

Drupal Training Manual

Website Design & Development

July 6, 2018

IAM BFO (IAM NPF, IAM BTF, IAM401K)

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1 Introduction

Welcome! This guide describes how to get started using (as opposed to administrating) a Drupal-powered web-site and covers *basic topics* such as creating an account, logging in, navigating the Drupal admin, and creating/editing content.

Drupal is a *content management system*. Its goal is to help users compose and present web-site content such as items, photos, and other content types. Rather than forcing users to specify a fixed, pre-declared arrangement of content, Drupal takes care of the details of how information is arranged and presented, and lets users focus on the actual content to be displayed.

Most of the content on a Drupal-based site is stored in a database. Text and images are submitted by filling in forms via a web browser. When visitors view a page, Drupal gets the relevant bits of content from the database and composes all of the components of the page in a template. This makes it easy to quickly add or change content, without requiring knowledge of HTML or other web technologies on the part of the person providing the content.

Depending on the configuration of the Drupal site and the defined user-roles on the site, you may be allowed to contribute and edit content or administer various aspects of the site. Fortunately, Drupal is designed to make this relatively easy. Very little technical knowledge is assumed. Though details may vary with a site's configuration, the basic process involves these steps:

- *Create an account* on the site
- *Log in* by typing the user name and password you created in the account creation step (or that was sent to you by one of the site's administrators)
- *Create content*

This user guide will explain these steps and familiarize you with the basic information you need to use Drupal successfully.

For further documentation, see the online Drupal Handbooks.

2 Different Site Environments

Before explaining how to actually use Drupal, it is important to understand the different 'environments' that New Target has set up and uses as part of the development workflow. These 'environments' also provide a chance for IAM BFO staff to get used to making updates without having to do so on the 'live' site.

There are three main 'environments' in this flow. They are:

- *Development (dev)*: This 'environment' is the first step in the development workflow. It is where New Target will do their development work and first round of testing.
- *Staging (stage)*: This 'environment' is the second step in the workflow and a key one for IAM BFO staff. 'Stage' is where all testing should happen.
- *Production (prod)*: This 'environment' is the live site that is publicly accessible. It is the site that gets submitted to Google and other search engines and the site that is visited by the general public.

New Target has password protected access to all non-live 'environments' (dev and stage). This password will be sent out to site admins and is subject to change every so often..

Here's a little more information about the three environments:

- *IAM BFO*:
 - *Development Site*: <https://dev-iambfo.newtargetops.net>

- *Staging Site:* `https://stage-iambfo.newtarget.net`
- *Production Site:* `https://iambfo.org`

- *IAM NPF:*
 - *Development Site:* `https://dev-iamnpf.newtargetops.net`
 - *Staging Site:* `https://stage-iamnpf.newtarget.net`
 - *Production Site:* `https://iamnpf.org`

- *IAM BTF:*
 - *Development Site:* `https://dev-iambtf.newtargetops.net`
 - *Staging Site:* `https://stage-iambtf.newtarget.net`
 - *Production Site:* `https://iambtf.org`

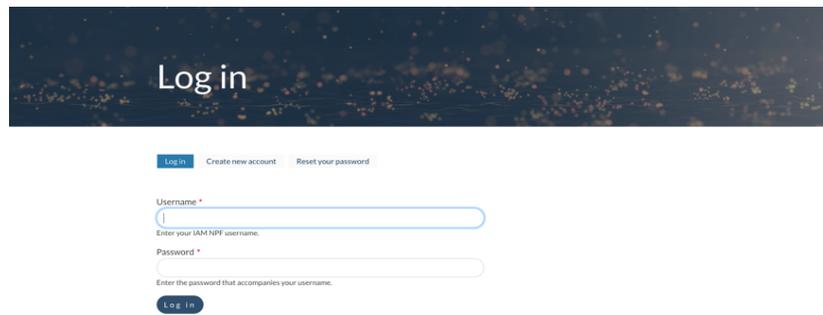
- *IAM 401K:*
 - *Development Site:* `https://dev-iam401k.newtargetops.net`
 - *Staging Site:* `https://stage-iam401k.newtarget.net`
 - *Production Site:* `https://iam401k.org`

3 Creating a Drupal Account and Logging In

To add or edit content on a Drupal site, you will first need a Drupal account for the site. In this case you will need to have your account set up on all 3 of the sites (they can all use the same username and password).

3.1 Logging In

1. You can access the “Log in” page by typing the url of the site you want to login to into the web browser and adding “/user” to the end.



Here is an example for the staging sites:

- <https://stage-iamnpf.newtarget.net/user>
- <https://stage-iambtf.newtarget.net/user>
- <https://stage-iam401k.newtarget.net/user>

2. Enter your Username and Password and select the “Log in” button under the form fields.

*NOTE - If you already have an account and need to reset your password you can do so by selecting the “Reset your password” tab above the form.

