

# VolunteerMatters Wordpress Web Platform Content Admin Guide

Version 1.1

## VolunteerMatters Wordpress Web: Admin Guide

This VolunteerMatters Wordpress Web Platform administrative guide is broken up into four main areas:

- I. Website (Pages, Posts, Files, etc)
- II. eStore (In a coming document)
- III. Calendar (In a coming document)
- IV. Volunteer Portal (subscription based - In a coming document)

Administrative accounts for the VolunteerMatters Wordpress Web Platform are defined within your VolunteerMatters contact database

(<https://www.volunteermatters.net/vm>) in a built-in custom field called "Website Roles". There are 5 different types of administrative accounts built in to administer to the VolunteerMatters Wordpress Web Platform that you can assign to contacts in the VolunteerMatters database:




- site\_administrator
- site\_calendar\_manager
- site\_content\_manager
- site\_shopping\_manager
- site\_document\_manager

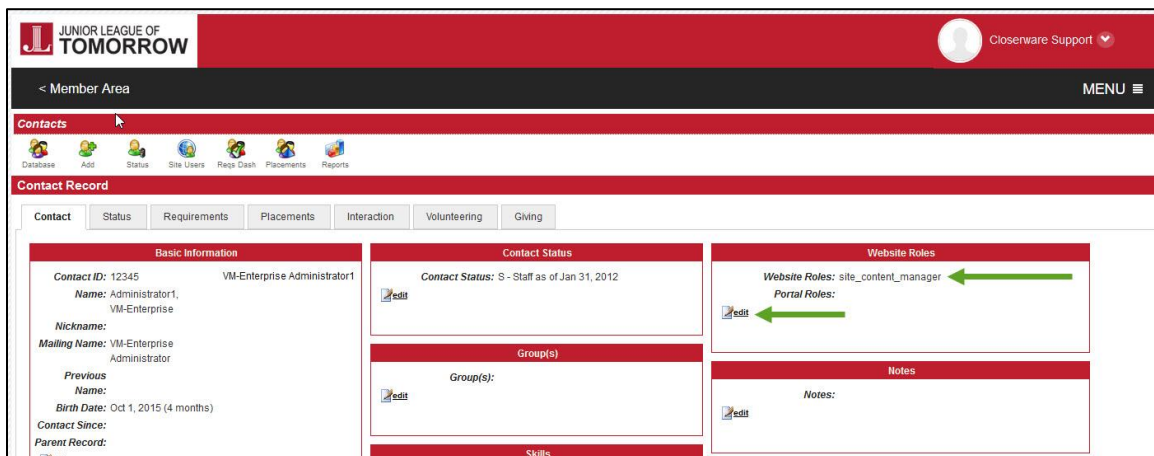
### Admin Guide Table of Contents

<b>Website</b>
Pages Dynamic Posts Page Content Documents Management and Media Library

The built-in roles are specifically for the administration of the following areas of the VolunteerMatters' Wordpress Web Platform:

1. **site\_administrator** - Full site administrative access.
2. **site\_calendar\_manager** - Can administer the calendar. This includes creating/editing/deleting events as well as event permissions.
3. **site\_content\_manager** - Can edit any existing page content (including available homepage elements) as well as add/edit/delete any dynamic custom port types.
4. **site\_shopping\_manager** - Can administer the online store. This includes creating/editing/deleting product categories, items, coupons, etc. as well as item permissions and managing orders.
5. **site\_document\_manager** - Has control of the Document Management section in the backend.

To assign these roles to a member you will log into your VolunteerMatters administrative system (<https://www.volunteermatters.net/vm>) and select the "Admin" link from the dropdown and then click on the "Database" icon () to get to your contact database list (<https://www.volunteermatters.net/vm/member/ContactList.do>) and then navigate to the contact record you wish to add a role to and click on the "View Record Detail" icon () . Then you will click the "Edit" button/link () to edit the "Website Roles" custom field.



The screenshot displays the 'Contact Record' page for a contact named 'VM-Enterprise Administrator1'. The page is divided into several sections: 'Basic Information', 'Contact Status', 'Website Roles', 'Group(s)', and 'Notes'. The 'Website Roles' section is highlighted with a green arrow pointing to the 'site\_content\_manager' role. The 'Basic Information' section shows contact details such as ID, name, nickname, mailing name, previous name, birth date, contact since, and parent record.

There you can select the "role" that the contact is supposed to have within your VolunteerMatters Wordpress Web Platform and the next time they log into the Website they will have those administrative abilities.

# Website

## Wordpress Basic Principles

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### Pages vs Posts

Often WordPress beginners get confused between posts and pages. By default, WordPress comes with two content types, posts and pages. As a beginner, you are probably wondering what the difference between them is.

**Pages** are static and are created/edited/removed by Closerware Support. The page content on a page can always be edited by an organization's administrator but the actual creation of pages requires assistance. A "Contact Us" page is the classic example.

During the setup stage of your website, your organization provided Closerware Support with the desired page hierarchy/menu for your website. Changes to this site hierarchy can be requested but is limited to minor change requests here and there. i.e.: 1 or 2 page changes.

A major reconstruction of your existing site hierarchy is not covered by your annual subscription fee. We can offer one of two options:

1) We can document the requirements and provide a proposal to do the work for you.

or

2) We can give your organization access to additional administrative tools to do the work yourself or by another vendor.

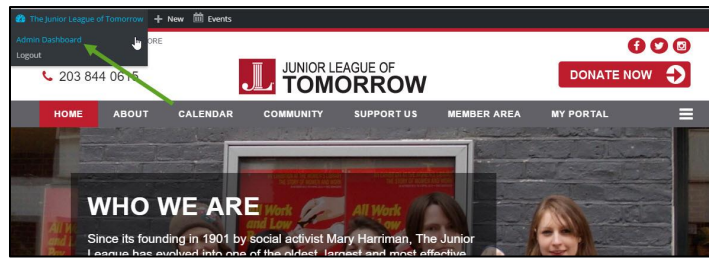
*Please keep in mind, that if your organization selects the second option, then you will be assuming all responsibility for the work performed and any resulting issues (if any). And any updates to the system required by Closerware Support due to option two would require hourly charges.*

A **Post** is what makes up the majority of your site's dynamic content. Think of the posts as the news portion of your site. They're dynamic and constantly changing the content your end users sees.

Within the Closerware Wordpress Web Platform there are a number of custom dynamic post types. They are as follows:

- Advocacy Issues
- Grants
- Press Releases
- News Articles
- Projects
- Fundraisers
- Sponsors
- Sponsorship Opportunities
- League Announcements

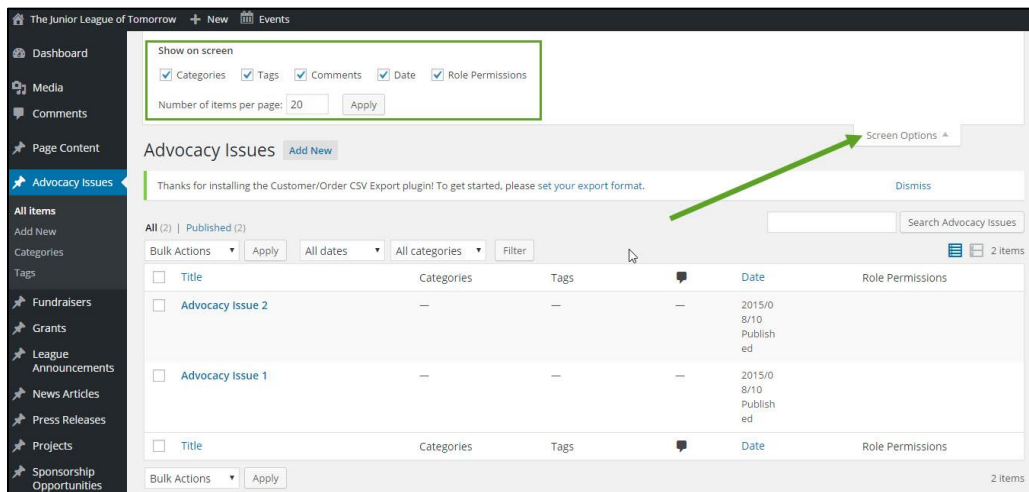
Two other elements that are similar but not exactly custom post types are eStore items and Calendar events. You will be able to edit all existing page content, fundraisers, projects, events, products, etc. via the Admin Dashboard link.



Not all post types are configured to be displayed on all sites. Please contact support if you have any questions.

## Screen Options

When you are on the Admin Dashboard editing any of your page content or dynamic posts you can always configure what elements are displayed on the page via the "Screen Options" at the top right of the screen.



It can be used to show/hide dashboard modules on some screens and show/hide columns on other screens. When you click on **Screen Options**, it will drop down an area with a list of the different things in the dashboard you can show or hide. Uncheck a box to hide something and check it again to show it. You can also change the number of columns for the modules. Most screens that have configurable modules have an option for one or two columns. Some pages will automatically show the number of the columns that fit within your browser.

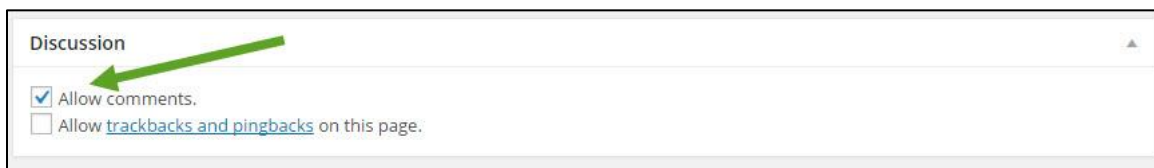
After you are done making changes, click Screen Options again and the pull down area will disappear from the view.

### **Saving Screen Options**

You don't have to worry about saving any of your Screen Options. WordPress saves your configuration automatically for you in a cookie on your computer and in the database so that when you use another browser or a different computer, everything will look the same.

### **Comments**

Comments are a way for visitors to add feedback to your posts and pages. If you choose to enable comments for your posts, then a comment form will appear at the bottom of the posts and people can respond to what you have written. By default comments can only be seen on News Articles, League Announcements, Events, and eStore Items. Comments on these elements are disabled by default; you must check the "Allow Comments" box on these elements to enable.

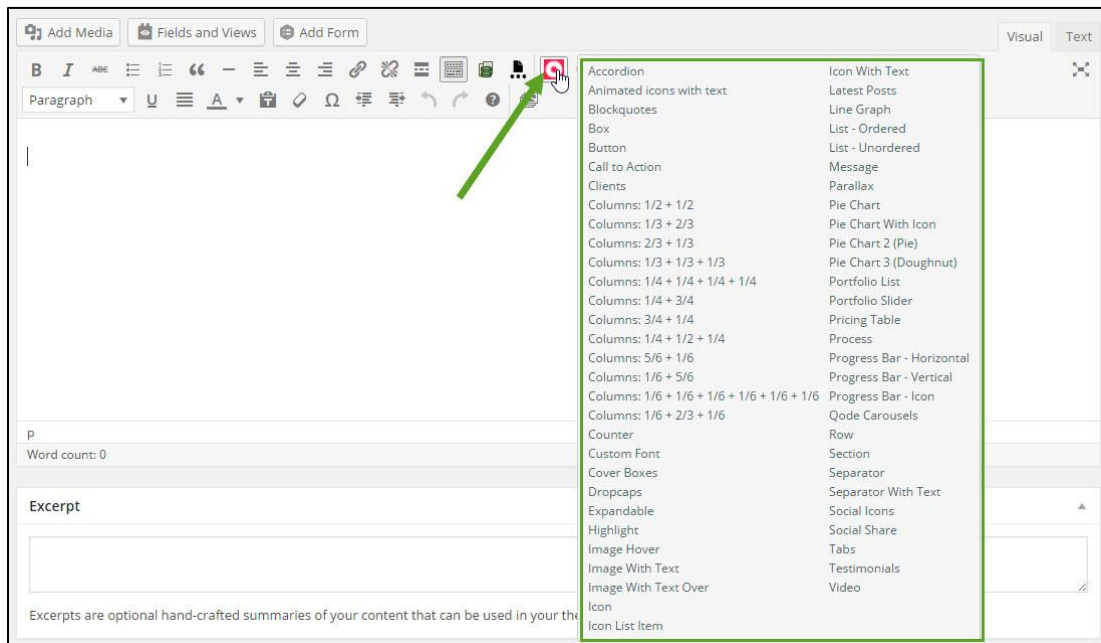


### **Shortcodes**

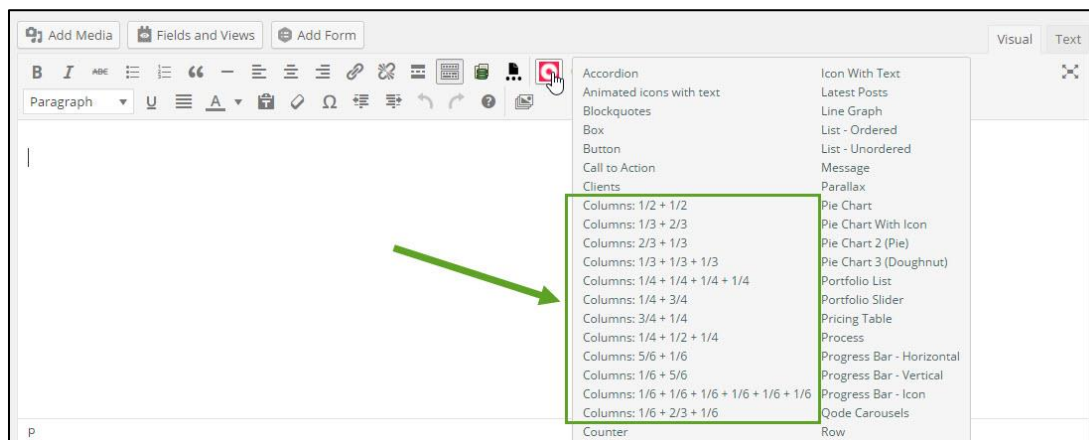
A shortcode is a WordPress-specific code that lets you do nifty things with very little effort. Shortcodes can embed files or create objects that would normally require lots of complicated, ugly code in just one line. For the most part the only shortcodes you will use on the website are those with Document Management and those described in the next principle.

## HTML Editor – Qode Options

This button is available on the HTML Editor when you adding or editing page content or a post which provides a list of available short codes commands to enter in the content.



For some elements it will enter the shortcode directly into the content for you to work with but others a wizard will open to configure the elements for the shortcode. One of the more common shortcodes you will use on the site is "Columns".

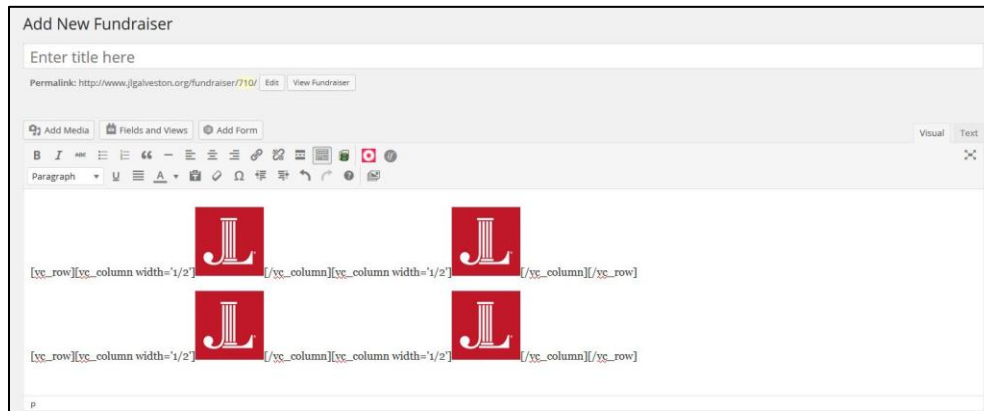


Because the site is responsive you do not want to use tables which are non-responsive elements. In their place we use columns. If you wanted to split the content into 2 columns you would select "Columns: 1/2 + 1/2" and if you wanted 4 columns you could select "Columns: 1/4 + 1/4 + 1/4 + 1/4", and so on. After you click on it, the shortcode will be entered into the editor. For example if I selected the 2 columns the short code is:



```
[vc_row][vc_column width='1/2'][/vc_column][vc_column width='1/2'][/vc_column][vc_row]
```

Each column starts with `[vc_column width='1/2']` and ends with `[/vc_column]`, so you would just put that content in between those for each column (for images make sure you select "No Alignment"). And you then add the content in the next column. And if you need to add another row you can just click on the Qodes Shortcodes button again. This makes all the content elements stack on each other and make the site truly responsive. The following image shows what the html editor content would look like with 2 columns and 2 rows.



