Drupal

Web Content Management (WCM)

Training Guide

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1. WCM Overview

1.1 Login

Username *				
Enter your SFGC Password *	DV username.			
Enter the passwo	ord that accompa	nies your usern	ame.	

How to Log In to the WCM

- 1. In the web browser's URL box, type the website domain name followed by /user.
 - Example: http://agencyname.org/user
- 2. After the page refreshes, you will be asked to enter your User Name and Password.
- 3. Enter your user name and password and click on the [button] entitled Log in.

NOTE: Password and Time- Out Guidelines

- Your password must be reset every 90 days.
- You will receive an email notification prior to the expiration date with detailed instructions.
- After 4 hours of inactive use while logged in to the WCM, you will automatically be logged out.

NOTE: Deleting Content on Drupal

- Page deletions are permanent
- You will NOT be able to recover deleted content
- Before you delete content the system will first ask you to confirm the deletion.

1.2 WCM Navigation



- After you log in, the WCM navigation will appear at the top of your browser window.
- Only logged in users to the WCM will see this navigation. The public will not see this on the live site.
- Using the WCM navigation you can:
 - Access Your Website's Homepage
 - Access Your Workbench Area
 - Log Out of the WCM
 - Add Content
 - Access Your Files and Images
 - Find and Edit Site Content
 - Set Menus

1.3 My Workbench

MY CONTENT	CREATE CONTENT	MY SECTIONS	MY DRA	FTS NE	EDS REVIEW
			My Edits	All Recent	Content
My Profile	My Edi	ts			
	Five of t	he most recently	updated piec	es of content	•
	TITLE	CONTENT GROUP	ТҮРЕ	PUBLISHED	LAST UPDATEE
	DT New	Default	Homepage	Yes	1 day 21

From the My Workbench screen you can perform the following functions.

- My Profile: Edit your personal profile.
- **My Edits**: View a list of your edited content.
- All Recent Content: View a list of all your recent content, with the ability to edit that content.
- Create Content: Create new site content
- My Sections: View a list of your editorial groups. You may edit any content in these sections.
- My Drafts: View a list of all your drafts.
- **Needs Review:** View a list of all your content that is pending review.

2. Add Basic Page

2.1 Add Content and Set Menus

How to Access the Basic Page Screen

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and select the [link] entitled Basic Page.
- **3.** On the Basic Page Screen fill the following fields.
 - **Title:** Enter your page title.
 - **Content Group:** Select the proper editorial group for this content.
 - **Body and Text Editor:** Enter your page content here for editing and formatting
 - Editor Toolbar: Mouse over each toolbar icon for a description of their function.
 - Menu Settings: Check "Provide a menu link".
 - Menu Link Title: Enter link title as it will appear in the Top Navigation drop down menu and in the right hand column on subpages.
 - **Parent Item:** Select the section of the site where you want the page and link title to appear.
- 4. Click on the [button] entitled Save.
- From View Draft click on the [link] entitled Edit Draft to edit the page before publishing.

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URL path settings Automatic alias	Menu link title
Revision information New revision	Parent item

NOTE: All system fields displaying a red asterisk are required fields. You must first publish the page in order for the menu link to appear in the top navigation drop down menu, and right hand column on sub level pages.

2.2 Add Links to Your Page

2.2.1 Create an Internal Page Link

- 1. In the text editor type the text that you want to link.
- 2. Highlight the text and click on the Link to content icon on the Editor Toolbar.
- **3.** From the Link It popup window do one of the following:
 - a) Search the content as you type. **OR**

b) Paste the URL to the internal page directly into the Target Path field.

c) Click on the [button] entitled Insert Link.

2.2.2 Create an External Page Link

- **1.** In the text editor type the text that you want to link.
- 2. Highlight the text and click on the Link icon on the Editor Toolbar.
- 3. Enter the URL to the external page (www.sfgov.org).
- 4. Click on the [button] entitled OK.

