General Walkthrough
Training Documentation

Office of Communications and Marketing

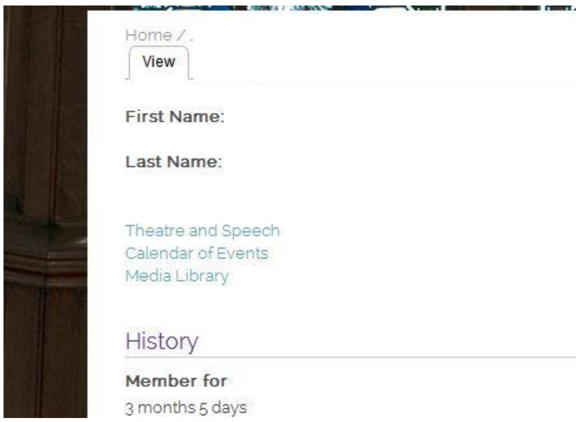
Drupal CMS

Updated 11.10.15

As a Content Editor, it is important to recognize and understand the following features:

Once you are logged on – done by simply going to CCNY.CUNY.EDU and clicking on the Login drop-down from the homepage and selecting Content Editor

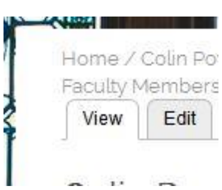
You will see your personal login screen. This login screen features a list of sites the you as a content editor are responsible for. All content editors will see Media Library listed as this is where images are shared across campus by the Office of Communications and Marketing or any other subgroup.



At the top Left corner of the screen you will see:

Add Content
Find Content
Basic Page
Using these key features, you will add content to your subsite, find content that you or a peer content editor have added, or create (new) a basic page.

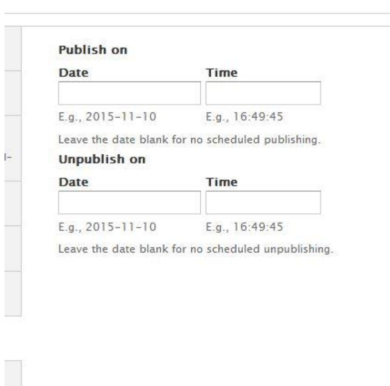
Once on your area subsite, you will notice that the View and Edit tabs display at the top of each page. This is how you either View the page as published or Edit the page to make changes.



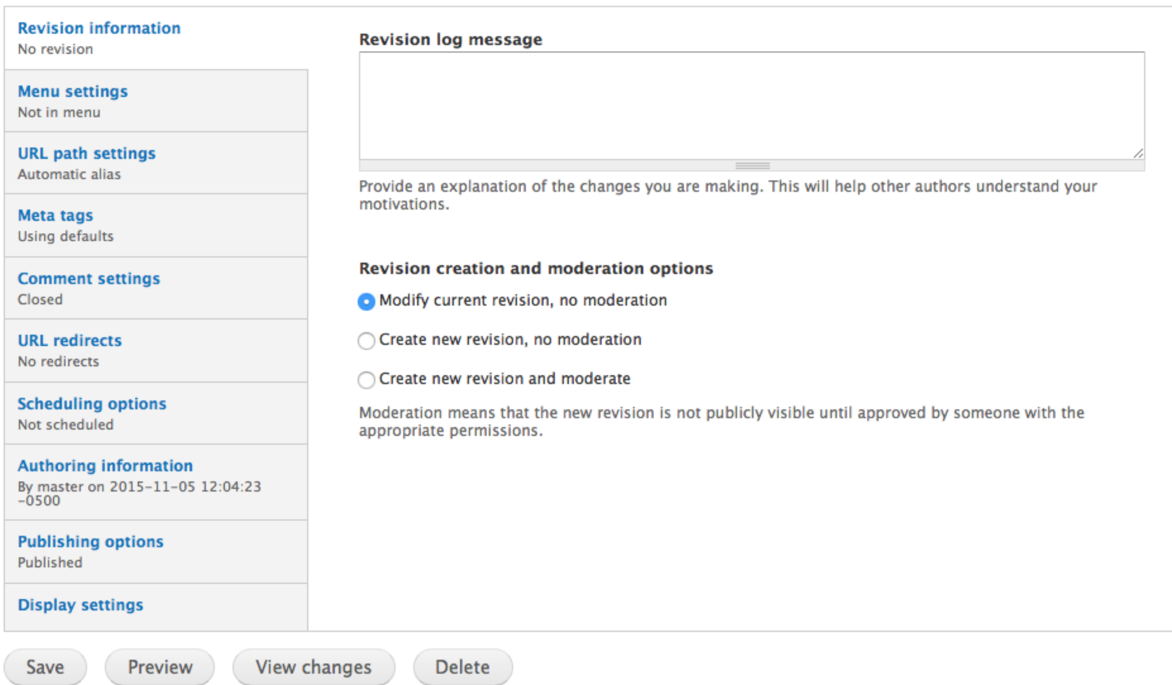
Once inside the Edit area of a page you will notice at the bottom of the page you have two new options:

Revision log – Create editing versions – This will be discussed in detail in pages to come.

Scheduling of content to go live/publish – Create a page or edit a page and publish it to go live at a later date.

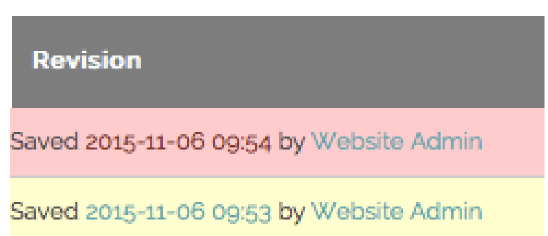


All pages, news events, calendar events, and posts are all on “ Modify current revision, no moderation”. When creating or editing, CHANGE TO “Create new revision and moderate” No Exceptions.

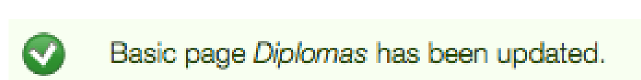


Once the revision is created, an administrator must publish the new version. To do so, go to the main page and click view changes.

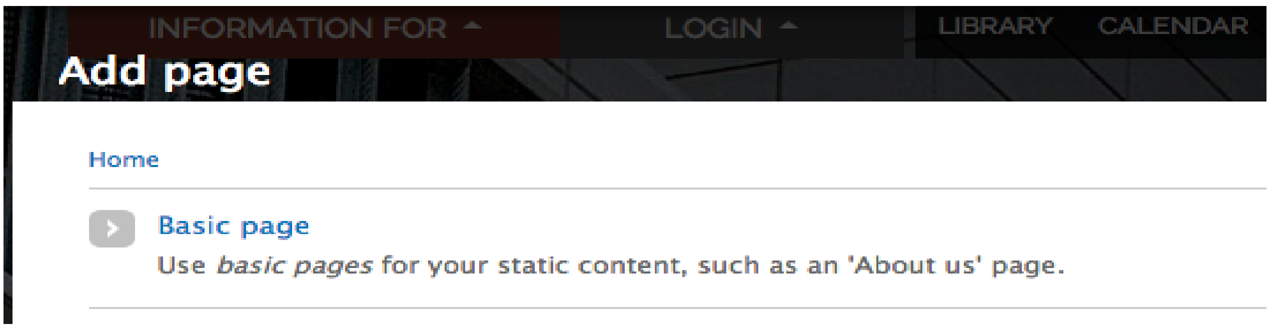
Inside view changes, the most updated version should be in red. To update to the most current version, click the date.



Confirmation of the revision post should come up at the top of the page.

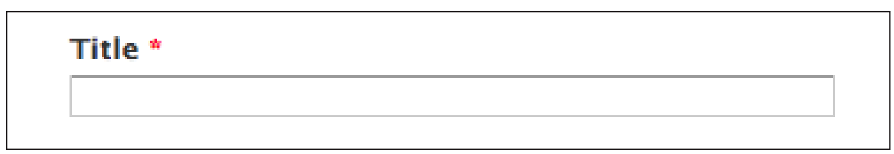


To Add a Basic Page, click in the toolbar, Add Content.

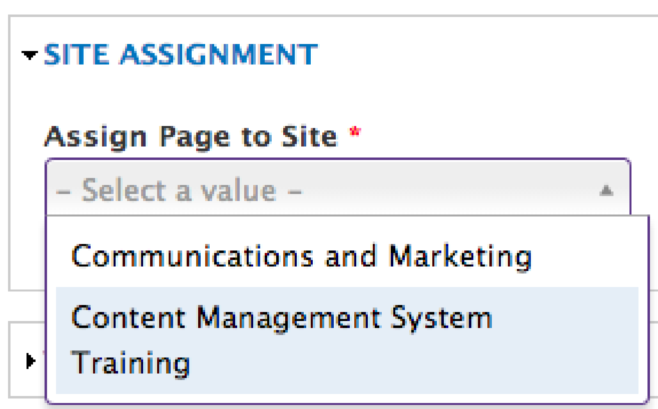


Choose Basic Page

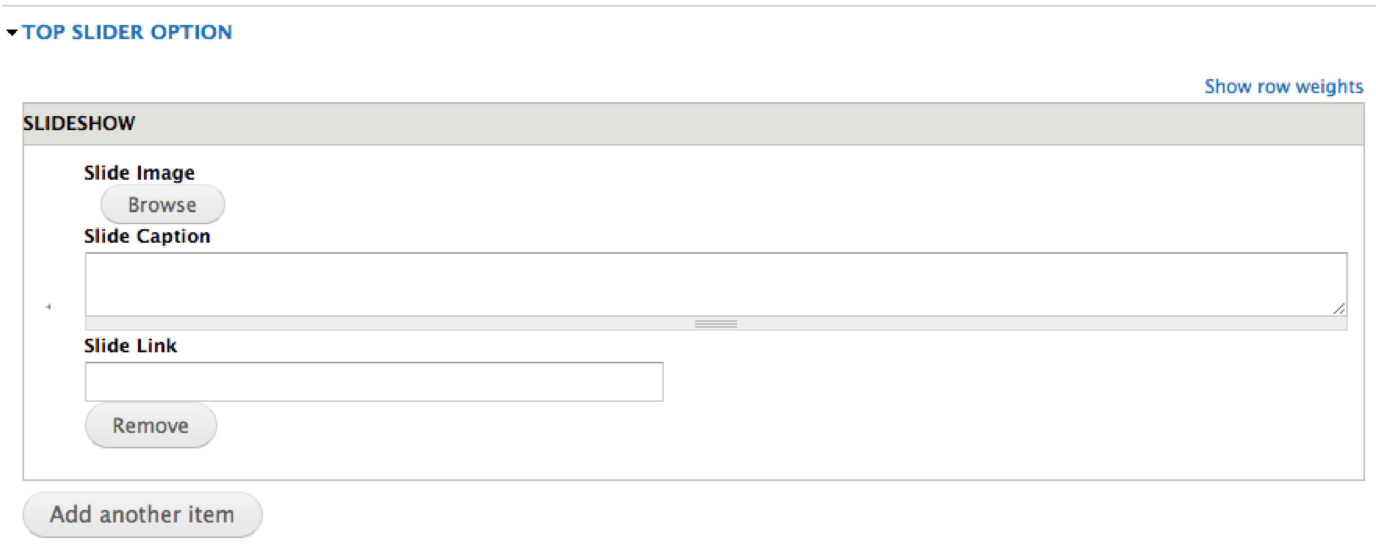
Add the title of your page



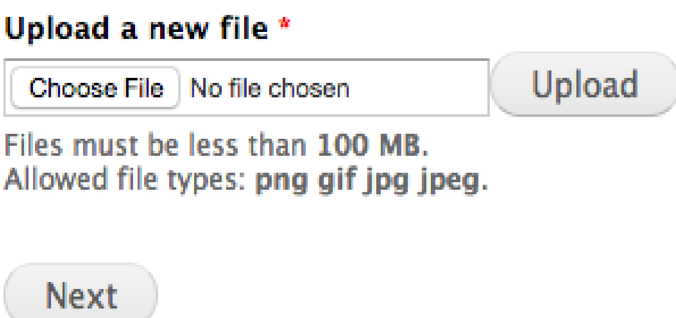
Add the page to the Site you are a part of.
Ex: Psychology, Biology,
Communications and Marketing, IT



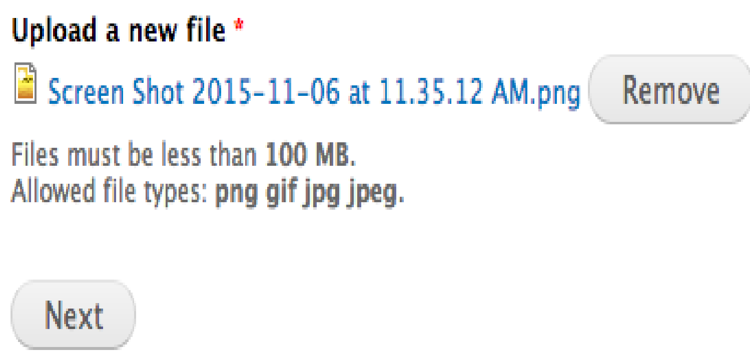
Optional: Add a slider image.



