Site Overview

Your new site is built on ExpressionEngine (EE) – a powerful and secure publishing platform that enables you to manage your content from any computer with internet access. With EE as your content management system, you will easily be able to add new pages, entries and assets, and edit or manage this content with the ease of any simple word processing program.

ExpressionEngine General Concepts

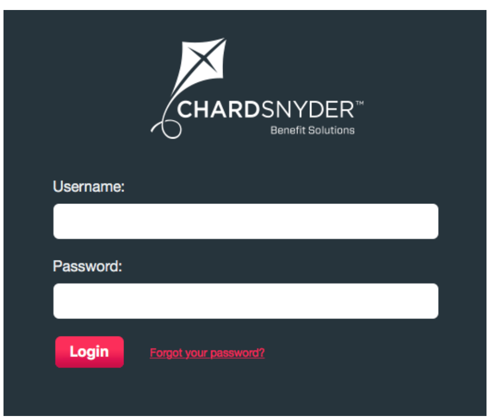
- **Publishing** is for new content
- **Editing** is for existing content
- The **File Manager** allows you access to all your site assets (images, PDFs, etc.)

Logging In

Control Panel Access

To access your control panel, visit **http://chard-snyder.asddev.com/manage**. Here, you will be presented with a login screen (see screenshot below). Enter your username and password to continue.

Note: If you ever forget or lose your password, just click the link and follow the instructions.



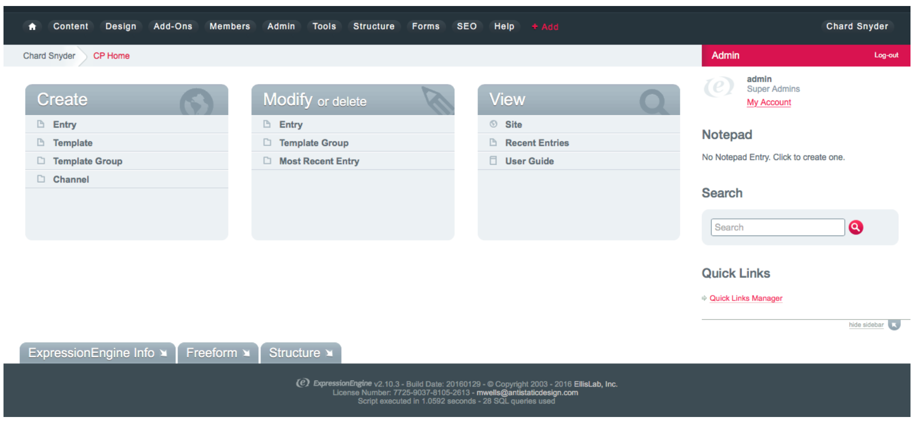
Your Login Information

Note: This user will be able to publish new content to the site, as well as edit existing content.

Username: admin
Password: pa$$w0rd

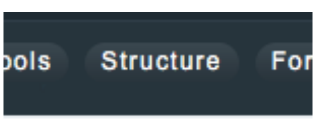
The Control Panel Home Page

After you log in, you will be at the home page of the control panel.

