributor, Author, Editor, Administrator). Consider the specific capabilities required for each role.
  - Tools/Resources Needed: WordPress admin access, user roles and permissions planning document.
  - Tips: Use plugins like "User Role Editor" for creating custom roles and managing permissions if the default roles do not meet your needs.
- Step 2: To create a custom role, navigate to the user roles management plugin (if installed) and select the option to create a new role. Define the capabilities by checking the appropriate permissions.
- Step 3: Save the new role with a clear, descriptive name that reflects the role's responsibilities within the website.

#### Adding New Users

- Step 1: Log into the WordPress admin dashboard and navigate to "Users" > "Add New."
- Step 2: Fill in the required fields, including username, email, first name, last name, and website (if applicable). Generate a password or let the user generate their own by checking the "Send the new user an email about their account" option.
- Step 3: Assign the appropriate user role from the dropdown menu based on the user's responsibilities.
- Step 4: Click "Add New User" to create the account. The new user will receive an email with login details if the option to email the user was selected.
  - Tips: Encourage users to change their passwords upon first login for increased security.

#### Managing User Profiles

- Step 1: Users can manage their own profiles by logging in and navigating to "Users" > "Your Profile" or can be managed by an administrator by clicking on "All Users," hovering over a user, and clicking "Edit."
- Step 2: From the profile editing screen, users or administrators can update information such as email addresses, names, and passwords. Additional profile fields can be filled out as necessary.
- Step 3: At the bottom of the profile page, users can adjust their visual editor preferences, admin color scheme, keyboard shortcuts, and toolbar visibility.
  - Step 4: To save changes, scroll to the bottom and click "Update User."

Safety/Compliance Considerations: Ensure that user roles and permissions are granted according to the principle of least privilege, providing users with the minimum level of access necessary to perform their duties. Regularly review and audit user roles and permissions for compliance with security policies.