Portal Agency Training Manual

Editors Guide

Drupal 7 – GeorgiaGov Platform

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Support: For further assistance, fill out a Support Request at http://portal.georgia.gov/support

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1.0 Overview

The Drupal 7 Content Management System (CMS) for the GeorgiaGov Portal is the central management console you'll use to edit and manage your agency's website. Content management is an integrated online system designed to help you minimize the time for coding, providing a consistent look and feel by using standardized templates, and updating or creating content in real time. The entire content process happens within a web browser– from collection and production to delivery and analysis.

The Drupal 7 CMS makes it easy for you and other designated employees to control your own Web content, regardless of technical experience.

Note: the Drupal 7 CMS for the GeorgiaGov Platform is a highly customized version of Drupal 7, and provides many features and functions that are not standard on out-of-the-box Drupal websites.

1.1 System Requirements

To get the most out of the Drupal 7 CMS, we recommend using a modern web browser such as **Mozilla's Firefox**. (http://getfirefox.com). This browser is available for PC and Macintosh computers.

If you do not have the appropriate permissions to install Firefox on your work PC, you can also use **Internet Explorer 9**. (Please note that key functionality may not be supported in Internet Explorer 8).

1.2 Terminology

Absolute URL – a link that is formatted with a full web path, e.g. http://georgia.gov/education.

Alternative (or Alternate) Text – a sentence that describes what's happening in a graphic or photograph. Search engines and screen readers display alternative text for site visitors who have visual impairments.

Block – a placeholder for content on a page, also known as a content area.

Box – a feature that is placed inside of a content area on a page (Page Elements)

Categories - the Master "tag" list for content on the GeorgiaGov Platform. This list is filled with high level categories that can define any content item.

Content Area – a placeholder for content on a page

Content Item – a piece of content that typically corresponds to a single page on your agency's site and includes a title, an optional body and other customized fields. In Drupal, developers also refer to content items as **nodes**.

Content Type – the formatting and fields for a type of content item, such as blog posts, photo galleries, and press releases.

Menu – a place to organize your content so that users can find it. The Navigation Menu is your primary menu for this.

Node – Drupal term for any Content item.

Relative URL – a link that is formatted with a partial web path and points to content on your agency's site. On the GeorgiaGov website (http://georgia.gov), for example, the relative URL "/education" points to http://georgia.gov/education.

Template - the layout and presentation display that your information "fits" into.

2.0 Getting Started

2.1 Logging In

To log into the CMS,

1. Navigate to **YOURSITE.georgia.gov/user** (e.g., gbi.georgia.gov/user)
2. Enter the username and password assigned to you.

2.2 Requesting a New Password

If you ever forget your password,

1. Navigate to **YOURSITE.georgia.gov/user** and select the "Request New Password" link.
2. Enter your e-mail address for the system (typically your work email) to receive an email with instructions on how to reset your password.

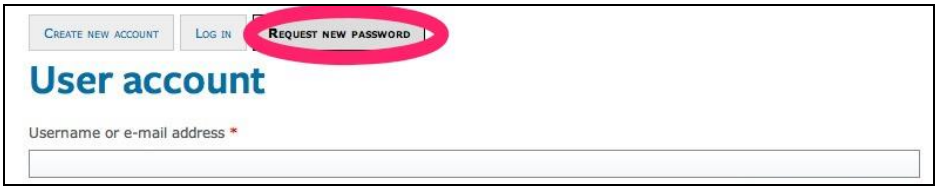


Figure 1 Request new password

2.3 The Admin Toolbar

When you are logged into the system, you will see an administrative toolbar across the top of the screen.

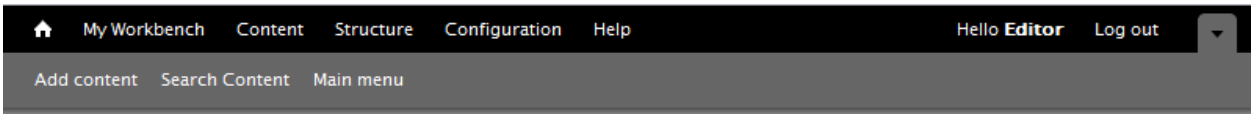


Figure 2 Editor's toolbar

This common system toolbar contains the following items along the top (in the black bar):

- **My Workbench:** Use this special dashboard, which provides search tools and content listings, to access your content.
- **Content**: Add and search for content.
- **Structure:** Access site blocks (content areas) and menus.
- **Configuration:** Access platform settings for blocks (content areas) and menus.
- **Help**: Unless you're working on advanced configuration, you won't use this section. If you have a question about how to create content, use the pop-up help text in the content creation forms.

- **Hello <Current User>:** See your account options and settings.
- **Log out:** Sign out of your session when you are done working with the system.

Beneath the admin toolbar, you will see a lighter gray "Shortcut" bar with shortcuts to the most common tasks you'll need to perform on the site:

- **Add Content:** See a list of the content types you can add, such as Site Pages and Press Releases.
- **Search Content:** Target your search by title, or look for particular phrases within the content; use this when you need to locate a specific piece of content to edit.
- **Main Menu:** Access the Navigation menu, where you can re-order, add, edit, or delete items from the navigation menu.

2.4 Content Manager Roles

There are two main Content manager account types available. All agency websites will have at least one content manager assigned to the Editor role, with an option to assign other Editors and Creators. Creators have limited abilities and are meant to be able to draft new content for an Editor's review.

Some of the tasks in this manual will not be available to Creators, but all are available to Editors. Below is a general checklist for each role.

	Create Content	Edit Content	Save Draft	Save as Needs Review	Publish Content	Schedule Content	Manage Menus	Manage Homepage	Create Webforms
Creator	X	X	X	X					
Editor	X	X	X	X	X	X	X	X	X

3.0 Creating Content

The GeorgiaGov Drupal Platform offers a number of content types designed to provide flexibility *and* structure to your website. To begin adding new content to your website,

1. From the admin toolbar's shortcut area, click "Add content."

2. From the "Add content" screen, choose the type of content item you want to create.
   The following content types are available to all agency websites:

Content Type	Purpose
Blog Entry	Posts a single article for a site-wide blog.
Document	Stores a file or series of related files, such as PDFs or Word Documents.
Event	Stores information on a single event, to be displayed in an Events list or calendar view.
Index List	Provides a detailed list of links that reference other pieces of content. Also used to create an FAQ page. *(Similar to a list of Teasers in Vignette)*
Photo Gallery	Displays a collection of photos within a gallery.
Press Release	Posts a traditional "press release" of text content that will populate a site-wide Press Releases list.
Profile	Contains biographical information about a user; this user may be an author, a staff member, or even an organization.
Services	A description of a specific service that the organization or agency provides to site users (such as "tax preparation" or "grant programs").
Site Page	A simple page of content used for infrequently updated information. *(Similar to an Article in Vignette)*
Video	Embeds video from a third-party vendor, and formats it for your site. *(We recommend you host your videos on another service, such as YouTube or Vimeo, and use this content type to embed that video.)*

3. After selecting a content type, you will fill out a form for that content. The information you enter will change based on the content type you select.
   a. **Required** fields are marked with a red asterisk.
   b. The bottom of the form always has two options for new content: Meta Tags and Revision Information.
4. When complete, select "Save" to save your content.

3.1 Blog

Blog entries can be an excellent way to inform visitors about ongoing news or bulletins. The blog feature also allows site visitors to subscribe to its RSS feed in web browsers (e.g., Internet Explorer, Firefox), and dedicated applications (e.g., Feedly, Newsgator).

- **Title:** Add a unique title to the blog post.
- **Author**: If the Blog has an Author, you can link it to an existing "Profile" content type to provide more information about that author. If your Release has multiple authors, you can select **Add Another Item** to add more author fields.
    - If an author profile does not exist, you can create one on the fly by pressing the green **Add** icon.
    - To update an existing profile, type the name of the profile and select the **Pencil** icon.
- **Body:** Enter the content of the Blog in the body field. The WYSIWYG Editor allows you to apply special text treatments.
- **Categories:** To tag an item, begin typing a term, and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.
- **Topics:** These are freeform tags that you can apply to a blog post. This is an autocomplete field, so you may begin to type a tag and find its match in the system, or you may add a new tag that is specific to your blog and will be reused for similar posts.

> ***Note***: Once a topic is created, it is added to a Taxonomy of blog terms. A visitor can use these terms to view all blog posts tagged with a specific Topic. Once a Topic has been created, deleting its blog post does not delete the topic – only a Taxonomy Manager can remove a Topic that is no longer relevant.

