ALES Wordpress Editor documentation

ALES Research websites

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ALES WEB TEAM CONTACTS

For support regarding your ALES website, please fill out an <u>ALES WEBSITE Request form</u> or <u>contact a</u> <u>member of the ALES Web Team</u>:

Genevieve Beaulieu gmb@ualberta.ca 587 414 1514

Brad Grier bradgrier@ualberta.ca 587 414 1516

Web Tips and Guidelines

Process to launch your website

- 1. URL / Domain name acquired and linked to the development website
- 2. (if required) Privacy blocks / passwords enabled to hide development content from Internet
- 3. Custom modules integrated (Woo Commerce, Monaris, Forms, custom downloads, Maps, etc)
- 4. Website Editor accounts created from list of CCIDs provided by client. Non-CCID editors are possible, but not recommended.
- 5. Previously agreed launch content posted and reviewed by client
- 6. Google Analytics (if required) set up and tested
- 7. Client sign off on templates and design of website
- 8. Client trained in Wordpress content management system by ALES web team
- 9. (if required) Additional training provided for custom modules

What we provide

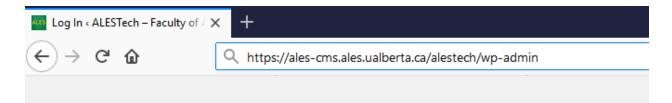
- Rotators, training, special modules, custom builds
- Shopping carts and storefronts, Forms, Maps and more
- Analytics account will automatically be created and reports sent to you
- Yoast (SEO tool) will be installed and activated
- News and Events tools are available additional training required
- Access to additional training videos for specific features are available
- Preset templates and <u>university approved colours</u> are offered*
- Content writing tips and guidelines

*other colours will be reviewed on a case-by-case basis

Usability Tips

- Limit global navigation items between 4 to 7 items
- Limit the number of child pages to an element between 5 and 9
- Prioritize content for mobile viewing (most important at top to least on bottom)
- Limit the number of images on a page
- Use horizontal images
- Resize images prior to uploading
- Come up with a naming convention for your images (simplify search of database)
- 1 idea per web page (to improve SEO)
- A rotator is good for a homepage however it is not an effective communication tool (initial image seen and subsequent images seldom seen)
- Use the default font and colour settings do not override with custom fonts. The U of A approved font *for websites* is installed on all wordpress sites
- Use built in headers as opposed to trying to adjust font sizes manually
- Rich text editor has subscript and other options built in use them!
- Consider your audience avoid acronyms and jargon
- U of A and/or ALES logo must be present on sites and positioning must follow U of A standards

Login



Navigate to: https://ales-cms.ales.ualberta.ca/*Your Site Here*/wp-admin/

```
or the URL of your website + "/wp-admin"
```

(http://examplesite.ualberta.ca/wp-admin)

Username or Email Address brad.grier	3*
Password Password Remember Me	Log In
Lost your password?	

Enter your Username and Password.

First.Last and your <u>ALES password</u>

(same one you use to log into your computer).

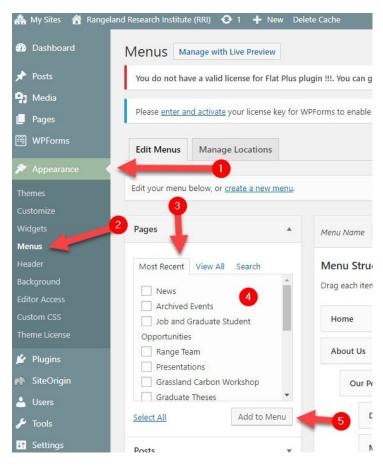
Website Dashboard

Tashboard < ALESTech - Faculty × +								
← → ♂ ŵ	🛈 🔒 https://ales-cms.ales.ualberta.ca/alestech/wp-adm	in/	🛡 🏠 🔍 Search	1	III\ 🗊 🗉	Ξ		
ሕ My Sites 🛛 🕆 ALESTech	Faculty of ALES Technical Res 🕇 New Delete Cache			Но	wdy, reguser 🖡			
🐼 Dashboard 🔸	Dashboard			Screen Options 🔻	Help 🔻			
Home My Sites	At a Glance	•	Quick Draft					
 Posts Media Pages 3 	 12 Pages WordPress 4.9.4 running ALES-Education-Hub_Child theme. Akismet blocks spam from getting to your blog. There's nothing in your spam queue at the moment. 		Title What's on your mind?					
🚢 Profile	Activity	A	Save Draft					
∧ MetaSlider			WordPress Events and News	s				
Collapse menu			Attend an upcoming event nea	ar you. 🤌				
2			Meeting in the Bunker R	Room at Saturday,	Mar 3, 2018			

