Drupal

Web Content Management (WCM)
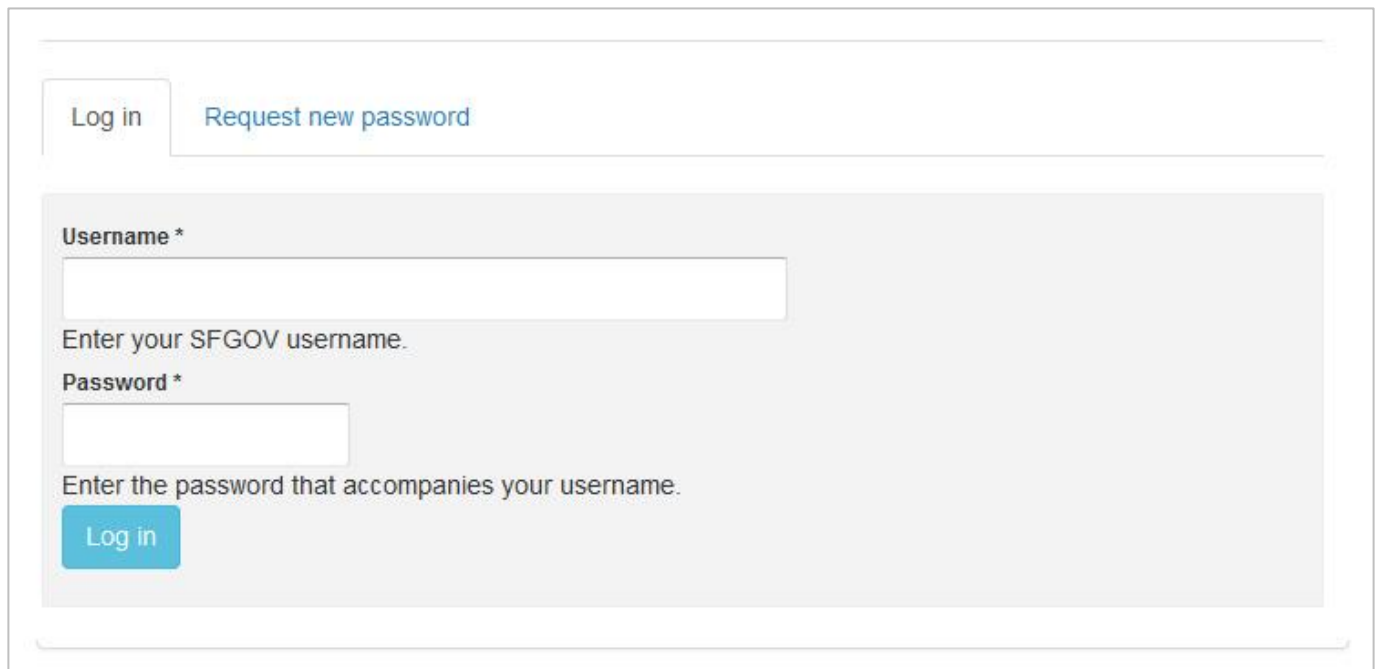
Training Guide

Contents

1. WCM Overview

1.1 Login

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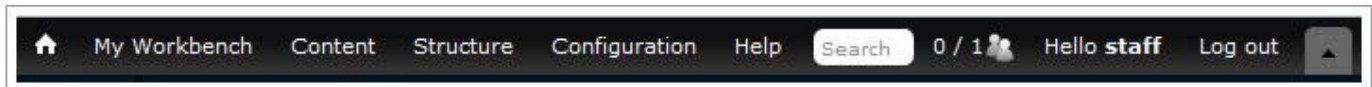
- After you log in, the WCM navigation will appear at the top of your browser window.
- Only logged in users to the WCM will see this navigation. The public will not see this on the live site.
- Using the WCM navigation you can:
  - Access Your Website's Homepage
  - Access Your Workbench Area
  - Log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

1.3 My Workbench

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.**

5. From **View Draft** click on the **[link]** entitled **Edit Draft** to edit the page before publishing.

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**.
4. 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**.
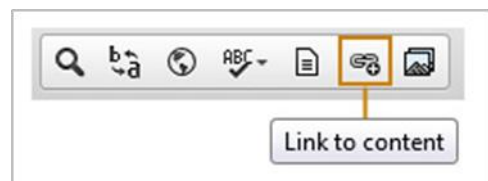
2.3 Add Images and Documents to Your Page

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**.**
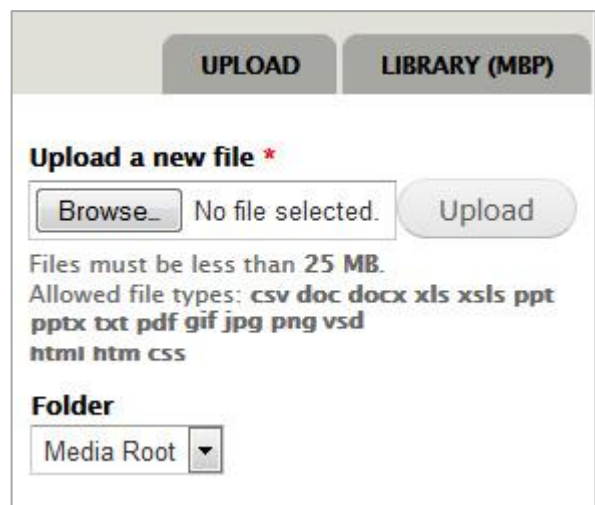
Guidelines for Adding Files