- **Structured Image:** Upload an image that should accompany the blog post. *This image will be full-width across the page on any device, so it should be at least 900px wide, and a panoramic image.*
    - **Structured Image Caption:** will display below the image
    - **Alternate Text:** field appears after you upload an image. It is important to include a description of the image for screen readers and Google image searches.
    - **Title:** field appears after you upload an image. This is the text that will appear when a person hovers their mouse over the image.
- **Related Files:** You may upload files related to the blog content. These files appear at the bottom of the page with a special treatment. These can be links to content in the system or anything on the internet. The Related Files field can have multiple files in it. To add a file (txt, doc, docx, pdf, ppt,pptx, vsd, xls, xlsx):
    - Select **Choose File**, and select a file using your system's built in file browser.
    - Select **Upload**.
    - Add a file description. If you do not add a description, the filename will be used.
    - If desired, select **Choose File** again to upload another file.

3.2 Documents

The Document content type can be used for posting many file types, including PDF, Word, Excel, PowerPoint, and Visio files. This can be a useful way to collect either a single document, like a PDF, or a set of related documents with their respective meta-data. Some example use cases:

- Create a document content item for a PDF Pamphlet to feature on the homepage
- Create a document content item for a commonly referenced Word document
- Create a document content type for notes from a specific meeting, "Budget Meeting Minutes"

Documents have the following fields with them:

- **Title:** The unique title of the document
- **Description:** A description of the content of the file(s). This can be used to summarize content or include a plain text alternative to the attached file.

- **Publication Date:** The publication date is the official date of the document (not for the file attachments, but for the post). This date is used for display, so that the official time of the document (rather than when it was published or updated) is what is shown to site visitors. This is set to the creation date by default, and only optionally needs to be updated.

- **Document Type:** Document type is a way to categorize documents on your site. By default, this list lets you select Form or Publication, but this list can be customized for your website. Some document types you could add might include: Meeting Minutes, Briefs, Pamphlets, and Informational Sheets. Select the pre-specified type from the dropdown. *(To customize your list, contact the GeorgiaGov Interactive team or your agency's Taxonomy Manager)*.

- **Categories:** To tag an item, begin typing a term, and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

- **Topics:** A free-tagging system for documents. This is additional meta-data and is completely optional. This is an autocomplete field, so you may begin to type a tag and find its match in the system, or you may add a new tag that is specific to your document and will be reused for similar documents.

> ***Note***: Once a topic is created, it is added to a Taxonomy of document terms. Once a Topic has been created, deleting its document does not delete the topic – only a Taxonomy Manager can remove a Topic that is no longer relevant.

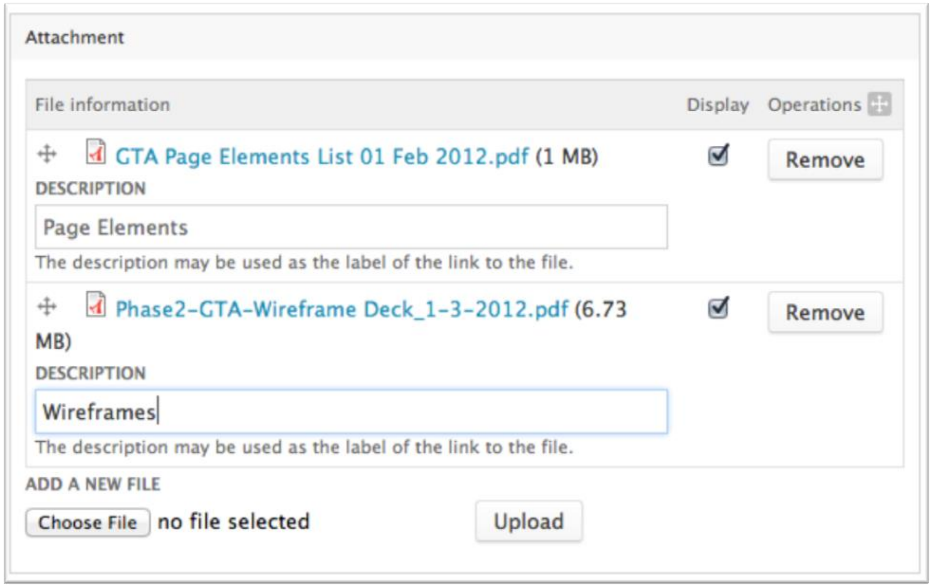


Figure 3 Attachments on a document content type with multiple attachments

- **Attachments:** This is where you actually attach your files. You may attach one or multiple files to the Document. To add a file (txt, doc, docx, pdf, ppt, pptx, vsd, xls, xlsx):
    - Select **Choose File**.
    - Select a file using your system's built in file browser.
    - Select **Upload**.
    - Add a file description. If you do not add a description, the filename will be used.
    - If needed, select **Choose File** again to upload another file.

> ***Note***: If you upload a file with the same filename as another file on the system, the new one will overwrite the old file.

The Document Content Type, once published, can be used throughout the site.

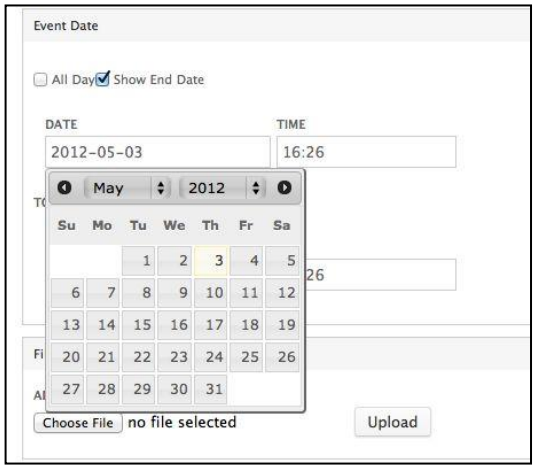
3.3 Events

The event planning function promotes upcoming events and displays these in special lists throughout the site. (You can still view past events, but these won't be promoted. Your events page will display "No Upcoming Events" when you do not have any events to promote).

- **Title:** Add a unique title to the event.

- **Description:** Write a description of the event.

- **Event Date:** Set your event as partial-day, all-day or multi-day.
    - For an all-day event, check the **All Day** checkbox, and enter in the desired date using the Date picker.
    - For an event spanning several hours or several days, check the **Show End Date** checkbox, and enter in the desired date, start time and end time.
    - For a date spanning several days with no set start and end times, check both the **All Day** checkbox and the **Show End Date** checkbox.



- **Attachments:** The attachments field can have multiple attachments in it. To add a file (txt, doc, pdf, ppt, xls, xlsx):
    - Select **Choose File**.
    - Select a file using your system's built in file browser.
    - Select **Upload**.
    - Add a file description. If you do not add a description, the filename will be used.
    - If desired, select **Choose File** again to upload another file.

- **Thumbnail Image:** The thumbnail only appears if the event is promoted to a featured event.
  To add a thumbnail image:
    - Select **Choose File**.
    - Select a file using your system's built-in file browser.
    - Select **Upload**.
    - Enter some descriptive Alternate Text.

- **Location:** Enter in the country, address, city, state, and zip code of the event. This location information will appear on the event detail page, and the location will also show in a Google map that is embedded on the page.

3.4 Index List

An Index List is a special, sortable table of items that allows you to create and curate lists of links and FAQs, among others. An Index List can be used in two ways - as a stand-alone page on the site, or as a list that can be inserted into another document.

You can use an Index List to create:

- An FAQ list
- A glossary or an encyclopedic listing
- A list of forms
- A table of contents for a section of the site
- A page of resources linking to external websites

In order to create an Index List, enter the following information:

- **Title:** A unique title for the Index List.

- **Description:** An *optional* description of the list. If this list will be used by itself, you may want to provide some introductory information. If the list is to be embedded, leave this description blank.

- **Structured Image:** Upload an image that should accompany the site page. *This image will be full-width across the page on any device, so it should be at least 900px wide, and a panoramic image.*
    - **Structured Image Caption:** will display below the image
    - **Alternate Text:** field appears after you upload an image. It is important to include a description of the image for screen readers and Google image searches.
    - **Title:** field appears after you upload an image. This is the text that will appear when a person hovers their mouse over the image.

- **Categories:** To tag an item, begin typing a term, and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

- **Formatter for Detailed Links** sets the display formatting of the list.

Figure 4 Formatter for index Lists

- **Display as regular list** shows the link item and description. It presents two settings that you SHOULD NOT change.
    - *Use the same configuration as the widget* (not applicable)
    - *Format Handlers* (not applicable)

- **Display as alphabetical index by title** alphabetizes the items in the list and provides an optional alphabetic (A to Z) list of jump links (useful for very large lists):
    - **Show index jump links:** Shows the A to Z links for the list
    - **Show index breakpoints:** If you check the A to Z links, you should also check the breakpoints. This will display the letters within the list.
    - **Show "Back to Top" links**: Inserts "Back to Top" links throughout the list after each letter grouping.

