

# Drupal 8 CMS User Guide

November 19, 2018



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## Overview

Welcome to your new website! The purpose of this document is to make you feel comfortable with managing your content.

This document may be read like a book or used as a reference. The topics will start broadly and then gradually become more specific.

Drupal Keywords will be capitalized, bolded, and italicized, e.g. *WYSIWYG, Paragraph, Block, Content Type, Media, Bundle*. Site-specific keywords will be italicized, e.g. *Profile, News, Event, Blog.* 

## **User Account & Management**

## **Account Login**

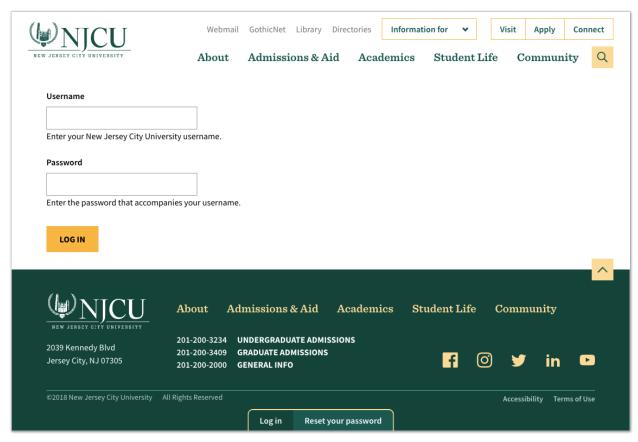
To log in to the website:

- 1. Visit /user
- 2. Enter your username and password

### Reset Lost Password

To reset a lost or forgotten password:

- 1. Visit /user
- 2. Click on the 'Request New Password' button at the bottom of your screen
- 3. Enter the Email address associated with the account
- 4. An email will be sent that contains a 1 time login link. After clicking on the link the user will be prompted to reset their password.



User login screen

## **Update Account Information (logged in)**

- 1. Visit /user
- 2. Click the 'Edit' button at the bottom of the screen
- 3. From this page you can then update information associated with the account such as:
  - a. Email address
  - b. Password

## Admin Menu

#### The Toolbar

Once logged in, a black and white administration **Toolbar** / menu will appear at the top of every page.

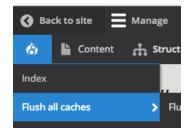


The administrative links shown may change based on *User Role*. For example, the *Author* role will only see this version of the *Toolbar*:



## Clearing Cache

One particular choice to note in the admin *Toolbar* is the *Flush All Caches* link (accessed by hovering the "8" on the top left"). Note that this item is only available to *Users* with the *Administrator Role*.



This allows you to flush the sites *Cache*. To display a *page*, Drupal needs to make several database queries. This can slow down websites with a lot of traffic. To make websites faster Drupal stores web pages in a *Cache*. Clearing the site *Cache* is usually one of the first steps you should take should you encounter an issue with the site. For example:

- If a piece of content isn't displaying after adding or updating.
- If something doesn't look the way you expect

Clearing *Caches* is relatively harmless. Sites might slow down for a bit afterwards while the *Cache* is rebuilt.

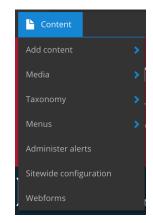
#### The Content Menu

The *Content* menu is where users have access to manage *Content*. Clicking on *Content* will take you to the content summary page, and hovering over *Content* display a sub-menu.

Items shown in this menu vary depending on your user role.

## **Development-Related Menu Items**

Only highest level *Roles* have access to the following items. Practice extreme caution when making changes in the following sections.



#### Structure

Here you have access to a lot of the nuts and bolts that make up the site. You can manage *Taxonomy Vocabularies* (tags), add *Fields* to *Content Types*, re-configure displays, change how content listings work. You probably won't be in here very often.

#### **Appearance**

Here you can change how the *Theme* of the site works. You can customize the admin or front-facing look-and-feel. You probably won't be in here very often at all.

#### Extend

Here you can install or uninstall Drupal *Modules*. This can be pretty dangerous. You'll want to be sure to backup the database before making almost any change in here.