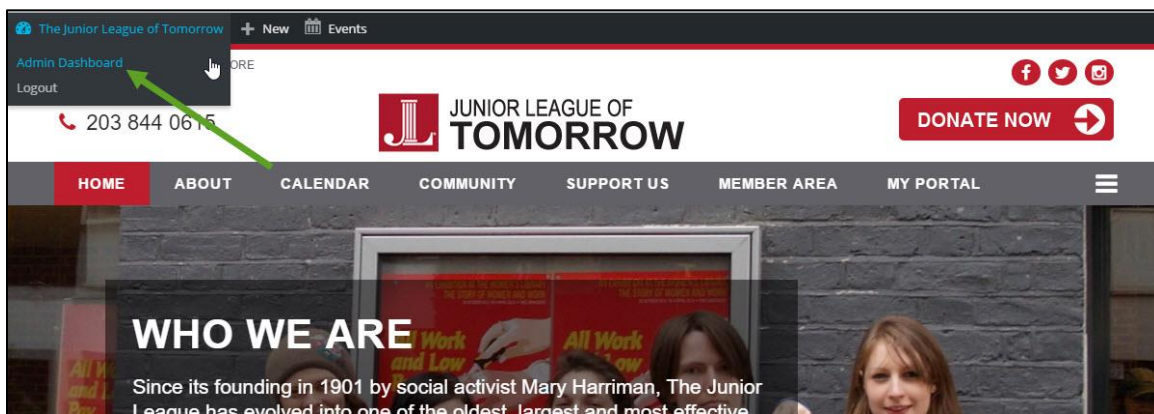


## Page Content

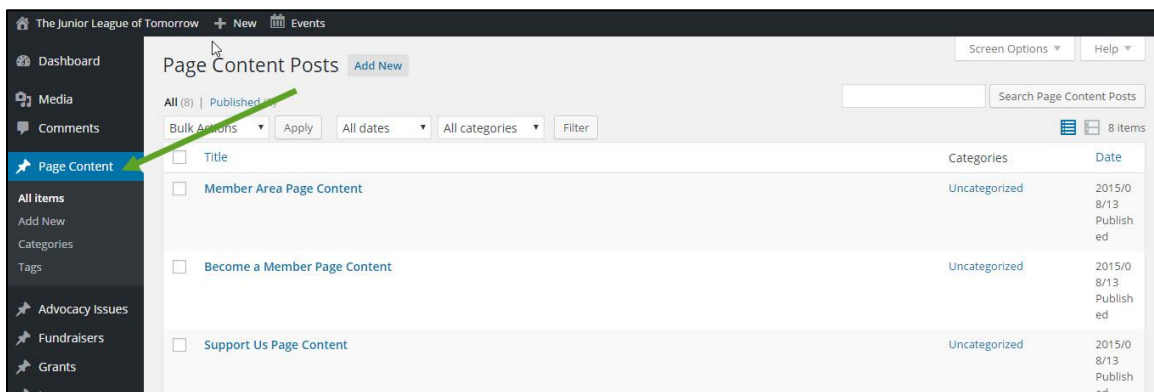
Most pages have a content area on them where an organization administrator can edit and publish updated content. Some pages can have multiple page content elements (for example the homepage might have multiple elements). The number of elements on the page may increase depending on your website theme.

To edit content on an existing page within your Website, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen. Click on the "Admin Dashboard" link to enter the administrative area of the website.



Then click on the "Page Content" link on the left hand side menu.

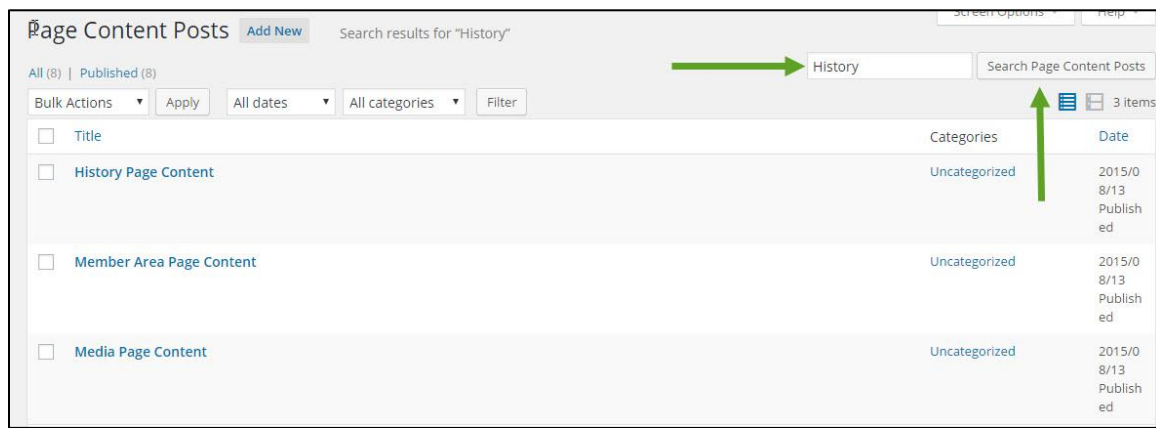


The Page Content elements are named (by default) based upon a convention of where the content is on the page and the page's location in the site hierarchy. For example, with the "Contact Us" page if the page is under the "About Us" primary navigation, the

default label on the Page Content element would be "About Us – Contact Us" or "About Us > Contact Us" or something similar.

The initial page content display order is by date created (descending). You can also change that when you are on the page to sort by "Title", Categories (if utilized), Date, etc.

You can also search for keywords in your posts. For example, if your website has a lot of pages and you are looking for the "History" page, you could enter History in the Search field and click "Search Page Content Posts" or "Enter" on your keyboard.



This will return all Page Content posts that feature that keyword whether in the title or content.

Once you locate the Page Content you wish to edit, you will hover your cursor over the element and additional elements will be displayed for each Page Content:

[Edit](#) | [Quick Edit](#) | [Trash](#) | [View](#) | [Duplicate Page Content Post](#)



**Edit** - This Action can be either an "Immediate Action" or a "Bulk Action". The Immediate Action, initiated by click on the Post Title or clicking on the Edit option just below the Post Title, causes the Edit Posts screen to display. Edit is also available as a Bulk Action for the selected Posts (see following selection for Bulk Actions)

**Quick Edit** - Quick Edit is an Immediate Action performed on one Post by clicking the Quick Edit link, under the Post Title in the Table of Posts. Quick Edit is just an in-line edit that allows you to change the following items--Title, Slug, Date, Author, Password or Private post box, Categories, Tags, Allow Comments, Allow Pings, Status, etc.. For the most part you will not utilize this.

**Delete** - This Action deletes the Posts. Delete is available both as a Bulk Action, and an Immediate Action. Note: You cannot delete locked posts.

**View** - This Action presents the Post as it appears in a single Post view on your blog. View is available only as an Immediate Action.

**Duplicate Page Content Post** - This action will create an exact duplicate of the whatever post type you are on. This should NOT be used with Page Content elements.

Once you click Edit you will be taken to the "Edit Posts" screen.

Depending on what you have removed via the Screen Options, the typical elements needed for Page Content posts are the following:

**1. Title/Headline Box**

This is the title of your page content. We would recommend not editing this for Page Content. This derived based on the page name and site hierarchy.

**2. Permalink**

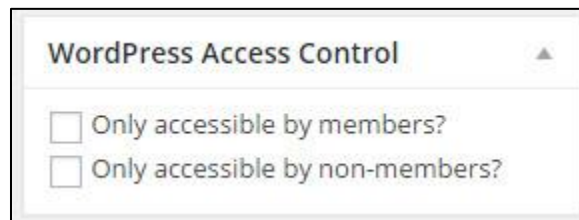
Permalink stands for "permanent link". For Page Content this is the URL of the Page Content, NOT the page the content is displayed on. This can be ignored.

**3. Body Copy Box**

The blank box where you enter your writing, links, links to images, and any information you want to display on your site. When writing your post, you have the option of using the Visual or Text mode of the editor. The visual mode lets you see your post as is, while the Text mode shows you the code and replaces the WYSIWYG editor buttons with quicktags buttons.

**4. Wordpress Access Control**

This element determines If the post is Member only or Public. If it is a member only element, you will check "Only accessible by members?" otherwise by default it is a publicly available post.



**5. Publish box**

There are 3 main elements in this box: Status, Visibility, and Published.

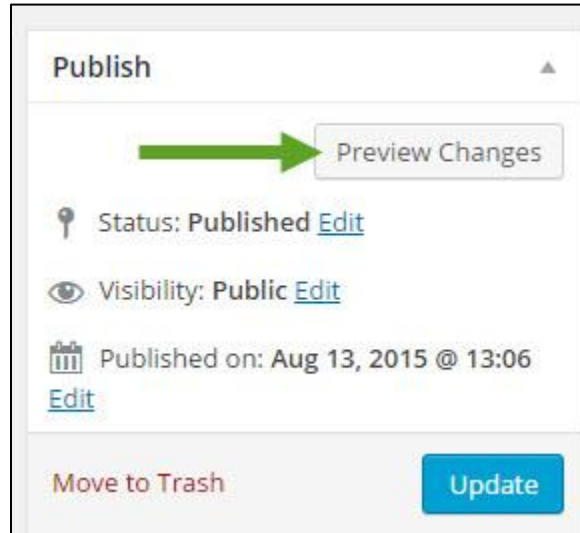
Status can be "Published", "Pending Review", or "Draft". For Page Content, this should remain as "Published" or else it will not be displayed on the webpage.

Visibility - This determines how your post appears to the world. Public posts will be visible by all website visitors once published. Password Protected posts are published to all, but visitors must know the password to view the post content. Private posts are visible only to you (and to other editors or admins within your site)

Published will show the date/time the page content was created (this also determines the order of the page content in the page content list).

For the most part you will only click the "Update" button in this box to update your content.

I would also recommend the "Preview Changes" button before clicking the "Update" button.



This opens up a new browser window of the post to allow you to review the content changes before committing them. When previewing Page Content posts it will open up the actual post NOT the page the element is displayed on.

## 6. Categories

The general topic the post can be classified in. This is typically not used but if desired you can categorize your Page Content posts for more filtering options.

## 7. Tags

These are used with Page Content posts to determine which pages display which page content posts. Do not edit or remove these tags.

So once you make your necessary edits, you can click the "Update" button and your changes will be committed and display on the page in question where the Page Content post is display.

For more information on Adding Images and File Downloads to your content click [here](#).

## Custom Dynamic Post Types

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As stated previously, within the Closerware Wordpress Web Platform there are a number of custom dynamic post types. They are as follows:

Advocacy Issues  
Grants  
Press Releases  
News Articles  
Projects  
Fundraisers  
Sponsors  
Sponsorship Opportunities  
League Announcements

This section will go over adding a new custom post type, editing an existing custom post type, and deleting an existing custom post type. Many of the custom post types are very similar and we will simply go over those that are different.

The following custom post types are similar in their content editing, display order on the website, etc.:

- Advocacy Issues
- Grants
- Projects
- Fundraisers
- Sponsorship Opportunities

Then there are the following similar custom post types:

- Press Releases
- News Articles
- League Announcements (Member Area Posts)

And finally there is a unique custom post type:

- Sponsors



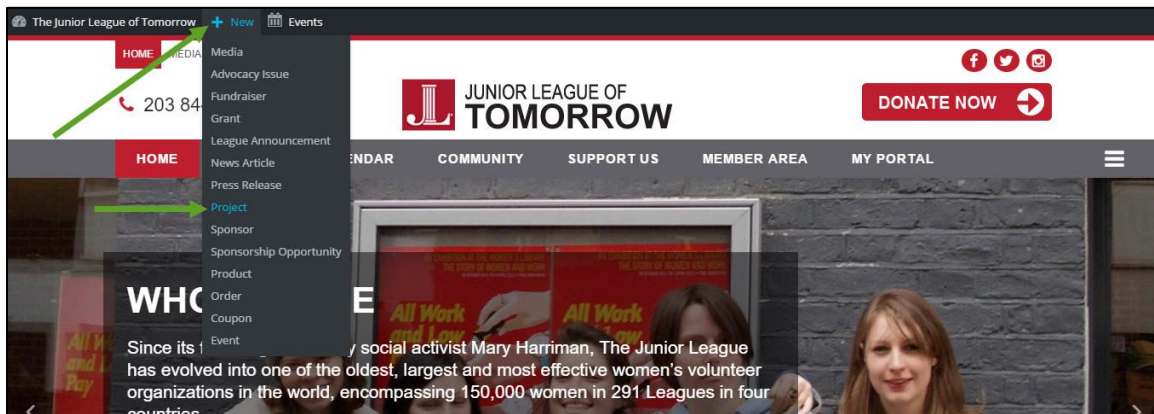
## Adding New Custom Post Types

To add a new custom post type to your Website, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.