- **Display as links DataTable (title, URL)** enables a sortable table of items. The table contains two columns, the first column is a link with label and the second column provides a description. *For more details, see "Creating a DataTable."*

- **Display as FAQ List:** Very similar to an alphabetical list, but it displays a jump list of titles to each list item at the top of the page. *For more details, see* Creating an FAQ Page http://portal.georgia.gov/interactive/training-video-creating-faq-page-index-list

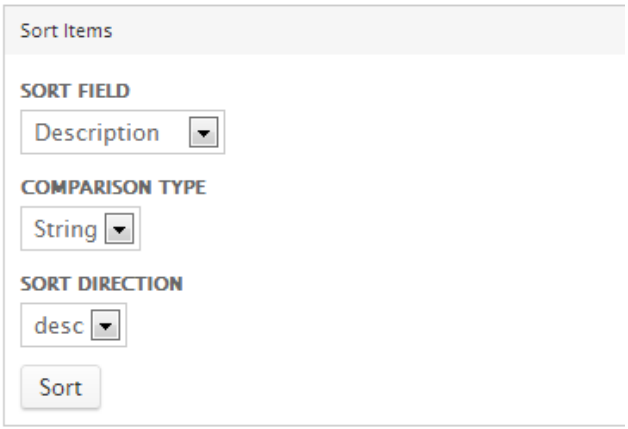


Figure 5 Index List Sort Items

- **Sort Items**: If your link list is made up of similar items in a **Regular List** view, you can adjust their sort order after the list of links has been created. Set the **Sort Field**, **Comparison Type** and **Sort Direction**, and click **Sort** to see the Detailed Links below auto-sorted.

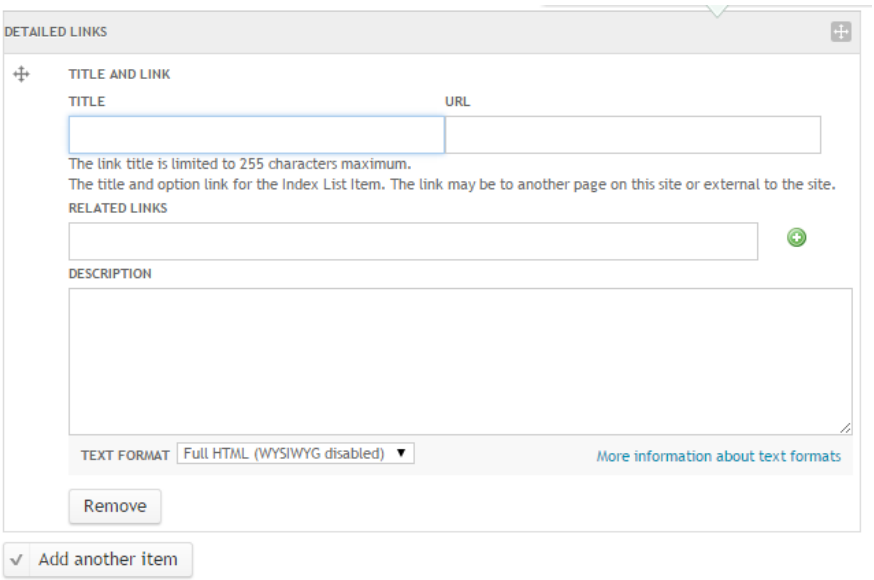


Figure 6 Index List detailed links field

- **Detailed Links:** This is the main content of the Index List. You will need to add one or more items to create a list:
  - **Title** is the title for the list item.
  - **URL** is the target for the list item.
  - **Related Content**: Use in place of a Title and URL to link to content within the site. Begin typing the title for the content, and an autocomplete list will pop up to help you select the right piece of content. *If specified, this will override the URL field and the Title.*
  - **Description**: Add text for the item, such as a FAQ's answer or a description of the link.
  - **Add Another Item:** Add another Detailed Link to the list**.**

Once you've created a list of links, you may use the Sort Items fields to automatically sort the list, or manually order the list using the handle drag-icons next to each Detailed Link to order them. (**Note:** If you chose the alphabetized list, you *will not* have to order the Detailed Links. The list will automatically alphabetize for site visitors.

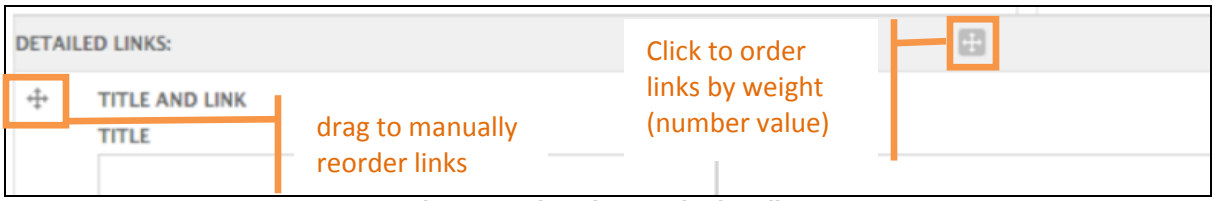
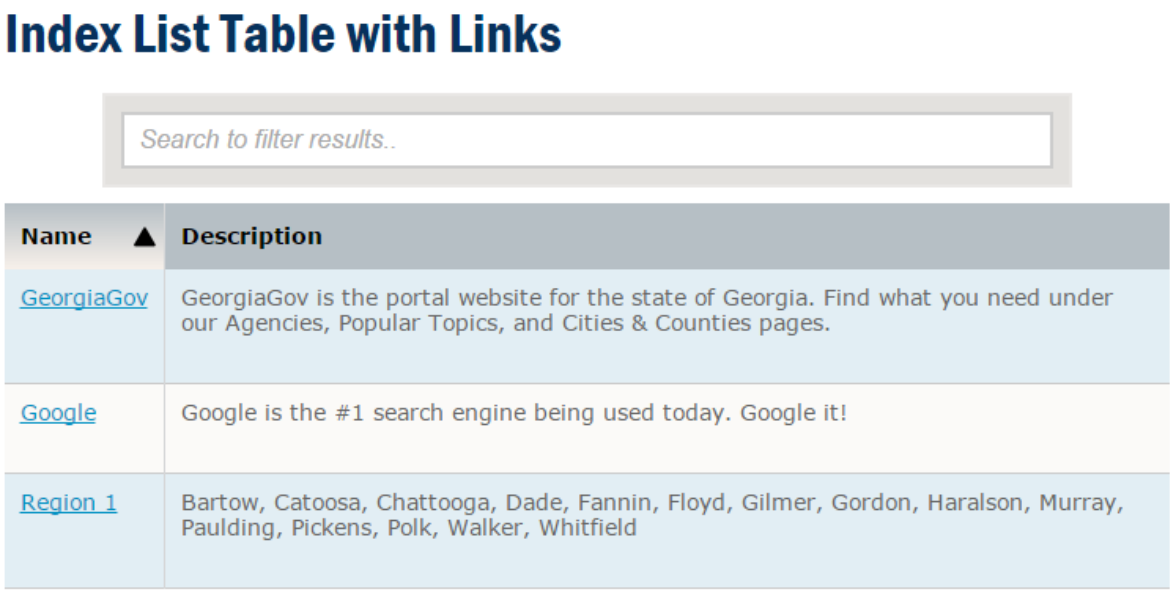


Figure 7 Index List reorder handles

- **Parent Reference** allows you to identify a "Parent" web page that links to this item. Selecting a Parent Reference page results in the left-hand navigation from the Parent page showing on this page as well. You won't need to set a Parent Reference if you're placing the Index List in a menu.

3.4.1 Creating a DataTable

Within the Index List content type, there is an option to create a DataTable. The DataTable enables a sortable table of items. The table contains two columns, the first column is a link with label and the second column provides a description.



Index List Table with Links

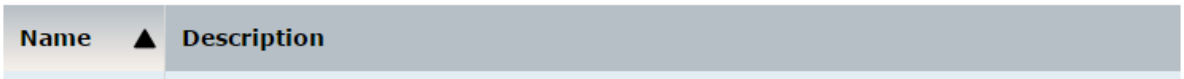
Search to filter results..

Name ▲	Description
GeorgiaGov	GeorgiaGov is the portal website for the state of Georgia. Find what you need under our Agencies, Popular Topics, and Cities & Counties pages.
Google	Google is the #1 search engine being used today. Google it!
Region 1	Bartow, Catoosa, Chattooga, Dade, Fannin, Floyd, Gilmer, Gordon, Haralson, Murray, Paulding, Pickens, Polk, Walker, Whitfield

To create a DataTable, start by going to **Add Content** > **Index List**

- **Title:** A unique title for the index List.
- **Description:** An *optional* description of the list. If this list will be used by itself, you may want to provide some introductory information. If the list is to be embedded, leave this description blank.
- **Structured Image:** Upload an image that should accompany the site page. *This image will be full-width across the page on any device, so it should be at least 900px wide, and a panoramic image.*
    - **Structured Image Caption:** will display below the image
    - **Alternate Text:** field appears after you upload an image. It is important to include a description of the image for screen readers and Google image searches.
    - **Title:** field appears after you upload an image. This is the text that will appear when a person hovers their mouse over the image.
- **Categories:** To tag an item, begin typing a term, and the autocomplete list will begin listing items.
    - You may select multiple items by placing commas between them.