- 1. Logout and User Profile use this area to exit the website editing system or to change your user password.
- 2. Main site commands
- 3. Pages this is where you choose to edit or add new pages
- 4. Media all images and documents (jpg, gif, pdf, word, etc) are stored in this area

Editing menu order or structure

- 1. Click on Appearance
- 2. Click on Menus
- 3. FInd the page in the list (pages)
- 4. Check the box and select the page



- 5. Click add to menu (it will show up at the bottom of the list on the right hand side (menu structure)
- 6. drag it to where you would like it to go
- 7. save menu
- 8. refresh your live site

<u>^</u>	Menu Name Main menu			0
All Search	Menu Structure Drag each item into the order you prefer. Click the	arrow on the right of the item to	o reveal additional configuration options.	
e Student	Home	Page 💌		
	About Us	Page 🔻		
n Workshop	Our People sub item	6 Page ▼	Once you've added the page drag it to where you would like it to go. Sub item will be indicated	
Add to Menu	Donors sub item	Page 🔻		
	Ecology and Management sub item	Page 🔻		
	Researchers sub item	Page 🔻		
	Strategic Advisory Council sub item	Page 🔻		
	Our Facilities sub item	Page 💌		
	Mattheis Research Ranch sub item	Page 🔻		

Add a new page

🔤 Dashboard « ALESTech - Faculty 🗙 🕂							
← → ♂ ŵ	③ ▲ https://ales-cms.ales	s.ualberta.ca/alestech/wp-a	idmin/	🚥 🔽 🏠 🔍 Search	III\ ⊡ ≡		
🚓 My Sites 🕆 ALESTech - Faculty of ALES Technical Res 🕂 New Delete Cache Howdy, reguser							
🚳 Dashboard 🛛 📢	Dashboard	Post Media			Screen Options 🔻 Help 🔻		
Home My Sites	At a Glance	Page		Quick Draft	*		
✤ Posts ೨ Media	12 Pages WordPress 4.9.4 running ALES-	Education-Hub_Child theme		Title What's on your mind?			

Move a page

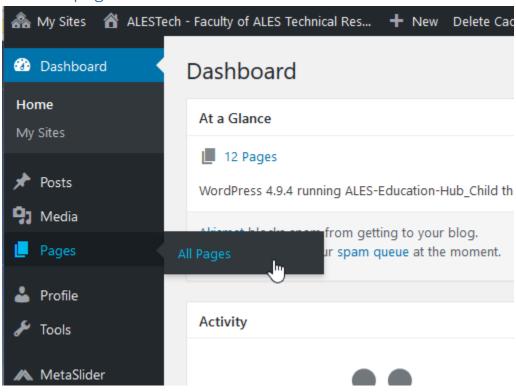
	Contact Us Rename View Unpublish Edit Template Move Delete
Pages	Move

Hover over the page to move. Click move. The page will now be highlighted with a yellow bar.