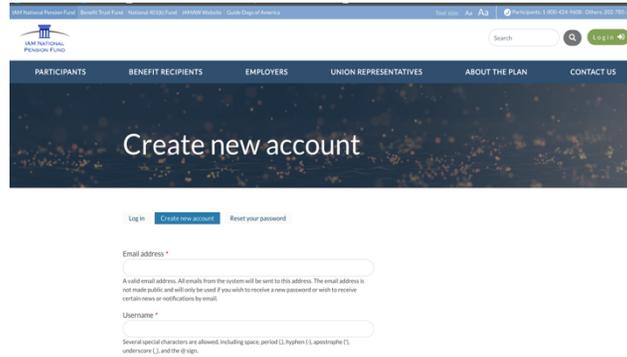
3.2 Creating an Account

If you need to create a new account you can reach out to the site administrators (Rob Davenport or Alex Knot) or create an account on the site.

Here are the instructions to create a new account through the site:

1. Navigate to the “Log in” page by typing the url of the site you want to login to into the web browser and adding “/user” to the end (Same as ‘Logging In’ step 1).

2. Select the "Create new account" tab above the log in form and fill out the new account form (you will get an automatically generated email letting you know your account is pending).

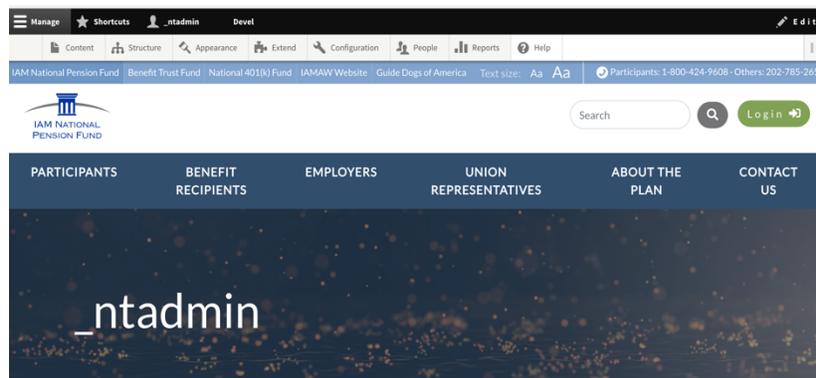


*NOTE - Filling out the 'Create new account' form adds your information to Drupal and requires a site administrator to approve your account.

3. Once your account has been approved you will get another email with directions to create a password and login to the site.

4 The Drupal Admin

Once you have logged in, a new page will load. This page includes a new menu section at the top of the page. This is the menu you use to start entering and editing content.



5 Content Overview and Content Types

This site mostly uses 'nodes' and 'blocks' to show most of the content on the site. Since most of the content on the site is created as a 'node' we will review how to find 'nodes' and only discuss 'blocks' when relevant to specific tasks.

All nodes are classified as a content type. Each content type has different fields and displays differently on the frontend of the site.

Here is a list of content types with a description about how they are used on the site.

5.1 Basic Page

This is the content type used for the majority of pages on the site. It allows the following fields to be edited:

- *Title:* This text field allows you to enter the page title that will be displayed on the frontend and that is searchable in the admin.
- *Body:* This text area allows you to enter the body content of the page. This allows html input as well as options similar to popular document creation software.
- *Section:* This dropdown determines where the page lives, what section of the site it is listed under.
- *Video:* If there is a video for the top of the page like there is on the How to apply you can add it here. This also allows you to add a "Video Background" image that will display so there is no pixilation.
- *Documents:* This document uploader allows you to add documents to the page outside of the body.

5.2 Employer

The content in this content type is automatically created with admins import new employers into the site. There is a separate document that discusses this process for the appropriate IAM BFO team.

5.3 Homepage Slider

This powers the items in the slider on the homepage. It allows the following fields to be edited:

- *Internal Title*: This text field allows you to enter an internal title that will not be displayed on the frontend of the site, but is searchable in the admin.
- *Headline*: This text field allows you to enter the headline that appears on the frontend of the site.
- *Subhead*: This text area allows you to enter the secondary copy that appears on the slider. This allows html input as well as options similar to popular document creation software.
- *Alignment*: This dropdown allows you to select the alignment of the text and the CTA of the slider item.
- *CTA*: This section powers the CTA and link for the slide.
 - *URL*: This reference field allows you to add references to any internal pages on the site, by starting to type in the page title and selecting the correct page from the options that appear.
 - *Link Text*: This text field allows you to enter the CTA text on the button for the slide.

5.4 Landing Page Infographic

This powers the infographics on the homepage. It allows the following fields to be edited:

- *Internal Title:* This text field allows you to enter an internal title that will not be displayed on the frontend of the site, but is searchable in the admin.
- *Headline:* This text field allows you to enter the headline that appears on the frontend of the site. This field allows full html.
- *Subhead:* This text area allows you to enter the secondary copy that appears on the slider. This allows html input as well as options similar to popular document creation software.
- *Icon:* This dropdown allows you to select the icon that displays behind the headline.

