

Drupal Basics Training Manual

Digital Strategy

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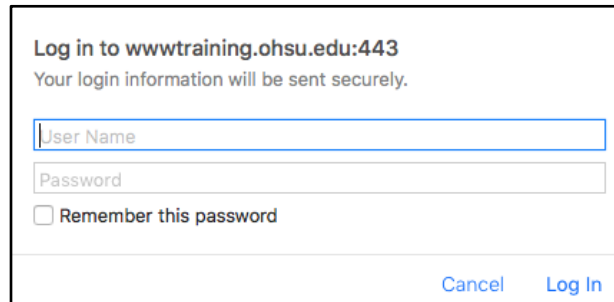
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Logging in

Navigate to the Drupal URL

Training: <https://wwwtraining.ohsu.edu/cms>

You will first be presented with a grayish login box. This box requires a special login and password combination that will be provided in class.

A gray login box with a black border. At the top, it says "Log in to wwwtraining.ohsu.edu:443" in bold, followed by "Your login information will be sent securely." Below this are two input fields: "User Name" and "Password". There is a checkbox labeled "Remember this password". At the bottom right, there are two buttons: "Cancel" and "Log In".

Log in to wwwtraining.ohsu.edu:443
Your login information will be sent securely.

User Name

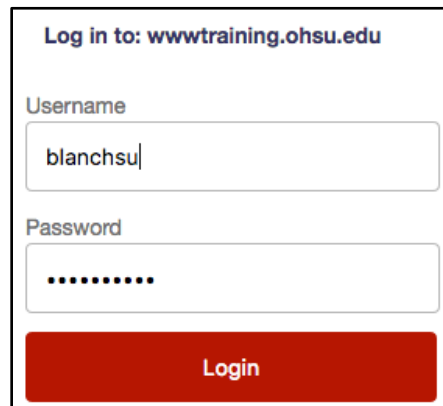
Password

☐ Remember this password

Cancel Log In

Special login screen

This will then take you to a login screen where you will enter your **OHSU credentials**.

A white login screen with a black border. At the top, it says "Log in to: wwwtraining.ohsu.edu". Below this are two input fields: "Username" with the text "blanchsu" and "Password" with masked characters ".....". At the bottom, there is a large red button labeled "Login".

Log in to: wwwtraining.ohsu.edu

Username

blanchsu

Password

.....

Login

Log in screen

User and group dashboard

The dashboard is a one-stop landing place for managing content. It lists your Group memberships and role(s) as well as providing information about Group content.

User dashboard

After logging in, click the User Dashboard Tab on the right-hand side of the page. You can also get to your user dashboard by clicking on **Shortcuts** on the top menu and then clicking the **User Dashboard** link.

The User Dashboard contains a listing of all Groups of which you are a member. It also contains a listing of all Group content. This includes all events and news articles created in any of the groups for which you are a member. You can edit all of your content and metadata from the User Dashboard. At the top are **Quicklinks**, where you can upload documents and images, create and edit Promos, and access help resources.

The screenshot displays the User Dashboard for Sue Blanchard fStack. The top navigation bar includes links for Manage, Shortcuts, and Sue Blanchard fStack, along with a subscription status indicator. The main content area is divided into three sections: User Dashboard Quicklinks, Group Memberships, and My Group(s) Content.

User Dashboard Quicklinks

- Documentation
- Create Support Ticket
- Blog
- Digital Identity Guidelines
- Add Files
- View All Files
- Create Promo
- View All Promos
- View All Events
- My Forms

Group Memberships

Group Name (Search): Group type:

My Group(s) Content

Title: Group Name: Moderation state: Content type:

TITLE	CONTENT TYPE	GROUP	MODERATION STATE	LAST CHANGED ON	LAST CHANGED BY		
News Sample	Basic Page	WSPR Training Content	Published	Fri, 11/22/2019 - 07:11	Sue Blanchard	Edit Content	Edit Metadata
Portland Gets A Big Flip In Its Commute	Article	WSPR Training Content	Published	Tue, 07/16/2019 - 10:50	Dedrick Sprick	Edit Content	Edit Metadata
Drupal Basics Training	Landing Page	Drupal Basics	Published	Tue, 09/17/2019 - 09:39	Sue Blanchard	Edit Content	Edit Metadata
WSPR Drupal Training Content	Landing Page	WSPR Training Content	Published	Tue, 09/17/2019 - 10:20	Sue Blanchard	Edit Content	Edit Metadata
Training Assets and Examples	Basic Page	WSPR Training Content	Published	Mon, 12/09/2019 - 13:45	Sue Blanchard fStack	Edit Content	Edit Metadata
Exercise Instructions	Basic Page	WSPR Training Content	Published	Fri, 11/22/2019 - 06:45	Sue Blanchard	Edit Content	Edit Metadata

