BASIC DRUPAL TRAINING

Getting Started with Digital Commons
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Overview
This guide provides basic instructions for the most common tasks content editors and publishers will perform on a Digital Commons website:

- Editing existing pages
- Adding new pages for new content
- Adding or replacing and linking documents

More detailed resources are available in the Digital Commons Library section of NC.gov at http://www.nc.gov/digital-commons/library.

Log in to the Site
1. Go to the website and add /user after the home page address.
   
   In the security window, enter:
   
   User name = nc (must be lowercase)
   
   Password = preview (must be lowercase)
   
   Click OK.

Click to continue to the site.
If the security window appears again, re-enter:

User name = nc
Password = preview

Click OK.

2. At the log-in screen, enter your NCID and password:
Explore the Editing Environment

Once logged in, notice a Drupal band at the top of the screen, above the site banner. An orange band means you are in the staging site, and a black band means you are in the production site. If this is your first login and you don’t have a Drupal band, then your site administrator needs to assign you a role on the site before you can do any work.

Also notice when you click through the menu, each page has a row of tabs above the page content. You will see these tabs when logged in. Regular site visitors do not see them.
Make a Simple Edit to an Existing Page

1. Go to the site page that you need to edit. In the screenshot below, the “Digital Commons” in the DIT site has a current state of Published, since “View Published” is the first tab.
2. To edit a page, click the **New draft** tab.

![Digital Commons: New draft tab](image)

3. A screen with a WYSIWYG (what you see is what you get) editor will appear. Notice the row of formatting icons above the page content. It looks very similar to MS Word or other text editors.

![Digital Commons: WYSIWYG editor](image)

4. To make a very simple edit, such as to change a word or a few sentences, type your changes directly inside the body of the WYSIWYG editor.

   If making large-scale changes, such as replacing all the text, it’s better to create the text in a Word document first and copy from Word into the WYSIWYG editor.
Before copying text from Word, first place the cursor inside the WYSIWYG editor where you want the content to go. Do not paste it there directly. Instead, choose the the “Paste from Word” icon, and enter the new text in the dialog box that appears:

Pasting with this icon allows Drupal to strip out unnecessary source code and automatically apply the site’s design template to the pasted content. This is especially helpful when pasting tables from other sources, including Excel.

5. When ready to save your changes, scroll down. On the left side of the page toward the bottom, you’ll see Moderation State. Keep it as draft until you are ready for a publisher to review it. Then you can make it “Needs Review.”

6. Scroll down further and click Save.
7. After you’ve edited the page and are happy with it, and saved it with the status of Needs Review, you will see “Needs Review” as the revision state of the draft. Make sure the page looks right, there are no typos, links work correctly, etc.

8. For editors, this is the point to contact a publisher and alert them the page is ready for their review. For publishers, if you’re satisfied it’s ready to publish, click the arrow next to Needs Review and select Published then click Apply.
You may have to refresh the page (F5 or Ctrl/F5) to see the saved, published content.

Create a New Site Page

1. In the menu bar at the top of the page, select **Add content**. This page lists the Drupal content types for our website.
2. Scroll down the page and click **Site Page**.

3. Enter the page title in the Title field, then enter the page content in the body of the WYSIWYG editor. **Word the title carefully**: It will become part of the page URL.
Best Practice: When adding new content to a page, create the content in Word and have your manager or approver approve it before you enter into Drupal.

Tip: When copying content from Word into the body of the WYSIWYG editor, remember to use the “Paste from Word” icon.

4. Publishers, before saving the page, should indicate whether the page should appear under a menu, and if so, which menu heading it should appear under (its direct parent). (Editors do not have the ability to place something in the menu; the publisher will need to do that for them.)
5. Also, click on **Meta tags** to enter metadata for the page.

   The page title should be formatted “NC IT: Page title” (whatever the title is). This is the **minimum** amount of metadata required for the page.

   For the Description, delete the text [node:summary]. Enter a brief description and/or keywords that will help users searching for content on that page. This description will show up on search engines, like Google, so the description should make sense out of context.
6. Scroll down and click **Save**.