5.5 List Page

This powers list pages such as glossary of terms and the FAQ page. It allows the following fields to be edited:

- *Title:* This text field allows you to enter the page title that will be displayed on the frontend of the site and is searchable in the admin.
- *Body:* This text area allows you to enter copy that appears on the above the list. This allows html input as well as options similar to popular document creation software.
- *FAQs By Topic:* These Fields allow you to select add list content to the page.
 - *Topic:* This text field allows you to enter the 'Topic' of the list. This acts as a page subhead.
 - *Accordion:* These fields allow you to enter the information for each item in the list. These items are displayed on the frontend as accordions, meaning they can be collapsed or expanded.
 - *Title:* This text field allows you to enter a title for the accordion item.
 - *Description:* This text area allows you to enter copy that appears in the accordion. This allows html input

as well as options similar to popular document creation software.

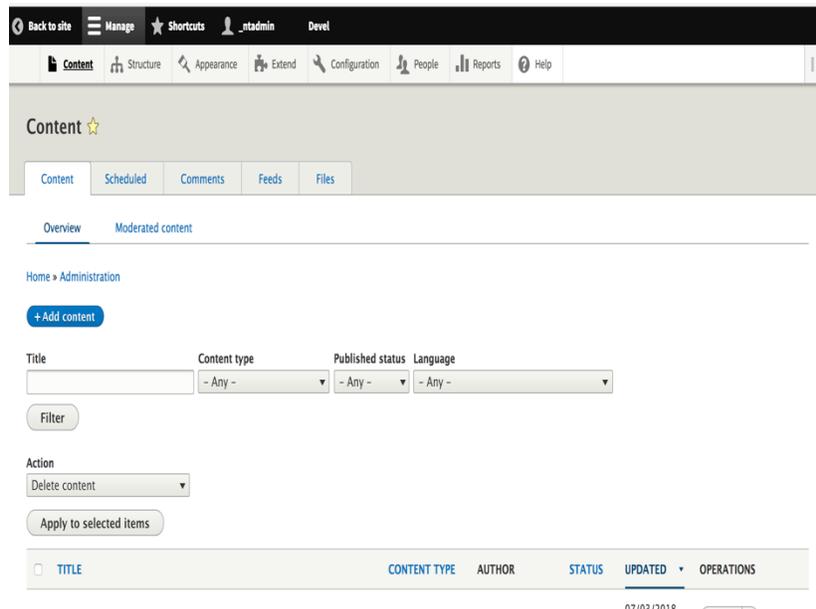
5.6 Suggested Search Result

This powers the suggested search results. It allows the following fields to be edited:

- *Title:* This text field allows you to enter a title that will not be displayed on the frontend of the site, but is searchable in the admin.
- *Headline:* This text field allows you to enter the headline that appears on the frontend of the site.
- *Description:* This text area allows you to enter the secondary copy that appears in the suggested result. This allows html input as well as options similar to popular document creation software.
- *Searchable Keywords:* This text area allows you to enter the keywords that determine if the suggested result appears. These keywords can be separated with a comma.
- *CTA Reference/Link:* These fields allows you to control the content that is being linked to as well as the copy that appears.
 - *URL:* This field allows internal pages to be referenced and external links to be added. See helper text about how to reference each.

6 Finding Content

1. Once you have logged in, select the "Content" item in the top white/gray Drupal menu. This will take you to a page that lists all of the different nodes.



Once you are on this page you can filter and search for 'nodes' (pieces of content) or you can also add new 'nodes' (pieces of content).

7 Editing Content

Before we talk about adding new content let's first review how to edit current content that is on the site.

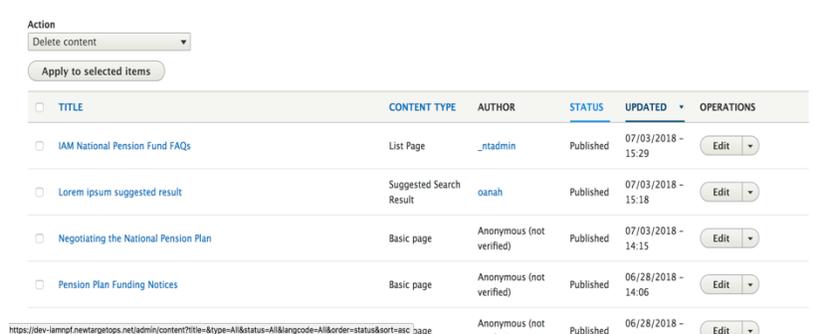
The site uses a publishing workflow. This workflow is composed of three roles:

- *Editor*: Can add/edit content.
- *Publisher*: Can publish content. These users get an alert when there has been an update made by an editor.
- *Administrator*: Can do everything from editing content to deleting and unpublishing content.

There are a few ways to edit content.

