Digital Commons Overview Training

**Audience:** All new to the platform, all roles Editors, Publishers, Site Admins and Site Managers.

**SUMMARY:** Training to help new users of the NC Digital Commons Platform to log in and create pages, including site pages, events, press release, documents, and blogs; learn about views (dynamic lists); the use of text editor/WYSIWYG; and some tips for managing content.

**Contents**
Digital Commons Introduction......................................................................................................................3

User Roles ..................................................................................................................................................4

Content Types ..........................................................................................................................................5

  Blocks / Cards ...........................................................................................................................................6

  Carousel / Slider / Banner .......................................................................................................................6

  Site page with Right Rail .........................................................................................................................7

  View.......................................................................................................................................................7

Taxonomy / Vocabulary / Categories / Terms ............................................................................................8

Text Editor / WYSIWYG ............................................................................................................................8

"What You See Is What You Get" ...........................................................................................................8

Logging In ................................................................................................................................................10

  First Log In ...........................................................................................................................................10

Administrative Toolbar ..............................................................................................................................11

Creating Content – How to start .............................................................................................................11

Site Page Content Type ............................................................................................................................12

  A Published Site Page ............................................................................................................................13

Revision Information ................................................................................................................................14

Text Editor / WYSIWYG ............................................................................................................................14

  Best Practices for Styles in the Text Editor ............................................................................................14

  Links in Text Editor ................................................................................................................................15

  Best Practices for Links in the Text Editor ............................................................................................15

  Images in the Text Editor .......................................................................................................................16

  Best Practices for Images in the Text Editor ..........................................................................................16

  Add a Video within the Text Editor ........................................................................................................16

Press Release ...........................................................................................................................................18
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document</td>
<td>18</td>
</tr>
<tr>
<td>Event</td>
<td>19</td>
</tr>
<tr>
<td>Managing Content</td>
<td>20</td>
</tr>
<tr>
<td>When a Page is Ready to Publish</td>
<td>20</td>
</tr>
<tr>
<td>Finding Content</td>
<td>20</td>
</tr>
<tr>
<td>Workbench</td>
<td>20</td>
</tr>
<tr>
<td>Saving and Moderation</td>
<td>21</td>
</tr>
<tr>
<td>Best Practices in All Page Creation</td>
<td>22</td>
</tr>
<tr>
<td>Styles in the Text Editor</td>
<td>22</td>
</tr>
<tr>
<td>Formatting in the Text Editor</td>
<td>22</td>
</tr>
<tr>
<td>Links in the Text Editor</td>
<td>22</td>
</tr>
<tr>
<td>Images in the Text Editor</td>
<td>22</td>
</tr>
<tr>
<td>Drupal Terms</td>
<td>23</td>
</tr>
</tbody>
</table>
Digital Commons Introduction

“Digital Commons” is a website platform consisting of dozens of websites that have a unified look and feel, so that citizens get a unified and secured experience on state government agency websites. Websites are secure, mobile optimized, and accessible to people with disabilities.

To better understand your website, refer to the graphic below.

- The first foundation, the bottom layer in the graphic, is the Drupal Content Management System (CMS). Drupal is a powerful CMS that is used by many government offices at the federal, state and local level and around the world. It provides our websites with powerful functionality to organize, structure, find, and reuse content.

- The NC Digital Commons environment, the second layer, contains the customizations specific to North Carolina government websites: responsive design with the ability to easily create and maintain content.

- Each individual website has all of the advantages of the platform and environment. For example:
  - Posting a press release can be done by anyone who can fill in an online form. It is then automatically placed in a press release “view” (dynamic list).
  - Posting an event to the calendar has a separate online form. It automatically expires when the event is in the past.
**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.

<table>
<thead>
<tr>
<th>Roles/Permissions</th>
<th>Create &amp; Publish Calendar Events</th>
<th>Create New Content</th>
<th>Edit Content</th>
<th>Save as Draft or Needs Review</th>
<th>Publish Content</th>
<th>Create Blocks</th>
<th>Manage Landing Pages</th>
<th>Manage Webforms</th>
<th>Manage Menus</th>
<th>Administer Users</th>
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Content Types

A template with defined fields, to display content consistently.

