# COLORADO INTERACTIVE

AN NIC COMPANY

## Project Management Office

# Colorado Content Management Solution – Entity Admin
# Drupal 8
# User Guide
### Version 1.5.7
### 4/30/2020

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# 1. Colorado Content Management Solution Overview

The Colorado Content Management Solution (CMS) is built on the Drupal 8 platform. Drupal is an open-source CMS platform utilized for millions of websites throughout the world. Colorado Interactive (CI) built a Drupal distribution platform to provide CMS users the ability to customize their website with fewer restrictions than seen on other CMS platforms. Multiple user types exist to allow for different permissions based on the needs of the website managers. The platform facilitates a website that can be easily modified to update its look and feel, edit existing content, and publish new content.

The Entity Admin CMS role is comprised of three (3) Drupal roles: Content Admin, Structure Admin, and User Admin. For more information on the definition of CMS roles see the Glossary of Site Terms in section 24 of this user guide.

## 2. Help and Contacts

Contact your Colorado Interactive Project Manager for questions or issues when managing your content, . Once your website is live, please contact Colorado Interactive's Service Desk during business hours using the contact information below:

EMAIL: partnersupport@www.colorado.gov

PHONE: (303) 534-3468 x0
800-970-3468 (Toll Free)
(Available Monday-Friday, 8:00 a.m. – 5:00 p.m.)

**All project communications** – issues, requests, questions, and/or concerns must be sent to the Entity Project Manager, serving as the single point of contact with Colorado Interactive.

If escalation is necessary, the Entity Project Manager (EPM) will reach out to the appropriate contact at Colorado Interactive.

**Jon Miller**, Director of Project Management
(303) 534–3468 x121
jonathan.miller@www.colorado.gov

**Pre-deployment questions/issues** – Contact your Colorado Interactive Project Manager

**Post-deployment questions/issues** – Contact Colorado Interactive Service Desk

## 3. General Information
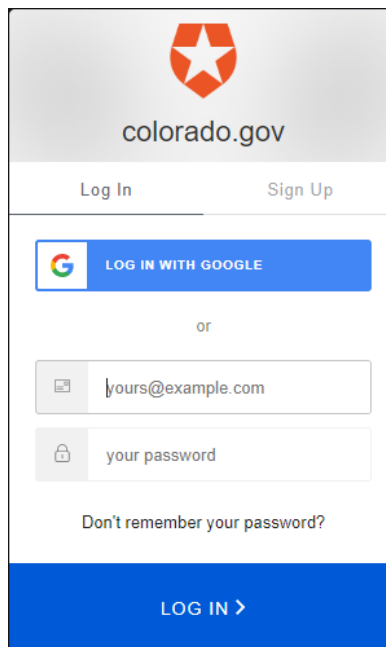
The following section provides instructions on logging in to and navigating your website, saving and publishing content, and creating revisions.

### 3.1. LOGGING IN

To log into the site, a user must have verified their email address via the SSO portal (see 3.1.1). A non-state affiliated anonymous user who wants to become an authenticated user can start by appending their site URL with /user/login and then sign up for SSO by selecting the Sign-Up tab on the login page. Alternatively, all users with an authorized state Google account are automatically signed up via SSO and simply select Log In with Google.

Next, the user must contact a User Admin, or the EPM to enable the user and assign corresponding roles for the site via the CMS. Users' SSO email and CMS email must be the same. For new users, please make sure to have the EPM fill out and send a Security Agreement to CI's Service Desk prior to provisioning a new user. Once a user is authenticated, they can log in using the following steps:

1. Navigate to your site in any browser and add the following to the URL path: /user/login.
2. Enter your credentials and select *Log in*.
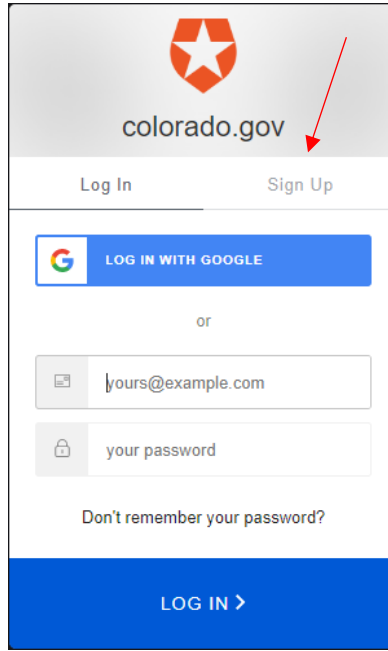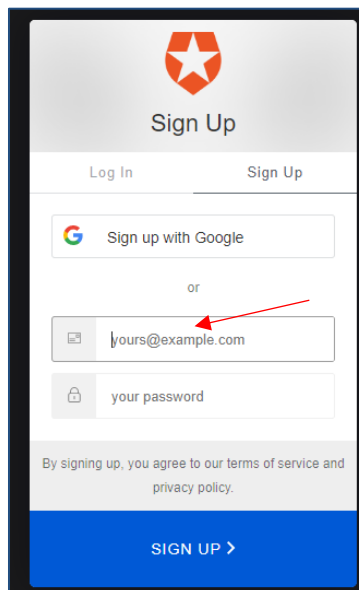


#### 3.1.1. Logging in for the first time

The first time that you log into a site is different from the other times you will be accessing the site. Follow these steps to log in for the first time:

1. Navigate to the url for your site.
2. Add /user/login to the end of the url. You will be taken to a pop up for Auth-0



3. Click *Sign Up* and enter your email and a password. The one exception to that is if you have a state Gmail address – then click "Sign up with Google".

4. You will get a verification email with a link to confirm. At this point, contact either your Colorado Interactive Project Manager (CIPM) or a user on your site who has the User Administrator role to grant you permissions.

If you are a User Administrator, see the Creating New Users section to grant permissions to the new user.

## 3.2. MENU NAMES

For reference throughout this guide; the black menu at the top of the page is the *Admin Menu*. The *Admin Menu* will change depending on the roles that a User has. The secondary menu is the *Action Menu*. The *Action Menu* has tabs that show all actions that the active User can take. Each User will have different roles, causing this menu to vary as well. Each *Action Menu* tab has a drop-down menu containing specific actions. The final main menu is the *Page Menu*. The *Page Menu* enables the active User to modify or delete a page directly.
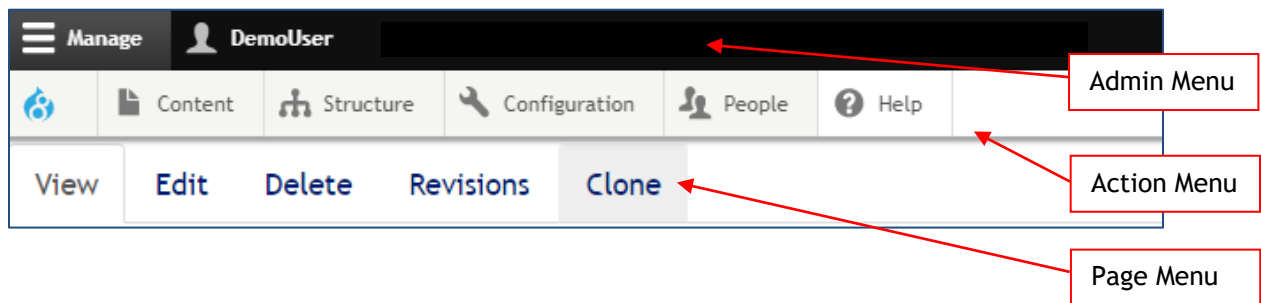


## 3.3. ADMIN MENU

When logged in, a black menu bar across the top of the page will appear. This is the admin menu. The *Administrator Admin Menu* is used to manage everything about a site.

Select on the *Manage* section to see options of *Content, Structure, Configuration, People,* and *Help*.
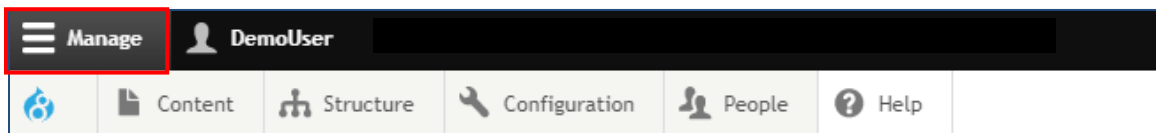
**3.3.1.Content Menu**

The easiest way to locate, edit, and delete existing content is with the *Content* view, accessible in the *Manage* > *Content* section. Specific actions can be selected directly from the drop down *Content* menu.
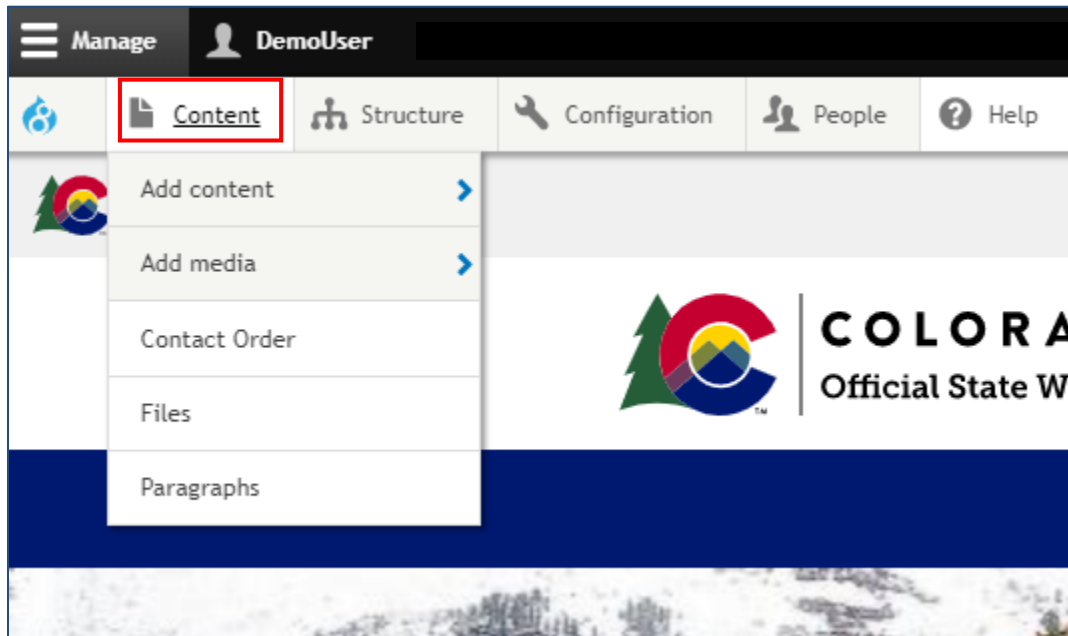


The *Content* view is a sortable table that shows all site content. Access this view by selecting *Manage* and selecting then *Content*. Users can filter content under the categories of Title, Type, Published/Unpublished, Language, or Promoted. Additionally, Users can add, view, edit, clone, or delete content directly from this view.



Another feature that is available from the *Content* view is mass operations. Mass operations allow the active User to delete, make sticky or unsticky, promote or demote, publish or unpublish, save, or update the URL aliases for multiple pieces of content at a time.

**Action**

Delete content ▼

| Delete content |
| Make content sticky |
| Make content unsticky |
| Promote content to front page |
| Publish content |
| Save content |
| Remove content from front page |
| Unpublish content |
| Update URL alias |

| | ENT | AUTHOR | STATUS | UPDATED ▼ | OPERATIONS | PROMOTED |
|---|---|---|---|---|---|---|
| | page | | Published | 04/25/2019 – 12:09 pm | Edit ▼ | No |
| ☐ Echo Lake | Basic page | | Published | 04/25/2019 – 12:07 pm | Edit ▼ | No |

Within the *Content* view the User can also manage Layouts, Files, Paragraphs, and Media.

## Content

| Content | Layouts | Files | Paragraphs | Media |

Overview      Moderated content

Home » Administration
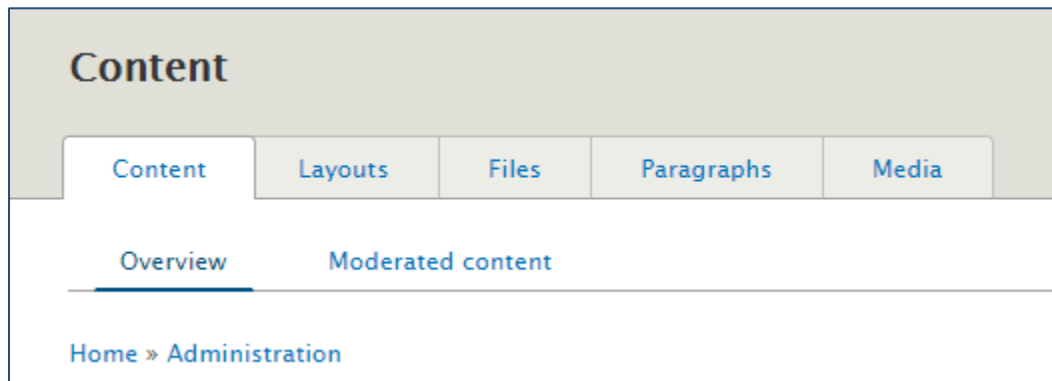
### 3.3.2. Structure Menu

The *Structure* menu allows the User structure and format content for individual pages as well as the entire site. By hovering over the *Structure* tab, a drop-down menu of all editable processes appears. When the *Structure* tab is selected the active User is taking to a page with short descriptions of each of these. This menu is where the User can edit menus, webforms, and custom blocks.
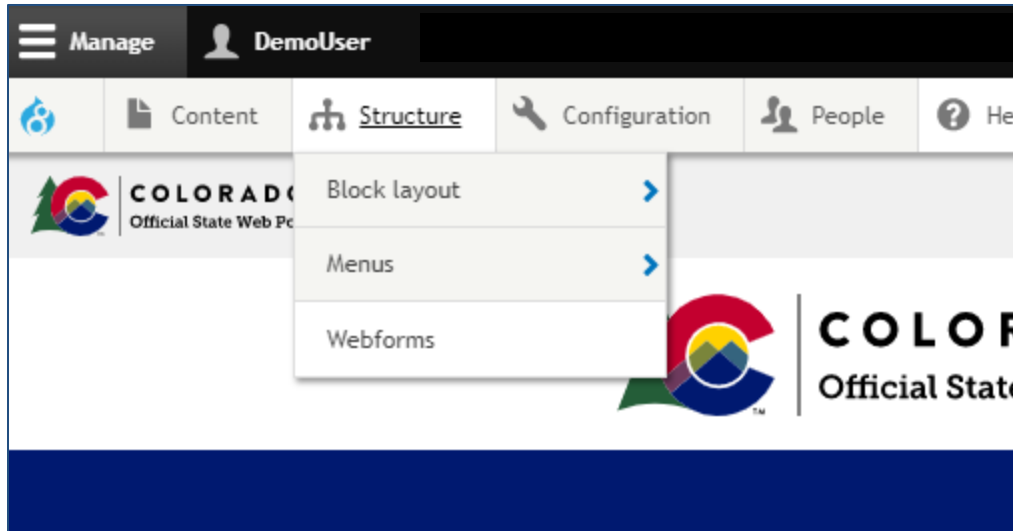
### 3.3.3.Configuration Menu

The *Configuration* menu is where the User can manage settings for the entire site. When *Configuration* is selected, the active User is brought to a page with descriptions of each of the configurable groups.
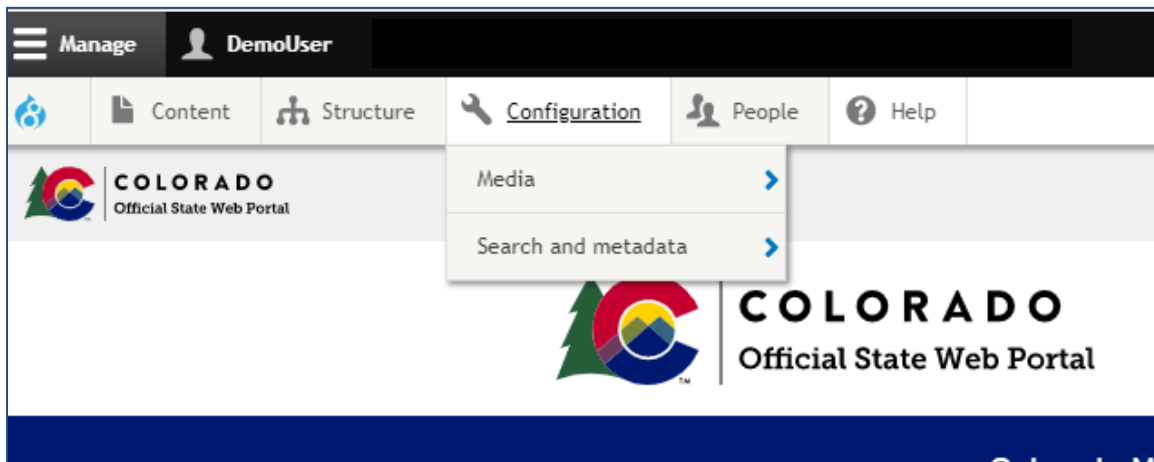


### 3.3.4.People Menu

When *People* is selected in the *Manage* menu, the *People* view appears. Under the *People* view, the User Admin can search for Users by filtering based on name or email, status, role, and permissions.

For more information on creating new users see section four.

## 3.4. PUBLISHING

After creating content, the default *Save* settings are shown at the bottom of the page. Select the *Publish* option in the dropdown at the bottom of the page to publish the content to the current site. To save a draft, select the *Draft* option in the dropdown at the bottom of the page. A draft will not be visible to anonymous users. Ensure that after a selection has been made, *Save* is selected.
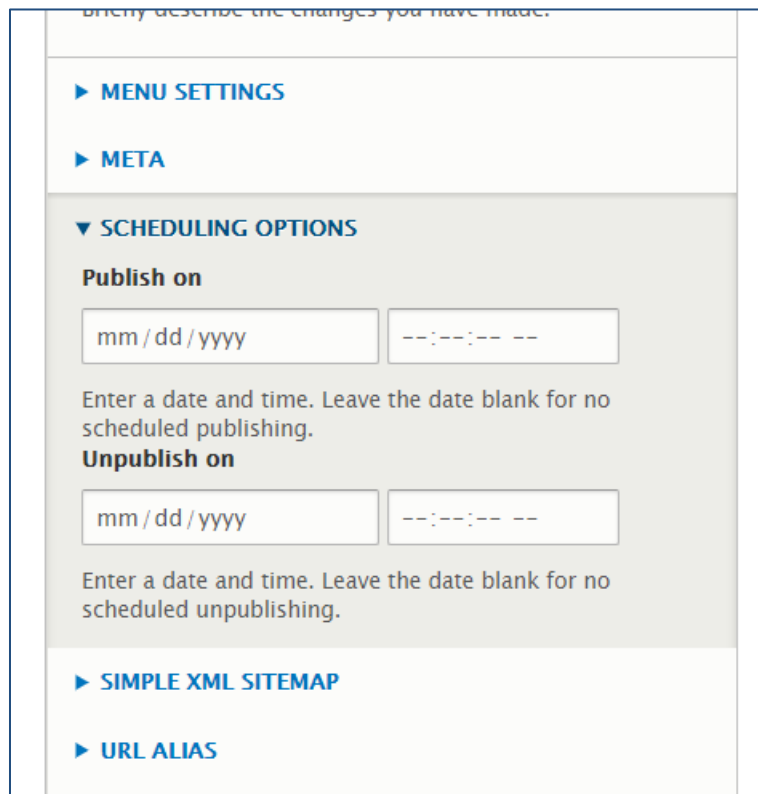


Any links to unpublished content will result in an error message for anonymous users; authenticated users will see unpublished content with a light pink background.
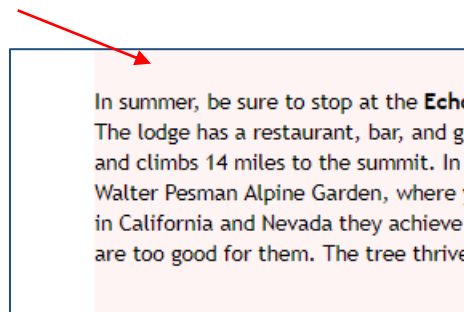
## 3.5. SCHEDULED PUBLISHING

Saving Content with the selection of *Publish* or *Unpublish* causes content to instantly be available to or hidden from anonymous visitors to the site. Content can also be scheduled to publish and/or unpublish at a specific time and/or date.

1. Select *Edit* on the page with content to schedule.
2. On the far-right side of the screen there is a box detailing settings for that page. Select the *Scheduling Options* section.
3. Enter the date and time to publish and/or unpublish the content.
    a. Note that this feature uses a 24-hour clock.
4. At the bottom of the page, set the selection box to *Publish* and select *Save*.



## 3.6. PUBLISHING STATES

There are three different publishing states on the site. Depending on where you are in the lifecycle of a page you will see different settings.

- *Draft*: A page is a draft if it either has never been published, or if it has been published and then saved as a draft.
- *Published*: A page is published and viewable by all users.
- *Archived*: A page is that was at one time published that is now entirely unpublished and not viewable by anonymous or unauthenticated users.

If you have a page that is published and save it as a *draft,* it will do 2 things. The first is a view only version of the page will be produced that will remain live and viewable to the anonymous or unauthenticated user. The second is a "Latest Version" will be created. The Latest Version can be found in the Latest Version tab in the page menu, or in the moderated content library in your all content library. The Latest Version will be where all changes are made. As soon as the Latest Version is published, the view only version vanishes, and the page is now updated. To use these publishing states with user roles please view the managing the workflow section.

## 3.7. MANAGING THE WORKFLOW

On the new Drupal 8 platform there are five potential user roles. The user roles allow for content moderation. Moderated content is content that is created but needs review from a content administrator.

1. The *Content Administrator* is the only content focused role that can publish and edit all parts of the site.
2. The *Content Manager* can publish and edit all content except landing pages.
3. The *Content Editor* cannot publish or work on landing pages either and can also not publish basic pages. However, the content manager can edit basic pages which can be moderated by the content manager and administrator. This moderated content can be found my navigating to the moderated content view from the all content view.
4. The *User Administrator* can manage user accounts for the content management solution (CMS).
5. The *Structure Administrator* can access and manage custom blocks.

For more information on user roles please see the glossary of terms at the end of this guide for a chart of user roles and their associated permissions.

### 3.8. CREATING REVISIONS

When edits are made to a page, a *revision* is automatically generated. These can be reverted to later. There is an option to add comments to each revision. These comments are called revision log messages. To save a new revision log messag*e*:

1. Go to the far right of the page that is being edited and find the *Revision Log Message* box.
2. Log a message into the box.
3. Select *Save* at the bottom of the page.

**Published**
*Last saved: 04/25/2019 – 10:19 am*
**Author:**
☑ Create new revision
        Revisions are required.
**Revision log message**



Briefly describe the changes you have made.

### 3.8.1. Reverting Content to a Previous Version

Pages can be reverted to previous versions because new revisions are automatically saved. To revert content:
1. Select on the *Revisions* tab in the page menu.