- 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

2.4 Validate Content for Accessibility Compliance

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.
3. 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

How to Publish Your New Page

1. 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**.
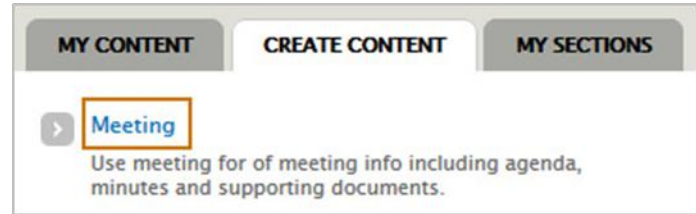
3.2 Add Meeting Minutes

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**.

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**.

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**.

5. Add Article

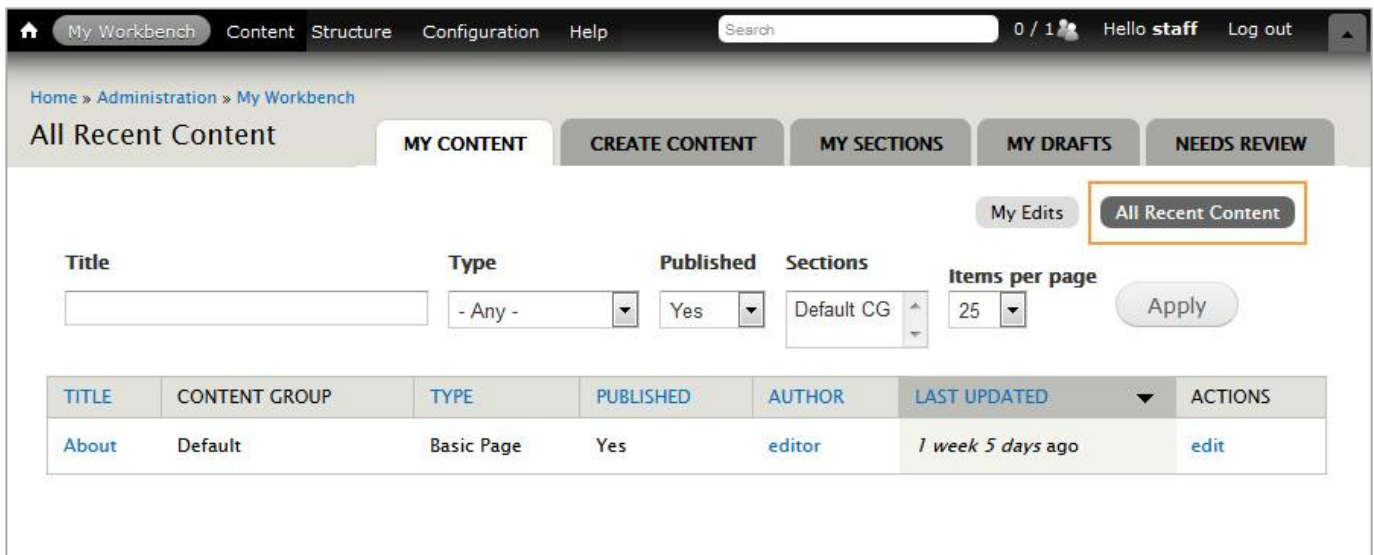## 5.1 Add Article/News Release

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.
6. Change the moderation state again to **Published** by clicking on the **[button]** entitled **Apply**

6. Find and Edit Content
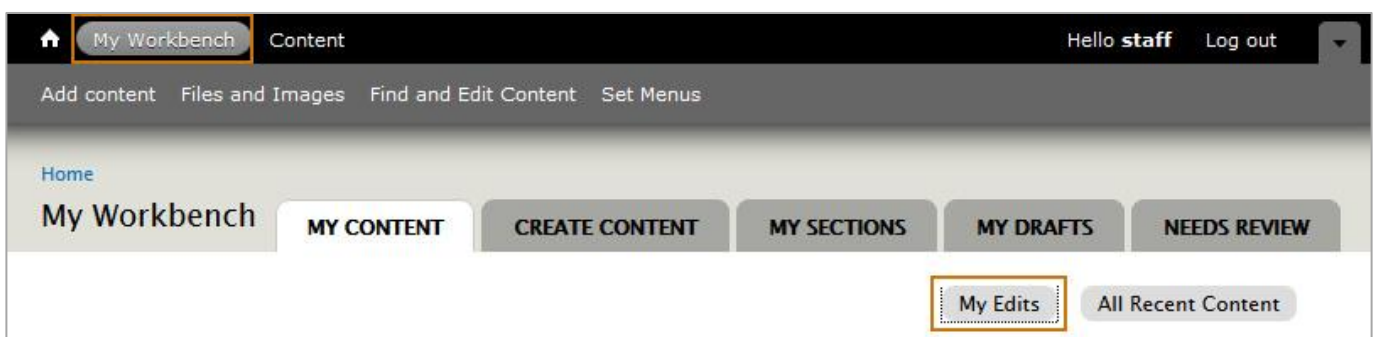
6.1 Find Content to Edit

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

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.**

6. 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.