2.2.3 Create an Anchor Link

- **1.** In the text editor, place the cursor in the content area where the anchor link will exist.
- 2. Click on the Anchor icon on the Editor Toolbar.
- **3.** Enter the anchor name (i.e. "top") to set the anchor location and click on the **[button]** entitled **OK**.
- Highlight the text that you want to link (example: "Back to top") and click on the Link icon from the Editor Toolbar.
- 5. Under Link Type select "Link to anchor in the text".
- 6. From the **By Anchor Name** drop down menu select the anchor name (i.e. **top**).
- 7. Click on the [button] entitled OK.

2.2.4 Create a Link to a Document

- 1. In the text editor type the text that you want to link to your document.
- 2. Highlight the text and click on the Link to content icon on the Editor Toolbar.
- **3.** From the Link it popup window do one of the following:

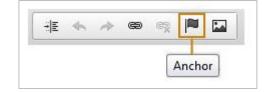
a) Search the content as you type. **OR**

b) Paste the URL to the internal page directly into the Target Path field. Under "File" list, select the preferred file.

c) Click on the [button] entitled Insert Link.







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2.3 Add Images and Documents to Your Page

2.3.1 Add an Image to Your Page

- 1. Place your cursor in the text editor and click on the Add Media icon on the Editor Toolbar.
- 2. Click on the Library (MBP) tab to access your site's images.
- **3.** Click on the Images folder and view the thumbnail images to the right.
- **4.** Click on the thumbnail image you want to insert to the page.
- 5. Click on the [button] entitled Submit.
- 6. On the next screen click on the [button] entitled Submit.

NOTE: An ALT text description must be added to each image included on site pages and within PDF files.

2.3.2 Format an Image

- 1. Select the image within the text editor.
- 2. Click on the Image icon on the Editor Toolbar.
- 3. Format the image in the Image Properties window and click on the **[button]** entitled **OK**.

2.3.3 Upload and Add a New Image or Document to Your Page

- 1. Place your cursor in the text editor and click on the Add Media icon on the Editor Toolbar.
- 2. Click on the [button] entitled Browse.
- **3.** Select the file you want to upload and click on the **[button]** entitled **Open**.
- 4. Click on the [button] entitled Upload.
- 5. Under the **Folder** menu, select the folder where you want the image to live.
- 6. Click on the [button] entitled Next.
- 7. On the next screen enter the Alt text for the image.
- 8. Click on the [button] entitled Save.
- 9. On the next screen click on the [button] entitled Submit
- **10.** On the Edit Basic Page click on the **[button]** entitled **Save** to save all your changes.

Guidelines for Adding Files

- Max Upload File Limit: 25MB
- No Media, Audio and Video files are allowed. (Contact SFGovTV for audio/video hosting services)
- Allowed File Types: DOCS: .csv, doc, .docx, .xls, .xlsx, .ppt, pptx, .txt, .pdf, .vsd, IMAGES: gif, jpg, png WEB: .html, .htm, .css





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2.4 Validate Content for Accessibility Compliance

View draft	Edit draft	Moderate	Accessibility
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Why Does Your Content Need to Be Accessibility Compliant

NOTE: The Federal Access Board requires Federal, State and local websites to be compliant with Section 508 Accessibility Guidelines to ensure content can be viewed by vision and hearing impaired users.

How to Validate Your Content for Accessibility Compliance

- 1. Save your basic page and from View Draft, click on the [link] entitled Accessibility.
- 2. Review the Accessibility results for any major failures.
- Click on the [tab] entitled Edit Draft to apply recommended solutions to any failures. OR
 Click on the [tab] entitled View Draft if no changes are needed.

2.5 Publish Your New Page

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Revision state:		nice or Disability		
Aost recent rev	vision: Yes			
Set moderation	i state:			
Needs Rev	iew			-

How to Publish Your New Page

- From the Draft View of your basic page, click on the [button] entitled Apply below the Needs Review drop down menu to change the moderation state.
- 2. Change the moderation state again to **Published** by clicking on the **[button]** entitled **Apply** below the Published drop down menu. Your page has now been published.