My Group(s) Events

Title: Group Name: Start Date: End Date: Event Tag(s):

EVENT TITLE	START DATE	END DATE	GROUP	LAST CHANGED ON	LAST CHANGED BY	MODERATION STATE		
Drupal Basics Training	Sat, 03/10/2018 - 09:00	Tue, 03/10/2020 - 13:00	WSPR Training Content	Thu, 11/21/2019 - 06:14	Sue Blanchard	Published	Edit Content	Edit Metadata
Drupal Basics Training	Tue, 05/14/2019 - 09:00	Tue, 05/14/2019 - 13:00	WSPR Training Content	Thu, 08/08/2019 - 13:02	Sue Blanchard	Published	Edit Content	Edit Metadata

User dashboard

Group dashboard

Clicking on a **Group Title** in the **User Dashboard** will take you to that title's **Group dashboard**. Here you will see all content for that specific Group, their moderation state, as well as a list of Group members. You can also create additional Group content and edit the Group menu/navigation here as well as seeing the group members. You can also see any Events or News Articles created by members of that group.

The screenshot displays the 'Group Dashboard' for the 'Sue Blanchard fStack' group. The interface includes a top navigation bar with links like 'Manage', 'Shortcuts', and 'User dashboard'. The main content area is divided into several sections:

- Group Quicklinks:** Buttons for 'Create content in group', 'Edit group', and 'Edit group menu'.
- Group Members:** A table listing group members with columns for Name, Join Date, Group Role(s), and Last Access.
- Group Content:** A section with filters for Title Search, Moderation state, and Content type, followed by a table of content items.
- Group Events:** A section with filters for Title Search, Moderation state, Start Date, End Date, and Event Tag(s), followed by a message indicating no events are currently present.
- Group Articles:** A section with filters for Title Search and Moderation state, followed by a message indicating no articles are currently present.

NAME	JOIN DATE	GROUP ROLE(S)	LAST ACCESS
Ashley Uchtman	2019-12-04	Senior Editor	Tue, 12/10/2019 - 11:54
Bethany Lang	2019-12-04	Senior Editor	Tue, 12/10/2019 - 12:03
Caitlyn Martin	2019-12-04	Senior Editor	Tue, 12/10/2019 - 11:55
Christopher Carr	2019-12-04	Senior Editor	Tue, 12/10/2019 - 11:50
Kara Skaflestad	2019-12-04	Senior Editor	Tue, 12/10/2019 - 11:52
Liz Layman	2019-12-04	Senior Editor	Tue, 12/10/2019 - 11:47
Nikki Katz	2019-12-04	Admin	Mon, 12/02/2019 - 15:50
Ryan Schmidt	2019-12-04	Senior Editor	Tue, 10/08/2019 - 11:49
Sophia Nguyen	2019-12-10	Senior Editor	Tue, 12/10/2019 - 11:51
Sue Blanchard	2019-07-08	Admin	Wed, 12/18/2019 - 13:22
Sue Blanchard fStack	2019-07-08	Senior Editor	Wed, 12/18/2019 - 13:40
Vicki Castleman	2019-12-06	Senior Editor	Tue, 12/10/2019 - 12:12

TITLE	CONTENT TYPE	MODERATION STATE	LAST UPDATED	CREATED ON	AUTHORED BY	LAST EDITED BY
Drupal Basics Training	Landing Page	Published	Tue, 09/17/2019 - 09:39	Mon, 07/08/2019 - 13:59	Sue Blanchard	Dedrick Sprick

Group dashboard

NOTE: Due to the complex nature of Landing pages, The Group Dashboard is the best place from which you should make content changes to the landing page. Simply locate the landing page in the group dashboard and click the **Edit content** link on the right.

Required Practice exercise instructions

Practice exercise instructions and assets can be found at <https://wwwtraining.ohsu.edu/exercise>. A link to an example of a finished practice assignment can be found at the end of the instructions.

Assignment 1: Create a promotion (promo)

1. From your **User dashboard**, click the **Create Promo quicklink**
2. Include your **first name** in **title** of the promo.
3. Promo can be either the **image or button type**.
4. **Call to action** is something you want them to do. (Ex. **Learn more, Read more, Donate now**)
5. **Link to any page in Drupal** including your own page.
6. **Save** the Promo.