	Status	Modified	Template	
al Resources and Support	• Online 2018/01/16	2 hours ago	Default Template	Add New
Before II As a subpage tCaricelye Relete	• Online 2018/01/16		Default Template	
	 Online 2018/01/16 	1 hour ago	Default Template	Add New
/pdate / Change Request Form	• Online 2018/01/16	1 min ago	Default Template	Add New
	• Online 2018/01/16	<u>1 hour ago</u>	Default Template	Add New
this page (and its subpages) elsewhere Cancel	• Online 2018/01/16		Default Template	
	Status	Last Modified	Template	
	Jpdate / Change Request Form	2018/01/16 Conferencing Before I: As a subpage It Cancelve Celete Online 2018/01/16 Online 2018/01/16 Online 2018/01/16 Online 2018/01/16 Online 2018/01/16 Online 2018/01/16	cal Resources and Support • Online 2018/01/16 2 hours ago 2018/01/16 conferencing • Online 2018/01/16 2018/01/24 Before • Online 2018/01/16 1 hour ago 2018/01/16 Jpdate / Change Request Form • Online 2018/01/16 1 min ago 2018/01/16 • Online 2018/01/16 1 hour ago 2018/01/16 1 hour ago 2018/01/16 this page (and its subpages) elsewhere • Online 2018/01/16 3 hours ago 2018/01/16	cal Resources and Support • Online 2018/01/16 2 hours ago 2 hours ago 2018/01/16 Default Template © Conferencing Before • Online 2018/01/16 2018/01/24 Default Template • Online 2018/01/16 1 hour ago 2018/01/16 Default Template • Online 2018/01/16 1 min ago 2018/01/16 Default Template • Online 2018/01/16 1 min ago 2018/01/16 Default Template • Online 2018/01/16 1 hour ago 2018/01/16 Default Template • Online 2018/01/16 1 hour ago 2018/01/16 Default Template • Online 2018/01/16 3 hours ago 2018/01/16 Default Template

Move your mouse pointer to the destination location for the new page. Click the appropriate button to insert the page after the destination page, before the destination page, or make it a subpage of the destination page.

NOTE: This does not add the page to the menu or navigation structure. Altering this page arrangement is only for your ease of use within the editing tools.



Select a page to edit

Dashboard	Pages					
Posts	All (12)	Online (12) Offline (0) Recent Pages				Search Page
] Media	Bulk Actio	ons 💌 Unselect All Fold All				0 Selected Iten
. Pages		Pages	Status	Last Modified	Template	
II Pages Profile		ALES Technical Resources and Support	• Online 2018/01/16	1 hour ago	Default Template	Add New
Tools		Video & Web Conferencing	• Online 2018/01/16	2018/01/24	Default Template	Add New
 MetaSlider Collapse menu 		Websites	• Online 2018/01/16	48 mins ago	Default Template	Add New
Conapse menu		Tutorials	• Online 2018/01/16	48 mins ago	Default Template	Add New
		Contact Us	• Online 2018/01/16	2 hours ago	Default Template	Add New
		Pages	Status	Last Modified	Template	

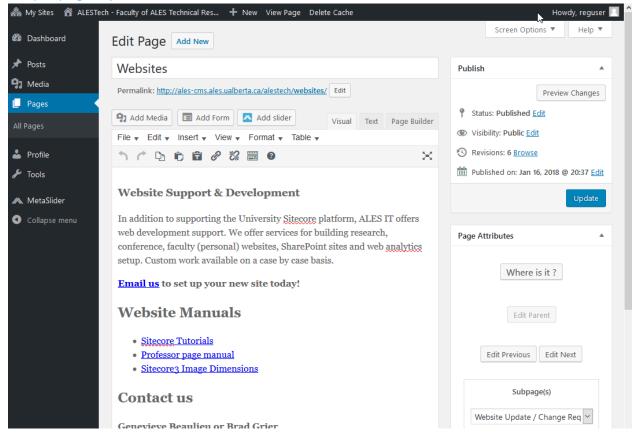
Hover over the page name and then click Edit when it appears.

		Contact Us Rename View Unpublish Edit Template Move Delete	• Online 2018/01/16	2 hours ago	Default Template	Add New
	Pages	Edit	Status	Last Modified	Template	

Edit a page

Depending how the page is set up, you will see one of two views.

Simple page layout



This edit interface is the common one used to edit both Simple and Modular pages.

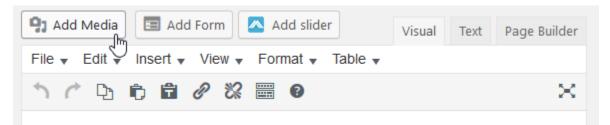
Editor Interface, Uploading and linking to Images and Documents

Add images and documents

Images

Uploading an image or document.

In the edit interface, move the cursor where you'd like the image to appear. Click the Add Media button.