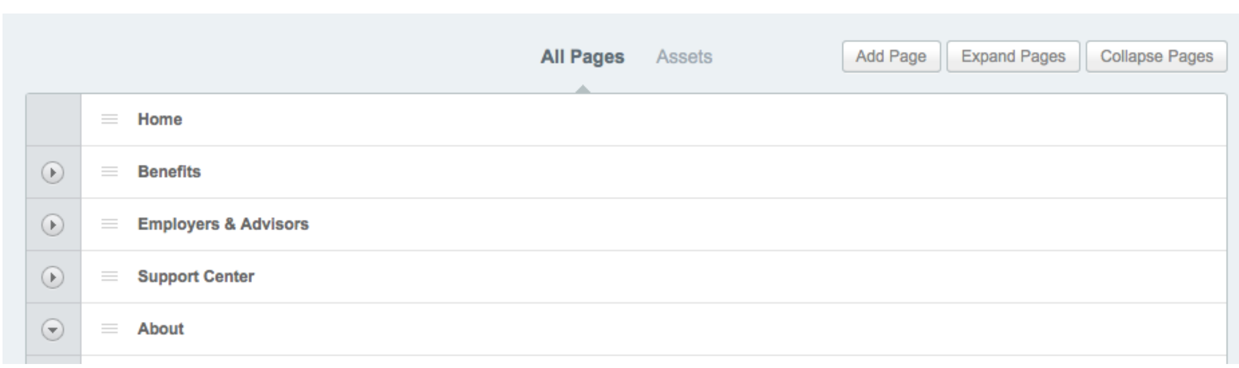


Publishing and Editing Content

To publish or edit content, click the ‘Structure’ tab at the top of the screen (Structure stands for the ‘Structure of your site’).



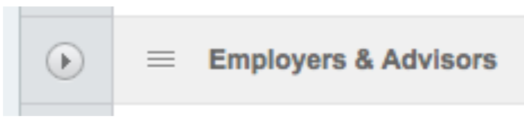
Once you are on the Structure screen you will see a number of pages listed, as well as some options at the top of the page listing:



- **All Pages:** This is where you will be able to view, edit and add pages to the site.
- **Assets:** This is where you will be able to add and edit other assets like Alerts or Advertisements, etc.
- **Add Page:** This will allow you to add a page at the root level of the site (ex: http://www.example.com/new-page-here).
- **Expand Pages:** This will expand all of the pages in the listing below.
- **Collapse Pages:** This will collapse all of the pages in the listing below.

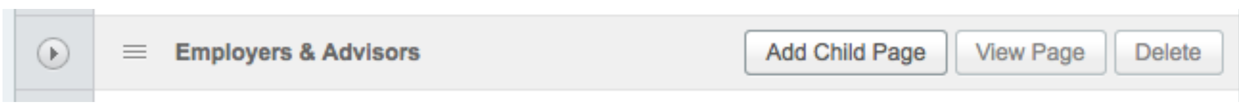
Structure allows you to easily manage “static” entries on the site, or, in other words, pages that don’t frequently change (ex: About page).

You can easily re-order navigation items by moving the mouse over to the left of the title and then clicking the gripper (three lines) and dragging the order of the item. Dragging pages outside or within other pages enables you to create parent or child navigation items.

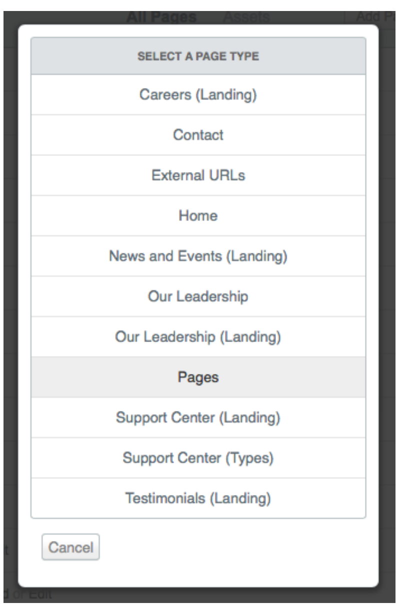


Publishing Entries

There are two ways to publish new entries within Structure. The first is to hover over the page that you would like your new page to appear beneath, and click **Add Child Page**:



When you click this, you will be asked to **Select a Page Type** that you would like to post.

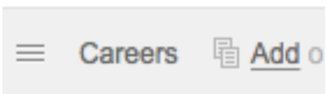


There will be multiple page types listed, but the main three to use within Structure are:

- **Pages:** This type is used to create the default pages in use through the site (ex: Benefits, Employers & Advisors, About, etc.).
- **Our Leadership:** This type is used to create individual bio entries for the Our Leadership section. Within Structure, you can then re-order the listing as needed.
- **External URLs:** This type is used to create external links that appear in the navigation (ex: FSA Store).

Once you have chosen your page type, you will be presented with the new entry form with fields for adding your content.

For items like Careers, News & Events and Testimonials, click on “Add” next to their name. This will take you to a new entry form for the chosen page type.



Entry Fields

The following are a few of the content field types in use throughout the site.