*Edit Landing Page* Home

| View | Edit | Delete | Revisions | Clone |

Home » Node
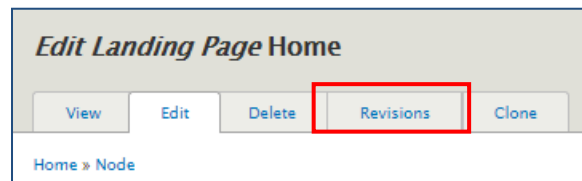
2. Find the version which will be published.
3. Select on the *Revert* button in the *Operations* column.

| | |
|---|---|
| 05/03/2019 – 04:17 pm by ci-admin | Revert ▾ |
| 05/03/2019 – 04:04 pm by ci-admin | Revert ▾ |
| 05/03/2019 – 04:02 pm by ci-admin | Revert ▾ |
| 05/03/2019 – 04:01 pm by ci-admin | Revert ▾ |
| 05/03/2019 – 04:00 pm by ci-admin | Revert ▾ |
| 05/03/2019 – 04:00 pm by ci-admin | Revert ▾ |

4. Confirm the reversion by selecting the *Revert* button on the confirmation page.

## 4. Creating New Users

User Admins can provision new Users for their site(s). The Entity Project Manager (EPM) must email a completed Security Agreement to partnersupport@www.colorado.gov for each new User created. Before a User Admin can provision a user, that User must sign up for Single Sign On (SSO) using Auth-0 as described in section 3.1 of this user guide.

Once a new User has signed up via SSO, the User Admin can navigate to that User under the People tab and edit the User to add the necessary roles.

1. Go to *People*.
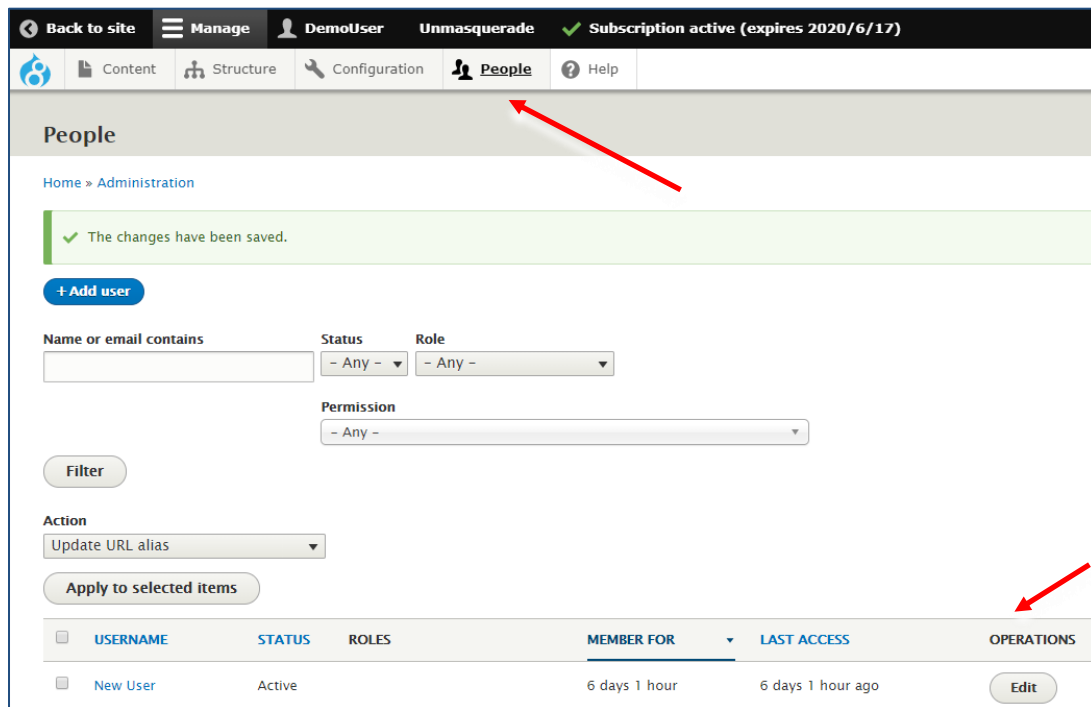


2. Select *Edit* in the operations column.
3. Add roles to the User by checking the check boxes.
4. Do **not** update the User's password or other profile info.
5. Select *Save* at the bottom of the page.

User Admins can also cancel an existing User by Admin selecting that User under the People tab and edit the User Roles to remove the as necessary.

User Admins must be mindful that once a User account is canceled the content created by a User is deleted.  Once deleted, this content cannot be retrieved.

**Roles**

☑ authenticated user
☐ Support Administrator
☐ User Administrator
☑ Administrator
☐ Content Administrator
☐ Content Manager
☐ Content Editor
☐ Structure Administrator

**Display Name**

[user:field_first_name]

Your name as visitors of the site will see it.

**First Name**

**Last Name**

**Site language**

English ▾

This account's preferred language for emails. This is also assumed to be the primary language of this account's profile information.

▾ **CONTACT SETTINGS**

☑ Personal contact form

Allow other users to contact you via a personal contact form which keeps your email address hidden. Note that some privileged users such as site administrators are still able to contact you even if you choose to disable this feature.

**Save**   Cancel account

## 5. Creating a Page

There are 2 options for pages. The *Basic Page* is a standard internal page.
There is also the option to create a *Landing Page*. You can create many of each
type of page on your site.
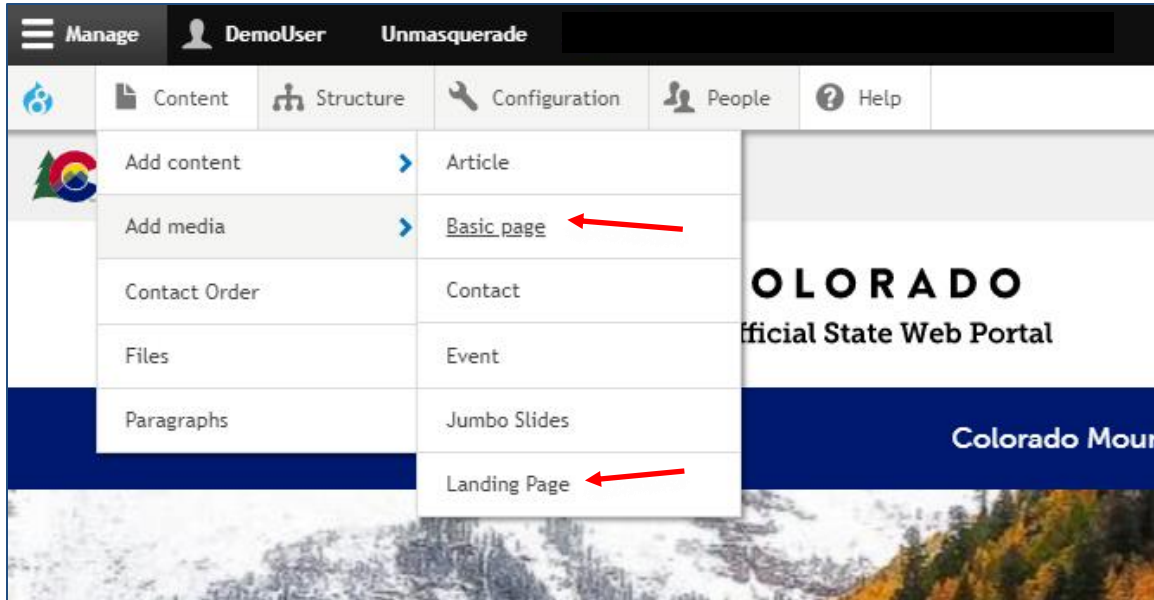


### 5.1. BASIC PAGE

1. Go to *Manage > Content > Add Content > Basic Page*.
2. Title your page.
3. Populate the content of your page within the WYSIWYG area, or using Rows and Cards (will explain in Section 7)
4. Select *Save* at the bottom of the page.

### 5.2. LANDING PAGE

1. Go to *Manage > Content > Add Content > Landing Page*.
2. Title your page.
3. Select Jumbotron settings
4. Select Display settings
5. Populate the content of your page within the WYSIWYG area, or using Rows and Cards (see Section 7)
6. Select *Save* at the bottom of the page.

### 5.3. CLONING A PAGE

Often if there is a complex layout to a page that you would like to replicate,
you can clone the page. If you are wanting to have the page cloned more than
once, we recommend adding the page to Layouts (see the section on Layouts
for more information).

Note: Cloning a page will not apply menu settings, display settings, or search enhancements to the cloned page.

To clone a page follow these steps:
1. Click *Clone* in the page menu.
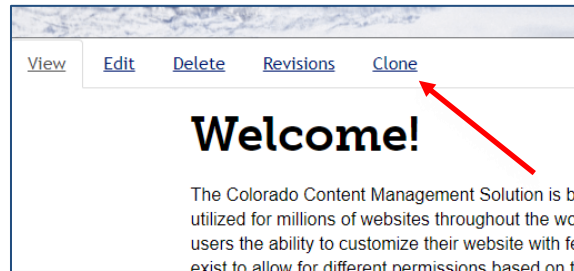


2. Note that the page menu should now be on the Clone tab.
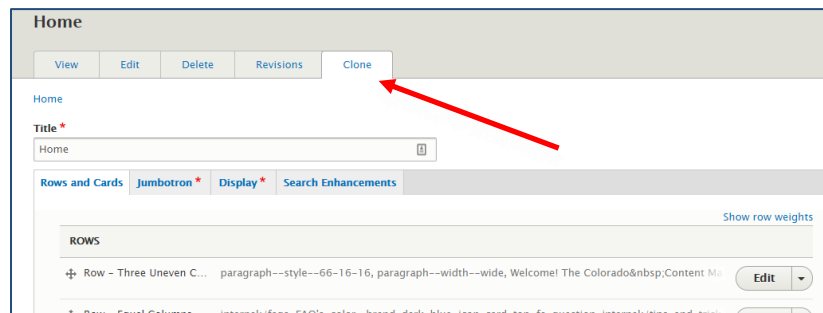


3. Change the title of the page.
4. Modify any content on the page.
5. If you are going to be making many changes, we recommend saving the page as a draft and accessing it through your content library while in the build stage.
6. Add the page to any menu using the menu settings on the right side of the page.
7. Add any display settings and search enhancements.
8. Click *Save* at the bottom of the page.

## 5.4. CONTENT ORGANIZATION OPTIONS

### 5.4.1. What are Rows and Cards?

The Drupal 8 platform implements an organizational system of *Rows and Cards*. To use this system; select the *Rows and Cards* tab on the editing page.
1. Rows organize content in horizontal rectangles with set widths depending on Row selection. The height of a Row is set by the amount of content contained in its Cards.
2. Cards organize content by type.

A visual of this is shown in the diagram below. The diagram shows 2 rows (black) on a page (blue). In this case the top row contains 3 cards (white).
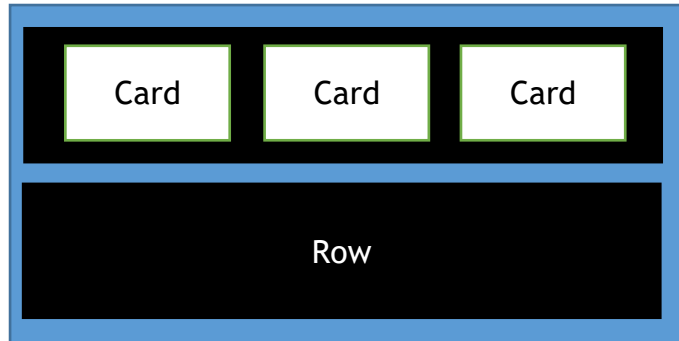


### 5.4.2. Build with Rows and Cards

To build a page using *Rows and Cards*, Edit or Create a page and navigate to the *Rows and Cards* tab. Add a *row* to the page. The default row selection is *Add Row – Equal Columns*.



Next, add a *Card* to the *Row*. The default *Card* selection is *Add Card - Basic*.

Each row is customizable by using the tabs within that element. Additionally, each row may be moved up or down on the page by selecting the drag and drop icon ✥ then placing the row in the desired location. Cards may be rearranged within its row in the same way.



Select *Save*.
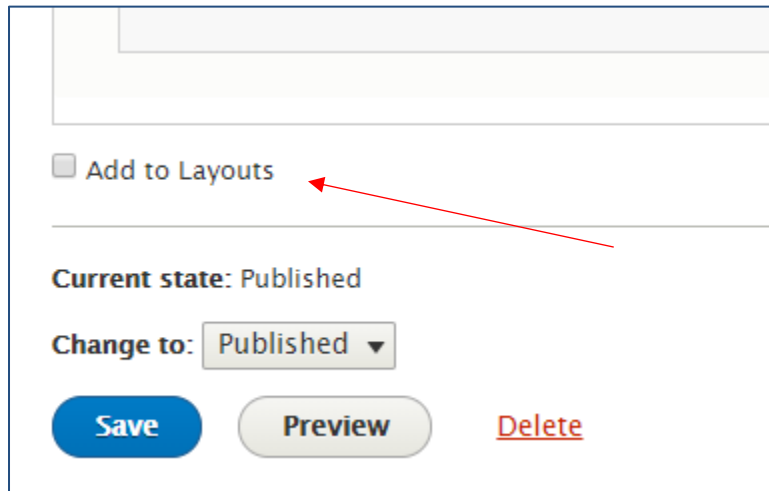
Section 7 will contain more details on Rows and Cards.

## 5.5. LAYOUT OPTIONS

1. Create the page.
2. Check the *Add to Layouts* checkbox at the bottom of the page.
3. Select *Save*.
4. Navigate to the layouts page at *Manage > Content > Layouts*.
5. Select the desired Layout, and in the Operations column, select *Clone*.
6. Rename the page, edit as desired.
7. Verify the *Add to Layouts* checkbox is no longer checked
8. Select *Save*.
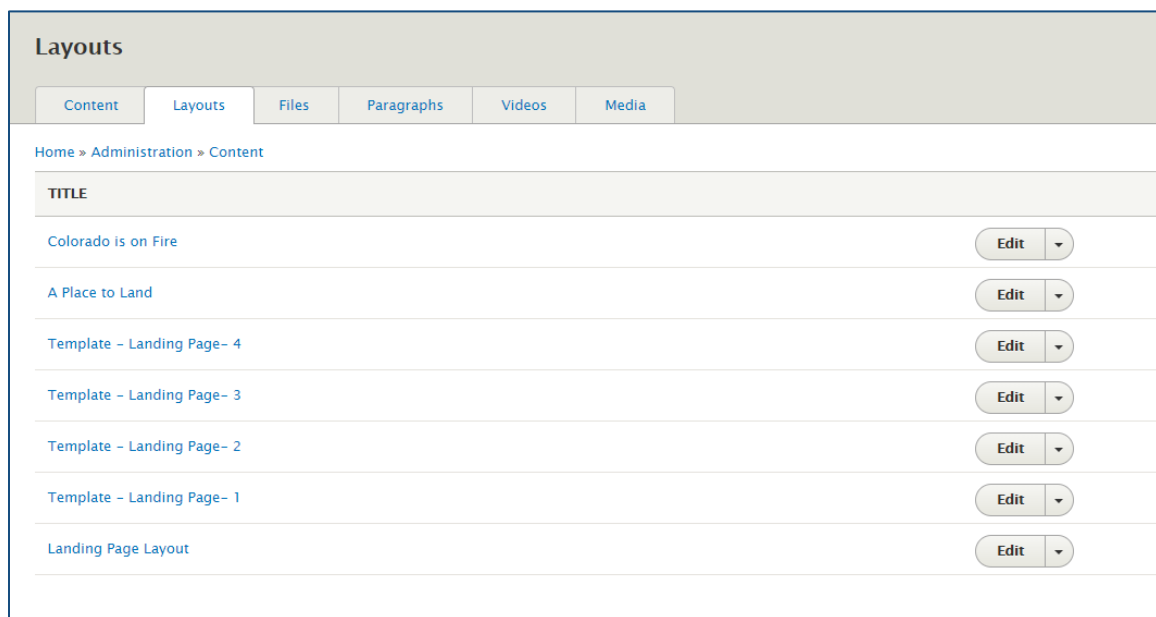
When creating many pages of content, often a certain layout will need to remain constant across the site. A page can be saved into layouts by selecting the small check box above the publishing section.



Once *Save* is selected, this page will now be stored in the Layouts view. Locate the Layouts view by following the path *Manage > Content* and then selecting the tab *Layouts*.



To use a layout to make a new page, select the arrow to the right of edit and select *Clone* from the drop down. Now there is a new page. Remember to change the page title.

Layouts are a simple way to duplicate page structure to add uniformity and easy recognition to a site.

# 6. Using Rows and Cards

Content organization is a vital part of making an interesting and accessible website. The organization system on this platform is a *Rows and Cards* system. A *Row* is a horizontal section of a page and a *Card* is a content container. A *Row* must be created before a *Card* can be placed. It is not required to utilize this system, in which case content can be added into the WYSIWYG body section, however, that is not recommended.

## 6.1. ROWS

*Rows* are the way that content is organized horizontally on a page. To organize content vertically, use multiple *Rows*. *Rows* can be customized by changing their titles, color, and widths. Additionally, there are multiple choices for kind of *Row*. Once a *Row* has been selected, *Cards* are added, some of which can be edited with the WYSIWYG.
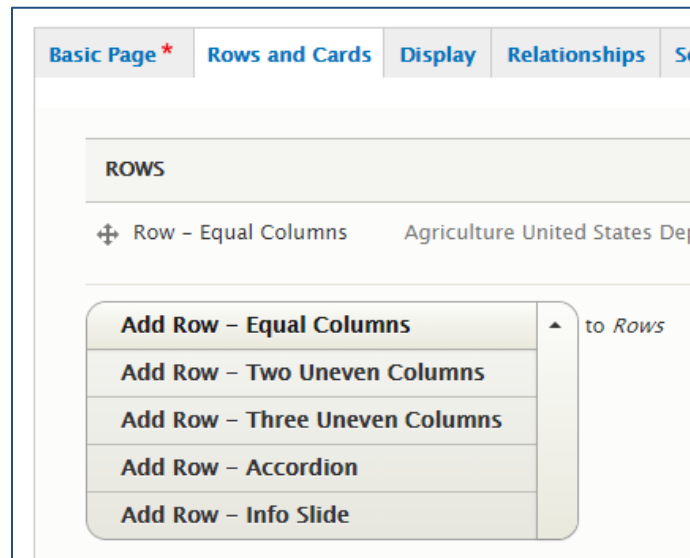


*Note: For landing pages there are three additional row types. These are the three hero rows. A hero row can have an image in it that stretches across the width of the window like the jumbotron. If you want to add a hero row into your basic page, you can do so by adding an info slide row and adding hero rows within that.*

### 6.1.1. Equal Columns

The default row format has equal columns. In this row, all cards are given the same width. If you only place one *Card* into the *Row,* then that *Card* will be the entire width of the *Row*. If two *Cards* are placed, each will be half the width, and so forth. It is recommended that no more than six *Cards* are placed per *Row*.

Equal Column Row

Mollis aliquam ut porttitor leo a diam. Sagittis id consectetur purus ut faucibus. Volutpat lacus laoreet non curabitur gravida arcu ac tortor. Purus in massa tempor nec feugiat nisl pretium fusce id. Consequat semper viverra nam libero justo laoreet sit. Nisl nisi scelerisque eu ultrices vitae auctor eu augue ut. Eget mi proin sed libero enim sed faucibus turpis. Sapien pellentesque habitant morbi tristique senectus. Vitae proin sagittis nisl rhoncus mattis. Nulla aliquet enim tortor at auctor urna nunc id. Porttitor lacus luctus accumsan tortor posuere ac. Non tellus orci ac auctor augue mauris augue. Vel orci porta non pulvinar neque laoreet suspendisse.

*This image is to show column width – the text is lorem ipsum*

### 6.1.2. Two Uneven Columns

The Row selection for two uneven columns also allows for the active User to customize the width of those columns.



The width choices include: $\frac{3}{4}$ and $\frac{1}{4}$, $\frac{2}{3}$ and $\frac{1}{3}$, $\frac{1}{4}$ and $\frac{3}{4}$, and $\frac{1}{3}$ and $\frac{2}{3}$. Shown below is the default $\frac{3}{4}$ and $\frac{1}{4}$ width selection.

Two Uneven Columns Row

Mollis aliquam ut porttitor leo a diam. Sagittis id consectetur purus ut faucibus. Volutpat lacus laoreet non curabitur gravida arcu ac tortor. Purus in massa tempor nec feugiat nisl pretium fusce id. Consequat semper viverra nam libero justo laoreet sit. Nisl nisi scelerisque eu ultrices vitae auctor eu augue ut. Eget mi proin sed libero enim sed faucibus turpis. Sapien pellentesque habitant morbi tristique senectus. Vitae proin sagittis nisl rhoncus mattis. Nulla aliquet enim tortor at auctor urna nunc id. Porttitor lacus luctus accumsan tortor posuere ac. Non tellus orci ac auctor augue mauris augue. Vel orci porta non pulvinar neque laoreet suspendisse.
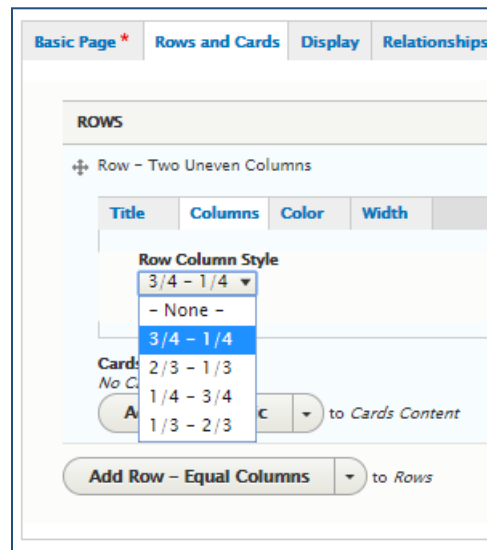
Mollis aliquam ut porttitor leo a diam. Sagittis id consectetur purus ut faucibus. Volutpat lacus laoreet non curabitur gravida arcu ac tortor. Purus in massa tempor nec feugiat nisl pretium fusce id. Consequat

*This image is to show column width – the text is lorem ipsum*

### 6.1.3. Three Uneven Columns

The Row selection for three uneven columns also allows for the active User to customize the width of those columns.
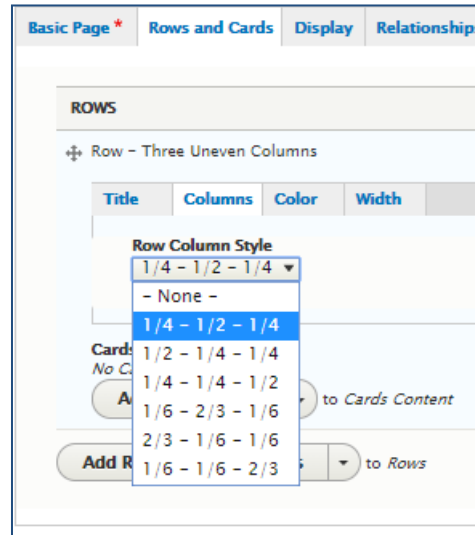


The width choices include: $\frac{1}{4}$ and $\frac{1}{2}$ and $\frac{1}{2}$, $\frac{1}{2}$ and $\frac{1}{4}$ and $\frac{1}{4}$, $\frac{1}{4}$ and $\frac{1}{4}$ and $\frac{1}{2}$, $\frac{1}{6}$ and $\frac{2}{3}$ and $\frac{1}{6}$, $\frac{2}{3}$ and $\frac{1}{6}$ and $\frac{1}{6}$, and $\frac{1}{6}$ and $\frac{1}{6}$ and $\frac{2}{3}$. Shown below is the default $\frac{1}{4}$ and $\frac{1}{2}$ and $\frac{1}{4}$ width selection.
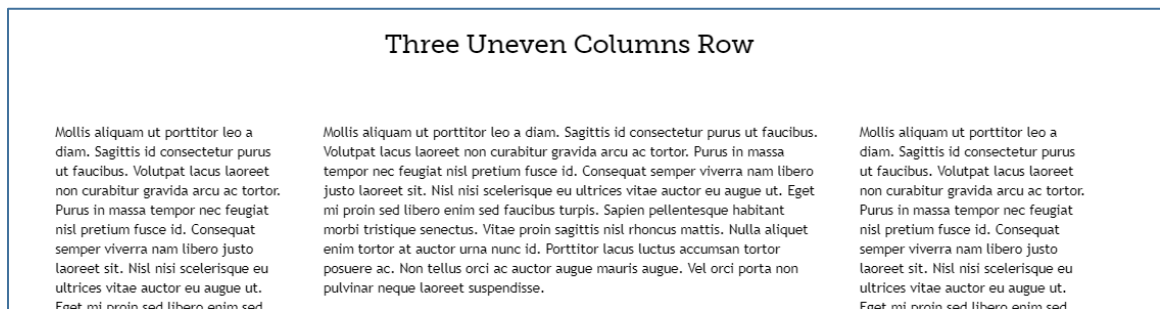


*This image is to show column width – the text is lorem ipsum*

### 6.1.4. Accordion

The row selection of *Accordion* allows the webpage content to be minimized into containers that can be selected to open a view of additional content without switching pages.
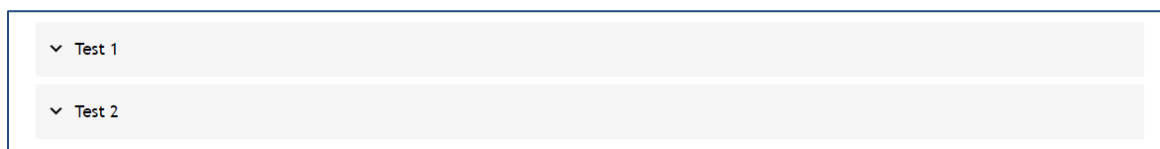


### 6.1.5. Info Slide

An Info Slide row allows for multiple rows to be automatically cycled through across the screen. The Info Slide row can hold multiple rows in it, and within those rows, multiple cards. This *Row* allows for content to be vertically compressed and then cycled through horizontally. The info slide row also allows for the use of hero rows. Info Slide Rows are the only way that hero rows can be added to basic pages.