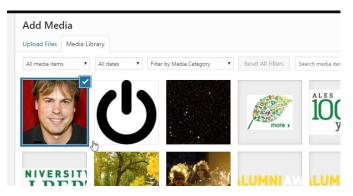


From the Add Media popup window, either drag-and-drop (from your desktop) the image/document or press the 'Select File' button and choose the image/document from your computer. The file will be uploaded to the Media Library.

Add Media	Add Media	×
Create Gallery	Upload Files Media Library	
Create Audio Playlist		
Create Video Playlist		
Featured Image		
All		
Insert from URL		
e.		
~		
0	Drop files anywhere to upload	
	no	
	Select Files	
	Maximum upload file size: 6 MB.	

Inserting an image

Once uploaded, the image will be preselected. It'll have a blue checkmark in the upper right corner.

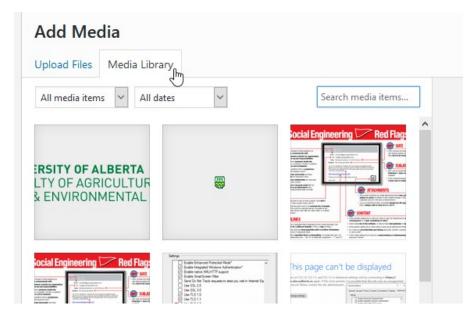


Press the blue 'Insert into page' button in the lower right to insert the image into the content.

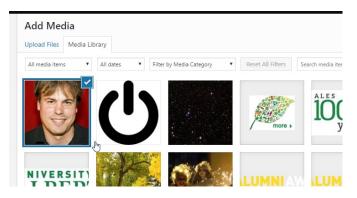
If you have an image already in the Media Library, press the Add Media button.



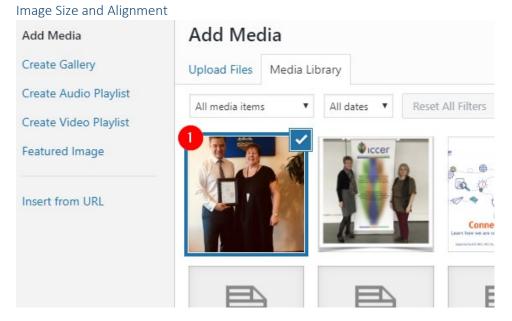
Select the Media Library tab (if it's not already selected). Then either scroll to your item or use the 'Search media items...' box to filter the presented options.



Once selected the image will have a blue checkmark in the upper right corner.



Press the blue 'Insert into page' button in the lower right to insert the image into the content.



Select the image.

or 01	Characteristics_of_car egivers_2010Dec_fina I-1.pdf	Required fields are marked * Media Categories
		No Media Categories found.
Ja	CareNetworksfactshe et06May23FINAL- 1.pdf	ATTACHMENT DISPLAY SETTINGS
		Link To None Siza Thumbnail – 150 × 150
		4 Insert into page

At the far right lower corner, select the image alignment.

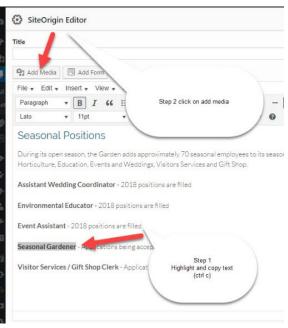
- (2) Left will put the image on the left side and text will wrap on the right.
- (3) Size will let you select from a few standard sizes.
- (4) Insert into page.

Documents

This description assumes the document has already been uploaded to the Media Library. See the first part of the Images section (above) to review the uploading instructions.

To link text to a PDF or Word doc:

- 1) Select the text that you want to be the link. Then copy the text (Ctrl+C)
- 2) Click the 'Add Media Button'



3) Select the Media Library tab (if it's not already selected). Then either scroll to your item or use the 'Search media items...' box to filter the presented options.

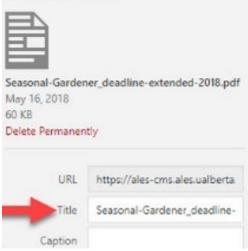
Add Media		
Upload Files Media Libra	ary Im	
All media items 🗸 All da	ates 🗸	Search media items
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4) Click on the document. This will select it and put a blue box/check mark in the upper right corner of the selected document.



5) Then, go immediately to the 'Title' box in the attachment details section on the right.