3. Add Meeting

3.1 Add Meeting Agenda

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and select the [link] entitled Meeting.
- **3.** From the Create Meeting screen fill the following fields.
 - **Content Group:** Select the proper editorial group for this content.
 - **Committee:** Select a committee.
 - Meeting Type: Select Agenda
 - **Meeting Date:** Enter meeting date and time.
 - Meeting Status: Enter the status of your meeting (ex. canceled). OPTIONAL
 - Meeting Location: Enter the meeting address/location. OPTIONAL
 - Body and Text Editor: Enter the content for your Agenda in the text editor or insert a document using the Add Media icon from the text editor toolbar
- 4. Click on the [button] entitled Save to save the meeting agenda.
- 5. From View Draft, click on the [button] entitled Apply below the Needs Review drop down menu.
- 6. Change the moderation state to Published and click on the [button] entitled Apply.

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Committee *		
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Agenda	-	
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3.2 Add Meeting Minutes

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and select the [link] entitled Meeting.
- **3.** From the Create Meeting screen fill the following fields.
 - **Content Group:** Select the proper editorial group for this content.
 - **Committee:** Select a committee.
 - Meeting Type: Select Minutes
 - Meeting Date: Enter meeting date and time. Note: Please select the "date" and "time" to match your Agenda.
 - Meeting Status: Enter the status of your meeting (ex. canceled). OPTIONAL
 - **Body and Text Editor:** Enter the content for your Minutes in the text editor.
- 4. Click on the [button] entitled Save to save the meeting minutes.
- 5. From View Draft, click on the [button] entitled Apply below the Needs Review drop down menu.
- 6. Change the moderation state to Published and click on the [button] entitled Apply.



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Meeting Type *				
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MY SECTIONS

3.3 Add Supporting Documents

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and select the [link] entitled Meeting.
- **3.** From the Create Meeting screen fill the following fields.
 - **Content Group:** Select the proper editorial group for this content.
 - **Committee:** Select a committee.
 - Meeting Type: Select Supporting
 Documents
 - Meeting Date: Enter meeting date and time. Note: Please select the "date" and "time" to match your Agenda.
 - **Body and Text Editor:** Add your document within the text editor by selecting the Add Media icon from the text editor toolbar
- **4.** Click on the **[button]** entitled **Save** to save the Supporting Document.
- 5. From View Draft, click on the [button] entitled Apply below the Needs Review drop down menu.
- 6. Change the moderation state to Published and click on the [button] entitled Apply.

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	minutes and supporting documents.
Cr	eate Meeting
Co	ntent Group *
-	ntent Group * Select a value - 💌
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CREATE CONTENT

Meeting Type *

Supporting	Documents	
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MEETING DATE *

MY CONTENT

Date	Time
Aug 5 2015	2:45PM
E.g., Aug 5 2015	E.g., 2:45PM

Body (Edit summary)

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Font	Size	-	Styles	-	HTT.

4. Add Event

4.1 Add a Calendar Event

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and the [link] entitled Event.
- **3.** From the Create Event screen fill the following fields.
 - **Title:** Enter the title for your event.
 - **Content Group:** Select the proper editorial group for this content.
 - Event Date and Time: Enter the date and time of your event.
 - Show End Date: You can choose to add the end date of your event. OPTIONAL
 - Repeats: You can choose to have the event be repeated.
 OPTIONAL
 - Event Location: Enter the address/location of your event. OPTIONAL
 - Additional Information Link: Enter a link to an external website or page.
 OPTIONAL
 - **Body and Text Editor:** Add your event details in the text editor.
- **4.** Click on the **[button]** entitled **Save** to save the calendar event.
- 5. From View Draft, click on the [button] entitled Apply below the Needs Review drop down menu.
- 6. Change the moderation state to Published and click on the [button] entitled Apply.

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9	Event		
	Use event to	add an event to event	calendar.

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5. Add Article

5.1 Add Article/News Release

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Click on the Create Content tab and select the [link] entitled Article.
- **3.** On the Create Article Screen fill the following fields.
 - **Title:** Enter your page title.
 - **Content Group:** Select the proper editorial group for this content.
 - Body and Text Editor: Enter your news content here for editing and formatting
 - Image: Add an image to your news release. OPTIONAL
- 4. Click on the [button] entitled Save to save the news article.
- 5. From View Draft, click on the [button] entitled Apply below the Needs Review drop down menu to change the moderation state.
- Change the moderation state again to Published by clicking on the [button] entitled Apply



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6. Find and Edit Content

6.1 Find Content to Edit

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Title		Type - Any -	Publishe ▼ Yes	d Sections Default CG	Items per page	Apply
TITLE	CONTENT GROUP	ТҮРЕ	PUBLISHED	AUTHOR	LAST UPDATED	
About	Default	Basic Page	Yes	editor	1 week 5 days ago	edit

Using Find and Edit Content

NOTE: The Find and Edit Content screen is used to find and access any content that you need to edit.