## 6.2. CARDS

### 6.2.1. Basic Cards

A Basic Card contains a title field and a body field with a WYSIWYG. When creating or editing this card there are the options to add attachments, change the card color, and add a border.
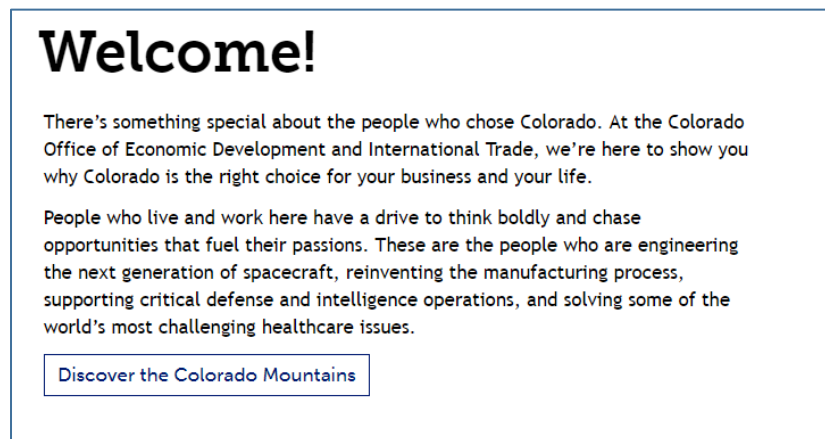


### 6.2.2. Map Cards

A Map Card contains the view of a specified map. When creating a Map Card, the necessary information is only the location. A title, title color, and background color for the card can also be specified.
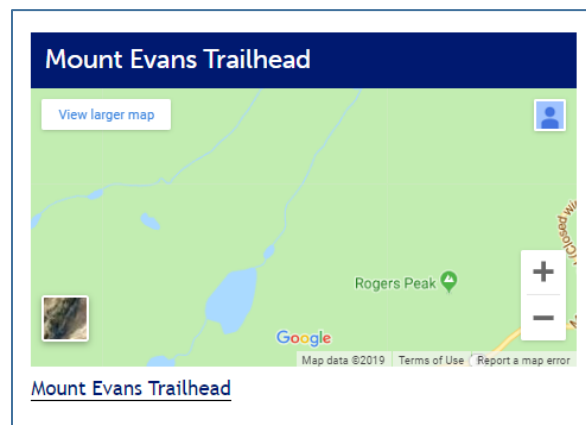
### 6.2.3. Carousel Cards

Carousel Cards show slides within a row. These are like the info slider rows but reside in a card. When created, they can be customized by changing the slide interval time as well as adding multiple images or links to be cycled through.

### 6.2.4. Tabs Cards

The Tabs Card allows for the creation of tabs of content within a row. These tabs can be populated with WYSIWYG body sections as well as customized with background colors. The only required piece of information for this card is the Tab Title.
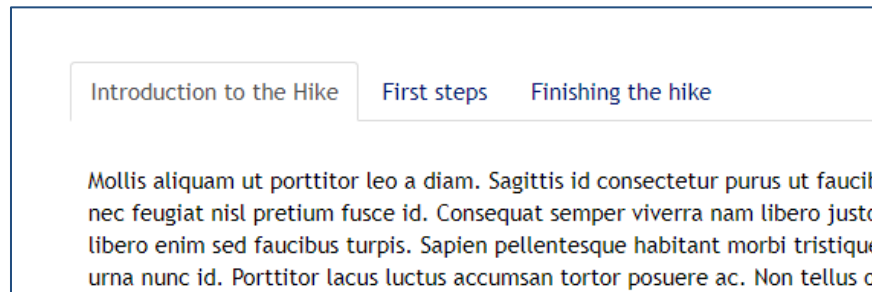


### 6.2.5. Block Cards

Block Cards show any custom blocks that were created (row or basic). Custom block creation will be discussed in section 21. Once a custom block is created and named, its name will appear in the list of possible custom blocks to add in this Card.

### 6.2.6. View Cards

A View Card is a card showing the title and a short description of a collection of events (in a mini calendar month or week, or in an upcoming events view), news articles, blog posts, and press releases. When a View Card is placed, the kind of collection is specified in the View box and the Display ID is also specified.

AUGUST 15, 2019

## Colorado Article

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas consectetur varius consectetur. Curabitur a turpis feugiat, malesuada magna ac, posuere dolor. Nam eget nunc at diam tincidunt lacinia. Curabitur nec urna turpis. Ut auctor lectus vel aliquet facilisis. Nullam odio est, interdum at dictum vitae, rhoncus tempor neque.

MAY 28, 2019

## Colorado has Ski Resorts

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. 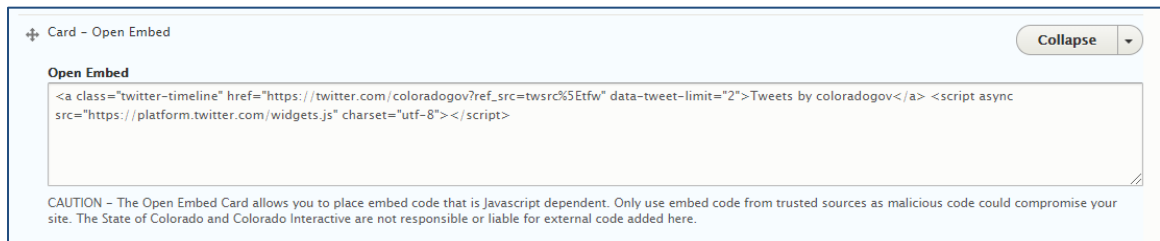Ultricies mi quis hendrerit dolor magna eget est. Fermentum iaculis eu non diam phasellus. Ac placerat vestibulum lectus mauris ultrices eros in cursus. Praesent elementum facilisis leo vel fringilla est ullamcorper eget.

MAY 28, 2019

## Colorado is Great

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ultricies mi quis hendrerit dolor magna eget est. Fermentum iaculis eu non diam phasellus. Ac placerat vestibulum lectus mauris ultrices eros in cursus. Praesent elementum facilisis leo vel fringilla est ullamcorper eget.

View All

### 6.2.7. Open Embed Cards

An Open Embed Card allows for the inclusion of code on a page. This code could enable a twitter feed to be shown, a YouTube video, and many other things. This card minimizes the changes that need to be made to the source code for these features.
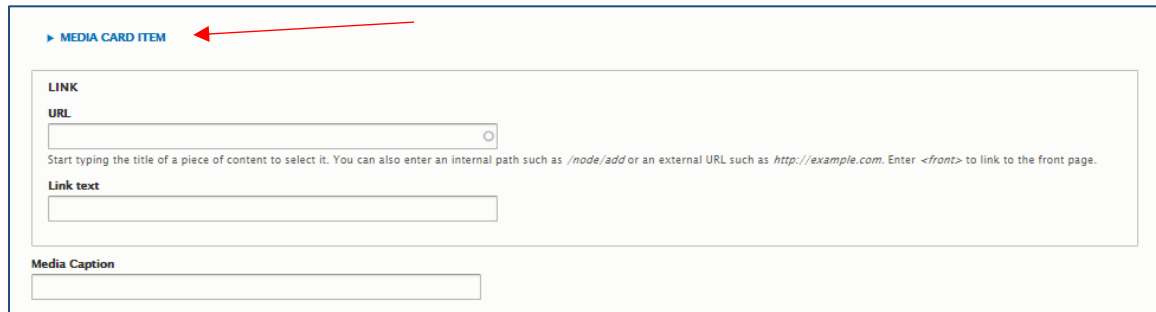
⊹ Card – Open Embed                                    Collapse  ▾

**Open Embed**

```
<a class="twitter-timeline" href="https://twitter.com/coloradogov?ref_src=twsrc%5Etfw" data-tweet-limit="2">Tweets by coloradogov</a> <script async src="https://platform.twitter.com/widgets.js" charset="utf-8"></script>
```

CAUTION – The Open Embed Card allows you to place embed code that is Javascript dependent. Only use embed code from trusted sources as malicious code could compromise your site. The State of Colorado and Colorado Interactive are not responsible or liable for external code added here.

### 6.2.8. Icon Cards

Icon Cards are blocks of space that are reactive and link. The features of an Icon Card include icon text, icon position, icon, link URL, link text and color.

**Division of Grasses**
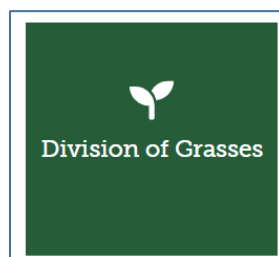
**6.2.9.Media Cards**

Media Cards are cards that just contain an image and can have captions.
Media cards can be populated using media already existing in the media
library, or by uploading media through the card into the media library. A
link can be added to media cards to make them selectable. Media cards
cannot be sized individually and are scalable based on the content added
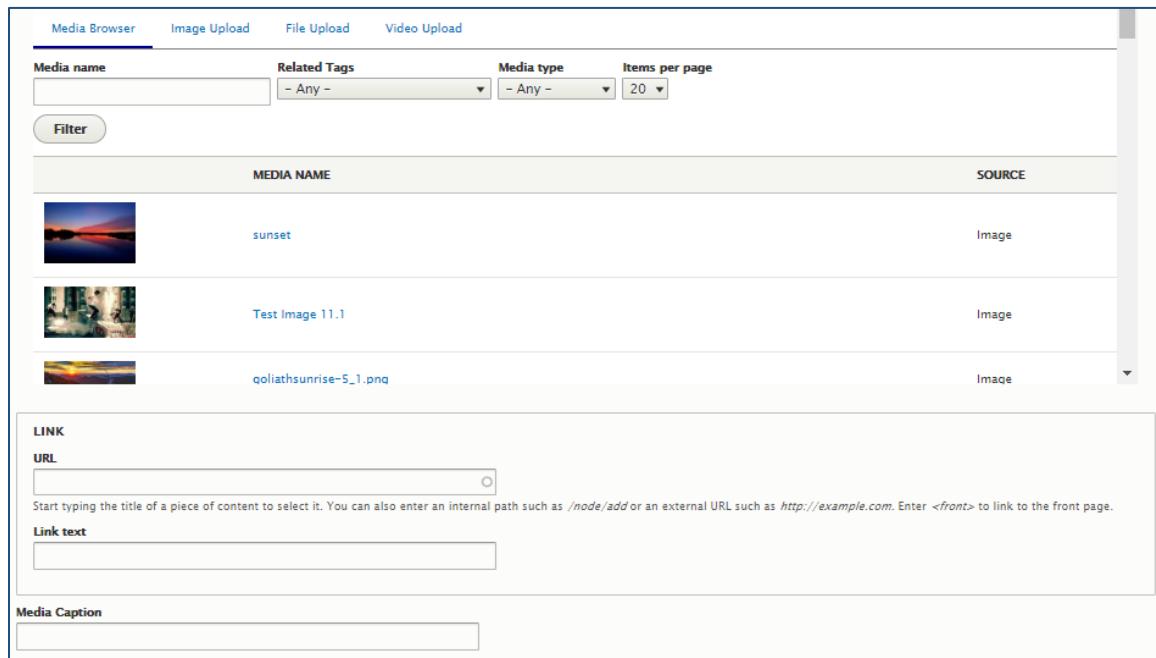around them.



When using a media card, you have the opportunity to upload an image directly
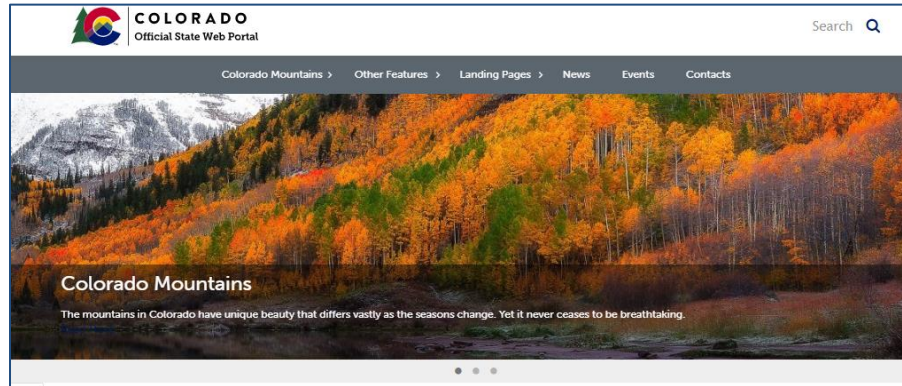to the card and also have that piece of media be stored in the media library.



## 6.3. LANDING PAGE SPECIFICS

**6.3.1.Jumbotron**

When editing a landing page there is a tab for Jumbotron. The User can select a Jumbotron template and then populate the Jumbotron using a Banner Title, Banner Body, Link, and Images.



Jumbotrons can be edited from the Jumbotron tab by following the steps to edit a page and then navigating to the Jumbotron tab. There are a few different kinds of Jumbotrons that can be added to a landing page. These are *No Jumbotron, Refer Sliders, Jumbotron Now, Show Site Jumbotron,* and *Show Alternate Jumbotron.*
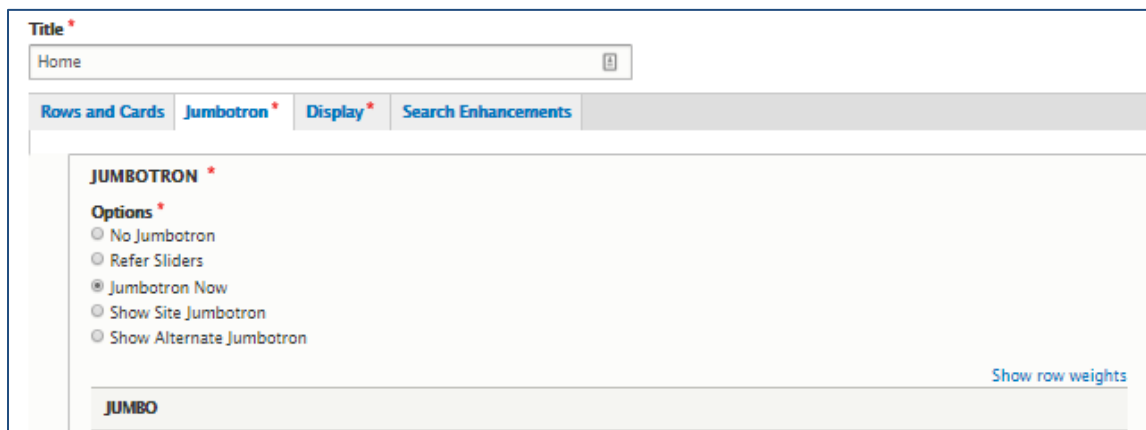


Each type of Jumbotron functions the same to the anonymous user. The differences are which slides are used. The *No Jumbotron* option uses no slides and removes the jumbotron section from the page. The *Refer Sliders* option allows the User select from the list of previously created Jumbo Slides to use. The *Jumbotron Now* option allows the User to create slides in the moment. The *Show Site Jumbotron* is a specific Jumbotron edited in the custom block library that can be easily added across site landing pages. The *Show Alternate Jumbotron* is a secondary *Site Jumbotron.*

Each Jumbotron can be made up of many Jumbo Slides. Jumbo Slides can be created by following these steps:

1. Add your Jumbotron image to the media library by following the path *Manage > Content > Add Media > Image*.
2. Navigate to *Manage > Content > Add Content > Jumbo Slides.*
3. Add a title.
4. Add a body section if desired. (optional)
5. Upload a Jumbotron Image from the media library.
6. Select the Published checkbox.
7. Select *Save* at the bottom of the page.



Jumbo Slides are then added to the page by editing the page, navigating to the jumbotron tab, selecting refer slides and then checking the boxes of the slides. Note that the slides will not show up in this view if you did not check the published box when creating the jumbo slide. You can check this box by navigating to the content view, finding the jumbo slide, editing it, and selecting the published button.

# 7. The Entity Header

Each entity must add a logo or text of their entity name into the branding section of their site. To add your image here please email the appropriate contact with a .svg or .png file to be added to this section of your site by our development team.

If you are in your project, please email your Colorado Interactive Project Manager (CIPM).

If your site is live, please email the Colorado Interactive Service Desk at partner.support@ww.colorado.gov.
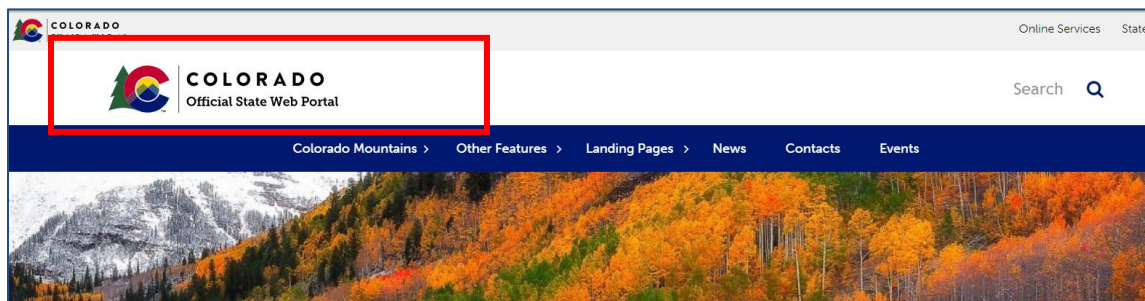


Alternatively, if you do not have a specific logo that you would like to add, you can choose from 6 options of prepared logos that we provide for you.



*Sample style options*

## 8. Using the Media Library

A new CMS organization tool on the Drupal 8 platform is libraries. There are many libraries for different kinds of content that can be found from the action menu. Content in these libraries is reusable across the site. The main library is the All Content library found by selecting the Content tab in the action menu. From this library there are tabs for the File Library and the Media Library. There are other libraries for Layouts, Paragraphs, Scheduled Updates and Videos in this view as well.
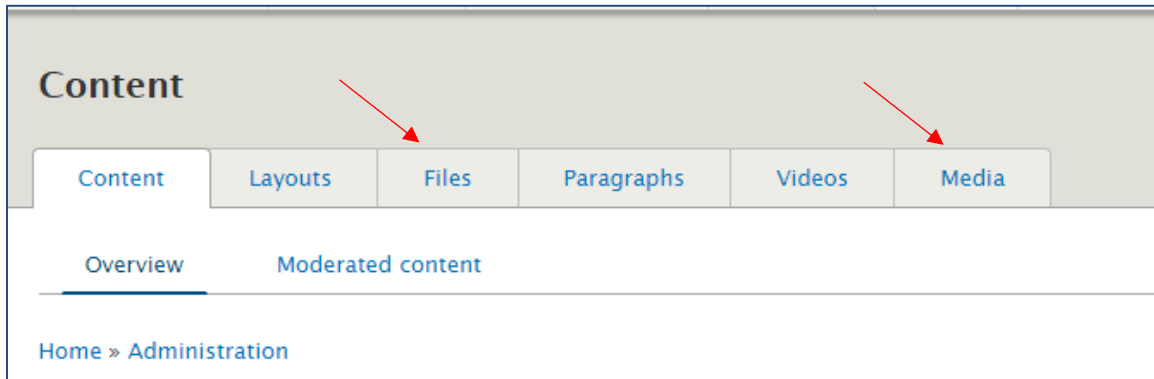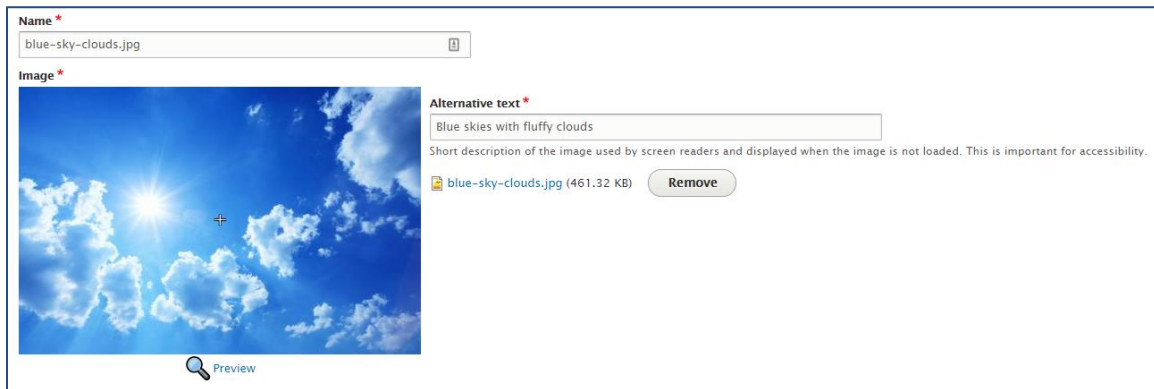


### 8.1. THE MEDIA LIBRARY

The media library is the place all site media content lives when uploaded through the Add Media. The media that is uploaded to this library can be added from the WYSIWYG image icon as well as be linked to using the Link-It tool. Media in the media library is uploaded to the site once, and then preserves alternative text and title so that it is reusable across the site.
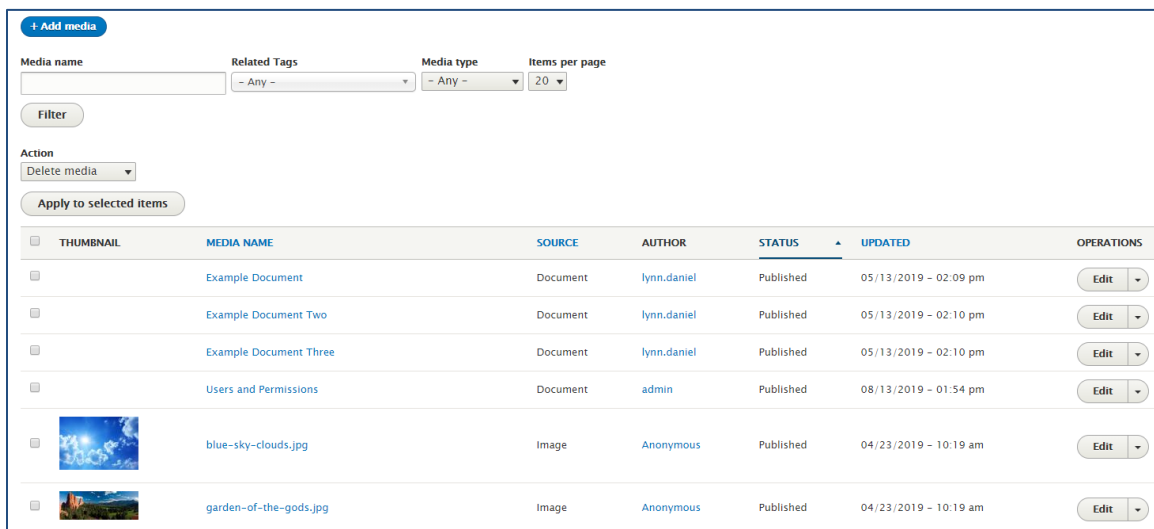


Within the media library, users can sort the media by name, source, author, status, or when it was last updated. Users can also search for particular items

using the search settings of media name, related tags, or media type. Media can also be added to the site by using the blue *Add Media* button.