Assignment 2: Create and edit a basic page

1. From your **Group dashboard**, click the **Create content in group** button and click **basic page** to create a new basic page.
2. **Title:** Include **your first name** and **'practice basic'**
3. Add a **two column layout 55/45** element.
4. In the **LEFT column**, add a **TEXT** element. Add a paragraph of text followed by 5 lines of link text to that element. The heading should be called **Links** at **Heading 2** size.
5. In the **LEFT column**, create links for the 5 lines of link text you just added in the text element added in #4. (Links should be an **email link, Link to another Drupal page, link to a document, Link to an external website, Link to an authenticated site**)
6. Save the page as **Draft** status and complete the Metadata portion.
7. Click on the **Edit Content** tab.
8. Click **the pencil icon** (or **edit all**) to make the elements available for editing.
9. In the **LEFT column**, add a **HEADING** Element with a heading called **Embedded Video** at **Heading 3** size
10. In the **LEFT column**, under the **Embedded Video** heading, add a **VIDEO** Element to the left column under its heading and add a video link to the element to embed it on the page.
11. In the **RIGHT column**, add a **HEADING** Element with a heading called **Promo** at **Heading 2** size.
12. In the **RIGHT column**, under the **Promo** heading, add a **PROMO** element and add the **PROMO** you created in Exercise 1.
13. In the **RIGHT column**, add a **HEADING** Element with a heading called **Building Information** at **Heading 3** size
14. In the **RIGHT column**, under the **Building Information** heading, add a **BUILDING INFORMATION** element. Use any OHSU building and check any boxes in the element for information you want displayed.
15. Save the Page as **Needs Review** status
16. Review your page and if everything looks good, save the page as **Published** status.
17. Compare your page to the [completed basic page](#).

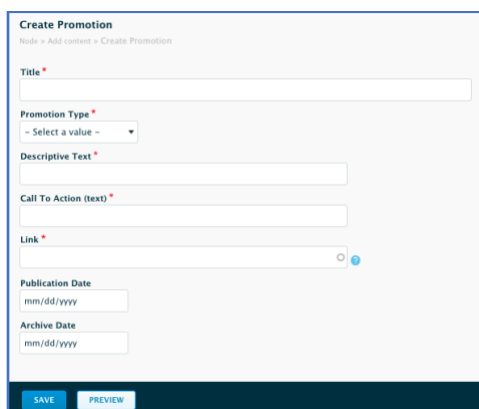
Practice exercise content types

Promotions

Promotions or promos are reusable pieces of content that promote an event or program. The Promo content type first must be created, and later the Promo is added to a page as an element. Standard promos are of two types: they can either have an image included or a button, both linking to a page with more information about the promotion.

Create a promotion

1. Go to your User Dashboard
2. Click **Create Promo** under **User Dashboard Quicklinks**
3. Add a **Title**.
4. **Promotion Type** - Use the drop-down arrow to select either **Promotion with Image** or **Promotion with Button**
5. If Promo contains an image, Click **Select Image(s)**.
 - a. If the image already exists in Drupal
 - i. Verify that **Library** tab is selected and click the desired image to select it
 - ii. Click the **Select** button.
 - b. If the image does not yet exist in Drupal
 - i. Click **Upload** tab
 - ii. Click **Choose file** to find the image that will need to be uploaded.
 - iii. Select the image to be used then click **Open**.
 - iv. Add **Alternative Text** for the image being uploaded.
 - v. Perform any necessary cropping to any new images being uploaded
 - vi. Add a **Name** for any new image being uploaded
 - vii. Click the **Select** button
6. Add **Alternative Text** metadata
7. Add your short Promo message in the **Descriptive Text** field.
8. Add link text in the **Call To Action (text)** text field (Learn more, Read more, etc)
9. Add **Link** for the promo
10. Click **Save**



The screenshot shows the 'Create Promotion' form. It has a breadcrumb trail at the top: 'Node > Add content > Create Promotion'. The form fields are: 'Title' (text input), 'Promotion Type' (dropdown menu with '- Select a value -'), 'Descriptive Text' (text input), 'Call To Action (text)' (text input), 'Link' (text input with a help icon), 'Publication Date' (text input with 'mm/dd/yyyy' placeholder), and 'Archive Date' (text input with 'mm/dd/yyyy' placeholder). At the bottom are 'SAVE' and 'PREVIEW' buttons.