TITLES

As soon as you publish a new page, the first thing you’ll usually do is give the entry a title. The title is very important, as it is what you will use not only to recognize the entry within ExpressionEngine, but it is usually the headline or title of the page displayed on the front-end of the site. It also is often used in the title tags which appear at the top of your browser window when on that page.

URL TITLE

URL Titles get dynamically created as you type in the Title field. URL Titles are all lowercase and spaces appear as dashes or underscores. URL Titles will appear within the URL bar in the browser and can be useful to users (ex: within the URL, www.chard-snyder.com/about/news-and-events/my-new-article/ the segment “my-new-article” would be the URL Title).

CUSTOM FIELDS

Depending on the type of entry being published, a series of unique custom fields have been created along with the Title and URL Title fields. These custom fields come in a variety of forms, such as checkboxes, file upload buttons, drop downs, or simple text input fields. The purpose of these fields are usually self-evident or are described by the fields title and/or description directly within ExpressionEngine.

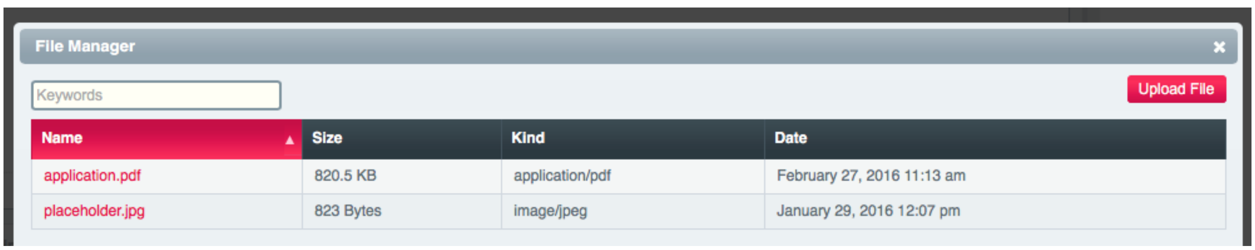
CONTENT EDITOR

The content editor in ExpressionEngine is a “WYSIWYG” editor (what you see is what you get). In other words, when you format text within the editor, it hides the HTML from you so you only see the formatting and no code. This can save time and is easier for non-technical administrators.

The following are just a few examples of buttons available within the editor that you may use to format your text: Bold, Italics, Underline, Ordered and Unordered Lists, Links, Images and Tables.

PLACING IMAGES AND PDF FILES IN THEIR OWN CUSTOM FIELD

If there is a file field set up, you can add a file (image or PDF) to the entry. Click on “Add File” and it will bring up the File Manager.

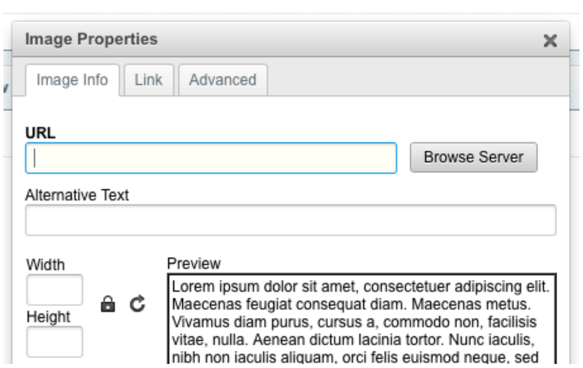


Files that have been previously uploaded will display in a listing. Clicking on the name of the file will add it to the field.

To upload a new file, click ‘Upload File’ in the upper-right portion of the dialog box and then select a file from your computer. After the file has successfully been uploaded, you will have the option to edit it, or return to the publish view with the file added to that field.

PLACING IMAGES AND PDF FILES WITHIN TEXT FIELDS

When you click on the image icon within the WYSIWYG content editor, it will open up a modal window which will ask for a URL to the file. Choosing ‘Browse Server’ will allow you to select a previously uploaded file or upload a new one.