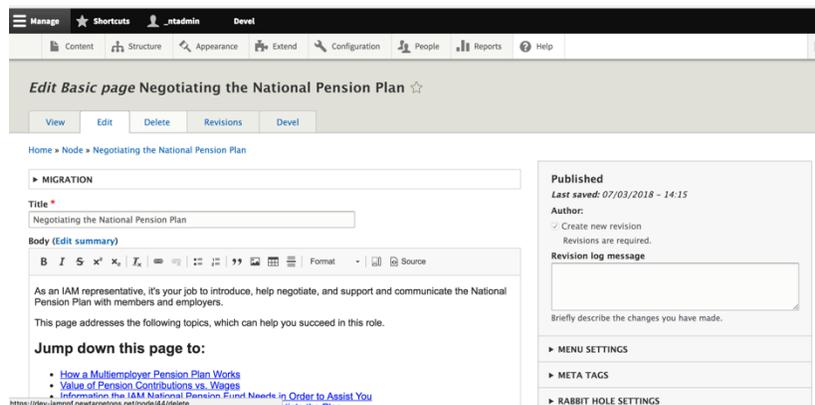
7.1 Editing From the Admin

1. When you are on the admin page that shows the list of content find the content item you want (by searching/filtering) to edit and select the "Edit" button on the right side of the screen. This will take you to the editor for the specific node.



TITLE	CONTENT TYPE	AUTHOR	STATUS	UPDATED	OPERATIONS
<input type="checkbox"/> IAM National Pension Fund FAQs	List Page	_ntadmin	Published	07/03/2018 - 15:29	<input type="button" value="Edit"/>
<input type="checkbox"/> Lorem ipsum suggested result	Suggested Search Result	oanah	Published	07/03/2018 - 15:18	<input type="button" value="Edit"/>
<input type="checkbox"/> Negotiating the National Pension Plan	Basic page	Anonymous (not verified)	Published	07/03/2018 - 14:15	<input type="button" value="Edit"/>
<input type="checkbox"/> Pension Plan Funding Notices	Basic page	Anonymous (not verified)	Published	06/28/2018 - 14:06	<input type="button" value="Edit"/>
		Anonymous (not verified)	Published	06/28/2018 - 14:06	<input type="button" value="Edit"/>

2. Once the new screen has opened you will be able to edit the content.



The screenshot shows the Drupal content editor interface. At the top, there's a navigation bar with 'Manage', 'Shortcuts', and 'Devel'. Below that, a breadcrumb trail reads 'Home > Node > Negotiating the National Pension Plan'. The main editing area includes a 'Title' field containing 'Negotiating the National Pension Plan' and a 'Body' field with a rich text editor. The body text reads: 'As an IAM representative, it's your job to introduce, help negotiate, and support and communicate the National Pension Plan with members and employers. This page addresses the following topics, which can help you succeed in this role. Jump down this page to: How a Multiemployer Pension Plan Works, Value of Pension Contributions vs. Wages, Information the IAM National Pension Fund Needs in Order to Assist You'. On the right side, there's a 'Published' status box showing 'Last saved: 07/03/2018 - 14:15' and 'Author: Anonymous'. Below that are sections for 'MENU SETTINGS', 'META TAGS', and 'RABBIT HOLE SETTINGS'.

*NOTE - Different 'content types' have different editable fields.

**NOTE - Copying and Pasting from Microsoft Word can cause some formatting problems as it pulls in all of the formatting from word. If you are going to copy and paste please use a plain text version.

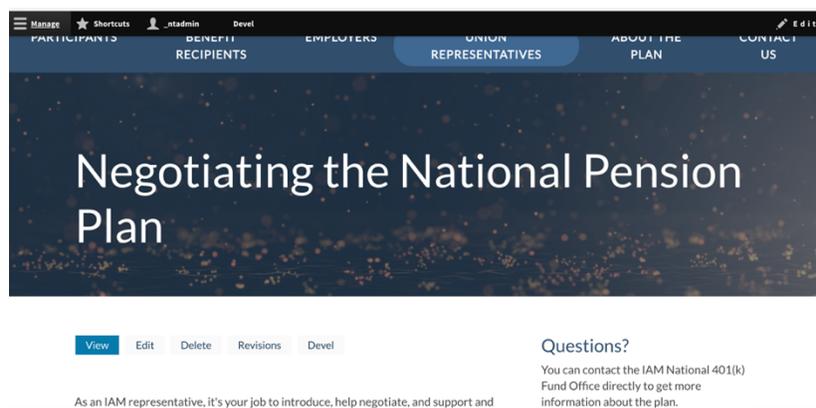
3. When you are finished editing you can select "Preview" to see a preview of the page or "Save" to save your changes.

*NOTE - If you are an Editor this will flag the node as changed for Publisher approval.