**Event**
A single item in the calendar, including details of date, time, and location.

**Press Release**
The press release template has the city, date, and contact information for the media.

**Document**
A file attachment, such as a Word doc, PDFs, or Excel. The document content type allows these documents to be filtered in “views” (see below).

**Site Page**
A basic page
**Blocks / Cards**

The terms *blocks* and *cards* are used interchangeably. This content can be placed on landing pages and below the right rail.

**Article Card**

![Article Card Image](image1)

*Shared Services Center Statistics*

**Event Card**

![Event Card Image](image2)

*NC State Capitol Behind The Scenes Tour*

RALEIGH, NC

NC STATE CAPITOL

**Call to Action (CTA) Card**

![Call to Action Card Image](image3)

*See More Videos*

Follow our YouTube channel for the latest video content on topics in health and human services.

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**Carousel / Slider / Banner**

This is a kind of block or card that is full-width. It contains one or more images. The terms *carousel* and *slider* are used interchangeably. With a single image, the same feature is called a *banner*.

![Carousel Image](image4)
**Site page with Right Rail**

For pages with a side menu, the name for the right side of the page.

![Employee Relations](image)

The Employee Relations Division is dedicated to supporting State of North Carolina government agencies and universities in maintaining employer-employee relationships that enhance productivity, communication, and problem solving.

OSHHR provides guidance and information to agency and university staff on:

- Disciplinary actions
- Grievance process, including management of:
  - Mediation
  - Settlement/resolution agreements

**View**

A dynamic list of content. Certain content types, such as events and press releases, once created and published, will be added to the list automatically.

**Event View**

![Upcoming Events](image)

**Press Release View**

![Press Releases](image)
Taxonomy / Vocabulary / Categories / Terms

Content can be classified using taxonomy, which can also be called categories or terms.

Text Editor / WYSIWYG


The part of a Drupal form where the user can enter text using paragraphs, bullets, and tables. Images can also be added.

Heading 2

When in the Course of human events it becomes necessary for one people to dissolve the political bands which have connected them with another and to assume among the powers of the earth, the separate and equal station to which the Laws of Nature and of Nature's God entitle them, a decent respect to the opinions of mankind requires that they should declare the causes which impel them to the separation.
Using Your Digital Commons Site
Logging In

To create or edit content on your website, you must have a registered username and password. The NC Digital Commons platform has been set up to recognize your NCID. The same credentials you use to log into any other NC system will allow you access to your website.

First Log In

For first time Log In navigate to the URL provided to you (e.g., “your-site-name.nc.gov/user”) and enter your NCID username and password.

To log in to the CMS, navigate to the URL provided to you (e.g., “your-site-name.nc.gov/user”) and enter your NCID username and password.

At this point you have no user role and thus no ability to edit or create content. Your website manager must assign a user role to you.

After your site manager has assigned a role to you, when you next log in you'll see your role displayed on the user page, and you'll see the Administrative Toolbar at the top of every page.
Administrative Toolbar

The items on the Administrative Toolbar depend on your user role. If you are logged in as an Editor, you will see a toolbar with shortcuts to create and edit site content.

For an Editor, the top black toolbar contains the following items:

- **Home**: The house icon links to the front page of the website.
- **My Workbench**: A dashboard for you to access your content; also provides search tools and special views on your content.
- **Content**: Add new and search for existing site content; while an Editor user is able to view all site content, you are only able to edit content items owned by other Editors.
- **Hello <current user>**: Takes you to your account options and settings, as well as to the file browser.
- **Log out**: Ends your session Other roles see more options.

Under the top-level toolbar, you will see a lighter gray “Shortcut” bar. This bar has shortcuts to the most common tasks you’ll need to perform on the site:

- **Add content**: See a list of the types of content you can create, such as Events and Site Pages; this list reflects the privileges assigned to your user role.
- **Find content**: Sort content by its type and publication status; use this feature for a general view of site content.

Creating Content – How to start

This document covers these content types:

- Site page
- Press release
- Document
- Event
1. **Title**: The first element of a site page is its title. Notice the asterisk (*) and the outline of the field in orange. This means it is a required field.

2. **Language**: The second element is Language. Keep this at Language Neutral. (For pages that are going to be translated into another language, this feature can be useful.)

3. **Body**: The Body field contains a text editor, also called a WYSIWYG, meaning *What You See Is What You Get*. You can add content here similar to how you would enter in Microsoft Word.