12. 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

7.2 Edit Homepage Content Area

How to Edit the Homepage Content Area
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.**
6. From the Published View of your content, click on the **[link]** entitled **New Draft/Edit Draft** to access the Edit screen**.**
7. In the **Body/text** editor window make the necessary Homepage content updates.
8. Click on the **[button]** entitled **Save** to save your homepage updates.
9. 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 to **Published** by clicking on the **[button]** entitled **Apply**
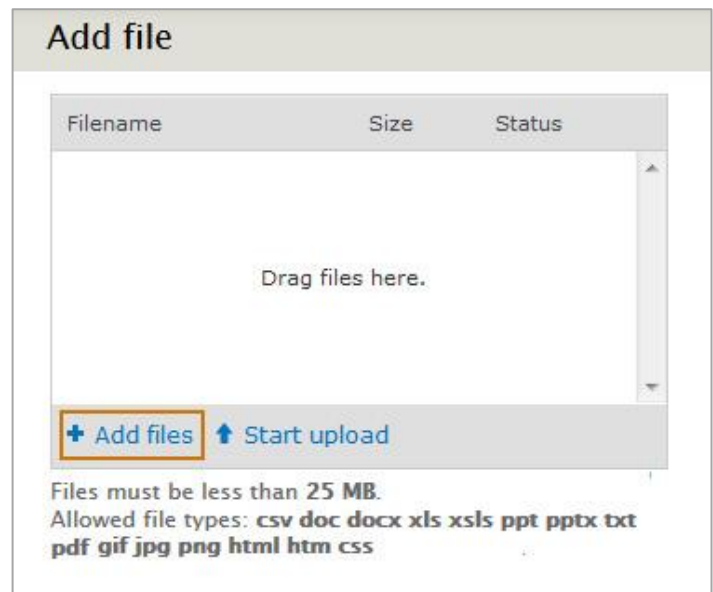
8. Managing Files and Images

8.1 Add a File

1. 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.**

5. 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

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

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)

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.**
4. On the next screen enter the name of your folder in the **Name** form field and click on the **[button]** entitled **Save.**
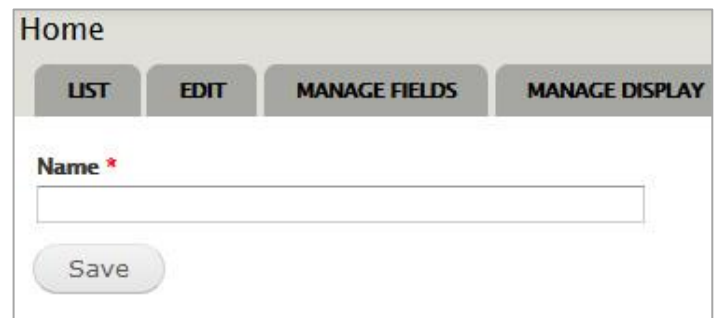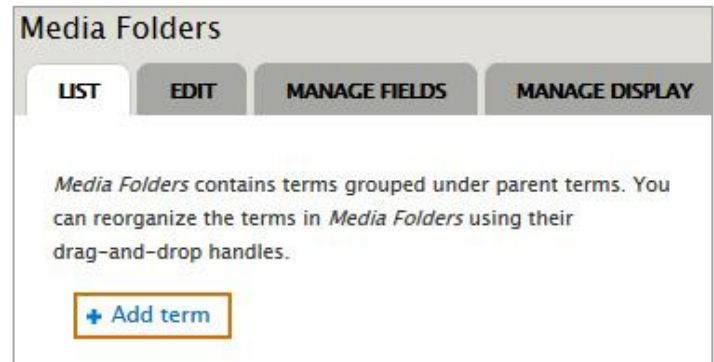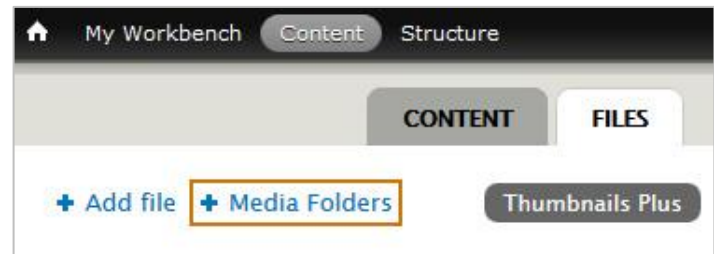
9.4 Add and Disable User Accounts (Feature for Editor User Type Only)

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.