Digital Commons Site Administrator Training

SUMMARY: Training to help new Site Administrators of the NC Digital Commons Platform to manage users, manage menus and manage taxonomy.

Contents

User Management

User Roles

The roles are listed in order of hierarchy, from lowest level of permissions to highest. Your role determines what features you can access, what types of content you can create, and whether you have permission to publish.

- Event creator: Can only create and publish new items for the calendar.
- Editor: Can create and edit most kinds of content but can only publish events. Cannot create or edit landing pages or blocks. Can access their own webform submissions only. May only delete their own content.
- Publisher: Can do all the Editor functions, plus publish most kinds of content. Cannot create or publish landing pages, but can edit existing blocks on landing pages. Cannot put items in the menu. May only delete their own content.
- Site Manager: Can do all of the Publisher functions, plus create landing pages, blocks, and taxonomy. Can access all webform submissions. Cannot add items to or edit the menu.
- Site Admin: Can do all Site Manager functions, administer users on the platform (assign them their roles), and manage the menu. Can administer all aspects of the menu.

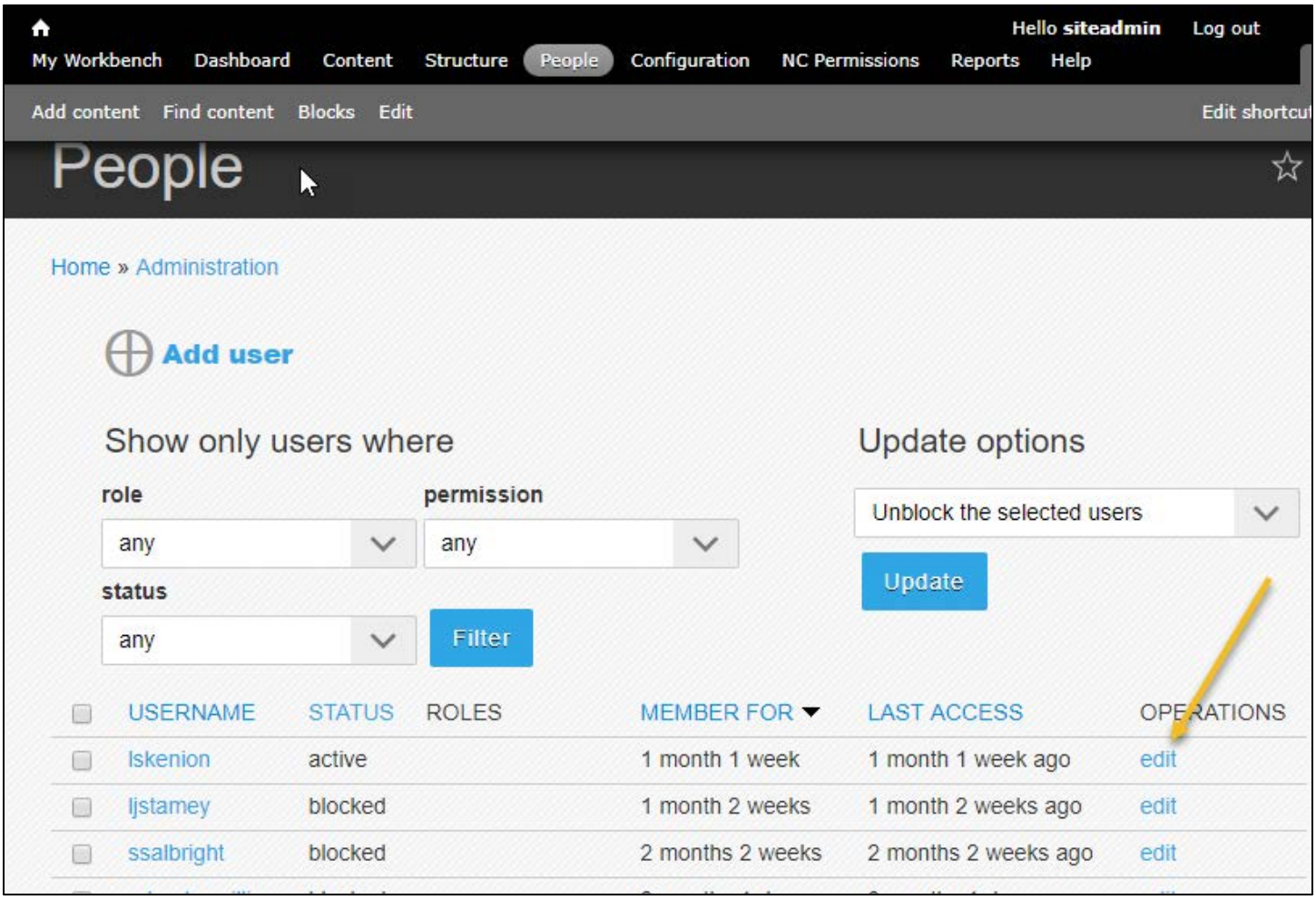
Roles/ Permissions	**Create & Publish Calendar Events**	**Create New Content**	**Edit Content**	**Save as Draft or Needs Review**	**Publish Content**	**Create Blocks**	**Manage Landing Pages**	**Manage Webforms**	**Manage Menus**	**Administer Users**
Event Creator										
Editor										
Publisher										
Site Manager										
Site Admin										

Adding a User to Your Website

Our platform is integrated with NCID, the state's identity management system. No user profiles or passwords need to be assigned.

Anyone with an NCID can go to your website address, /user, and log in with their NCID. On their first sign-in, they will have no more permissions than any site visitor—they can't modify the site in any way. You as Site Admin must assign their role before they have access.

1. Send the new user to [your website address]/user, and ask them to log in with their NCID.
2. Then you (the Site Admin) select ***People*** in the black Admin menu. The new user appears at the top of the list of users.
3. Click ***edit*** in the right column (see screenshot below).



4. The password and email should never be edited. These are part of the integration with NCID.
5. Status should be Active. If not, select it.
6. Choose the appropriate role.
7. Scroll to the bottom of the form and Save.