- **Formatter for Detailed Links** sets the display formatting of the list.
    - Choose **"Display as links DataTable (title, URL)"**
    - Type the text you want to show in the header row for the table under **Text for "Name" Column in Table** and **Text for "Description" Column in Table**

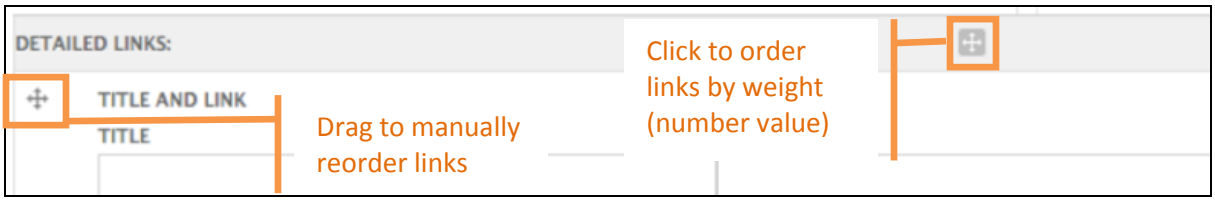


Example of table heading formatting

- The **Sort Items** selection will allow you to sort any Related Links you've already added below. It is only useful after you've already created some Related Links, and you want to sort them based on one of their fields.
    - **Sort Field:** Allows the choice of sorting the data by field
    - **Comparison Type:** Choose to compare the items by string or date
    - **Sort Direction:** Choose to display in ascending or descending order

- **Detailed Links:** This is the main content of the Index List. You will need to add one or more items to create a list:
    - **Title** is the title for the list item.
    - **URL** is the target for the list item.
    - **Related Links**: Can be used in place of a Title and URL to link to content within the site. Begin typing the title for the content, and an autocomplete list will pop up to help you select the right piece of content. *If specified, this will override the URL field above..*
    - **Description**: Add text for the item, such as a FAQ's answer or a description of the link.
    - **Add Another Item:** Add another Detailed Link to the list**.**

Once you've created a list of links, you may use the **Sort Items** fields to automatically sort the list, or manually order the list using the handle drag-icons next to each Detailed Link to order them. (**Note:** If you chose the alphabetized list, you *will not* have to order the Detailed Links. The list will automatically alphabetize for site visitors.)



- **Parent Reference:** allows you to identify a “Parent” web page that links to this item. Selecting a Parent Reference page results in the left-hand navigation from the Parent page showing on this page as well. You won’t need to set a Parent Reference if you’re placing the Index List in a menu.
- **Provide a menu link:** Click to include your content into the menu, and choose its location by the drop down Parent Item box.

3.5 Photo Gallery

To display a collection of photos in a gallery format, you can create a Photo Gallery.

- **Title:** A unique title for the Photo Gallery
- **Description:** An *optional* description of the photo gallery
- **Key Image:** This image will represent the gallery on the media listing page
    - To add a new image from your computer:
        - Select Choose File, and select a file using your system's built-in file browser.
        - Select Upload.
        - Enter some descriptive Alternative Text.
    - To add an image already in the system:
        - Select **File Browser**.
        - Select **Browse** next to **No file selected**.
        - Find your image in the File Browser, click on it and click on **Insert File**.
- **Gallery Items:** The gallery items are the photos that appear in the photo gallery.
    - To add a new image from your computer:
        - Select Choose File, and select a file using your system's built-in file browser.

> ***Note***: If you upload a file with the same filename as another file on the system, this one will overwrite the other file.

        - Select Upload.
        - Enter some descriptive Alternative Text.
    - To add an image already in the system:
        - Select **File Browser**.
        - Select **Browse** next to **No file selected**.
        - Find your image in the File Browser, click on it and click on **Insert File**.
    - Enter a title so users can see this description when they hover over the image.
    - Enter a Caption that will accompany the image.
    - To add more Gallery Items, click **Add Another Item** and repeat the steps.

> ***Note:*** you must add the Key Image as a Gallery Item as well if you want that image to show in the gallery.

- **Categories:** To tag an item, begin typing a term and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

> ***Note:*** When published, a list of Photo Galleries will appear at **YOURSITE.georgia.gov/media** and at **YOURSITE.georgia.gov/media/photo-galleries** in chronological order, with the most recent at the top of the list.

3.6 Press Releases

Press Releases allow you to share your agency's latest news with the public. An RSS Feed will automatically generate for Press Release content. When published, a list of Press Releases will appear at **YOURSITE.georgia.gov/press-releases** in chronological order, with the most recent at the top of the list.

- **Title**: Enter a unique title for your Press Release.
- **Body:** Enter the content of the Press Release in the body field. The WYSIWYG Editor allows you to apply special text treatments.
- **Summary:** If you want to control the contents of the Summary that shows up on the main Press Releases page, click **Edit Summary** and insert a short summary in the field that appears. (Leave blank for an automatically generated summary).
- **Author**: If the Press Release has an Author, you can link it to an existing "Profile" content type to provide more information about that author. If your Release has multiple authors, you can select **Add Another Item** to add more author fields.
    - If an author profile does not exist, you can create one on the fly by pressing the green **Add** icon.
    - To update an existing profile, type the name of the profile and select the **Pencil** icon.
- **Related Files:** You can attach files to supplement a Press Release.
- **Release Date:** The release date is the official date of the Press Release. This date is used for display, so that the official time of the release (rather than when it was published or updated) is what is shown to site visitors. Press Releases will also be ordered on the page by this date.
- **Contact Information:** Who the media should contact for more information on the release.
- **Header:** If your agency uses custom press release headers, select the appropriate one here. *Not used on most agency websites.*
- **News Release Type:** If your agency has more than one press release section, select the appropriate news release type here. *Not used on most agency websites*.
- **Categories:** To tag an item, begin typing a term and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

3.7 Profile

Profiles are used to create entries and biographies for important staff members or blog authors. You can use a series of Profiles for a page listing all the Staff and/or Leadership of an agency. A Blog or Press Release can also reference a Profile for the content's author.

Note: Instructions on organizing your profiles into sub pages and adding taxonomy terms are located in the Advanced Training Manual, Section 4.0.

- **First Name** and **Last Name:** The first name and last name of the individual whose profile you are creating.
- **Full Name** is automatically created by combining the first name and last name fields as you type.
- **Image:** This image field is intended to be used for an image of the author or staff member.
    - To add a new image from your computer:
        - Select Choose File.
        - Select a file using your system's built-in file browser.

        Note: If you upload a file with the same filename as another file on the system, this one will overwrite the other file.

        - Select Upload.
        - Enter some descriptive Alternative Text.
    - To add an image already in the system:
        - Select **File Browser**.
        - Select **Browse** next to **No file selected**.
        - Find your image in the File Browser, click on it and click on **Insert File**.
- **Job Title**: Enter the job title of the author or staff member.
- **Organization:** Enter the organization the author or staff member works for.
- **Department:** Enter the department the author or staff member works in.
- **Staff Member:** Leave blank.
- **Leadership:** Leave blank.
- **Biography:** Enter the user's biography. The WYSIWYG Editor will allow you to apply special text treatments.
- **Email Address:** Enter the email address of the author or staff member.
- **Phone Number:** Enter the phone number of the author or staff member.
- **Social Media:** Enter the social media addresses for the author or staff member. These social media addresses should be the entire web address of the profile (e.g. http://www.facebook.com/georgiagov). These social media web addresses will appear on the user's profile as clickable links.
- **Address:** Enter the country, address, city, state, and zip code where the user can be reached.
- **Staff Type:** Choose from the dropdown list of staff types to add this Profile to a category page. *(See Advanced Training Manual for details on adding staff types)*

3.8 Site Page

Site pages are used for static content such as About Us and agency information pages.

- **Title:** Enter a unique title for the page.
- **Body:** Use this field to type the main content of the Site Page. The WYSIWYG Editor allows you to format the text, add links and images, etc. (*See Appendix B for further instructions*).
- **Structured Image:** Upload an image that should accompany the site page. *This image will be full-width across the page on any device, so it should be at least 900px wide, and a panoramic image.*
    - **Structured Image Caption:** will display below the image
    - **Alternate Text:** field appears after you upload an image. *It is important to include a description of the image for screen readers and Google image searches*.
    - **Title:** field appears after you upload an image. This is the text that will appear when a person hovers their mouse over the image.