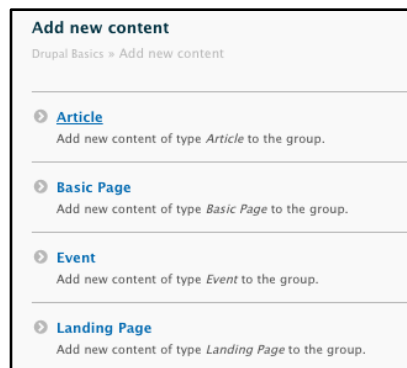
Create a promotion

Edit a promotion

1. Go to your User Dashboard
2. Click on **View All Promos** under **User Dashboard Quicklinks**
3. Locate the promo to be edited. You can type and select your name in the Authored By filter field if it is your promo, or you can type and select the name of the promo using the Title contains field. The title should match the heading of the promo.
4. Click on the title of the Promo
5. Click **Edit**
6. Make any changes to the promotion
7. Click **Save**.
8. You may need to re-publish ant pages using the changed promo.

Create a basic page

1. Go to the User Dashboard
2. Under **Group Title** Click on **Drupal Basics**
3. Click **Create Content in group** button from the **Group Quicklinks**
4. Click **Basic Page** (content type)



Add new content
Drupal Basics » Add new content

[Article](#)
Add new content of type *Article* to the group.

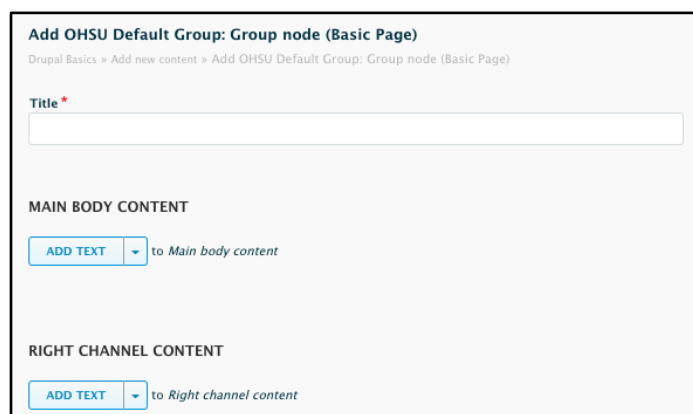
[Basic Page](#)
Add new content of type *Basic Page* to the group.

[Event](#)
Add new content of type *Event* to the group.

[Landing Page](#)
Add new content of type *Landing Page* to the group.

Create group content

5. Add a page **title**



Add OHSU Default Group: Group node (Basic Page)
Drupal Basics » Add new content » Add OHSU Default Group: Group node (Basic Page)

Title *

MAIN BODY CONTENT
[ADD TEXT](#) to Main body content

RIGHT CHANNEL CONTENT
[ADD TEXT](#) to Right channel content

Add title when creating basic page

Steps 6-11 and 14-30 that follow are specific to our Hands-on walk-thru exercise in class and will vary with the content on each page you create. Steps 12-13 apply for any new basic page the first time you save the page. After you have added all of your content, the next steps in creating a page will start with Step 31.

6. Under **Main Body Content** click on **ADD TEXT**
7. Add text in the Text Element **Copy** area. Leave the Optional Heading field empty. (**NOTE:** You may copy directly from MS Word into Drupal).

Text element

8. Under the text block added above, click the drop-down arrow next to **Add Text to Main body content**, and select **ADD LAYOUT – TWO COLUMN, 55/45**

2-column layout

ADD TEXT	ADD TEXT WITH IMAGE	ADD IMAGE	ADD HEADING
ADD ACCORDION	ADD ALERT	ADD ARTICLE LIST	ADD BLOCK STYLE
ADD BUILDING INFORMATION	ADD BUTTON	ADD DROPDOWN LINKS	ADD EVENT CALENDAR
ADD EVENT LIST	ADD FACEBOOK PAGE	ADD FACEBOOK POST	ADD HEADING, BUTTON AND LINK
ADD INSTAGRAM	ADD LATEST TWEET	ADD LAYOUT – TWO COLUMN, 55/45	ADD LAYOUT – TWO COLUMN, 70/30
ADD LAYOUT – THREE COLUMN, 33/33/33	ADD MAKE A GIFT PROMO	ADD MULTIBUTTON ELEMENT	ADD OHSU BLOG FEED
ADD OHSU NEWS FEED	ADD PROFILE LIST	ADD PROFILES FOR CLINICS	ADD PROFILES FOR ORGANIZATIONS
ADD PROMOTION	ADD QUOTATION	ADD SOCIAL MEDIA LINKS	ADD TABLE DATA
ADD TABS	ADD TWEET	ADD TWITTER FOLLOW	ADD VIDEO
ADD FIND-A-DOC FORM			