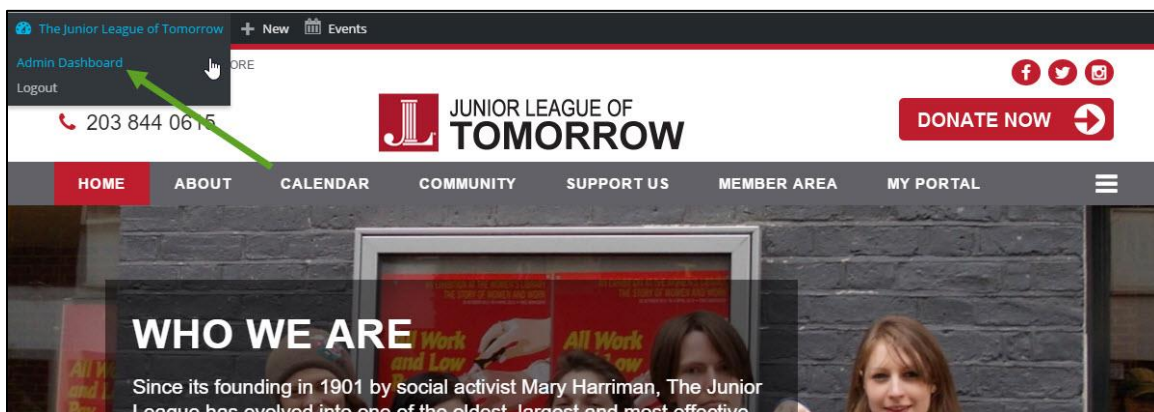
There are multiple methods for adding a new custom post type but all lead to the same page:

Click on the "New" link in the Admin Bar and select the post type from the drop down. This will take you to the details page for that particular post type.



or

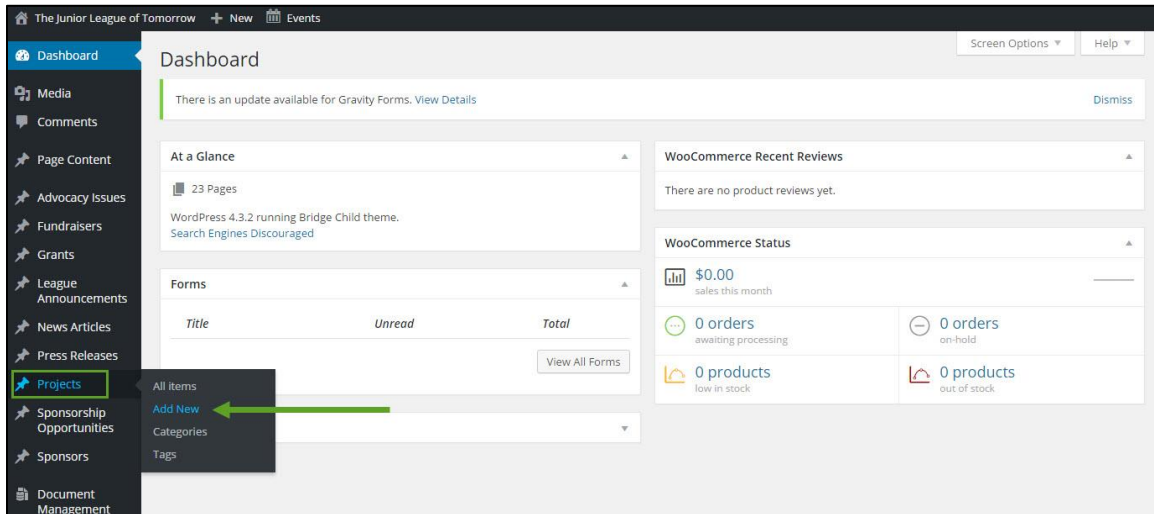
Click on the "Admin Dashboard" link to enter the administrative area of the website.



Then click on the custom post type in question you wish to add then click "Add New".

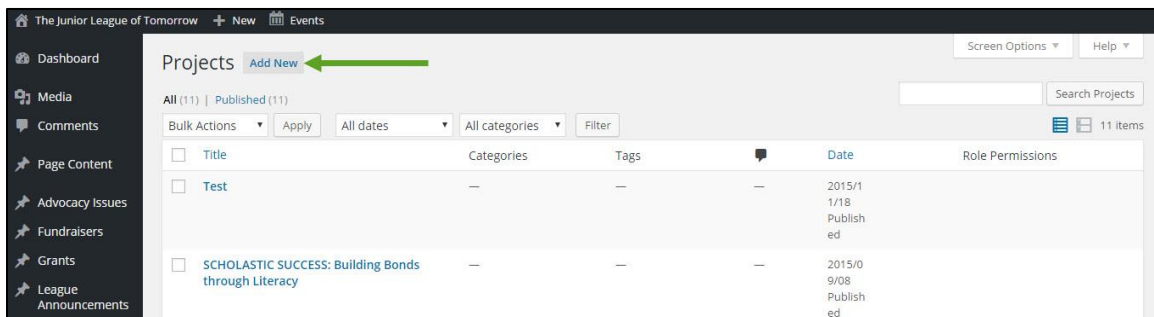


The "Add New" will also appear when you hover the cursor over the custom post type in the left hand side menu.



or

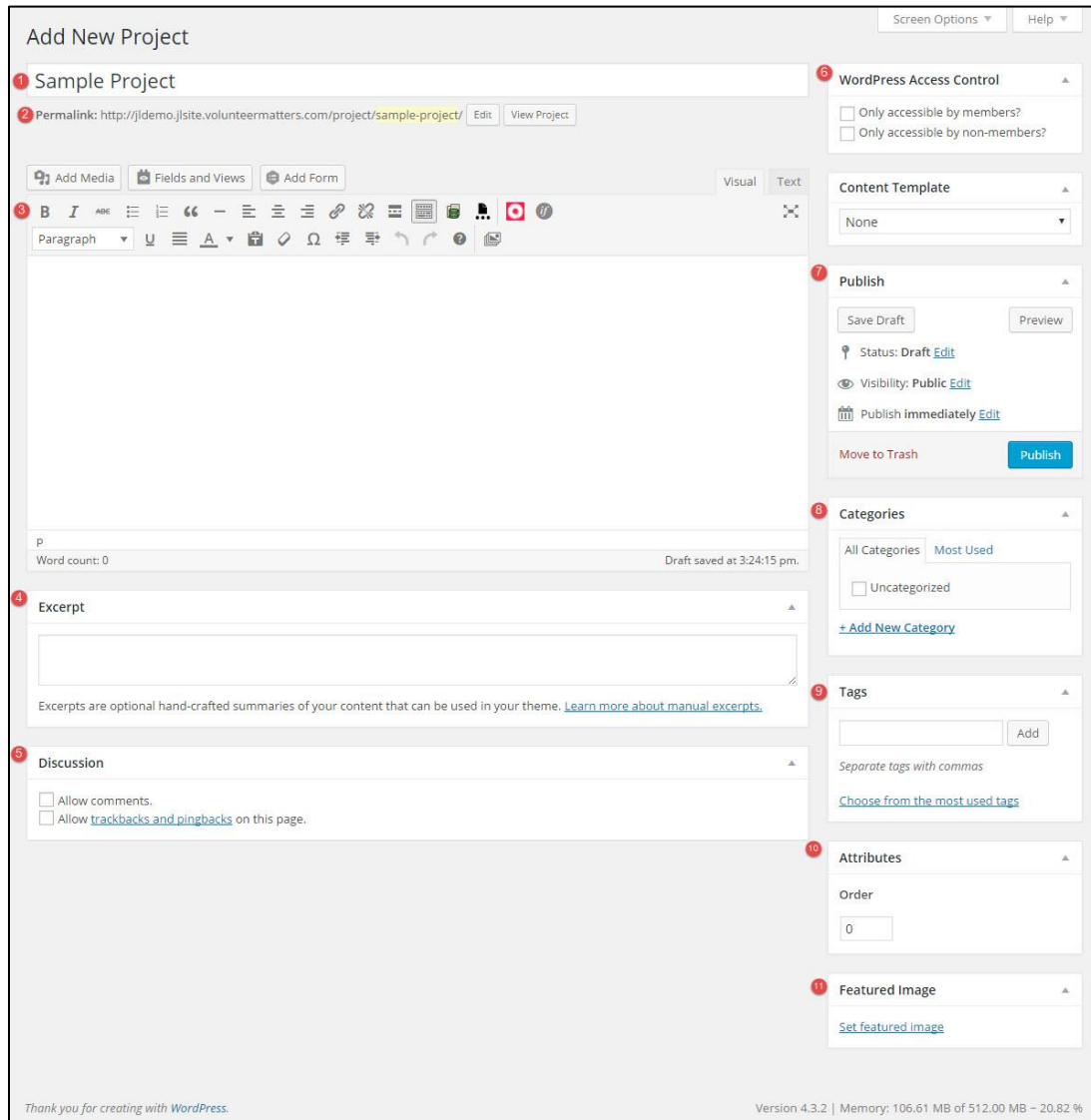
When you are on the listing of a particular post type or editing an existing post type there will be an "Add New" button.



Once you have used one of those methods to create a "New" custom post type page, you will be taken to a blank custom post type details page. Like most pages you can use the Screen Options to remove unnecessary elements.

**The only difference between the first grouping of custom post types and the second grouping (News, Press Releases) is that the first group the display order of the items is based upon the field on the details page called "Order" in the Attributes box and in second group the order is based on the published date and time.**

Here is a screenshot of the first group blank details page. The second group does not contain the "Attributes" box as display order is set by Published date/time.



Depending on what you have removed via the Screen Options, the typical elements needed for Custom Post Type are the following:

### 1. Title/Headline Box

The title of your post. You can use any phrases, words or characters. Avoid using the same title twice it might cause problems. You can use commas, apostrophes, quotes, hypens/dashes and other typical symbols in the post like "My Site - Here's Lookin' at You, Kid". WordPress will then clean it up to generate a user-friendly and URL-valid name of the post (also called the "post slug") to compose the permalink for the post.

### 2. Permalink

Permalink stands for "permanent link". That means a post URL that contains a user-friendly post name derived from the post title which could change,

although not recommended, but in a more controllable way. This post name (also referred to as "post slug" or just "slug") can be edited. The permalink is automatically generated based on the title you set to the post and is shown below the title field. Punctuation such as commas, quotes, apostrophes, and invalid URL characters are removed and spaces are substituted with dashes to separate each word. If your title is "My Site - Here's Lookin' at You, Kid", it will be cleaned up to create the slug "my-site-heres-lookin-at-you-kid". You can manually change this, maybe shortening it to "my-site-lookin-at-you-kid".

### 3. Body Copy Box

The blank box where you enter your writing, links, links to images, and any information you want to display on your site. When writing your post, you have the option of using the Visual or Text mode of the editor. The visual mode lets you see your post as is, while the Text mode shows you the code and replaces the WYSIWYG editor buttons with quicktags buttons.

### 4. Excerpt

A summary or brief teaser of your post featured on the page of your site where the particular custom post type is displayed. If you do not enter a manual excerpt the system will automatically use as the excerpt the first 55 words of your post. If you use the manual "Excerpt" field when editing the post, this will be used no matter what.


### 5. Discussion

Options to enable interactivity and notification of your posts. This section hosts two check boxes: Allow Comments\* on this post and Allow trackbacks and pingbacks on this post. If Allowing Comments is unchecked, no one can post comments to this particular post. If Allowing Trackback and Pingbacks is unchecked, no one can post pingbacks or trackbacks to this particular post.

\*Some custom post pages have comments removed all together on their display page so it does not matter what setting is checked here.

### 6. Wordpress Access Control

This element determines if the post is Member only or Public. If it is a member only element, you will check "Only accessible by members?" otherwise by default it is a publicly available post.



WordPress Access Control ▲

Only accessible by members?

Only accessible by non-members?

## 7. Publish box

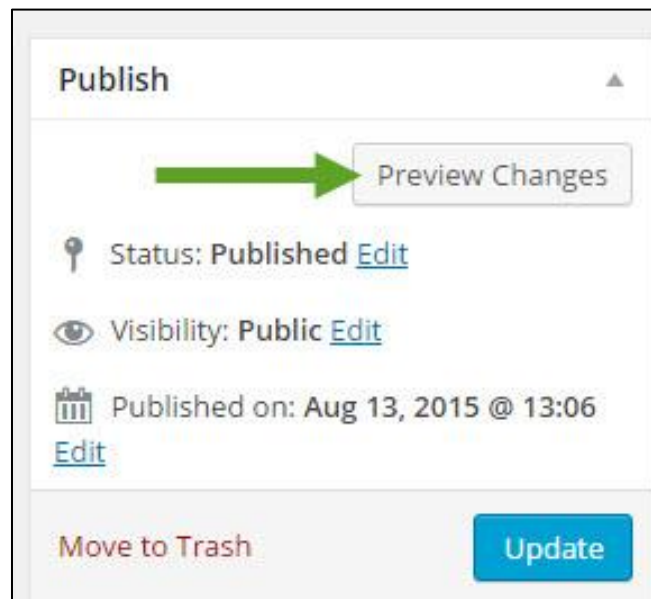
There are 3 main elements in this box: Status, Visibility, and Published.

*Status* can be "Published", "Pending Review", or "Draft". For Custom Post Types, this should remain as "Published" if you want it live on the website or Pending Review or Draft to make it only available on the Admin Dashboard.

*Visibility* - This determines how your post appears to the world. Public posts will be visible by all website visitors once published. Password Protected posts are published to all, but visitors must know the password to view the post content. Private posts are visible only to you (and to other editors or admins within your site) FOR THE MOST PART YOU WILL ALWAYS LEAVE AS PUBLIC.

*Published* will show the date/time the page content was created (this also determines the order of the Custom Post Type in the page content list and with News Articles, Press Releases, and League Announcements, the display order on the website itself.

For the most part you will only click the "Publish/Update" button in this box to either publish your custom post the first time or to update your custom post. I would recommend the "Preview Changes" button before clicking the "Publish/Update" button.



This opens up a new browser window of the post to allow you to review the new custom post type or any changes to an existing custom post before committing them.

## 8. Categories


The general topic the post can be classified in. This is typically not used but if desired you can categorize your Custom Post types for more filtering options.

## 9. Tags

These can be used with Custom Post types as micro-categories. Posts with similar tags are linked together when a user clicks one of the tags. This is only for those post types where tags are displayed. By default only News Articles, Press Releases, and League Announcement display tags. Add new tags to the post by typing the tag into the box and clicking "Add". You can also choose from the most used tags or when typing the tag name in the box, if one exists that matches it will be displayed so you can click on it.

NEWS ARTICLE 3

Home > News Article 3



**04 SEP NEWS ARTICLE 3**

Posted at 17:52h in Uncategorized by VolunteerMatters · 0 Comments · 0 Likes

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**TAGS:** Fundraisers ←

NO COMMENTS

## 10. Attributes

This box is only available on the first group of custom post types (Projects, Fundraisers, etc.) and Sponsor posts. The Order field allows you to set and change the display order of your posts on those pages where they are

aggregated. It is a numerical order, so one configured with 1 will appear before one configured with 2. We recommend that you use 10, 20, 30, etc. as your ordering so you can easily make changes to one post without having to update too many separate custom posts. If two posts share the same number the, the display order then reverts to the post's published date/time (descending).

## 11. Featured Image

This is the image that is chosen as the representative image for your Custom Post type. On the page that the custom post type aggregates, a thumb-nailed version of the feature image will be displayed next to the post title and excerpt.



The featured image is then displayed on the custom post type page above the body content.



The display may be different for different custom post types or if you have a custom website design/theme. Please [contact support](#) if you have any questions.



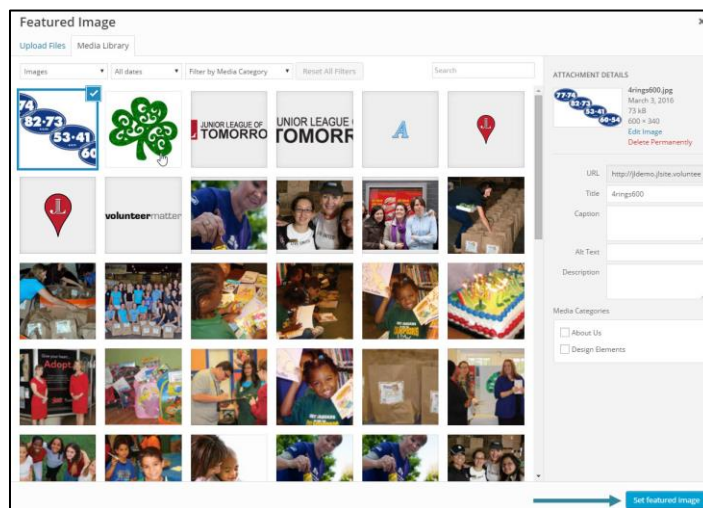
To set a Featured Image click "Set Featured Image".



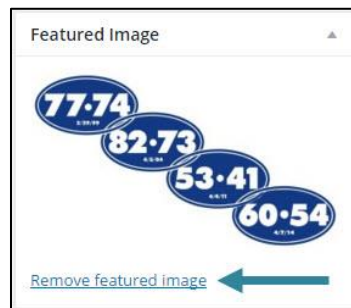
You will see an uploading screen identical to that used when inserting an image into a post or page content. Follow the on-screen prompts to choose the image from your computer and upload it or choose it from one of the images already in your Media Library.