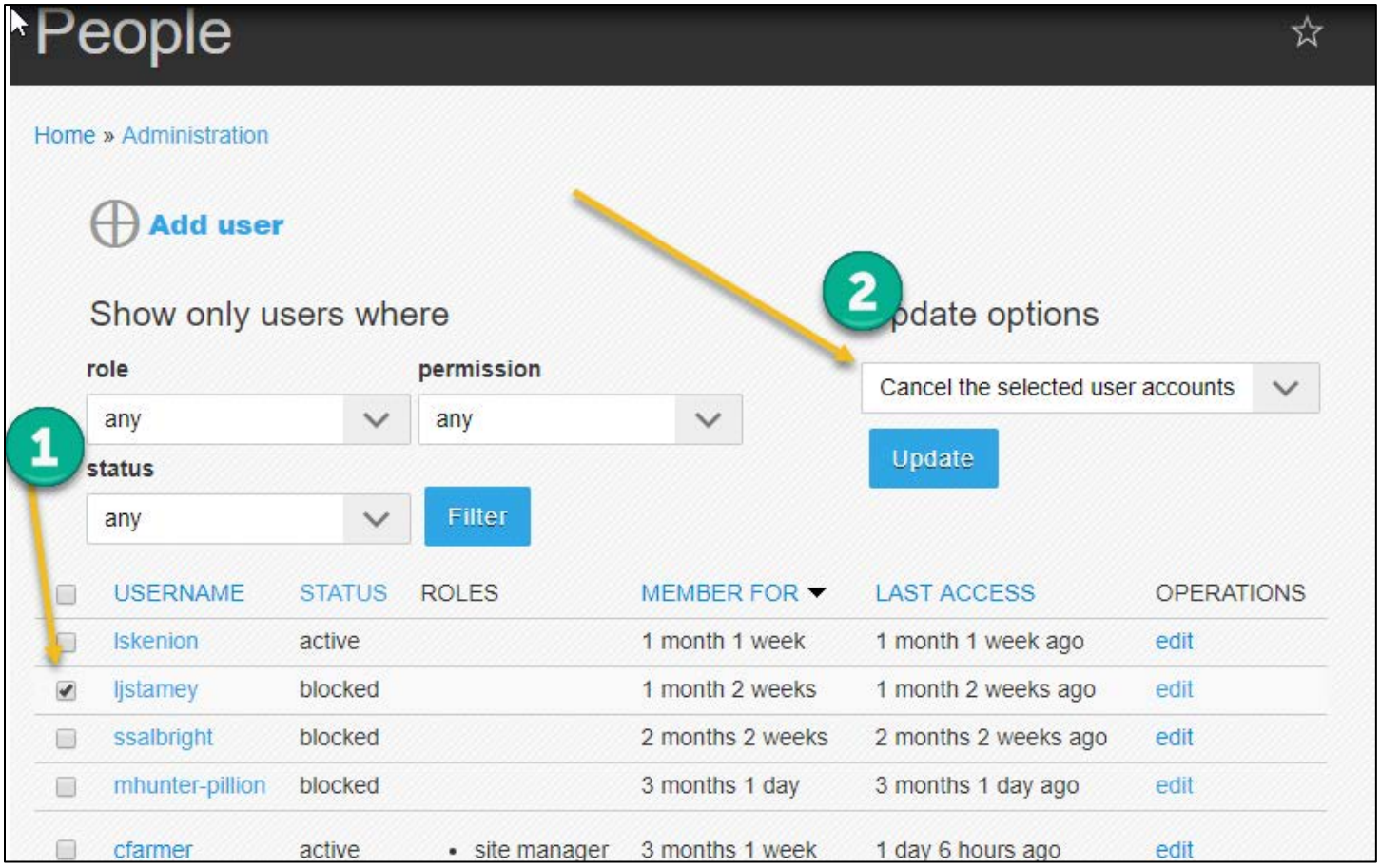
Blocking Users

If a user needs to be blocked for any reason

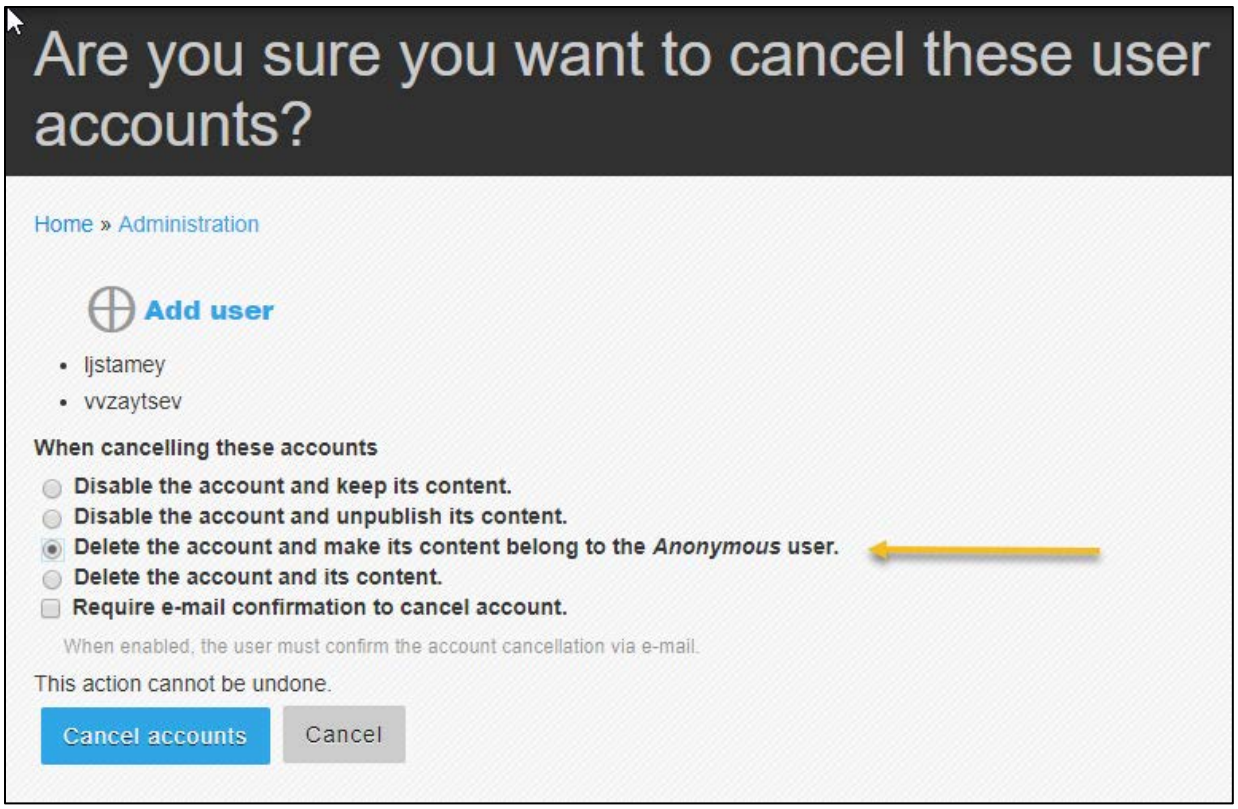
1. Go to People and find their user name, and click “edit”.
2. Block the user and click Save.
3. The user will no longer be able to log in, but will still be available to be unblocked at a later time.

Cancelling User Accounts

1. On the “People” page, click the checkbox to the left of the user name.
2. In the Update Options box (see screenshot below), select Cancel the Selected User’s Account, and then Update.



3. In the following dialogue box (see screenshot below), you will be given several options. The most common option is to delete the account and make its content belong to the Anonymous User. However, you can read the following options and may determine that another option is more appropriate. Deleting the account and all its contents is obviously a drastic choice.



New Content: Managing Menus and URLs

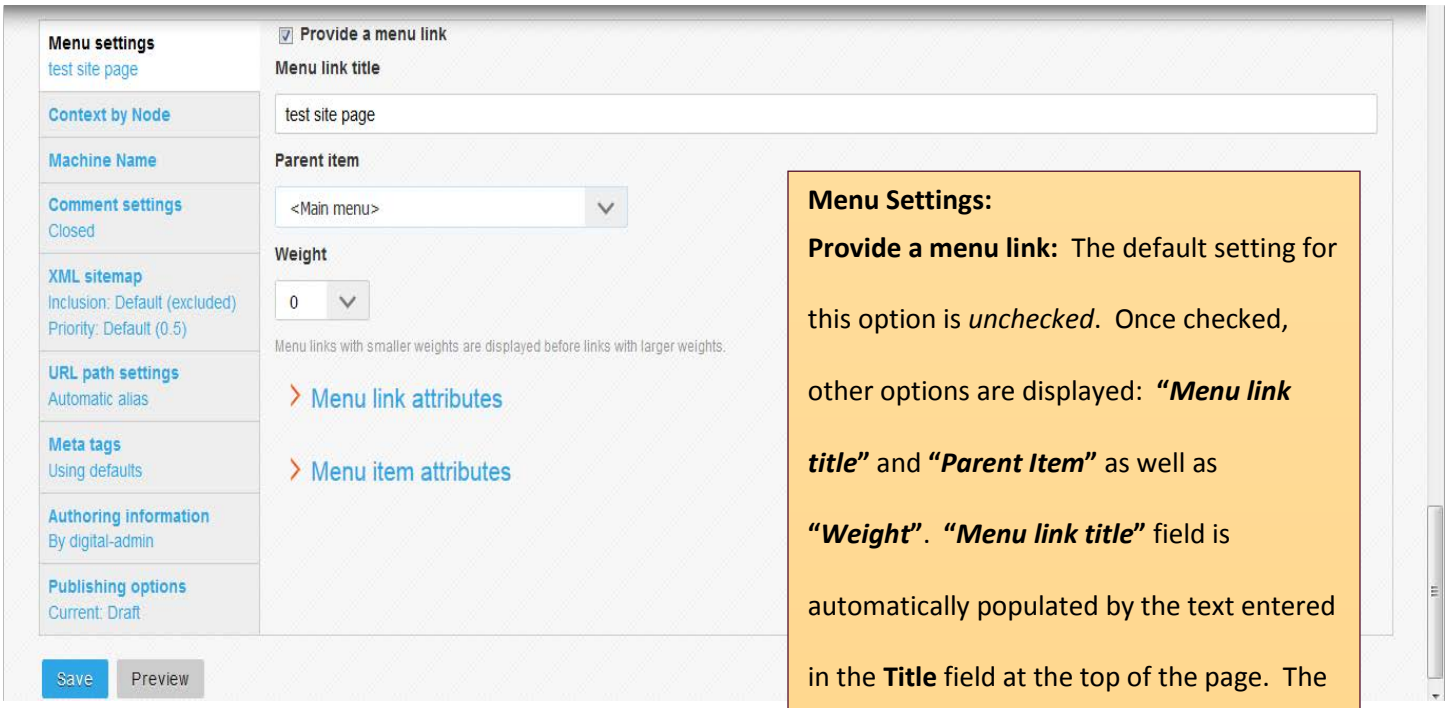
Any new **site page** should be published by a Site Administrator, not by a Publisher or a Site Manager. Only Site Administrators can place site pages in the menu. Press releases, events, documents and blogs are automatically placed into a view and no menu management is needed, so Publishers and Site Managers are able to publish them without a problem. If they publish a brand new site page, however, that page is placed into the root of the site, and bypass the structure of the site. This is very poor practice and will lead to an unmanageable site in short order.

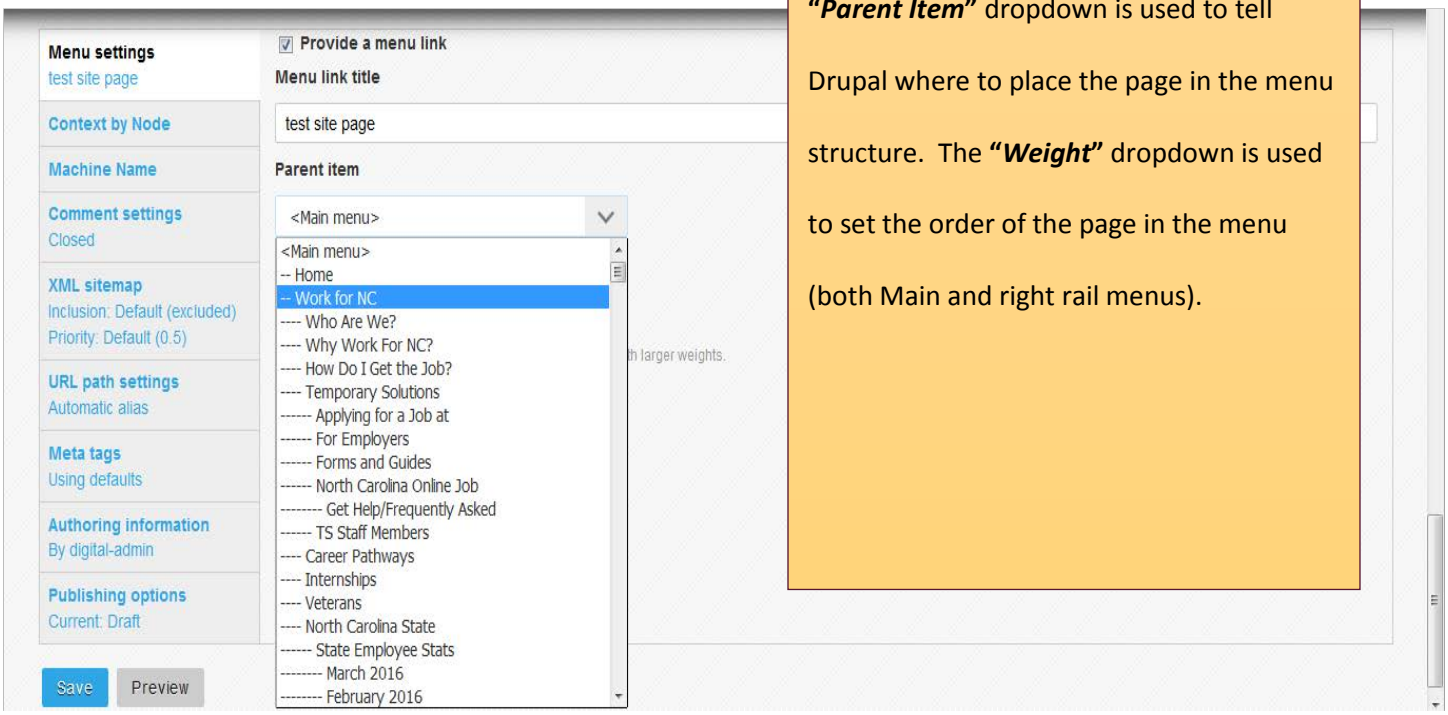
Ensure governance processes are in place so that Publishers and Site Managers do not publish new site pages.