To update a piece of media in this library, select the *Edit* button in the Operations column. From this view you can upload a new version, change the title, and change the alternative text. From this view you can also add or change a description of the media and add any desired tags.
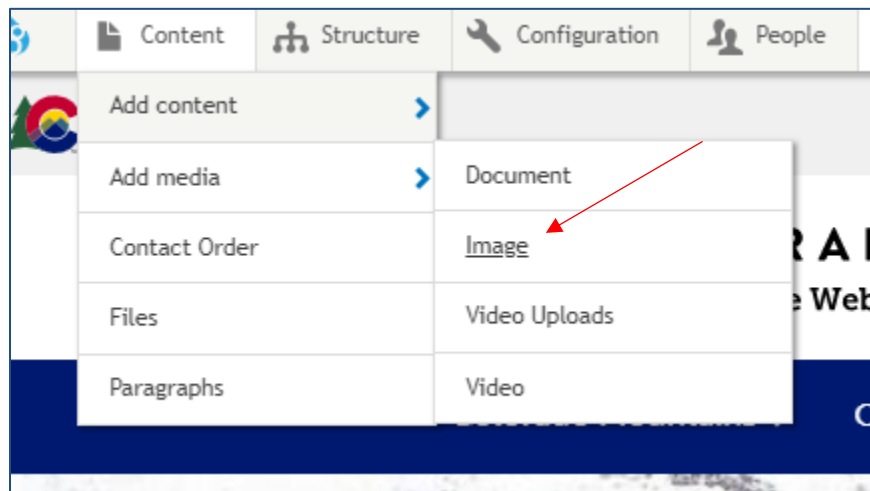


## 8.2. UPLOADING MEDIA

Media can be images, documents, or videos. In this section we will walk through adding images, adding files, and adding documents.

### 8.2.1. Uploading Images

1. Navigate to *Content > Add Media > Image*.



2. Add a name for your image and choose the file from either your computer or the IMCE file manager.
3. Add alternative text describing your image.
4. Add any tags and a description if desired.

5. Select *Save* at the bottom of the page.

**8.2.2. Uploading Documents**

1. Navigate to *Content > Add Media > Document*.
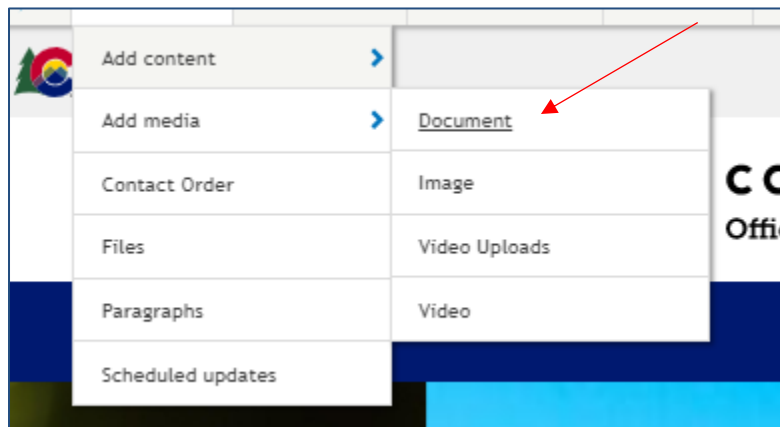


2. Add a name for your file and select the file from your computer.
3. Add tags as desired.
4. Select *Save* at the bottom of the page.

## 8.3. MEDIA AND FILES – WHAT IS THE DIFFERENCE?

Media and Files are two different groupings of information that you can see when in the administration view in the Content section. The Content Library

and the Media library are your two all-encompassing libraries, but there are some other options too. The Files library is primarily a subset of the Media Library. Files can appear on your site in a few ways. Below are some facts about the Files Tab and the Documents in your Media Library.

- If you migrated your site from Pacific to D8, you will have files that were originally uploaded to pages in Pacific in you D8 Files library, but they will not appear in you Media library.
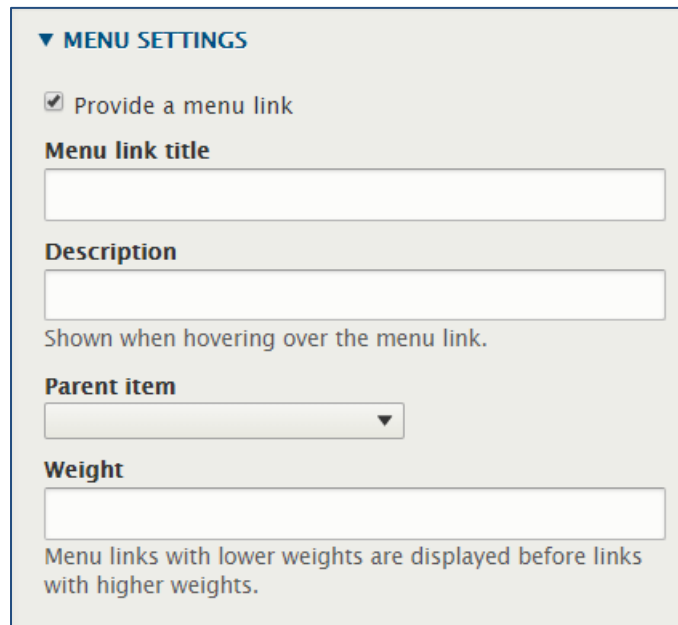    a. This is the one exception of the Files Library being a subset of the Media Library.
    b. These files will not be removed by the system when they are not used on the site.
- Any file you want to upload to the site you will add as a document, and it will appear as a Document Object in the Media library and a File in the files tab.
- The name of the files as listed in the Files tab will be what you use to link to the file using the link-it tool on the site.
- To remove a file completely from the site, delete the media object (Document in the Media Library) and then the file.
- Always try and upload new files – the D8 platform is not a file management system, if you want more robust file management, we recommend using a file management system such as Google Drive.
- Any File, uploaded to the system and not migrated in by a script during a migration, will be wiped off the site if it does not appear on the site in at least one place. The one place counts as in the Media Library in the Document Object. This is why when you open the Document Object you are not immediately taken to the file itself.

Ensure that when you upload a file to your site you upload it as a Document and it appears in your Media Library.

## 9. Adding a Page to a Menu

### 9.1. HOW TO ADD A PAGE TO A MENU

1. When editing a page, on the far right, there is a separate box with Publishing information in it. Open the *Menu Settings* accordion section within this box and select the *Provide a menu link* checkbox. The following menu will appear.



2. Provide a menu link title. If this field is not changed, the menu link title will default to the page name.
3. Select a parent item to indicate under which menu item the new page should appear. If no parent page is selected, the page will be added as a top-level item within the navigation menu.
   a. To ensure the page is added to the main Navigation, use the Parent Item *<Main Navigation>*
   b. The support admin can edit Individual Menus through *Manage > Structure > Menus* and then selected by selecting *Edit Menu*.

Note that when a page is added to a menu it defaults to alphabetical order. You can rearrange the menu by navigating to *structure > menus*, locating the menu, and rearranging it's order by using the drag and drop functionality within the menu links, and selecting save at the bottom of the page.
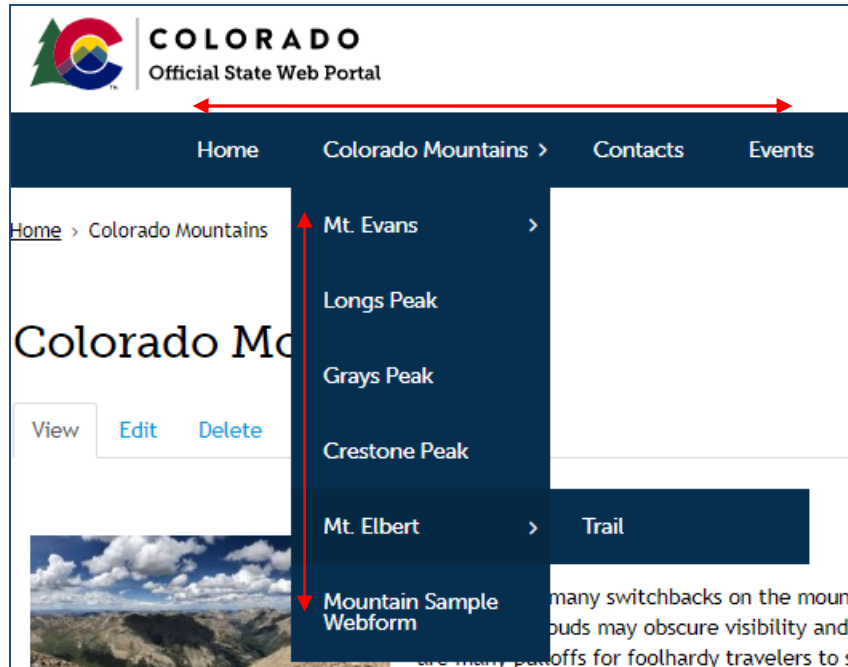
To add a page to multiple menus, use the *Manage > Structure > Menus > *Menu to add links to* > Edit Menu > Add Link* path. Note that by adding menu links in this way the URL of the link being added must be known.

### 9.1.1. Organizing Menu Links using drop and drag functionality

To reorder parent links choose the drop and drag icon ✛ next to the name of the element from the list of available content and move the pointer over the element.  Then, select the element and move the element, up or down, to the desired location on the list, then select save



To create a child link drag and drop choose the drop and drag icon ✛ next to the name of the element from the list of available content and move the pointer

over the element.  Then, select the element and move the element left or right to nest content under selected menu links, then select save.



## 9.2. ADDING A LEFT OR RIGHT MENU TO A PAGE

The top navigation can be duplicated within a left or right menu on pages and webforms. This can be done by selecting a menu to display in the *Menu Reference* field. These fields can be found in the *Edit > Display* section of each piece of content. After a selection for the menu has been made, the page must be saved. Custom menus can be created in and edited in the *Manage > Structure > Menus* view.

## 10. Adding a Custom Link to a Menu

1. To add a page to multiple menus, use the *Manage > Structure > Menus > \*Menu to add links to\* > Edit Menu > Add Link* path. Note that by adding menu links in this way the URL of the link being added must be known.
2. Complete the required information in the *Add Link* screen.



3. Select *Save* at the bottom of the page.

The *Menus* view can be used to quickly reorder the menu links, enable breadcrumbs, and duplicate internal links.

Note that this method of adding custom links will also work for adding links to internal pages.

### 10.1. ADDING A BLANK LINK
To create a Blank Link or "Dummy Link" in your menu follow these steps.
1. As for Custom Menu Links, click *Add Menu Link* and fill out the *Menu Link Title* field.
2. In place of a link add #
3. Click *Save* at the bottom of the page.
4. Rearrange the menu to your desired layout.
5. Click *Save*.
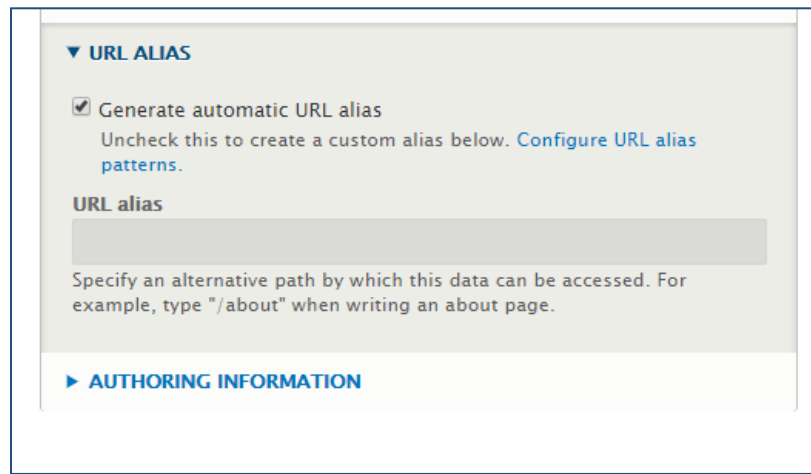
## 11. Creating Custom URL Aliases

Users can create custom URLs for pages. All URL aliases must be unique; if an attempt is made to create a custom URL that is already in use, an error message will be received.

1. Begin to edit the page that will have a custom URL. In the publishing information box on the far-right side, click the *URL Alias* accordion section.
2. Uncheck the *Generate automatic URL alias* box.
3. Enter the desired custom URL.
4. Select *Save* at the bottom of the page.



If no custom URL alias is created, the URL will be automatically generated based on the page title. This means that changing the page title will change the URL unless the *Generate automatic URL alias* box is unchecked.

Note that when the link-it tool is used, if a URL is changed using this process, the link created with the link-it tool will be preserved and you will not have to do any additional updating to that link.

## 12. Creating Custom URL Redirects

Users can create custom URLs redirects for pages within their site as well as from pages on their site to external sites. All URL redirects must be unique; if an attempt is made to create a custom URL redirect that is already in use, an error message will be received. Additionally, if a redirect is being created where an URL Alias should be, a message will also appear.

1. Navigate to the URL redirects section by following the path *Configuration > Search and Metadata > URL Redirects*.
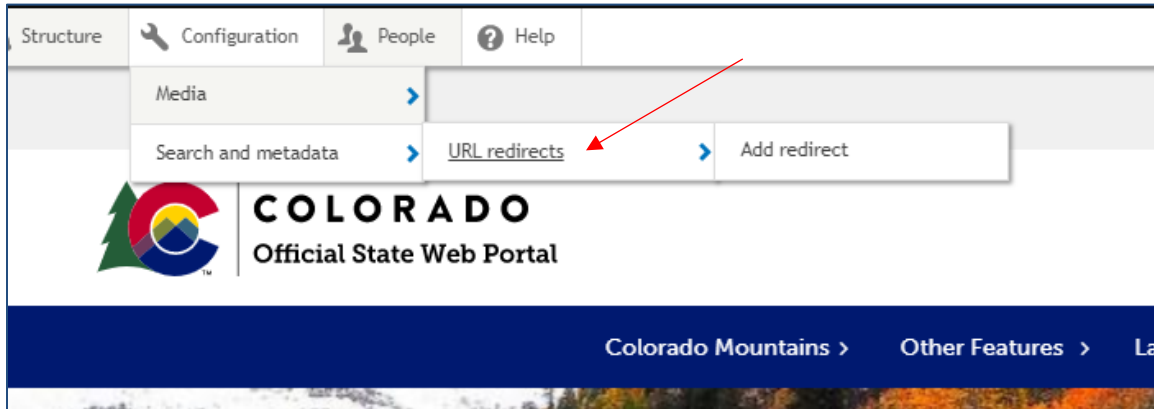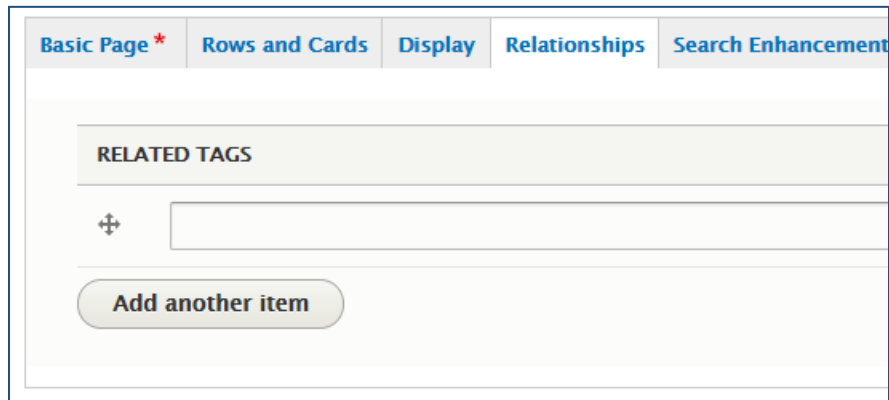


2. Click *Add Redirect*
3. Add the path of a page from your site in the first field (the url redirected from).
4. Add either a relative path link to your site or an external site that will be redirected to in the second field (the url redirected to).
5. Set the Language to English.
6. Select *Save* at the bottom of the page.

# 13. Relationships and Tags

## 13.1. CREATING RELATIONSHIPS USING TAGS

1. Create a new page or edit an existing page.
2. Navigate to the *Relationships* tab.



3. Write in the tag that you want to associate with this page, select *enter* on the keyboard.
4. If more tags need to be associated, add them using the *Add another item* button.
5. Once created, a tag can be removed from a page from this same tab.
6. Select *Save* at the bottom of the page.

## 13.2. DISPLAYING RELATED CONTENT ON A PAGE

There is an option to show previews of related content on a page. This option can be found in the *Display* tab when editing a page. Note that related objects will only appear if tags have already been added to all pages or content in question.

## 14. Adding Links to Content

### 14.1. LINKING TO OTHER PAGES

Add links to content text using the steps below. This process is the same for any content types that use a WYSIWYG to build the body section.

1. Within the WYSIWYG area in the edit screen, highlight the text to be turned into a link and select the link button from the WYSIWYG toolbar. (Add links to images using Media Cards).
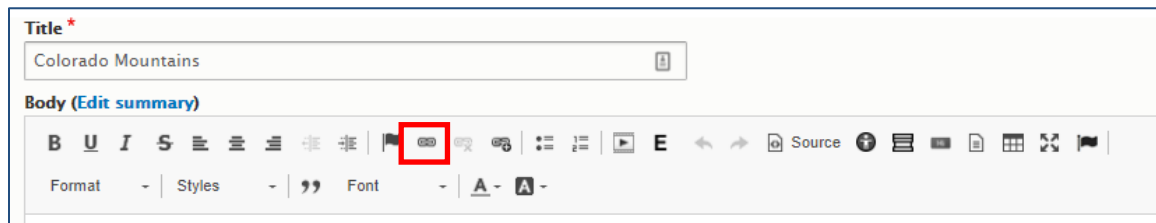


If you are adding a link to content within the site, use the *Link – It* link option. The *Link-It* feature as a dropdown list of linkable content on the site that appears, and content is typed. See section below for more information on Link-it.
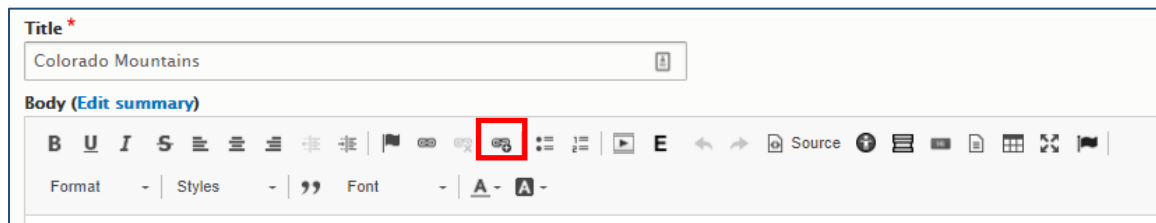


2. Add the destination URL to the URL field within the *Link* dialog box. It is best to copy/paste the URL to ensure it is accurate. If the *Protocol* does not self-adjust, change the *Protocol* dropdown to the correct setting.

3. Select the window that you want the link to populate by adjusting settings in the *Target* tab. It is recommended to set the window to self.
4. Select *OK*.
5. Check that the link appears (it should now be underlined).
6. Select *Save* at the bottom of the page.

**Note:** We recommend using relative path links when creating links to internal pages.
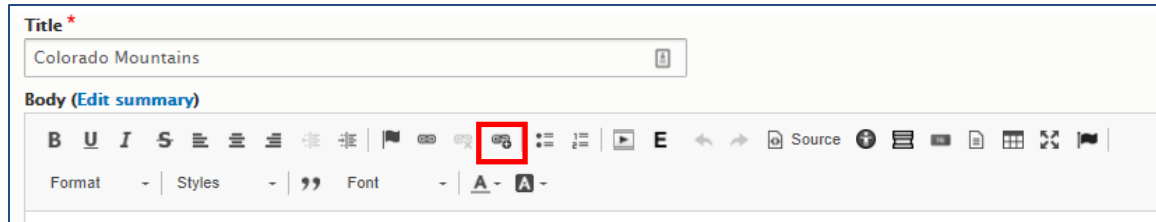
## 14.2. LINK-IT
Link-it is a tool that helps create relative path links within a single site. Content that is published within the site is indexed, and the link-it tool uses the list of content to allow for quick linking options. Note that the link it tool will only use a relative path link if the content is selected through the drop down. If a url is pasted into the link-it field, it will not change (if the url was a relative link when pasted in, it will remain a relative path link; if the url was an absolute path link, it will remain an absolute path link).