7.2 Editing From the Page

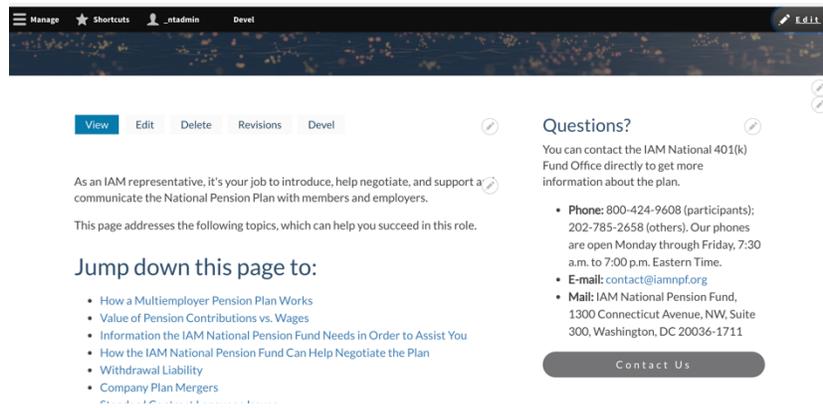
Another option to edit is by navigating to the page you want to edit as a logged in user.

1. When you are logged in navigate to the page you wish to edit.



*NOTE - You will know if you are logged in because you will see the top level Drupal menus at the top of your screen.

2. Select the "Edit" button from the top (black) menu. This button should be on the right side. This will add an 'edit' icon to all areas on the page that are editable.



3. Select the 'edit icon' and you will be taken to the admin page for that section.

*NOTE - This will allow you to edit different types of content, so if the page has blocks or views you will be able to easily access those here.

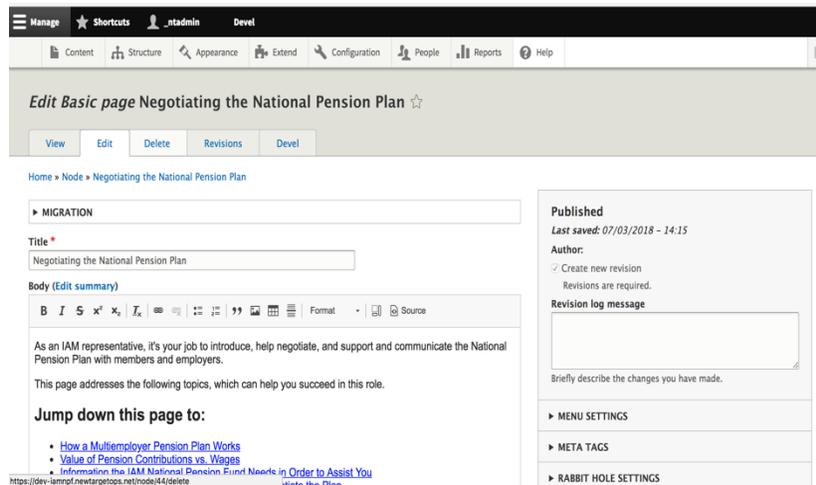
4. Make your edits on the screen and select "Save" (or "Preview" if you want to see a preview where applicable). Once you save this will take you back to the page.

7.3 Reverting Content

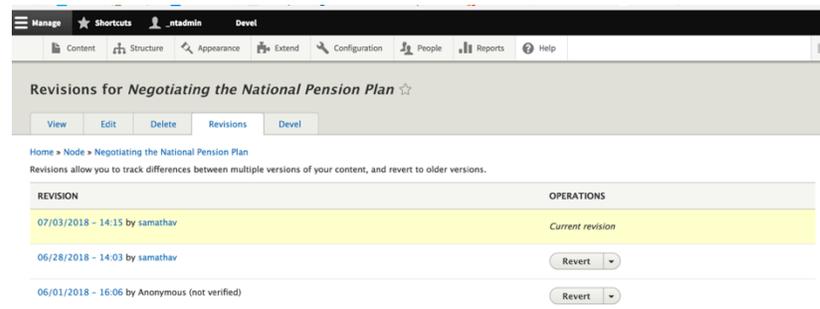
All nodes have "Revisions" turned on. This allows you to easily revert content back to a previous state if something has been mistakenly published.

You can see the 'revision history' for a specific node by:

1. Select the "Revisions" tab at the top of the node admin screen. This will load that tab which shows all of the previous revisions of the node.



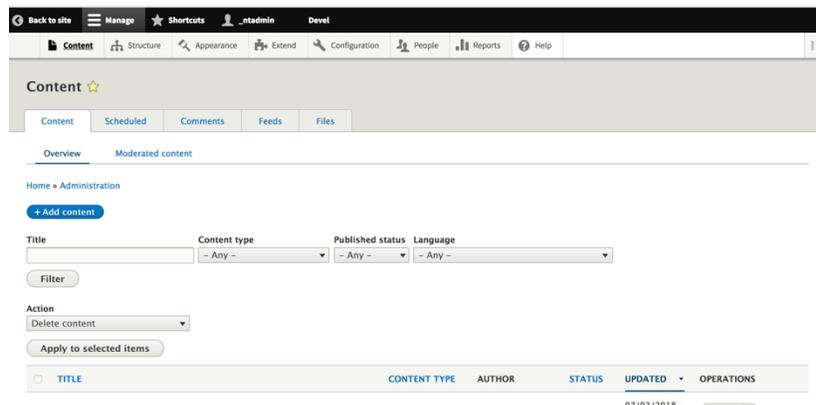
2. To revert content back to a previous version select the "Revert" button.