Adding a New Page to the Menu

1. On a new Site Page, under Menu Settings, check the ***Provide Menu Link*** box.
2. The drop-down contains your entire menu structure. Select the parent item in the drop-down. It is worth your time to double-check that you have the correct location.
3. The weights range from -50 to +50, with -50 at the top because the smallest item “floats” to the top. Since at this point you don’t have visibility into all the items that this particular page is grouped with, you can leave the selection at the default, and then edit the order later. (This procedure is explained below). Doing so will put the link for this page at the bottom of the menu. If you know it should be at the top, assign -50.

Menu Settings



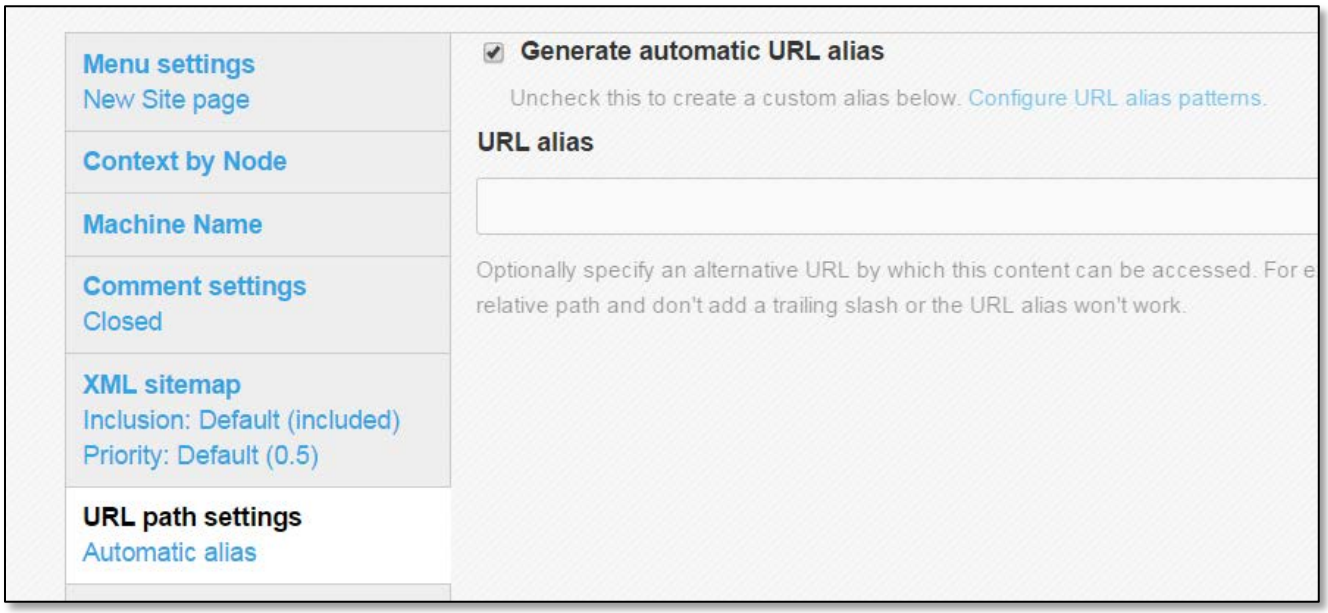


Menu Settings:

Provide a menu link: The default setting for this option is *unchecked*. Once checked, other options are displayed: ***"Menu link title"*** and ***"Parent Item"*** as well as ***"Weight"***. ***"Menu link title"*** field is automatically populated by the text entered in the **Title** field at the top of the page. The ***"Parent Item"*** dropdown is used to tell Drupal where to place the page in the menu structure. The ***"Weight"*** dropdown is used to set the order of the page in the menu (both Main and right rail menus).

URL Path Settings for Pages in the Menu

1. Under URL Path Settings, ensure the box is checked to ***Generate automatic URL alias*.**
2. When you publish the page, the URL path should match the site structure and the breadcrumb trail, as illustrated below. **If they do not match, a configuration is incorrect in the site**. Put a ticket into DIT Digital Services to have it fixed.



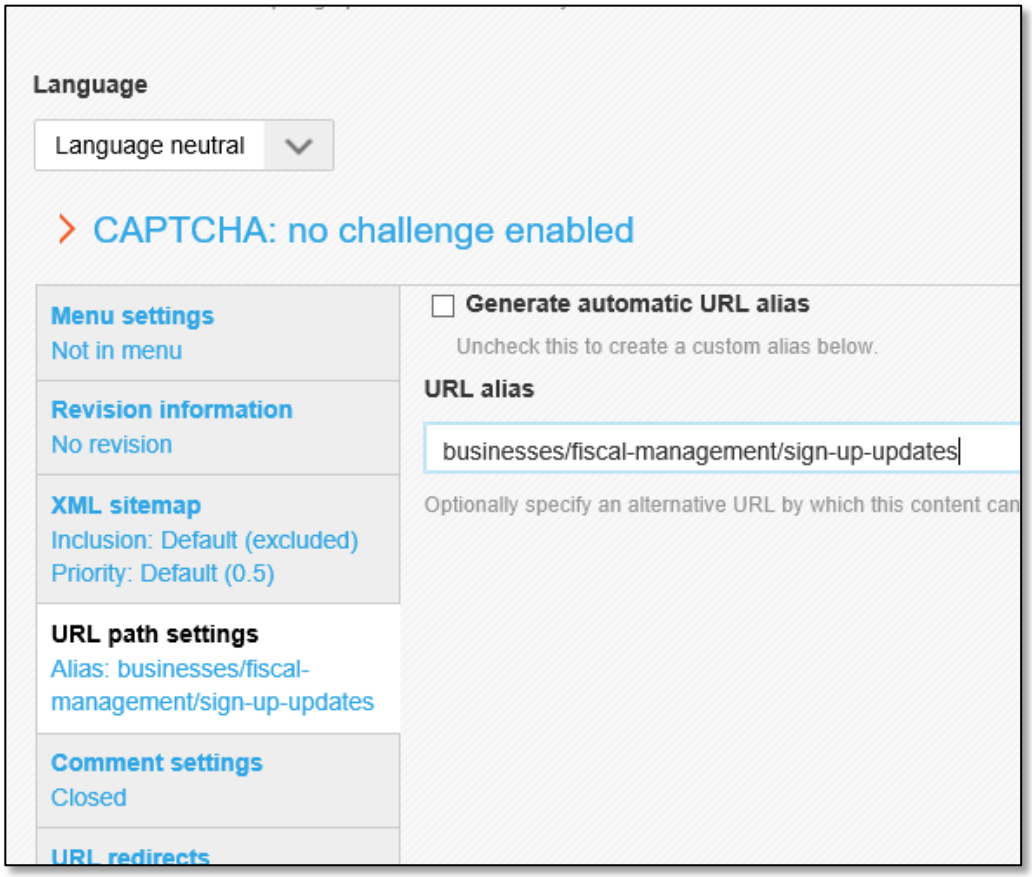
URL Path Settings for Pages not in the Menu

Occasionally a page is not placed in the menu. For example, data tables often benefit from the entire width of the page, so the right rail is not desired. In fact with data tables, the default option is **not** placing in the menu.

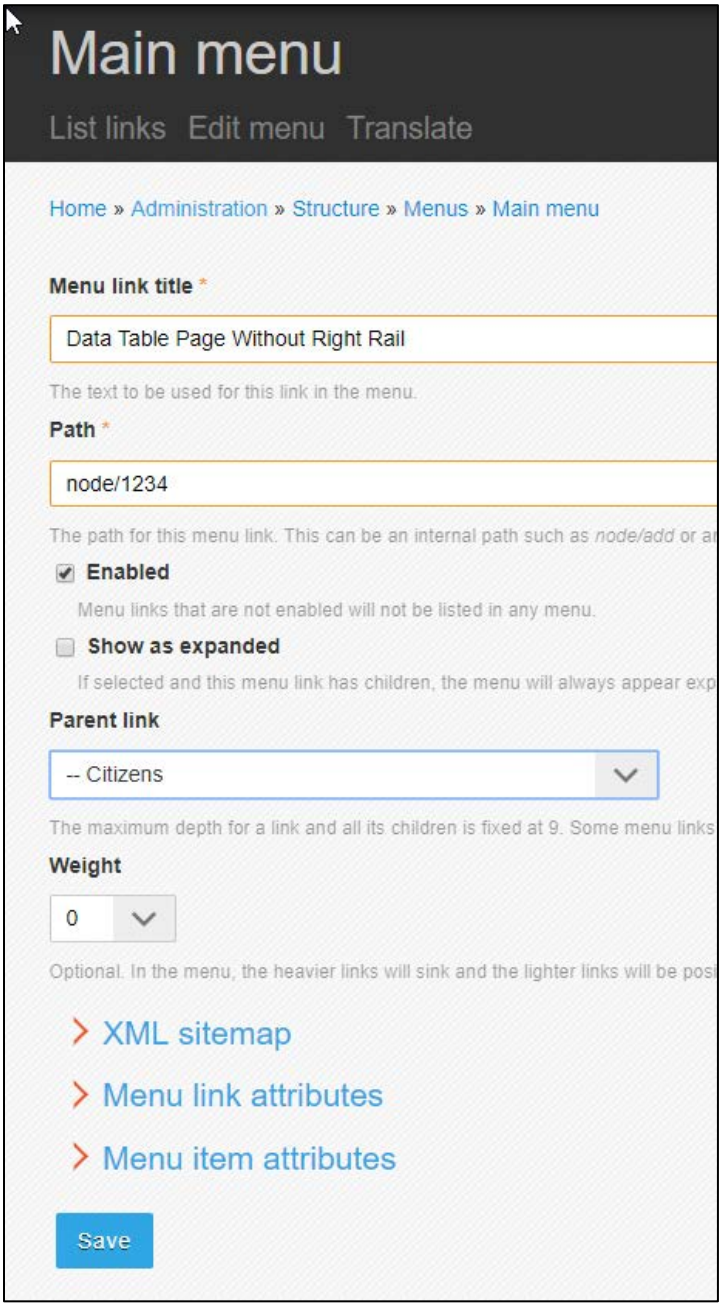
Pages that are not in the menu should still have an appropriate path, relative to their placement in the website. For these pages, do not use ***Generate automatic URL alias.*** (If it is selected for items not in the menu, the path will be at the root of the site. This is bad practice.)