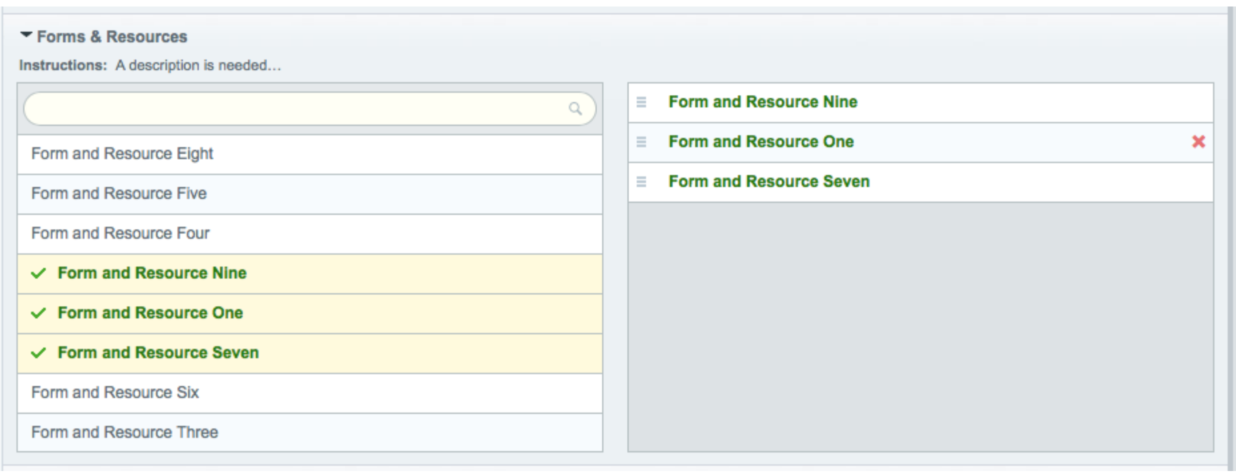


There are a few additional options you can customize before adding the image to your content:

- **Alternative Text:** This field adds descriptive text that appears if a user can't see the image.
- **Alignment:** Allows text to flow around the left or right side of the image (if the image is small enough).
- **Link:** Under the link tab, you can link the image to another page or site by typing in a URL.

MULTI-RELATIONSHIPS

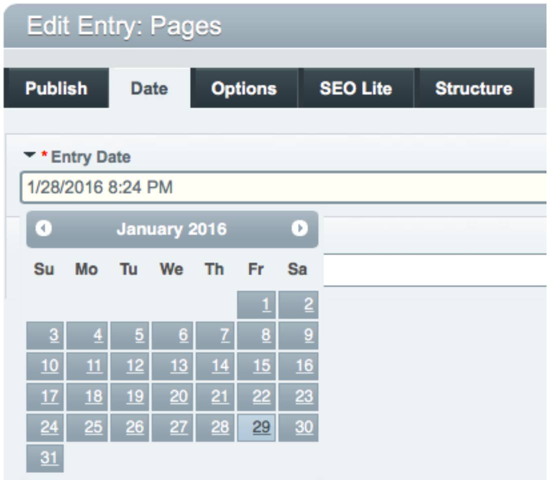
There are a few relationship entry fields in use. An example would be the Common Questions and Forms & Resources blocks that appear in the Benefits section. On the entry form, these will appear as two window panes (left and right). The left will show all available entries. To display any of those entries on the current entry your editing, click on one or more in the left window. Active entries will begin to appear on the right pane, with the ability to re-order by drag and drop. To remove an entry from the right pane, hover over the item and click the red 'X' on the right side.



DATE

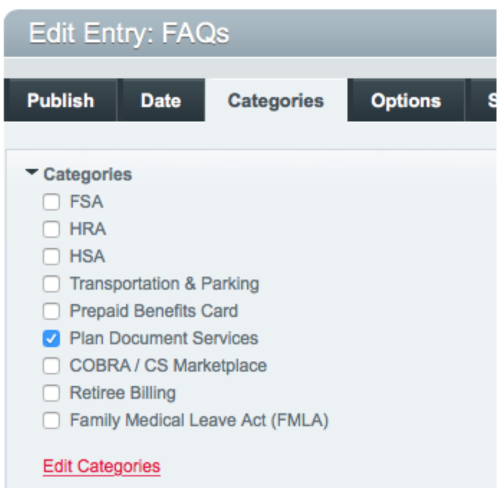
All entries are associated with a date by default. When you create a new entry, it's date is automatically set to the day and time you created it. You can change this date by clicking anywhere within the entry date field, which will bring up a calendar for easy picking. Changing a date may be useful if you want to make a post appear older than it is (if dates are displayed on the front-end. Optionally, you can post-date entries by selecting a date in the future. Future entries do not appear on the front-end for users until that date arrives.