- **Related Links:** You may place any number of links in the body of the page, and you may also create special links that appear at the bottom of the page with a special treatment. These can be links to content in the system or anything on the internet.

    - For a link to an external URL:
        - Enter the **Title** and the **absolute URL** for the link. *Leave the Related Content field blank.*

    - For a link to an internal URL, either:
        - Enter the **Title** and the **relative URL** for the link. (e.g., when referencing internal PDFs.)
        - Start typing the title of the content into the **Related Content** field, and the system will present possible matches.

          *Note: If you select some **Related Content**, you should leave the **URL** or the **Title** fields blank. You can, optionally, enter a new Title to override the normal title for the content.*

    - Optionally, enter a description of the link for people to see on the site.

    - To add more links, select **Add Another Item** and repeat the process.

Figure 8 Related Links Sort Items

- **Sort Items**: If your link list is made up of similar items, you can adjust their sort order after the list of links has been created. You will find the Sort Items area ABOVE the Related Links section. Set the **Sort Field**, **Comparison Type** and **Sort Direction**, and click Sort to see the Detailed Links below auto-sorted.

- **Related Files:** These are used to attach files specifically to this piece of content, and they will appear at the very bottom of the page as special downloads. Typically, you'll use this for external files that relate to the web content.
    - To add a file, select **Choose File**, and use your system's file browser to find an item.
    - Select **Upload**.
    - Finally, you may enter an optional **Description** to be used as the display title for the document. If you enter nothing, the filename will be used.

- **Categories:** To tag an item, begin typing a term, and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

- **Parent Reference** allows you to identify a "Parent" web page that links to this item. Selecting a Parent Reference page results in the left-hand navigation from the Parent page showing on this page as well. You won't need to set a Parent Reference if you're placing the Site Page in a menu.

- **Meta Tags**: Meta tags help Search Engines better understand your content; these terms are not displayed to users, but can be useful in increasing Search Engine rankings.
    - **Description –** This is the most important item for search engines and should be filled in for each piece of content. Delete the default text and replace it with a short description of your content, including key descriptor words where appropriate.
    - **Keywords** should be a few of the most important words reflected in your content. Some keywords will be pre-populated from the Categories field, but more can be added here.
    - **Title** is typically automatically correct, and should be left as-is.

  Beneath the fields for Meta Tags is a catalog of special "tokens." These are variables that can insert automatic content, like the date the content was published, into the keyword fields. Typically, you will not need to add tokens, and the handwritten descriptions and keywords you chose to add will be more valuable data for search engine optimization (SEO) purposes.

- **Revision Information:** Revision information allows you to add notes about what you are changing in the content when you save it (under Revisions Log), as well as to publish or schedule publishing directly from the content item. For this example, we recommend leaving the content in "Draft" form to Save and preview your page.

3.9 Videos

To show videos on your agency website, you can upload them to a YouTube or Vimeo account, and then embed the videos on your site. The Video content type allows you to do that easily without code.

- **Title:** Select a unique title for the Video.
- **Description:** Add an optional description. This will show below the video on the Video Listing page, as well as in full on the video's Detail page.
- **Video URL:** Copy and paste the video's URL from YouTube or Vimeo.
- **Thumbnail Image:** A thumbnail automatically appears on the video's landing page, but you can also replace the thumbnail with another image you prefer. To add a thumbnail image:
    - Select **Choose File**.
    - Select a file using your system's built-in file browser.
    - Select **Upload**.
- **Categories:** To tag an item, begin typing a term and the autocomplete list will begin listing items. You must select a category from the existing list.
    - You may select multiple items by placing commas between them.

Note: When you save and publish the video, you may not see the video publish while you are logged in (depending on your browser's settings and whether or not it will show external content from secure pages). To see your video on the page, log out and make sure your URL starts with **http:** NOT **https:**

Apply Your Knowledge: Exercises

Complete **Exercises 1-5** in your Editor's Guide: *Exercises* manual.

4.0 Managing Content

4.1 Draft and Page Views while logged in

When you are logged into the system to view content, please note that the main content area of the pages may appear smaller, and the right rail floating towards the left. This only shows when logged in; when you are logged out the right rail will float to the right, and the main content area will fill the space.

Figure 9 Page view while logged in

Similarly, Draft content shows with a pink background that will not show when the content has been Published to the live website.

Figure 10 Draft content with pink background

4.2 Publishing Content

After you create or edit a content item, you will click Save to save the work as a Draft. Then you can review the Draft page and confirm that it looks as expected. From there you will see Moderation buttons above the page title, and Workflow settings in a yellow box below the page title.

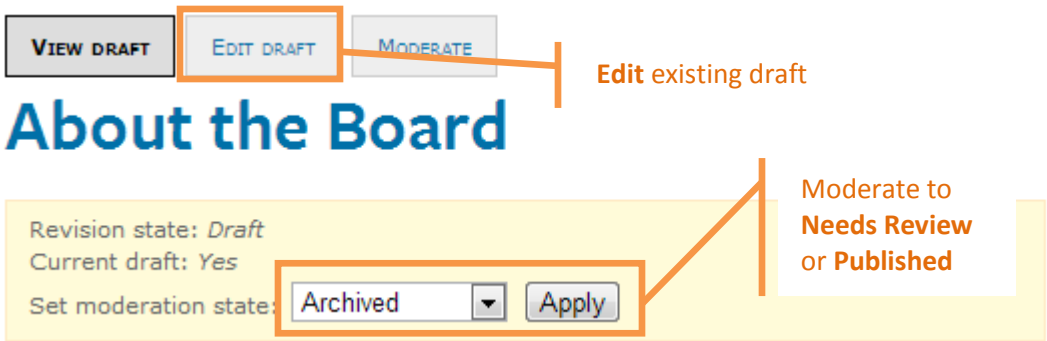


Figure 11 Moderation and Workflow settings

- **To make changes** to this Draft, click **Edit Draft** to return to the Edit screen.
- To set this version to Needs Review (so an Editor can review it), change the Workflow to **Needs Review** and click **Apply**. (You will need to tell your Editor that there is content available for their review.)
- To set this version as the Published version, change the Workflow to **Published** and click **Apply**.
- Once you've published a piece of content, your Moderation buttons will change slightly. You will see the following buttons depending on the state of your content item:
    - **View Published**: To view the published version of a content item. This shows when you are working on a new draft; if this is brand new content, no published version will be available.
    - **View Draft:** To view an in-progress draft. This button will not appear if there is no draft.
    - **New Draft:** To make changes to the Published version of the content.
    - **Edit Draft:** To edit a draft that is in progress.
    - **Moderate:** To see the revision history of a piece of content.

4.3 Searching for Content

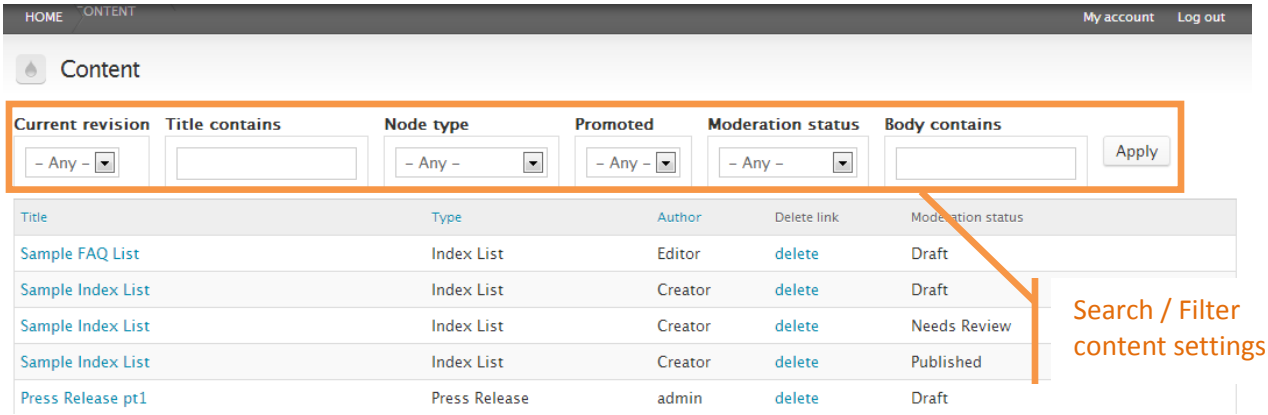


Figure 12 Search Content screen

To find an existing piece of content on the system, you can use the "Search Content" feature.

- **Current revision**:
  Any (shows all versions),
  Yes (shows current version),
  No (shows old versions)
- **Title contains**: search by part of the title text
- **Node type**: select to view a list of a single content type
- *Promoted: Not used*
- **Moderation status**: select to view Draft, Archived, Published, or Needs Review content
- **Body contains:** Search by text within the body

Select as many or as few settings as needed to find your desired content, then click "Apply" to run the search and filter commands.