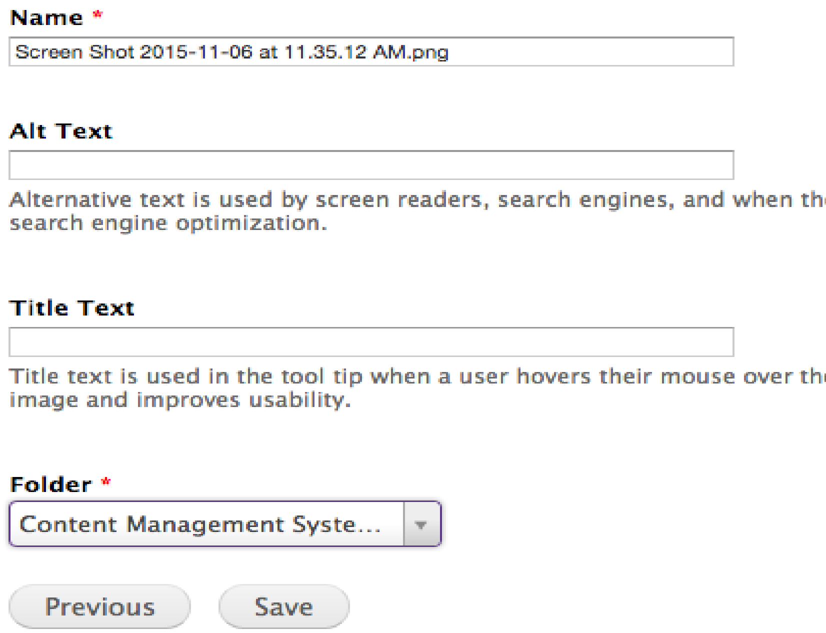
Choose your image by clicking browse. Once uploaded, click next.



->

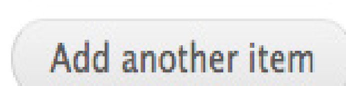


Title your image and assign to your group. Then click save.

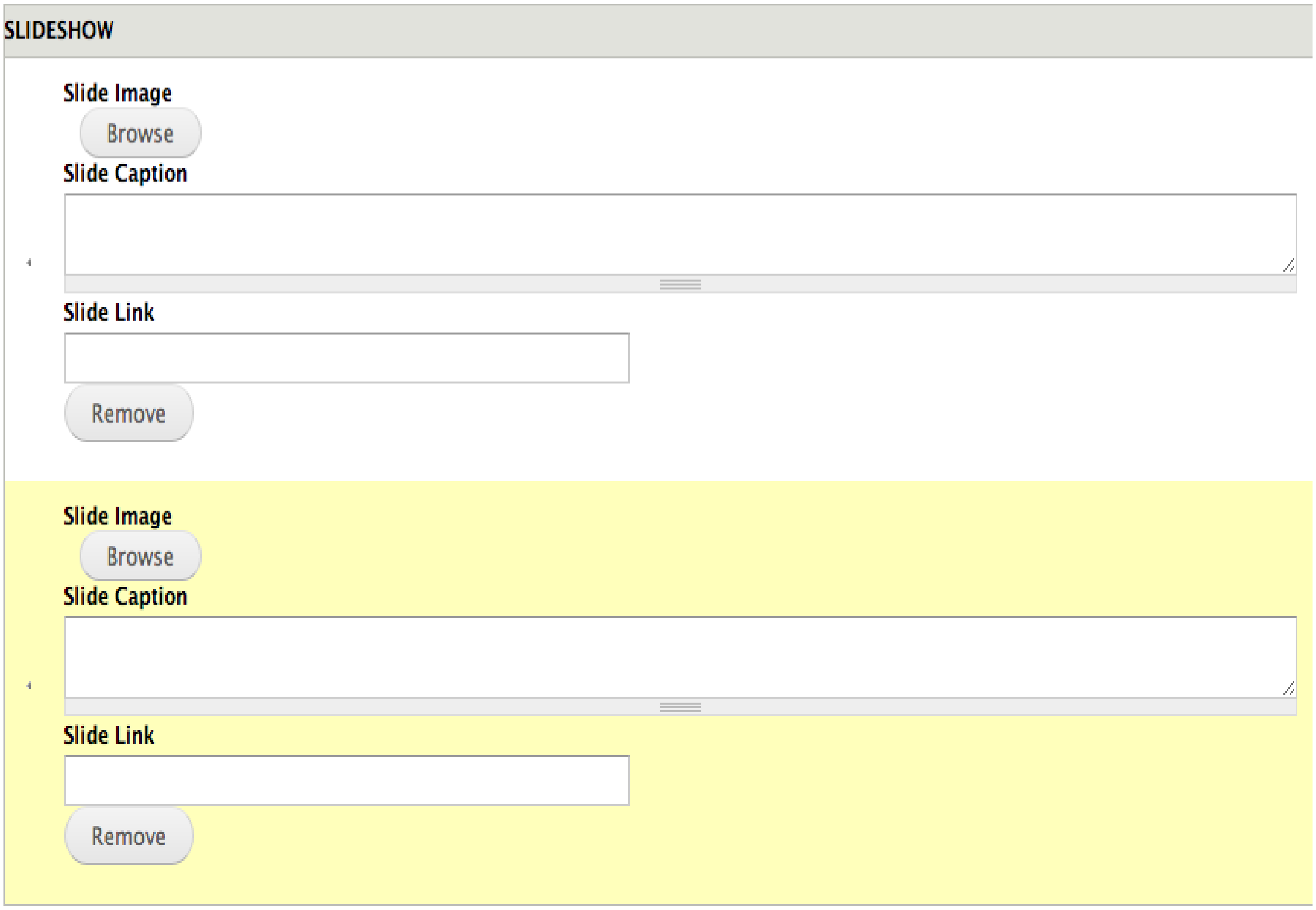


Once saved, you will return to the main set-up page. Add a slide caption and link (if needed).

For multiple sliders, click “add another item.”

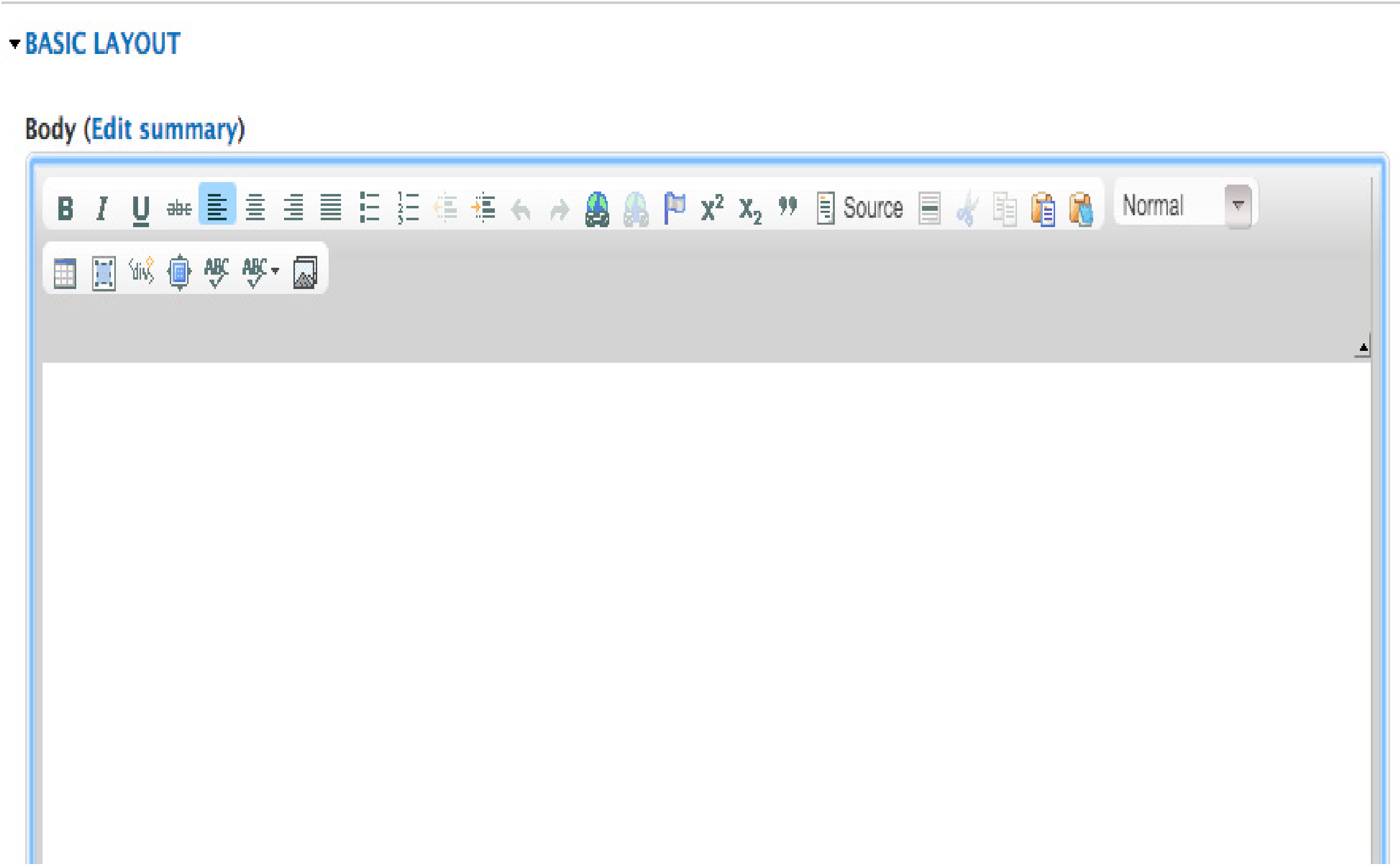


You can re-order the slides by dragging the sections from the left side button. The section will highlight yellow once picked up to move.

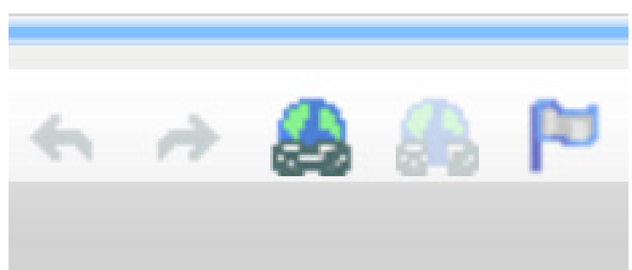


After slider images are chosen, next is adding the content. Drop down the BASIC LAYOUT tab

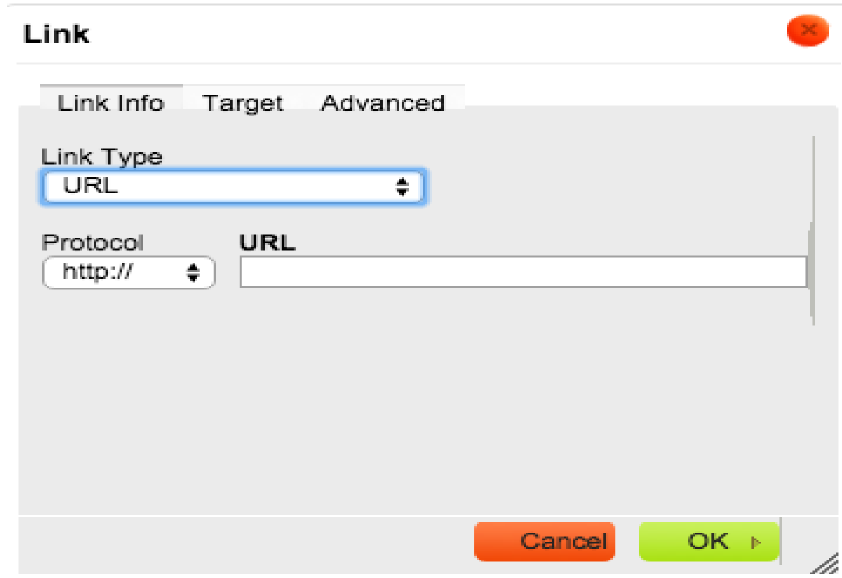
Type your content in.