4. **Related Content**: Add links here to related content that is either off-site, or in a separate section of the website. (It does not make sense to link to content within the current section, because the menu is used for that.) Multiple links can be re-ordered by drag-and-drop.

5. **Main Image**: This is an optional field. An image can be added here, and it will appear above the content that was placed in the **Body**. Alternatively, you can add an image within the WYSIWYG.

6. **Files/Documents**: If a file is associated with the page, upload it here. More on this process follows.

7. **Key Search Topics**: This field is normally left blank. It manipulates the search results to give high priority to any word or phrase entered here. It is used if you want to point a certain page for any given search term on the site. The Site Manager should be consulted before using this field to ensure all are in agreement.
Testing Site Page

This is the Body Field. It can be as long as needed. This is the Body Field. It can be as long as needed.

- This is the Body Field. It can be as long as needed.
- This is the Body Field. It can be as long as needed.

1. Page Title
2. Language (not shown)
3. Body
4. Related Content
5. Main Image
6. Related File

Sample-Document.docx
Google
Revision Information

An Editor user has access to “Revision information” at the bottom of the page. Log messages about changes made to the content, as well as set the moderation state of a node, to “Draft” or “Needs Review”.

Text Editor / WYSIWYG

Four training videos found on the DigitalCommons.nc.gov website demonstrate the functionality of the text editor/WYSIWYG, which is found on all content types.

1. Text formatting options.
2. Bullets and numbering
3. Add a link
4. Add an anchor
5. Add an image
6. Paste text from another source.
7. Structure page with headings, in correct order
8. Add content in table format
9. Go full screen with the WYSIWYG

Best Practices for 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.
Links in Text Editor

1. Internal path: Use for links within site. Enter URL string after domain name. For the following links, simply use the underlined portion in these examples:
   - http://abc.gov/path/path/page
   - http://www.xyz.gov/something/something/something/page

2. URL: User for links outside of site. Enter full URL.
3. Link to Anchor: Drops to text below.
4. Email: Create a link to email address.

Best Practices for 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

1. URL for existing image. Usually ignore.
2. Browse server. Allows you to find an image that is already on the website or to upload from your computer.
3. Alternative text is required for accessibility.
4. Width and height should not be adjusted here. Leave them blank. If needed, scale the image down before uploading it.
5. Border can usually be omitted.
6. HSpace can be added if there is no padding. A value of 8-10 is good. No VSpace is needed.
7. Alignment can be left or right. If no alignment is set, text will not wrap around the image.
8. Captions can be added in the Advanced tab. If adding a caption, do not specify a Border or HSpace since they will be automatically added.

Best Practices for 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 Drupal, 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.

Add a Video within the Text Editor

The steps below demonstrate adding a YouTube video to the text editor. This also works for Vimeo. Click the “Instructions” in the Video dialog box for the full list.

1. Select the youtube video you want to insert and click the Share button.
2. To copy the highlighted link, press **Control + C** (PC) or **Command + C** (MAC).

3. In your text editor, click the Video Icon. A Video Filter dashboard window appears.

4. Paste the URL in the Video URL field, then click the **Insert** button.
   
   **Note:** Leave the Width and Height fields blank and leave the Align field set to None. The video will always default to full width.

5. Your video link is automatically created for you. Since the video will display full-width, consider placing the video at the end of the page.

6. **NOTE:** The Youtube link will look similar to this: [video:https://youtu.be/iTYe3ZZDlew]. See the image below.

   ![YouTube Video Link Example](https://via.placeholder.com/150)

   After you have made all of your changes to document, click the blue Save button and view the video.
Press Release

1. The Press Release content type is a traditional news release containing text-only content about a new development or announcement. Most fields are the same as those in a Site Page. Unique fields for Press Releases are:
2. Release Date: Date that will appear at the top of the content with a special treatment on the saved view.
3. City/Location: Place related to the content in the Press Release; this appears at the top of the saved view. This field is required.
4. Summary: Plain text area for teaser of the Press Release content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser.
5. Subtitle: Press Release is the only content type to have a subtitle. You can use subtitle to make your page title shorter.
6. Taxonomy Terms: The specific type of press release (e.g., Breaking News, Bulletin, Newsletter); if a selection is made here, the term appears at the bottom of the saved view with special treatment; the term selection also helps site visitors filter the press release on the “Press Releases” list page

1. Taxonomy with a set vocabulary, multiple options available (press and hold Ctrl when selecting the options).
2. Taxonomy with a set vocabulary, only one option available.