Follow these steps to use the Link-it tool:
1. Within the WYSIWYG area in the edit screen, highlight the text to be turned into a link and select the link button from the WYSIWYG toolbar.
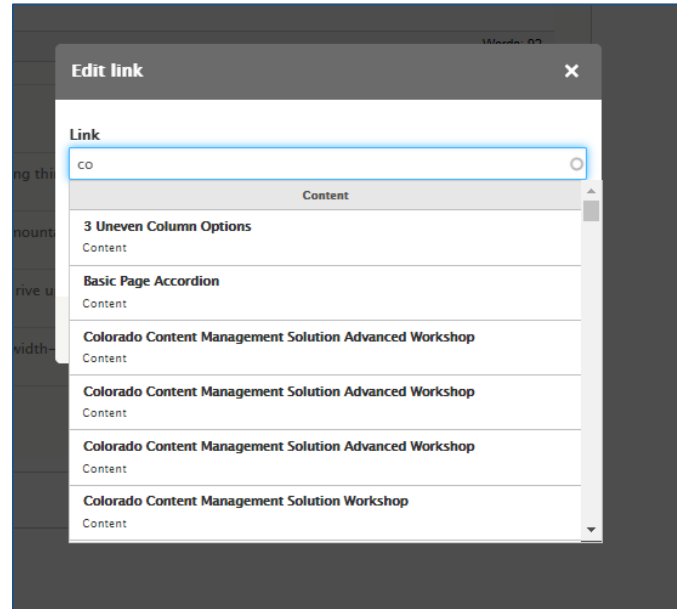
**Title** *

Colorado Mountains

**Body (Edit summary)**

B  U  I  S  ≡  ≡  ≡  ⊣≣  ⊢≣  |  ⚑  ⊂⊃  ⊂⊃  ⊂⊃  |  ⋮☰  ⋮☰  |  ▶  E  ↩  ↪  |  Source  ⊕  ☰  ▭  ▯  ⊞  ⛶  ⚑  |

Format    ▾  |  Styles    ▾  |  99  Font    ▾  |  A▾  A▾
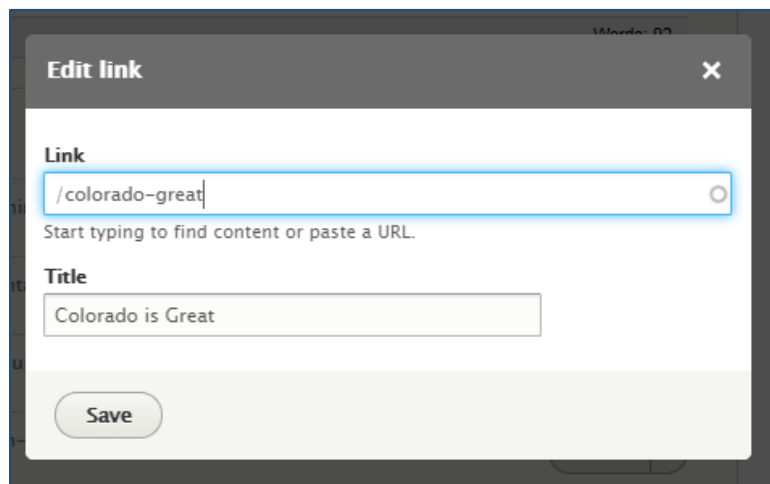
2. A text box will open, start typing the name of the page, file, or image that you are linking to (all must exist in the site).

**Edit link**                                          ✕

**Link**

co                                                      ◯

| Content |
|---|
| **3 Uneven Column Options**<br>Content |
| **Basic Page Accordion**<br>Content |
| **Colorado Content Management Solution Advanced Workshop**<br>Content |
| **Colorado Content Management Solution Advanced Workshop**<br>Content |
| **Colorado Content Management Solution Advanced Workshop**<br>Content |
| **Colorado Content Management Solution Workshop**<br>Content |

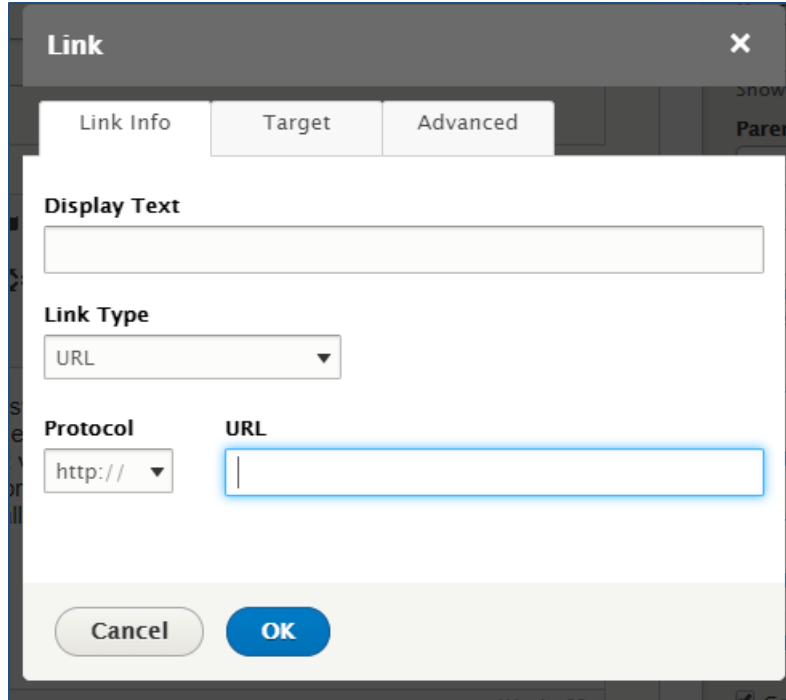3. Scroll through the list of content (filtered by type: Content, File, etc.) to find the content you would like to link to, and then click the piece of content.
4. You will see the relative path link appear in the box.

**Edit link**                                          ✕

**Link**

/colorado-great                                         ◯

Start typing to find content or paste a URL.

**Title**

Colorado is Great

Save

5. The link has now been added to the page. Click *Save* at the bottom of the page.

## 14.3. LINKING TO ANCHOR TEXT

When you want to link to a piece of content on a page and not the entire page, you can do so by creating an anchor to that content (must be in a body section with WYSIWYG toolbar) and then linking to that anchor.

Note Anchor can be linked to from any link location by using the *#anchorname* where the *anchorname* is identical to the name used to create the anchor. This includes capitalizations, special characters, and spaces.

To create an anchor and anchor link, follow these steps:

1. Add the text or content you wish to add an *Anchor* too.
2. Set your cursor to the location where you would like to anchor too. Note that this will be the very top of the page, so we recommend setting your anchor a row about the content you want to appear when the anchor link is clicked.
3. Select the Flag icon in the WYSIWYG.
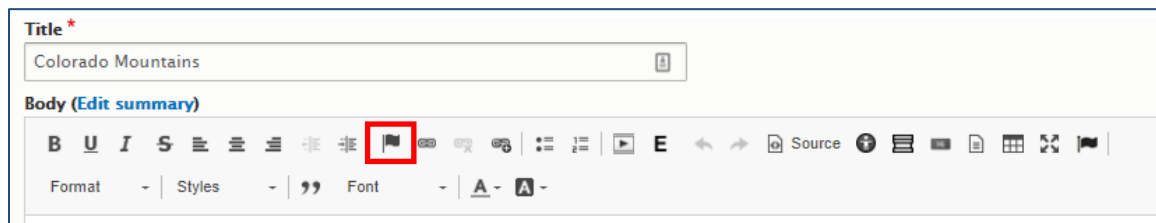


4. Name your Anchor Point.
   a. We recommend that you structure your anchor without spaces or capitalization. (ex: "anchor-1" would be recommended over "anchor 1")
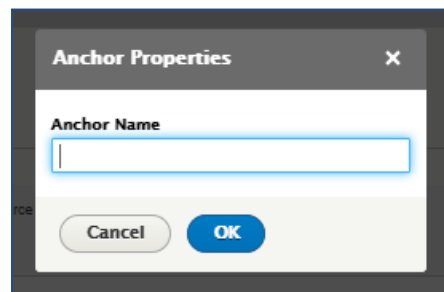


5. Click on the anchor or open the source code to view the name associated with the anchor point that we will use to create the url and make note of the exact name you used.
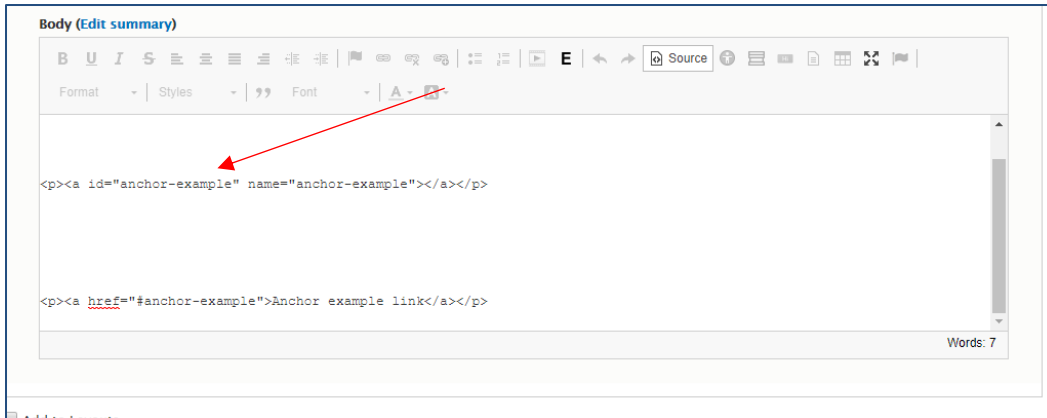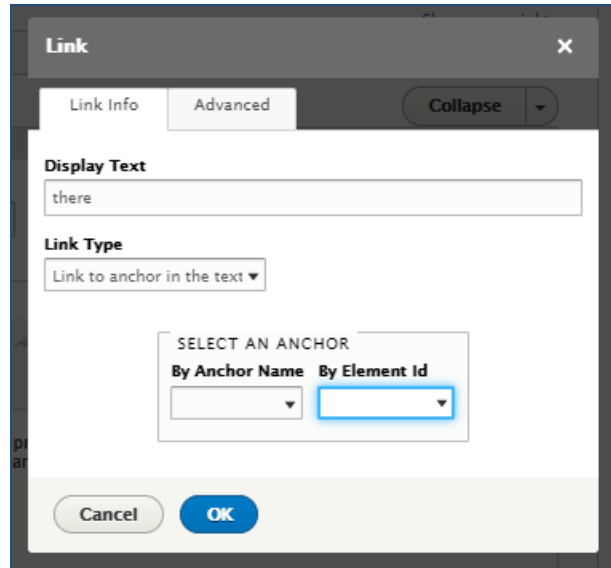
6. Navigate to the place that will jump to the Anchor Point.
7. If the location is within the same body section, select the link icon. If it is outside this body section, see step 11.
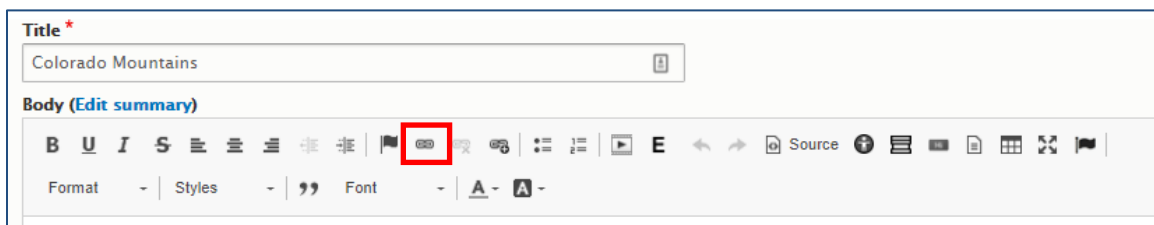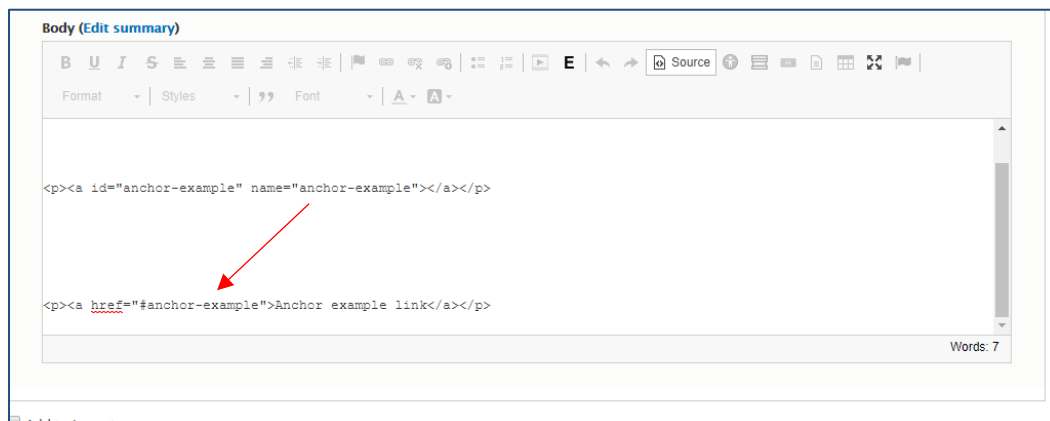


8. Change the link type to *Link to Anchor in the Text*.
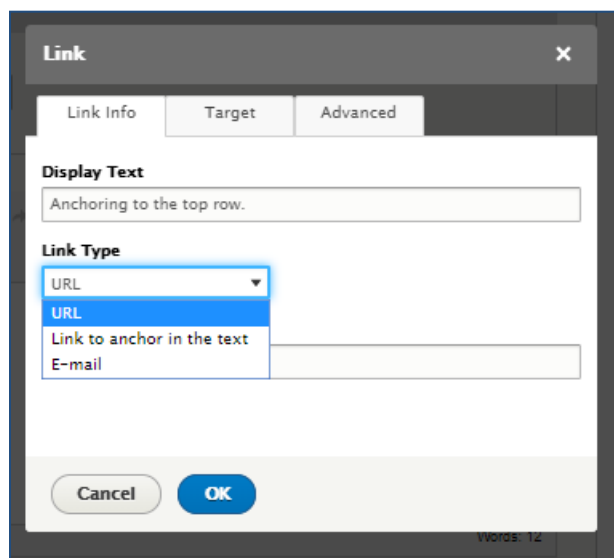


9. Select the desired Anchor Point.

10. Select the blue *OK* button.
11. If you would like to add a link to an anchor point outside of the body field you are working in, create a test anchor link and copy the code #anchorname and add that to the end of the relative url on the page to create the link. Or manually generate the relative path link for your page in the following pattern of /pagename#anchorname with the page name being the page url and the anchor name being identical to the name of the anchor you created.



12. Click *Save* at the bottom of the page.

In the example above, the url for the relative path link with anchor would be: /testpage#anchor-example This link could be added into a custom link for a menu or to another link-it link on the site.

## 15. Adding an Image to a Page

Images help break up large areas of text with illustrations, photographs, and graphics that supplement the text within the page. Users can add images using the image buttons within the WYSIWYG toolbar, or with the Media Card (as mentioned above).

| Image Traits | WYSIWYG Toolbar | Media Card |
|---|---|---|
| Resize the Image in the Body Section | ✓ | |
| Select an initial Image Size | ✓ | ✓ |
| Use the same image throughout the site and only upload it once. | ✓ | |
| Link to an image | | ✓ |
| Use Media | ✓ | |
| Directly Modify Alternative Text | | ✓ |

### 15.1. ADDING IMAGES WITH THE WYSIWYG

Adding images with the WYSIWYG allows the user add a size selection as well as an alignment to the image. WYSIWYG images can be edited by selecting on them and resetting properties.

1. Select on the media icon in the WYSIWYG toolbar. In Drupal 8 media is considered an *Entity Asset* and the icon is the *E*.
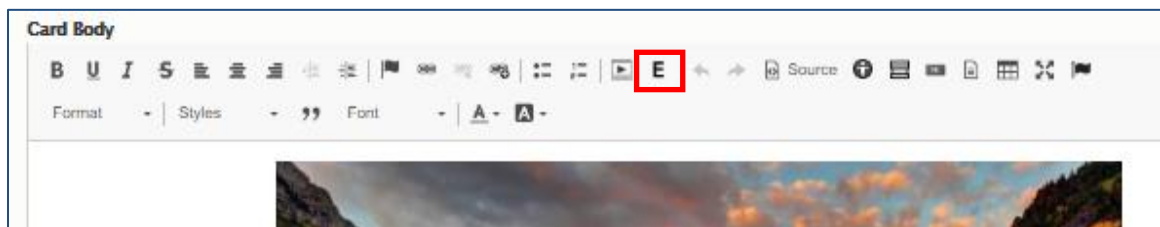


2. If the image has not yet been added to your image server, select the *Upload an Image* tab in the pop-up window. Otherwise, proceed to step 3.
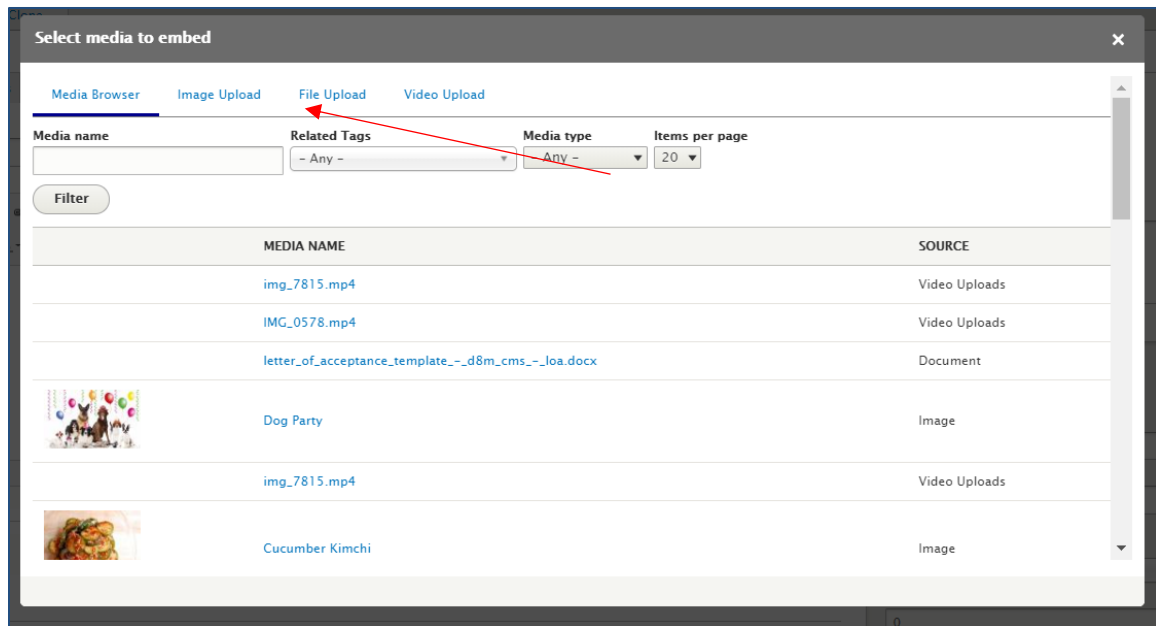
3. Select the image from the list in the *Media name* column. Then scroll to the very bottom of the window and select *Use selected*.
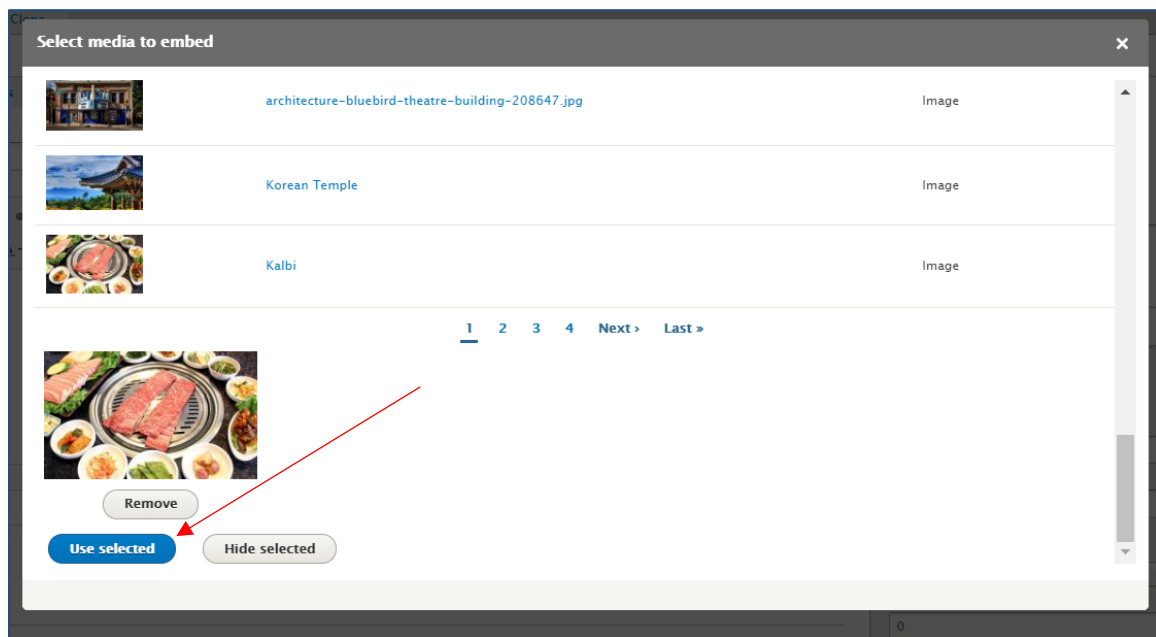


4. Select how you want the image to display using the *Display as* drop down.
   a. Display as *embedded* places the image as a default small size.
   b. Display as *thumbnail* allows for selection of various sizes from the Image style drop down.
   c. Aligning the image will allow text to wrap around it.
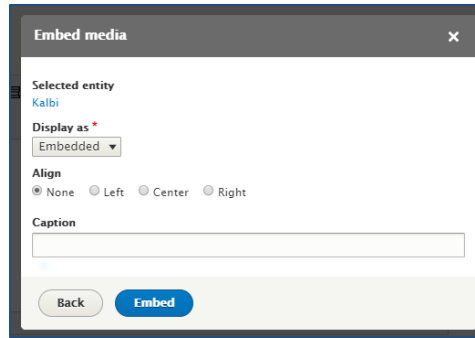
5. Select *Save* at the bottom of the page.
   a. To edit Media Entities, right select and select *Edit Entity*.

## 15.2. ADDING IMAGES WITH MEDIA CARDS

When adding an image to a page using a media card, there is more flexibility with the layout of the content. Media cards allow an image to be uploaded directly from the computer as well as from the media library. Additionally, because media cards do not have a resize option, ensure that the image that is uploaded to the card is the size and crop that is desired for that card – you can set the crop when you either upload the image into the media library, or when you upload it through the card. When an image is uploaded through the card it will be automatically placed in the media library for future use.