### Configuration and People

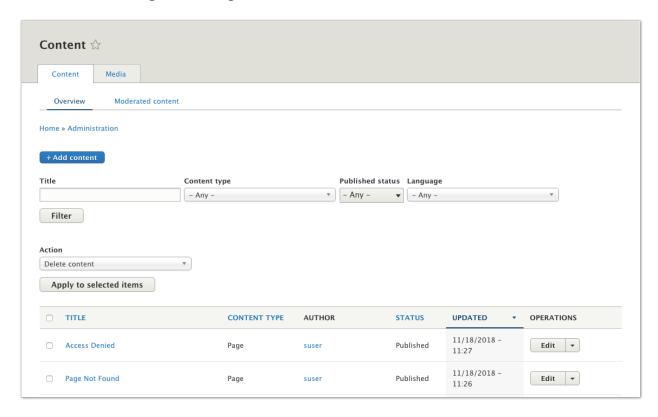
Here you can manage *Users* (create, block, delete, welcome message), basic site configuration (home page, site name), which *WYSIWYG* widgets are available and who has access to them, content moderation states, url path patterns, caching, and more. You probably won't be in here very often.

## **General Editing**

## **Content Overview Page**

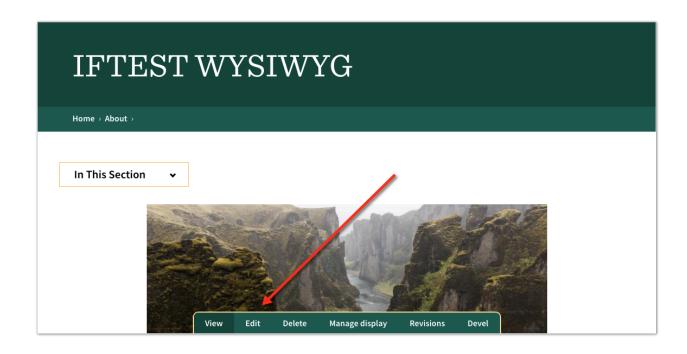
Clicking on the *Content* link will take you to a list of all content on the site. From here you can perform the following tasks:

- Filter for *Content* on the site using the provided filters.
- Quick access to visit or edit the desired *Node* on the site.
- Perform **Bulk Operations** such as the following:
  - Publish/Unpublish content
  - Delete content
  - Change authoring information



Hovering over the *Content* menu item will allow you to quickly add new content from the pre-defined types.

Additional administrative tabs/links will appear at the top of the content area for most pages. When looking to edit a particular piece of content it may be more efficient to browse to the page in question and use the page specific tabs/links. The tabs/links shown will vary depending on your user role.

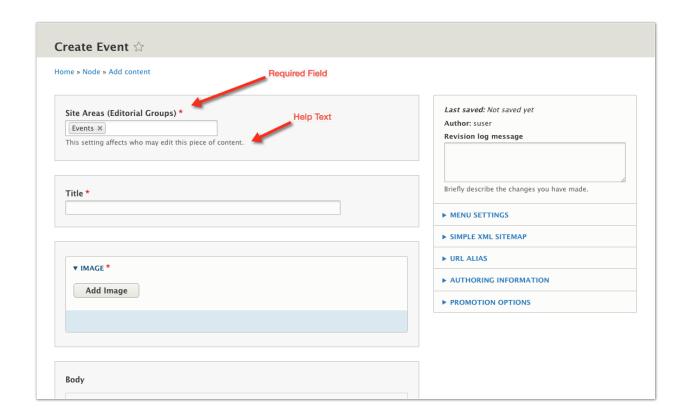


## Node Create/Edit Form

Most content on the website is characterized as a **Node** by Drupal. For example, an *Event*, a "Contact Us" *Page*, and a *Blog post* are all considered **Nodes**. Following are some helpful tips for dealing with the creation and editing of **Nodes** in your Drupal website.

#### **Fields**

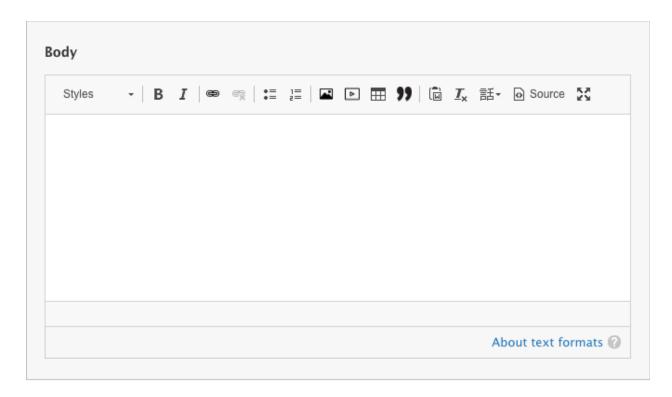
Each **Node** form will have different form **Fields** that represent the content. Required **Fields** are marked with a red asterisk. **Help Text** will appear with certain **Fields** to guide content creators.