*Tip: To see all new Drafts that haven't been published, set "Current revision" to **Yes** and "Moderation Status" to **Draft**, then click Apply.*

4.4 Moderate and Review Content

If you have users on your system who have the role of Creator, they can create and edit content, but they cannot Publish their own content. Creators will set their content to Needs Review, and a user with the role of Editor will need to publish any content set to Needs Review.

If you are the Editor who will be publishing content, you will use the My Workbench panel to see all content that needs to be reviewed and published.

1. Select "My Workbench" from the Admin Toolbar.

Figure 13 The Workbench dashboard

2. Select the **Needs Review** tab from the upper right of the Workbench Dashboard

Figure 14 Needs Review tab

3. All content that has been submitted for review will appear here. The "Needs Review" dashboard presents search functions similar to Search Content. You can search by title and type to see what content needs to be published.
4. Click the Title of the content item to review it.

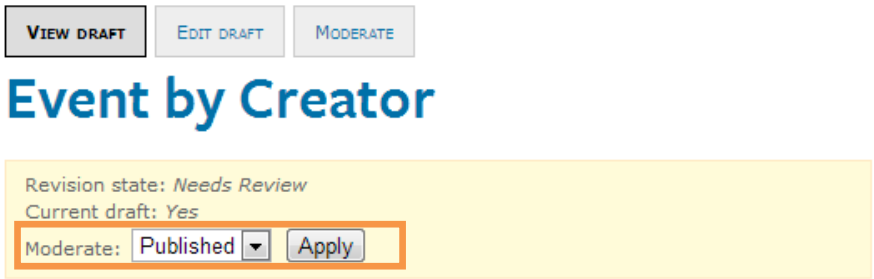


Figure 15 Moderate Needs Review Content

5. After review, if the content is ready to be published, Click the **Apply** button to moderate to Published. Alternatively, click the **Edit Draft** button to make changes before publishing.

4.5 Publishing Content and Scheduling Content on Creation

If you are an Editor, you can also change the publication status and schedule publishing at the bottom of each content item's editing page, under "Revision information."

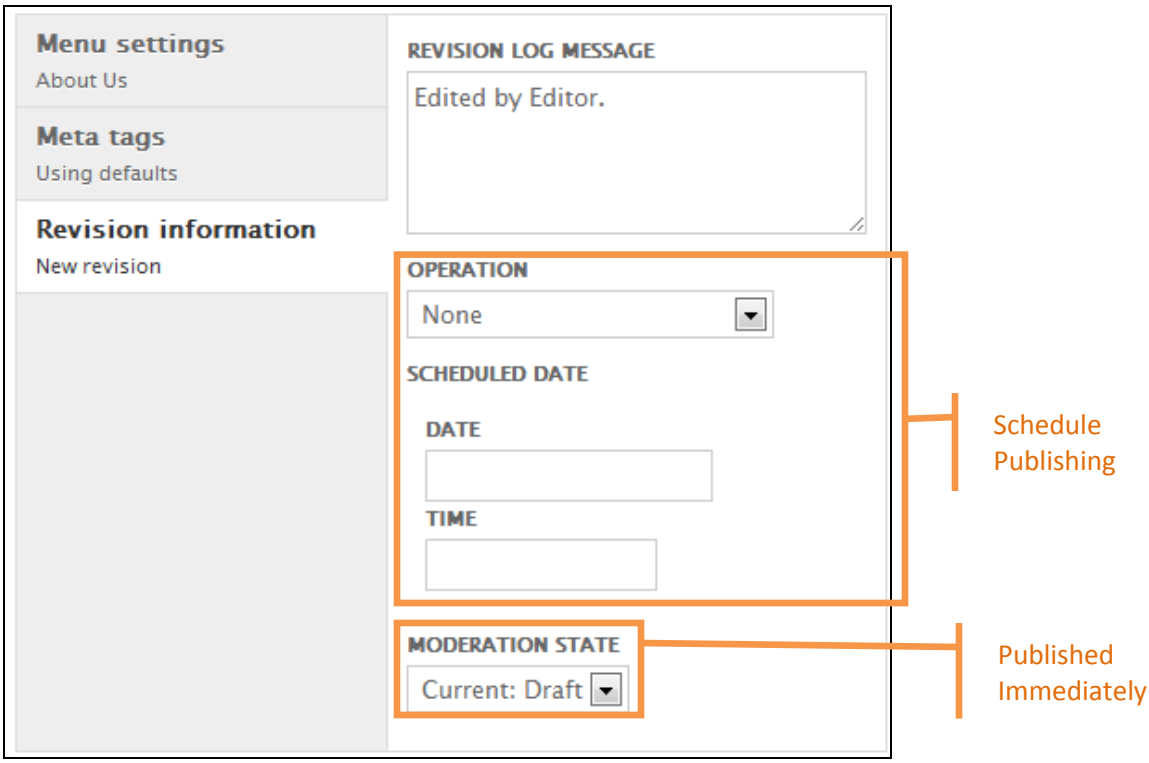


Figure 16 Publishing and Scheduling options with moderation state and notes

To **Publish** a piece of content,

1. From the "Moderation State" dropdown box, select **Published**. Click Save to save the content item and publish it.

To **Schedule** a piece of content,

2. From the "Operation" drop-down menu, select the desired workflow state (such as **Moderate to Published**). Under Scheduled Date, type in the date and time the content should change state (e.g. the time and date to publish or archive the content). Use the tooltips that appear to format your date and time correctly.

4.6 Scheduling Content in Detail

For a more detailed scheduling, such as scheduling a revision of a page (or a new draft) to be published,

1. After you've created and saved a piece of content, click the "Moderate" tab.

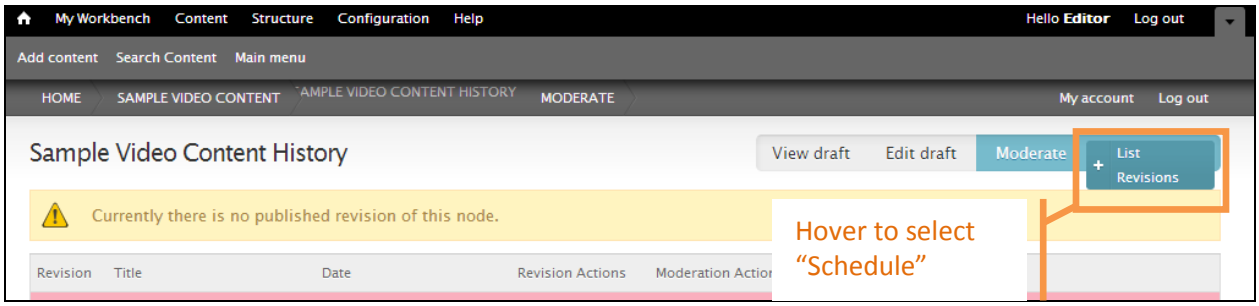


Figure 17 Scheduling a Content Item

2. In the Moderate tab, select **List** > **Schedule**.

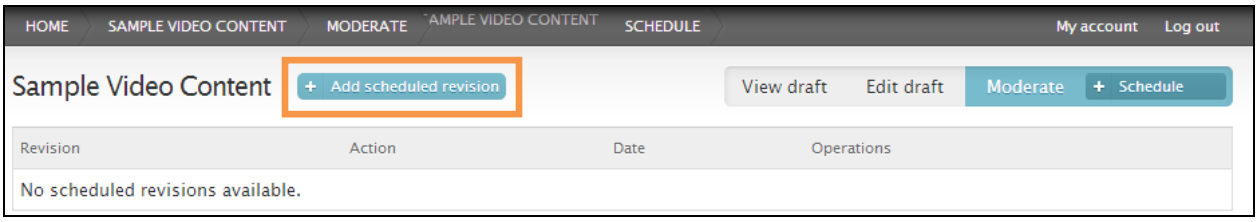


Figure 18 Scheduling a Content Item

3. Next to the title, select **Add Scheduled Revision**.

4. On the Scheduling screen, select the revision, action, and time for the scheduled change.
   a. **Revision** is the version of the content to act on (normally the most recent).
   b. **Operation** will allow you to revert, delete, or publish content.
   c. **Scheduled Date** can be set with a day using a calendar picker and a time (you must insert a time in the format hh:mm, using military time).
5. Click **Schedule** to save your settings.

Your content will update at the scheduled time.

4.7 Archiving / Unpublishing Content

When you no longer want a piece of content to show on your website, you can either **Delete** it or **Unpublish** it.

If you **Delete** a content item, it will be gone from the system, and you will not be able to retrieve it. This is a good choice for test content or otherwise unusable content.

If you would like to keep the content in the system for reference but don't want it to show on the website, you can **Unpublish** the item. When a piece of content has been **Unpublished**, it will show up in the system as **Archived**.

