How to Create a Publishing Workflow for Authors in WordPress

Workflows · https://publishpress.com/knowledge-base/publishing-workflow-wordpress/

We received an email from a PublishPress user who wanted to set up a content workflow for their team.

This list below shows the workflow they wanted. Administrators will assign content to Authors who write the content and then submit it back to the Administrators for publishing.

- I will add people to an "Authors" user group. Their permissions will be to send content to statuses such as "In Progress", "Draft", and "Pending Review".
- When an Author has finished their work, they will move it to "Pending Review".
- When a post moves to "Pending Review", the administrators will get notified that post is ready for review.
- Based on the PublishPress Checklists, a number of things must be done before publishing the post: correct category selected, correct tags added, etc.

Let's show you how this is done in PublishPress:

Step #1. Install the Plugins

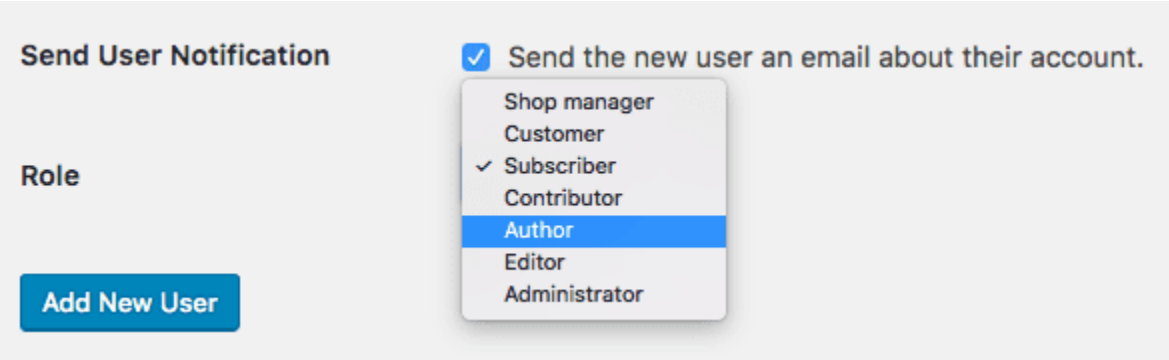
For this tutorial, we'll be using three plugins:

- PublishPress Planner
- PublishPress Capabilities Pro
- PublishPress Checklists

Step #2. Add user to a role

Our next step will be to create some authors who will write our content.

- Go to Users > Add New.
- Create new accounts for each author.
- When creating the account, place the users into the "Author" role.

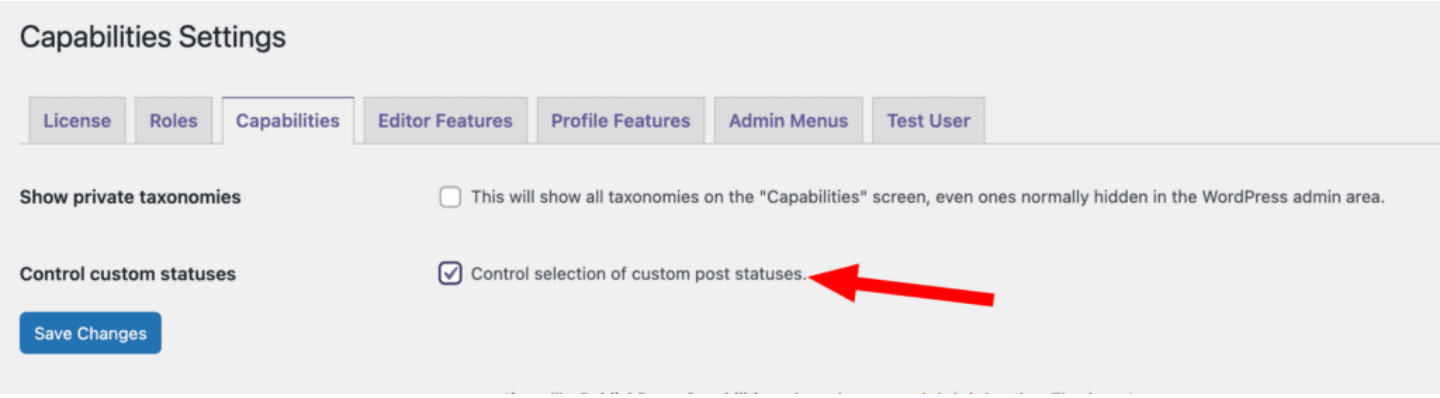


Step #3. Permissions for Authors

Now we're going to control what authors can and can not do. If you're new to WordPress, here's a guide to what authors can and can not do in a default WordPress site.