#### **WYSIWYG Editor**

**WYSIWYG** is short for "What You See Is What You Get." It is a type of form control used frequently on the site that allows you to style text areas. From the basic editor you can make text bold or italic, create links, blockquotes, bullet or number lists, and embed **Media** (images, videos, etc).

*Tip: ☆Return will give you one-line break (vs. two lines)* 



#### Elements explained, from left to right:

- 1. Styles: Provides custom formatting options for text in the editor.
- 2. Bold text.
- 3. Italicize text.
- 4. Add link.
- 5. Remove link.
- 6. Embed a bulleted list.
- 7. Embed a numbered list.
- 8. Embed an image.
- 9. Embed a linked video (YouTube or Vimeo).
- 10. Embed a table.
- 11. Embed a blockquote.
- 12. Paste from word. (Recommended helps with formatting)
- 13. Clear formatting clear any special formatting applied to the selected text.

- 14. View HTML source
- 15. Expand WYSIWYG area to full screen

#### **Styles: Custom Text Formats**

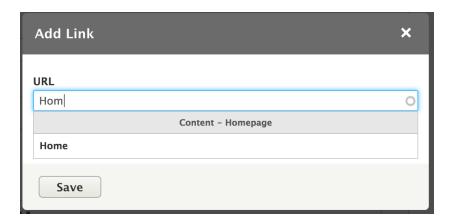
The **WYSIWYG** editor also allows the addition of some custom inline styles as determined in the site design. These styles can be applied by highlighting the targeted text and choosing your desired style from the *Styles* dropdown (pictured to the right). *Note: Some styles are reserved for links and will only appear if you're highlighting a link.* 



#### **Adding a Link**

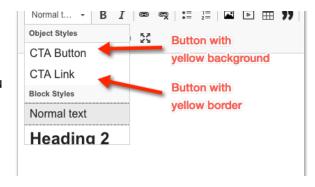
To add a link to your content follow these steps:

- 1. Highlight the copy in the editor that you would like to be a link
- 2. Click the link button in the editor toolbar. After clicking this link the link dialog will open.
- 3. Type a path as you would your browser or, for links to internal content, type the title of the *page*.



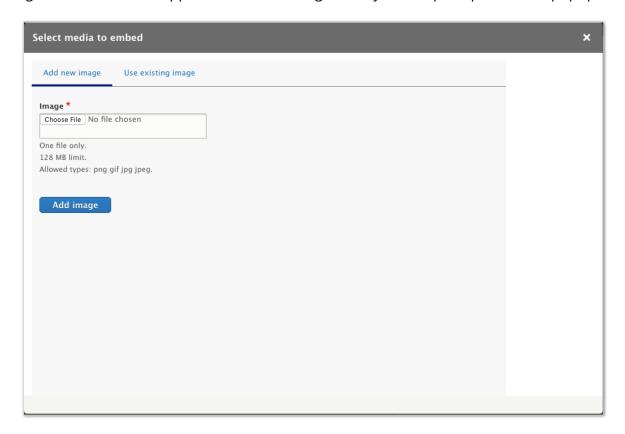
#### **Link Styles**

To make a link into a CTA button, first <u>create a link</u>. Afterwards, make sure the text cursor is on the link by clicking on it. Next, click the styles dropdown menu (shown on the right) and select "CTA Button".



#### **Embedding Media (Image, Video, Audio, etc)**

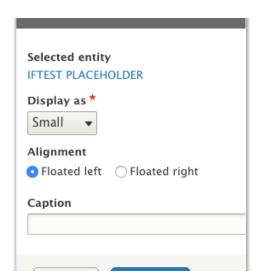
*Images* and *Videos* are supported. When adding *Media* you'll be prompted with a popup.



For example, this is the modal for embedding an *Image*. On the top are two links: one to add (upload) an *Image* and one to use an existing *Image*.

After you choose and review your media, there are some extra options for *Media* such as *Images* and *Quotes* as shown on the right. Under "Display as", there may be several options:

- Small Makes the embedded *Media* smaller so that text may float around it.
- Full Width Ensures the embedded *Media*takes up the entire width of the content area
- Natural Displays the embedded *Media* exactly the size it was uploaded. Be careful with this option, because the design and loading time may be compromised if the *Image* is too large.