1. Navigate to the page you wish to add your media card to and select *Edit*.
2. Navigate to the Rows and Cards tab in the edit view.
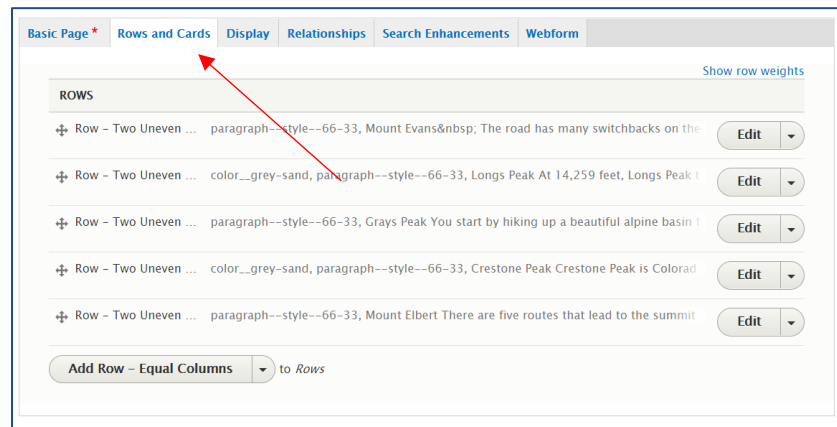


3. Select or create the row that you want the image to appear in and select *Edit* in that row.
4. Add a media card by selecting the small triangle on the right side of the *Add Card - Basic* button and select *Add Card – Media* from the drop-down list.
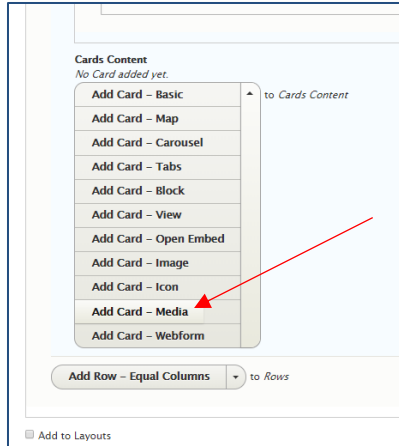
5. Add an image that you can select from the drop-down *Media Card Item*.
   a. If you are uploading an image, name it, assign alternative text, and set the crop, then scroll down and select *Select*.
   b. If you are using an image in the media library, select it and scroll down to the bottom of the media library window and select *Use selected*.
6. Add a link using the link field if desired.
7. Add a caption using the Media Caption section if desired as well.



8. Select *Save* at the bottom of the page.

## 16. Adding a File to a Page

Often external files need to be added to a page so that anonymous users may access a downloadable form, a flyer, or another kind of document. When you upload any file as a document so that it is searchable in the media library. You will also be able to see it in the file library.

Note: If you are a partner migrating from an existing Drupal 7 Colorado.gov site, you will see migrated files in the file library that are not in the media library. We recommend you reupload these files using the Add Document option so that they are searchable in the media library as well.

First, add the file to your site media library,

1. Follow the path *Content > Add Media > Document*
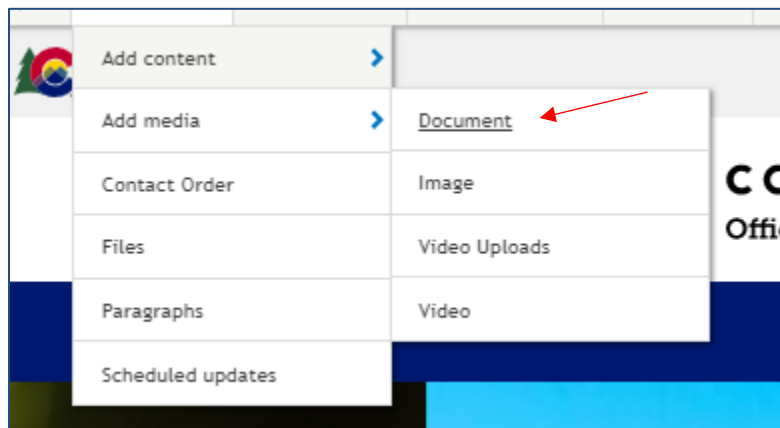


2. Add your file and take note of the name as links using the link it tool will be created from this.



You can find this file in the file library by navigating to *Content* and then the *Files* tab and using the search bar to find the file by file name. Additionally, you may locate this file in the media library.

Next, to add the file to a page, follow these steps:

1. Navigate to the page you want to add the file too.
2. Create or select some text that will be the anchor text for the file link.
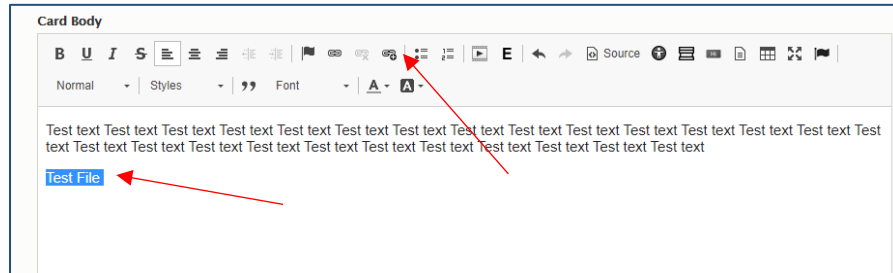


3. Select the Link-It icon in the toolbar (small link with plus sign).
4. Begin typing the name you gave the file, and when you see the file in the media section of the link it options, select it.
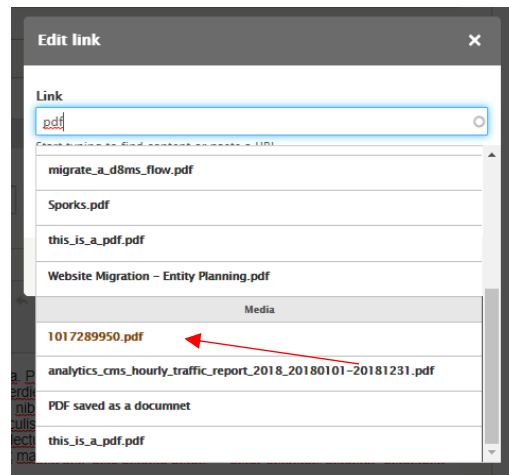


5. Select *Save* in the pop-up.
6. Select *Save* at the bottom of the page.

## 16.1. ADDING A FILE ICON

When adding a file, it appears as a link. If you wish to call out the file as a file with an icon, you can do so by using a button with an icon in it.

1. Add some space in front of your link text that links to the file
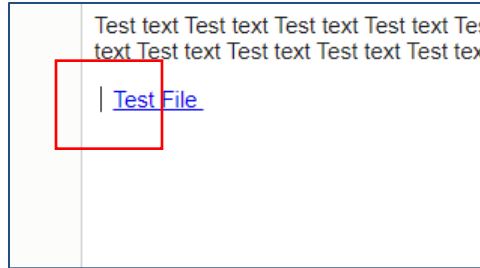
2.  While your cursor is in the middle of this space select the button icon
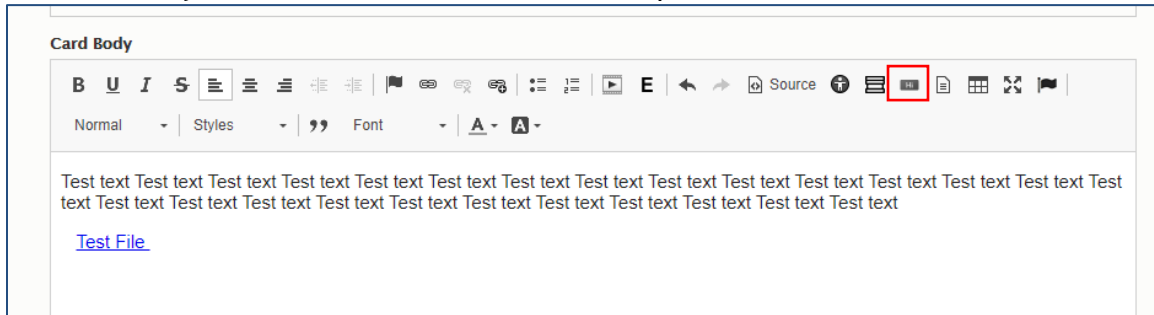


3.  A pop up will appear. Change the settings to the following:
    a.  Style = Link
    b.  Size = Normal (default)
    c.  Text = Empty
    d.  Url = Empty
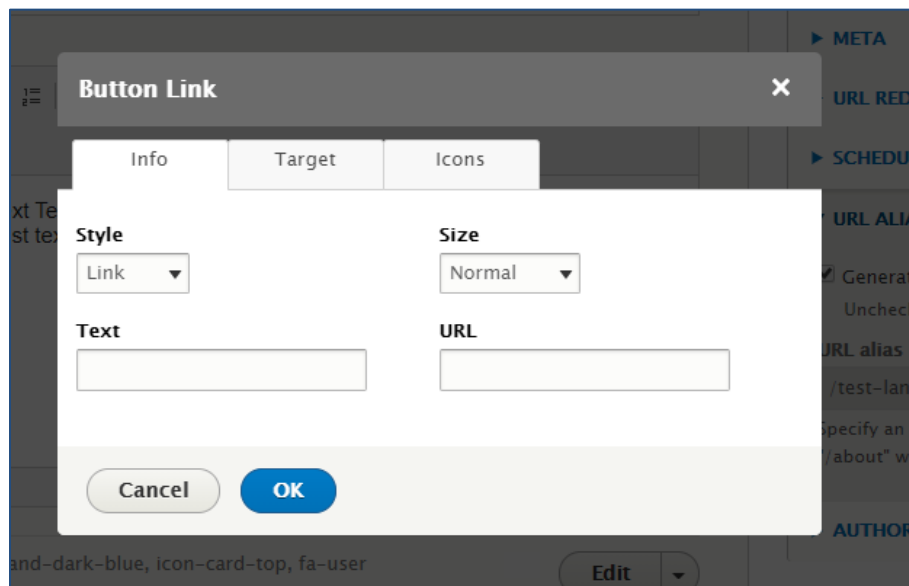


4.  Select the icon tab

5.  In the top right box labeled Left Icon, add the code for your file type – if you do not know the code for your Font Awesome icon you can select the text "Font Awesome List of icons" and you will be brought to a library of Font Awesome icons – you just have to add a "fa-" to the front of the code before adding it to the box on your site.
    a.  PDF file: fa-file-pdf
    b.  Word: fa-file-word
    c.  Excel: fa-file-excel
    d.  For a list of other files: https://fontawesome.com/icons?d=gallery&q=file

6.  Then select OK to add your changes. For buttons we are currently not able to edit them without creating a new button.
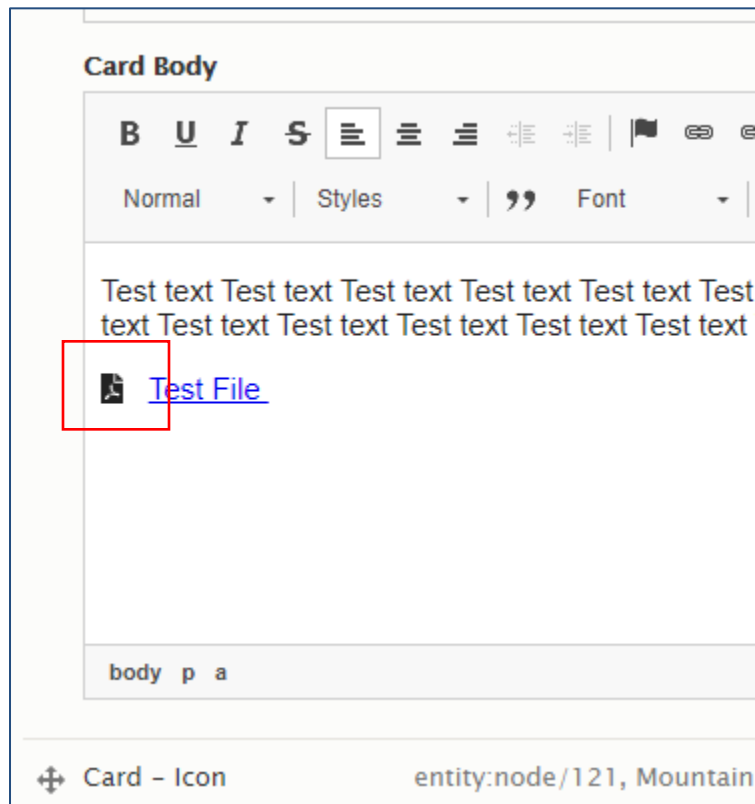


a.  If the file icon is too small, when creating the button use the Large option for the Size rather than the default Normal option.

7.  Save the page to have your file link and icon
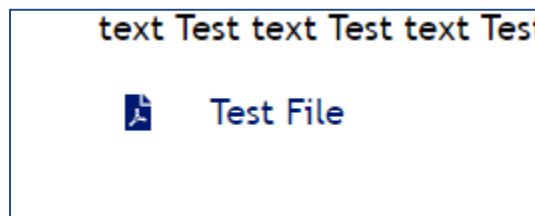
## 17. Editing Existing Content

All content types can be edited from the content view. Pages and certain homepage items can be edited by navigating to the content within the site. If content was created using rows and cards, the content will compress to minimize the amount of scrolling through content and the user only has to open the rows and cards that are being edited.

### 17.1. EDITING CONTENT FROM THE CONTENT VIEW

1. Follow the path *Manage > Content* to access the *Content* view.
2. Locate the page to edit content on and select the corresponding *Edit* link from the *Operations* column. The active User can browse or search to locate the node.

| | TITLE | CONTENT TYPE | AUTHOR | STATUS | UPDATED ▼ | OPERATIONS | PROMOTED |
|---|---|---|---|---|---|---|---|
| ☐ | Echo Lake | Basic page | | Published | 04/26/2019 – 05:02 pm | Edit ▾ | No |
| ☐ | Best Fourteeners for Beginners | Basic page | Anonymous (not verified) | Published | 04/26/2019 – 03:28 pm | Edit ▾ | No |
| ☐ | The Skies are Blue | Jumbo Slides | Anonymous (not verified) | Published | 04/26/2019 – 03:28 pm | Edit ▾ | |
| ☐ | Business Woman | Contact | Anonymous (not verified) | Published | 04/26/2019 – 03:28 pm | Edit ▾ | |

3. Select into each Row and Card to edit the page as desired and select *Save* at the bottom of the page.

### 17.2. EDITING PAGES WITHIN THE WEBSITE VIEW

1. Navigate to the page to edit.
2. Select the *Edit* tab in the page menu.
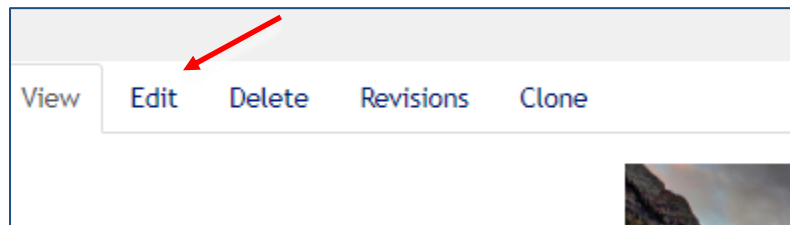
| View | Edit | Delete | Revisions | Clone |
|---|---|---|---|---|

3. Select into each Row and Card to edit the page as desired and select *Save* at the bottom of the page.

# 18. Publishing/Unpublishing, Cloning & Deleting Content

The *Create/Edit* views have several button options at the bottom of the page: Published, Draft, Archived, Save, Preview, and Delete.

> *Saving* content will save all changes without changing whether the node is published or unpublished (i.e., published pages will remain published, unpublished pages will remain unpublished).

> The *preview* button shows a preview of the node.
> Publishing content saves changes and makes the node visible to anonymous users.

> *Unpublishing* content saves changes and hides content from anonymous users.

> *Deleting* content permanently removes the node and any revisions from the site.

> *Archiving* the content will archive articles and blog posts in the content view. They are no longer visible on the site and can be republished at any time.
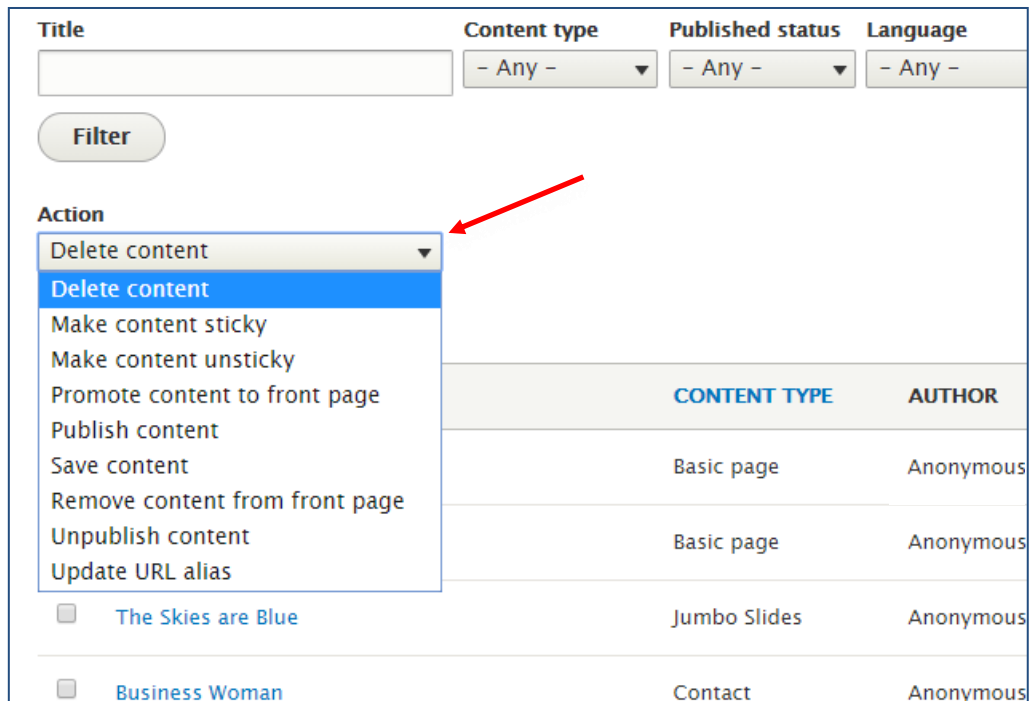
Additionally, a page can be cloned from either the pen icon on a landing page main page block, or from the page menu under the clone tab.

Mass actions (i.e. *Publish* or *Unpublish*) can be performed on multiple nodes at a time within the *Content* view.

Note: If you have saved content as published and then change the publishing settings to draft, your page will stay visible as a placeholder (appearing exactly how it was before you changed the status to draft) and a copy of it can be found and edited within the moderated content tab of the content library. Once you have edited the page to a where you want to publish again, change the draft status back to published, and the draft will replace the placeholder page on the live site.

## 18.1. PERFORMING MASS OPERATIONS

1. Navigate to the *Content* view.
2. Check the boxes in the left column the correlate with the content items you want to update.
3. Select the appropriate operation for the *Actions* dropdown menu.

4. Select *Apply to selected items*. A confirmation page will appear if the mass action was deleting content. There is no confirmation page for mass action publishing and unpublishing.
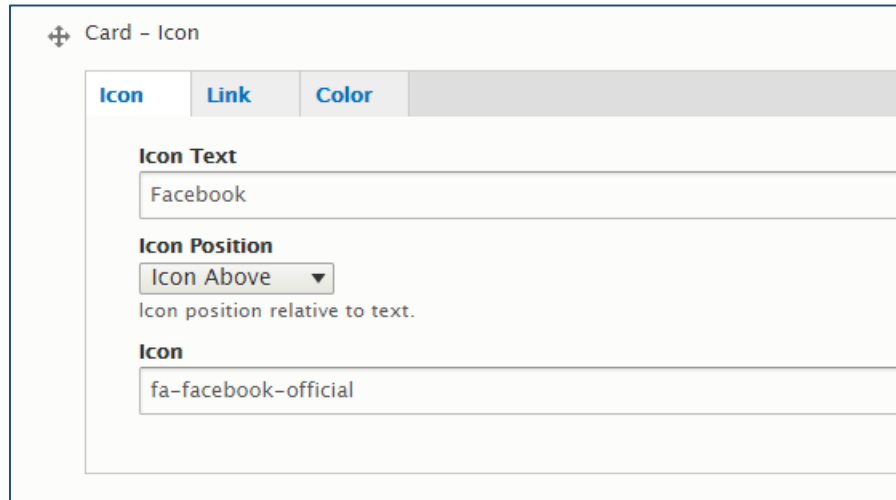
## 19. Adding Social Media Icons/Links

Social links increase referral traffic to an Entity's social media pages.

### 19.1. CREATING SOCIAL MEDIA ICONS IN CARDS
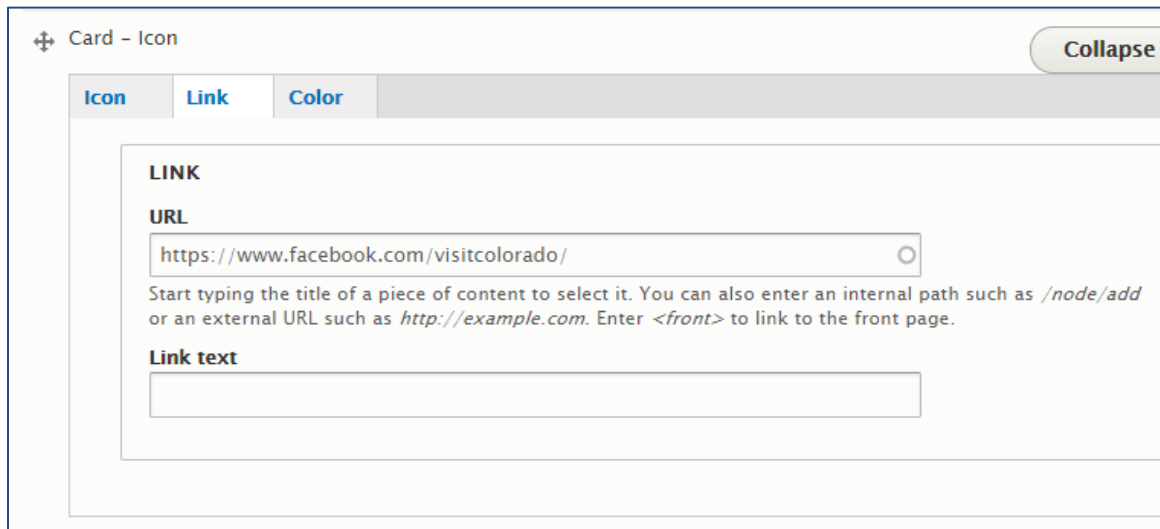
1. Go to *Content* in the admin menu and select the page and row that where the icons will appear.
2. Create the card *Add Card – Icon*.
3. Fill in any desired fields and select the Icon in the Icon field.



4. In the link tab add the social URL link.



5. Save or publish the node.

Repeat this process to add links to multiple social networks.

## 19.2. CREATING SOCIAL MEDIA ICONS WITH BLOCKS

Another way to implement social media icons is using the preset blocks that will appear in the footer. To use these blocks you will need to contact your Colorado Interactive Project Manager if you are in your project. If your project is live, please contact the service desk to use this.

Blocks that can be added:
- E-Mail
- YouTube
- Facebook
- LinkedIn
- Twitter
- Pintrest
- Instagram

To add a block please email the URL for your social media page to the appropriate contact (your assigned Colorado Interactive Project Manager or the Service Desk).

## 19.3. SHARETHIS INTEGRATION

Often the fastest way anonymous users move a site to social media is through sharing. ShareThis is a non-Colorado Interactive program that is linked through the platform to allow users to share content quickly. If you want to utilize the ShareThis integration, please let Colorado Interactive know so they can provision it to your account.