The PublishPress Capabilities Pro plugin is the way you can customize the default Author permissions. This add-on controls which statuses are available to user roles.

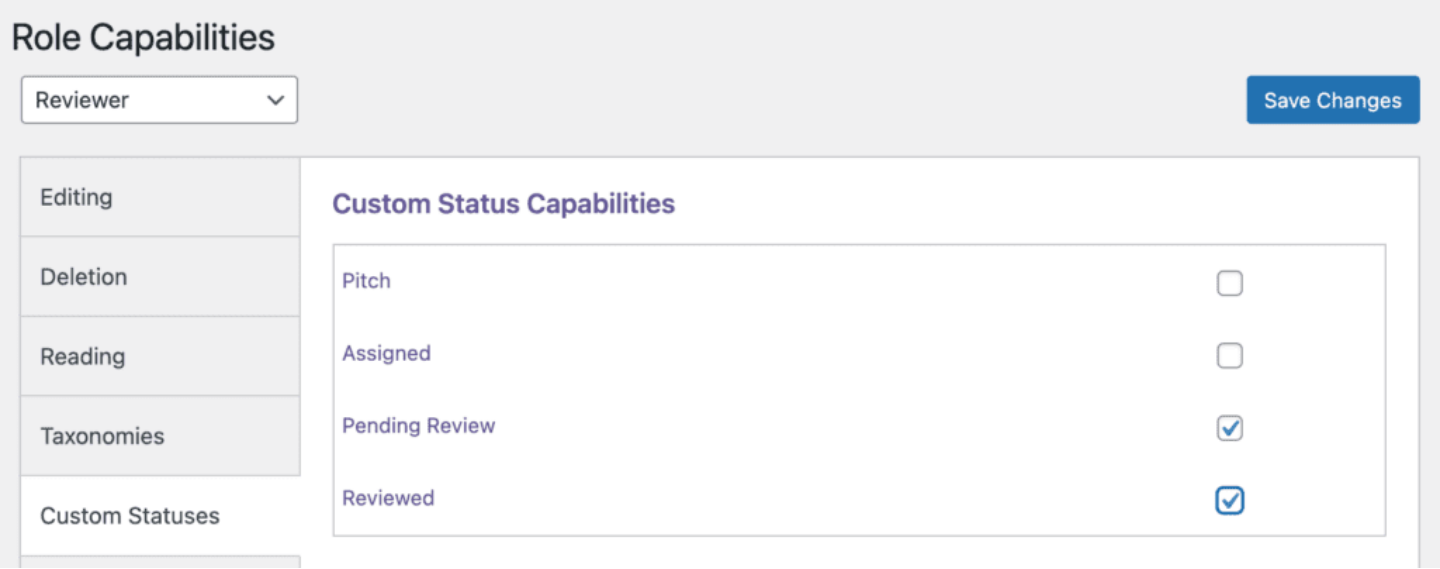
- Go to "Capabilities" then "Settings" in your admin menu.
- Check the box "Control Custom Statuses".



- Go to "Capabilities" in your admin menu.

In the center of the screen, you can now customize permissions for statuses.