A more detailed description of each *Media* may be found in the <u>media section of this</u> document.

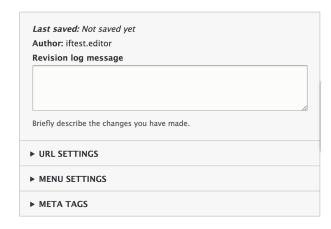
### **Node Settings**

The *Node* settings allow you to control the following:

#### **Revision Log Message**

Leave a log message about what changed with this edit of the content. This is never displayed to a site visitor, it's used purely for administrative purposes.

It is **recommended** but not required to leave a revision log message.



#### **URL Settings**

URL path settings are all configured to be set automatically. This will help preserve the sitemap and help to keep content in relevant places. However, if you would like to override the URL path alias this tab gives you the ability to do so.



To override the URL path settings:

- 1. Uncheck the Generate automatic URL alias checkbox
- 2. Enter your custom URL alias in the URL Alias field

If you would like to revert a custom URL alias back to an automatically generated alias, just check on the Generate automatic URL alias checkbox and save the node. A redirect will automatically be created to forward users to the new URL.

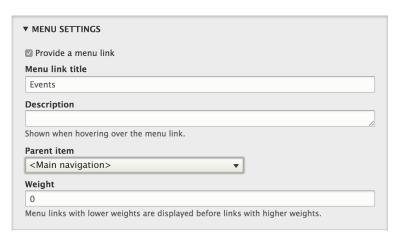
#### **Menu Settings**

Not all **Content Types** can be placed directly into **Menus**, if the **Menu** settings tab is not available it means you can not put that content directly into a **Menu**.

The *Menu* settings tab allows you to perform the following tasks.

- Set the *Menu* link title. By default the *Menu* link title
  - is set to the title of the *Node*, but you can override that with this *Field*. This is helpful if a *Node's* title is long or convoluted.
- 2. Set a description that shows when hovering over a *Menu* item. This can be left blank since it tends to overwhelm users when trying to navigate the site.
- 3. Set the *Node's* parent item. This allows you to place the *Node* under its parents in the site structure.
- 4. Set the *Menu* link weight. The weight determines the position of the *Menu* item next to its siblings. For example, in a dropdown *Menu* items that are lighter, i.e. a weight of 1, will be higher in the *Menu* than a *Menu* link that is heavier, i.e. a weight of 5.

**Menu** links and structure can also be added and managed by editing the **Menus** directly.



#### **Meta Tags**

Under the *Menu* Settings box, there is the option for updating the Meta Tags for the page in question. The Meta Tags options will assist with SEO. The most important box is the Page Title (This is the page title in the HTML code, not the Page Title that appears on the page).

By default, this is set to show the current Title and the Site Name. However, it can be edited on a page by page basis. For instance, if the page was "About", the Meta Tag Page Title could be changed to "Learn More About New Jersey City University".

Default meta tags are being set for each page are as follows:

#### **Page Title**

- Page title | Site Name
- E.g. Home | NJCU

#### **Description**

 If not specifically set the default is to take a trimmed part of the body content

To update the meta tags for pages

- Page title: Clear out default values and enter the desired page title
- Description: Clear out default values and enter the desired page description.
- Abstract: Add desired abstract if so desired. The abstract is used by search engines for archiving purposes.
- Keywords: Keywords are not used by search engines anymore, but if you would like to add them enter your keywords here.

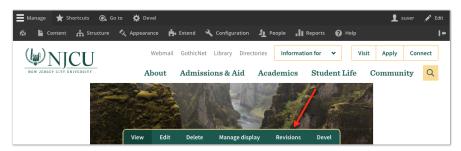
#### Configure the meta tags below. To view a summary of the individual meta tags and the pattern for a specific configuration, click on its name below. Use tokens to avoid redundant meta data and search engine penalization. For example, a 'keyword' value of "example" will be shown on all content using this configuration, whereas using the [node:field\_keywords] automatically inserts the "keywords" values from the current entity (node, term, etc). Browse available tokens. **▼ BASIC TAGS** Simple meta tags. Page title [node:title] | [site:name] The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page, or as the page title in a search engine result. It is common to append '[site:name]' to the end of this, so the site's name is automatically added. It is recommended that the title is no greater than 55 - 65 characters long, including spaces. Description [node:field\_intro] A brief and concise summary of the page's content, preferably 320 characters or less. The description meta tag may be used by search engines to display a snippet about the page in search results. Abstract A brief and concise summary of the page's content, preferably 150 characters or less. Where as the description meta tag may be used by search engines to display a snippet about the page in search results, the abstract tag may be used to archive a summary about the page. This meta tag is no longer supported by major search engines. Keywords A comma-separated list of keywords about the page. This meta

tag is no longer supported by most search engines.