You can optionally set an expiration date, if you want the entry to be unpublished from the site at a certain time in the future, and if your site has comments, you can set comments to be removed for that entry on a given date.



CATEGORIES

Categories are a great way to organize entries so that users on the front-end can filter to show entries that match a specific category. To assign a category to a specific entry, click on the categories tab (if this is enabled for the channel) when editing the entry. You will see a list of existing categories. To assign the entry to one or more, simply check off the appropriate boxes and save the entry.



If you'd like to edit the available list, click on the Edit Categories link. This will show an edit view of the categories and allow you to re-order them using the arrows, edit, or delete.

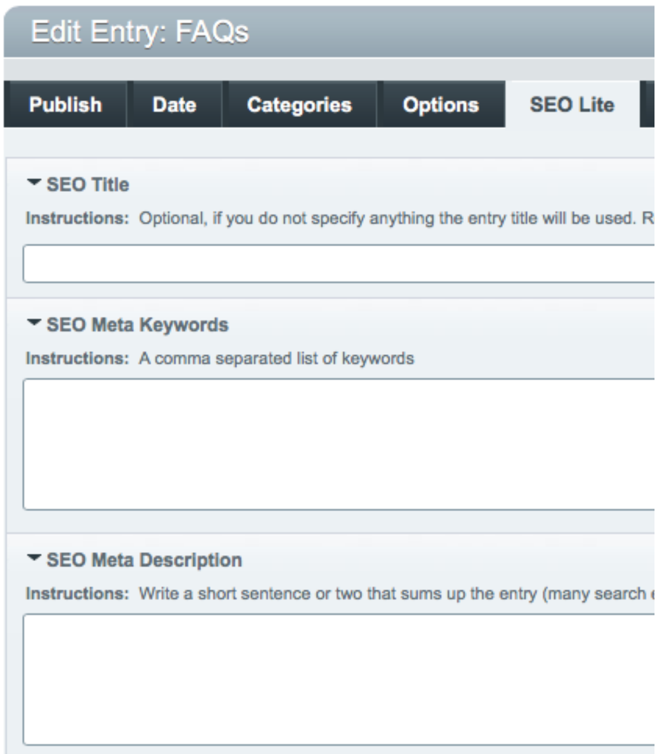
You can add a new category by clicking the "Add Category" link below the table and to the right. This will open a modal window and will require a category name, and any other applicable fields (all except Name are optional). You can optionally nest categories within parent groups by choosing an existing category. Click submit when you are done.

Once the modal window closes and if you are done editing the category list, click Done. Then check off the appropriate category and save your entry.

SEO LITE

Your site also has the ability to be optimized for search engines like Google, Yahoo! and Bing. Each page or entry of the site has the ability to optimize title, keywords and description for the page.

Note: Entries/Assets that do not display the SEO data on the site will not have this tab.



SEO Lite is a module that lets you change title and meta data associated with your entry. SEO stands for Search Engine Optimization, and carefully choosing appropriate words and phrases to put within these fields can assist in getting the webpage to rank higher in search engines.

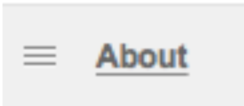
By default, most pages title tags will show the name that you've given the entry. However if you'd like to override the default setting and instead choose your own customized page title, type it under the Title field within the SEO Lite tab.

You can also write Meta Keywords (a comma separated list of keywords), and a Meta Description (a short sentence or two that sums up the entry).

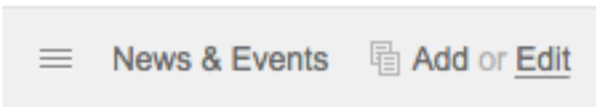
When ready to publish, click 'Submit' at the bottom right of the page.

Editing Existing Entries

There are two ways to edit entries within Structure. The first is to hover over the page that you would like to edit and click name of it.