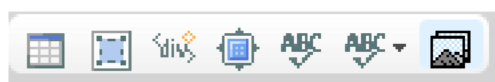
If you want to link a piece of text out to a website, click the green/blue link icon in the toolbar.



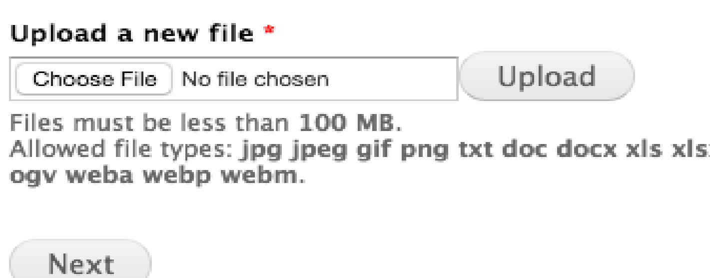
Choose your link type (URL, Anchor Text, Email)and fill in the Url section and click ok.



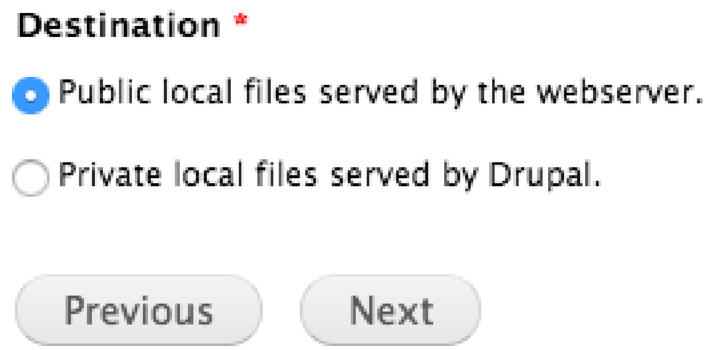
If you want to insert media into the body, press the media icon at the end of the toolbar.



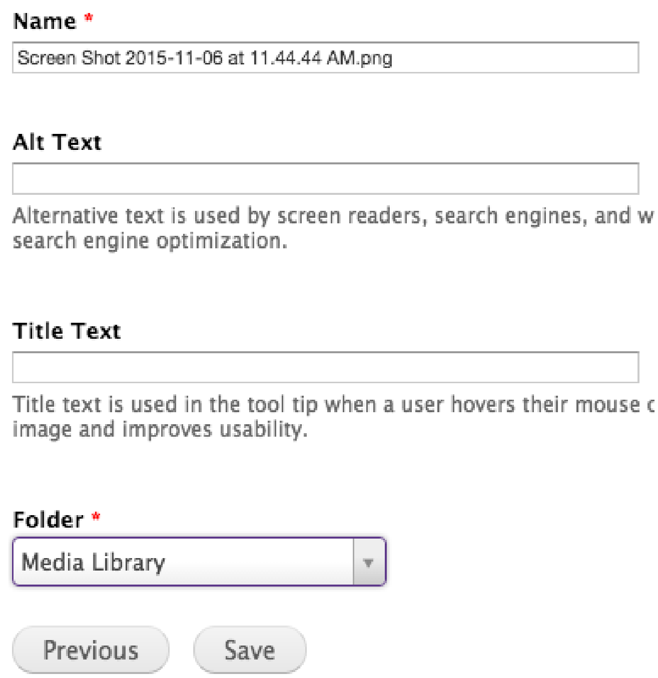
Upload your files, similar to the slider option layout and click next.



Choose which destination you want the file saved and click next.



Title your media and assign it to the appropriate group.

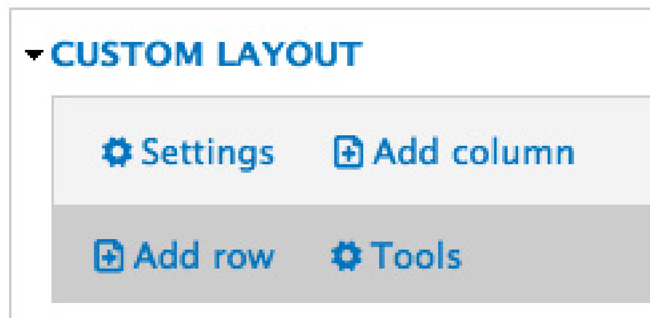


On the final page, click submit at the bottom.

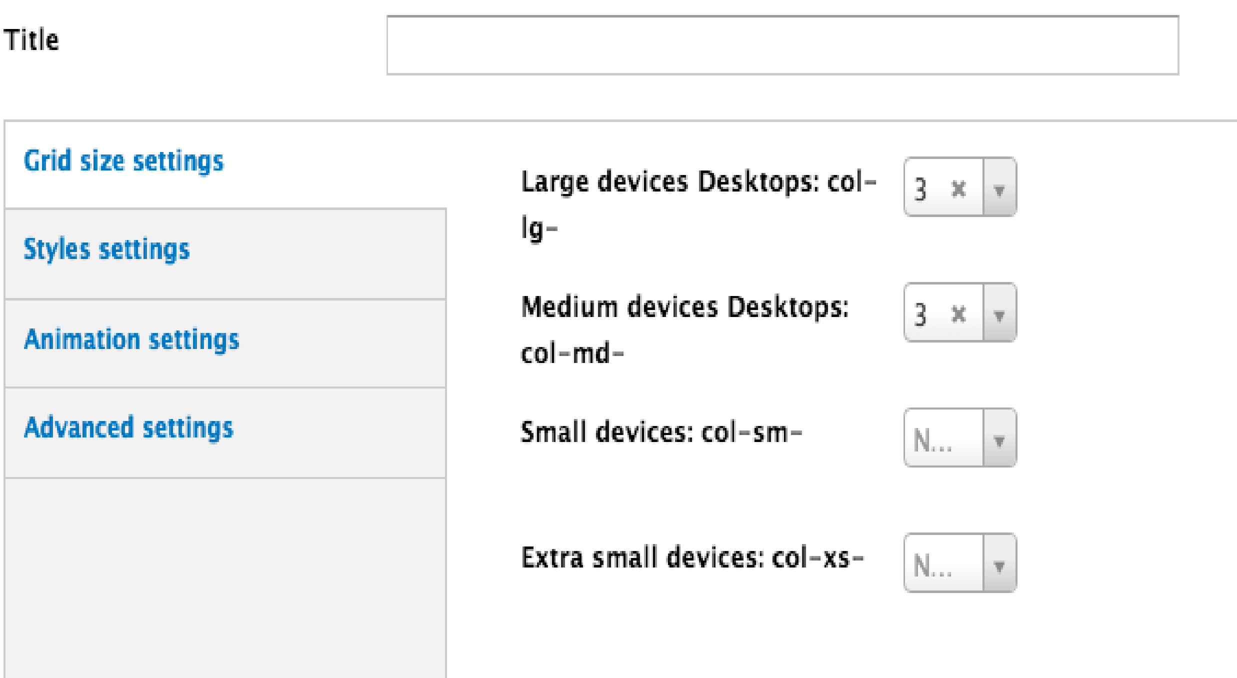
To disable rich text editor, click “Disable rich-text” under the Editor.

FOLLOW SAME INSTRUCTIONS FOR EDITING RIGHT SIDEBAR

To Create a Custom Layout, choose the grid system. Drop down Custom Layout and choose Add Row, than Add Column.



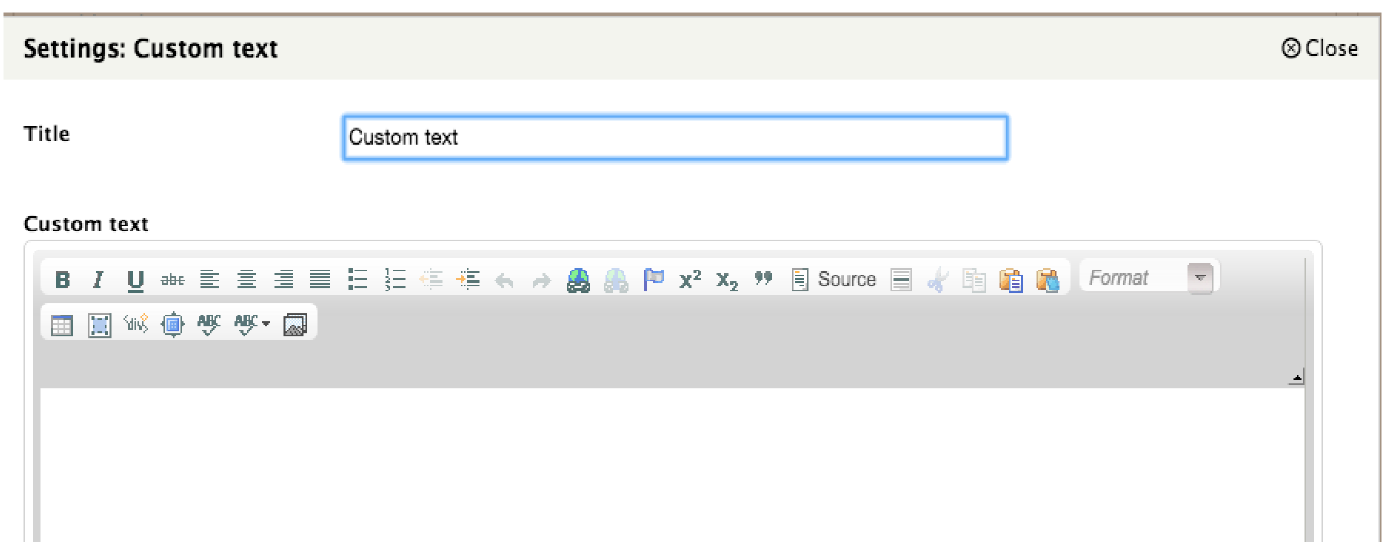
Inside All Column, first choose sections per device type.



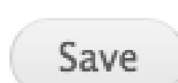
Once Saved, you will be brought back to content page. Click the gear icon in the no title section. Then Click Add Content.

Inside Content, add whether you want text, image or video.

If you want to use text, click custom text and you will be presented with the CK Editor.

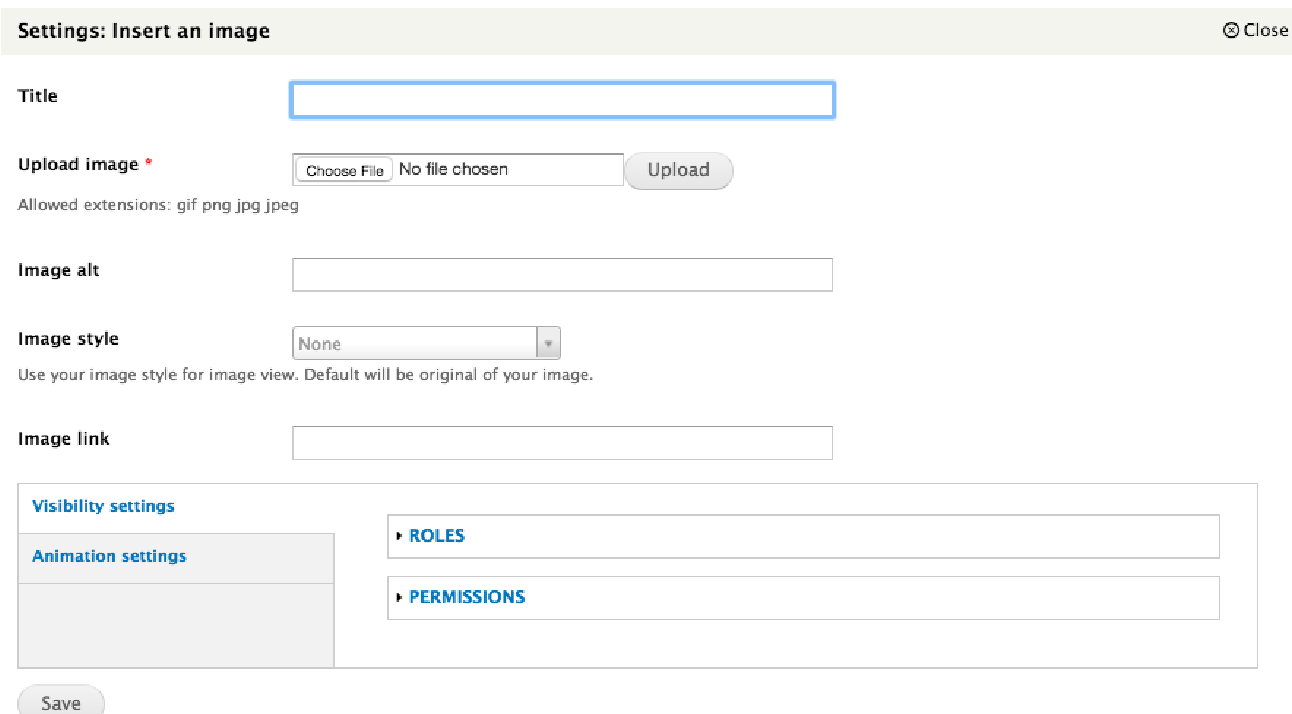


Once filled out, click save.