**▼ META TAGS** 

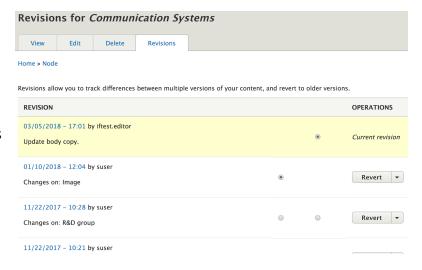
#### **Content Revisions**

Drupal creates a new *Revision* every time a *Node* is updated. This allows you to track how the *Node* has changed over time on your site. It also allows you to *Revert* back to a previous state if an error was made.



Click the "Revisions" link to see revisions of the node you are currently on

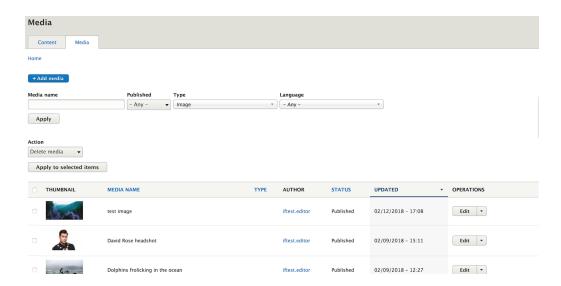
- 1. The *Revision* column shows you a when a *Revision* was made and who is responsible for the *Revision*.
- 2. A *Revision* log message helps inform users of the changes that were made to the *Node*. It's not required to create a log message, but it's encouraged as it makes it easier to track changes over time.
- You can revert to a previous *Revision* or delete *Revisions* using the operations column.



### Media

Similarly to the content overview page, clicking on the *Media* link will take you to a list of all *Media* on the site. From here you can perform the following tasks:

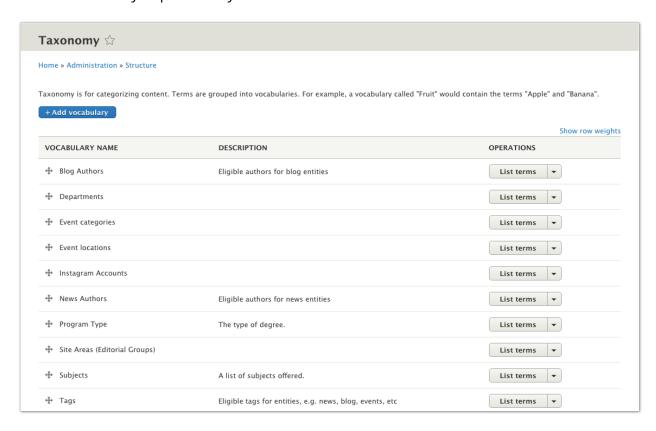
- Filter for *Media* on the site using the provided filters.
- Quick access to edit the desired *Media* on the site.
- Perform **Bulk Operations** such as the following:
  - Publish/unpublish Media
  - o Delete *Media*



Read more info on *Media* Types.

## **Taxonomy**

Much of your site's information (e.g. types, authors, categories) is managed through *Taxonomies*. Use this area to manage these *Taxonomy Terms*. Please note that access to the site taxonomy depends on your user *Role*.