Follow this procedure to provide these pages with an appropriate URL.

1. Under URL Path Settings, uncheck ***Generate automatic URL alias*.**
2. Type appropriate the path, so that it matches exactly the placement in the website.



Adding a Page to a Menu in Special Circumstances



Data tables do not normally have a right rail. If the data table needs to be in the menu, follow this procedure.

This procedure is also relevant for a page that needs to be placed in two menus. Any page can only have a single path and breadcrumb trail, but it is possible to put that page in a menu in a second place.

- For example, see the dropdown at ncadmin.nc.gov. ***State Surplus*** is in the dropdown under Citizens and under ***Government***, but has a path and breadcrumb mapping to ***Citizens***.

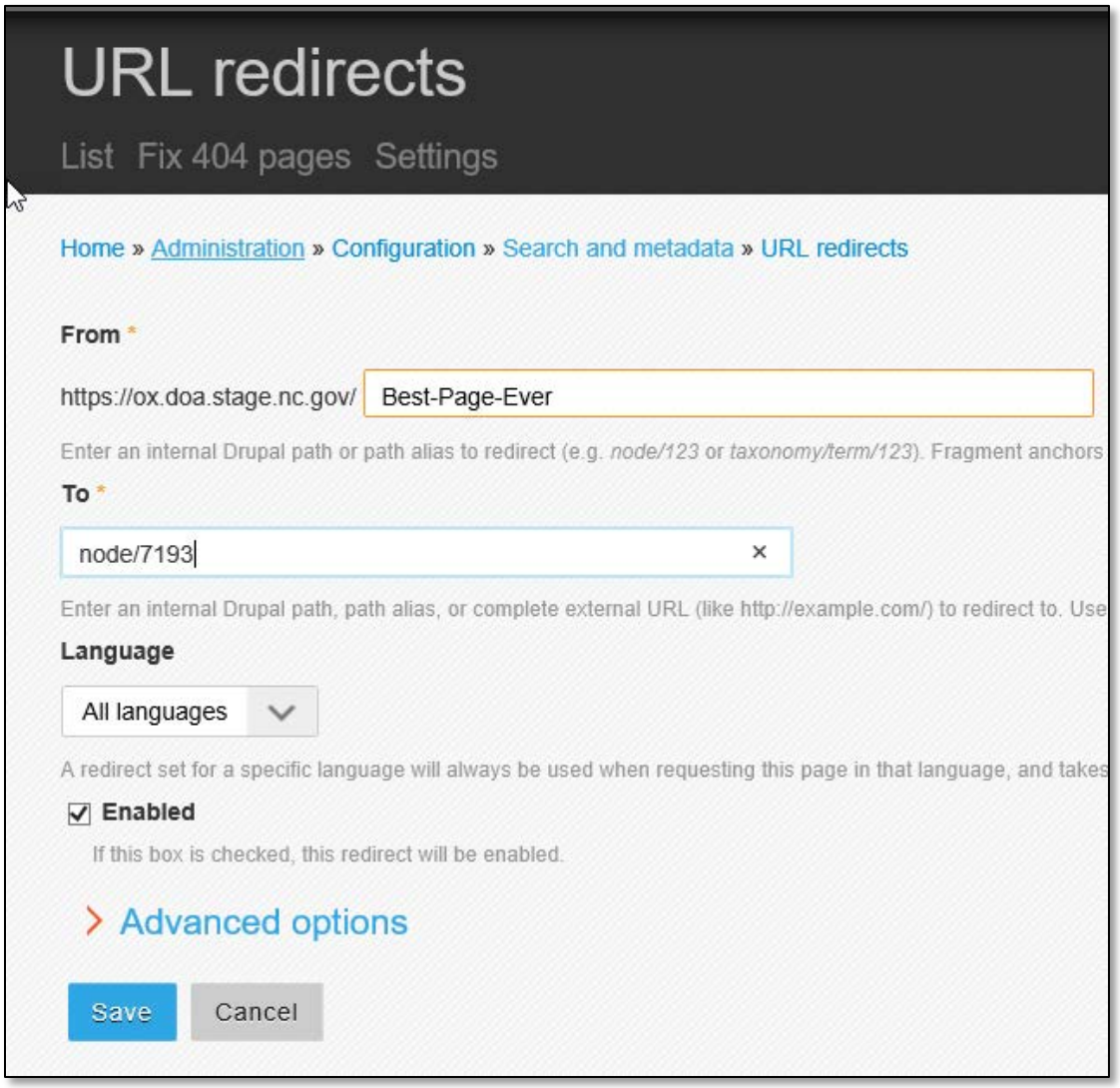
To add a data table to a menu, or to add a page to a second right rail that is not its home:

1. In the Find Content, find the page that needs to be linked. Hover over the "edit" link on the find content page. The node number will be revealed in the bottom left of your screen. Note this number. Also note the exact title of the page.
2. Go to Structure > Menu > Main Menu > List Links
3. Click Add Link.
4. Add the Menu Link Title to match the page title exactly.
5. In Path, type the node number as follows: /node/node number. For example, /node/8765.
6. Enabled should be checked but not Show as Expanded.
7. Select the appropriate parent link.
8. You can set the weight here if you know that it has to be first or last. Otherwise, adjust the new item's placement in the menu as explained in "Changing Menu Item Order" below.
9. Click save.

Friendly URLs with Redirects

If this new page is a key page, and a friendlier, shorter URL is wanted, do not make the mistake of leaving the page out of the menu structure. Instead, create a redirect.

10. After the page is published with the appropriate URL that matches the path to the page, find the node number. To do that, go to either ***My Workbench*** or ***Find Content***, and hover over the ***Edit*** link on the right side. The node will appear in the URL string at the bottom of your screen. Jot down the node number.
11. Go to Configuration > Search and Metadata > URL Redirects.
12. Select ***Add redirect***.
13. In the ***From*** field, add the shortened text for the preferred URL. In the ***To*** field, add node/[node number] such as node/1234



New Content: Metadata

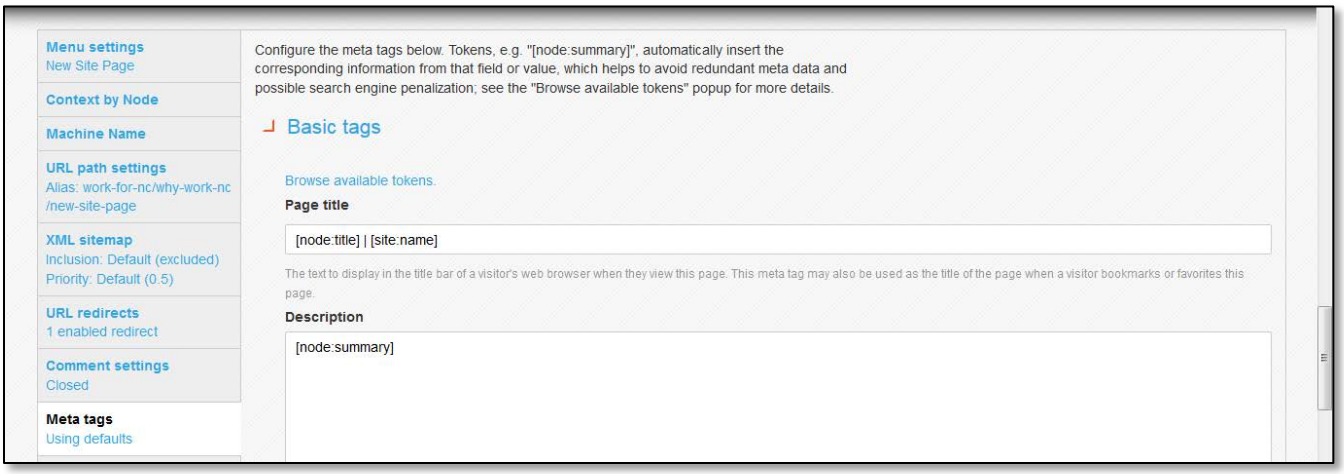
Get the metadata right when publishing a new page.

Meta Tags: Title

The Meta Tags option is important for search engine optimization. The information in your website can be found by Google and other search engines, as illustrated below.

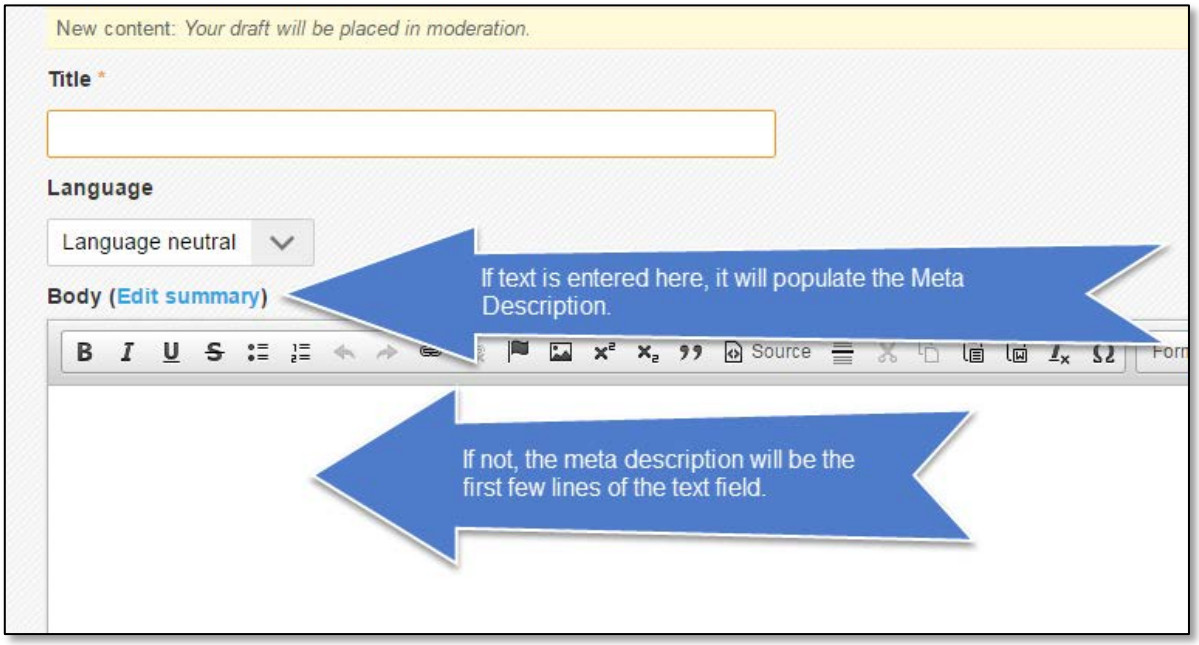
Good meta tags help surface web pages when anyone searches for it.

