Project Management Office

Pacific User Guide – Content Manager

Pacific CMS

User Guide

Version 3.0

7/28/2016

TABLE OF CONTENTS

1. Pacific Overview

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

2. Help and Contacts

If you have questions or issues when populating your content, contact your Colorado Interactive Project Manager directly. 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 800-970-3468 (Toll Free) (Available Monday-Friday, 8:00 a.m. – 5:00 p.m.)
MAIL:	Colorado Interactive 600 17th Street, Suite 2150 South Denver, CO 80202

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 will reach out to the appropriate contact at Colorado Interactive.

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

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

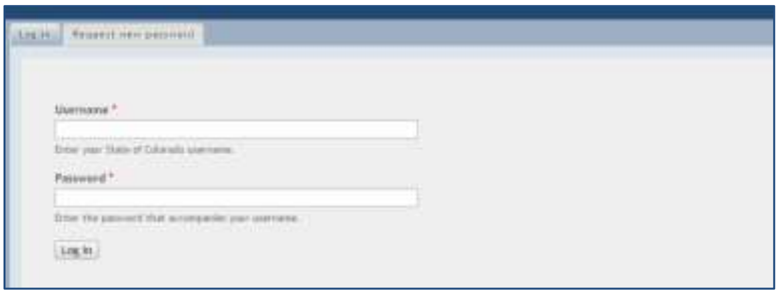
3. General Information

The following section provides instructions on logging into and navigating your Pacific website, saving and publishing content, and creating revisions.

3.1. Logging In

In order to log into the site, a user must have requested and obtained login credentials. Contact your Entity Project Manager to get a new Pacific account.

1. Navigate to www.colorado.gov/pacific/user.
2. Enter your credentials and click *Log in*.



3.2. Admin Menu

When logged in, you will see a red bar across the top of your screen. This is the admin menu. You will use the admin menu to return to your user profile page; log out; and create, edit, and search content.

The house icon will take you to the minisite homepage; hover over it to get the *User Profile Page* option.

Hover over the Content section to see options create new content and view a list of existing site content. The easiest way to locate, edit, and delete existing content is with the *Content (Current Site)* view, accessible in the Content section.

3.3. Content (Current Site) View

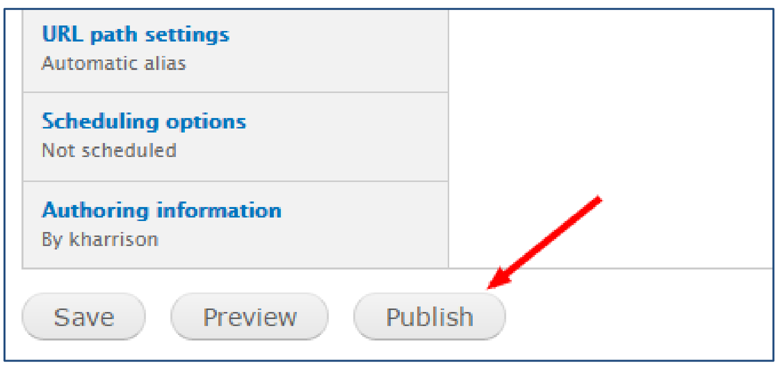
The *Content (Current Site)* view is a sortable table that shows all site content. Access this view by hovering over *Content* and selecting *Content (Current Site)*. Users can filter content by Title, Type, Author, or Published/Unpublished. Additionally, users can view, edit, or delete content directly from this view.

A feature that is available from the *Content (Current Site)* view that should only be used infrequently is mass operations, which allow users to publish, unpublish, delete, or change authoring information on multiple pieces of content at a time.

3.4. Publishing

After creating new content, select the *Publish* button at the bottom of the page to add it to your minisite. Publishing content automatically saves it.

You can save your content without making it visible to unauthenticated users by selecting the *Save* button. Content that is saved but not published will not show in the navigation menu. Any links to unpublished content will result in an error message for unauthenticated users; authenticated users will see unpublished content with a light pink background.



3.5. Scheduled Publishing

Clicking Publish or Unpublish causes content to instantly be available to or hidden from unauthenticated visitors to your site, but you can also schedule content to publish and/or unpublish at a specific time and/or date.

1. Click on the *Scheduling options* tab at the bottom of the create screen.
2. Enter the date and time you wish to publish and/or unpublish your content.
    a. Note that this feature uses a 24-hour clock.
3. Click *Publish*.

3.6. Creating Revisions

If you create a revision while editing content, you will be able to revert back to that version later. We recommend saving revisions prior to making significant edits to a page. To save a new revision:

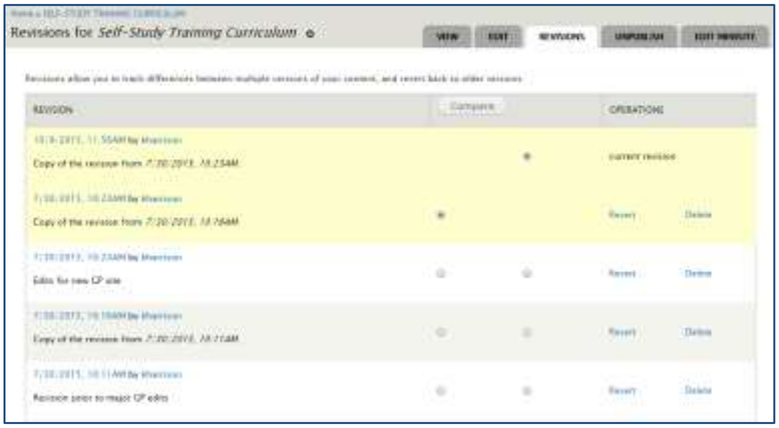
1. Click on the *Revision information* tab at the bottom of the create screen.
2. Select the *Create new revision* checkbox. Enter descriptive text in the message field, if desired.
3. Save or publish the page.

3.6.1. Reverting Content to a Previous Version

Pacific allows users to revert content to previous versions *if* new revisions were saved as explained in Section 3.6. To revert your edits:

1. Click on the *Revisions* tab at the top of the selected page.

2. Find the saved version that you want to revert back to.



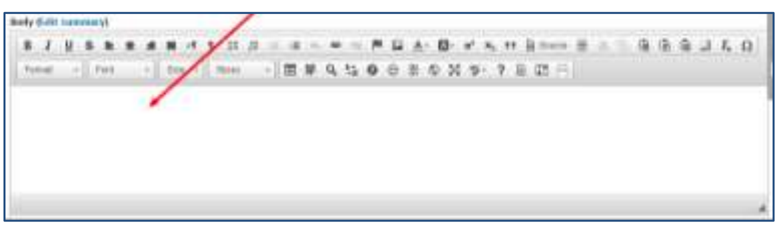
3. Click on the revert link in the *Operations* column.
4. Confirm your request by selecting the *Revert* button.

4. Creating a Page

1. Go to *Content* > *Create* > *Page*.

2. Title your page.
3. Select the minisite(s) with which your page should be associated. If you are only provisioned to one minisite, that site will automatically be selected.

4. Populate the content of your page within the WYSIWYG area:



5. Save or publish the page.

5. Adding a Page to the Navigation

1. Select the *Provide a menu link* checkbox.

2. Provide a menu title. If this field is not changed, the menu 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, your page will be added as a top level item within the navigation menu.
4. Weight your page. A lighter page (smaller numbers, e.g., -25) will fall further left or higher up in the navigation than pages with a heavier weight (larger numbers, e.g., 25).