To **Unpublish** a content item,

1. Find the content item on the website. If you are logged in as an Editor, you will see a yellow box just below the title with an available Action to **Unpublish this revision**.

2. Select **Unpublish this revision**.

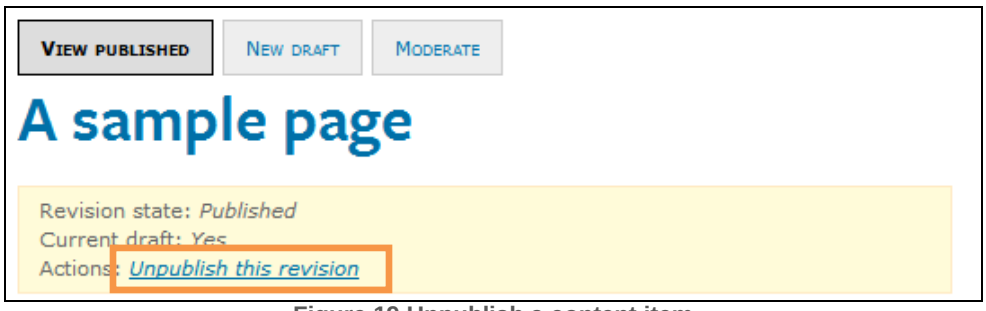


Figure 19 Unpublish a content item

3. A confirmation page will show. Click **Unpublish**.

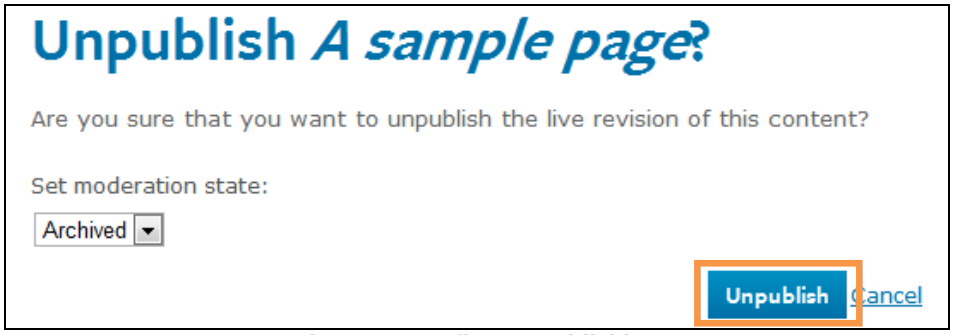


Figure 20 Confirm Unpublishing

4. Your content item is now Archived.

Apply Your Knowledge: Exercises

Complete **Exercise 6** in your Editor's Guide: *Exercises* manual.

Appendix A: Image Sizes

The following are the standard image sizes you may need for different content areas on your website.

Image	Width (Pixels)	Height (Pixels)
Homepage Rotator – Image and Text • Full Width • 2 Column • 1 Column	620 600 300	400 390 195
Homepage Rotator – Image Only • 2 Column • 1 Column	600 300	400 195
HD (Full Width) Homepage Rotator - Image Only	940	400
Image Promotion	280 (max)	180 - 225 (recommended)
Call to Action Promotion (Icon)	48	48
Featured Topics Thumbnail	100 (max)	100 (max)
	Featured Topic Thumbnail will be restricted to 100 pixels in both directions; images will proportionally scale down to make the largest dimension 100 pixels.	
Featured Image on Media Page	760	570 (recommended)
Photo Gallery and Video Thumbnail	100	100
Photo Gallery Full Size Image	800	600
Profile Thumbnail	200	200

Appendix B: WYSIWYG Editor

The WYSIWYG (What You See Is What You Get) Editor provides you with functions to enhance your content creation experience. Many of the function buttons will be familiar from Microsoft Word, and if you hover over an icon, a tooltip will tell you what each icon does. Some of the more detailed functions are listed below.

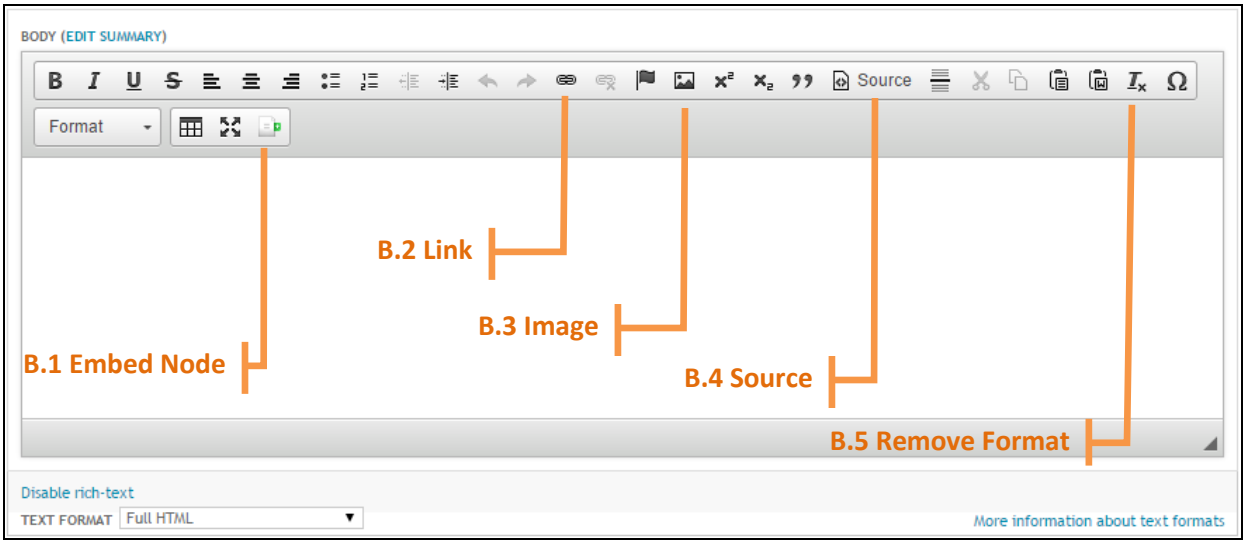


Figure 21 WYSIWYG editor

B.1 Embed Node

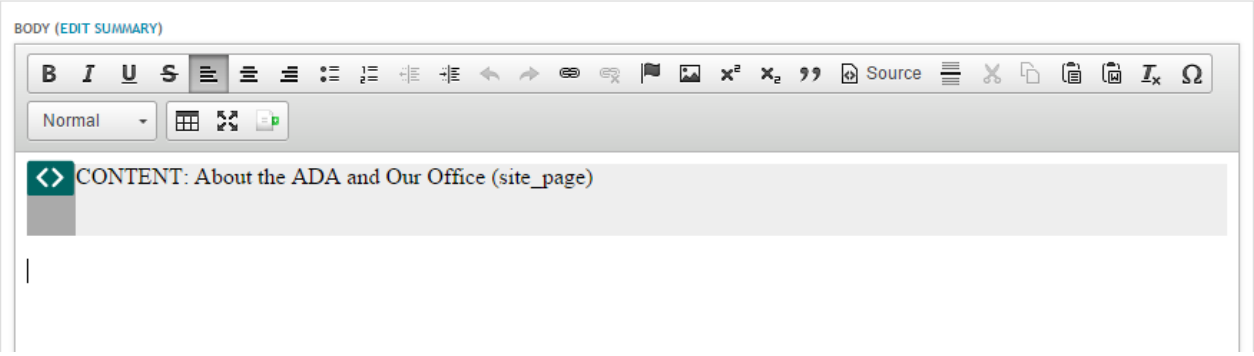
You can use the Embed Node function to embed another content item (such as an Index List) into a WYSIWYG field on a separate content item (such as on a Site Page).

1. Click on the **Embed Node** button. An Embed Node pop-up window appears.

2. In the **Content** field, start typing the name of the content item (such as an Index List) that you want to embed. The field should show an autosuggest list of content items with similar titles.

3. Select the appropriate content item. Click **Insert**.

4. The WYSIWYG area will show a reference to your content item. When you save the content item, the full content of the embedded item will show on the published page.