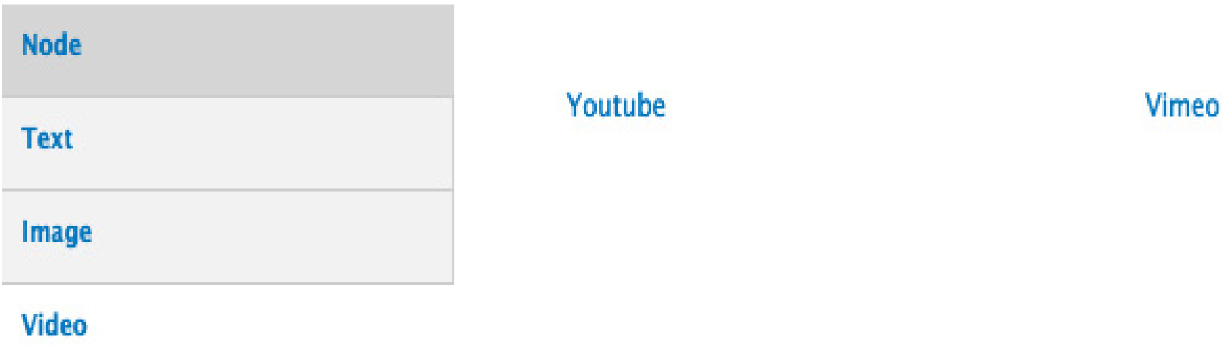


For an Image, click Insert an image

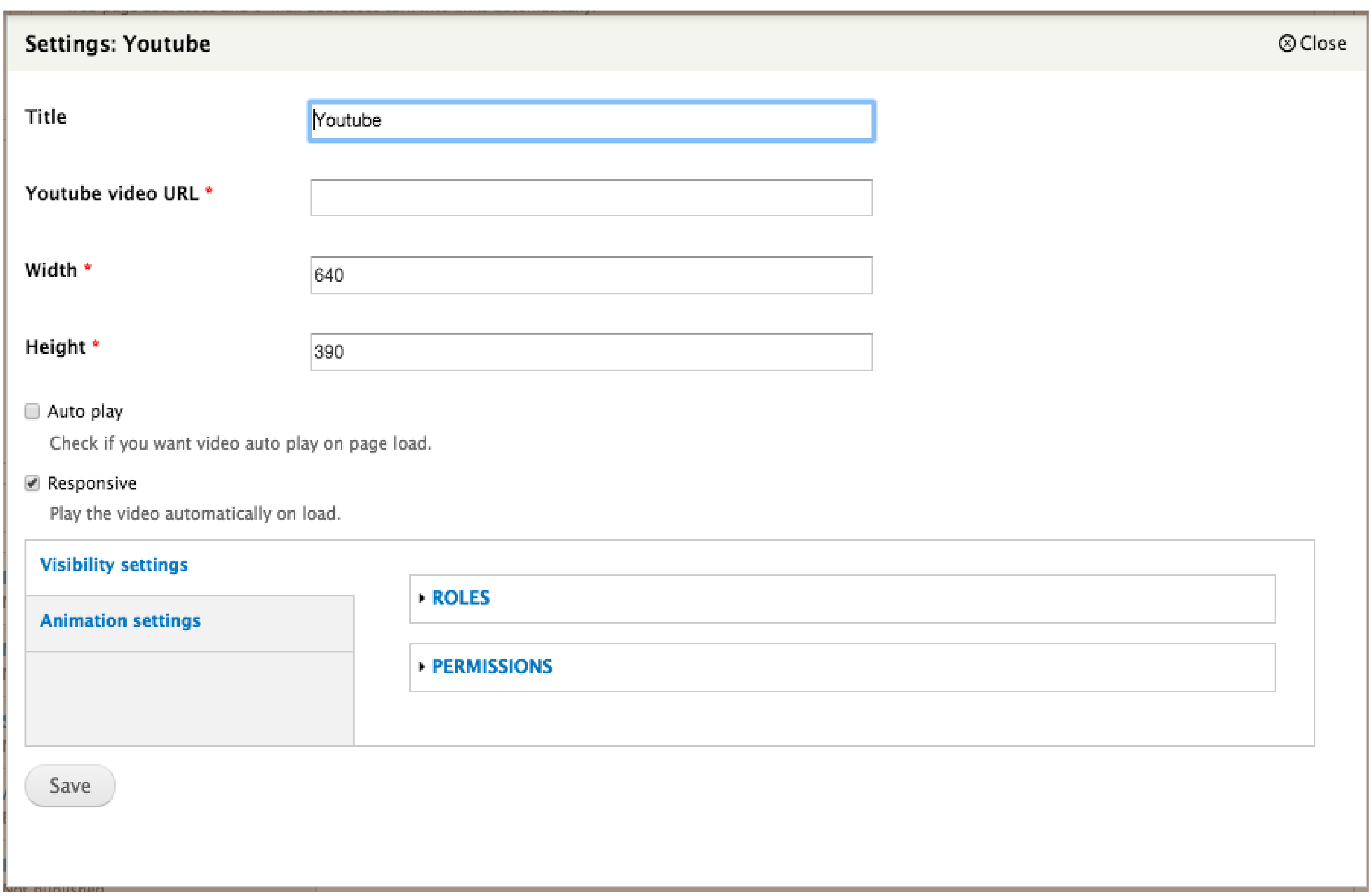
Assign a title, upload an image, assign size (under image style) if needed, assign image link if needed and click save.



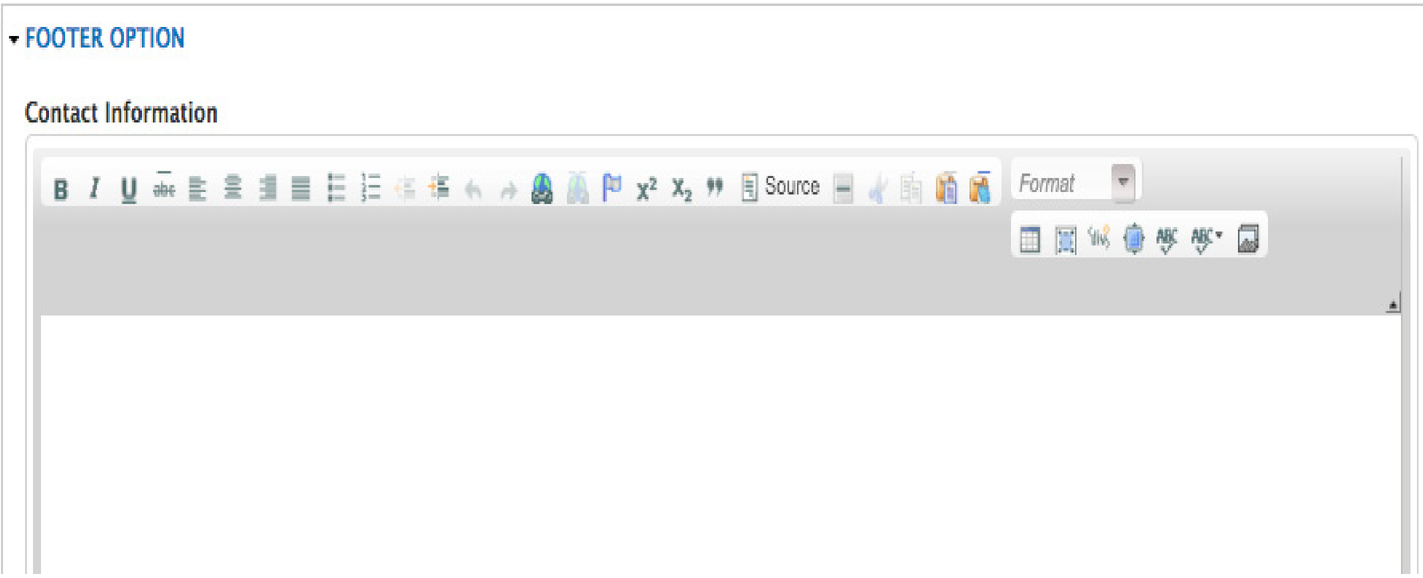
If you want to insert a video, you can insert through either Youtube or Vimeo.



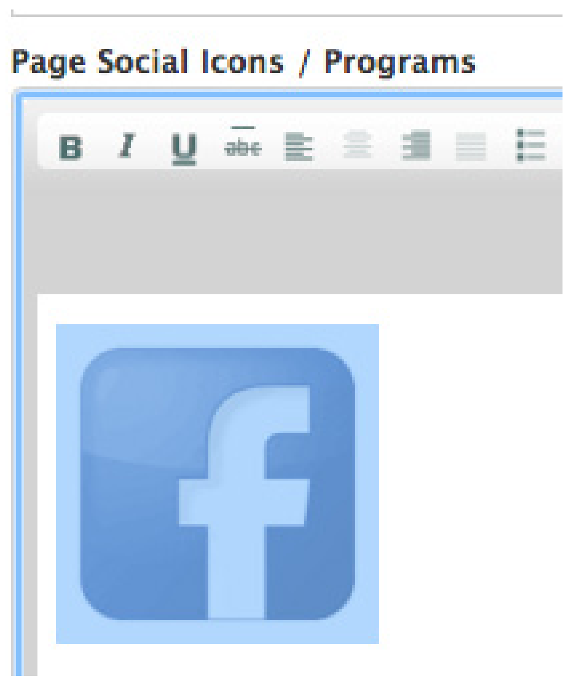
Both Youtube and Vimeo: Assign a Title, insert FULL Youtube URL, assign the size of the section you would like, and click save.



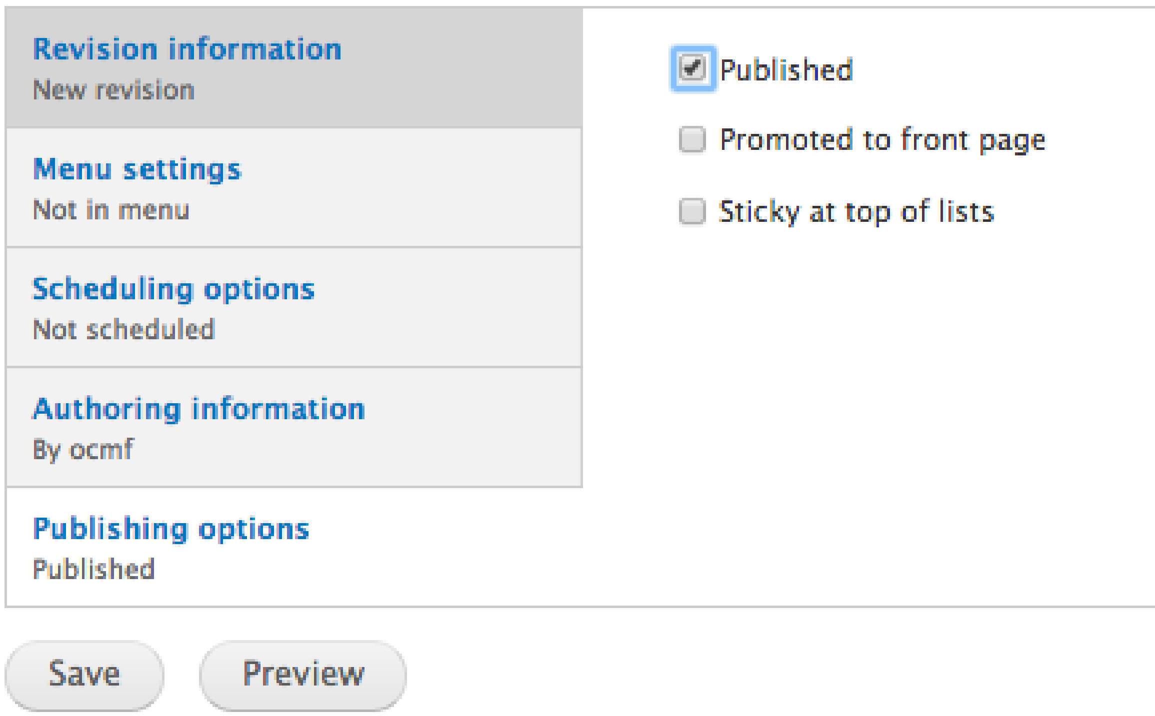
To add to the footer of the basic page, drop down Footer option and do contact information first.