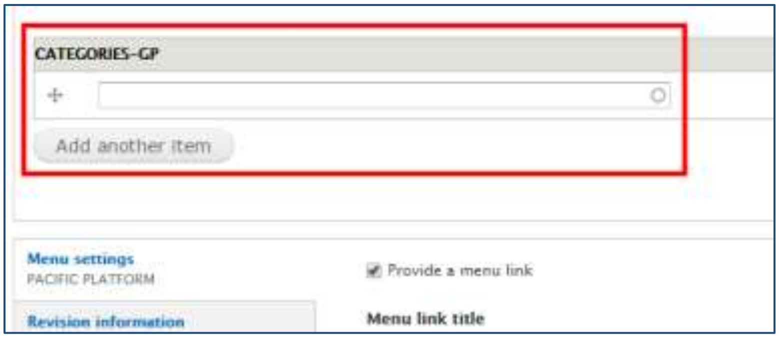
5.1. Adding a Page to the Left Navigation

The top navigation can be duplicated within a left navigation menu on pages and webforms by selecting the *Display Left Contextual Menu* radio button beneath the body text area of a page.

6. Adding a Page to a Category

MSAs must create at least one category before CMs can associate pages with categories.

1. Begin typing the category name in the *Categories* section, which is located toward the bottom of the *Edit/Create Page* screen.
    a. Click *Add another item* to associate the page with multiple terms.



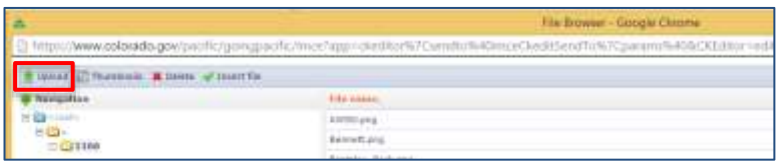
2. Save or Publish the page.

7. Adding an Image to a Page

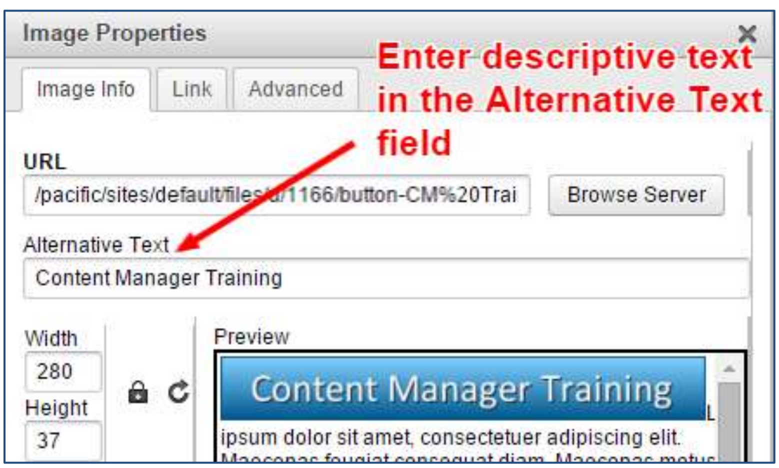
Images help break up large areas of text with illustrations, photographs, and graphics that supplement the text within the page. We recommend adding images using Scald, which is addressed in Section 11. However, users can also add images using the image buttons within the WYSIWYG toolbar.

1. Click on the image button in the WYSIWYG toolbar.

2. Click the *Browse Server* button located within the *Image Properties* dialog box.
3. If the image has not yet been added to your image server, click the *Upload* button in the top left corner of the next pop-up box. Otherwise, proceed to step 4.



4. Select the image from the list in the *File name* column. Then click *Insert file*.
5. Add alternative text in the Image Properties dialog box.
    a. Alternative text is used by screen readers to describe images to users with vision impairments. It is important that you entre descriptive text to assist these users and to be 508 compliant.

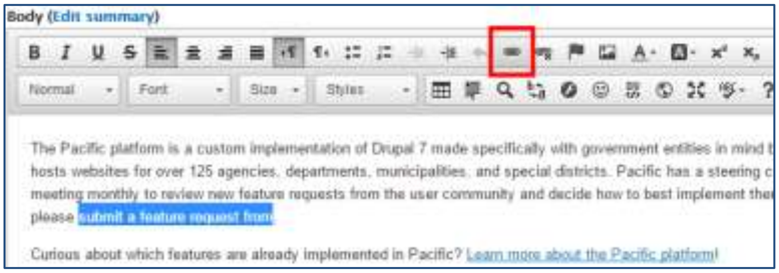


6. Make any other desired changes within the dialog box. Setting the alignment functions similarly to text wrapping in a word processing program.
7. Click *OK*.

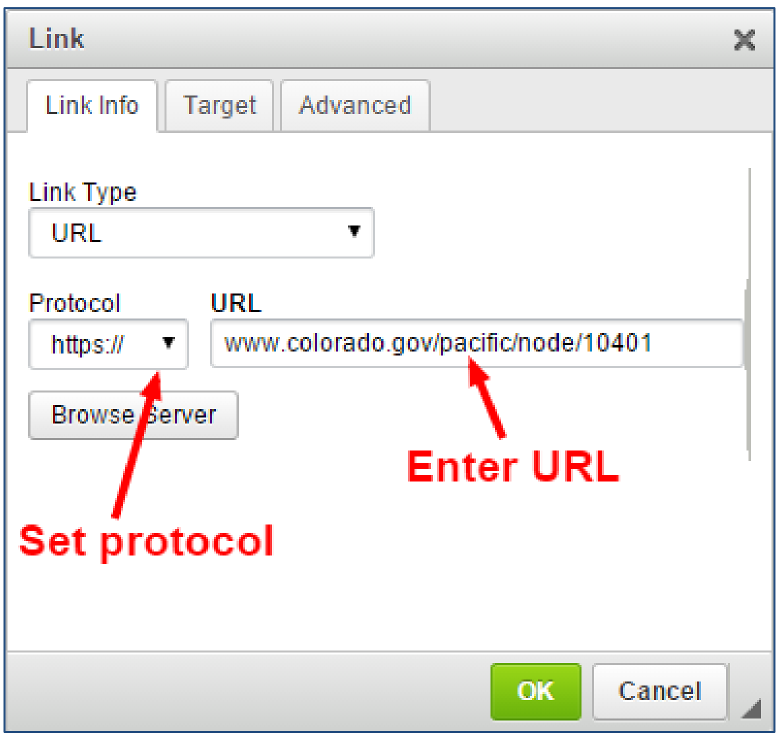
8. Adding Links to Content Text

Add links to your content text using the steps below. This process is the same for any content types that use a WYSIWYG to add text to Pacific.

1. Within the WYSIWYG area in the edit screen, highlight the text you want to turn into a link and click the link button from the WYSIWYG toolbar.



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. Change the *Protocol* dropdown to the correct setting.



3. Click *OK*.

Note: We recommend using relative path links when creating links to Pacific pages. Learn about creating relative path links in the Creating Relative Path Links in Pacific guide, available at www.colorado.gov/goingpacific/pacific-training.

