Basic Drupal + Digital Commons Platform Web Training

Agenda

- ❖ **Digital Commons Platform Overview**
- ❖ **How To Start – Logging In**
- ❖ **User Roles And Permissions**
- ❖ **Content Types**
- ❖ **Media**
- ❖ **Creating And Editing Content**
- ❖ **Accessibility**
- ❖ **Advanced Drupal Overview**
- ❖ **Practice Building**

Digital Commons + Drupal Overview

- **What is Drupal**

- **What is Digital Commons**

- **Why Drupal for NC DC?**

- **Importance of Drupal for government websites**

- **Digital Commons Community**

One theme, One code base, 80 websites

Each agency website is a part of the NC Digital Commons Platform

- Built on Drupal, an open-source Content Management System (CMS), Drupal 10

- Developed, and maintained by the State of North Carolina, NCDIT Digital Solutions Team since 2015

- Secure — Websites are hosted on AWS-FedRamp compliant

  - *Editing websites requires a multi-factor log-in*

- Built mobile-first, content is automatically rendered to be presented on mobile devices, tablets and desktop — *(mobile emulator feature for building)*

- Faster load times, using less data, allows embeds for many applications *(like PowerBI or Tableau dashboards, ArcGIS maps etc)*

- Adheres to accessibility compliance standards

  - *The platform is using a new, user-friendly theme, built out in 2022, that is designed for inclusion and accessibility at its core*

  - *The new theme adheres to WCAG 3 accessibility compliance standards to make our websites inclusive for all visitors*

  - *The colors on your website are also preselected and screened to adhere to accessibility requirements*

Digital Commons + Drupal Overview

- **What is Drupal**

- **What is Digital Commons**

- **Why Drupal for NC DC?**

- **Importance of Drupal for government websites**

- **Digital Commons Community**

Digital Commons Community

- **Digital Commons Support site — Bookmark it!**
  - Guide Section
  - Help Topics
    - *Every help topic is also linked from the back end on the platform while building your site*
  - Accessibility Guidelines

- Drupal is an open-source software with a huge community – we are trying to model this within our own Digital Commons Community

- Teams Channel + Sprint Review Updates keeps web managers up-to-date with all the updates and changes

- We empower our users to share their findings and suggestions for platform improvement

- Contact your web manger to submit tickets/requests to help us share information, build community, and build a better platform!

- **Each agency's first point of contact for their website is their Agency Web Manager**

Logging in + Navigating

- **Accessing the Drupal Dashboard**

- **Site Structure Overview**

➢ **Log into Digital Commons Training Site**
- Be on VPN
- **Go to https://dctraining.nc.gov/user**
- Multi-factor Authentication (MFA)
- Assigned Editor role

➢ **Site Structure Overview**
- *The content you create is in the center of the site, but top and bottom menus are created by web manager and are site wide*

- Menus: Utility menu, Main navigation, Footer, Search

We encourage you and your users to utilize search—our websites are powered by Google search—the more it's utilized, the higher ranking your page will have on Google.

User Roles + Permissions

- **Understanding roles and permissions for different groups**

- **Implementing basic user access controls**

➢ Roles are assigned by web managers
➢ Web manager role can be assigned only by Digital Services team
➢ Users should have only one role assigned to them
➢ Each role includes the permission of the roles below it in the hierarchy

- **User Roles (listed here from lowest to highest hierarchy)**
  - **Alert Creator -** Can ONLY create and publish alerts.

  - **Event Creator -** Can ONLY create new items for the event calendar.

  - **Editor – For training purposes**
    - Can create Press Releases, Events, and Blog Posts. Editors may publish Events.
    - Can Edit and Save as draft or Needs review: any Content type, but Landing pages
    - Pages should be created, placed in a menu and published by Web Manager
    - May only delete their own content.

  - **Publisher**
    - Can perform all the Editor functions.
    - Publish existing content.
    - Cannot put items in the menu.
    - May delete only their own content.