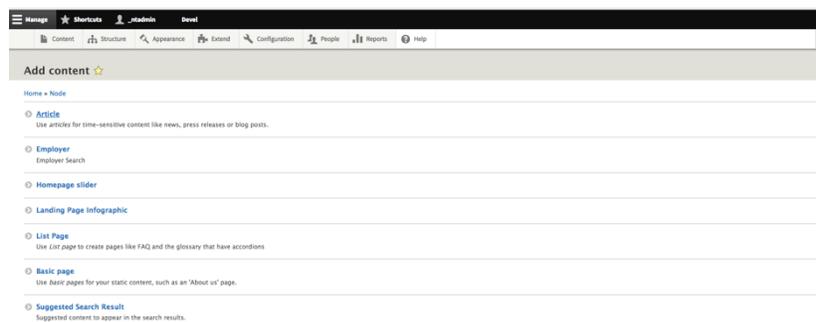
8 Adding New Content

New content can be added on the content list page by doing the following:

1. Select the "Add Content" button at the top of the page. This will take you to a new page



2. Select the content type you want to use to add the new content item.



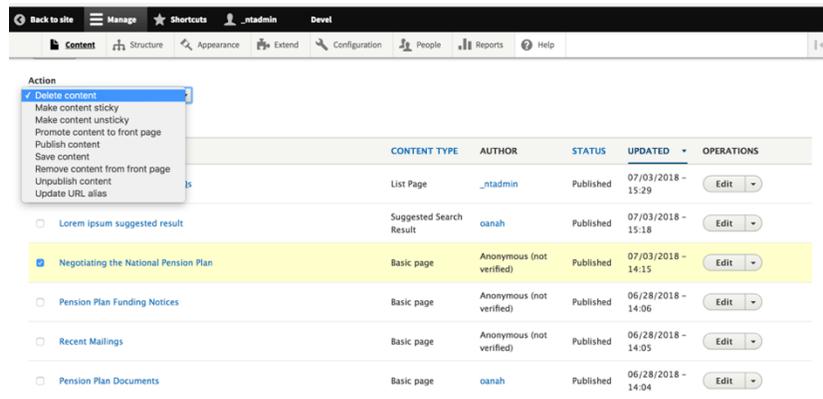
3. Enter the content that needs to be added.

*NOTE - A red asterisks means the field is required to be saved.

9 Unpublishing Content

New Target does not recommend deleting nodes, instead you should "Unpublish content that you no longer wish to have visible on the site. This can be done on the list of content page in the Drupal admin by doing the following:

1. Select the checkbox next to the node you wish to unpublish.



2. Above the list of content is a dropdown menu that is labeled "Action." This is where you can make bulk updates if needed. This is also how you can unpublish a specific node. Select the "Unpublish content" option in the dropdown.

3. Select the "Apply to selected items" button under the dropdown.

*NOTE - the page will refresh and you will see the "Status" of the node go from "Published" to "Unpublished."

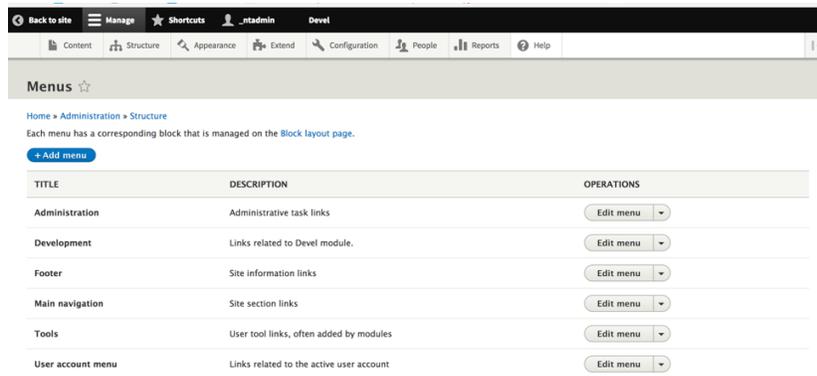
10 Editing Menus

The sites use TB Mega Menu to power the main navigation. There can be two sections for each top level menu item. The 'Menu Items' and the 'Explainer Block'

10.1 Editing Menu Items

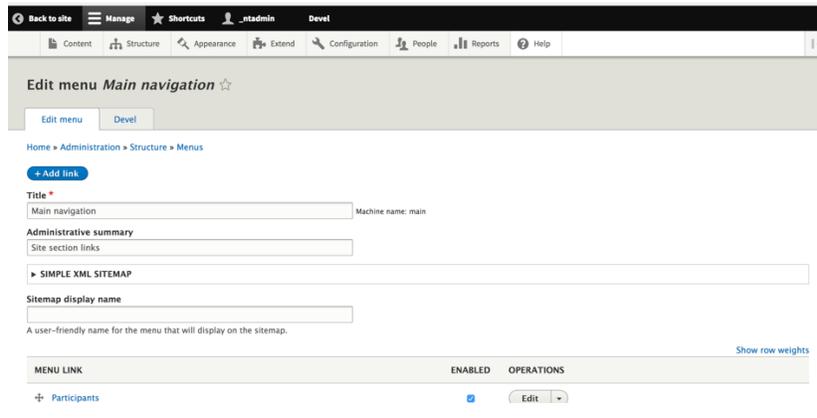
To edit the menu items in the main navigation do the following:

1. In the Drupal menu select "Structure" -> "Menu" which will take you to a new page that lists all of the menus used across the site.