After the main contact information, add social links if needed. Upload the media files and highlight the file in the body copy. Then link the image to your social site.



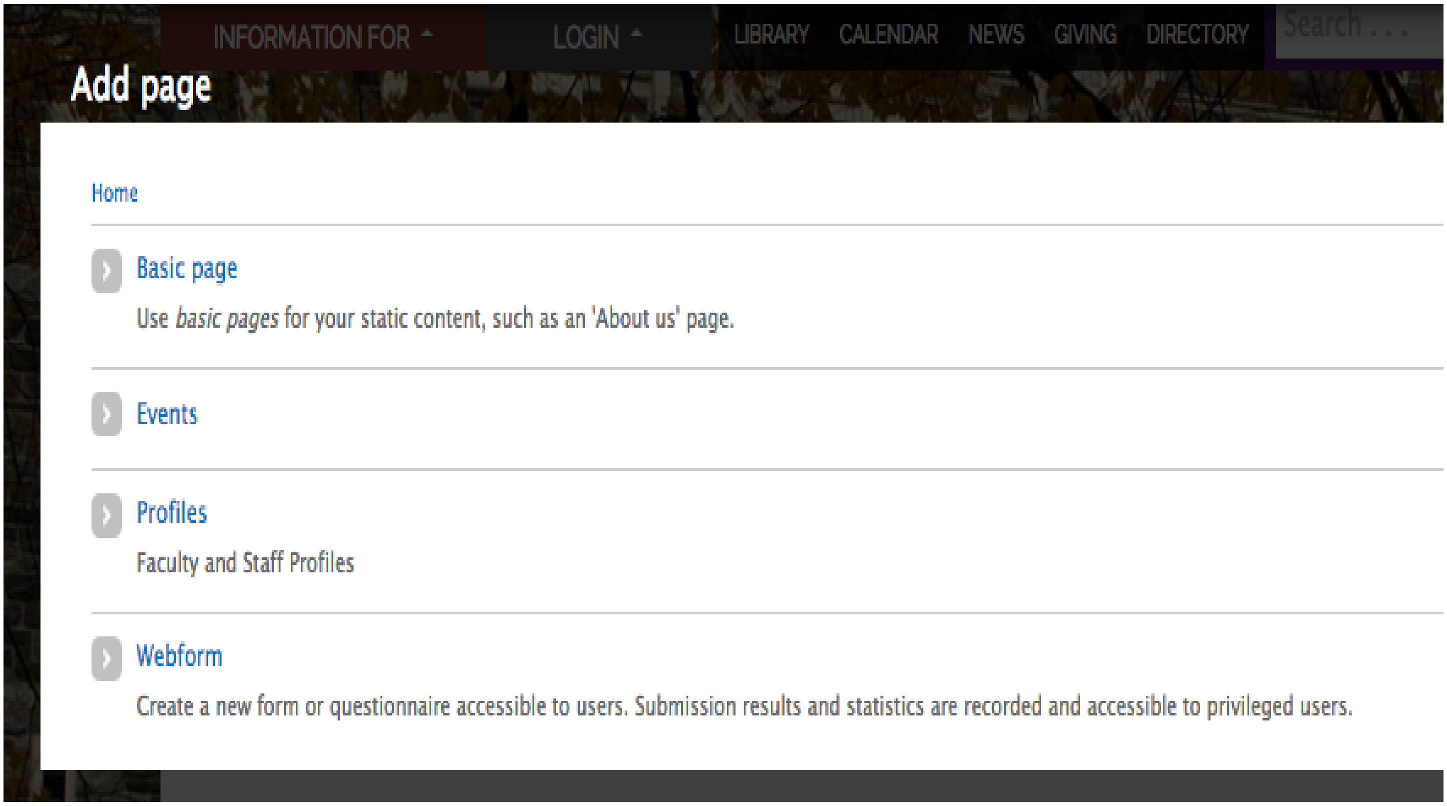
Once everything is filled in, publish the page. At the bottom of the page, click Publishing options and check off Publish. Then click save.



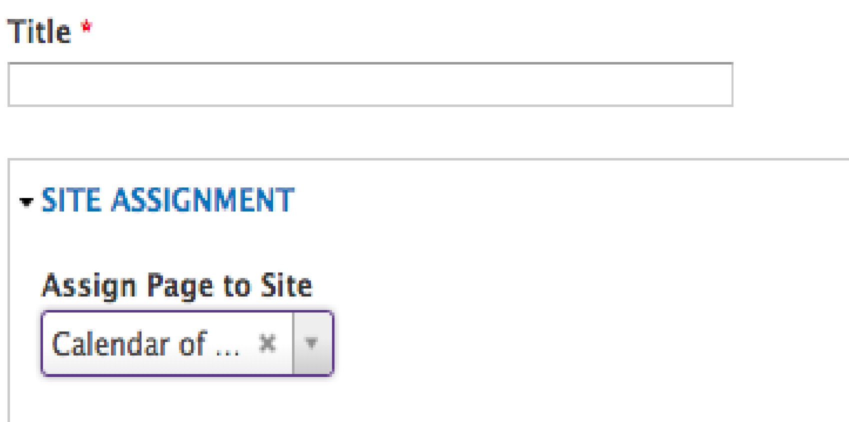
Checklist:

- Add Title
- Assign Site
- Optional Slider
- Body Content
- Optional Layout
- Add Footer
- Check Moderation
- Publish
- Click Save

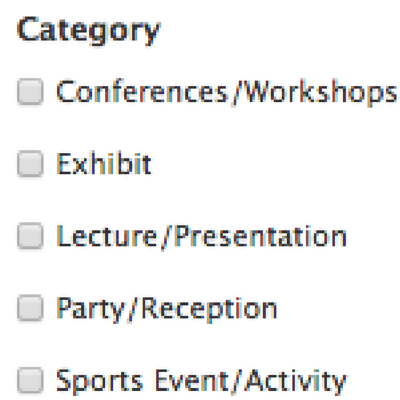
Click Add Content and choose Event



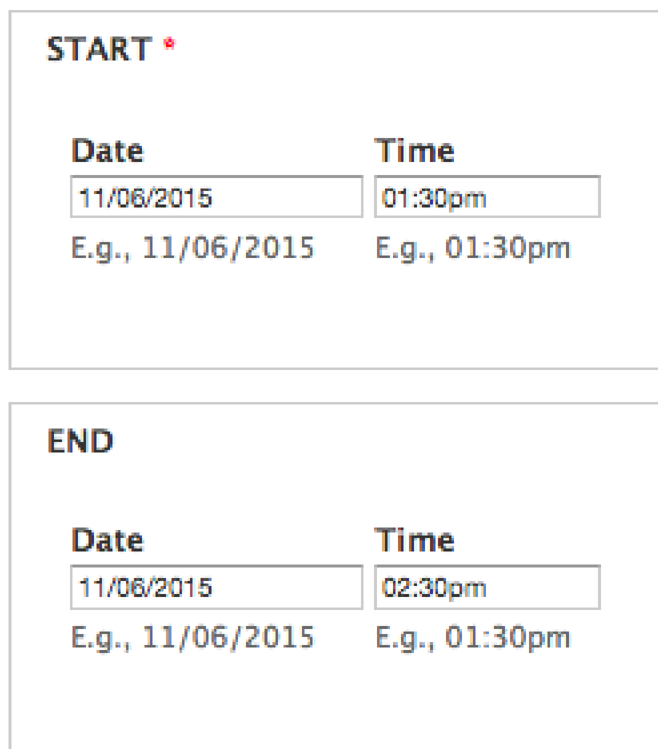
Title your Event and assign to Calendar of Events site



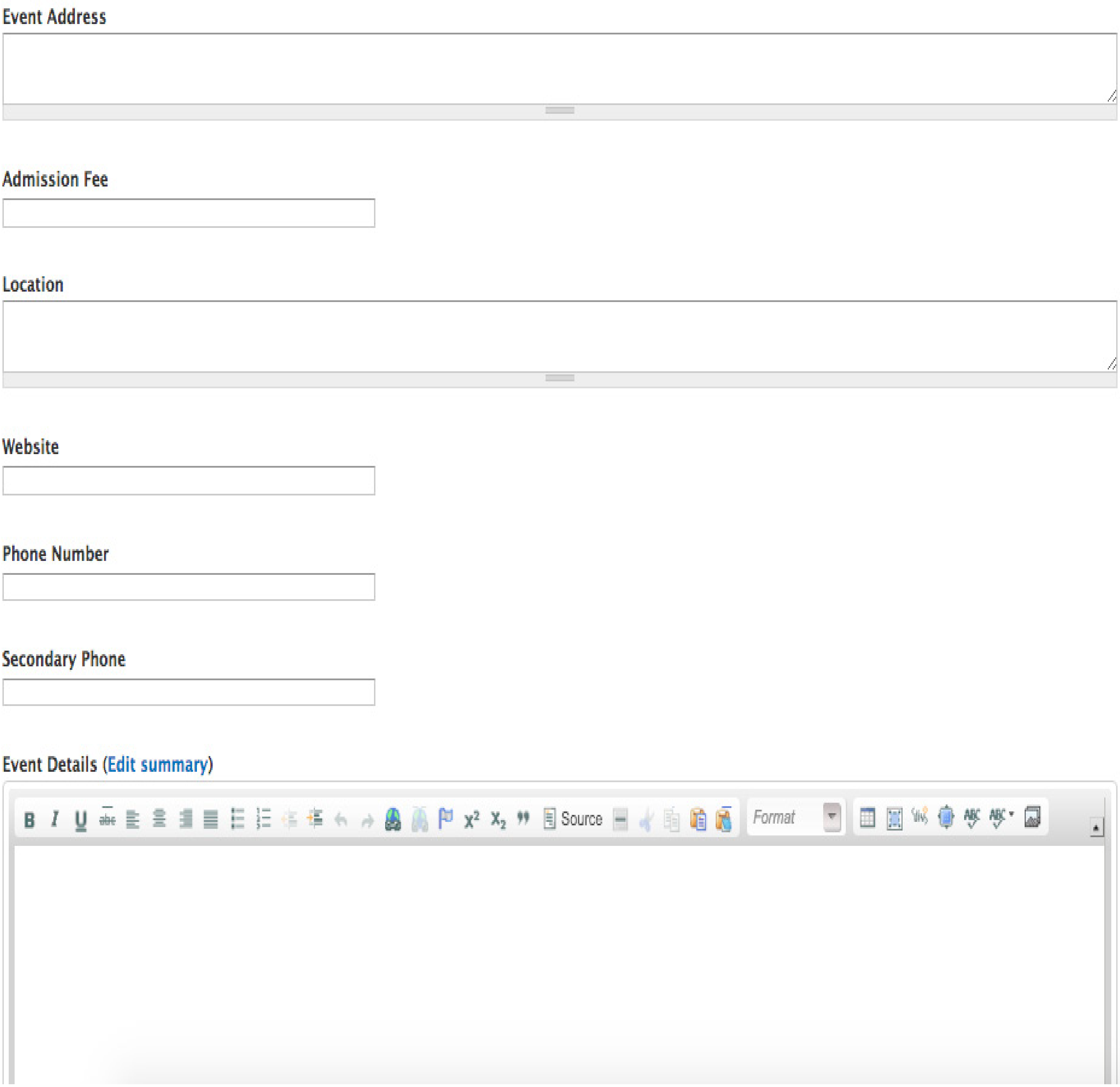
Check off applicable categories



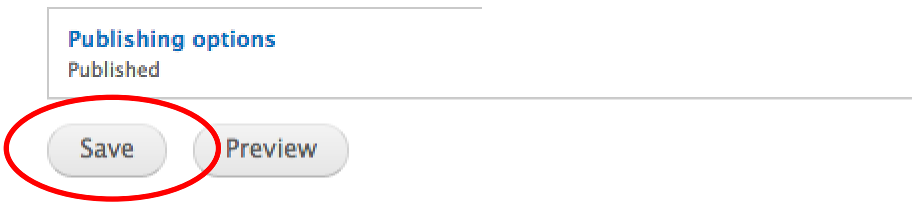
Provide a start and end date for your event in the format Year-Month-Day



Fill in applicable logistical information and event details



Once all the information is inserted, simply click save.