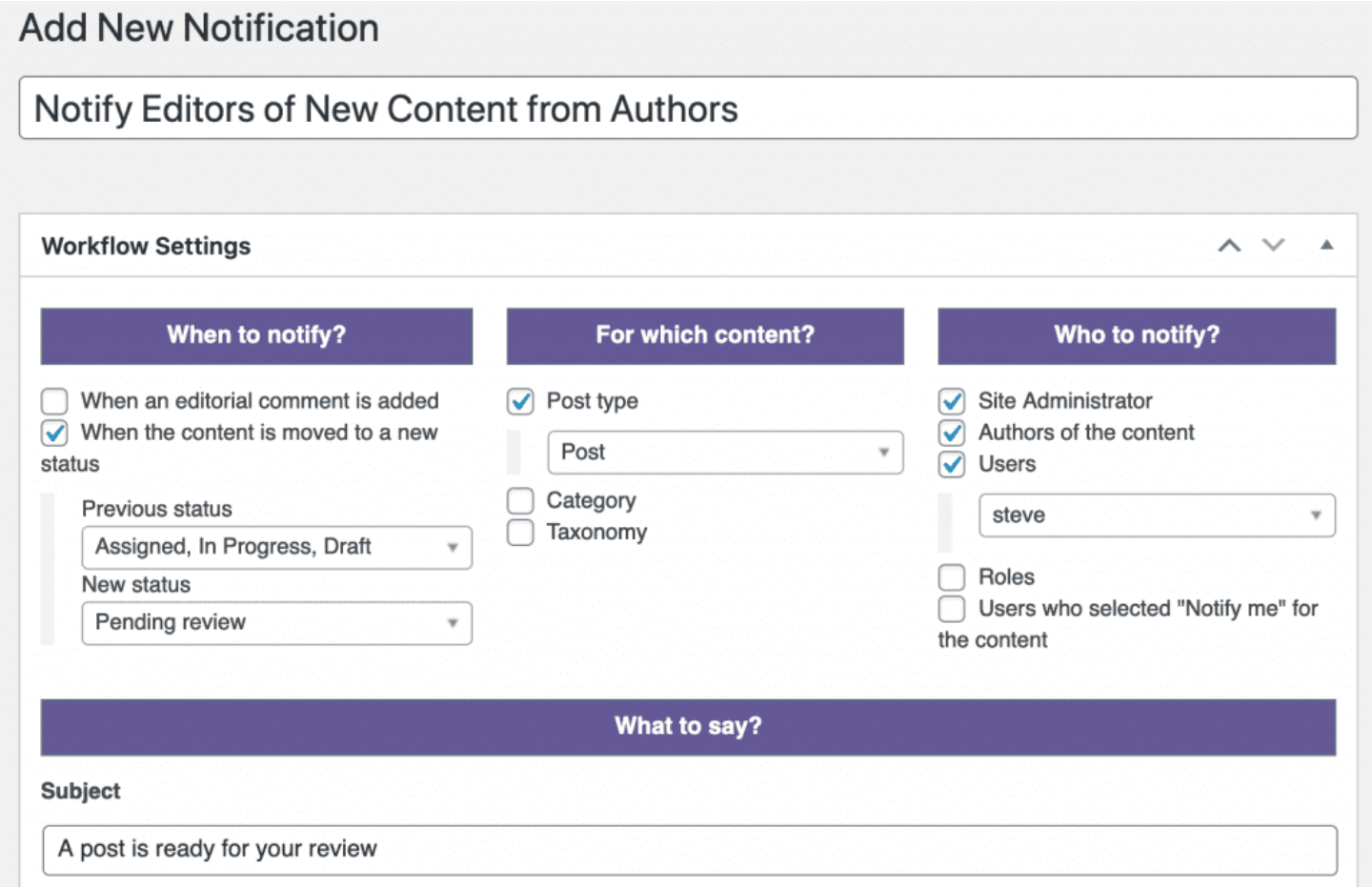
- Use the “Select Role to View / Edit” box to load “Author”.
- You can now set permissions for custom statuses:



Step #4. Notifications for Administrators

Now that our permissions are ready, let's set up notifications so that everyone gets notified at the right times.

- Go to PublishPress > Notifications.
- Click "Add New".
- **Title**: Notify Editors of New Content from Authors
- **When to Notify**: Here you can choose to notify people when content in "Assigned", "In Progress" or "Draft" is moved to the "Pending Review" status.
- **Filter the content?** Choose "Post" as the Post type.
- **Who to notify?** Choose the people who will approve the content.