Once the image has successfully been uploaded, you'll see one or more images displayed as thumbnails. Click on the one you want to use as a featured image. It will then appear outlined in blue with a checkmark. If desired, you can add a caption and alt text under the Attachment Details area (optional).

Next, click the button Set Featured Image at the bottom right.



To remove or change a featured image, simply re-open the post and click "Remove featured image" in the Featured Image box.





Once you finished configuring your new custom post type you will then click the "Publish" button and it will be added to the page which aggregates that custom post type and the post type itself will be available by URL.

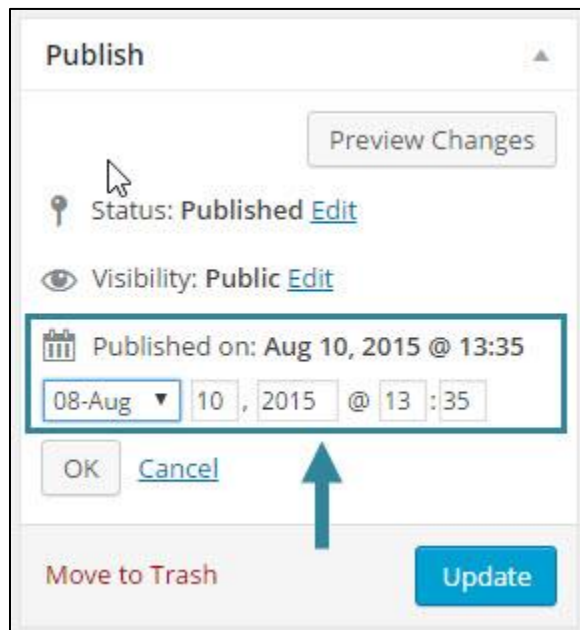
If you are editing an existing custom post type, once you make your necessary changes, you will click the "Update" button and your changes will be committed and display on the post in question and the page where that custom post type is aggregated.

For more information on Adding Images and File Downloads to your custom post type body click [here](#).

## Second Group Display Order

As stated above, The only difference between the first grouping of custom post types and the second grouping (News, Press Releases) is that the first group the display order of the items is based upon the field on the details page called "Order" in the Attributes box and in second group the order is based on the published date and time.

To change a post's published date and time, you will navigate in the admin dashboard to the post in question and click edit. Then in the "Published box" you will click "Edit" and then modify the Month, Day, Year and time (24 hour clock) then click "OK" to update the date/time and then "Update" to commit your changes to the post.



**Publish**

Preview Changes

Status: **Published** [Edit](#)

Visibility: **Public** [Edit](#)

Published on: Aug 10, 2015 @ 13:35

08-Aug 10, 2015 @ 13 :35

OK [Cancel](#)

Move to Trash [Update](#)

## Adding New Sponsor Custom Post Types

Sponsor custom post types are a unique custom post type that includes three main elements:

Sponsor Level\*\*

Logo Image

Logo URL

There are additional standard items (title, published, etc.) but those three are what make this post type unique.

*\*\*At this time this is purely informational and only appears in the dashboard. This has no bearing on the slider or the display of the sponsor images.*

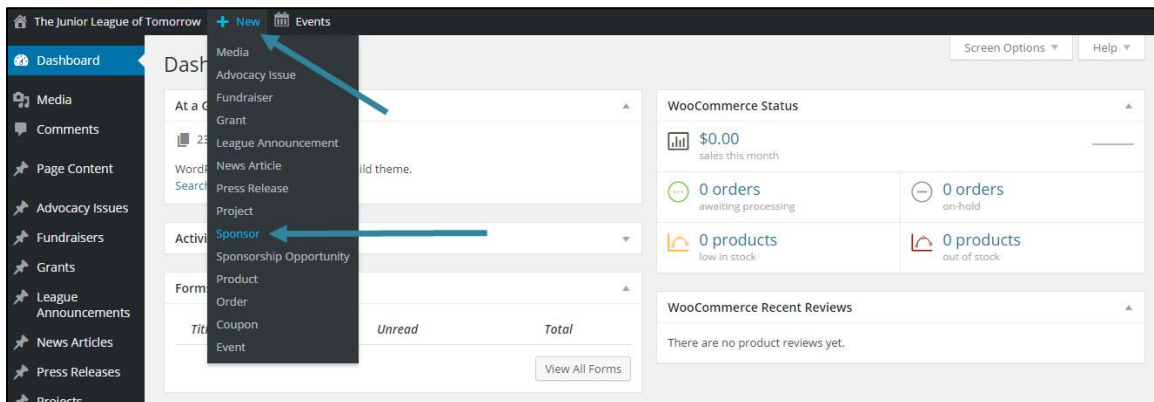
Sponsor images only display on the homepage where the Sponsor slider is configured by Closerware Support. Adding/Removing sponsor posts in the Admin Dashboard will automatically update the homepage slider.

To add a new Sponsor custom post type to your website, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.

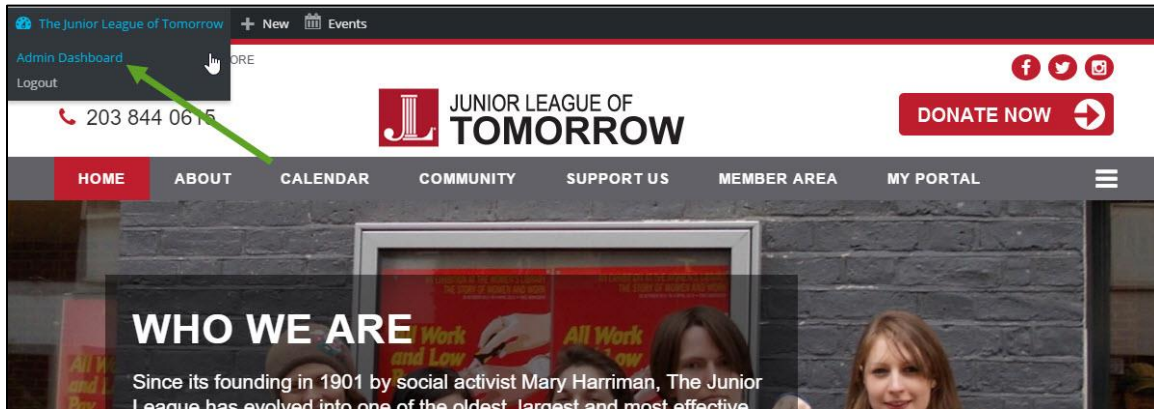
There are multiple methods for adding a new sponsor custom post type but all lead to the same page:

Click on the "New" link in the Admin Bar and select the Sponsor from the drop down. This will take you to the Add New Sponsor page.

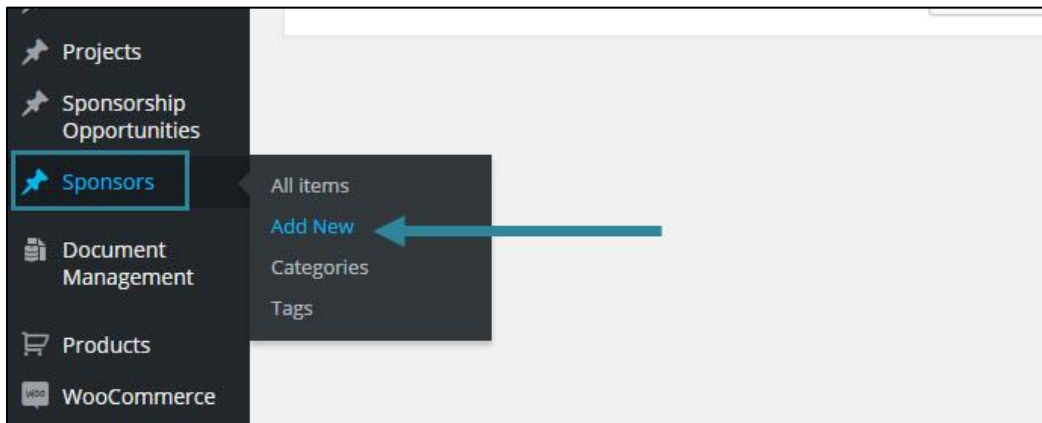


or

Click on the "Admin Dashboard" link to enter the administrative area of the website.

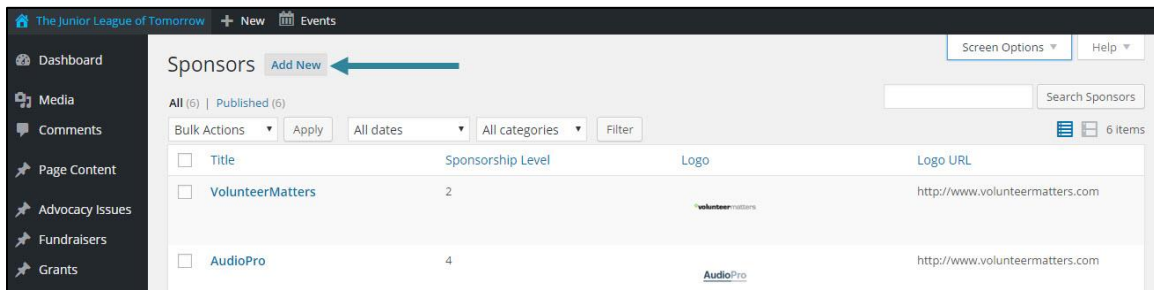


Then click on the custom post type in question you wish to add then click "Add New". The "Add New" will also appear when you hover the cursor over the custom post type in the left hand side menu.



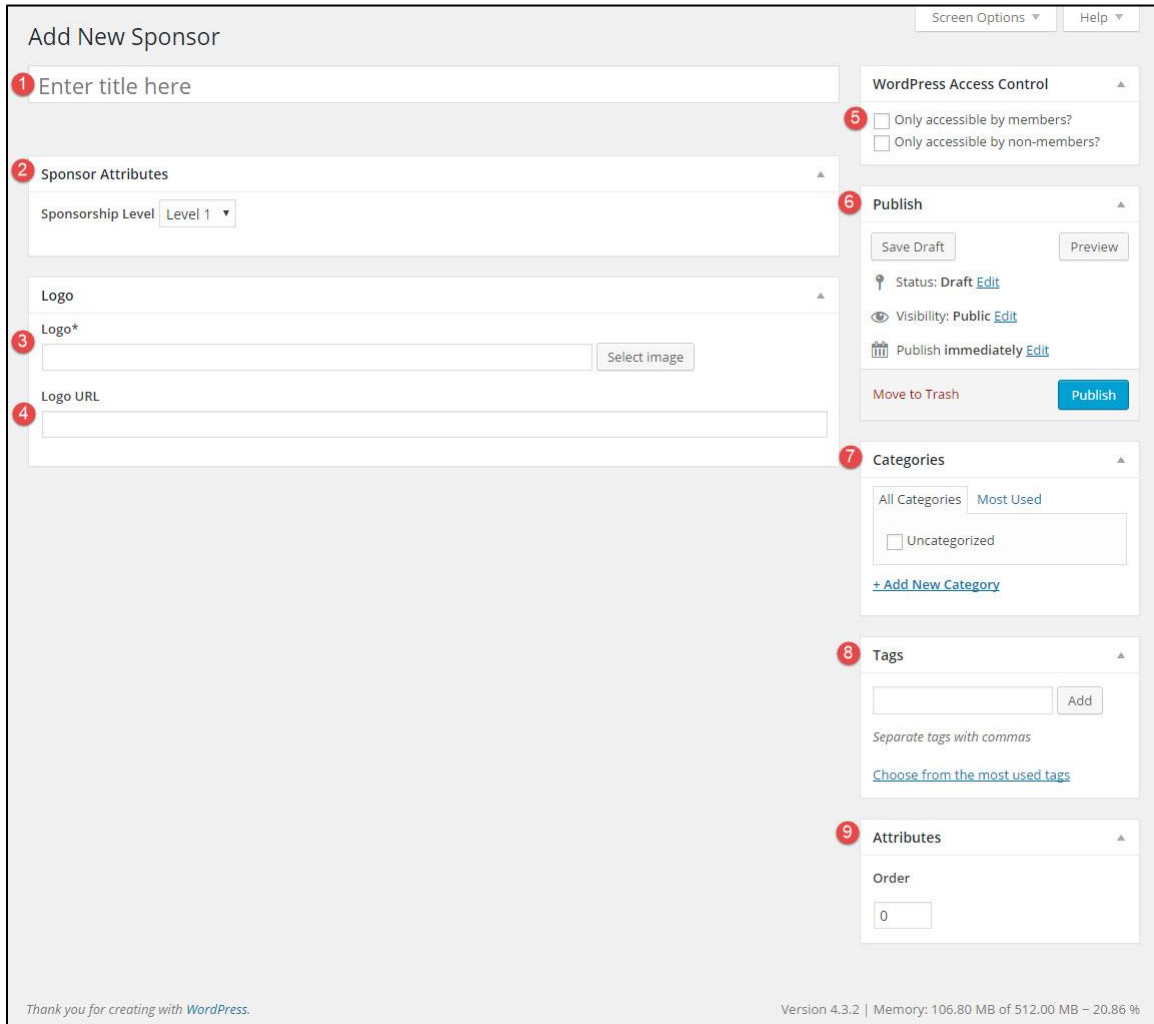
or

When you are on the listing of a particular post type or editing an existing post type there will be an "Add New" button.



Once you have used one of those methods to create a "New" post, you will be taken to a blank "Add New Sponsor" custom post type details page. Like most pages you can use the Screen Options to remove unnecessary elements.

Here is a screenshot of Sponsor details page:



Depending on what you have removed via the Screen Options, the typical elements needed for Custom Post Type are the following:

### 1. Title/Headline Box

The title of your post. You can use any phrases, words or characters. Avoid using the same title twice it might cause problems. You can use commas, apostrophes, quotes, hypens/dashes and other typical symbols in the post like "My Site - Here's Lookin' at You, Kid". WordPress will then clean it up to generate a user-friendly and URL-valid name of the post (also called the "post slug") to compose the permalink for the post. For Sponsors this is only used in the backend.

## 2. Sponsor Attributes

Here you can set a sponsorship Level on each Sponsor custom post type. At this time this is only informational on the backend.

## 3. Logo Image

Here you can browse to your Media Library to add the Sponsor Image to the homepage slider. You will see an uploading screen identical to that used when inserting an image into a post or page content. Follow the on-screen prompts to choose the image from your computer and upload it or choose it from one of the images already in your Media Library.

Once the image has successfully been uploaded, you'll see one or more images displayed as thumbnails. Click on the one you want to use as a Sponsor Logo image. It will then appear outlined in blue with a checkmark. Then click "Select". You will then be returned to your Sponsor details page with a thumbnail of the image.

## 4. Logo URL

Here you will enter the URL that will be added to your Logo Image. This automatically opens the link in a new browser window when a visitor clicks on it. This is optional. If no URL is entered the image will not feature a clickable link.

## 5. Wordpress Access Control

This element determines if the post is Member only or Public. If it is a member only element, you will check "Only accessible by members?" otherwise by default it is a publicly available post.



WordPress Access Control

Only accessible by members?

Only accessible by non-members?

## 6. Publish box

There are 3 main elements in this box: Status, Visibility, and Published.

*Status* can be "Published", "Pending Review", or "Draft". For Custom Post Types, this should remain as "Published" if you want it live on the website or Pending Review or Draft to make it only available on the Admin Dashboard.

*Visibility* - This determines how your post appears to the world. Public posts will be visible by all website visitors once published. Password Protected posts are

published to all, but visitors must know the password to view the post content. Private posts are visible only to you (and to other editors or admins within your site) FOR THE MOST PART YOU WILL ALWAYS LEAVE AS PUBLIC.