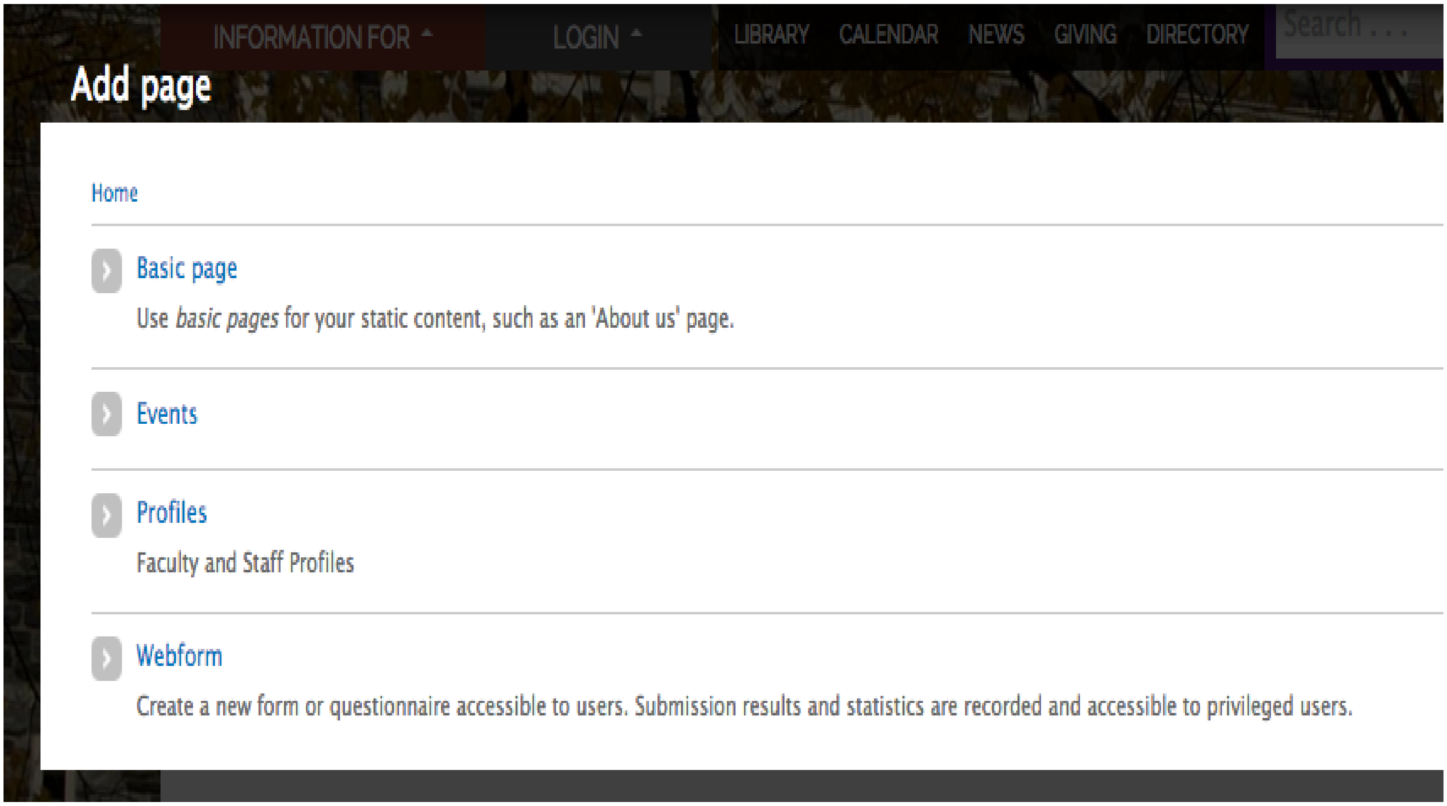
Checklist:

- **Add Title**
- **Assign Calendar Site**
- **Assign Category**
- **Provide Start and End information (Date and Time)**
- **Add Event Details**

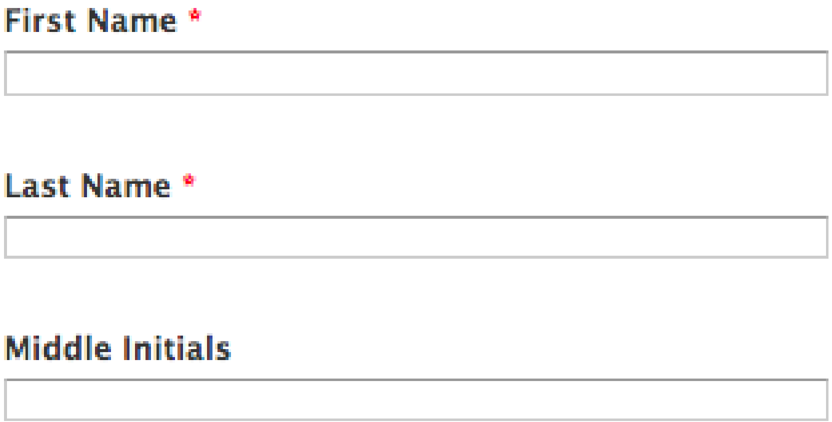
Once all the information is inserted

- **Click Save**

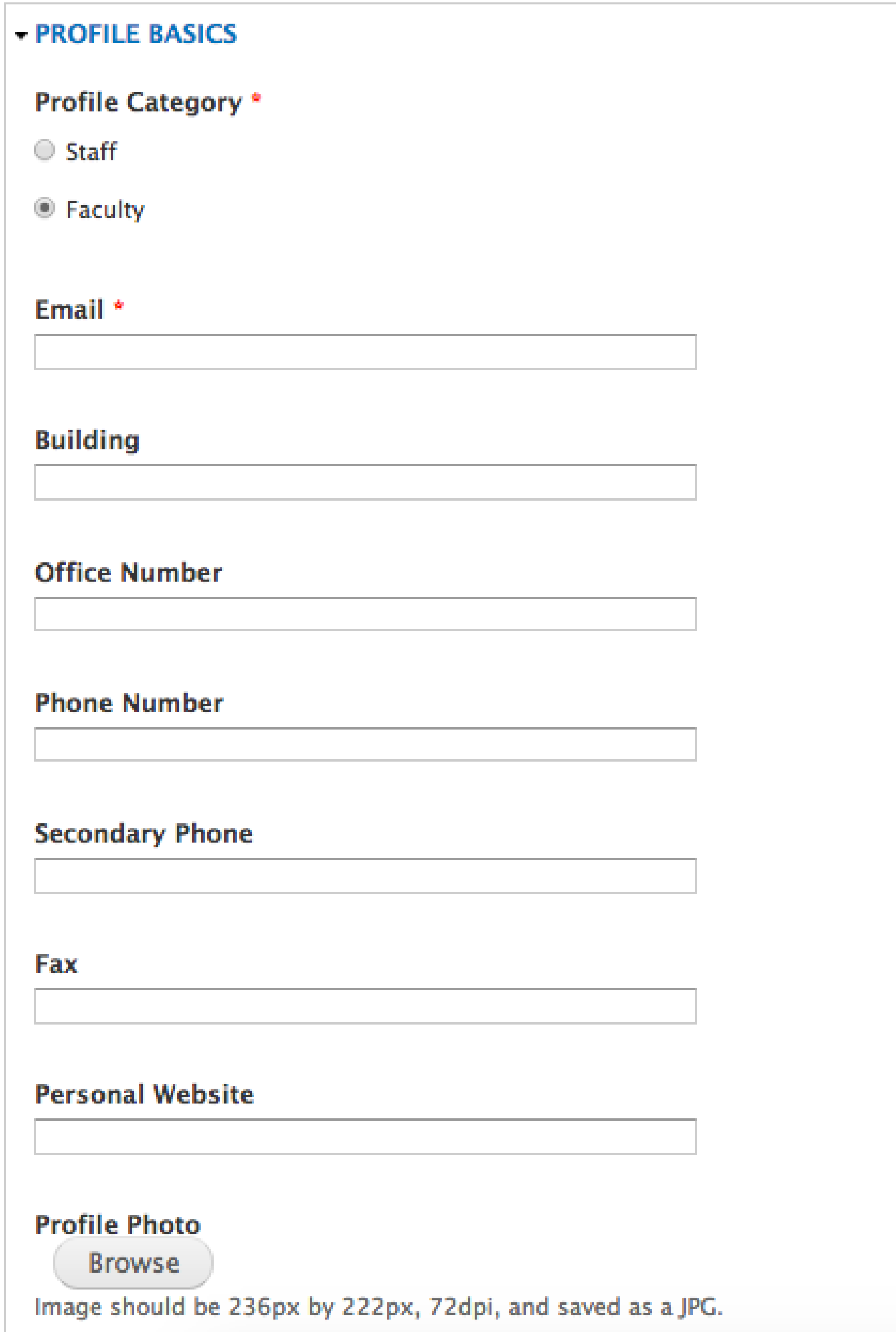
Click Add Content and choose Profiles



Add First Name, Last Name, and Middle Name (Optional)



Provide Profile Basics and upload image



PROFILE BASICS

Profile Category *

- Staff
- Faculty

Email *

Building

Office Number

Phone Number

Secondary Phone

Fax

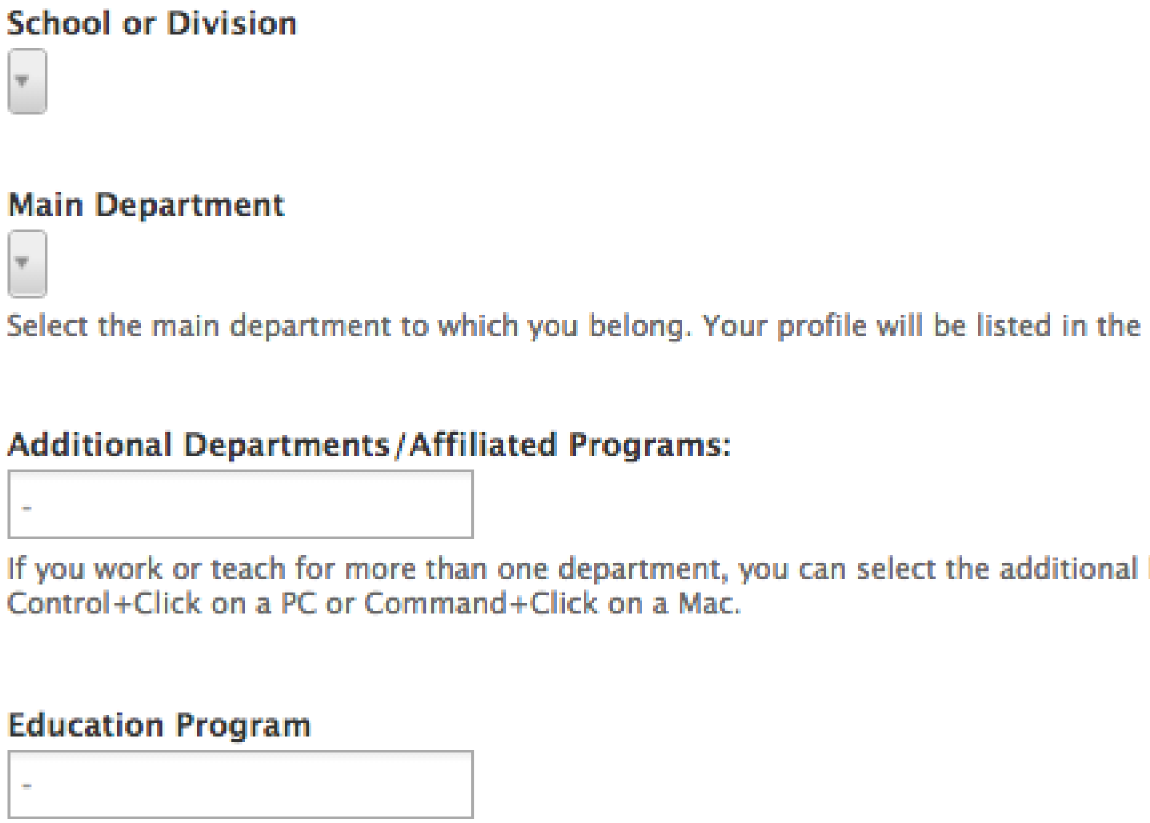
Personal Website

Profile Photo

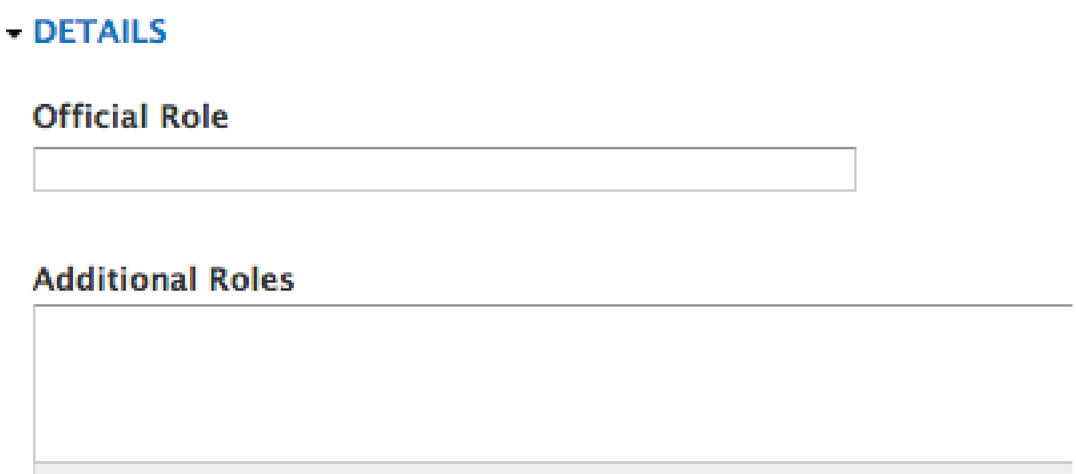
Browse

Image should be 236px by 222px, 72dpi, and saved as a JPG.