7. View the current draft of the page content. When satisfied that it’s ready to publish, change the status from **Needs Review** to **Published**, and click **Apply**. Refresh the page, if needed, to see the updated content.
Add or Replace a File Associated with a Page

Some pages, like the service catalog, have an associated file for the Service Level Agreement (SLA) or other item at the bottom of the page. For example, the image below shows the SLA file link for Application Development and Support.

1. To update or replace an associated file, click the **New draft** tab above the page content.

2. Scroll down below the WYSIWYG editor until you see the “Files” section.
3. Click **Remove** to remove the old file. The file will disappear.

4. To add a new file, click **Browse** to select the new file from your computer, then click **Upload** to upload and attach it to the webpage. In most cases, the file “Description” should not change if you are simply replacing an older file with a newer version.

5. Scroll down the page and click **Save**.

6. Review the updated page to make sure the link works correctly, then change the page status from **Needs Review** to **Published** and click **Apply**.
Link a Document within a Webpage

1. Go to the webpage you need to edit, and click the **New draft** tab.
2. In the WYSIWYG editor, select the text the document should link to and then click the Link icon in the formatting row.

Here’s the Link icon:

3. When you click the Link icon, a link dialog box will appear.

4. To select an existing document that’s already on the website, change the Link Type to URL.
5. Then click **Browse Server**.

Eventually, the File Browser will appear. It often takes several seconds (or longer) for it to open.
6. Click on the documents folder, then on the files sub-folder. You’ll see a list of all the documents on the site.

7. Scroll through the list until you find the document you want to link to and double-click to select it. The link dialog box will appear with the document’s URL already populated.
8. Click OK.
9. To save the changes to the page, scroll down and click **Save**.
10. Review the page to make sure the link works properly, then change the page status from *Needs Review* to *Published* and click **Apply**.

**To upload the document from your computer:**

- Follow steps 1 – 5 above.
- After you’ve opened the documents and files sub-folders to display the list of documents, click **Upload**.

### Best Practice:

Before uploading, make sure the document file name does not contain underscores or blank spaces. Insert hyphens between words in the file name.

- Click **Browse** to browse your computer to find the document you want to link to.

- Select the file, then click **Upload**. The uploaded document will appear in the file list.
- Double-click the file to select it. The link dialog box will populate with the document’s URL.
- Click **OK**.
- Scroll down and click **Save**.
- Review the page to make sure the link works properly, then change the page status from *Needs Review* to *Published* and click **Apply**.
Add a Document Node

Some top documents, like the Exception Form and Statewide Security Manual, need a “permanent” URL because they are referenced in multiple places throughout the site and visited frequently by users. Creating a Document node provides a page (node) specifically for the document. When you need to update/replace the actual document, edit its node so all references (links) to that node will point to the correct document version.

**Best Practice:** Links to a heavily visited document should point to its node, rather than the document itself. You update/replace the document associated with its node similarly to how you Add or Replace a File Associated with a Page.

**Note:** Document nodes appear in views, such as those generated for “Forms” and “Reports” under the “Resources” menu.

1. In the menu bar at the top of the page, select **Add content**, then click **Document**.
2. In the Create Document page, enter the document’s Title. This is the title as it will appear to visitors to the page, e.g., “Statewide Information Security Manual 2015” or “Exception Request Form.”

3. Scroll down below the WYSIWYG editor to find the Document Collection and Document Terms section. Select the Collection type and Term that best describe the document.

   **Note:** Tagging the Document Collection type is necessary to ensure a document appears in auto-generated views, such as “Forms,” “Reports,” or “Presentations.”
4. Attach the document to the node. Under Attachment, click Browse to browse your computer to find the document you want to link to. Select the file, then click Upload.

**Best Practice:** Before uploading, make sure the document file name does not contain underscores or blank spaces. Insert hyphens between words, as shown below:
5. Scroll further down and click **Save**.
6. Review the page to make sure the link works correctly, then change the status from **Needs Review** to **Published**, and click **Apply**.