*Published* will show the date/time the page content was created (this also determines the order of the Custom Post Type in the Sponsor list..

For the most part you will only click the "Publish/Update" button in this box to either publish your Sponsor post the first time or to update your custom post.

#### 7. **Categories**

The general topic the post can be classified in. This is typically not used but if desired you can categorize your Custom Post types for more filtering options.

#### 8. **Tags**

These can be used with Custom Post types as micro-categories. Posts with similar tags are linked together when a user clicks one of the tags. This is only for those post types where tags are displayed. By default only News Articles, Press Releases, and League Announcement display tags. Sponsors will not use Tags.

#### 9. **Attributes**

This box is only available on the first group of custom post types (Projects, Fundraisers, etc.) and Sponsor post types. The Order field allows you to set and change the display order of your Sponsor Images on within the Homepage Sponsor Slider. It is a numerical order, so one configured with 1 will appear before one configured with 2. We recommend that you use 10, 20, 30, etc. as your ordering so you can easily make changes to one post without having to update too many separate custom posts. If two posts share the same number the, the display order then reverts to the post's published date/time (descending).

The display may be different for different custom post types or if you have a custom website design/theme. Please [contact support](#) if you have any questions.

## Common HTML Editor Tasks

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Besides entering verbiage there are three common tasks that you will utilize when editing a post information or page content:

[Adding Images](#)

[Adding File Downloads](#)

[Adding Hyperlinks](#)

### To add Images using the HTML/WYSIWYG Editor:

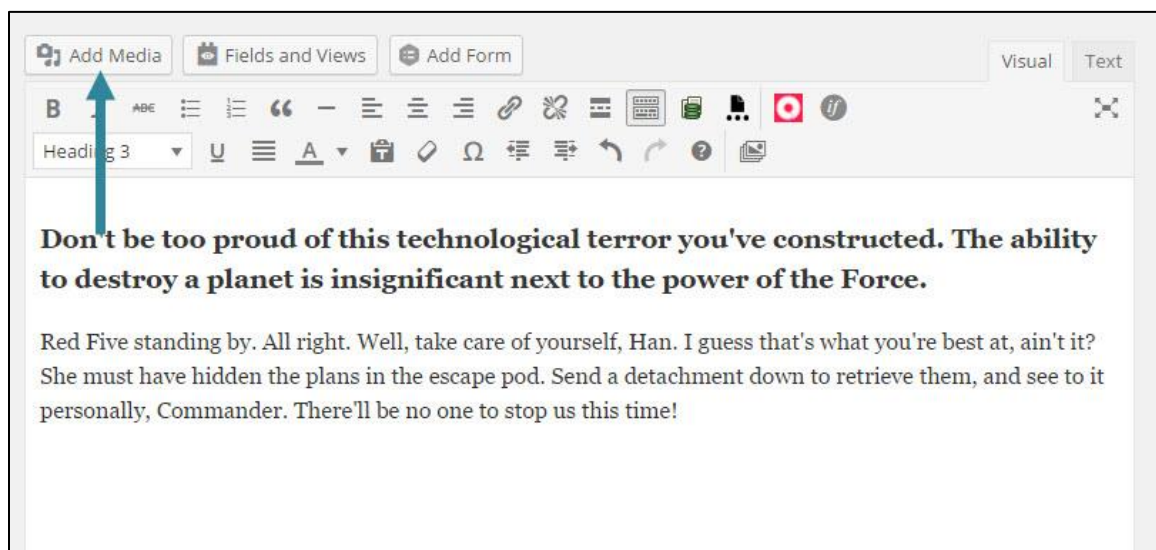
#### Step 1 = Placing your cursor

In order to add an image to your page content, post, event, estore item, etc., you must first insert your cursor in the place in the text where you want the image to appear. By placing your cursor within your text, you can add Images inline with your content. You can also place your cursor on a blank line if you want the image to appear by itself instead.

*Tip: It's a good idea to **place your cursor on the left margin of your text**, even if you want the image to appear on the right. That's because there is a special setting called *Alignment* that allows you to control whether the image appears on the right or the left side of the text. It even controls how text flows around the image automatically.*

#### Step 2 – Click the Add Media button

Once you've placed your cursor on the line where you want your image to appear, click on the Add Media button to launch the media uploader interface, and then select the Insert Media option from the list of actions in the left side of the media uploader window.

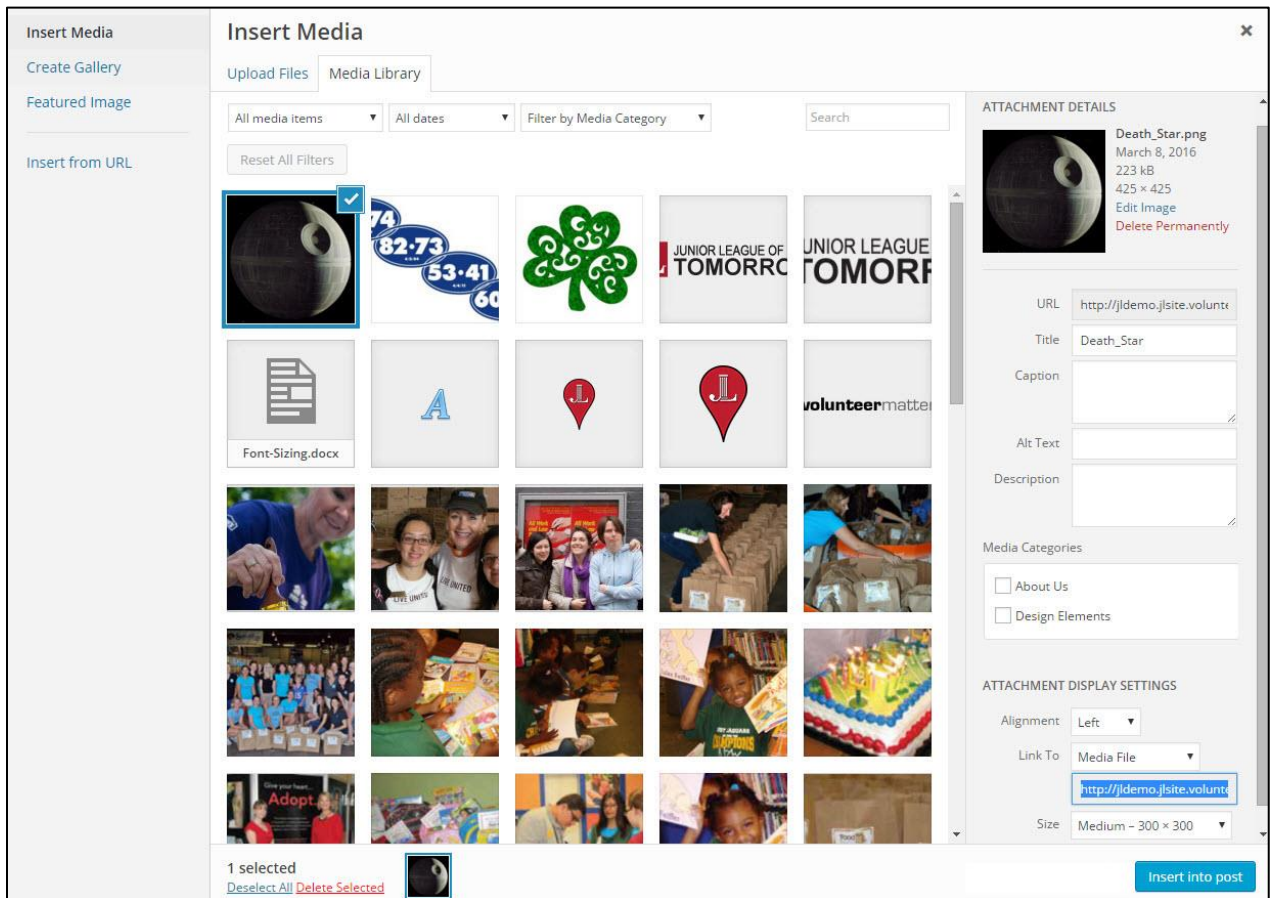




### Step 3 – Add or Select Your Image

You can add or select the image you want to add to your post by choosing from either of the following options in the center of the media uploader window:

- **Upload Files:** Upload the image you want to use from your computer by dragging it into the upload area.
- **Media Library:** Select from any previously uploaded images in the media library by clicking on the one you wish to add to your page or post.



Once you have selected or uploaded the image you want to add, you will see a checkbox next to the thumbnail confirming your selection, and see information about it displayed in the Attachment Details pane on the right hand side of the media uploader interface.

### Step 4 – Attachment Details


The **Attachment Details** pane displays a small un-cropped thumbnail of the image, as well as important information such as the filename, date uploaded, and image dimensions in pixels.

There are also action links that allow you to **Edit Image**, which takes you to the [Edit Image page](#), or to **Delete Permanently** to remove the image from your site.

In addition, you can edit the following media information:

- **Title:** The title of this media.
- **Caption:** The caption for this image. The text you enter here will be displayed below the image.
- **Alternate Text:** Enter the Alt text for the image, e.g. “The Mona Lisa” to describe the media.
- **Description:** A description for this particular media.
- **Media Categories:** Assign the media to a particular category (customizable) to make categorizing and filtering of media library files/images to save hours of searching through the media library. Typically the default categories will reflect your site hierarchy and include some built-in: design elements, estore, news, etc. An administrator can add additional categories as desired. An image or file can be associated with multiple categories. The media categories are set via the Media Categories link under Media in your Admin Dashboard.

**ATTACHMENT DETAILS**



Death\_Star.png  
March 8, 2016  
223 kB  
425 × 425  
[Edit Image](#)  
[Delete Permanently](#)

URL

Title

Caption

Alt Text

Description

Media Categories

About Us  
 Design Elements

For more information on these media settings (except Media Categories), see the [Edit Media page](#) from Wordpress' website.

### Step 5 – Attachment Display Settings

The **Attachment Display Settings** pane controls how the image is displayed when viewed on the site.

You have options to set how you would like the image aligned on the page (in relation to the text and margins) and what the link behavior of the image will be. In addition you can set what size image you would like to display on your page.

**ATTACHMENT DISPLAY SETTINGS**

Alignment

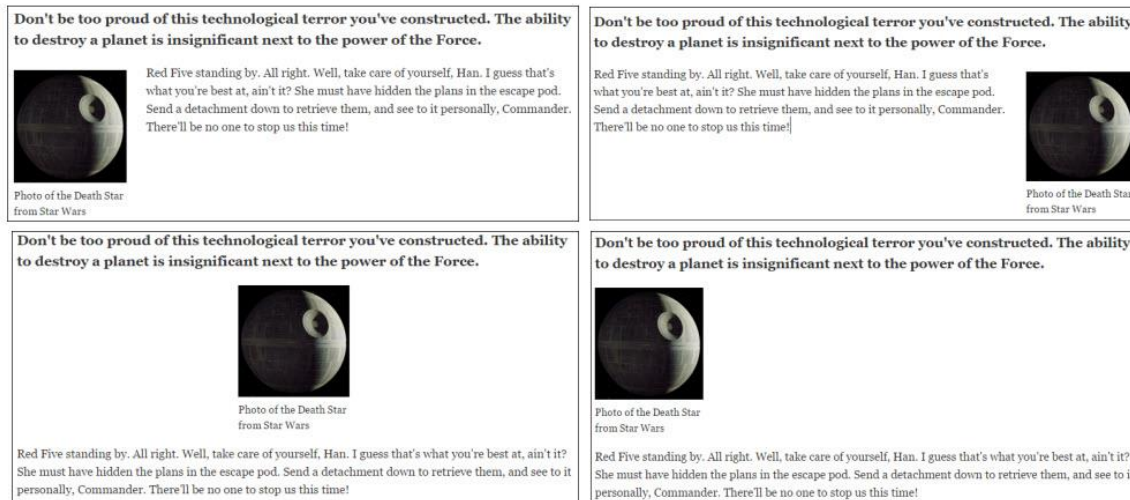
Link To

Size

### Image Alignment

The Alignment setting allows you to determine where you would like the image to appear in your content area and how it interacts with any text on the page. You have the following image alignment options to choose from:

- **Left:** Aligns the image on the left hand margin, and any text that is on the page wraps (or flows) around the image to the available space on the right.
- **Right:** Aligns the image on the right hand margin, and any text that is on the page wraps (or flows) around the image to the available space on the left.
- **Center:** Aligns the image to the center of the page, with no text displayed around it.
- **None:** Inserts the image in to the page with no alignment



Top row: Left and Right alignments. Bottom row: Center and "None" alignments

### Image Link

The Link To settings determine the URL/web address to which the image will be linked when clicked on by a visitor to your site. You can specify the following image link settings:


- **Attachment Page:** Links your inserted image to its WordPress media attachment page.
- **Media File:** Links your inserted image directly to the original, full-size version of the file.
- **Custom URL:** Allows you to set a custom link URL for your inserted image to link to when clicked.
- **None:** This setting will remove the link completely, rendering the image “un-clickable”.

## Image Size

The Size settings determine the size of the image you are adding to your site. By default WordPress creates a range of three image size for you to choose from:

- **Thumbnail:** Displays a small thumbnail-sized version of your image on the page/post. Note, by default the Thumbnail size is a square, so some cropping of your original image may occur.
- **Medium:** Displays a medium-sized version of your image on the page/post. This is a good size to use with Left/Right alignments, as it leaves sufficient space for legible text to either side.
- **Full Size:** Displays a full-sized version of your image on the page/post. Note: WordPress will determine the width of the content column of your theme, and display the largest possible image for that space. If your original image is larger than this column width, the full size of the image may not be displayed.

With Medium and Full Size images you can click on the image in the HTML editor and from corners click on the corners and drag the image to a different size as well. This will maintain the image dimensions.