9. Using the Scald File Management Tool

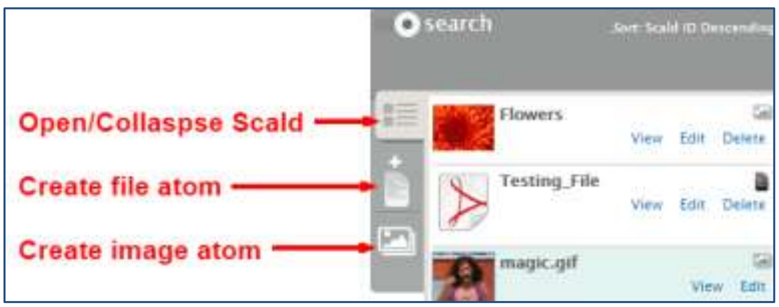
Scald is a file management tool that allows users to share files and images across their minisite(s) using atoms. Atom is the term used for the individual items within Scald. Scald is ideal for files that are frequently updated since the tool allows you to easily replace them without breaking links.

As a CM, you can use all atoms within your minisite(s), but can only edit and delete those that you created. Speak with an MSA-level user for assistance editing an atom you didn't create.

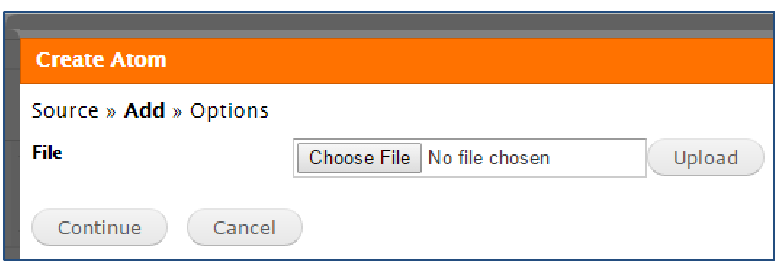
9.1. Creating an Atom

Scald is accessible from create/edit screens for the following content types: blog entries, events, news entries, pages, and text areas. Navigate to a *Create* or *Edit* screen for any of these content types and follow the steps below to create an atom.

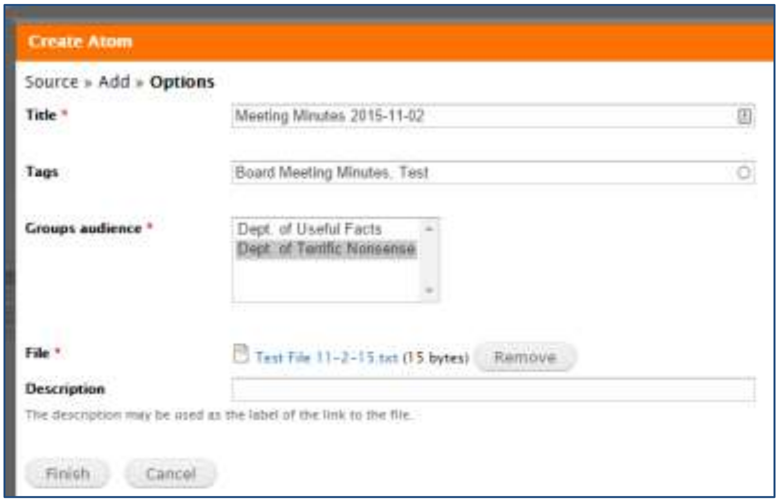
1. Select the appropriate icon beneath the plus sign to add a file or image atom.
   a. File atoms allow the following file types: txt, pdf, doc, docx, xls, xlsx, ppt, pptx, zip
   b. Image atoms allow the following file types: jpg, jpeg, png, gif



2. Browse for and upload the desired file or image. Click *Continue*.



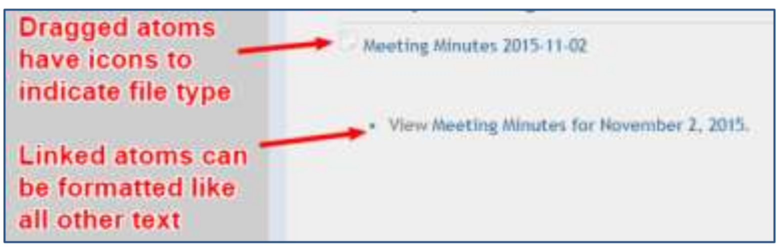
3. Complete the information on the *Create Atom* screen.
   a. Use tags to make it easier to search for atoms later. Use commas to separate tags if using more the one.
   b. You can assign an atom to any group(s) to which you are provisioned.



4. Click *Finish* to save the atom. Upon clicking *Finish*, the atom will be available for all users provisioned to the minisites selected in the *Groups audience* menu.

9.2. ADDING AN ATOM TO A NODE

Users can add file atoms to pages and other nodes by dragging them into the WYSIWYG or by creating links. Atoms will function the same way with both methods (e.g., users will download documents, links will not need to be updated when a file is uploaded), but have a different appearance on the page.



Add image atoms to pages and other nodes by dragging them into the WYSIWYG.

9.2.1. Dragging an Atom to a Page

1. Enter the *Edit* or *Create* screen for the node to which you want to add an atom.
2. Locate the desired atom by expanding Scald. To narrow results, search for atoms using *Title*, *Type*, and/or *Tags*.

3. Click and drag the atom into the WYSIWYG area. Delete extra text if desired.

9.2.2. Linking a File Atom in WYSIWYG Text

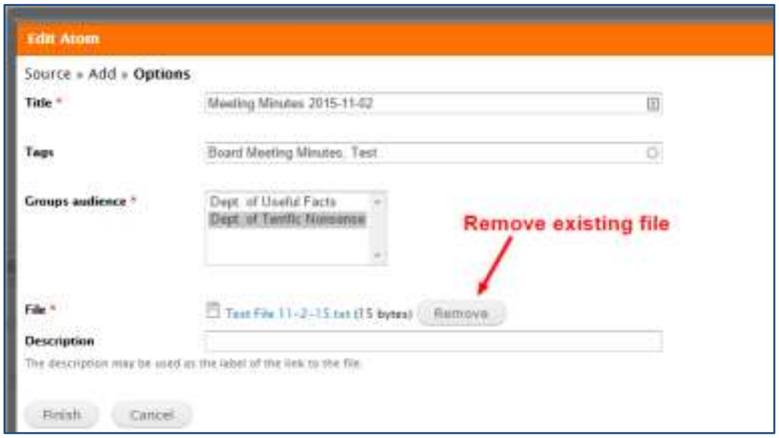
1. Enter the *Edit* or *Create* screen for the node to which you want to add an atom.
2. Locate the desired atom by expanding Scald. To narrow results, search for atoms using *Title*, *Type*, and/or *Tags*.
3. Right click the *View* link that correlates with the atom. Select *Copy link address* (Chrome) or the comparable option in your browser.