The page title should not have to be edited. It is automatically generated to be [site name]: [page title], as in ***NC DEQ: Air Quality,*** or ***NC DPS: Law Enforcement***. If you decide to edit it, please do follow the convention to begin with the site name, usually "NC" and the agency acronym.



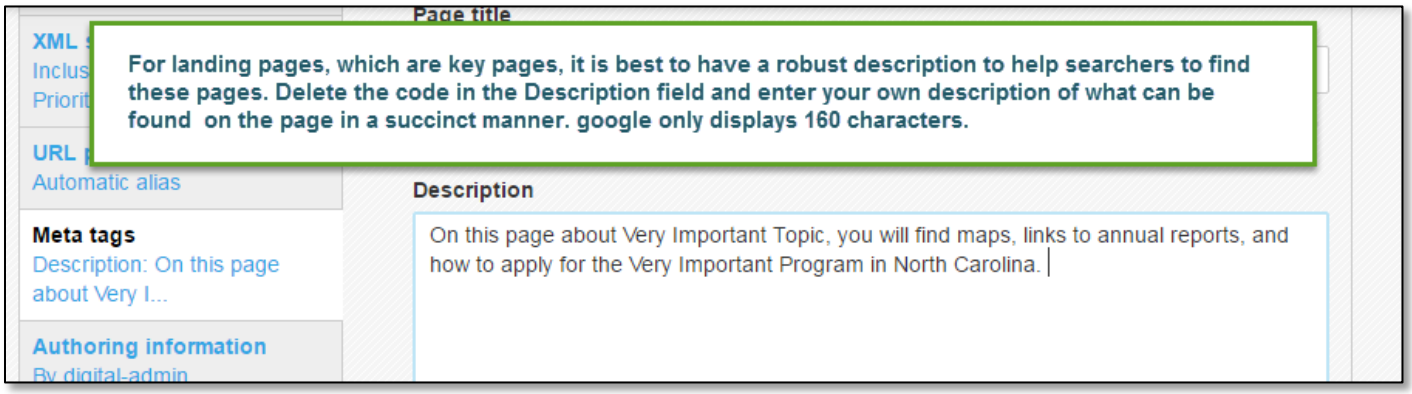
Meta Tags: Description

The Description field is configured to come from the page's Summary field. If that field is empty, the description will come from the first line(s) from the Body field. You can use the Summary field to create a succinct, relevant description that will appear in search results, which is often preferable to relying on what is in the body field.



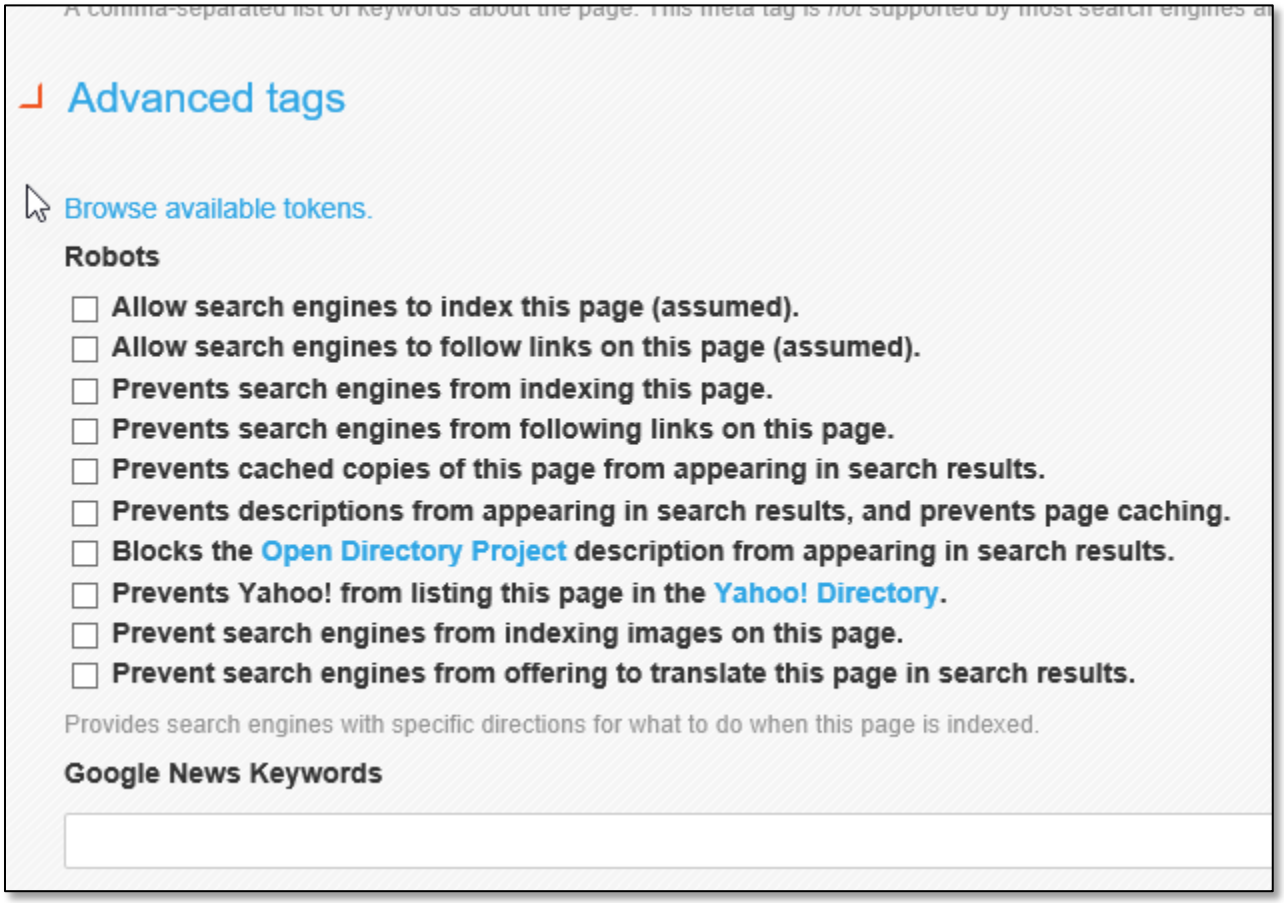
Landing Page Meta Descriptions

Landing Page is the one content type that does not use a summary field for the meta description. For Landing Pages, it is best practice to clear the token [node:summary], and type in a description of the page.



Meta Tag Advanced Tags

If you expand the Advanced tags, there are a number of options available for how search engines view the page. The "prevent" and "block" language in this area is misleading, however. Checking the box does not actually prevent all search engines and crawlers from indexing or following links, but may discourage some. If you want your page to be invisible to search engines, it is best not to publish it at all.



New Content: Optional Publishing Items

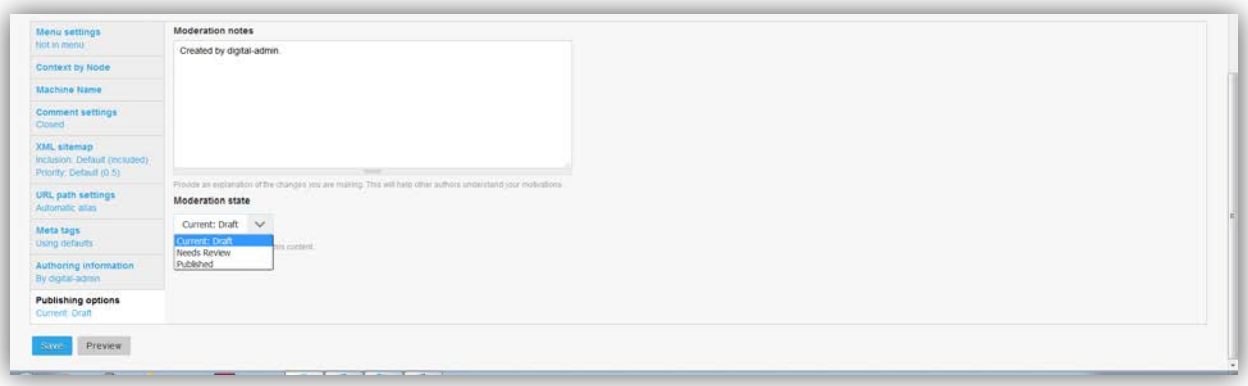
- **Context by Node:** Usually not needed. Could place an item, such as a block, in a site page.
- **Comment Settings:** Since site visitors are not asked to add comments to our pages, this is always closed. A blog could have comments, but so far none do in Digital Commons.
- **XML Sitemap:** You can control how Google sees this page in relation to your site's other pages. The default setting is .05. You have the ability to make important pages, such as your home page 1.0 and key landing pages, 0.8. You can also give outdated information that is not yet deleted a low number. Understand that this is only a suggestion to search engines.
- **Authoring Information**: Names the person who first created the page. In general, it is not edited.

New Content: Publishing Options

Moderation State

The **Publishing options** item is where you choose the moderation state for the page. ***Draft, Needs Review*** or ***Published*** are the choices. Use ***Draft*** (default) until the page is completed. Once completed and ready for review, save it as ***Needs Review***. As long as the page is in ***Draft*** or ***Needs Review*** status, the changes will not be available to site visitors.

Moderation Notes



The Publishing Options screen allows you to add ***Moderation Notes***. For example: "changed the contact information" or "added 2016 data." The person making the updates is automatically added here. The editor and any information added appears under the ***Moderate*** tab.

When you click the ***Moderate*** tab, you get a view of all the changes made to the page since its creation. In the ***Moderate*** screen below, you can see the *History of the New Site Page*. The most recent action is listed at the top in green. The first creation of the page is listed at the bottom. You can **view, revert or delete** any of the Revision Actions.