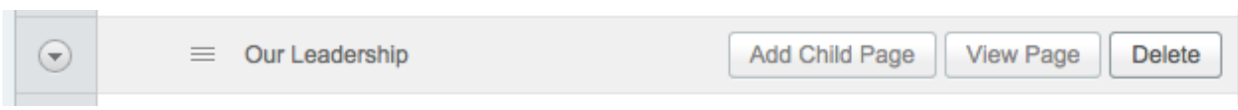
For items like Careers, News & Events and Testimonials, click on “Edit” next to their name. This will take you to a list view of all entries for the particular entry type chosen.



Clicking on the entry title will take you to the edit form where you can change the content for that entry.

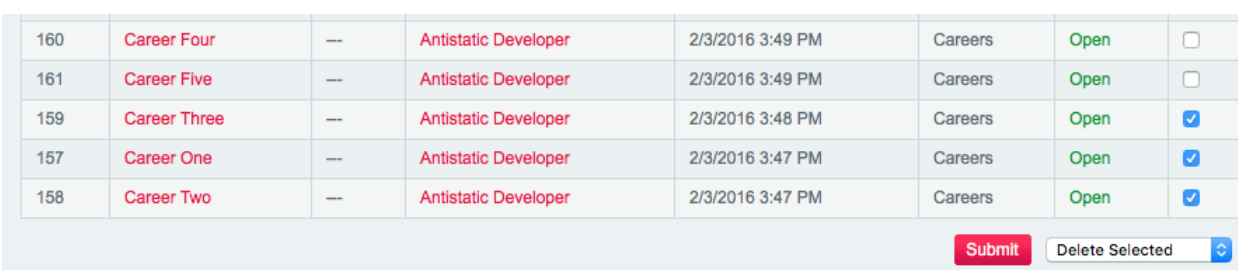
Deleting Entries

There are two ways to delete entries within Structure. The first is to hover over the page that you would like to edit and click the name of it.



For items like Careers, News & Events and Testimonials, click on “Edit” next to their name. This will take you to a list view of all entries for the particular entry type chosen.

If you’d like to delete one or more entries, click on the check box next to the entry you want to delete. You can click on multiple checkboxes to delete multiple entries.

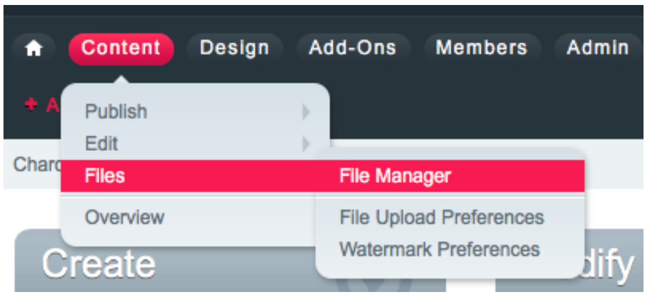


160	Career Four	---	Antistatic Developer	2/3/2016 3:49 PM	Careers	Open	☐
161	Career Five	---	Antistatic Developer	2/3/2016 3:49 PM	Careers	Open	☐
159	Career Three	---	Antistatic Developer	2/3/2016 3:48 PM	Careers	Open	☑
157	Career One	---	Antistatic Developer	2/3/2016 3:47 PM	Careers	Open	☑
158	Career Two	---	Antistatic Developer	2/3/2016 3:47 PM	Careers	Open	☑

Once the entries are checked, choose ‘Delete Selected’ from the drop down menu at the bottom of the page, then click Submit.

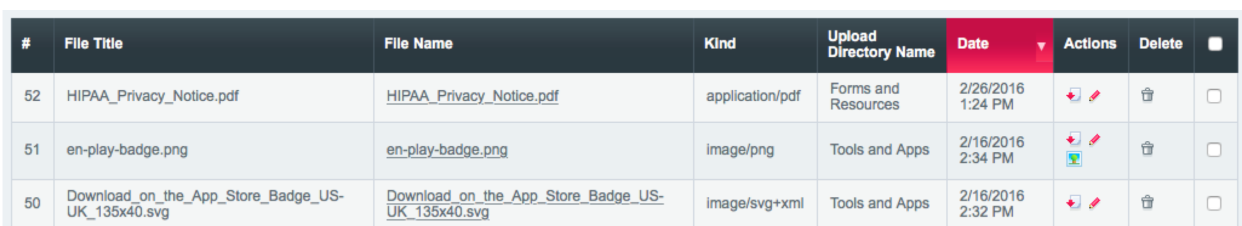
File Manager

The file manager is where you can upload new files to the site, as well as edit and manage current files that have been uploaded to the site. You can access the file manager via the ‘Content’ tab in the upper left hand of the screen.