4. Create a link as described in Section 8 on page 14.

9.3. Editing an Existing Atom

1. Click the *Edit* link that correlates with the atom you wish to edit.

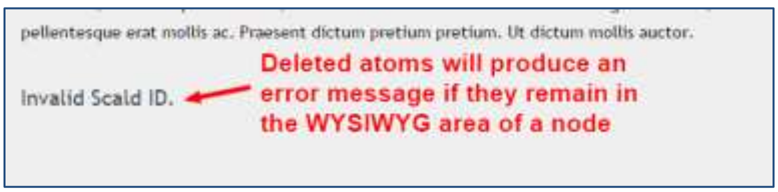
1. If replacing the file within the atom, click the *Remove* button next to the file or image name within the *Edit Atom* screen. Then browse for and upload the new file or image. Make any desired changes to other fields.



2. Click *Finish*.

9.4. Deleting an Atom

It is generally advisable to edit an atom to contain current information instead of deleting it because end users will see an error message if an atom that is within the site content is deleted.

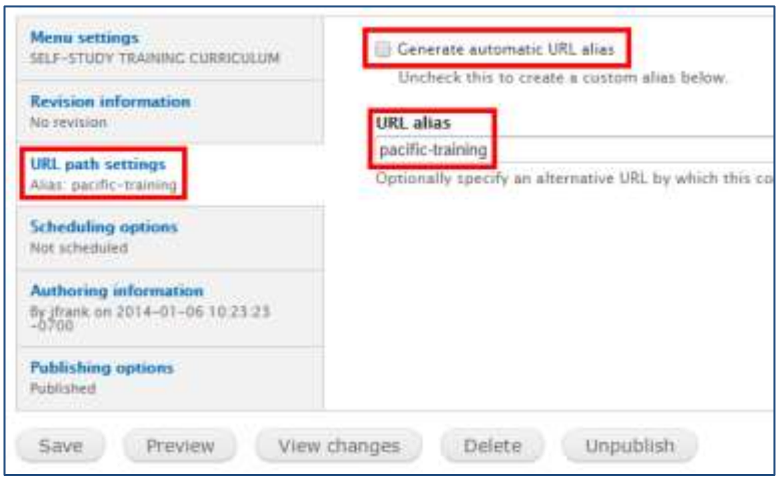


If deletion is necessary, click the *Delete* link that correlates with the atom. Then click *Delete* on the confirmation screen.

10. Creating Custom URL Aliases

Users have the ability to create custom URLs for pages and other content types. All URL aliases must be unique; you will receive an error message if you attempt to create a custom URL that is already in use elsewhere on the Pacific platform.

1. Click the *URL path settings* menu tab at the bottom of the *Create* or *Edit* screen.
2. Uncheck the *Generate automatic URL alias* box.
3. Enter the desired custom URL.
4. Save or publish the content node.



If you do not create a custom URL alias, the URL will be automatically generated based on the page title. This means that changing the page title will change the URL unless you uncheck the *Generate automatic URL alias* box. Find complete instructions in the Preventing Changes to Pacific URLs guide, available at www.colorado.gov/goingpacific/pacific-training.

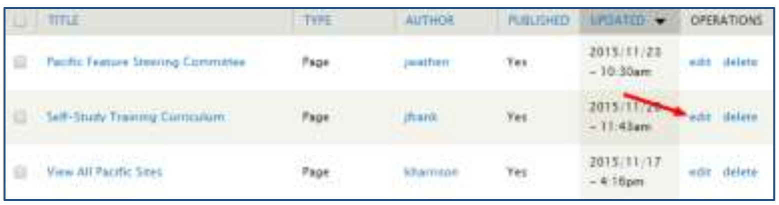
11. Editing Existing Content

All content types can be edited from the content list view. Pages and certain homepage items can be edited by navigating to the content within the minisite.

11.1. Editing Content from the Content List

1. Click *Content (Current Site)* under *Content* within the admin menu.

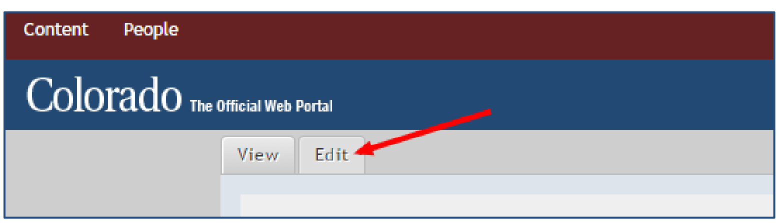
2. From the list view, find the node you want to edit and click the corresponding *Edit* link. You can browse or search to locate the node.



3. Edit the node and click *Save*.

11.2. Editing Pages within the Website View

1. Navigate to the page you want to update. This process will also work for blog posts, events, news posts, and webforms.
2. Click the *Edit* tab at the top of your screen.



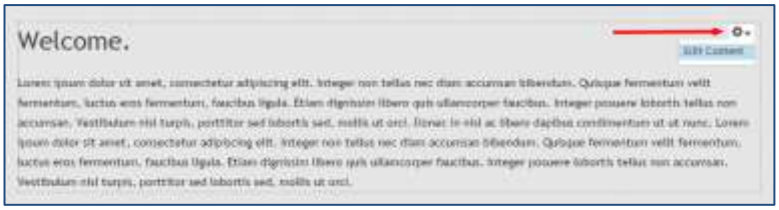
3. Edit the page and click *Save*.

11.3. Editing Homepage Content within the Homepage

Content managers can edit the following content types directly from the homepage:

- Blog posts
- News posts
- Slider images
- Text areas

1. Hover over the content area you want to update.
2. Click the gear that appears in the upper left corner and select *Edit Content*.



3. Edit the node and click *Save*.

12. Publishing/Unpublishing & Deleting Content

The *Create*/Edit screens have several button options at the bottom of the page: Save, Preview, Publish, Unpublish, 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 unauthenticated users.
- Unpublishing content saves changes and hides content from unauthenticated users.
- Deleting content permanently removes the node and any revisions from the minisite.

You can publish, unpublish, or delete multiple nodes at a time within the *Content (Current Site)* view.

12.1. Performing Mass Operations

1. Navigate to the *Content (Current Site)* 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 *Operations* dropdown menu.

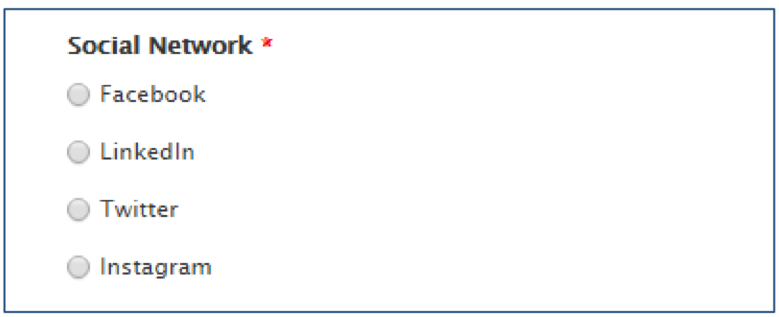
4. Click *Execute*. You will get a confirmation page if deleting content; publishing and unpublishing operations do not have confirmation pages.

13. Creating Social Media Icons/Links

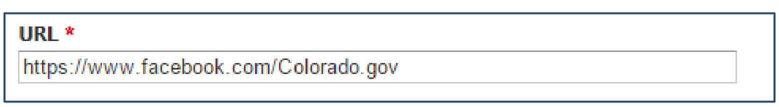
Social links increase referral traffic to your entity's social media pages. Social links display across all minisite pages toward the bottom right of the screen. More recently created social links will appear to the left of older social links.