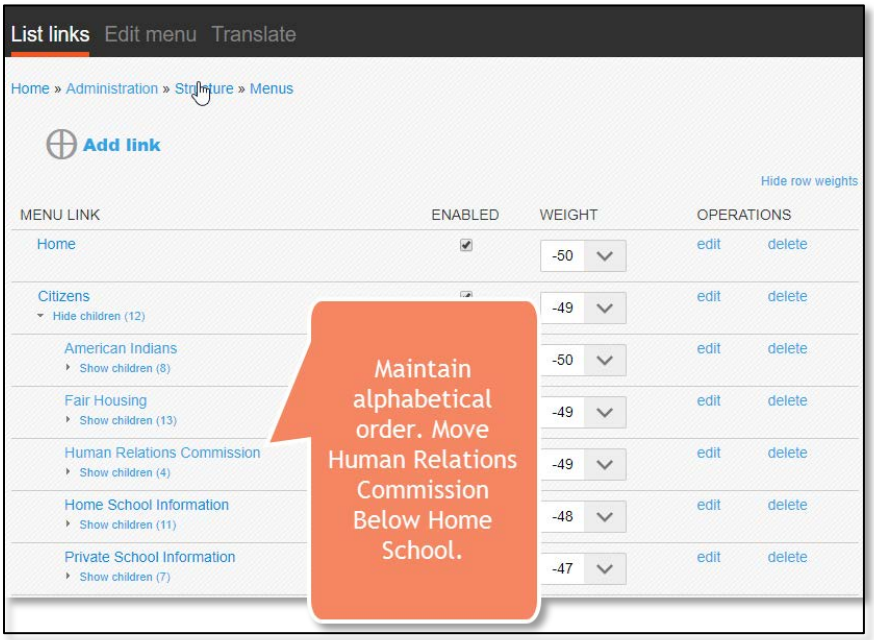
Changing Menu Item Order

You can specify the "weight" of a new page in the menu upon saving, but there are times when several items need to be reordered in a menu.

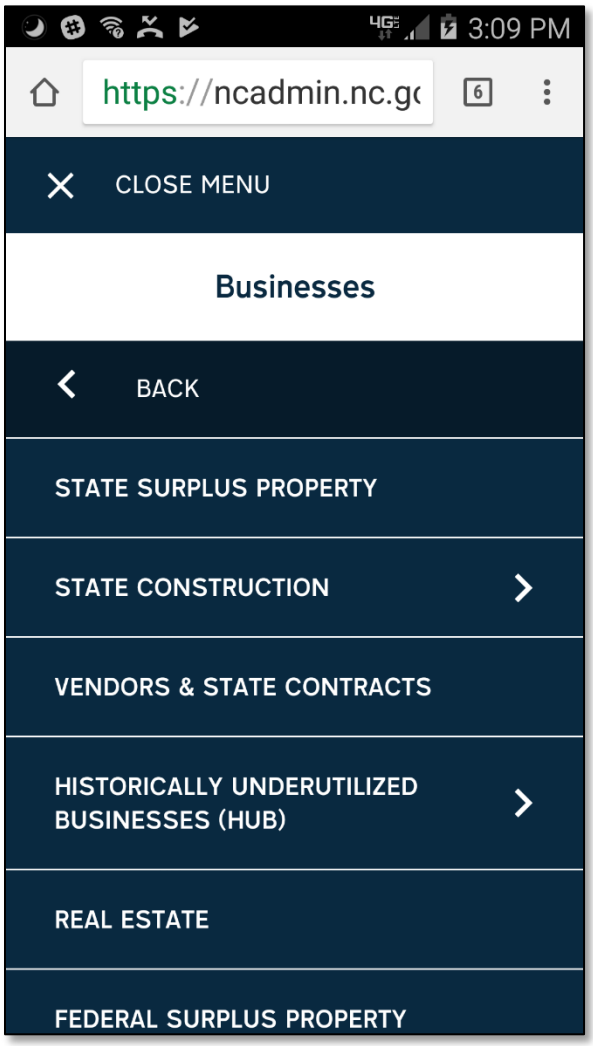
Menu items are often in alphabetical order, but not always. Sometimes there is a logical order, such as in a procedure. And sometimes, in a menu of several items, the audience needs one item much more often than the others. Placing it on top makes your website more usable to your site visitors.

In the example here, alphabetical order is wanted, so Human Relations Commission needs to be placed underneath Home School Information.

1. Go to Structure > Menus. Find ***Main Menu***. Select ***List Links***.
2. Navigate to the place where you need to reorder the items.
3. There is a drag and drop option, but the safer, preferred method is to use Row Weights. If row weights are not showing, select ***Show Row Weights***. (With the drag and drop option, it is easy to change the level of items in the menu, and not always easy to put them back.)
4. Row weights for menus start at -50 as the highest weight, and end in +50. The logic is that the smallest number "floats" to the top. If numbers you assign are all consecutive, there is no room to space them out if you add a new item in future. Separate their weights by increments of 5 or 10. In the example below, where Human Relations needs to be placed below Home School Information, the bottom item, Private School, could be given a weight of -10. Human Relations could be given -20, and the rest left as is.



Mobile Menu Management



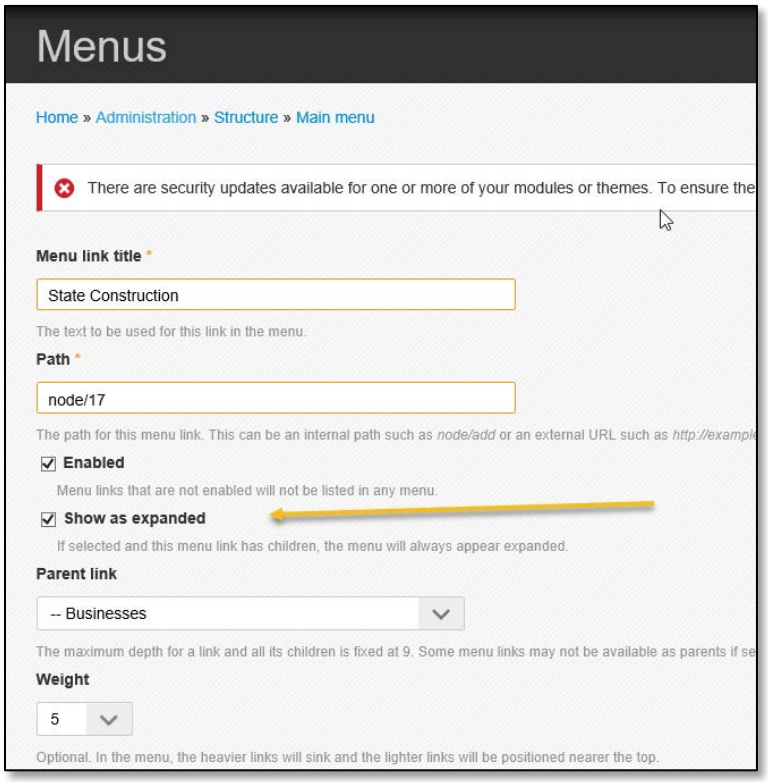
Large menus with many layers are difficult to navigate on a mobile device. While mobile users often rely on your search functionality to find what they want, usable menus are appreciated.

To the left is an example of a Digital Commons site's navigation on a mobile device. In the example, the site visitor selected "Businesses" from the mobile menu, and is currently at a level 2 in the menu. The default behavior is for no further items to be expanded. Default behavior can be seen for the items with no arrow indicating a deeper menu.)

For those items without the arrow, they will be taken to the landing page for that section.

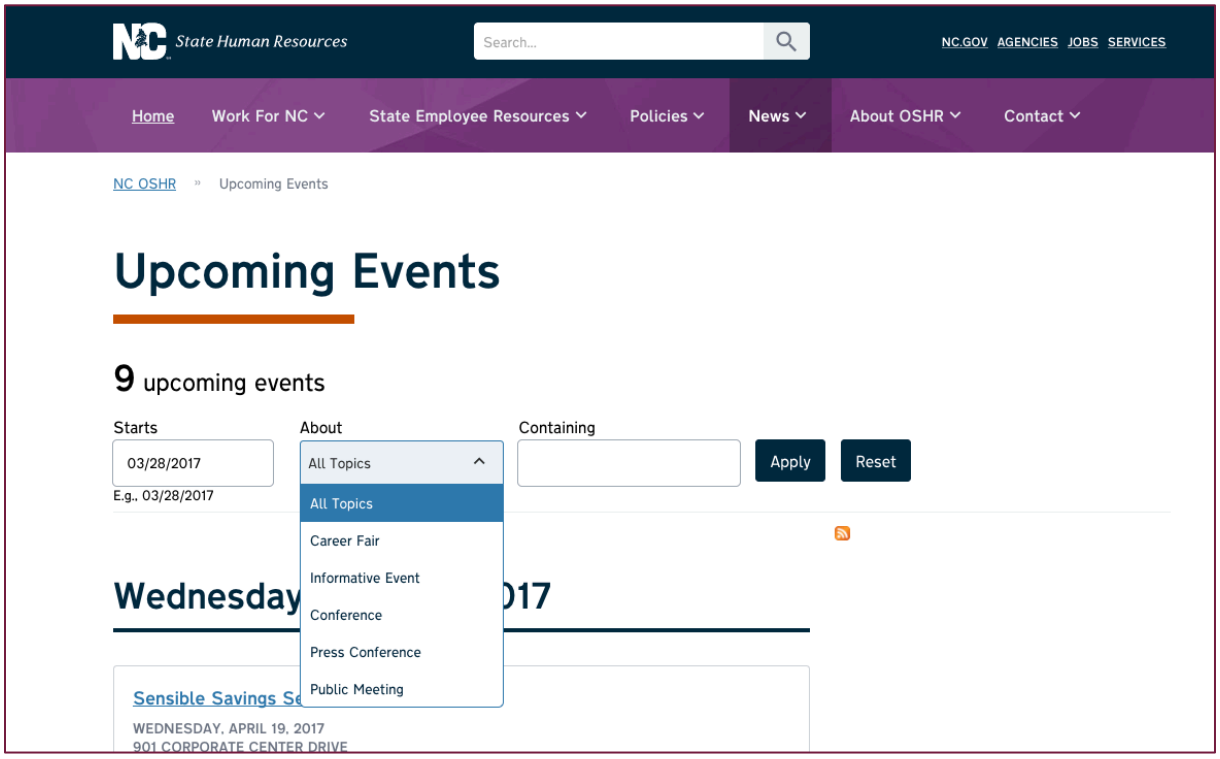
For the items with the arrow, they will skip the landing page and get a list of all the child items at level 3. This is a friendlier interface for mobile users who want to drill down quickly to needed content. The drawback occurs when important content exists on a landing page; the mobile user will not see it.