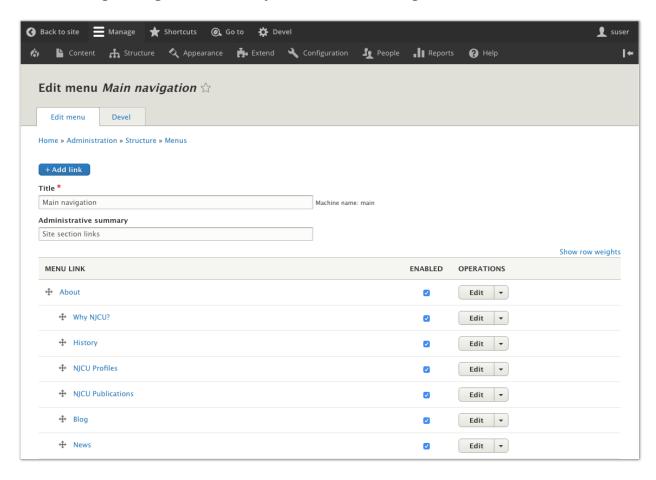
#### **Administer Menus**

Your website utilizes four *Menus*:

- Main Navigation
  - This is the primary navigation on the site.
- Header ancillary navigation
  - o This menu shows links in the header next to the 'Information For' dropdown
- Header audience navigation
  - This menu shows links that appear in the 'Information For' dropdown in the header
- Footer utility
  - This menu shows links in the footer of the site

While you can add **Nodes** directly into **Menus** for some **Content Types** on the site, there are going to be cases where you would like to add other items into the **Menu**. It's also likely you are going to want to move links in the **Menu** to achieve the desired site structure.

When clicking **Manage Main Menu**, you'll see the following screen:



#### From here you may:

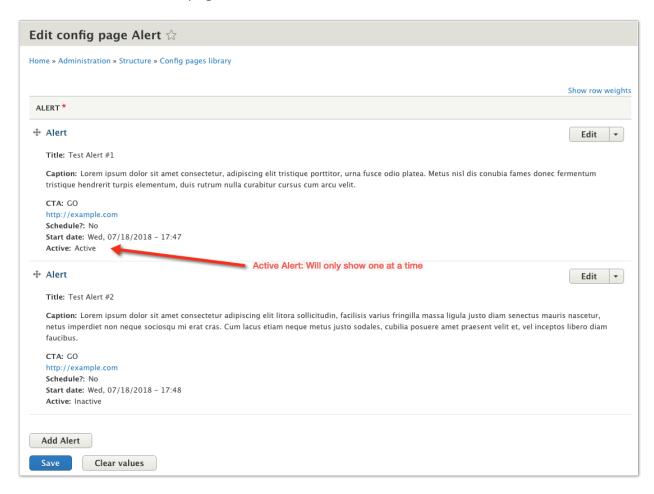
- 1. Add a new *Menu* link to a menu by clicking the **Add Link** button.
- 2. Use the drag and drop interface to reorganize the *Menu* structure.

Access to manage menus depends on your user Role.

Take care when managing **Menus**. Updating **Menus** can affect the site in negative ways if not done properly. Please be sure you know what you are doing before jumping in and start moving and deleting menu items. **Menus** are the primary way visitors navigate the site. Be careful not to rearrange the top level **Menu** items as this could potentially affect the styling of the site. Please ask a site **Administrator** if you would like to make such changes.

### **Administer Alerts**

The Alerts administration page shows an entire list of alerts to choose from.



You may add, edit, and remove *Alerts* as you please, but only one active *Alert* will show at a time. If an *Alert* is set to be scheduled, it will only show between the chosen start date and end date.

### **Footer**

The *footer* of the website is a Drupal *Block*. The *Edit* page allows you to change the *address*, *copyright text*, and *footer links*. Should you need to change the social media links, please see the <u>sitewide configuration section</u>.



Note: Only users with permission may edit the footer components.

## **Content Types**

Following is some general information and tips about specific *Content Types* available in the website.

### Page

Use *pages* for your static content, such as an 'About us' *page*. This *Content Type* will be used for the majority of the pages of the website. In most cases these pages will be built with various *Paragraph Bundles*.

Basic *Pages* should be inserted into the appropriate *Menu* hierarchy.

Care and thought should be given before a basic *Page* is deleted. Other *Pages* may have internal links to the deleted *Page*, and more importantly, other content may be "assigned" to appear on that *Page*.

## Blog

Used to add a new Blog post to the site. Blog posts are automatically shown in listings.

### **Events**

Used to add a new *Event* to the site. *Events* are automatically shown in listings.

### Degree Program

Used to add a new *Degree program* to the site. *Degree programs* are automatically shown in the *Degree finder*.

## **Landing Page**

The homepage on the site is an example of a *Landing Page*. *Landing Pages* can be helpful for testing a new homepage layout or to create a custom landing page within the site.