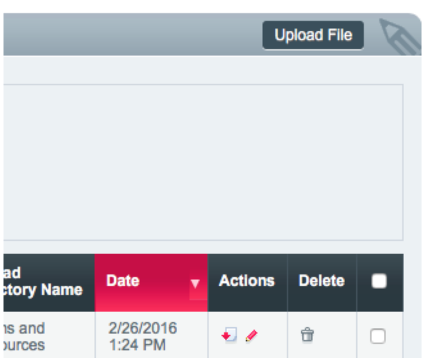
Directories

While in the File Manager, you will see a list of files. Click on the name of the file to see a preview (images only). Click on the download icon to download the file to your computer, or click on the garbage icon to delete the file. To delete more than one file at a time, select them using the checkboxes and click Delete Selected Files button at the bottom of the window.



#	File Title	File Name	Kind	Upload Directory Name	Date	Actions	Delete	
52	HIPAA_Privacy_Notice.pdf	HIPAA_Privacy_Notice.pdf	application/pdf	Forms and Resources	2/26/2016 1:24 PM			
51	en-play-badge.png	en-play-badge.png	image/png	Tools and Apps	2/16/2016 2:34 PM			
50	Download_on_the_App_Store_Badge_US-UK_135x40.svg	Download_on_the_App_Store_Badge_US-UK_135x40.svg	image/svg+xml	Tools and Apps	2/16/2016 2:32 PM			

To upload a new file to the server, click on File Upload in the right sidebar, and then browse to locate the appropriate file on your computer.



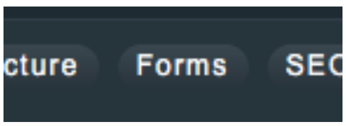
Viewing Files (Sorting)

To sort files, click on the table heading above each column. For example, to sort the files alphabetically by name, click on the File Name heading in the left column. You'll notice the order of the rows change. You can sort by file size, file type (Kind) and Date.

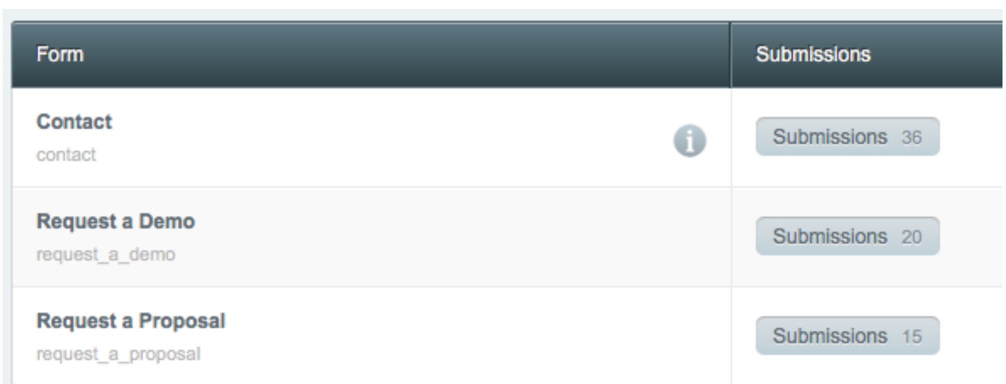
Form Entries

Entries

Along with receiving notifications of form submissions by email, each submission is also stored on the content management system. To view form submissions posted to Request a Demo, Request a Proposal and Contact, click the Forms tab at the top of the screen.



Once in the Forms section, click on the 'Submissions' button (to the right of each form name) next to the form you would like to see submissions for.



This will then display a list view of all submissions for the selected form, with options to export, edit or delete entries.