1. To increase the depth of your mobile menu, go to Structure > Menu > Main Menu. You are looking at level 1 in the menu.
2. Show children for a menu item to reveal level 2. For an item on level 2, select ***edit*** on the right of the screen.
3. Check the **Show as Expanded** box.



Taxonomy

Content can be classified using ***taxonomy***, which might also be called ***vocabulary***, ***categories*** or ***terms***. All views (dynamic content) can have taxonomy: press releases, events, documents and blogs. The site visitor encounters taxonomy in filters.



Each type of view has taxonomy built into it.

- Blogs have categories and terms
- Documents have collections and terms
- Events have organizer, terms and type
- Press releases have terms

Any of these views can also have the Counties vocabulary and/or the Department/Agency vocabulary. Department/Agency is usually where agencies include their divisions and offices.

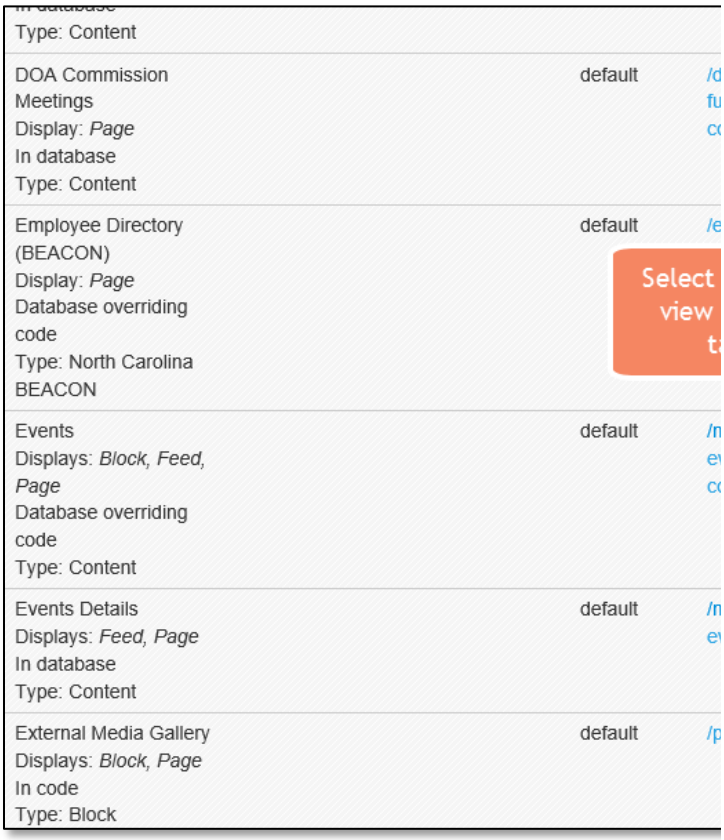
My Workbench | Dashboard | Content | Structure | People | Configuration | NC Permissions | Reports | Help

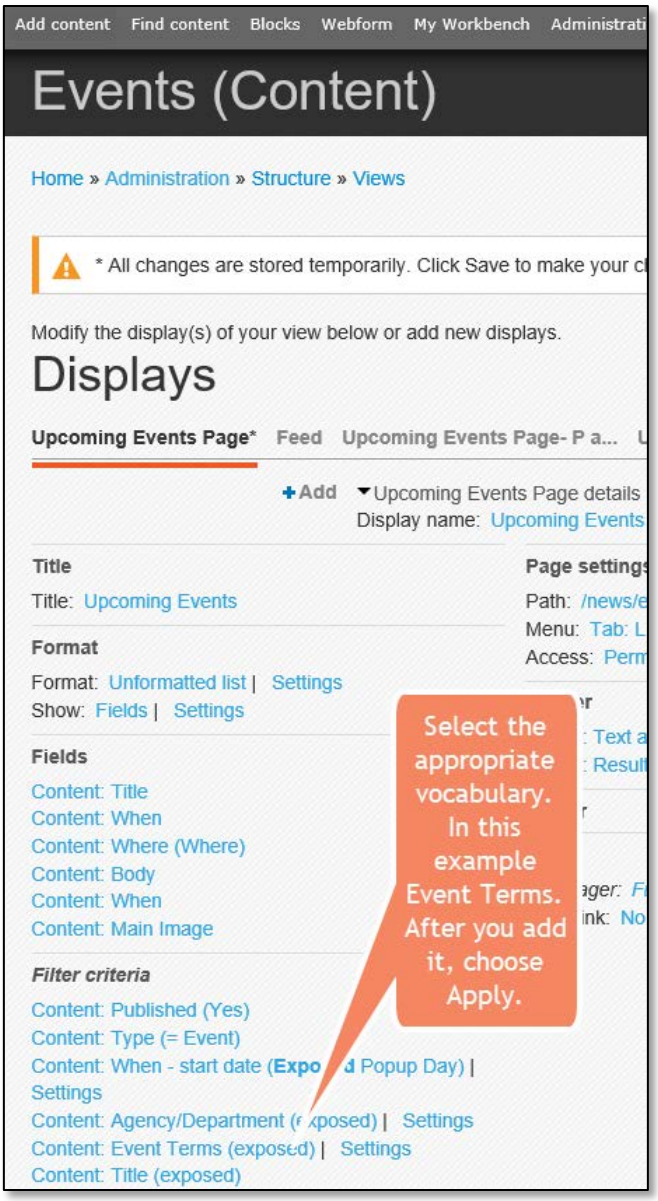
Add content | Find content | Blocks | Webform | My Workbench | Administration | Administration | Edit

VOCABULARY NAME	OPERATIONS		
Agency/Department	edit vocabulary	list terms	add terms
Blog Category	edit vocabulary	list terms	add terms
Blog Terms	edit vocabulary	list terms	add terms
Card Keywords	edit vocabulary	list terms	add terms
Document Collection	edit vocabulary	list terms	add terms
Document Terms	edit vocabulary	list terms	add terms
Event Organizer	edit vocabulary	list terms	add terms
Event Terms	edit vocabulary	list terms	add terms
Event Type	edit vocabulary	list terms	add terms
Key Search Topics	edit vocabulary	list terms	add terms
North Carolina Counties	edit vocabulary	list terms	add terms

Update an Existing Taxonomy

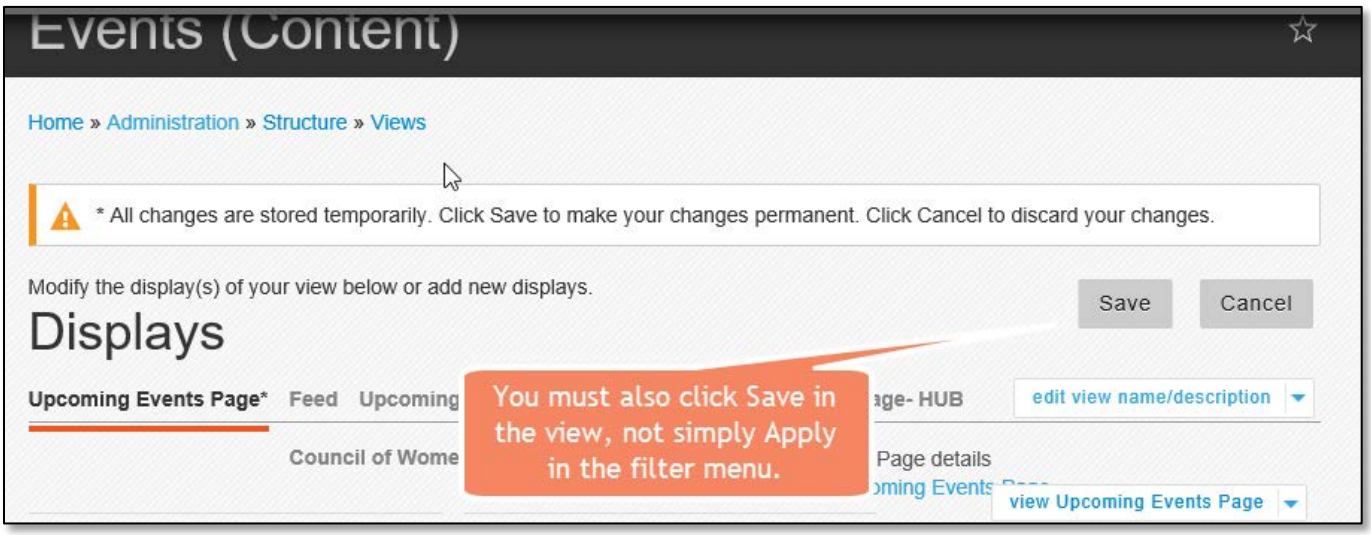
1. Go to Structure > Taxonomy and select the appropriate vocabulary.
2. Review the items in List Terms. You can edit them here as well.
3. Add a new term under Add Terms.
    - This will make the term available/selectable in the content type. It will not yet, however, be available in the dropdown that the site visitor sees. Steps below will make it available in the dropdown.
4. To add the new term in the dropdown viewed by the site visitor, the view itself needs to be edited. Go to Structure > Views.
5. Find the view and select ***edit***.





6. Select the appropriate vocabulary within that view. In the example on the right, it is the ***Event Terms***.
7. Holding the CTRL key down, select the additional term you want added to the dropdown. (The CTRL key allows for multi-select; you will unselect the rest if you don't use it.)
8. Select Apply. **Be aware the new item is not yet saved.**
9. Select Save in the View.

10. Check the appropriate dropdown to view the new taxonomy term.



Planning Taxonomies

Adding taxonomies is quite simple but we will caution you to invest some thought when creating new vocabulary and its purpose. Once it is associated with content on the site it might prove cumbersome to delete the taxonomy. Create a wireframe on how the taxonomy will look and what type content you will have associated. You will thank yourself later.