Don't be too proud of this technological terro  
to destroy a  at next to the

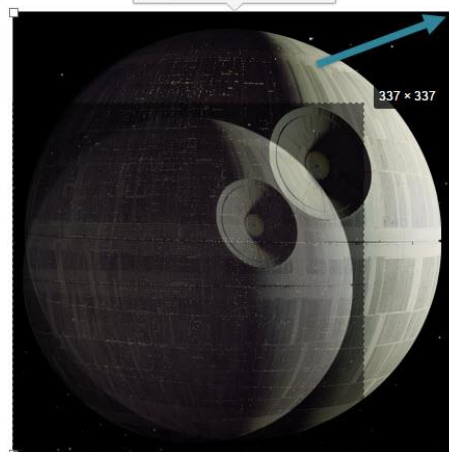
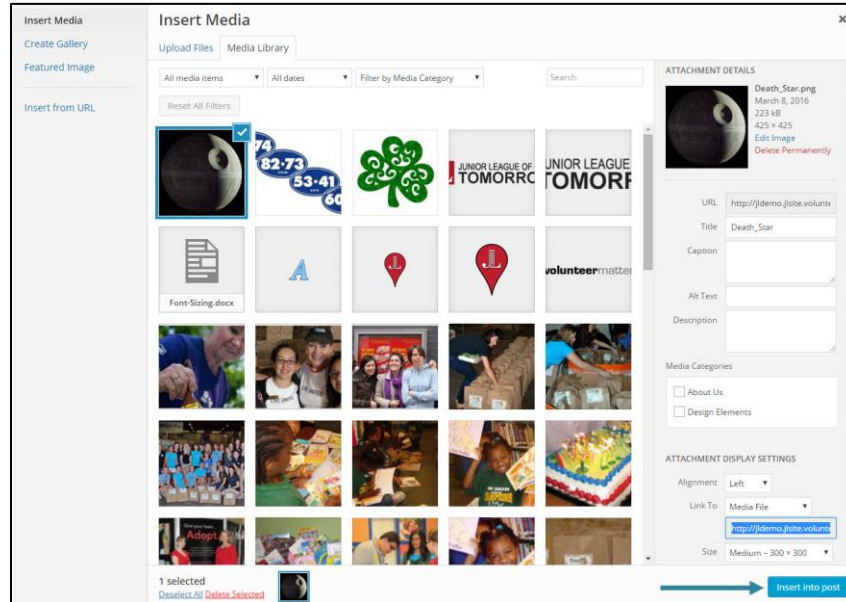


Photo of the Death Star from Star Wars

### Step 5 – Inserting the image

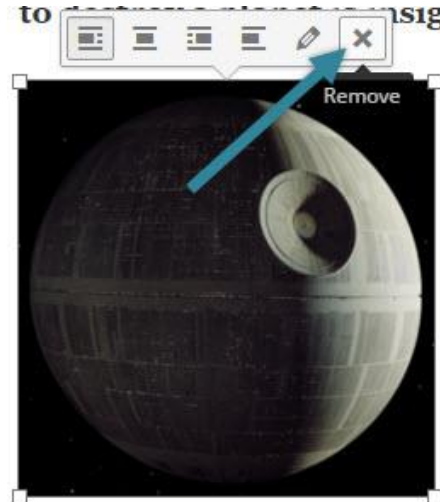
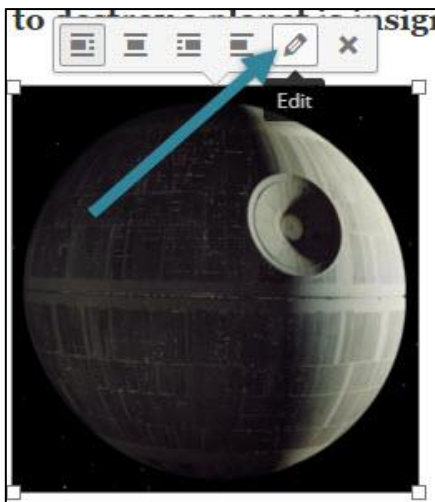
Once you have determined your image settings, click on the blue Insert into post or Insert into page button, to add the image to your page or post.



After the image uploader window closes, you will see the image in the text editor window, including a preview of the alignment of the image, if you have specified an image alignment.

At any time, you can edit the image settings by clicking on the image and then clicking on the Edit Image button in the image quick tools.

You can remove the image from your page/post by clicking on the Remove Image button.





## To add File Download links using the WYSIWYG Editor:

Within the Closerware WordPress website platform, there are two document and media areas available to use. One is the Media Library and the other is Document Management.

Media Library is the standard WordPress document area where there are no permissions associated with any files.

Document Management is an area where an administrator can create and keep files structured in categories/folders and comes with smart templates to embed files into content. It also allows the administrator to place permissions on categories/folders and files, to only allow logged in members to download and view those files.

Later in this document we will go over in more detail the difference between these two but for this section we will simply go over how to add file downloads from each within the HTML Editor.

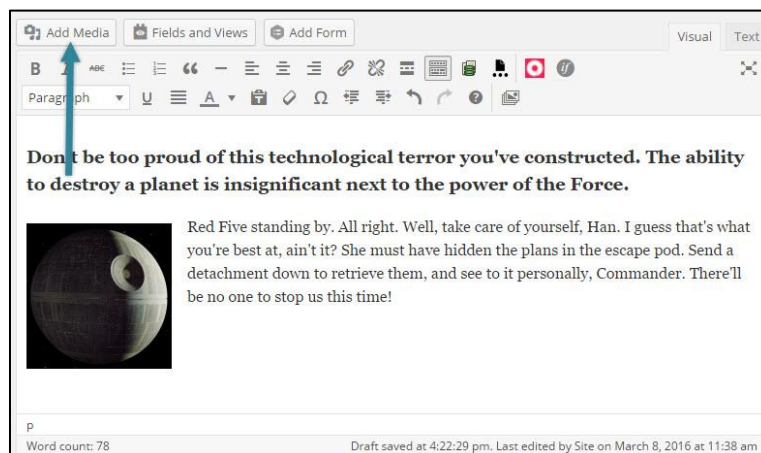
### **Media Library**

#### Step 1 – Placing your cursor

In order to place a download link, you must insert your cursor in place in the page where you want it to appear. You can add these links inline with your text, or you can place your cursor on a blank line if you want the link to appear by itself. You can also highlight existing text to add a file download link to. **However if you do highlight text it will be overwritten with the file's title. So you will need to highlight AND copy the text which you will add back later.**

#### Step 2 – Click the Add Media button

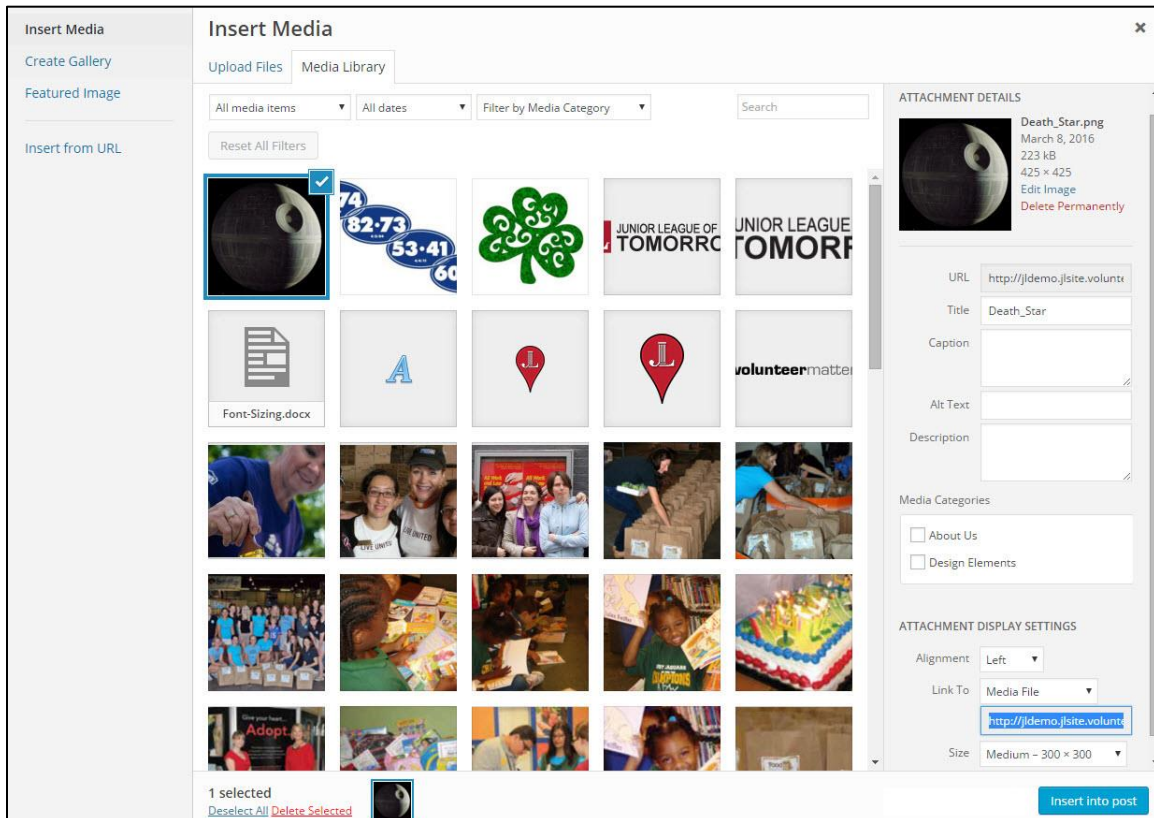
Once you've placed your cursor where you want your download link to appear, click on the Add Media button to launch the media uploader interface.



### Step 3 – Add or Select Your Download File

You can add or select the file you want to add to your page content or post by choosing from either of the following options in the center of the media uploader window:

- **Upload Files:** Upload the image you want to use from your computer by dragging it into the upload area.
- **Media Library:** Select from any previously uploaded images in the media library by clicking on the one you wish to add to your page or post.



The screenshot displays the WordPress Media Uploader interface. On the left, there are options for 'Insert Media', 'Create Gallery', 'Featured Image', and 'Insert from URL'. The main area is titled 'Insert Media' and has two tabs: 'Upload Files' and 'Media Library'. The 'Media Library' tab is active, showing a grid of thumbnails. The first thumbnail, 'Death\_Star.png', is selected with a blue checkmark. Below the grid, it says '1 selected' with 'Deselect All' and 'Delete Selected' links. On the right, the 'ATTACHMENT DETAILS' pane is open for the selected image. It shows the image thumbnail, filename 'Death\_Star.png', date 'March 8, 2016', size '223 kB', dimensions '425 x 425', and a 'Delete Permanently' link. Below this are fields for 'URL' (http://jldemo.jlsite.volunte...), 'Title' (Death\_Star), 'Caption', 'Alt Text', and 'Description'. There are also 'Media Categories' (About Us, Design Elements) and 'ATTACHMENT DISPLAY SETTINGS' (Alignment: Left, Link To: Media File, Link URL: http://jldemo.jlsite.volunte..., Size: Medium - 300 x 300). An 'Insert into post' button is at the bottom right.

Once you have selected or uploaded the file you want to add as a download link, you will see a checkbox next to the thumbnail confirming your selection, and see information about it displayed in the Attachment Details pane on the right hand side of the media uploader interface.

### Step 4 – Attachment Details




The **Attachment Details** pane displays a small un-cropped thumbnail of the image, as well as important information such as the filename, date uploaded, and image dimensions in pixels.

There are also action links that allow you to **Edit Image**, which takes you to the [Edit Image page](#), or to **Delete Permanently** to remove the image from your site.

In addition, you can edit the following media information:

- **Title:** The title of this media.
- **Caption:** The caption for this file. Not in use for files
- **Description:** A description for this particular media. The text you enter here will only be displayed on the attachment page.
- **Media Categories:** Assign the media to a particular category (customizable) to make categorizing and filtering of media library files/images to save hours of searching through the media library. Typically the default categories will reflect your site hierarchy and include some built-in: design elements, estore, news, etc. An administrator can add additional categories as desired. An image or file can be associated with multiple categories. The media categories are set via the Media Categories link under Media in your Admin Dashboard.

### ATTACHMENT DETAILS



Star-Wars-The-Force-Awakens-Final-Script.pdf  
March 8, 2016  
201 kB  
[Delete Permanently](#)

---

URL:

Title:

Caption:

Description:

Media Categories

About Us  
 Design Elements

---

### ATTACHMENT DISPLAY SETTINGS

Link To:

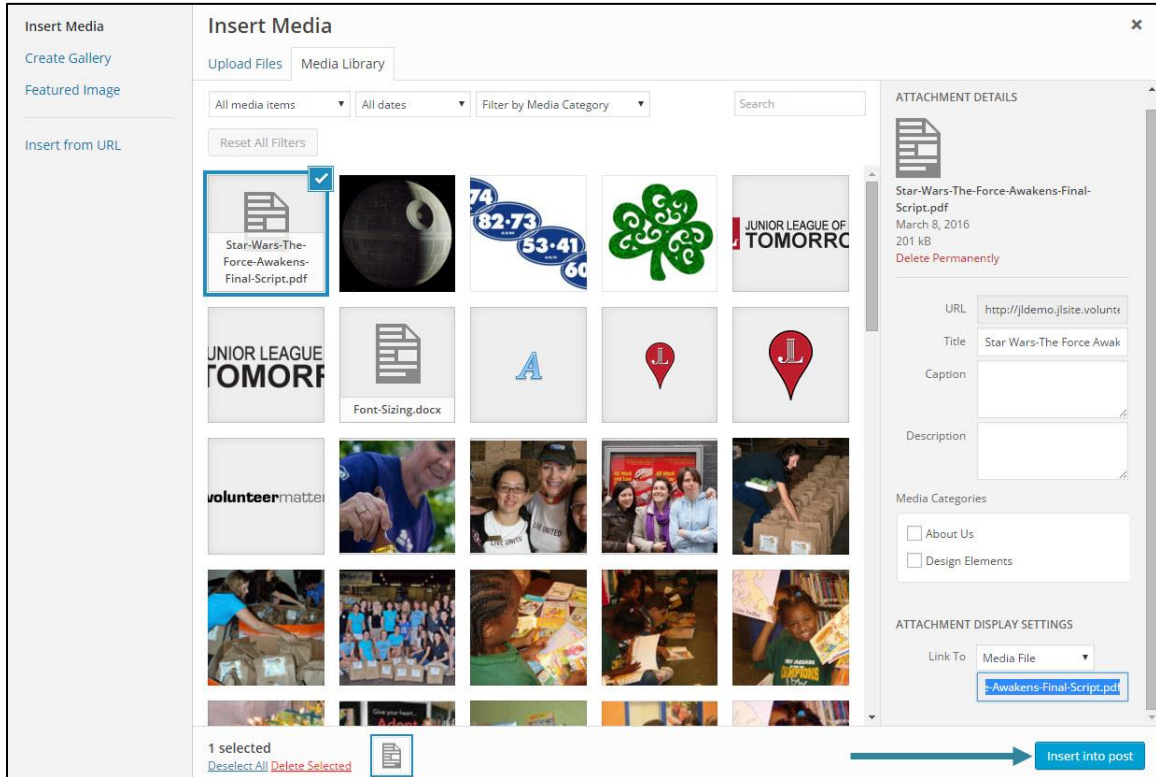
For more information on these media settings (except Media Categories), see the [Edit Media page](#) from Wordpress' website.

#### Step 5 – Attachment Display Settings

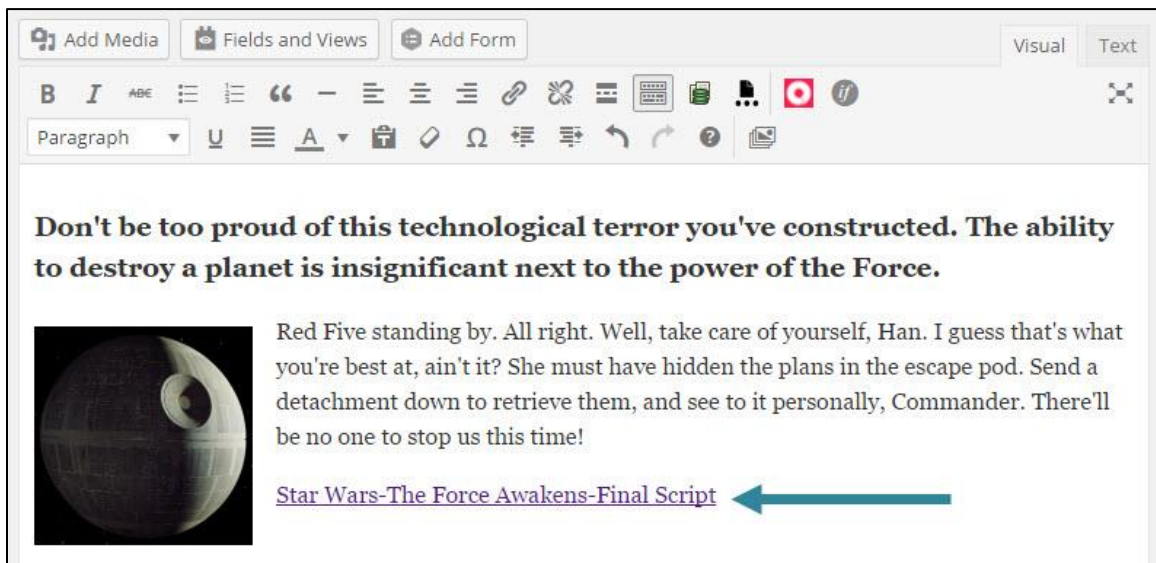
The **Attachment Display Settings** pane controls how the link to the file will function. This will default to "Media File" and you should leave it as such.