If you have not launched your site please email your CI project manager and if you have launched your site please email partnersupport@www.colorado.gov to contact our service desk.

### 19.3.1. Settings

Users can select specific social media channels, and button settings with the page corresponding to their inline or sticky feature choice in the Share buttons menu. Members are recommended to decide between inline and sticky icons and turn off the other option at this time. After the Entity Users adjust the settings as desired, the User selects Update, and the website should be updated within 5 minutes. Settings can be changed by the entity as often as desired.

## 20. Adding Blogs

There are three kinds of articles that can be used. The difference in how these articles is completely in the hands of the user. We recommend that each entity sets up standards for how each type will be used if multiple types are going to be used. The three kinds are *Blogs*, *Press Releases,* and *News Articles*.

A View Card with the Blog view must be placed on a page for blog entries to be accessible without the use of a link. All content user roles can create blog entries.

### 20.1. ADDING THE BLOG VIEW TO A PAGE

1. Select the *Edit* tab at the top of the page.
2. Select or create the Row the Blog list will be displayed in. Then add the card *Add Card – View*.
3. Change the view setting to *Recent Articles* and the Display Id to *Blog*.
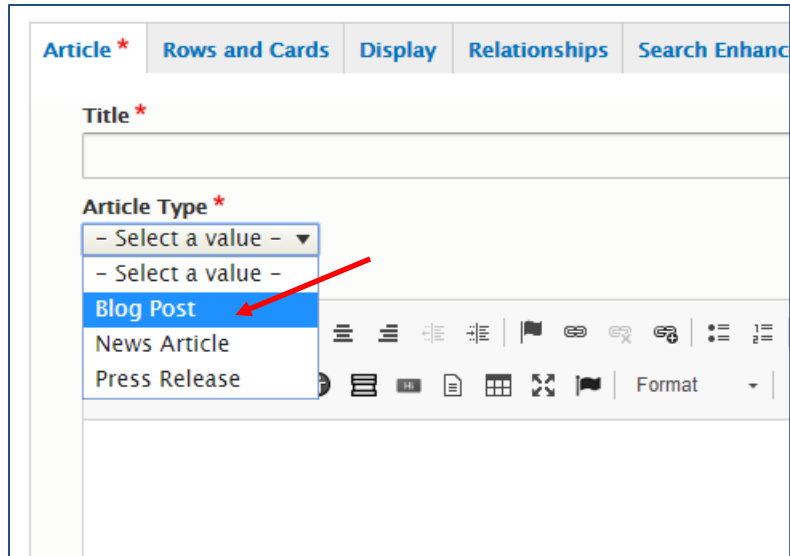


4. Select *Save* at the bottom of the page.
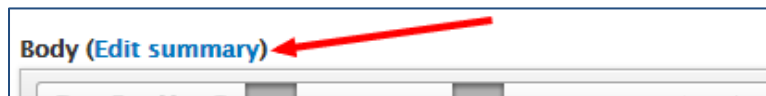
### 20.2. CREATING BLOG POSTS

1. Go to *Manage > Content > Add Content > Article* in the admin menu.
2. Title the blog entry.
3. Change the Article Type to *Blog Post*.

4. Populate the content of the blog entry in the WYSIWYG.
5. Save or publish the node.

**TIP:** Customize the homepage preview by selecting *Edit summary* and entering homepage preview text. Keep previews brief.

## 21. Adding News

There are three kinds of articles that can be used. The difference in how these articles is completely in the hands of the user. We recommend that each entity sets up standards for how each type will be used if multiple types are going to be used. The three kinds are *Blogs*, *Press Releases,* and *News Articles*.

A View Card with the Recent Articles view must be placed on a page for news entries to be accessible without the use of a link.

### 21.1. ADDING THE RECENT ARTICLES VIEW TO A PAGE

1. Select the *Edit* tab in the page menu at the top of the screen.
2. Select or create the Row the News list will be displayed in. Then add the card *Add Card – View*.
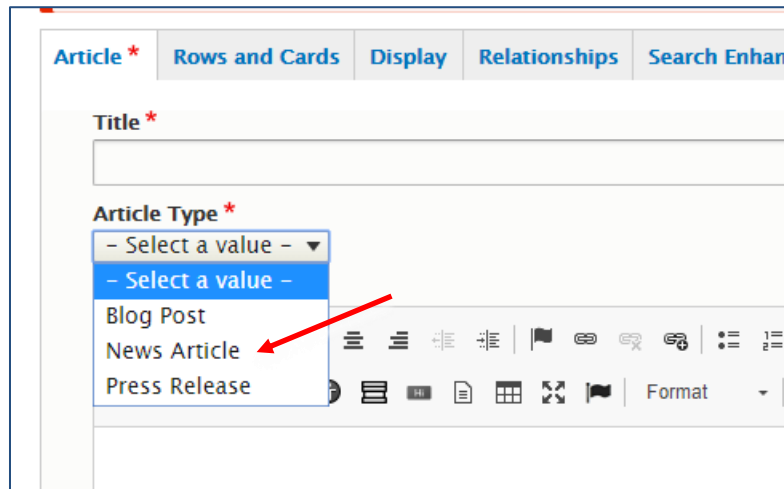


3. Change the View to be Recent Articles, and the Display Id to be News.
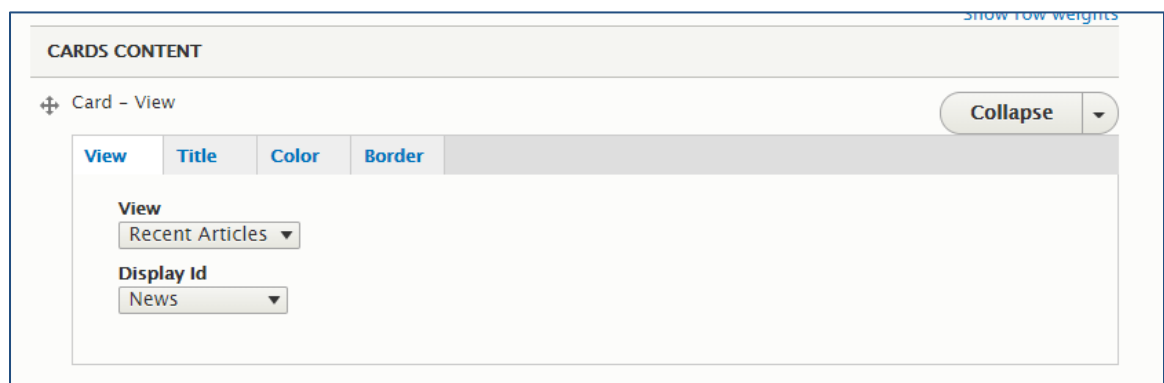


4. Select *Save* at the bottom of the page.

### 21.2. CREATING NEWS POSTS

1. Go to *Manage > Content > Add Content > Article* from the admin menu.
2. Title the news entry.
3. Select the Article Type as a *News Article*.



4. Populate the content of the news entry in the WYSIWYG.
5. Select *Save* at the bottom of the page.

**TIP:** Customize the homepage preview by selecting *Edit summary* and entering homepage preview text. Keep previews brief.

## 22. Adding Press Releases

There are three kinds of articles that can be used. The difference in how these articles is completely in the hands of the user. We recommend that each entity sets up standards for how each type will be used if multiple types are going to be used. The three kinds are *Blogs*, *Press Releases,* and *News Articles*.

### 22.1. ADDING THE PRESS RELEASE VIEW TO A PAGE

5. Select the *Edit* tab in the page menu at the top of the screen.
6. Select or create the Row the News list will be displayed in. Then add the card *Add Card – View*.
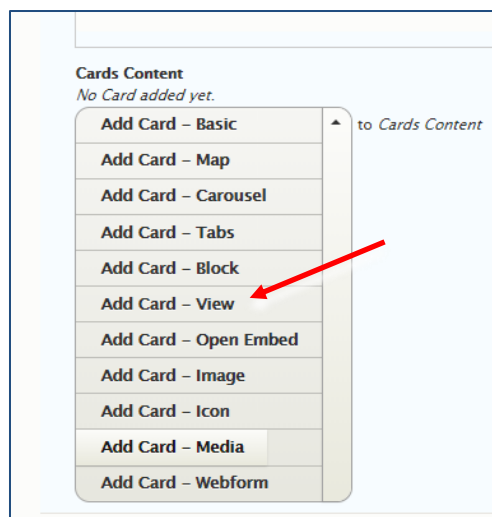
**Cards Content**
*No Card added yet.*

| | |
|---|---|
| Add Card – Basic | to *Cards Content* |
| Add Card – Map | |
| Add Card – Carousel | |
| Add Card – Tabs | |
| Add Card – Block | |
| Add Card – View | |
| Add Card – Open Embed | |
| Add Card – Image | |
| Add Card – Icon | |
| Add Card – Media | |
| Add Card – Webform | |

7. Change the View to be Recent Articles, and the Display Id to be News.

**CARDS CONTENT**

Card – View

Remove

| **View** | **Title** | **Color** | **Border** |
|---|---|---|---|

**View**
Recent Articles ▼

**Display Id**
Press Release ▼
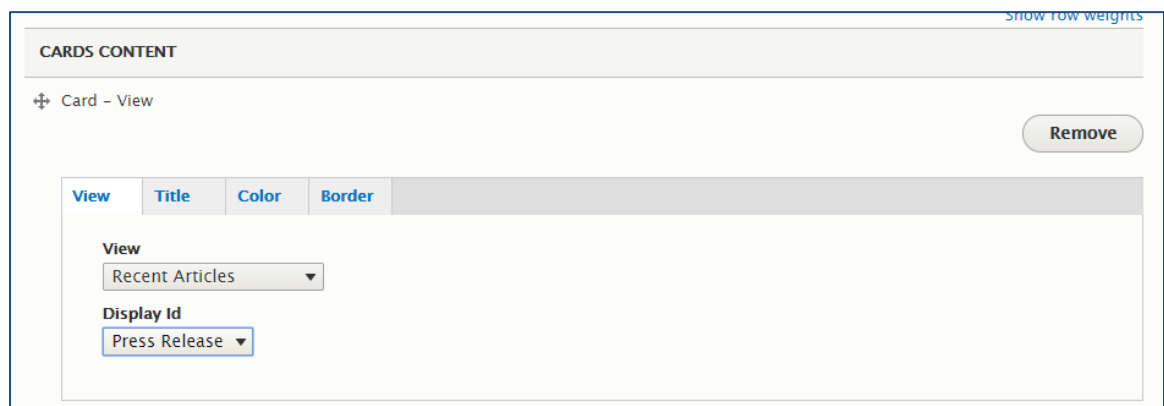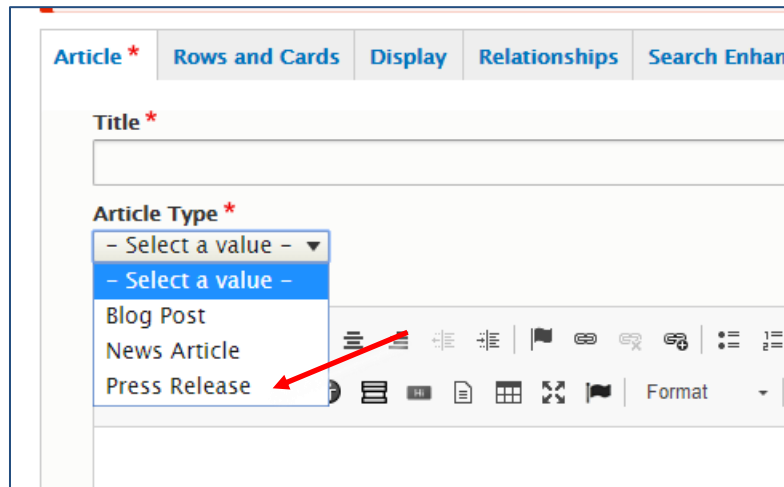
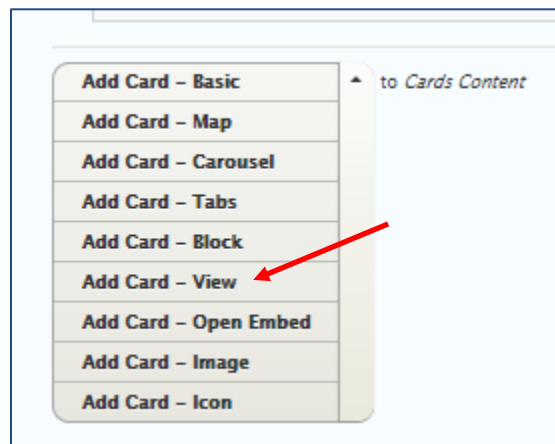8. Select *Save* at the bottom of the page.

### 22.2. CREATING PRESS RELEASES

6. Go to *Manage > Content > Add Content > Article* from the admin menu.
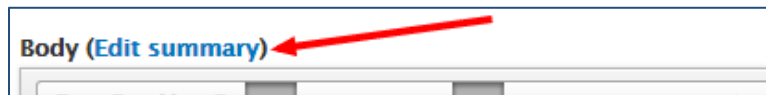
7.  Title the news entry.
8.  Select the Article Type as a *Press Release*.



9.  Populate the content of the news entry in the WYSIWYG.
10. Select *Save* at the bottom of the page.

**TIP:** Customize the homepage preview by selecting *Edit summary* and entering homepage preview text. Keep previews brief.

## 23. Adding the Mini Calendar

A View Card with the Mini Calendar view must be placed on the page for events to be accessible without the use of a link.

### 23.1. ADDING THE MINI CALENDAR VIEW TO A PAGE

1. Select the *Edit* tab in the page menu.
2. Select or create the Row the Mini Calendar will be displayed in. Then add the card *Add Card – View*.
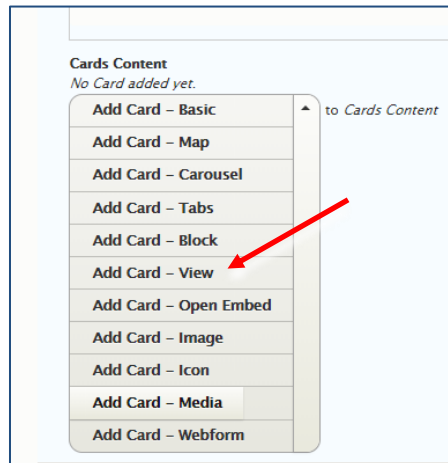


3. Change the View to *Mini Calendar* and the Display Id to *Block*.
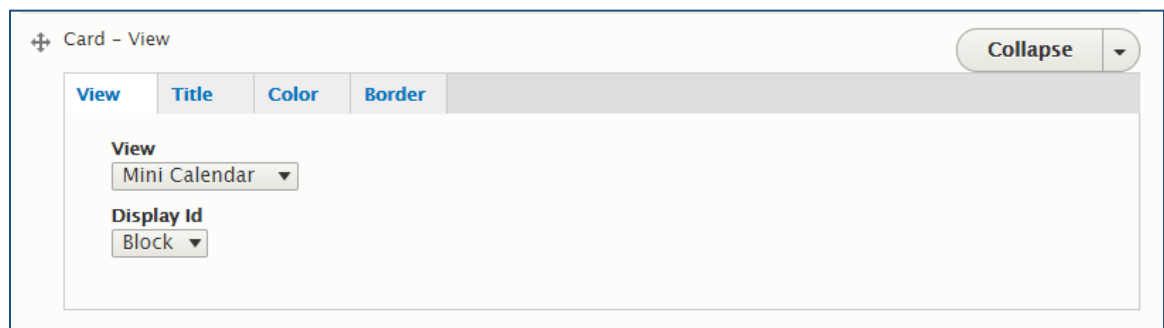


4. Select *Save* at the bottom of the page.

### 23.2. CREATING EVENTS

1. Go to *Manage > Content > Add Content > Event* in the admin menu.
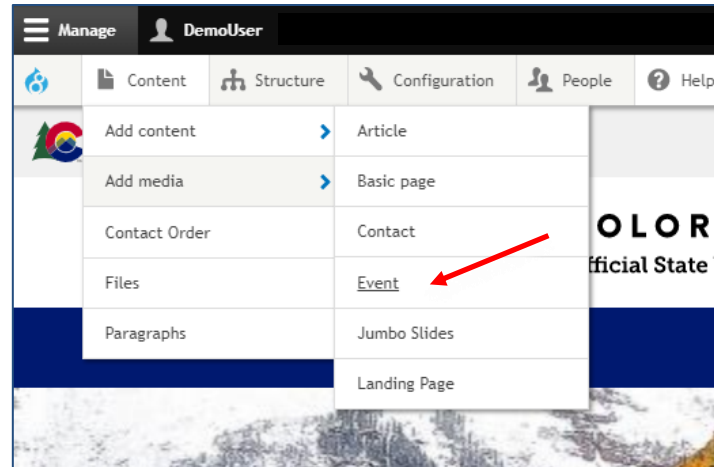
2. Title the event.
3. Select the appropriate date and time settings.
4. Populate event details in the WYSIWYG.



5. Select *Save* at the bottom of the page.
6. Verify that the event is on the calendar.

## 24. Adding Custom Blocks

Custom blocks are a content type that allow full customization of the title and body content; anything that the WYSIWYG allows can be placed in a custom block.

### 24.1. ADDING A CUSTOM BLOCK TO A PAGE

1. Select the *Edit* tab at the top of the screen.
2. Select or Add the row that you want the block on. Add a Card to the Row using *Add Card – Block* from the drop down.
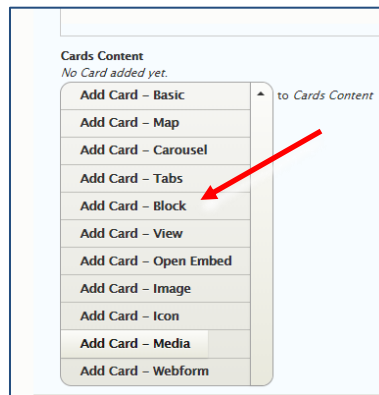


3. Select the desired custom block from the drop-down titled *Card Custom Block*.
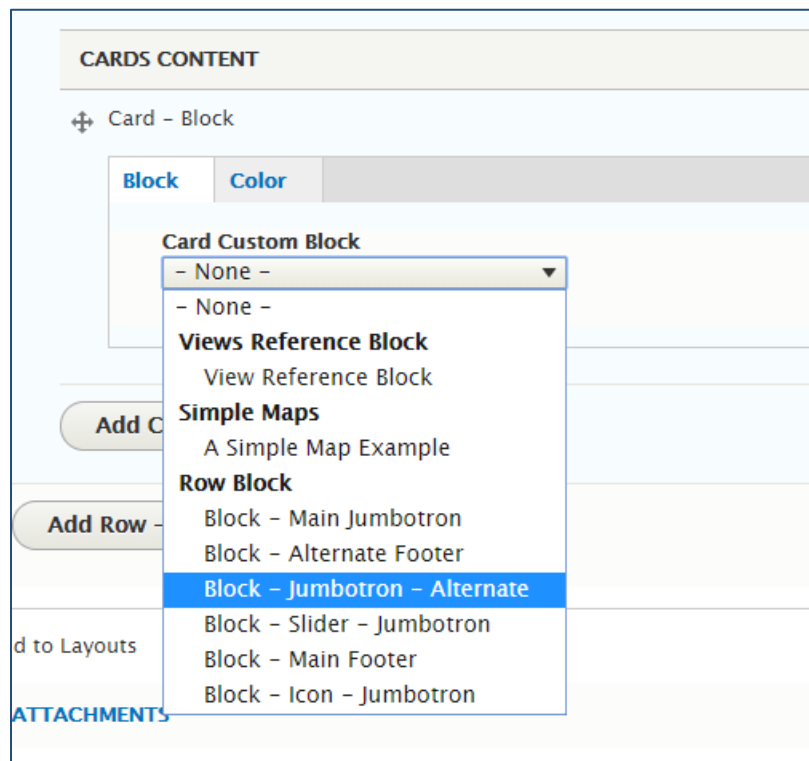
4. Add content into the block.
5. Select *Save* at the bottom of the page.

## 24.2. CREATING BLOCKS

1. Go to *Manage > Structure > Block Layout > Custom Block Library > Add Custom Block* in the admin menu.
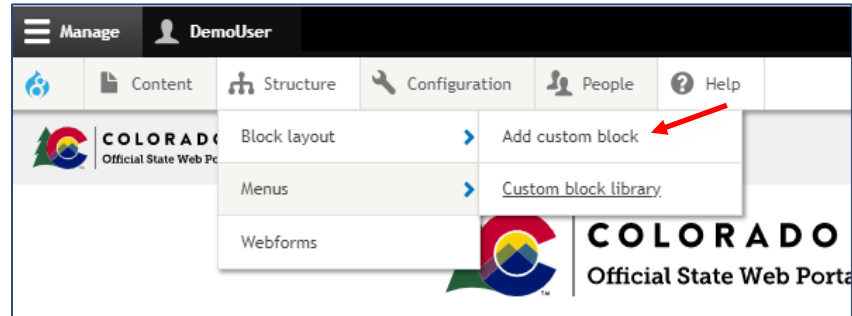


2. Select the type of block: Row, Block
   a. Row: A block that can take up an entire row and uses rows and cards.
      i. Contains: Block Description, any added rows and cards with content.
   b. Block: A block that takes up the space of a card.
      i. Contains: Block Description and body.
3. Describe the block in the *Block description* box.
4. Populate the content of the block in the WYSIWYG or using Rows and Cards depending on the block choice.
5. Select *Save* at the bottom of the page.

Repeat this process to create multiple custom blocks.

# 25. Using Webforms

**Please note that webforms should not be used to collect personally identifiable information (PII).** PII as defined by NIST is considered "any representation of information that that permits the identity of an individual to whom the information applies to be reasonably inferred by either direct or indirect means." For more information on PII please visit:
https://csrc.nist.gov/glossary/term/personally-identifiable-information
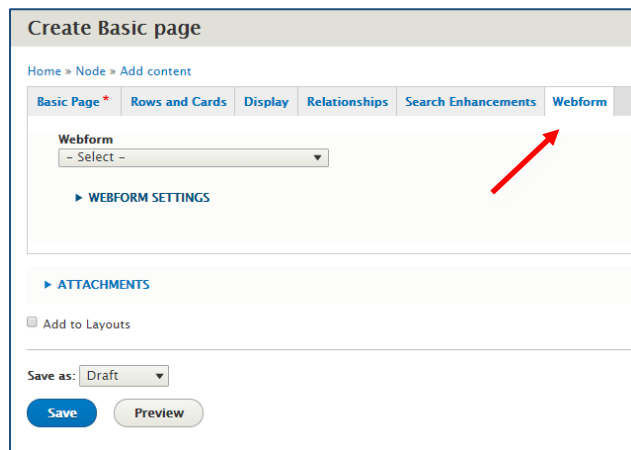
## 25.1. ADDING A WEBFORM TO YOUR SITE

There are two ways to add a webform to your site. One is with the webform tab on a basic page, and the other is by using the webform card in a rows and cards layout.

To add a webform using a webform card, add the card and then select the webform from the drop-down list of options.

To add a webform using the webform tab, follow these steps:
1. Go to *Content > Add Content > Basic Page* in the admin menu.
2. Navigate to the Webform tab in the edit menu.



3. Select the desired webform from the drop-down list.
4. Edit the remainder of the page.
5. Select *Save*.

Note that when you add a webform using the webform tab it will appear at the bottom of the basic page.