How to Find and Edit Content

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. From the "My Content" tab, click on the [button] entitled All Recent Content.
- 3. Use the filters at the top of the screen to quickly find the content that you need to edit.
- 4. Review the filtered list based on you filter selections.
- 5. Select your content to edit by clicking on the [link] page name Title under the Title column.
- **6.** From the Published View of your content, click on the **[link]** entitled **New Draft/Edit Draft** to get to the Edit screen.

6.2 My Edits

My Workbench C	Content			Hello s	staff Log out	-
Add content Files and I	mages Find and Ed	lit Content Set Menus				
Home						
My Workbench	MY CONTENT	CREATE CONTENT	MY SECTIONS	MY DRAFTS	NEEDS REVIEW	1
			Γ	My Edits All	Recent Content	
			L			

- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. Under the My Content tab select the [button] entitled My Edits.

NOTE: The My Edits screen is used to view content that only you have edited.

7. Managing the Homepage

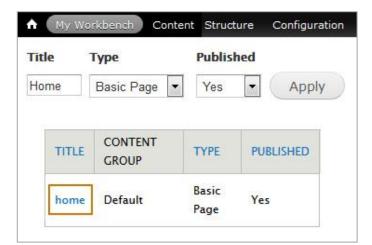
7.1 Edit Homepage Slideshow

How to Edit the Homepage Slideshow

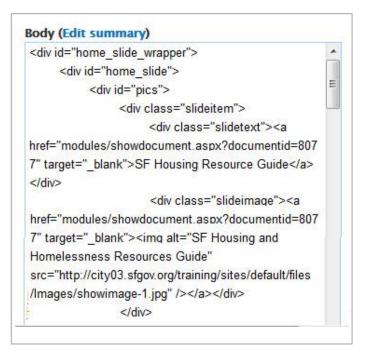
- 1. From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. From the "My Content" tab, click on the [button] entitled All Recent Content.
- **3.** Use the filters to quickly find the homepage content to edit. Enter the following info.
 - Title: Enter "Home"
 - Type: Select "Basic Page"
 - Published: Select "Yes"
- 4. Click on the [button] entitled Apply
- 5. From the filtered list, under the **Title** column, select the **[link]** entitled **Home.**
- From the Published View of your content, click on the [link] entitled New Draft/Edit Draft to access the Edit screen.
- 7. Go down below the text editor and click on the [link] entitled Disable rich- text.
- **8.** In the text editor window, you will see the HTML code for the Homepage content area.
- **9.** Locate the section related to the slideshow and make any necessary updates.
- **10.** Click on the **[button]** entitled **Save** to save your homepage slideshow updates.
- 11. From View Draft, carefully review your edits and click on the [button] entitled Apply below the Needs Review drop down menu to change the moderation state.
- Change the moderation state again to
 Published by clicking on the [button] entitled
 Apply

Guidelines for Homepage Slideshow

- Recommended max number of slides: 5
- Recommended minimum slides: 3



	4
Disable rich-text	



7.2 Edit Homepage Content Area

How to Edit the Homepage Content Area

- From the WCM Navigation bar select the [link] entitled My Workbench.
- 2. From the "My Content" tab, click on the [button] entitled All Recent Content.
- **3.** Use the filters to quickly find the homepage content to edit. Enter the following info.
 - Title: Enter "Home"
 - Type: Select "Basic Page"
 - Published: Select "Yes"
- 4. Click on the [button] entitled Apply
- 5. From the filtered list, under the Title column, select the [link] entitled Home.
- From the Published View of your content, click on the [link] entitled New Draft/Edit Draft to access the Edit screen.
- In the Body/text editor window make the necessary Homepage content updates.
- 8. Click on the [button] entitled Save to save your homepage updates.
- From View Draft, carefully review your edits and click on the [button] entitled Apply below the Needs Review drop down menu to change the moderation state.
- 10. Change the moderation state again toPublished by clicking on the [button] entitledApply

Title	1	Type	Publis	hed
Home		Basic Page	Yes	Apply
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The Program

We are excited to announce that the Program will make available more grant opportunities through our application process to neighborhood groups and community based organizations facilitating neighborhood beautification projects. Through our continued collaboration with The San Francisco Public Utilities Commission and new pilot partnership with San Francisco Planning Department, additional funding will be available to create healthier, vibrant neighborhoods.