**Step 6 – Add the Download Link**

Once you have uploaded/selected the file you want to create a download link for, simply click on the blue “Insert into post” or Insert into page button.

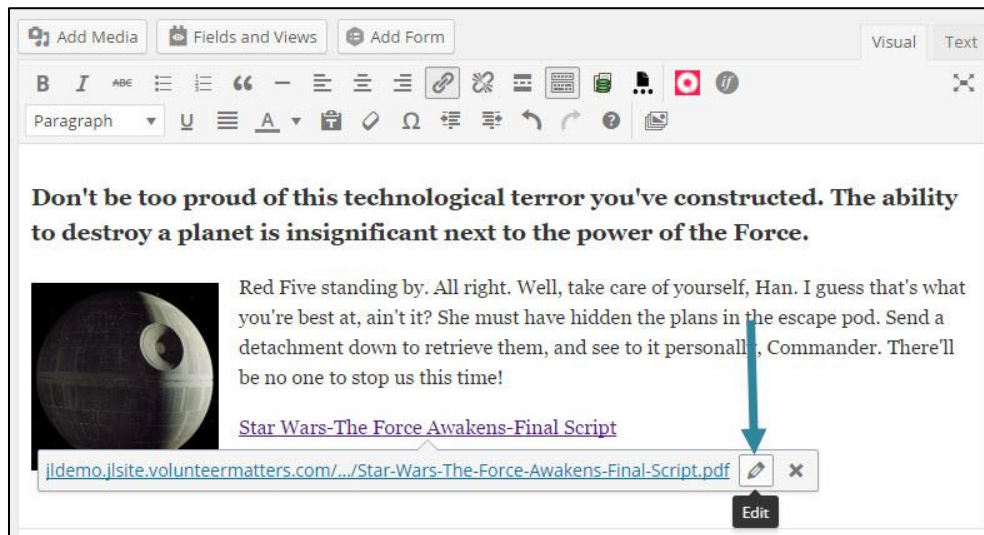


After the media uploader window closes, you will see the download link in the text editor window, utilizing the title text of the file.



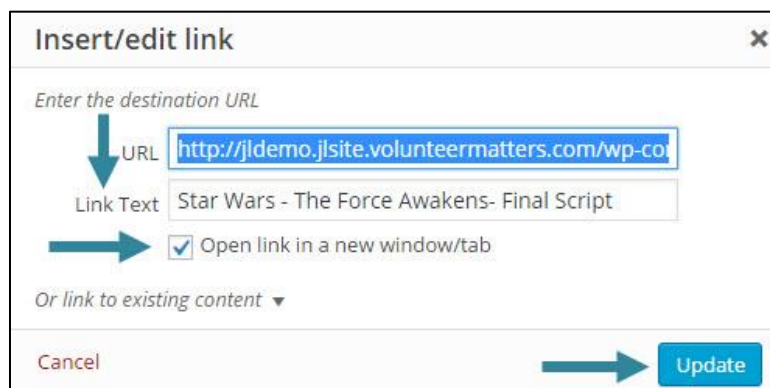
Now this might work if you are inserting the files into a blank area of content. But if you have highlighted text and went to Add Media, it will replace your highlighted text with file title. This is why we copied the highlighted text when we first began the process. ***This is also the step where you can designate if the file will open in a new window/tab.***

To update the file title text and/or set the link target window, you will click on the newly created file download link which will then display link properties where you can quickly edit or remove the link. Here we will click on the "Edit" button to open the link properties window.



To edit the link text you will highlight the current link text (file title) and then paste in the previously highlighted text.

To force the file download to open in a new window check the box for " Open link in a new window/tab". Then click update.

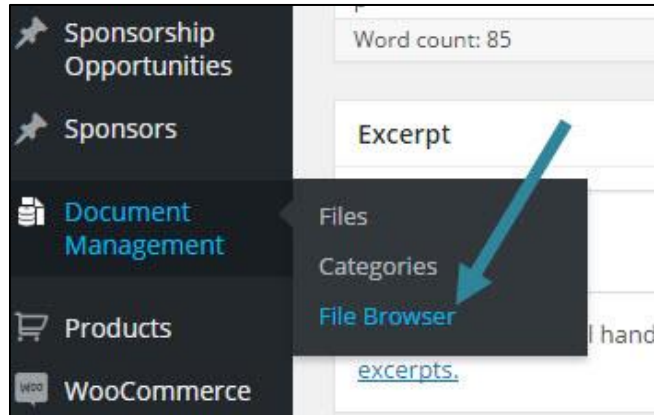


This will return you to your content where you can finish your changes and then click Publish (if new) or Update (if existing).

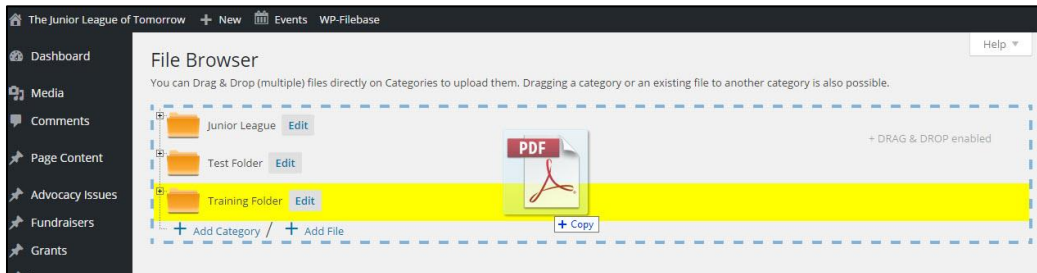
## Document Management

### Step 1 - Uploading the file

For the Document Management files you must first upload the file via the File Browser page under the Document Management section of the Admin Dashboard.

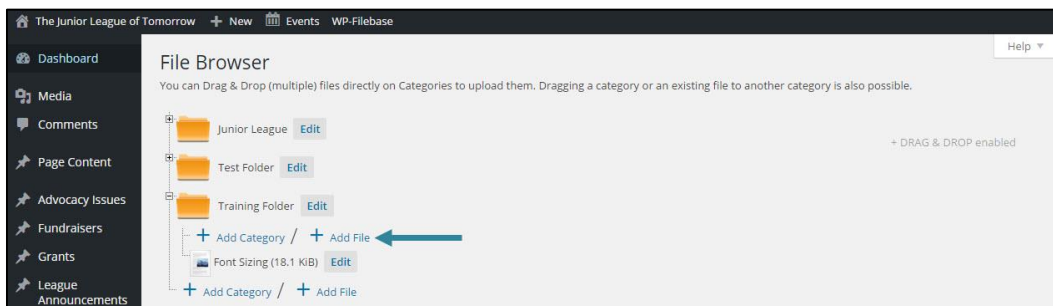


This will open the file browser page which is a visual representation of the categories and files that your organization has already created. You will navigate to the folder you wish to upload the file to and then you can either drag and drop the file from a folder on your local machine.



Or

You can click the "Add Files" link in the folder desired.



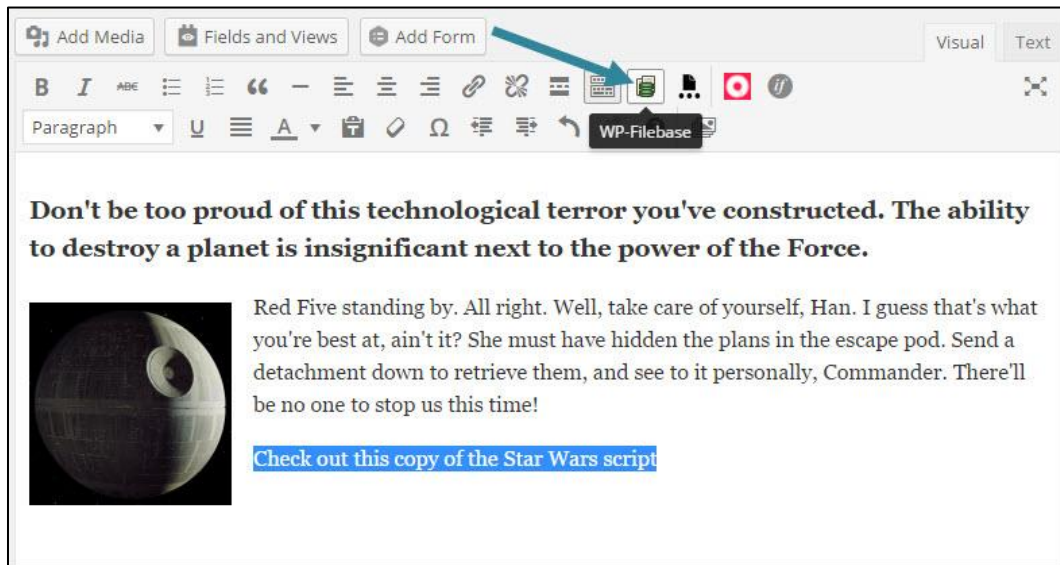
Once the file is finished uploading you will navigate back to the page content, custom post type, event, or eStore item you wish to add the file download link to.

### Step 2 – Placing your cursor

In order to place a download link, you must insert your cursor in place in the page where you want it to appear. You can add these links inline with your text, or you can place your cursor on a blank line if you want the link to appear by itself. You can also highlight existing text to add a file download link to.

### Step 3 – Click the WP-Filebase button

Once you've placed your cursor where you want your download link to appear or you have highlighted the text you wish to link from, click on the WP-Filebase button in the HTML editor toolbar to launch the WP-Filebase's Editor plugin interface which will insert the proper shortcode into the content.



### Step 4 – Select Your Download File

There are multiple options available to you via the WP-Filebase's Editor plugin interface but for your purposes you will only use two of them:

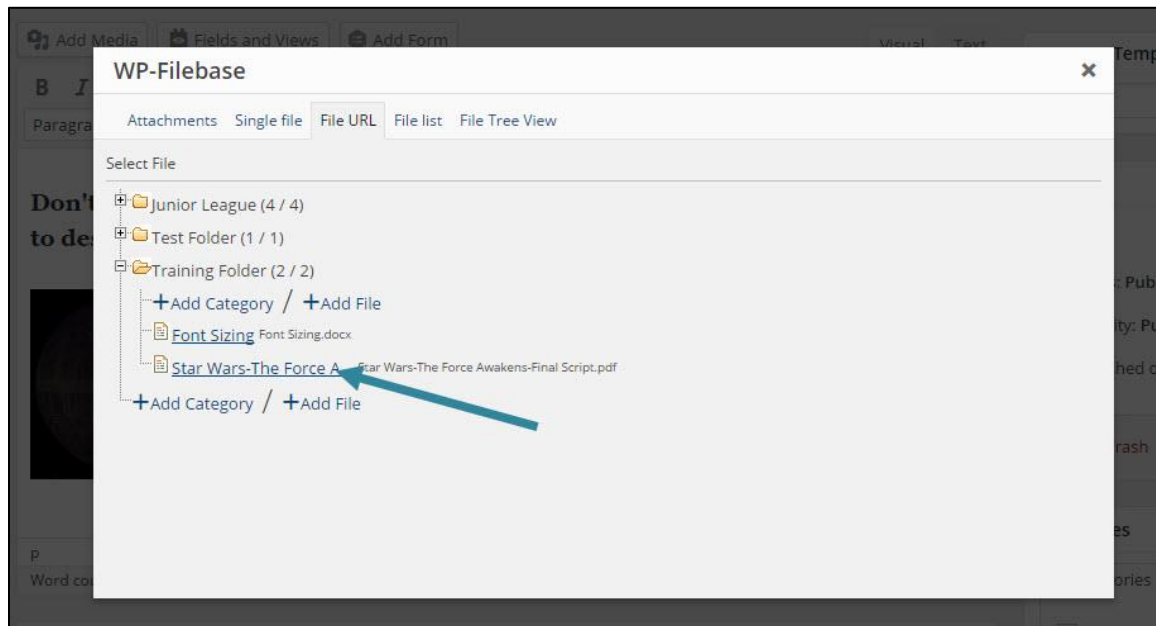
- File URL - This allows you to choose a single file to link to.
- File Tree View - This allows you to place the contents of an entire folder within content. This will be discussed further later in this document.

For 99% of the time you will just be using File URL. Once you click on the File URL tab it will display your folder view like your File Browser. You just need to locate your file and click on it.

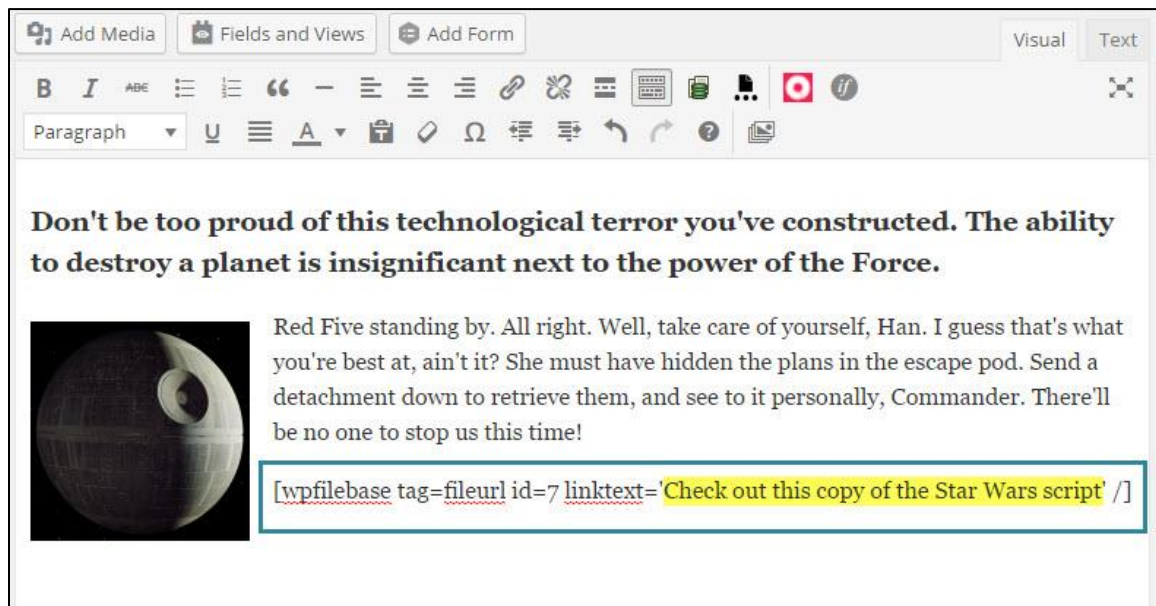


## Step 6 – Add the Download Link

Once you have located the file in question, you then click on file link

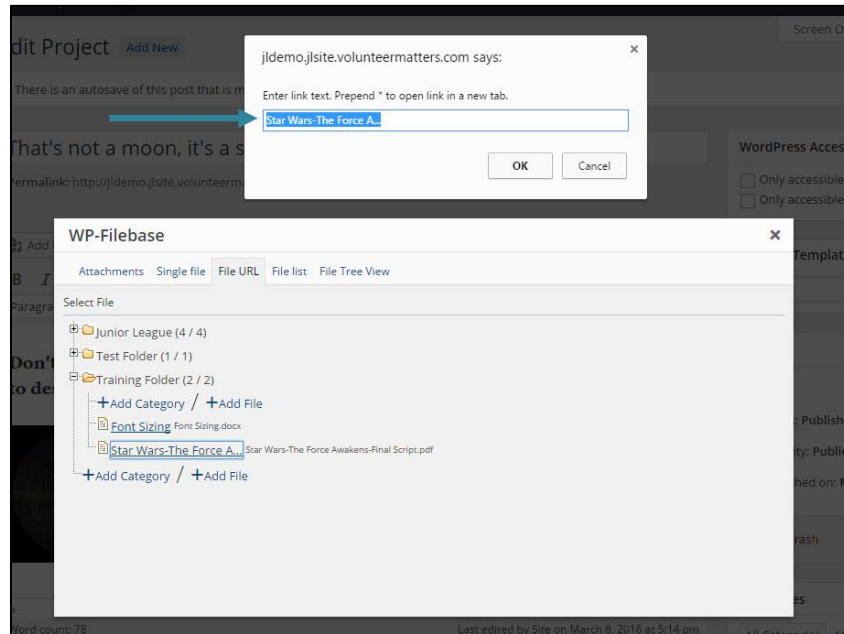


If you had previously highlighted text in your HTML editor to link from you will automatically be taken back to your content with your text replaced with the shortcode pointing to the file in question with your text set as the "linktext".