## 25.2. CREATING AND EDITING A WEBFORM

1. Follow the path *Manage > Structure > Webforms*.
2. If you are creating a webform, select add webform, if not skip to step 3.
   a. Title the webform, add an optional administrative description and select *Save*.
   b. You will be taken to the list of all webforms.

3.  Locate the webform and select *Build* in the operations column.



4.  Add fields by selecting *Add element, Add page,* or *Add layout*.
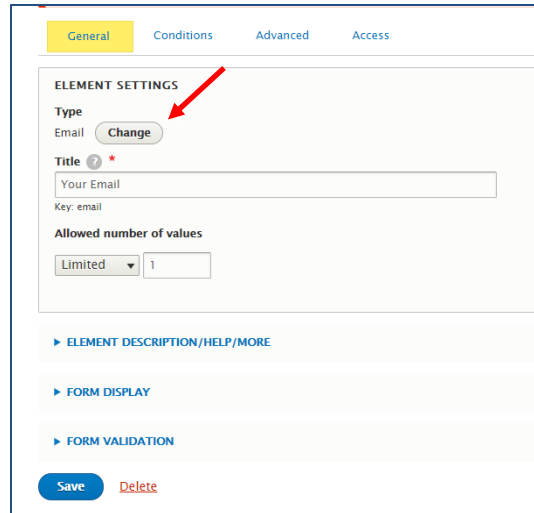


5.  Add more elements, pages, and layouts until satisfied.
    a.  Add elements by clicking *Add Element* and then select an element from the list. If you are unsure of what an element does, hover over the element and a pop-up will appear with a short description.
    b.  Add Layouts to your webform by clicking *Add Layout* and then selecting a kind of layout. Once you have selected the layout, it will populate to the bottom of your webform. Drag and drop elements into your layout to create space saving webforms.
6.  Edit elements by selecting them and saving changes within them.
    a.  Note if you want to change one element to another, edit the element and click the *Change* button next to the element type.

7. Move content within the webform by selecting and dragging the fields with the plus sign in the title column.
8. Select *Save Elements* at the bottom of the page.
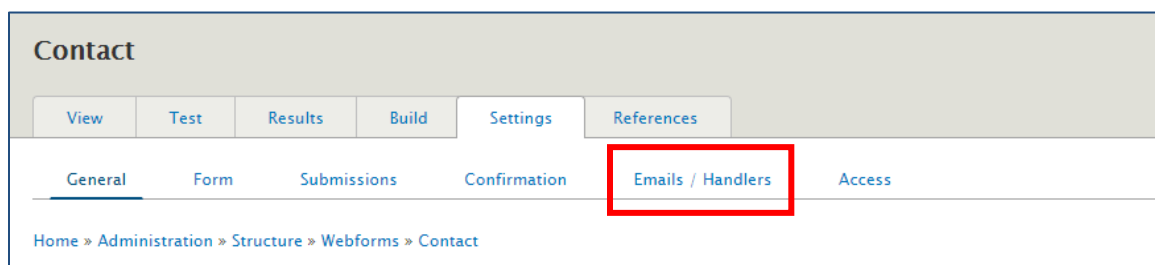
Note: It is recommended to save elements often to ensure no loss of work.

## 25.3. ADDING EMAIL RECIPIENTS TO FORM SUBMISSIONS
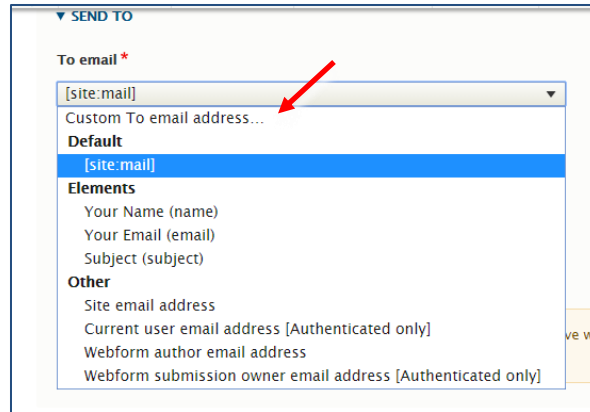
Webforms can be set up to send submission information to entity employees, allowing a team to receive prompt notifications of submissions. This process also allows for confirmation emails to be sent to the individual who submitted the webform if *E-mail* was included as one of the form fields.

### 25.3.1. Setting Up Internal Notification Emails
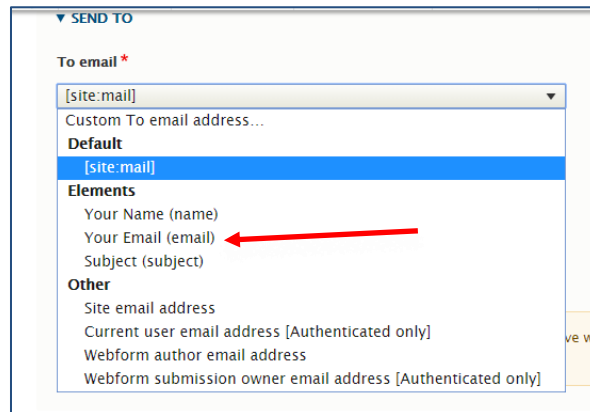
1. Within the *Webform* tab, select the desired form, and select on *Build*. Select the *Settings* tab and then the *E-mails/Handlers* secondary tab.



2. Select the *Add Email* button. Emails are saved emails that can be set to be sent through the webform.
   a. *Add Email*
      i. Add a title
      ii. Change the email to section to custom; and add the custom email you want the submissions to be sent to.

3. Add a second email to generate from the email element of the webform if you would like the person submitting the webform to get a confirmation via email.



4. Select *Save* at the bottom of the page.
5. Repeat this process to send notification emails to multiple entity employees and for various webform uses (such as confirmation emails).

## 25.4. CREATING A CONFIRMATION PAGE

1. Within the *Webform* tab, select the *Settings* tab, and then select the *Confirmation* tab.
2. Select the check box *Page*
3. Populate the content of the confirmation screen in the WYSIWYG under *Confirmation Settings*.
4. Select *Save* at the bottom of the screen.

## 25.5. VIEWING WEBFORM RESULTS

Administrators have access to the Results tab. Results gives a view of all the entries that have been made into the Webform and allows for filtering through the submissions.

**Example Webform Build** ☆

| View | Test | Results | Build | Settings | References | Export |
|------|------|---------|-------|----------|------------|--------|

Submissions    Download    Clear

Home » Administration » Structure » Webforms

## 26. Custom Block Library

Navigate to the Custom Block Library tab by following: *Manage > Structure > Custom Block Library*. Within the Custom Block Library tab, the User can create and edit custom blocks for either the jumbotron or footer rows, or for custom cards created with the Add Card – Block card option.

### 26.1. CUSTOM BLOCK LIBRARY VIEW

Similar to the Content View, the *Custom Block Library View* is a view that allows the administrator to either add custom blocks or edit current custom blocks as well as sort through blocks in the library.



### 26.1.1. Add Custom Block

Custom blocks are a content type that allow customization of content that can be reused across a site. There are two types of custom block that can be created. The first is the Basic Block which allows customization of the title and body content; anything that the WYSIWYG allows can be placed into a custom basic block. The second is the row block. Any row or card can be added to the custom row block similar to building with rows and cards on a page. To add a custom block, the administrator must either select the blue *Add Custom Block* button at the top of the page or select *Add Custom Block* from the path *Manage > Structure > Custom Block Library > Add Custom Block*.

1. Select the type of block: Row or Block
   a. Row: A block that takes up an entire row
      i. Contains: Block Description, any added rows and cards with content.
   b. Block: A block that takes up the space of a card
      i. Contains: Block Description and body.
6. Describe the block in the *Block description* box.
7. Populate the content of the block in the WYSIWYG or using Rows and Cards, depending on block choice.
8. Select *Save* at the bottom of the page.

Repeat this process to create multiple custom blocks.

**26.1.2. Edit Custom Blocks**

To edit a Custom Block, select *Edit* from the operations column in the Custom Block Library View.



The block can then be edited. Select *Save* at the bottom of the page.

Note: If the All Site Footer is being used on the main landing page, the footer can be edited directly from that page by selecting the pen icon in the upper right-hand corner of that row and selecting edit.

## 26.2. ADDING CUSTOM BASIC BLOCKS TO A PAGE

Basic Blocks are custom blocks that do not contain any rows or cards. The only components of Basic Blocks are the Title, and the WYSIWYG Block Content section. To add a basic block to a page, use the Add Card – Block card and select the desired block from the drop-down list.

## 26.3. ADDING CUSTOM ROW BLOCKS TO A PAGE

Row blocks can be placed in the Jumbotron track or in the footer. To place a custom row in the Jumbotron track use the Site Jumbotron or any other custom row block.

1. Navigate to the landing page.
2. Edit the page.
3. Go to the Jumbotron tab.
4. Select either the Site Jumbotron or the Alternate Jumbotron to display.
5. If you selected Alternate Jumbotron, choose the custom row block from the Jumbotron Selection drop-down list.
6. Save the page

To place a custom row in the footer use the Site Footer or any other custom row block.

1. Navigate to the landing page.
2. Edit the page.

3. Go to the Display tab.
4. Select either Show Site Footer or Show Alternate Footer.
5. If you selected Show Alternate Footer, select the custom row block from the Footer Selection drop down.
6. Save the page.

## 27. The Alert Bar

In the case of an emergency, closure, or other important event, use the Alert Content type to post across the top of every page on your site. When published, the Alert Bar exists above all headers on the site.



The editing view of this alert bar is:
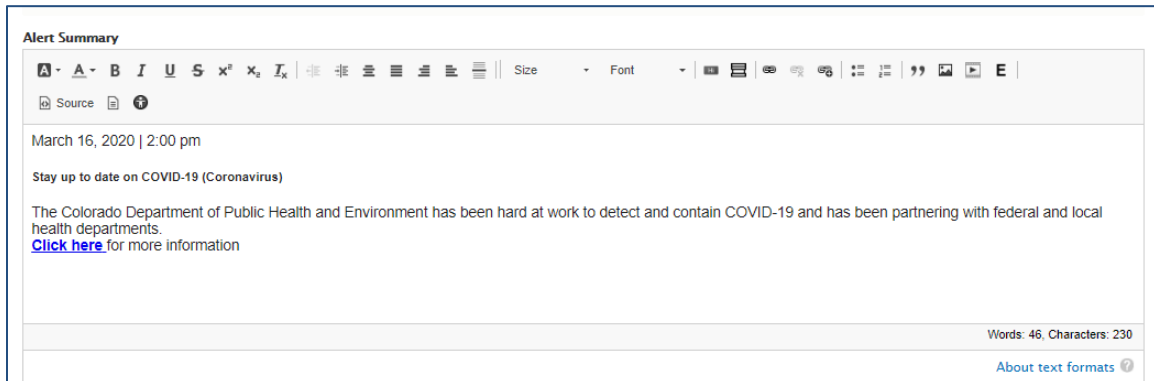


The Alert Bar will show up in Colorado Brand Yellow and will automatically break out into columns based on your content spacing. To create alerts, follow these steps:

1. Navigate to *Content > Add Content > Alert*
2. Add a title and body content

3.  Set any publishing settings to the right (such as scheduled and unscheduled).
4.  Check the *Published* check box at the bottom of the page.
5.  Click *Save* at the bottom of the page.

## 28. How to Start a Migration

If you are starting a migration project from one of Colorado Interactive's Pacific sites, then there are a few tips that the Colorado Interactive training team has for you.

- When you open your site, you will see a generic blank landing page that does not look like your site. This is because the landing page will have to be rebuilt.
- You will also not see your navigation – this will have to be rebuilt as you create the site.

The first thing that you will want to do is open the content library as well as open your Pacific site. Then click on the first page in your navigation on the Pacific site.

1. Locate the page name on the Pacific site page
2. In Pacific, note any images or files on the page and download them
3. In D8, try and locate the files or images, if you cannot find them, upload them to the site using the add media – image option or the add media – document option.
4. In D8, search for the page name in the content library
5. In D8, open the page and edit to verify that all content looks good (including adding images from the media library and any updated files – check the links)
6. In D8, set menu settings for that page
7. In D8, change the settings to *Published* and click *Save* at the bottom of the page.
8. On the Pacific site, click the next page in the navigation and repeat steps 2-8 as necessary.
9. In D8, create the landing page and link to the content you have published

Note: Publish as you work, the site is in the staging environment and as you publish you are able to link more efficiently with the link it tool (automatically created relative path links).

We recommend that you choose to either create all the pages that appear as parent items in the main navigation and then work through each group of child links (A), or to work from each main navigation link down through all the child links and then work across the main navigation (B).

A. Left to right and then child links (follow red numbers in order)
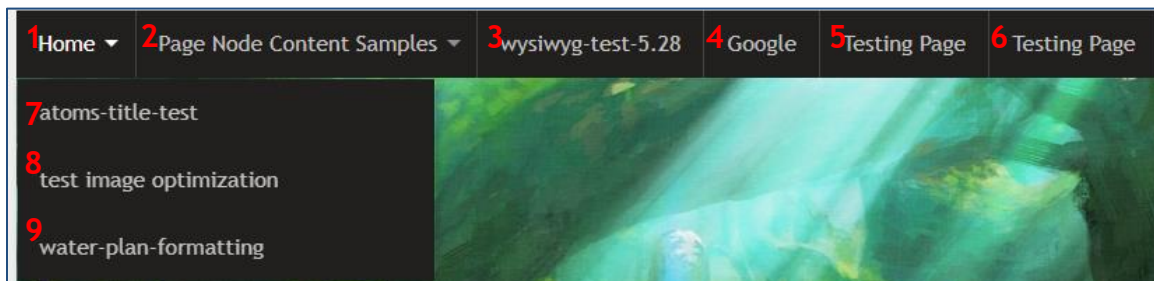
B.  Working through child links as you create main navigation parent links (follow red numbers in order)
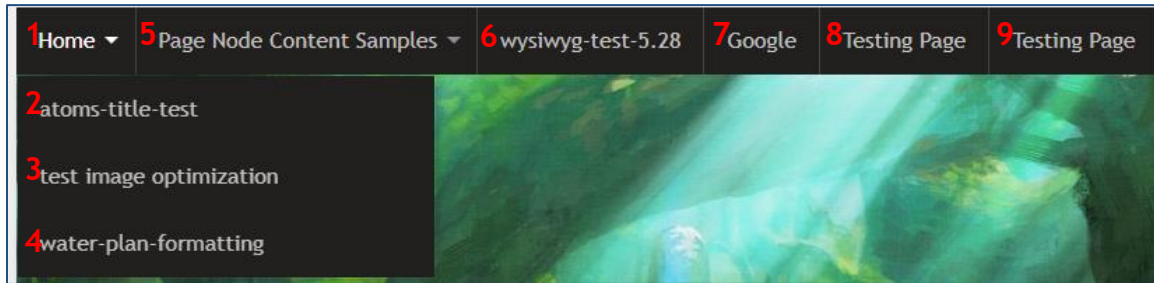
## 29. Accessing the Source Code for HTML

Sometimes you may choose to edit a page directly through the HTML source code rather than in the normal text view or with rows and cards. To edit a basic page or basic card using the HTML source code rather than the normal view, follow these steps.

1. Navigate to the Basic Page or Basic Card you want to edit. For the Basic Cards this will involve editing or adding a row and then editing or adding the basic card.
2. In the WYSIWYG toolbar at the top of the body field, click the *Source* icon.
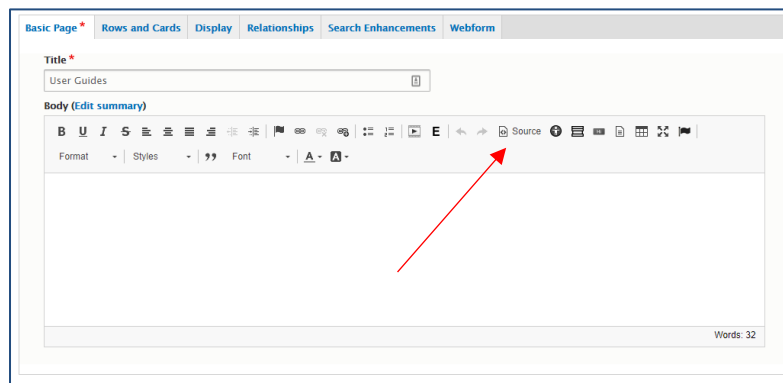


3. If there is no content in the body field, you will not see much of a change. However, if there is a lot of content you will see the HTML version of that content.
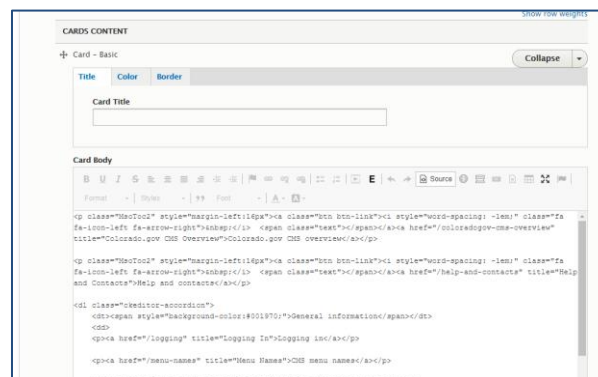


You can edit content in both Source View and Normal View. Click *Save* at the bottom of the page when you are satisfied with your changes.

Note that if you add a large amount of custom code, CI does not support the upkeep and you may cause errors in other places on your site that we cannot support. If you are unsure of using the HTML view and are trying to embed a feed to social media or an iFrame, please use the Open Embed card option.

# 30. Glossary of Site Terms

a. Block – A Block is a region of content. Blocks are chunks of the site that can be populated. A block could be a row, a card, or neither, such as the footer or Jumbotron.

b. WYSIWYG – This is the toolbar within the body of a card. It stands for *What You See Is What You Get*.

c. Button – A Button is an aesthetic choice for a link that the active user can add in the WYSIWYG of a page. The button is more prominent than a link and can be added in one of many styles. Buttons are also referred to as Call to Actions.

d. Card – A Card is a type of content that can be added to the page. Content has been broken up into Cards to enable the WYSIWYG to be more user friendly. Card options include Basic, Map, Icon, Open Embed, and View. Card types can also be called paragraphs.

e. Content – Content is material that the users have added to the site. Content types are organized into cards which are placed on the site in rows. Content can also be added directly into the body of a page using its body content WYSIWYG.

f. View – A View is a way of collecting and seeing material. An example View could be the page where all content is seen.

g. Menu – A Menu is a selection of tabs within a page.
   a. Admin Menu – The Admin Menu is the upper most menu that appears on the screen when the user is logged in. This menu appears black.
   b. Action Menu – The Action Menu is the secondary menu. This menu appears when one of the tabs in the Admin menu has been selected. This menu shows the different actions a user can take.
   c. Page Menu – The Page Menu is the menu that shows up on the individual pages. This menu varies with user roles. Pages can often be edited directly from this menu. The page menu changes depending on which page you are on and which level of page (are you in an editing view or not).

h. Tab – A Tab is a selection that can be made in a menu.

i. Node – A Node is an individual piece of content (media, card, etc.) that is trackable on the site.

j. Row – A Row is a way to horizontally organize cards and the content within them.

k. List – A List is a running tally of all instances of a certain item within the site.

l. Global Settings – Global Settings are settings that remain true across the entire site.

m. User Roles – There are five different User Roles an authenticated user can have, each with specified permissions. These permissions are listed in the following table:

| | User Administrator | Content Administrator | Content Manager | Content Editor | Structure Administrator |
|---|---|---|---|---|---|
| **View Unpublished Content** | | x | x | x | |
| **Create/Edit Pages*** | | x | x | x | |
| **Manage Landing Pages** | | x | | | |
| **Add Media** | | x | x | x | |
| **Edit Media** | | x | x | | |
| **Publish Content** | | x | x | | |
| **View Users** | x | | | | |
| **Create/Edit Users** | x | | | | |
| **Manage Relationships/Tags** | | x | x | x | |
| **View Menu Structure** | | x | x | x | x |
| **Create/Edit Menus** | | x | x | | x |
| **Add/Edit Blocks** | | | | | x |
| **Create URL Alias** | | x | x | | |

## 31. Glossary of Content Types

a. Blog – Blog entries are a content type used to highlight timely information that is relevant to the entity. The three most recently published blog entries will populate in the *Blog* View Card that can be added to any page, with older entries being accessible via the *view all* link.

b. Custom Block – A block is a region of space on the site. By creating a block, Users can highlight a specific paragraph, links, new information, events, videos, and more.

c. Entity Header – The Entity Header is one of the most visible regions of the website; it appears above the top navigation menu across the entire site. The banner can consist of logos, slogans, and/or contact information.

d. Event – An event is an occasion that will take place on a specified date/time. Events that are created will automatically populate the Events page and the Events Calendar. The events calendar is accessible through the View Card and Mini Calendar View.

e. Footer – The footer region displays across the entire site. Popular links for the footer region includes; contact information pages, career information pages, *About Us* pages, and other entity sites. Custom Footer regions can be created using Custom Blocks – Row Blocks.

f. Icon – An Icon is call to action button that can be created using an Icon Card.

g. Jumbotron – The large image the stretches over the landing page of the site.
   a. Alternate Jumbotron – Alternate Jumbotrons can be created that can be used on additional site landing pages.

h. Link – Links lists highlight featured internal and/or external links within a homepage block of the site.

i. News – News entries are a content type used to highlight timely information that is relevant to the entity. The three most recently published news entries will populate in the *News View* card on any page, with older entries being accessible via the *view all* link.

j. Page – Pages make up much of the content on the most sites. They provide information on a specific topic to end users and can contain images, links, iframes, and more.

k. Press Release – A press release is an article type that can be isolated and sorted from both other kinds of articles (blogs, and news).

l. Social Icons – These links help increase referral traffic from the site to the entity's social media pages. If utilized, these icons display in the bottom right across the entire site.

m. Webforms – Webforms allow end users to contact the entity directly through the website, complete website surveys, or provide other information using these customizable forms.

n. Open Embed – An Open Embed is a card that allows the entity to add custom code to a page without accessing the source code. One example of how Open Embed Cards can be used is for social media feeds.

o. View – A view is a sorted collection of content. The view card allows entities to insert cards with recent blog posts, articles, or the mini calendar to a page.

## 32. Security Best Practices

### 32.1. PHYSICAL SECURITY

If there is physical access to the computer, it is easy for a customer to break in or misuse the system.

Do not leave the computer logged in if you are away. Change your computer's settings to automatically lock after 15 minutes or less of non-use. After each use session, make a point to completely log out of your Colorado.gov CMS secure website. Failure to log out may result in the log-in session remaining open regardless of the browser or tab being closed.

### 32.2. SYSTEM MAINTENANCE

Maintain your systems with the most current security patches (aka Service Packs) from your system's vendor. This will close most of the known security holes. Systems should have the most current security patches and up to date anti-virus system per your entities security policy.

### 32.3. PASSWORD SECURITY

Never store password as plain text or write down on paper. Use encryption utilities if you have to store the password in a file for some reason. Do not share your password with anyone, including your coworkers. If a coworker needs an account, contact CI to set up an account for them. Do not reuse a password that you have used somewhere else.