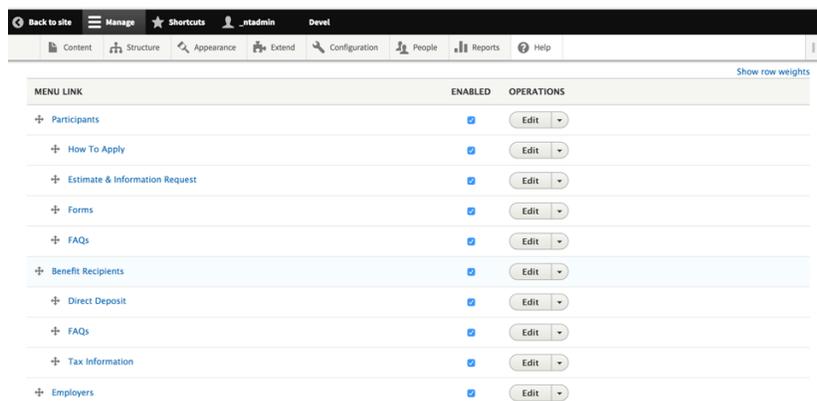


TITLE	DESCRIPTION	OPERATIONS
Administration	Administrative task links	Edit menu
Development	Links related to Devel module.	Edit menu
Footer	Site information links	Edit menu
Main navigation	Site section links	Edit menu
Tools	User tool links, often added by modules	Edit menu
User account menu	Links related to the active user account	Edit menu

2. Select the menu you want to edit (The sites uses the "Main Navigation" menu to power the main navigation). This will take you to a new page that lists the items within the navigation. On this page there is also an "Add link" button if you need to add new items. This will open a new page for each specific item.



MENU LINK	ENABLED	OPERATIONS
+ Participants	<input checked="" type="checkbox"/>	Edit



MENU LINK	ENABLED	OPERATIONS
+ Participants	<input checked="" type="checkbox"/>	Edit
+ How To Apply	<input checked="" type="checkbox"/>	Edit
+ Estimate & Information Request	<input checked="" type="checkbox"/>	Edit
+ Forms	<input checked="" type="checkbox"/>	Edit
+ FAQs	<input checked="" type="checkbox"/>	Edit
+ Benefit Recipients	<input checked="" type="checkbox"/>	Edit
+ Direct Deposit	<input checked="" type="checkbox"/>	Edit
+ FAQs	<input checked="" type="checkbox"/>	Edit
+ Tax Information	<input checked="" type="checkbox"/>	Edit
+ Employers	<input checked="" type="checkbox"/>	Edit

*NOTE - This page provides a few options for items in this menu:

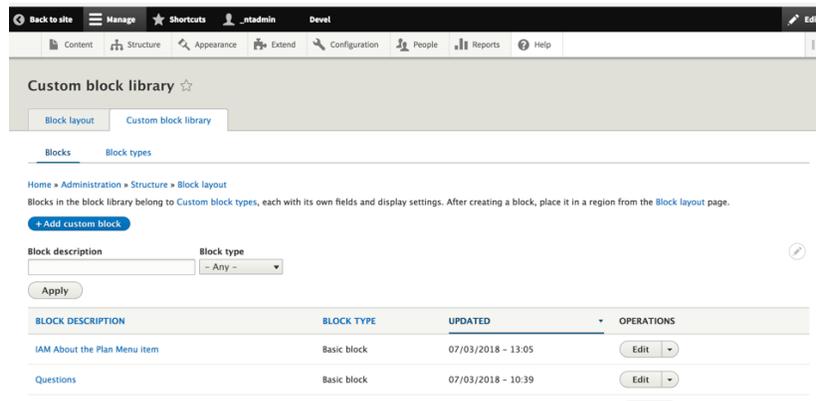
- a. To remove an item you can uncheck the "Enabled" checkbox and select the "Save" button at the bottom of the screen.
- b. To edit a link you can select the "Edit" button beside the menu item. This will take you to the page where you can edit the menu item (name, link, parent item). When you are finished with your changes select the "Save" button.
- c. To add an item select the "Add link" button. This will take you to a new page where you can add a new navigation item (To add a new item you need to provide the name, link and parent item). When you are finished select the "Save" button.
- d. To reorder menu items you can drag and drop them to where you'd like them to appear. When you are finished select the "Save" button at the bottom of the screen.