To modify the link text you will just need to update the text in the linktext section of the shortcode (between the single quotes).

If you had not previously highlighted text, after you click the file in the WP-Filebase Editor plugin interface on the "File URL" tab, a secondary window will appear where you can enter the text for the link.



It will include the text: "Enter link text. Prepend \* to open link in a new tab.". So if you want the file to open in a new window you will need to make sure to enter the \* as the first part of your text.

Once you click OK, you will automatically be taken back to your content with your text replaced with the shortcode pointing to the file in question with your text set as the "linktext". Then you can finish your changes and then click Publish (if new) or Update (if existing).

### **To add hyperlinks using the WYSIWYG Editor:**

A link is a word, group of words, or image that you can click on to go to a new page or a new section within the current page or an outside website.

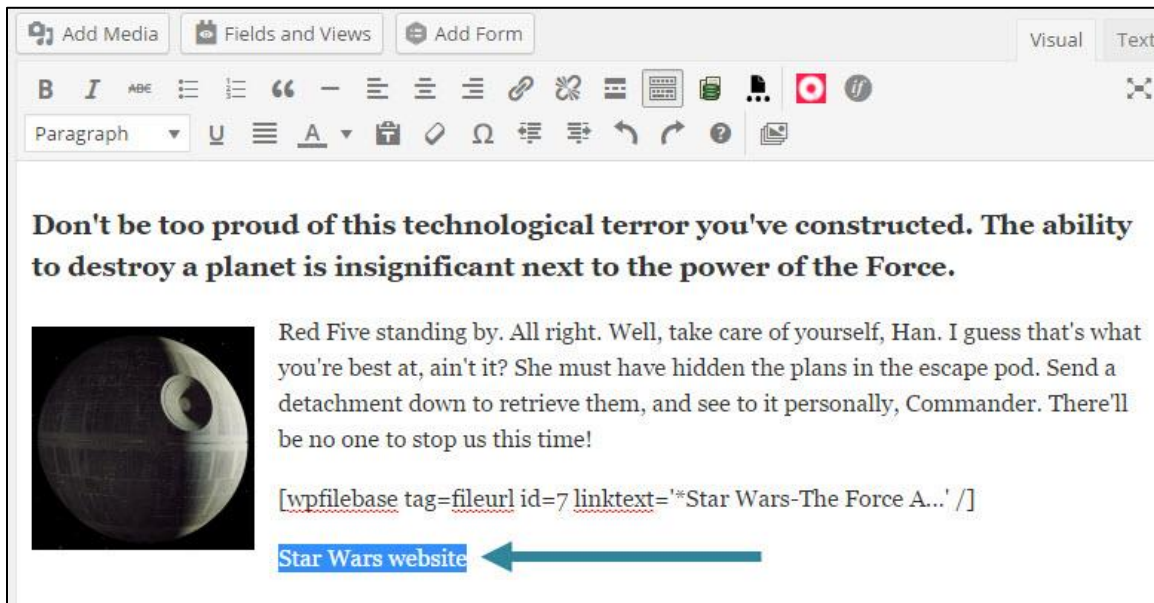
There are a couple of ways to add links to your content.

#### **Method One: Copy and Paste**

First, copy the URL you want to link to to your computer's clipboard. You can do this by highlighting a URL, then going to Edit → Copy in your browser's toolbar, or by using a keyboard shortcut like CTL-C (PC) or CMD-C (Mac).

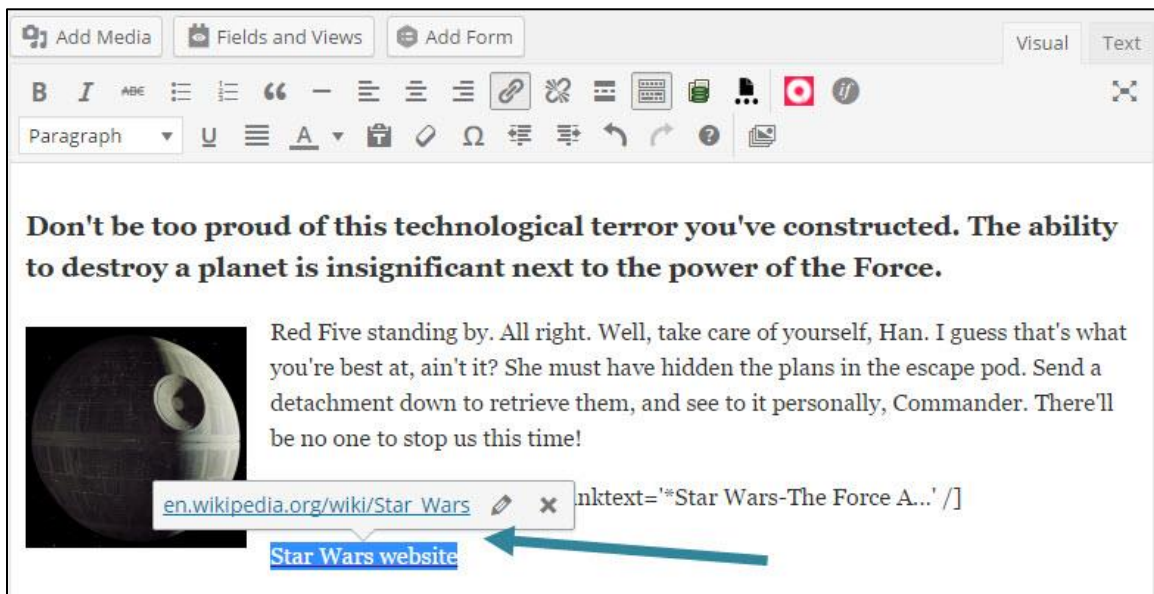


Next, highlight the text you want to link:



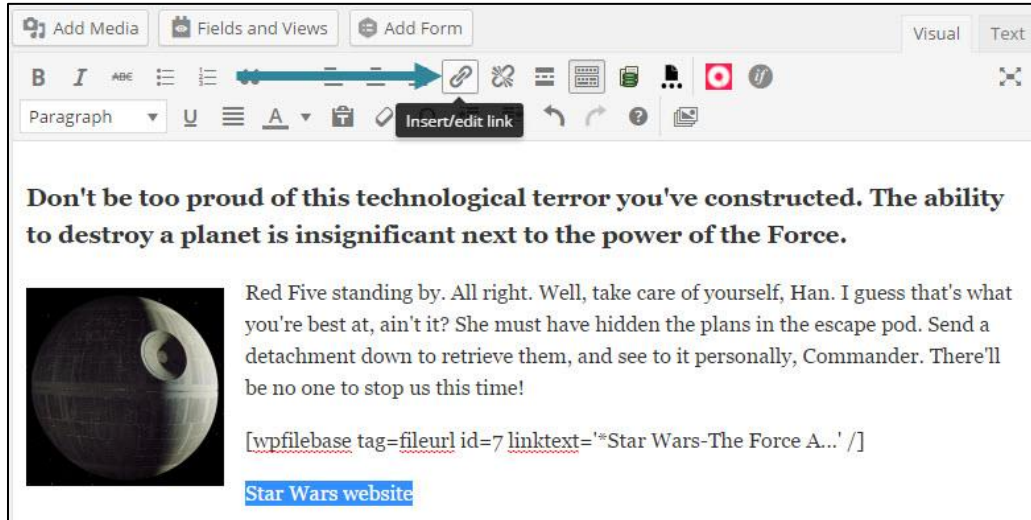
Finally, paste the URL you copied directly over the highlighted text. You can do this by keeping the text highlighted, then going to Edit → Paste in your browser's toolbar, or by using a keyboard shortcut like CTL-V (PC) or CMD-V (Mac).

WordPress will automatically create a link. The highlighted text will now appear underlined and blue to let you that it is linked:

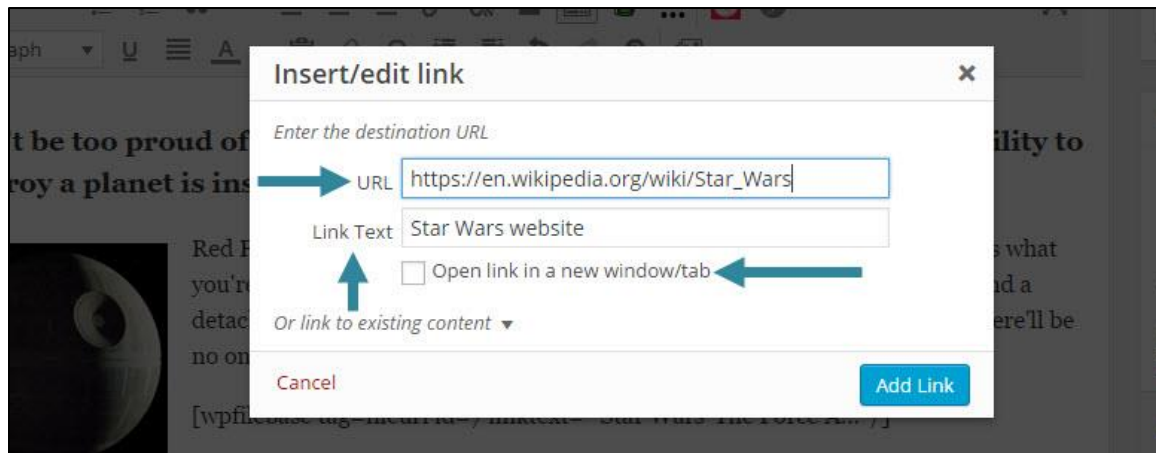


## Method Two: The Link Button

First, highlight the text or image you would like to associate with a link and click the "Insert/edit link" button.



This will open the "Insert/edit link" pop-up box: enter the URL you want to link to:



- **URL:** The URL of the link
- **Link Text:** If you highlighted text it will appear here. If you didn't highlight, you can enter the desired text.
- **Open link in a new window/tab:** If this box is checked clicking on your link will open up a new window/tab.

The click "Add Link" and you will be returned to your content and you can then update or publish your content.

For **URLs**, if this is a link to an outside website you will need to enter the full website link

into the URL, such as <http://www.volunteermatters.com>. Then check the box for the link to open in a new window/tab so the visitor will not be taken from your site.

If this is a link to a page within your website it is advisable to enter a 'Relative Link' into the URL field. For example the following is an absolute URL to a Closerware page:

<http://demo.volunteermatters.com/about-us>

The relative URL would be:

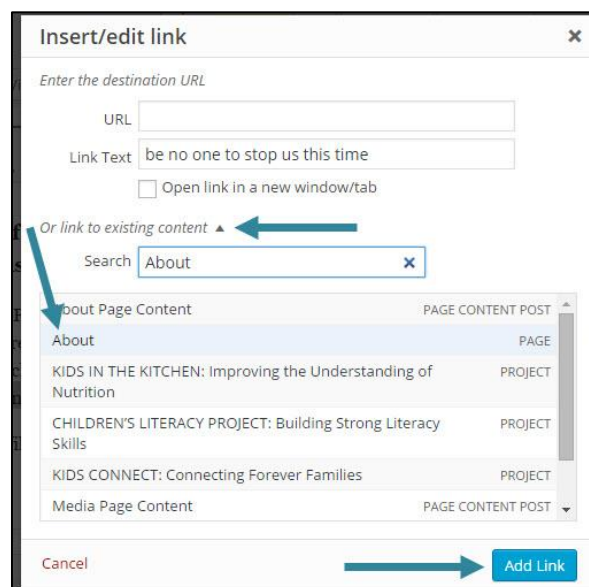
/about-us

You should leave the "open in a new window/tab" checkbox unchecked for relative links as it will allow the visitor to operate in the same original window.

When the relative path is inserted as the hyperlink's URL the website will automatically insert the base URL of the current webpage. To find the hyperlink for a page within your site, simply navigate to the appropriate page and copy everything from .com/.org/.edu/etc to the end of the URL.

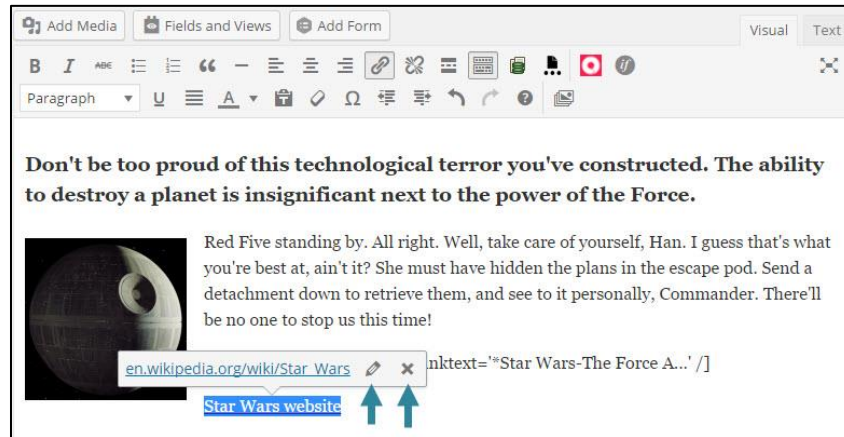
Another option while using the "Insert/edit link" button is to link to existing content which will automatically place the URL of the content in the URL box when you click on it. You may need to force the URL to be relative (if desired).

Make sure that you only link to Pages, One of the Custom Post types, Events, or Items only. **DO NOT LINK TO PAGE CONTENT elements.** You can use the search box to locate the elements in question.

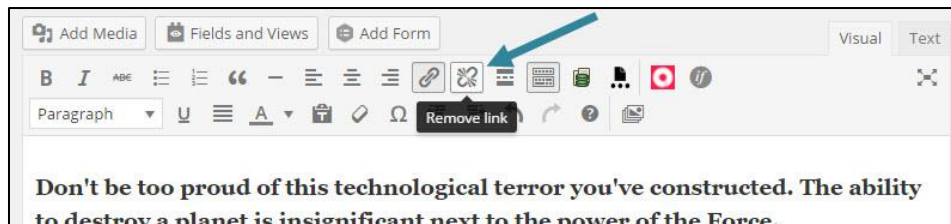


## Editing and Deleting Links

To edit or remove a link, place your cursor anywhere in the linked text. Then click the pencil icon to edit the link, or the X to remove the link:



You can also highlight the linked text and click the "Remove link" button in the toolbar.



For **Email links**, wordpress does not recommend creating email links because spammers often use scripts to scrape web sites looking for email addresses. If you create email links, you may see an increase in spam. They recommend using a contact form instead.

However if you do wish to create an email link, just type or paste the email address in the content, highlight the email address text and then click on the "Insert/edit link" button in the toolbar and in the pop-up box, the email URL will automatically be configured as needed. So you can then just click "Add Link".