1. Go to *Content* > *Create* > *Social Link* in the admin menu.

2. Select the appropriate social media platform.



3. Select the minisite(s) with which the social link should be associated in the *Groups audience* menu.
4. Paste the URL for your entity's social media page in the *URL* field.



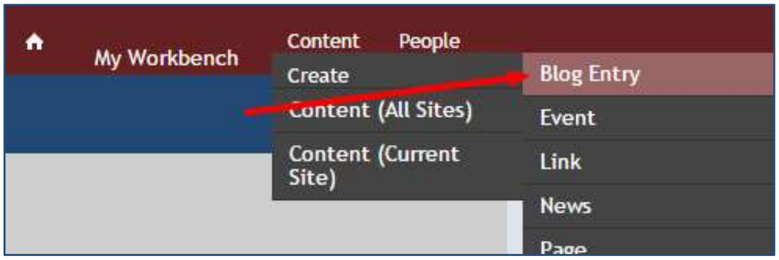
5. Save or publish the node.

Repeat this process to add links to multiple social networks.

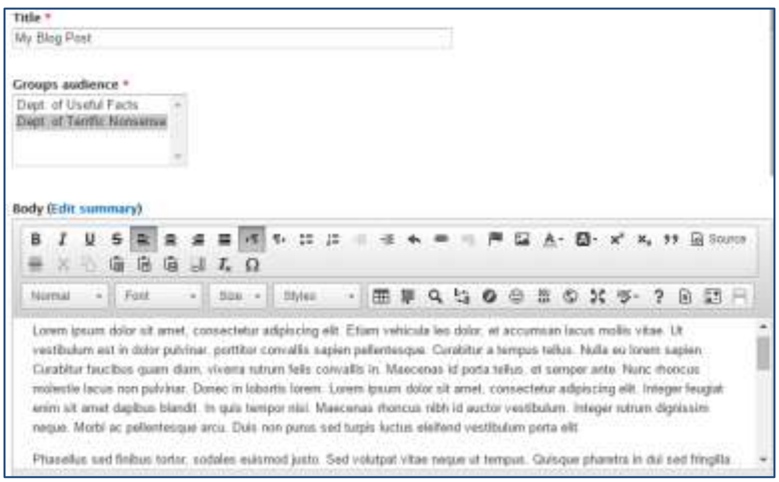
14. Creating Blog Entries

An MSA must set up the homepage to display the Blog block in order for blog entries to be accessible without the use of a link.

1. Go to *Content* > *Create* > *Blog Entry* in the admin menu.

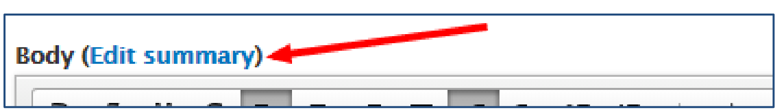


2. Title your blog entry.
3. Select the minisite(s) with which the blog post should be associated in the *Groups audience* menu.
4. Populate the content of the blog entry in the WYSIWYG.



5. Save or publish the node.

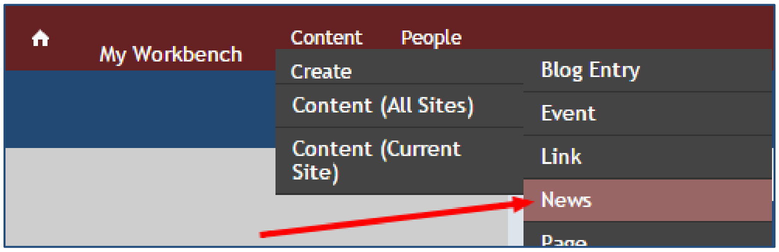
TIP: Customize the homepage preview by clicking *Edit summary* and entering homepage preview text. Keep previews brief.



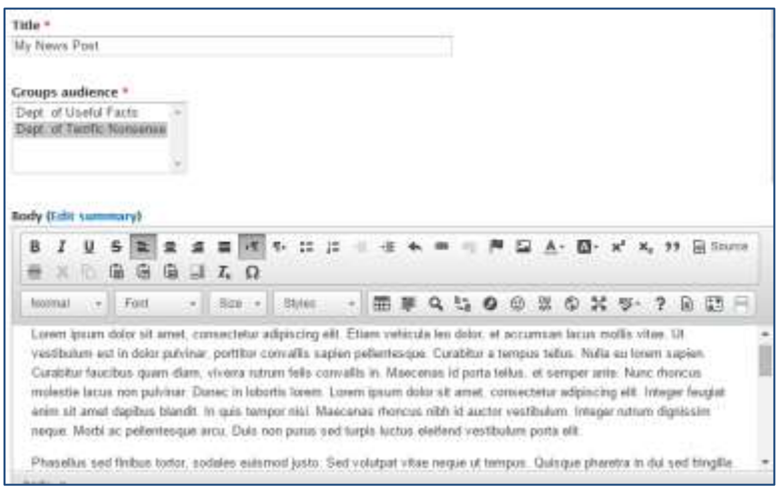
15. Creating News Entries

An MSA must set up the homepage to display the What's New block in order for news entries to be accessible without the use of a link.

1. Go to *Content* > *Create* > *News* in the admin menu.

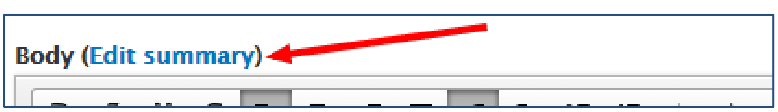


2. Title your news entry.
3. Select the minisite(s) with which the news post should be associated in the *Groups audience* menu.
4. Populate the content of the news entry in the WYSIWYG.



5. Save or publish the node.

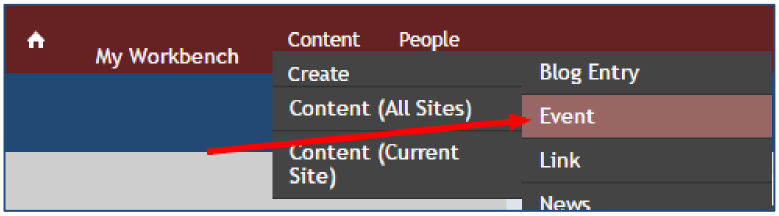
TIP: Customize the homepage preview by clicking *Edit summary* and entering homepage preview text. Keep previews brief.