Notify Editors

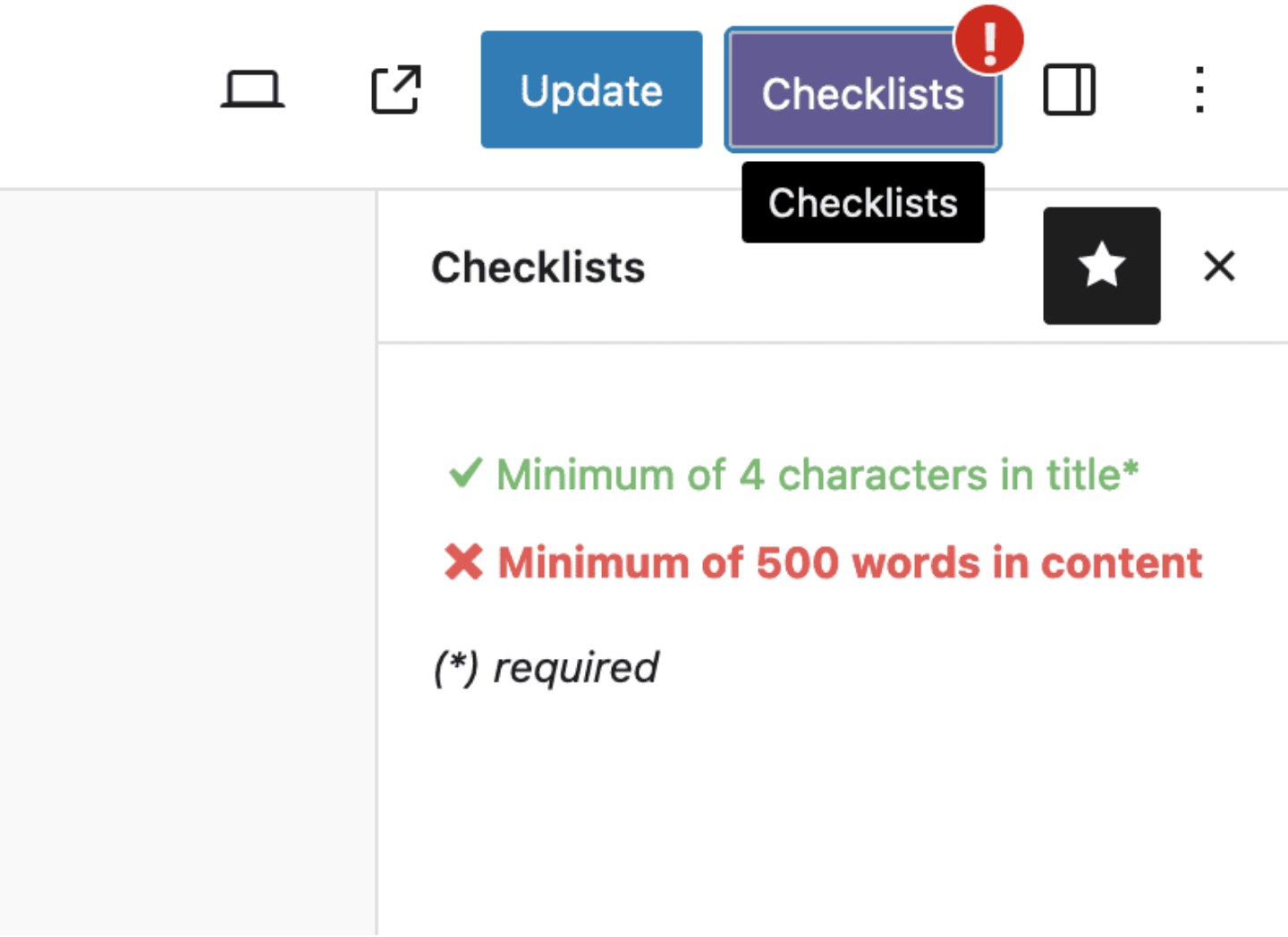
If you want, you can add more notifications for other groups. For example, you can notify "Authors of the content" when content is sent to the "Assigned" status.

Step #5. Publish With the Checklist

The PublishPress Checklists plugin allows you to set criteria that your writers should (or have to!) follow.

This add-on allows you to set a maximum and minimum value for categories, tags, and words. For example, you can now ask your users to write between 100 and 500 words or add between 3 and 5 tags.

Here’s how the Checklist appears in the WordPress writing area:



- Go to Checklists > Settings and you can create the requirements that you want people to complete before a post is published.

Step #6. Test

Now your workflow is complete. It's time to test to make sure everything works correctly:

- Have an "Editor" user create a post and assign an "Author" user as the content author. Do they get an email?
- Have the "Author" log in. Can they move the content to the "In Progress" or "Draft" and "Pending Review" status?
- Do "Editor" and "Administrator" users get an email when posts are moved to "Pending Review"?
- Do the Checklists work as you want?