ATTACHMENT DETAILS



Paste in the text you copied to your clipboard from step 1 above.

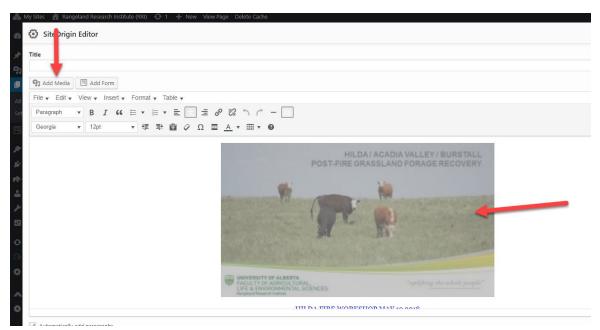
6) Then Press the blue 'Insert into page' button to complete linking your document to this content.



Linking Images to Documents

To have an image be a hyperlink that opens a related document.

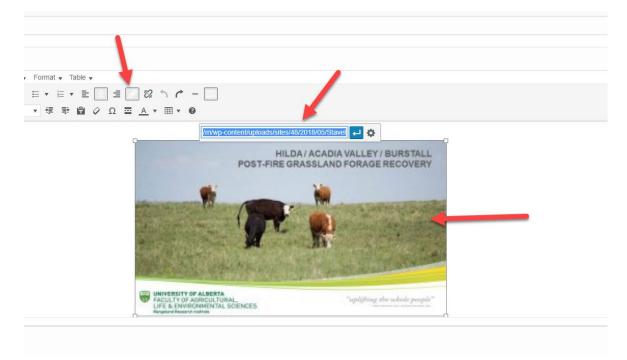
In the editor, click on the picture and click on add media, select the document.



Once you have selected the document, copy the URL (only keep from the /***your site name here***/wp-content/uploads/sites/48/2018/05/Stavely-Soil-Health-Field-Day.pdf) and exit this screen go back to your picture and click on it.

Ipload Files Media L		et All Filters Search r	nedia items							1
	All dates • Prese	Onefour-Soil- Health-Field- Daypdf	Oyen-Range-Field- Day-2018.pdf	Soil Health Field Day		Range Field Day Range Field Day and the second se	SRM_Summer_Tour_ _agenda_May18_201 8,pdf		May 342 1	ely-Soli Health-Field-Day.pdf 18, 201
				141 perce applicant	14 Personal Participation	A reason between the		Woodd war an an igned of it sees a period to be	Title	Stavely Soil Health Field Day
		B				C_Workshop		B	Caption	

Then go back to the image on the page. Click on it. Click on the link option and a pop up will show up and paste the path into the field of the pop up and click the little arrow to apply it.



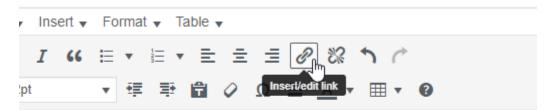
Linking to an Internal Page

To link text to another page on your website, you first highlight the text that will be the link.

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	Here's to the crazy ones. The <u>misfits</u> , the rebels. <u>differently</u> . They're not fond of rules. You can qu

we see genius. Because the ones who are crazy eno

Then click the **Insert Link** button to open up the **Add Link interface**.





Here's to the crazy ones. The <u>misfits</u>, the rebels. I differently. They're not fond of rules. You can que do is ignore them. Because they change things. The we see genius. Because the ones who are crazy en

Click on the Gear icon. This will open up the Link Options interface.

∉ ₱ 🛱 🖉 Ω ≡ <u>∧</u> ▼ ⊞ ▼ 🥹



Here's to the crazy ones. The <u>misfits</u>, the rebels. The <u>troublemake</u> differently. They're not fond of rules. You can quote them, <u>disagr</u> do is ignore them. <u>Because they change things</u>. They push the hu: we set Paste URL or type to search

Insert/edit link		×	1
Enter the destination URL			es.
URL			4bo
Link Text Because they change things			iay e o
2 🗌 Open link in a new tab			
Or link to existing content			
Search			
Search or use up and down arrow keys to select an item.		•	
Test	ENTRY		
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How to use the WP Knowledgebase	KNOWLEDGEBASE		
Updating WordPress	KNOWLEDGEBASE		
Using the Power Button	KNOWLEDGEBASE		
Testing	PAGE		
An Annalis - Frank	ELIEL E	•	
Cancel	5 Add Lin	k	

- 1. This is the text that will be the link
- 2. Check this if you want the link to open in a new browser tab
- 3. If you have many pages and the page you're looking for is not displayed, type the title of the page or some text that appears within the page; the results will automatically be filtered to match what is typed.
- 4. The pages that match your search criteria (3). All pages if the search box is blank.
- 5. Press this to create the link.