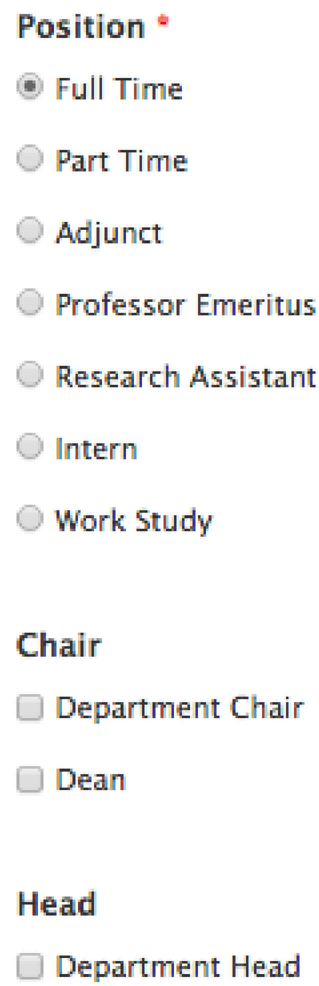
Under Categorization, fill in both Division and Department. Then if needed, fill in remaining information.



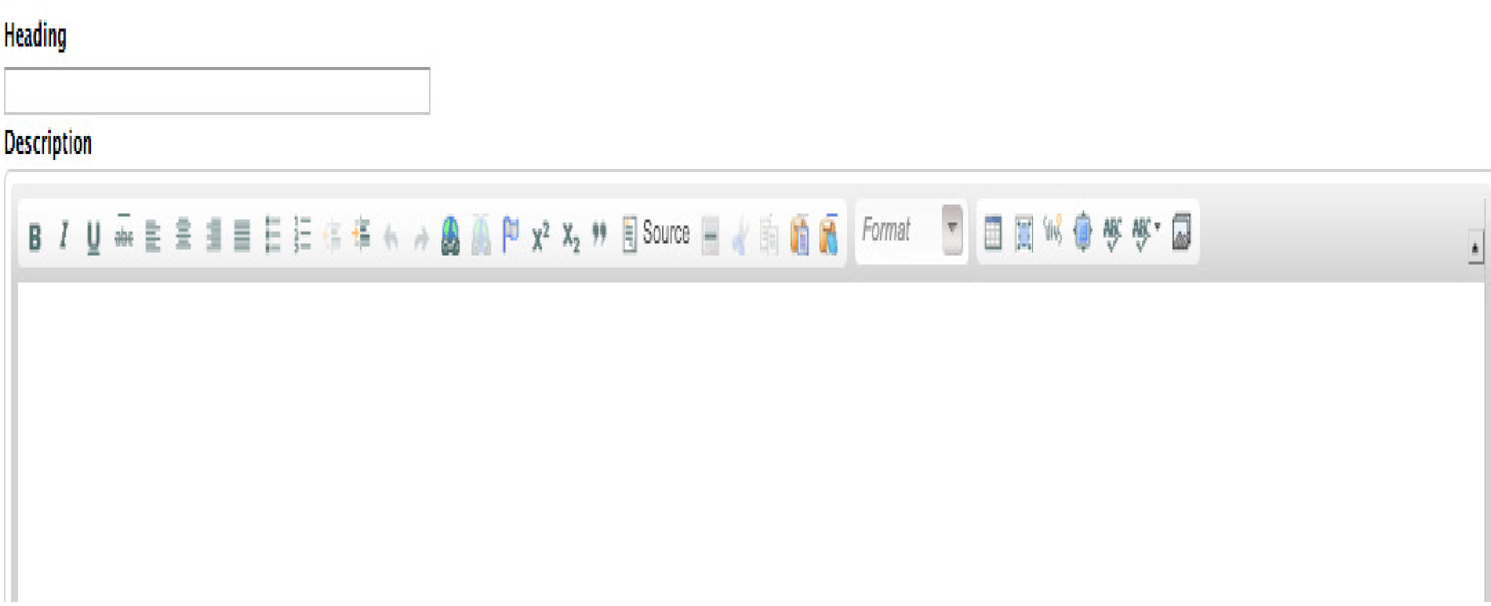
After Categorization, drop down Details and fill out Official Role followed by Additional Role if needed.



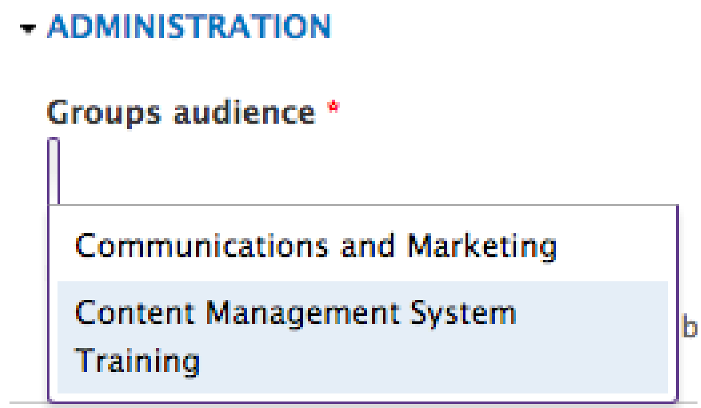
Fill out the required profile's position and optional status as chair, dean or department head.



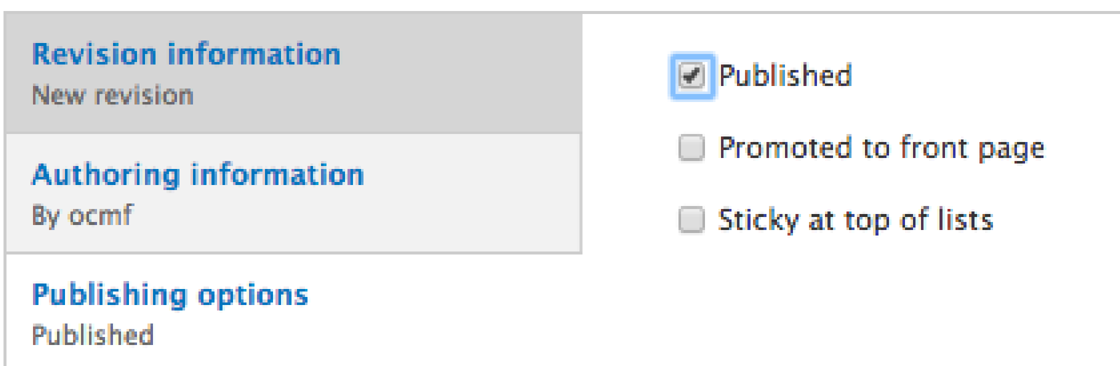
Fill out Miscellaneous info such as education, publications, etc in Profile Tab



After Details are complete, go to drop-down administration and assign the appropriate audience.



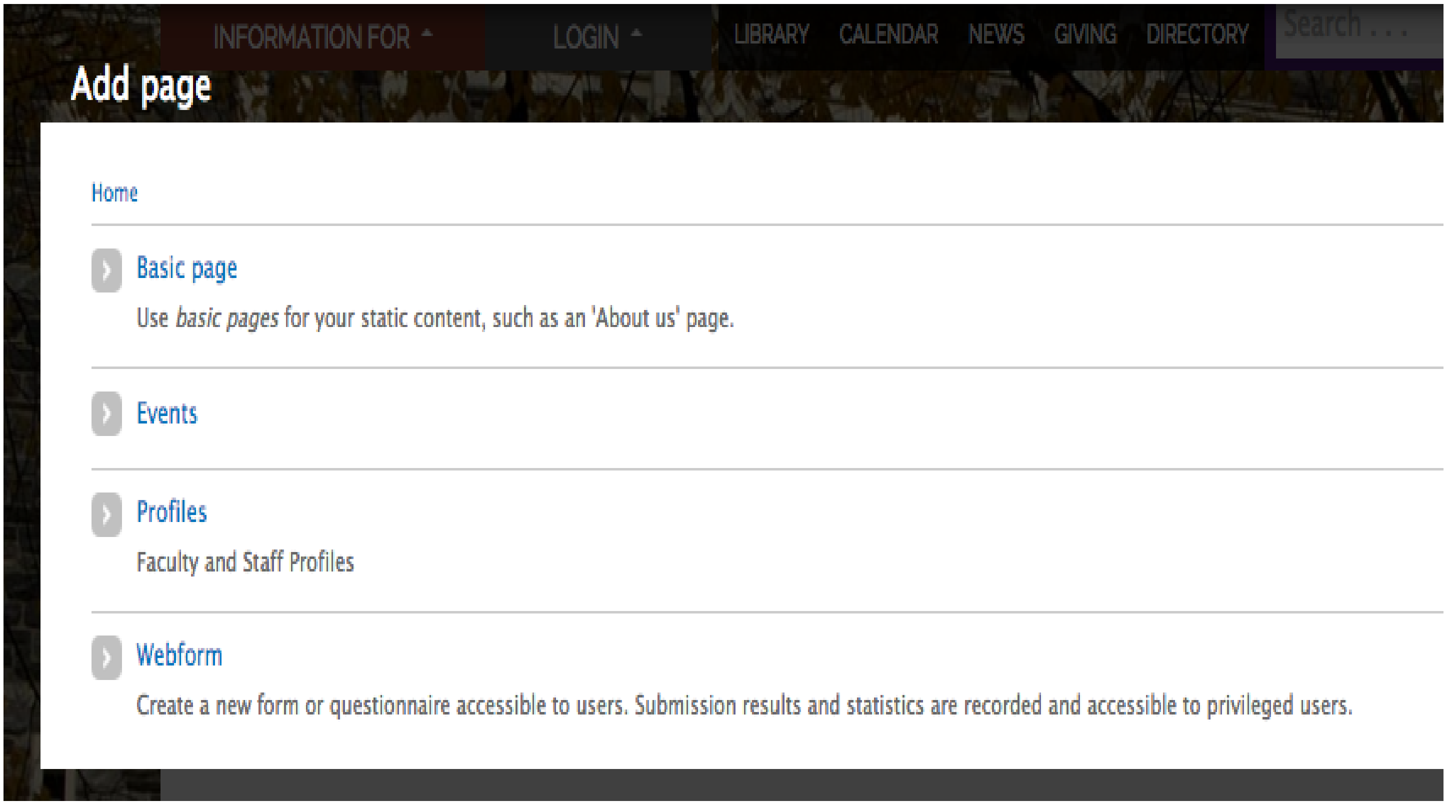
Once complete, publish the profile.