8. Managing Files and Images

8.1 Add a File

- From the WCM Navigation bar select the [link] entitled Content and click on the [link] entitled Files.
- 2. From the Files tab, select the [link] entitled Add File.
- **3.** On the Add File screen, click on the **[link]** entitled **Add Files** and select the file to upload
- 4. Select the [link] entitled Start Upload.
- Select the Folder where you want your file to be stored and click on the [button] entitled Next
- 6. Enter an Alt description for your image and click on the [button] entitled Save

NOTE: An ALT text description must be added to each image included.

Guidelines for Adding Files

- Max Upload File Limit: 25MB
- No Media, Audio and Video files are allowed.
- Allowed File Types: DOCS: .csv, doc, .docx, .xls, .xlsx, .ppt, pptx, .txt, .pdf, .vsd IMAGES: gif, jpg, png WEB: .html, .htm, .css



Filename Size Status Drag files here. Image: Constraint of the state of the s

8.2 Edit and Delete a File



NOTE: You can manage Files and Images by selecting the **[link]** entitled **Content** and then clicking on **Files** from the **WCM Navigation** bar. The Files and Images screen is used to manage your site's images and documents. You can delete, add, or edit files and move them from one folder to another via the edit function.

9. Advanced Topics

9.1 Update and Set Menu Links

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MENU LINK	ENABLED	OPERATIONS	5	
🕂 Home		edit	dele	te
+ About Us	V	edit	dele	te
+ Residents		edit	dele	te

NOTE: You can manage and rearrange the order of the menu links by going to the **WCM Navigation** bar and selecting the **[link]** entitled **Structure**, **Menus**, **Main Menus**. You can add, edit, delete, enable or move menu items listed on the Main Menu screen. Once you have completed your updates, click on the **[button]** entitled **"Save Configuration"**.

9.2 URL Redirects (Feature for Editor User Type Only)

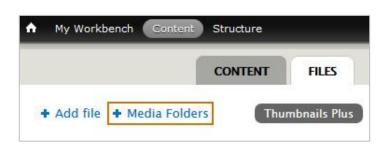
	L redire	cts					LIST	SETTINGS
Ad	ld redirect							
FIL	TER REDIR	ECTS						
1				Filte	r			
	FROM	•	то	STATUS	ТҮРЕ	COUNT	LAST ACCESSED	OPERATIONS

NOTE: This feature allows content administrators to redirect a page to another web page.

- 1. From the WCM Navigation bar select the [link] entitled Configuration, Search and metadata, URL redirects.
- 2. From the URL Redirects screen you can do the following:
 - Edit a Redirect
 - Delete a Redirect
 - Add a Redirect
 - Filter Redirects

9.3 Add Media Folders (Feature for Editor User Type Only)

- 1. From the WCM Navigation bar select the [link] entitled Content and click on Files.
- 2. From the Files tab, select the [link] entitled Media Folders.
- **3.** On the Media Folders screen, click on the **[link]** entitled **Add Term.**
- On the next screen enter the name of your folder in the Name form field and click on the [button] entitled Save.



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9.4 Add and Disable User Accounts (Feature for Editor User Type Only)

ot	ole						
+	Add user						
UP	DATE OPTIONS	5					
1	10400 0074400 1 / S00	EV 471					
U	nblock the selec	ted users		Update			
U	nblock the selec	ted users		Update			
U	USERNAME	STATUS	ROLES	Update MEMBER FOR	•	LAST ACCESS	OPERATIONS

NOTE: You can manage user accounts by going to the **WCM Navigation** bar and clicking on the **[link]** entitled **People.** You can add, edit, or disable user accounts from the People screen. Email Webmaster@sfgov.org if you need assistance.