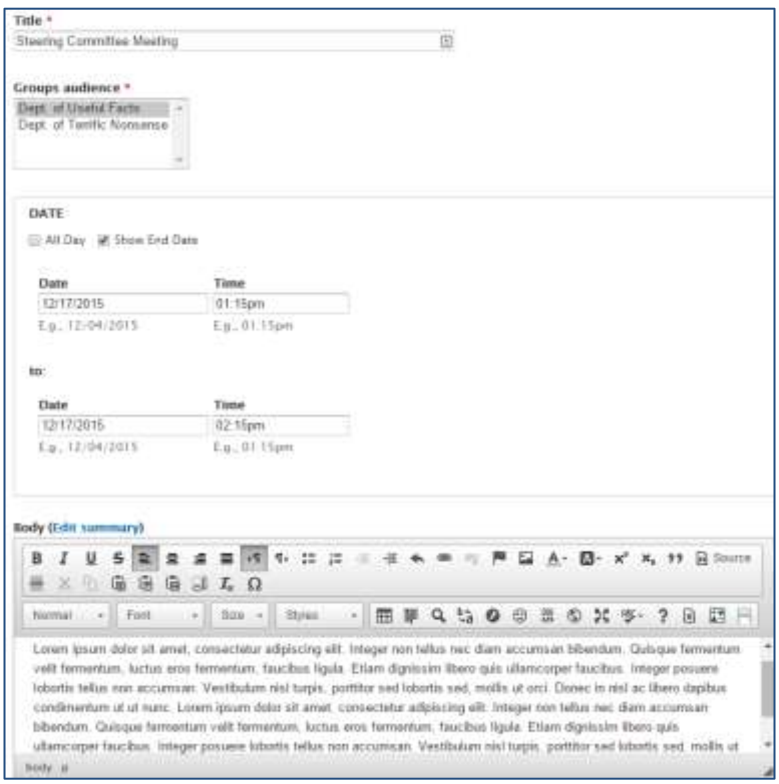
16. Creating Events

An MSA must set up the homepage to display the Events block in order for events to be accessible without the use of a link.

1. Go to *Content* > *Create* > *Event* in the admin menu.



2. Title your event.
3. Select the minisite(s) with which the event should be associated in the *Groups audience* menu.
4. Select the appropriate date and time settings.
5. Populate event details in the WYSIWYG.



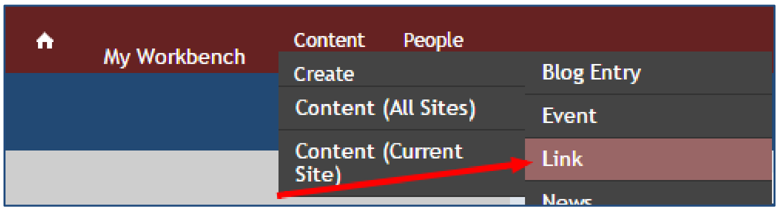
6. Save or publish the node.

17. Creating a Links List

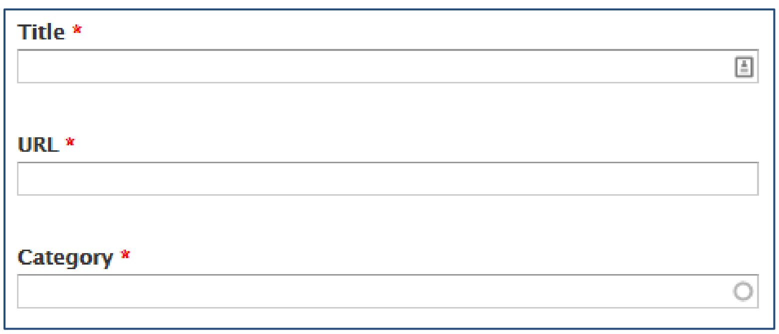
An MSA must set up the homepage to display the Links block in order for the link content type to be accessible.

Please note that the link content type is not how to add links within body text; see Section 8 on page 14 for instructions on creating links within the WYSIWYG.

1. Go to *Content* > *Create* > *Link* in the admin menu.



2. Title your link.
3. Paste the destination URL in the *URL* field.
4. Enter the desired category in the *Category* field (e.g., State Services, Resources, etc.).

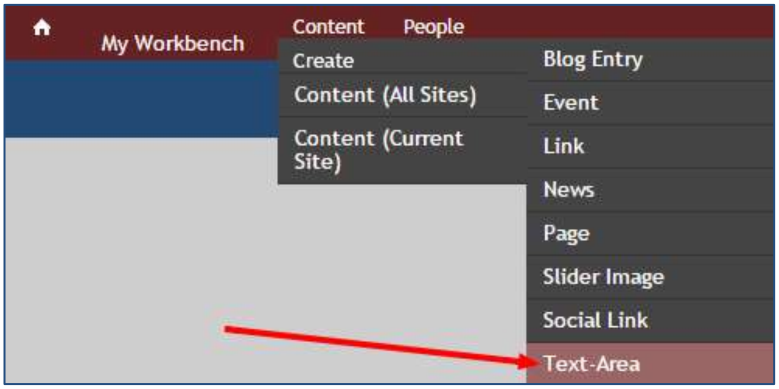


5. Select the minisite(s) with which the link should be associated in the *Groups audience* menu.
6. Save or publish the node.

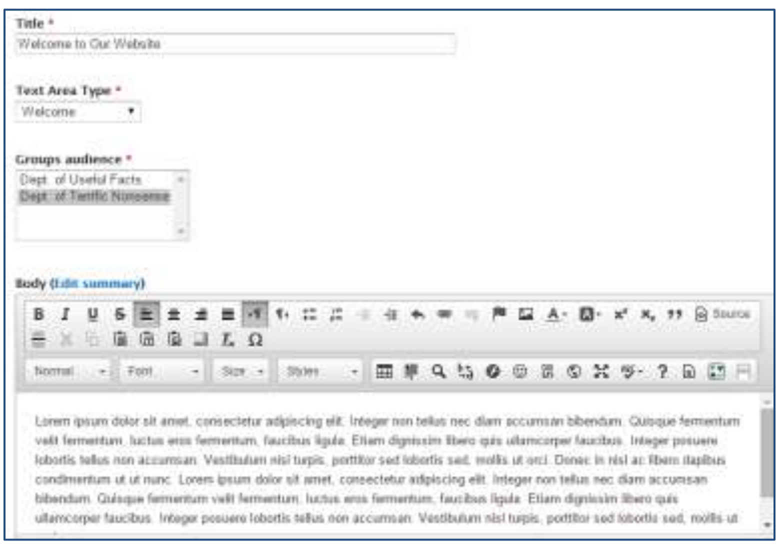
18. Creating Welcome Text Areas

Welcome text areas appear on the homepage immediately below the slider images, or immediately below the top navigation if no slider images are used.

1. Go to *Content* > *Create* > *Text-Area* in the admin menu.



2. Title your text area.
3. Select *Welcome* from the *Text Area Type* dropdown menu.
4. Select the minisite(s) with which the text area should be associated in the *Groups audience* menu.
5. Populate the content of the text area in the WYSIWYG.