Document

The Document content type contains an attachment with information related to files such as docs and PDFs. Most fields are the same as those in a site page. Unique fields for Documents are:

- Summary: Plain text area for teaser of the Document content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- Document Author: Plain text field for the creator to whom the Document will be attributed
• Document Type: Radio button options of taxonomy term used to define the type of attachment (e.g., Bulletin, Manual, Policy); if selected, this will appear with a special treatment at the bottom of the saved view
• Attachment: The file attachment(s) to be associated with the Document node; file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB; note, multiple files may be uploaded. This field is REQUIRED!
• Official title: The title that will appear on the Document detail view. If this is left blank, the title that appear is the file name. Be aware that the official title is for every document attached to the node, so it is best to leave this field blank when there is more than one document/file.
• First Published > Date: Date when Document was first published
• Last Updated > Date: Date when Document was last updated

Event

The Event content type contains the details of a happening, including details of Date, Time, and Location. Most fields are the same as those in a Site Page. Unique fields for Events are:

• Dates: The date and time of the event. This field is required
• Show End Date: Checkbox that, if enabled, will allow a user to add the end date and time of the event
• Location: Multiple fields specifying the event location's street address; if content is entered in these fields, it displays in the right column of the event's “When and Where” section. Adding a location also triggers a Google map to display on the event page.
• Virtual Location: Information for online access to an event; if content is entered in this field, it displays in the right column of the event’s “When and Where” section, under the street address
• Cost: Any fees associated with the event; if content is entered in this field, it displays in the right column of the event’s “When and Where” section, under the virtual location information
• Summary: Plain text area for teaser of the Event content; activated by selecting the “Edit summary” link next to the title of the “Event Description” field; if this field is left blank, a trimmed value of the full Event Description text will display as a teaser
• Event Description: WYSIWYG enabled field allowing for special text treatments
• Organizer: Person or group responsible for hosting the event; term selection displays with special treatment directly on the saved view of the Event detail node
• External URL: Title and URL for more information (not within the CMS) about the Event; if content is entered in this field, it displays in the right column under the event’s “Organizer” section
Managing Content

When a Page is Ready to Publish

Editor:
- Create the content and set to Needs Review.
- Notify publisher that the page is ready. Note: system doesn’t alert publishers automatically.

Publisher:
- Review page per the Publishing Checklist.
- Make sure you’re looking at the Draft (not the Published) and set to Published.

Finding Content

Select Find Content from the main toolbar and choose option for search all content - published or not.

1. Add in a word or two from the title.
2. See only the pages in a certain content type
3. See only the pages that are draft, or needs review
4. Search on content within the page body

Workbench

Select My Workbench from the main toolbar to see all your content that needs review.
• **My content > My Edits:** Content items most recently created or edited by the individual user (list displays up to five nodes)

• **All Recent Content:** Full list of site content, listed in the order of most recently updated nodes

• **My drafts:** Content items that the Editor user has created or edited, in either “Draft” or “Needs Review” state; note, the “Needs Review” state is technically unpublished, hence why nodes in that moderation state display in this section of “My Workbench”.

• **Needs review:** Content items in “Needs Review” state that the Editor user has created or edited.

Workbench is used for these content types:

  - *Site Page*
  - *Document*
  - *Press Release*

*Workbench is not used for events, since they are published as soon as they are saved*

### Saving and Moderation

These are the available states when saving:

• **Draft:** The default save state for any page. With Workbench, it is possible to create a new draft of content while the existing (published) version remains live

• **Needs Review:** The status used to signify that content is ready for publication. Pushing content from “Draft” to “Needs Review” signals that the content is ready for an authorized user to review and publish (or send back to “Draft” state for further revisions)

• **Published:** The state content is in when it is visible to a public, unauthenticated site visitor.

Each role experiences these states differently:

  - *Editors have access to save content as Draft or Needs Review but not as Published.*
  - *Publishers have to move content from Draft to Needs Review before they then make it Published.*
  - *Site Managers and Site Admins can move content directly from Draft to Published.*
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 Drupal, 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.
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.