10.2 Editing Menu 'Explainer Blocks'

To help users understand the sections of the sites and where they should be and to provide IAM BFO more promotional space, New Target added 'Explainer blocks' of content to the navigation.

This content can be edited by:

1. In the Drupal menu select "Structure" -> "Block Layout" which will take you to a new page that lists the blocks used in different areas of the site. Select the "Custom block library" at the top of the page. This will load the new tab with a full list of custom blocks.

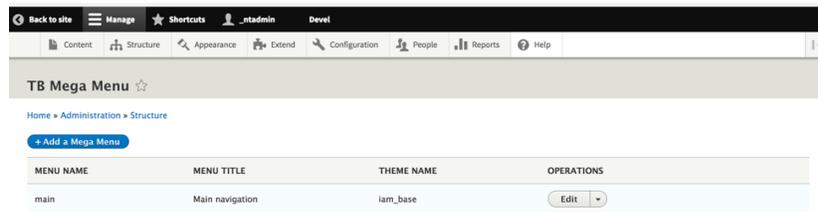


2. Here you can add new blocks or edit existing blocks.

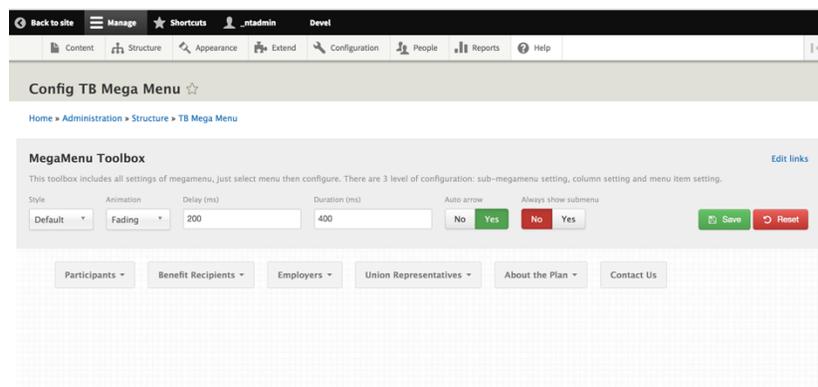
- a. To edit an existing block find the block in the list and select the "Edit" button. This will load a new page that has a CK Editor that you can alter the content in the block. When you have made your change select the "Save" button at the bottom and block is now updated.
- b. To add a new block select the "Add custom block" button at the top of the list. This will take you to a page where you can select the block type. Select "Basic block" and then you will be taken to a screen to enter a title (called Block Description) and a text area to input the content. When you are finish select the "Save" button at the bottom of the page.

*NOTE - We've Named the menu item blocks "[top level navigation item] Menu item" so that we can easily find them, you can use a different naming convention if there is something that is easier for you.

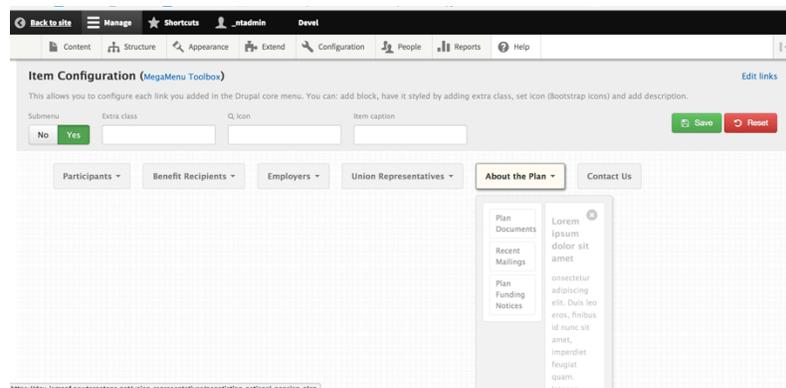
3. If you were just updating a block the content will now be updated. If you were adding a new block you need to now assign the block to the menu section. To do this go to "Structure" -> "TB Mega Menu" which will load a new page



4. Select the "Edit" button. This will take you to a page where you can edit the menu layout.



5. Select the top level menu you wish to edit and click the 'block' item (There will be a label at the bottom that says 'Block'). The contextual menu at the top of the page will change and show you a dropdown titled "Blocks" which is a list of all blocks that can be added to this area. Find the block you just added in the list.



6. Once you select this select the "Save" button on the right side of the screen.

11 Conclusion

All testing should be done on the Staging sites:

- <https://stage-iampnf.newtarget.net>
- <https://stage-iambfo.newtarget.net>
- <https://stage-iam401k.newtarget.net>

Any questions/issues that come up while you are testing or using the sites reach out the Joe Frye at New Target by email or phone (information below) or file a ticket in the ZoHo ticket system (link below):

- Joe Frye -
 - joef@newtarget.com
- ZoHo -
 - <https://projects.zoho.com/portal/newtarget-inc#bugsvview/734551000008491716/6>