Add a New Vocabulary

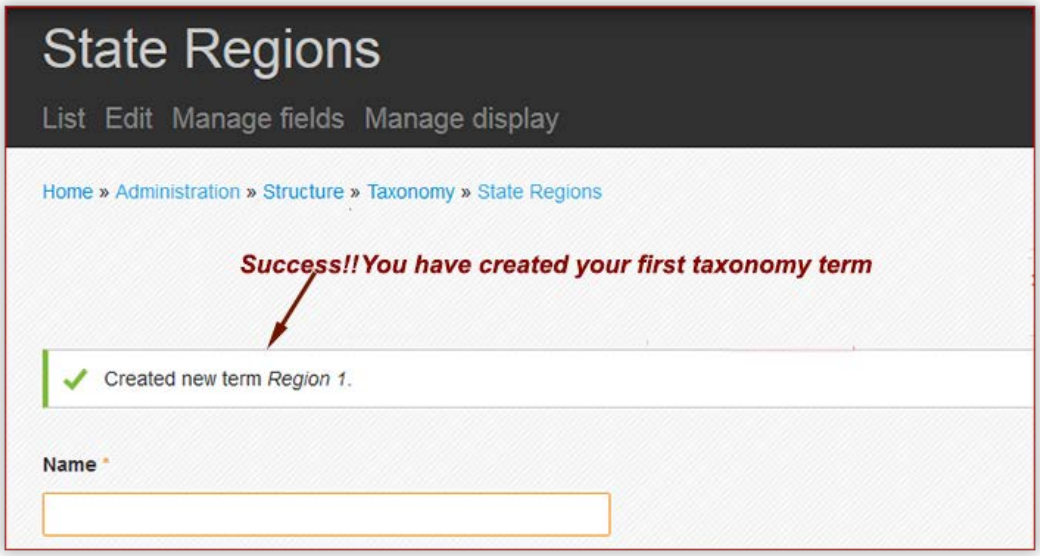
While there will be vocabularies already created by default, there will be instances when you will need to add your own custom vocabularies (groups of taxonomies terms) and add terms. Here are the steps to do that.

1. On the admin bar click **Structure**, then scroll to near to bottom of the page and click **Taxonomy**. This will open the taxonomy page where you will add your custom vocabulary and taxonomy terms.
2. Click **Add vocabulary**. You will see a blank field for you to create your new Vocabulary. Type your vocabulary term in the field. This example we named it State Regions

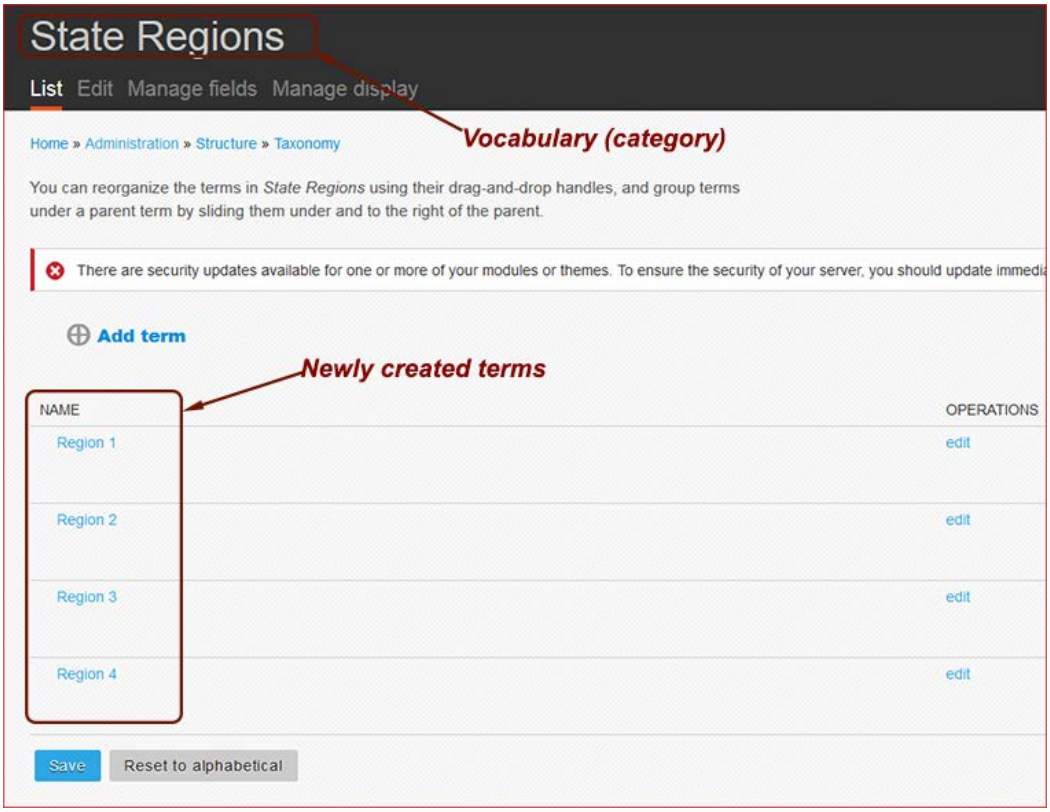
NOTE: At first look, there are a lot of fields to complete. Don't fret, the only you will use is the Name field for you to add a taxonomy term. Everything under the Term microdata settings and XML sitemap will be left as is.

3. Click the blue **Save** button at the bottom. You have created the Vocabulary, now you can associate terms with the vocabulary you created.
4. Now we need to add terms to associate with new Vocabulary (category) we just created.
5. Locate your newly created category (in this example **State Regions**). On the far-right side of the page click **add terms**. An **add terms** page appears.

6. In the Name field, type the name of the term you want to associate to the vocabulary (State Region). This example, we will call this one Region 1.
7. For now, scroll to the bottom of the page and click the blue **Save** button. You will see an alert saying Created new term (whatever you name the term).



8. Add all of the terms to be associated with the Vocabulary. My example I added *Region 2, Region 3, Region 4.*
9. On the black menu bar, click **List**. This will display your vocabulary and display a list of all of the associated terms. See image below



You have just completed adding your custom Vocabulary.

Best Practices in All Page Creation

Styles in the Text Editor

- Headings in the Text Editor are in the correct outline order (heading 2 is first, subtopics within heading 2 are heading 3, sub-subtopics within heading 3 are heading 4, etc.). Do not skip heading numbers, or use simple bold for heading text.
- Paragraph text is “normal.” All text is spell checked.

Formatting in the Text Editor

- Clean formatting: No formatting was inadvertently added (font tags, div tags, formatting tables). If something looks funny, cut it and then paste using the "paste as plain text" icon.

Links in the Text Editor

- They each work.
- They each have a descriptive label, not simply "click here" or "learn more."
- The link label matches its destination page title closely.
- If the link goes to a page within the site, ensure it is relative, not absolute. Relative links do not include the domain; they begin after the first slash.
    - Absolute link: http://www.nc.gov/government/our-government
    - Relative link: government/our-government

Images in the Text Editor

- Alt text is entered and is descriptive.
- The image is appropriate and is an appropriate size.
- Your agency has the rights to publish this image, and is tracking that information.
- Inline images should be sized at 320 pixels or less before they are brought into the website, and then aligned either right or left.
- Images greater than 320 pixels should be on their own line, and aligned left. Do not use a caption for an image greater than 320 pixels, because the caption will break the scaling.

Summary Text

- It is a best practice to add summary text at the time of publishing a page. (All content types except landing pages have a summary content field.) This field creates a meta description, which search engines use to describe a page to searchers. For items in a view (press releases, documents, blogs and events), the summary does double duty: it appears on the view page.
    - Keep it short: 155 characters.
    - Write in complete sentences.
    - Use terms that searchers might use when they need this page.
    - **Do not duplicate meta descriptions:** Meta descriptions should be unique for every page.
    - Don’t include quotation marks.

Best Practices for Related Content in New Pages

- **Main image**: Use main image when you want to add interest to a site page, document, press release or event. Is there an image in the text editor that should instead be the main image?
- **Files/Attachments**: If the files or attachment field is used, check the link, and also the title. If the title is the filename, is it appropriate?
- **Related Content**: Use this field to bring attention to other content in your site that is related, as well as to off-site content. If linking within your own site, ensure the links are relative, not absolute.
- **Metadata**: Metadata is entered when the page is built. When a page is edited, it's good practice to ensure the metadata are appropriate.
- **Key Search Topics**: The Key Search Topics field should be used very sparingly. It will push a page to the top of the site's search results for any given word or phrase entered. Use it in two ways:
    - When a certain page must rise to the top of search results and it is not doing so. For example, a section of your site is about Very Important Topic. When a site visitor searches for Very Important Topic, search results sometimes float less important pages to the top. You can place one or several phrases into Key Search Topics to make it rise to the top.
    - When a certain page of your site is about a topic that your organization calls one thing, but your audience calls another. For example, the public searches for "bird flu" and your web page is named more scientifically "H1N1 Flu".

Drupal Terms

- Blocks – Blocks are content elements in landing pages or on the sidebar regions of your website. They can be cards, such as call-to-action cards (CTA cards, which are colorful cards with icons) or article cards (containing an image above the link). Quick links can be displayed in a block. Sidebar menus are in blocks, and a Twitter feed is often displayed in a block on a landing page or footer.
- Carousel, Slider, Banner – These three names are used interchangeably for a full width block created using the "carousel" block type. A slider and a carousel have multiple slides. A banner is just a carousel that only has one image.
- Content Type - In Drupal, each item of content is called a node (see below), and each node belongs to a single content type. Most of the time different content types have different data fields, layouts and work flows associated with that content type.
- Landing Page - A content type in the Digital Commons sites, used for home pages and often for the first page in a section of content. Landing pages have more flexibility than other content types. They contain a combination of various blocks, cards, bands and banners linking site visitors to deeper content.
- Modules – Drupal is powered by thousands of software projects called modules. These software modules can plug into your site and provide enhanced functionality.
- Node – The node is your core unit of storing content. If you're inputting and saving content, you're probably saving it as a node. A page is a node. A block is a node.
- Right Rail - Many content types in Digital Commons sites have a sidebar menu in the right. We call that the right rail.
- Taxonomy - A taxonomy is a collection of organizational keywords known in other systems as categories, tags, or metadata. It allows you to connect, relate and classify your website’s content. It can help a "view" to function (see below).
- Text Editor/WYSIWYG - "What You See Is What You Get". The part of a Drupal form where the user can enter text using paragraphs, bullets, and tables. Imagery can also be added.
- Views - A list that is created dynamically. When you enter a new press release using the Press Release content type, it is automatically entered into your Press Release page. That page with all the press releases is a view. When you use the "event" content type, your calendar will be fed automatically; that is another view. Documents are often in views as well. Views often rely on taxonomy.