  - **Web Manager**
    - Can perform all the previous role functions.
    - **Creates ALL new content that needs to be placed in a menu:** Site Pages, Landing Pages, Data Tables, How To pages and Webforms.
    - Manage menus
    - Administer users on the platform (assign them their roles)

Intro to Content Types

- **What is a content type**

  - **Site Page**

  - **Landing Page**

➤ **Content types are templates for creating web pages**

➤ **Content Types examples on Digital Commons site**

➤ **Site Page**

- Very robust content type

- Bulk of information goes on site pages

- Fewer cards and blocks

- Vertical stack orientation only

- Right rail repeat navigation menu

- Can include documents here

➤ **Landing Page**

- Navigational pages

- Comprised of sets of blocks

- Rows and columns orientation

- Most complex paragraph settings

- Can embed views and webforms to be shown on a landing page

Intro to Content Types

- **Data Table**

- **Alert**

- **How To**

▶ *Content types are templates for creating web pages*

▶ *Content Types examples on Digital Commons site*

- **Data Table** – DC Training example
  - Dynamic search tables
  - Option of how many entries to show
  - Colors based off your theme
  - Users can export the data in CSV format

- **Alert -** An Alert block with severity level can appear on every published page, or on specific pages or sections, displaying a brief message near the top of the screen.
  Four alert levels: Info = Blue, Success = Green, Warning = Orange, Breaking = Red
  - Live Example - NCDHHS Covid Response Site
  - Digital Commons Alert Help Topics Page

- **How To -** The How To content type is intended to be used for agency services pages to provide step-by-step guidance on common processes.

  Example of the How To page

Intro to Content Types

- **Content Types in Views**

- **Press Releases**

- **Blogs**

- **Events**

- **Catalogs**

▶ *Content types are templates for creating web pages*

▶ *Content Types examples on Digital Commons site*

Views

- A view is a grouping of a particular content type (list, grid/blocks)

- Views allow the display of dynamic content based on parameters provided.

- Each site has default views set up, or customized views which can be set up by web managers

- PR, Blogs, Events all very similar content types in that they show up in the form of views—how they're displayed

- When you create an event, blog, or PR, it will automatically be added to the view based off taxonomy terms

- **Press Release [View] -** Example List View

- **Blog [View] -** Published articles

  - Example: Blog Grid View

  - Blog List View

- **Event [View] –** Example Block Grid Events

- **Catalog [View] –** A user defined filtered list which is pulled into a view

  - Catalog Example

Intro to Content Types

- **Webforms**

- *Content types are templates for creating web pages*

- *Content Types examples on Digital Commons site*

- **Webforms**

  - Webforms range from simple to more complex forms with conditions

  - We have classes about webforms

  - We don't allow uploads of documents/assets in webforms – Drupal isn't set up for that

    - If they do need that functionality, they can look elsewhere and just embed it

  - Example

Managing Media

- **Media Library**

- **Media Types**

- **Adding Media + Alt Text**

Media Library

- The Media Library module allows users to find and sort existing media and add new media on a website.

Four types of media:

- Images

- Documents/files

- Audio files

- Icons

▶ *You can't upload video files, but you can embed links from YouTube or Vemeo*

- Filtering area; options of images only, documents only, etc

- Thumbnails for image and icon media entities

- Adding media and media edit options

- Adding new media item + alt text

▶ [Media Library Help Topic On Digital Commons Support Site](#)

Creating and Editing Content

- **Adding a New Page**

- **Editing Existing Pages**

- **Accessibility**

▶ **Adding a New Page**

- Only web managers can create Site page, Landing page, How-To content

- Whatever title you make the page will become a part of the URL

- Summary section, an opportunity to add metadata to a page.

  - Metadata helps identify a page in a search engine (Accessibility)

▶ **Editing Existing Pages**

- **Inserting for formatting page content**

  - Front-end and back-end comparison examples

- **Adding Images and Media**

  - Add in header + CTA

- **Inserting and Formatting Text**

  - Importance of Accessibility

▶ Accessibility

Managing Menus
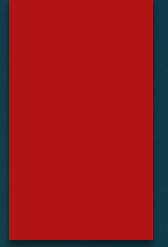
- ▶ **Site Structure**
- ▶ **Utility Menu vs Main Menu**
- ▶ **Breadcrumbs**
- ▶ **Right Rail**
- ▶ **Mobile Menu changes**
- ▶ **Put Site Page in the Menu to view Right Rail menu appear**
- ▶ Guidance: https://digitalcommons.nc.gov/guide/help-topics/site-page

Taxonomy

➢ **Taxonomy helps organize by Terms and Topics**

➢ **Tagging Events, Press Releases and Blogs w Taxonomy**

➢ **All these content types will appear in Default Views**

➢ **Guidance: https://dctraining.nc.gov/news/press-releases**

Administering Users

- **User Roles on Digital Commons website**
- **Guidance: https://digitalcommons.nc.gov/guide/platform-roles-and-permissions**

- **Note User Menu change for editors and web managers**

Practice Building Content

▶ **Site Page**
▶ **Event**

Training Site: Page Content Examples

- Show front and back end
- Drop down menu to add page content