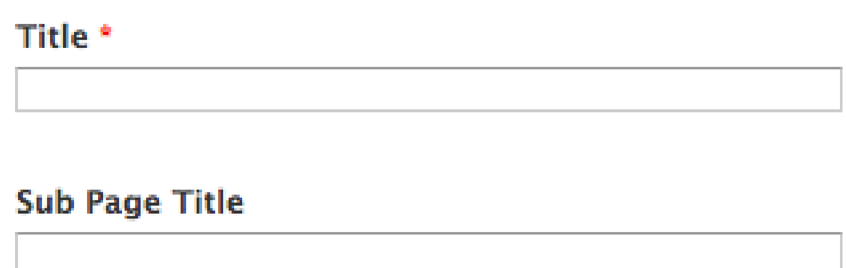
Checklist:

- **Fill in First and Last name**
- **Fill in Profile Basics**
- **Assign Profile Photo**
- **Body Content**
- **Categorize to appropriate department and affiliated programs**
- **Give Official Role and Position**
- **Fill in appropriate misc tabs**
- **Assign Group Audience**
- **Publish**

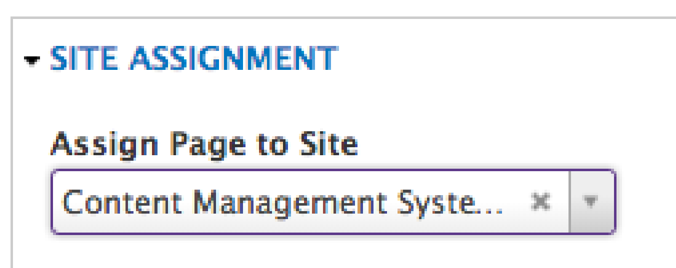
Click Add Content and Choose Webform



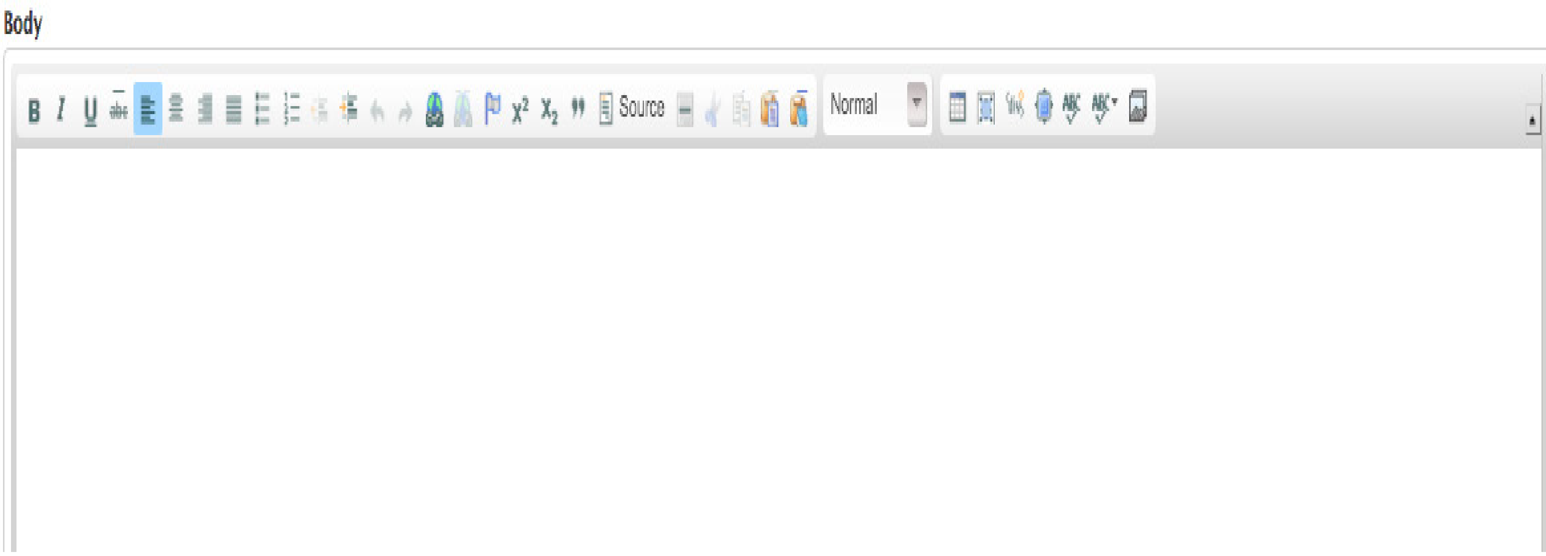
Assign a title and subtitle to your webform



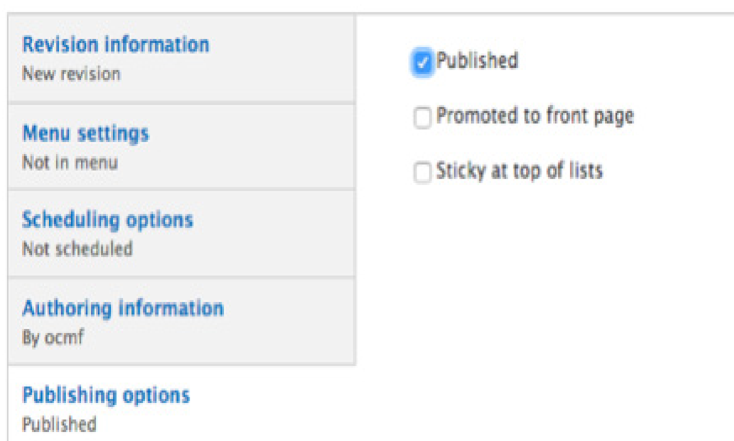
Assign your webforms to your site



Input your Body copy



Pulish your webform



Checklist:

- Add Title
- Add subtitle if needed
- Assign Site
- Fill in Body Copy
- Publish
- Save

Create form fields and make specific changes based on field type.

Form Components

Label: Name of the field

Type: Format on collecting data

Required: Users most fill out the information

Operations: To add field

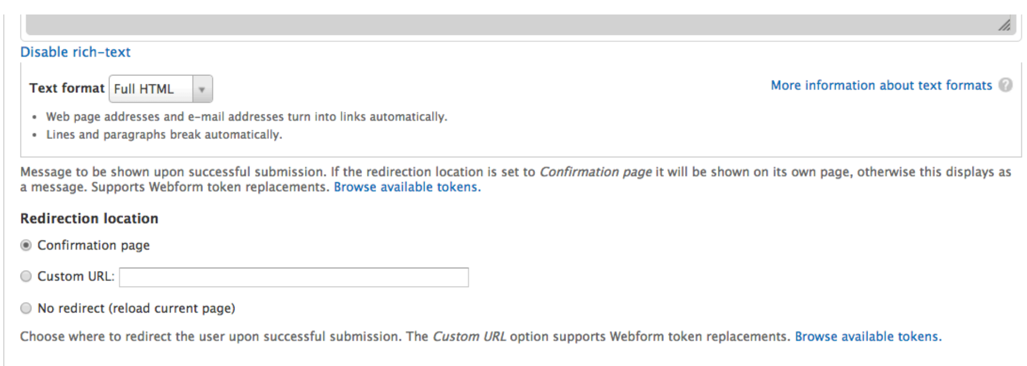
Conditionals

Can set specific logic to form

E-mails

Submitted data will go to an email

Form Settings



Confirmation Message or redirect using a custom URL

Total submissions limit

- Unlimited
- Limit to ____ total submission(s) ever

Limit the total number of allowed submissions.

Per user submission limit

- Unlimited
- Limit each user to ____ submission(s) ever

Limit the number of submissions *per user*. A user is identified by their user login if logged-in, or by their IP Address and Cookie if anonymous. Use of cookies may be modified in the global Webform settings.

Status of this form

- Open
- Closed

Closing a form prevents any further submissions by any users.

SUBMISSION ACCESS

These permissions affect which roles can submit this webform. It does not prevent access to the webform page. If needing to prevent access to the webform page entirely, use a content access module such as Taxonomy Access or Node Privacy by Role.

Roles that can submit this webform

- [x] anonymous user
- [x] authenticated user
- [ ] administrator
- [ ] faculty
- [ ] staff
- [ ] research faculty
- [ ] content editor
- [ ] Marketing
- [ ] FacultyStaff
- [ ] Student
- [ ] Alert

The *authenticated user* role applies to any user signed into the site, regardless of other assigned roles.

Total Submission Limit: Control how many users can fill the form

Per User Submission Limit: Limit a specific user on filling out the form

Save Configuration

Results

Home » Test_Training

Submissions Analysis Table Download Clear

#	SUBMITTED	USER	IP ADDRESS	OPERATIONS
There are no submissions for this form. View this form.				

Submissions: Overview of submission

Analysis: Provide general analytics on form

Table: Shows detailed information from each submission

Download: Export data to a Microsoft Excel sheet

Checklist:

- **Add Title**
- **Assign to Site**
- **Input Body Instructions**
- **Publish**
- **Create Form Fields**
- **Set up Confirmation & Form Settings**

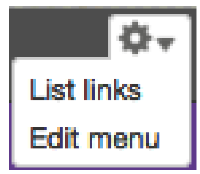
Once all the information is inserted

- **Click Save**

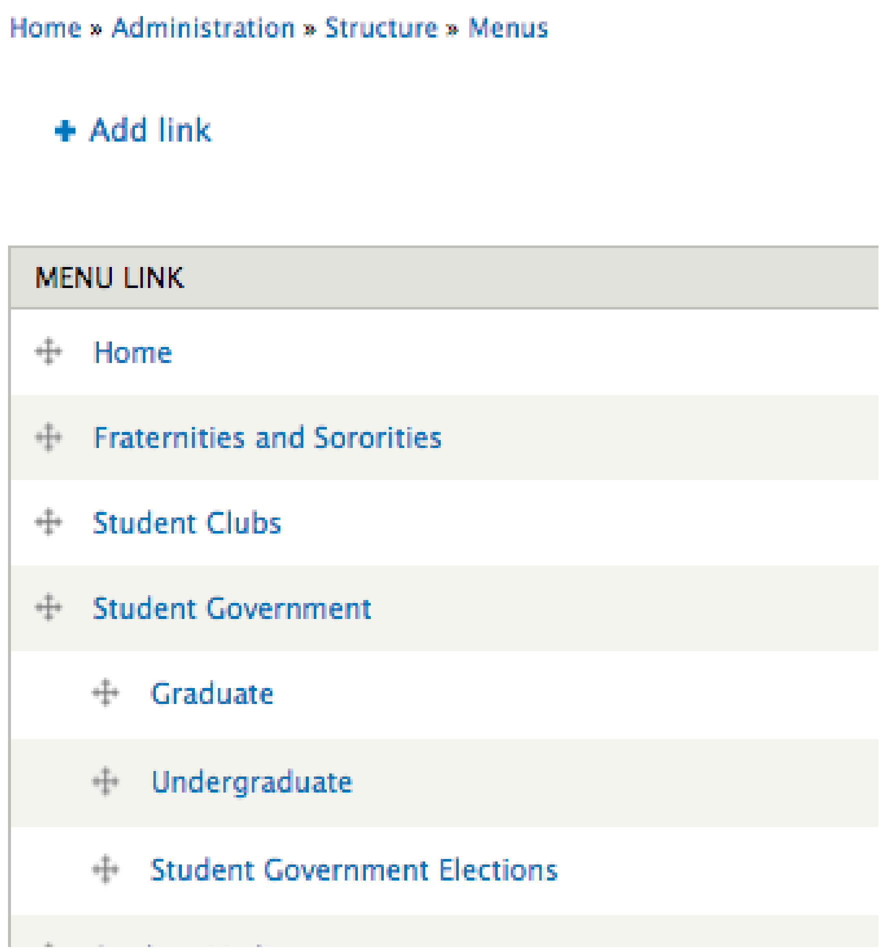
If your pages menus need to change, you can do the following:

Go to your page and in the top right of the menu, click the gear icon.

When the gear icon is clicked, you can choose two options, list links or edit menu.

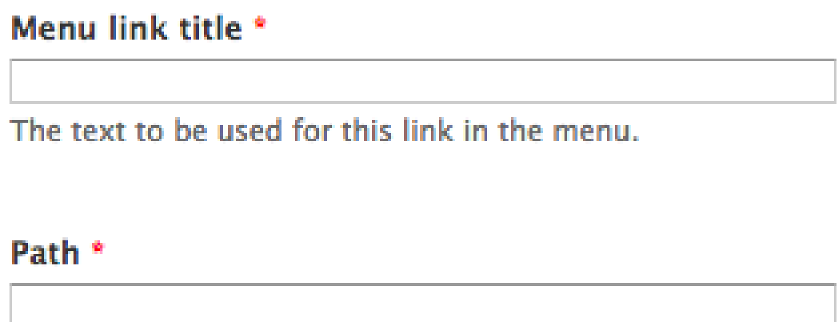


To change the content of the menu, choose List Links.
The full menu list should appear.



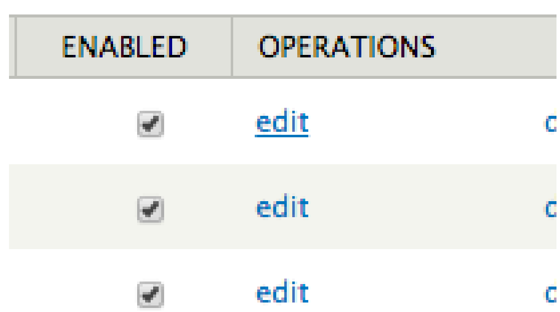
To change the content of the menu,
choose List Links.
The full menu list should appear.

Assign the menu title
followed by the menu path.



Then Press Save and the link will be the last option.

To edit current menus, click edit under operations
in List Links main page.



Edit the Title and Path and then click save. The menu link will stay in it’s position.

To disable a menu without deleting it, just uncheck the menu under enabled.