Visual editor vs HTML editor

Visual	Text	Page Builder

Visual is a What You See is What You Get editor (similar to Word or other online content editors). Text is a raw HTML text editor.

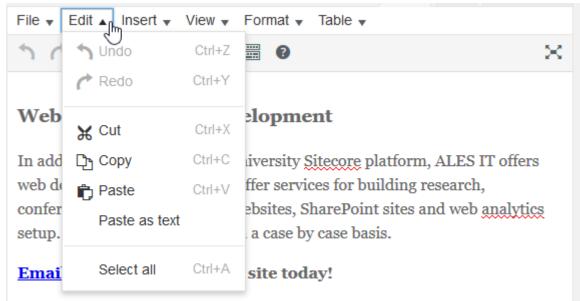
Modular page layout	
Visual Tex: Page Builder	 Status: Publi Visibility: Pul
×	Published or
	Hide Title?
	Hide the title

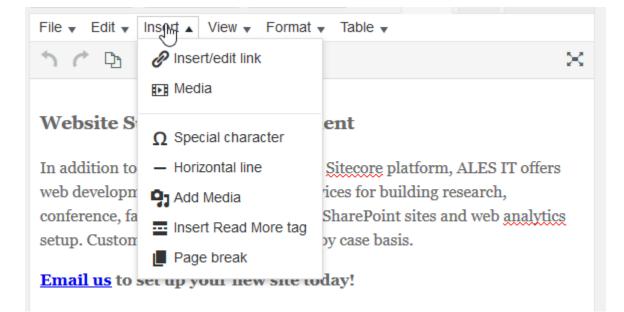
On a new page (or a page that is not currently using the Modular page layout) select the Page Builder tab in the upper right.

🚳 Dashboard	Edit Page Add New	Screen Options ▼ Help ▼
🖈 Posts	Contact Us	Publish 🔺
 9) Media Pages 	Permalink: http://ales-cms.ales.ualberta.ca/alestech/contact-us/	Preview Changes
All Pages	Add Widget = Add Row I Layouts Add History C Live Editor Revert to Editor	 Status: Published <u>Edit</u> Visibility: Public <u>Edit</u>
📥 Profile 🎤 Tools	SiteOrigin Editor	 Revisions: 30 <u>Browse</u> Published on: Jan 16, 2018 @ 20:37 <u>Edit</u>
٨ MetaSlider	We are here to help General Hours Unless specified [below], all IT support staff hours are:	Update
 Collapse menu 	Custom HTML Custom HTML Custom HTML Custom HTML System Analysts	Page Attributes
	×:	Where is it ?
	Custom HTML Custom HTML Custom HTML Custom HTML AFNS & REES HE & RenR Initial Faculty Initial University of	Edit Parent
	Word count: 222 Last edited by bgrier1 on February 21, 2018 at 8:22 pm	Edit Previous Edit Next