### **Profile**

Used to add a new Profile to the site. Profiles are automatically shown in listings.

### News

Used to add a new *News* article to the site. *News* articles are automatically shown in listings.

*News* articles cover events or moments that have already happened.

## Statistic

Used to add a new featured *Statistic* to the site. *Statistics* are shown in *Paragraph bundles* that can be embedded in pages on the site.

## Media Types

All *Media* on the site can be managed from the *Media* admin page which can be accessed via the 'Content' admin or at '/admin/content/media'

All *Media* can be created inline (in the *WYSIWYG* editor).

All *Media* that require a file upload also have a "Content Type" *Field*. Your selection will determine where the file is saved in the file system.

#### Document

Documents such as txt, pdf, doc, or docx are allowed to be uploaded to the site.

### **Image**

In addition to the *Image* users should provide *Captions* if necessary. *Images* added to the site are automatically cropped and resized when displayed to visitors.

### Quote

Quotes are a styled 'blockquote' that can be shown in a **WYSIWYG Paragraph Bundle**. Quotes have not only the quote but a source. Quotes may only be created inline.

### Video Embed

*Videos* can be embedded in a *WYSIWYG Paragraph Bundle*. The *video* should be a url from YouTube or Vimeo. *Editors* also need to provide a fallback image.

## Paragraph Bundles

The *page* content type (and several other content types for that matter) will be mostly built from various *Paragraph Bundles*. These *Bundles* allow content editors to pick the types of content blocks they can display on a particular page.

Each **Bundle** has different fields available and caters to a specific graphic design.

To help you visualize what a **Paragraph Bundle** is, here is a collage of various different **Paragraph Bundles**. Each image below is its own bundle. Think of a **Paragraph Bundle** as a display object as defined in the functional specification.









## User/Role Management

Currently only Administrators can manage Users/Roles.

Drupal uses a *Role/Permission* based system for administration. *Permissions* are assigned to *Roles*, and *Users* are added as *Members* to each *Role*. A *User* can be associated with multiple *Roles*.

All *Users* are listed at /admin/people. From this screen, *Users* can be created/edited/deleted and assigned to *Roles*.

#### **Delete Account**

To delete or disable an *Account* select "cancel account" at the bottom of the edit screen. Next, you will be presented with a collection of choices for dealing with the content created by this *User*.

When cancelling the account
Olisable the account and keep its content.
Oisable the account and unpublish its content.
$\bigcirc$ Delete the account and make its content belong to the <i>Anonymous</i> user.
Oelete the account and its content.
Require email confirmation to cancel account When enabled, the user must confirm the account cancellation via email.
Select the method to cancel the account above. This action cannot be undone.
Cancel account Cancel

### **Managing Roles**

**Roles** are managed from the /admin/people/roles screen. Ideally, all of the necessary **Permissions** are in place for each **Role**, but they can be adjusted at /admin/people/permissions. Exercise caution when editing **Permissions**, the Drupal **Permission** system can be confusing.

## Miscellaneous

This section will go over the items left in the *Content* sub-menu that has not yet been covered.

## Site wrapper

This configuration page contains fields that affect display throughout the site. Below are a brief explanation of the *Fields* exposed on this page.

### **Header Logo**

This is the logo displayed in the header on each page. You should not need to change this, but if you do, please use an image that is 190 pixels wide by 65 pixels tall.

#### **Header CTAs**

These are the links that show to the right of the *Information for* dropdown in the header

#### **Footer Logo**

This is the logo displayed in the footer on each page. You should not need to change this, but if you do, please use an image that is 190x65px.

#### **Address**

This is the university address that shows below the logo in the footer.

#### Phone numbers

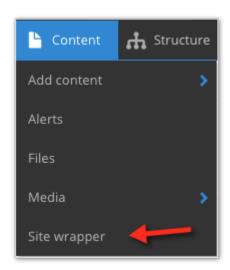
These are the phone numbers that show in the footer of the site.

#### **Social Profiles**

These are the links associated with the social icons in the footer of the site.

#### Copyright

This is where you would update the copyright that shows in the footer should you need to do so.



## Webforms

Although this website has not been configured with any specific webforms, the Drupal contributed Webforms *Module* has been installed for your convenience. It comes bundled with a generic "Contact" form as an example to get you started.

To learn more about how to use this powerful module, read the documentation at <a href="https://www.drupal.org/project/webform">https://www.drupal.org/project/webform</a>