B.2 Link

To create a link within the Body of your content item:

1. Highlight the text you want to hyperlink and click the Link icon. A pop-up box will appear.

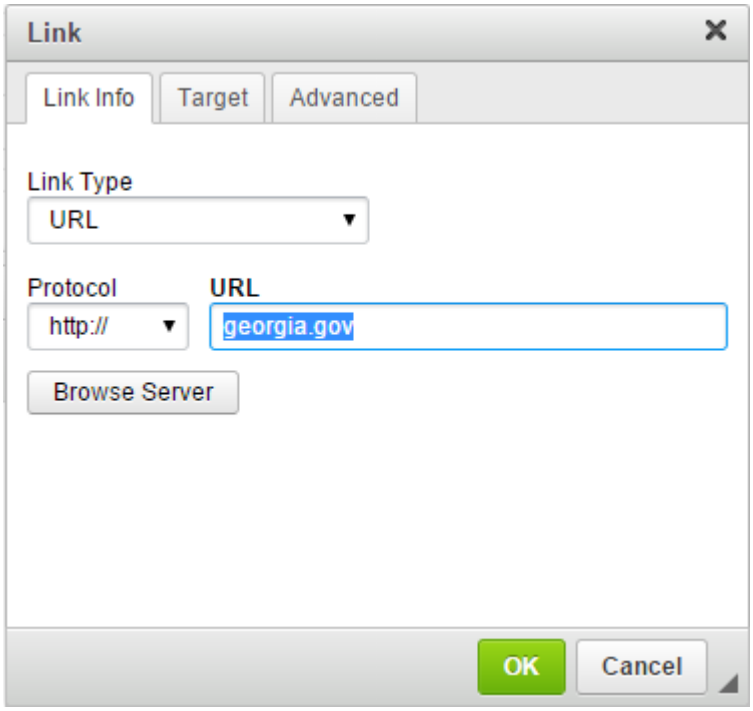


Figure 22 Insert Link pop-up window

2. From the Link Type dropdown box, you can choose to link to an external URL, an internal Anchor, or an Email address.

3. Alternately, you can select Browse Server to select a file to link to from the IMCE. (PDF, Word document, etc)

4. Fill out the fields and click **OK**.

Note: Most content types contain preset fields for inserting Related Links and Related Files. Whenever possible, please use those fields to insert links into your content item. Only use the WYSIWYG Link feature when the others will not work for your content.

B.3 Image

Images in the Text area should be no wider than 320px. If you have a full width image, it should be added to the Structured Image field.

To add an image inside a text area,

1. Click your cursor where the image should go, then click the **Image icon**. The Image pop-up window will appear:

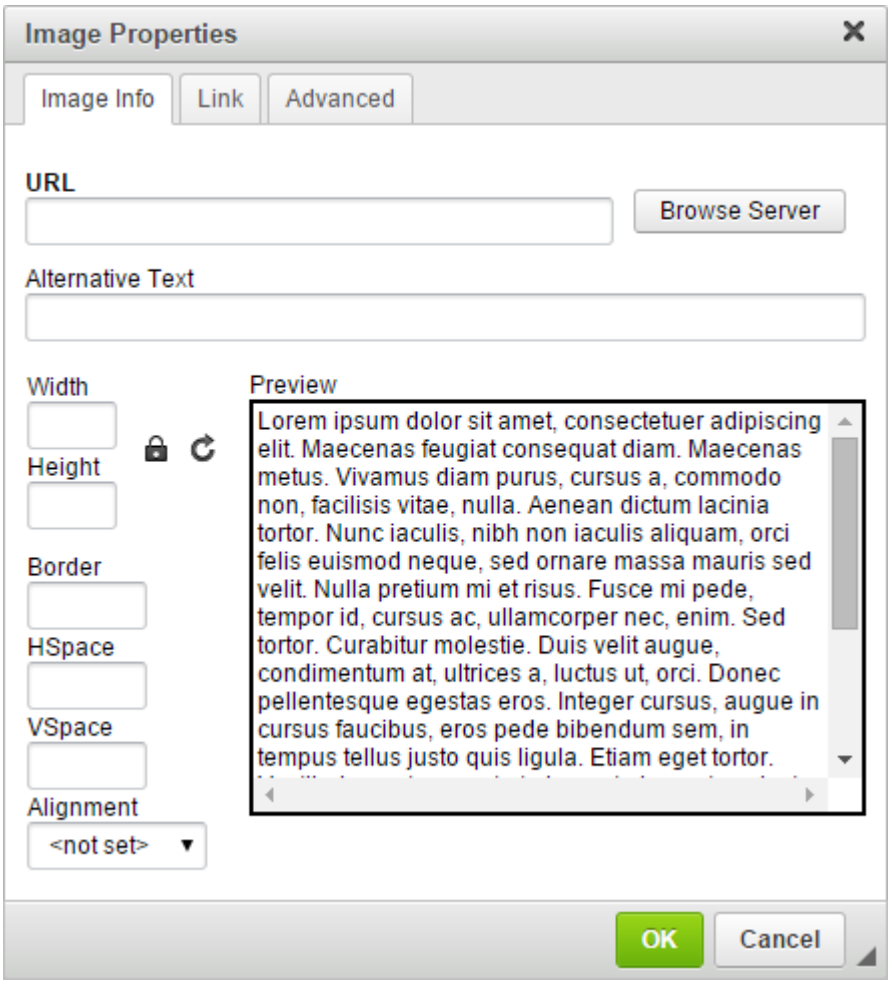


Figure 23 Image Properties pop-up window

2. Click the blue **Browse Server** button (it may take a few minutes to load the first time).

3. From the Browse Server pop-up window, you can choose an existing image from the server, or upload a new image.

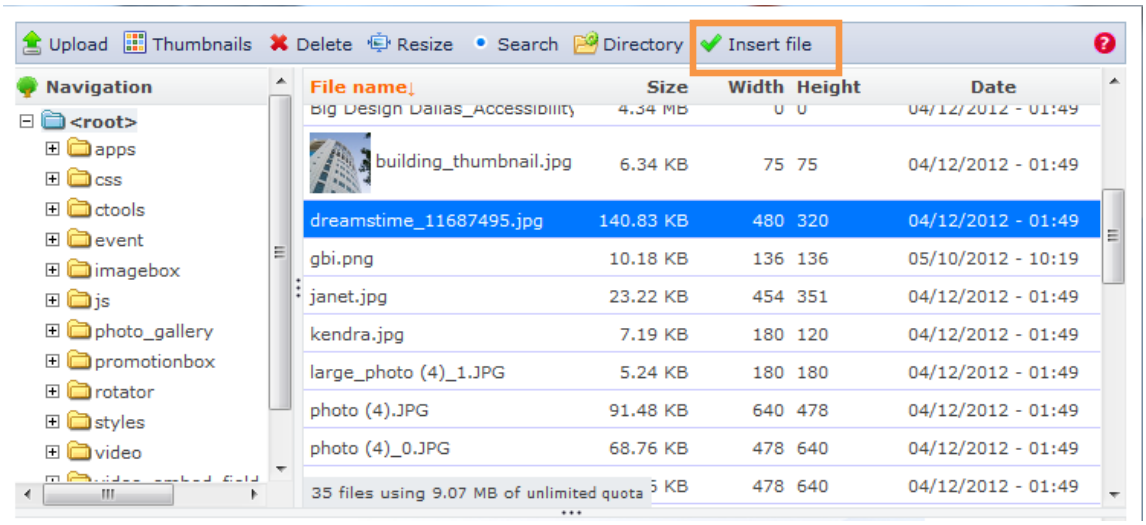
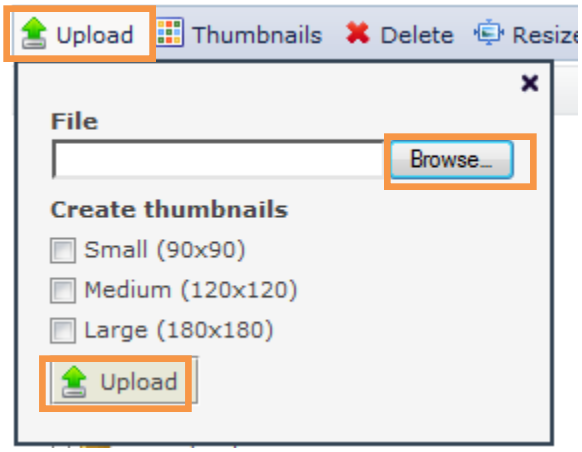


Figure 24 Browse Server pop-up window

a. To choose an existing image on the server, browse through the default folder of images.

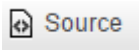
- Select the correct image and click **Insert File**.
- Add **Alternative Text** in the next screen, then click **OK**.

b. To upload a NEW image, click the **Upload** link. A File Upload section will load below the Upload link. Click **Browse**.



- Select your image, then click the bottom **Upload** button to upload your new image.
- Your new image will be uploaded to the server and highlighted in the File Browser. Click **Insert File**.
- Add **Alternative Text** in the next screen, then click **OK**.

B.4 Source

If you need to edit the HTML code for any reason, clicking the **Source** icon 

will show you the source code for your content. Clicking **Source** again will return you to the WYSIWYG view.

B.5 Remove Format

If you paste content from another location (a website, a Word document, an email, etc), the WYSIWYG editor will try to carry over the formatting from the source location. This will cause your new text to look wrong on your website.

To clear any formatting from another source,

1. Highlight the text that has the incorrect formatting.

2. Click the **Remove Format** button.