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Editor Menus

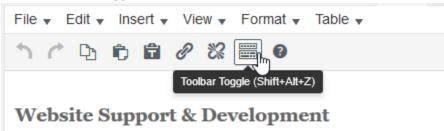




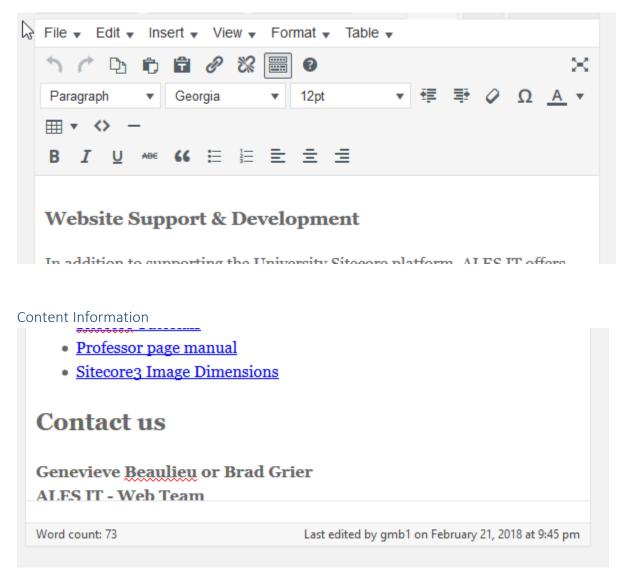
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Email us to set up your nev		
Website Manuals	Clear formatting	

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Website Support & Developme	Delete table	
In addition to supporting the University \S	Cell	IT offers
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Editor Toolbar Toggle



Shows or hides additional features of the editor.



At the bottom of the edit window. Displays last edit detail and current word count.

Screen Options
Howdy, reguser

At the top of the edit window is a tab labeled Screen Options. Clicking it reveals a dropdown that allows you to add or remove various edit components in the Edit Window.

LESTech	- Faculty of ALES Technical Res 🕂 New View Page Delete Cache		Howdy, reguser 📃 🥤
	Boxes Page Attributes Append Ninja Form Featured Image Revisions Custom F Page Builder Theme Settings Layout 1 column © 2 columns Additional settings Enable full-height editor and distraction-free functionality.	Fields 🗌 Slug 🗌 Author	
	Edit Page Add New	Screen Options	•
	Websites	Publish	*
	Permalink: http://ales-cms.ales.ualberta.ca/alestech/websites/ Edit	Pr	eview Changes

Content Versions or Revisions

Boxes	
모 Page Attributes 🗹 Append a Ninja Form 🗹 Featured Image 🏹 Revisions 🗆 Custom Fields [Slug 🗌 Author
☑ Page Builder ☑ Theme Settings	
Layout	
○ 1 column	
Additional settings	
☑ Enable full-height editor and distraction-free functionality.	
	Screen Options 🔺

In the screen options, check the Revisions checkbox to enable viewing revisions. Here you can review previous versions of this content and, if necessary, revert back to a previous version.

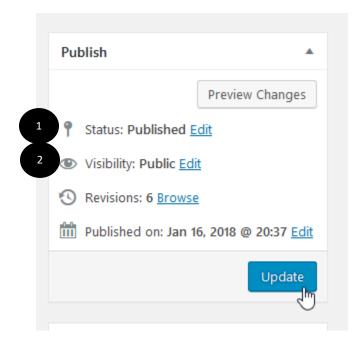
Revisions	
gmb1, 4 hours ago (February 21, 2018 @ 18:26:07)	
gmb1, 5 hours ago (<u>February 21, 2018 @ 18:12:36</u>)	
gmb1, 5 hours ago (<u>February 21, 2018 @ 18:09:34</u>)	
Dgrier1, 4 weeks ago (<u>January 24, 2018 @ 20:56:34</u>)	
Dgrier1, 4 weeks ago (January 24, 2018 @ 20:55:31)	
Dgrier1, 4 weeks ago (January 24, 2018 @ 20:53:52) [Autosave]	

Compare Revisions of " <u>Websites</u> "		Help 🔻
	Comp.	are any two revisions
Previous	•	Next
Revision by gmb1 5 hours ago (21 Feb @ 18:09)	Rest	ore This Revision
Title		
Websites	Websites	
Content		
<div></div>	<div></div>	
<h3>Website Support & Development</h3>	<h3>Website Support & Developme</h3>	nt
<div></div>	<div></div>	
In addition to supporting the University Sitecore platform, ALES IT offers web development support. We offer services for building research, conference, faculty (personal) websites, SharePoint sites and web analytics setup. Custom work available on a case by case basis.	In addition to supporting the Un Sitecore platform, ALES IT offers w development support. We offer servi building research, conference, facu (personal) websites, SharePoint sit analytics setup. Custom work availa case by case basis.	eb ces for lty es and web
Having a site built is a simple process that requires very little time on your part.		
The steps involved are:		
		
A brief meeting to choose site template		



Once you've completed reviewing versions, the Return to editor link in the upper left corner will take you back to your content.