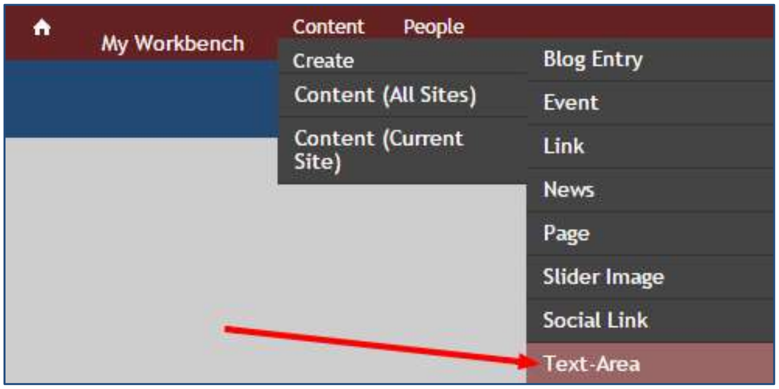


6. Save or publish the node.

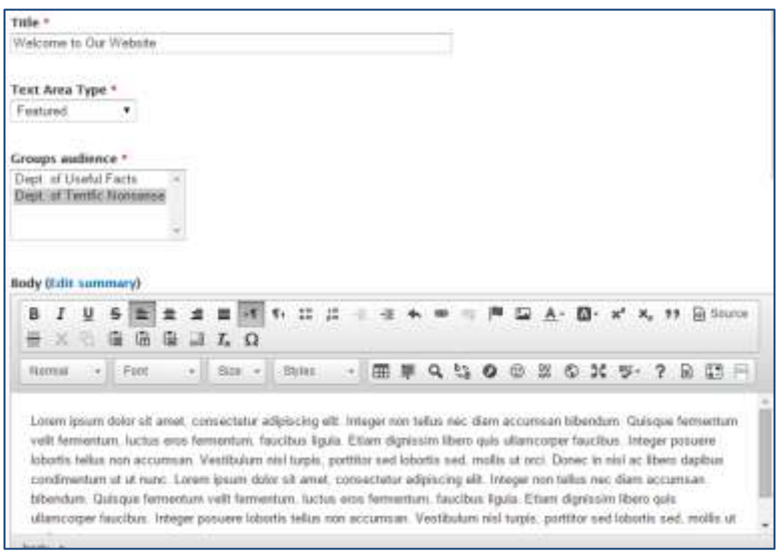
19. Creating Featured Text Areas

An MSA must set up the homepage to display the Featured block in order for the link content type to be accessible.

1. Go to *Content* > *Create* > *Text-Area* in the admin menu.



2. Title your text area.
3. Select *Featured* from the *Text Area Type* dropdown menu.
4. Select the minisite(s) with which the text area should be associated in the *Groups audience* menu.
5. Populate the content of the text area in the WYSIWYG.



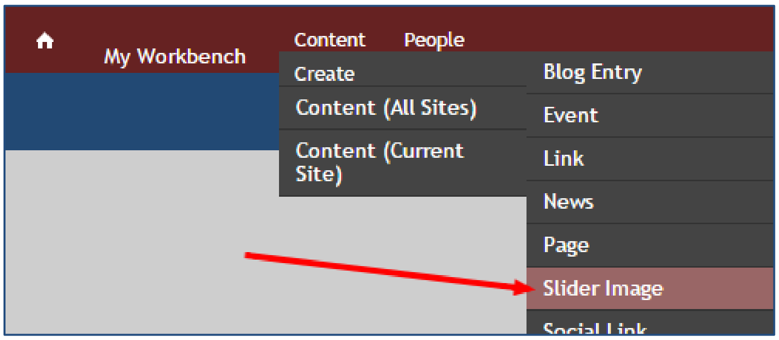
6. Save or publish the node.

20. Creating Slider Images

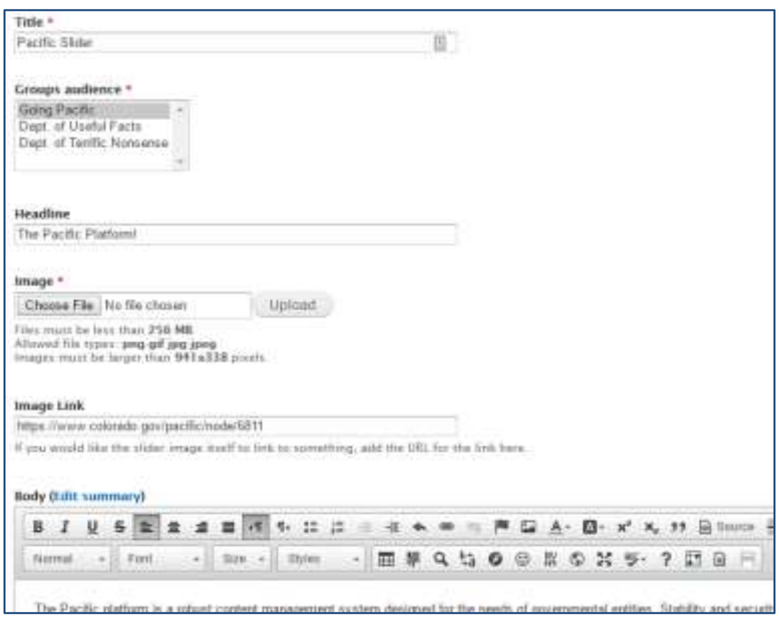
Slider images appear immediately below the top navigation menu on the homepage. You can add multiple slider images to create a carousel; we recommend having no more than six published slider images at a time.

Slider images must have a minimum dimension of 941 x 338 pixels and be no larger than 256 MB.

1. Go to *Content* > *Create* > *Slider Image* in the admin menu.



2. Title your slider image. The title will not display to unauthenticated users.
3. Select the minisite(s) with which the slider image should be associated in the *Groups audience* menu.
4. If you want a header to display beneath your slider image, put header text in the *Headline* field.



5. Click *Choose File* and upload the desired image in the *Image* section.
6. Click *Crop* after the image uploads and select a cropped portion of the image. Click *Save* when you are happy with the selection.

7. If you would like your slider image to link to specific page or website, paste the destination URL in the *Image Link* field.
8. If you would like content text associated with the image, populate it in the WYSIWYG.
9. Save or publish the node.

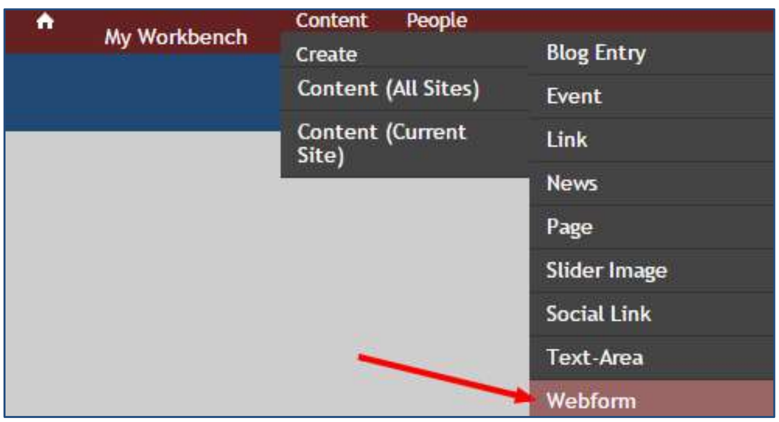
21. Using Webforms

While all users can create webforms, the *Results* tab is only visible to MSAs. Additionally, only the MSA who authored the webform can access the results tab. The easiest way to ensure your team can access the results tab is to transfer the authoring information to an MSA.

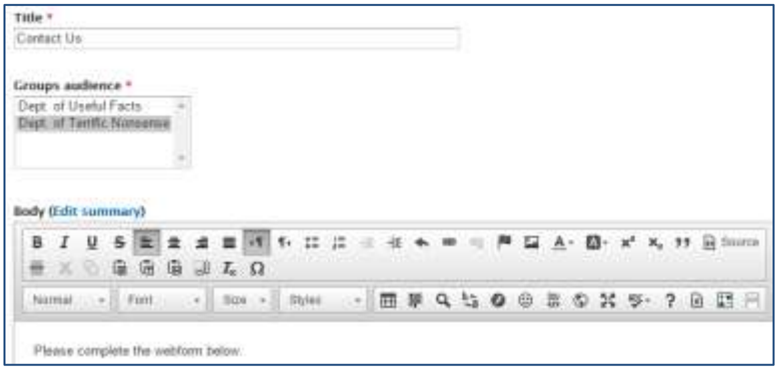
Please note that Pacific webforms should not be used to collect personally identifiable information (PII).