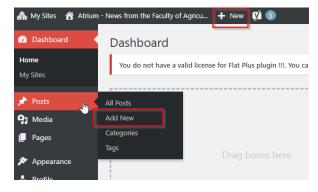
Publishing your content



- 1. Content can be in one of three states:
 - a. Published this content is public and on the Internet
 - b. Draft this content is not yet published
 - c. Pending Review this content is final content, but a website Author, Editor, or Administrator has to review it yet. They have the ability to publish this content.
- 2. You can also hide final or Published content by editing the visibility of the content.

Create and Edit a Post

To create or edit an item to appear within a content block or blog post, select ADD NEW from either the left-hand menu or the + at the top of the page. The New Post edit window will appear. It's very similar to the Page Edit window described previously.



Add New Post		Screen Options 🔻 Help 🔻
You do not have a valid license for Flat Plus plugin !!!. You can get the license code from your put	chase history on <u>themeisle.com</u> and validate i	t <u>here</u> <u>Hide Notice</u>
This post type is set to use the Classic Editor by default for new posts. If you'd like to change this to new posts	the block editor, please go to <u>Page Builder Sett</u>	ings and uncheck Use Classic Editor for
Enter title here	Р	ublish 🔺
3 9 Add Media File ▼ Edit ▼ View ▼ Insert ▼ Format ▼ Tools ▼ Table ▼ Paragraph ▼ B I 46 ☱ ▼ ☱ ▼ ☱ Ξ Ξ 2 2 2 1 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Visual Text Page Builder	Save Draft Preview
Word count: 0		All Categories Most Used All Categories Most Used Advancement AFNS ALES IT ALES News ALES Strategic Plan Awards & Accolades Blades' Bulletin Compruspications
		Communications
Yoast SEO	±	Add New Category 5

- 1. Enter the title of your item here. In some cases, this will appear in a 'roll-up' module on the Home Page / Landing Page. The post URL (permalink) will be automatically generated from the text entered in this title field.
- 2. This is the main edit area. It functions identically to the Page Edit area described previously.
- 3. Add images to your main article area. Images are inserted at the cursor point. This functions identically to the Page Edit area described previously.
- 4. **Categories are important.** On some websites, categories are used to filter which posts are to appear within specific content blocks.
- 5. Add new category types here.

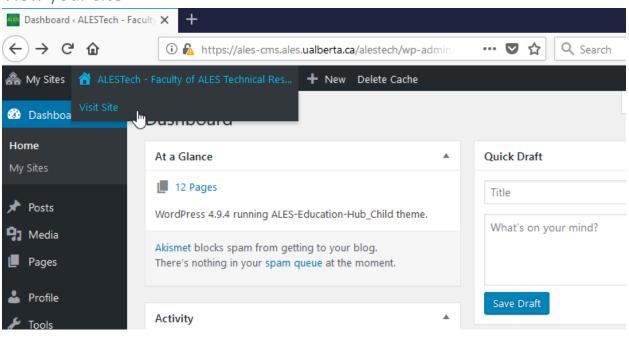
- Add a Feature Image here. These are required for images to appear anywhere content is aggregated or rolled-up to be displayed. This includes teaser images for the home page or post excerpts on rollup-pages.
- Excerpt (REQUIRED) This is a text only field. Bold, Italics, Underscore, Hyperlinks are not allowed here. This is a short 'teaser' text that will appear in content blocks next to the Feature Image (teaser image).
- 8. Set the article author here. It's not currently displayed on many sites.

Communications + Add New Category	*
Tags	
Add	
Separate tags with commas	
Choose from the most used tags	
Featured Image 6	
Set featured image	

	·
Excerpt 7	
Excerpts are optional hand-crafted summaries of your content that can be used in your theme. <u>Learn more about manual excerpts</u> .	/i
Author 8	•
reguser (reguser)	

Publish	
Save Draft	Preview
9 Status: Draft <u>Edit</u>	
Visibility: Public Edit	9
Publish immediately Edit	
(V) Readability: Needs improv	rement
[√] SEO: Not available	
	Publish

9. Save / Publish. Save your draft (without publishing) or schedule your item for publishing. Or publish now.



View your site