21.1. Adding a Webform to your Minisite

1. Go to *Content* > *Create* > *Webform* in the admin menu.



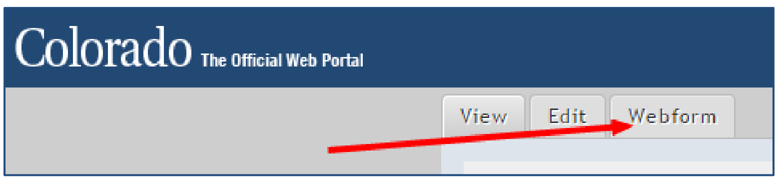
2. Title your webform.
3. Select the minisite(s) with which the webform should be associated in the *Groups audience* menu.
4. Populate any introductory text for the webform in the WYSIWYG.



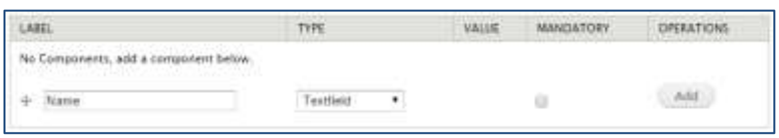
5. Save or publish the node.

21.2. Adding Fields to Your Webform

1. Click the *Webform* tab at the top of the page to add fields to your webform.



2. Title the form in the field in the *Label* column and select a field type from the dropdown menu in the *Type* column. If desired, you can make a field mandatory by marking the checkbox.
3. Click *Add* to advance to the *Edit component* screen.



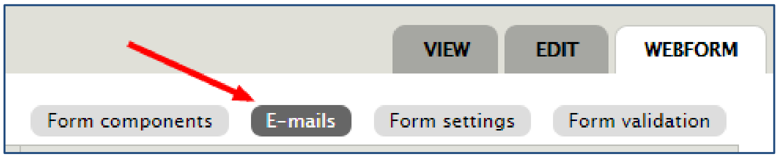
4. Make any desired changes to the form field within the *Edit component* screen and click *Save component* at the bottom of the page.
5. Repeat steps 7-9 for each form field you want to add. When done, click *Save*.

21.3. Adding Email Recipients to Form Submissions

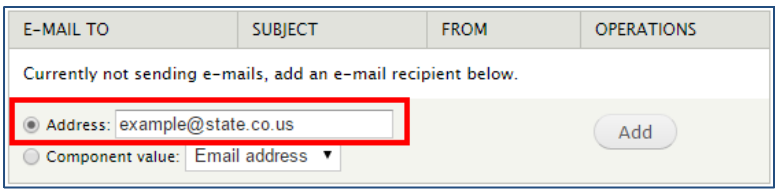
You can set up the webform to send submission information to entity employees, allowing your team to receive prompt notifications of submissions. Pacific also allows you to set up confirmation emails to be sent to the individual who submitted the webform if you include *E-mail* as one of the form fields.

21.3.1. Setting Up Internal Notification Emails

1. Within the *Webform* tab, click the *E-mails* button toward the top of the screen.



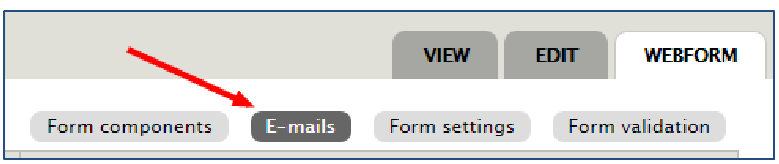
2. Select the *Address* radio button and enter the internal user's email address.



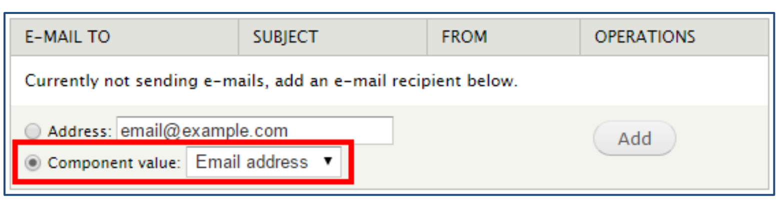
3. Click *Add* to advance to the *Edit e-mail settings* page.
4. Click *Save e-mail settings* at the bottom of the page.
5. Repeat this process to send notification emails to multiple entity employees.

21.3.2. Setting Up Submission Confirmation Emails

1. Within the *Webform* tab, click the *E-mails* button toward the top of the screen.



2. Select the *Component value* radio button.



3. Click *Add* to advance to the *Edit e-mail settings* page.
4. Click *Save e-mail settings* at the bottom of the page.

21.4. Creating a Confirmation Page

1. Within the *Webform* tab, click the *Form settings* button toward the top of the screen.
2. Populate the content of the confirmation screen in the WYSIWYG.
3. Click *Save configuration* at the bottom of the screen.

22. Glossary of Content Types

a. Banner – The banner is one of the most visible regions of your website; it appears above the top navigation menu across the entire minisite. The banner can consist of logos, slogans, and/or contact information. Only MSAs can add banners.

b. Block – A block is a region of space on the homepage of your minisite. By creating a block, you can highlight a specific paragraph, links, new information, events, videos, and more. Only MSAs can add custom blocks.

c. 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* block on the homepage, with older entries being accessible via the v*iew all* link.

d. Event – An event is an occasion that will take place on a specified date/time. You can create an event and it will populate on the Events Calendar, a block type that MSAs can feature on the homepage.

e. Footer Link – The footer region displays across the entire minisite. Popular links for the footer region include contact information pages, career information pages, *About Us* pages, and other entity minisites. Only MSAs can add footer links.

f. Link – Links lists highlight featured internal and/or external links within a homepage block of your minisite.

g. 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 *What's New* block on the homepage, with older entries being accessible via the v*iew all* link.

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

i. Slider Image(s) – Slider images are located directly below the top navigation on the minisite homepage. The slider image section allows you to highlight specific programs and information using graphics, and also add a customized look and feel to the website's design.

j. Social Links – These links help increase referral traffic from your minisite to your social media pages. If utilized, these icons display in the bottom right across the entire minisite.

k. Text Area – This content area can be added to your homepage in one of two ways:
   a. Welcome Text – This text area displays below the banner/slider image area and above the set of homepage blocks.

b. Featured Text – This text area allows for a highlighted text region that falls within a specified block on the homepage.

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

23. Security Best Practices

23.1. Physical Security

The system console should be located in a secure environment (locked room, cabinet, etc.) where only authorized personnel are allowed. 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 console logged in if you are away. Change your computer's settings to automatically lock after 5 minutes of non-use. Make a point to completely log out of any secure website and close the browser window every time you complete a job. Failure to close the browser window may result in the log-in session remaining open.

23.2. 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. Limit the number of services and applications you are running simultaneously. The more services running, the greater the risk of exposing the system to exploitation. Finally, remove any programs or applications not being used and defragment your hard drive on a regular basis to help your system's overall performance.

23.3. 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.