Elements that can be added to main content area

9. In the left column
 - a. Under **Left Column Content**, click **ADD TEXT**
 - b. Add a heading in the Text element called **Versatile text element** and verify the **Level** is set to **Heading 2**
 - c. Add 3 paragraphs or text and 5 lines of link text content in the **Copy** section of the text element
10. Set **Save As** to **Draft**
11. Click **Save**
12. Click the arrow next to **Menu Settings** and check the box next to **Provide a menu link** since we want the page to show in the menu.
 - a. Add a **Menu link title** that will show in the menu (navigation).
 - b. Add a **Description** (This is not the metadata description. This is what will show when someone hovers over the menu item).
13. Under **Metatags**
 - a. Leave the **Page Title** unless there is a reason to change it
 - b. Add a 1 or 2-sentence **Description** of the content on your page (this is the metadata description and must have a minimum of 50 characters).
 - c. Add **Keywords** and preferably key phrases, separated by commas.

The screenshot shows the 'Add new content' form for 'Drupal Basics'. The 'Menu Settings' section is expanded, showing the 'Provide a menu link' checkbox checked. Below it are fields for 'Menu link title' and 'Description'. The 'Metatags' section is also expanded, showing 'BASIC TAGS' with fields for 'Page title', 'Description', and 'Keywords'. The 'Page title' field contains '[current-page-title] | OHSU'. The 'Description' field is empty. The 'Keywords' field is empty. Below 'BASIC TAGS' is the 'ADVANCED' section, which is currently collapsed. At the bottom of the form are two buttons: 'ADD NEW CONTENT TO DRUPAL BASICS' and 'BACK'.

Metadata fields

14. Click the Blue **Add New Content to Drupal Basics** button (Drupal Basics will change depending on the name of the group)
15. Now that you have saved the initial page, click the **Edit Content** tab to add additional content to your page.

16. Click the **Edit all** button to open up all of the elements for editing
17. In the right column
 - a. Under **Right Column Content**, click **ADD HEADING**
 - b. Add a heading called **What content should I use?** and verify the **Level** is set to **Heading 2**
 - c. Use the drop-down arrow next to **ADD TEXT to Right Column content** and click **ADD VIDEO**
 - d. In the Video element under **Video URL**, add the URL of a video to embed on page
18. In the right column
 - a. Under **Right Column Content**, click the drop-down arrow next to **ADD TEXT to Right Column Content** and click **ADD HEADING**
 - b. Add heading called **Images are added outside the text editor** and set the level to **Heading 3**
 - c. Use the drop-down arrow next to **ADD TEXT to Right Column Content** and click **ADD IMAGE**
 - d. In the Image element, click the **Select an Image** button
 - e. Click the **Upload** tab
 - f. Click the **Choose file** button
 - g. Locate the image you will be updating into Drupal, select it, then click **Open** (or **select**, or other options depending on browser)
 - h. Add a **Name** for your image
 - i. Add **Alternative text** for your image
 - j. Click the **Place Image** button
 - k. Add **Image caption**
19. Click **Save**
20. Upload a document into Drupal following the instructions for **Adding a document** below
21. Click the **Edit Content** tab to add links to your page.
22. Click the **Edit all** button to open up all of the elements for editing
23. In the left text element
 - a. Find the list that will become links
 - b. Create an Email link (should have link style icon)
 - c. Create a link to a Drupal page
 - d. Create a link to a document (should have link style icon)
 - e. Create a link to an External website
 - f. Create a link to an OHSU building
 - g. Create an Authenticated link (should have link style icon)
24. Set **Save As** to **Needs Review**
25. Click **Save**. Note the new color on your page. (blue)
26. Review the page. Note that bullets are missing from links.
27. Change page workflow to Needs editing. Note the new color on your page. (yellow)
28. Click the **Edit Content** tab to add bullets to the links on your page.

29. Click the **Edit all** button to open up all of the elements for editing
30. Highlight all of the links and click the bullet icon
31. Set **Save As** to **Needs Review**
32. Click **Save**. Note the color change on your page. (blue)
33. Review the content on your page
 - a. If there are any issues, change workflow to **Needs editing**. Make any needed changes then change the workflow back to **Needs review**.
 - b. If there are no issues, change the page workflow to **Published**. Be sure to click **Apply** if changing from the page itself. Published pages should have no color on them.

Delete a basic page

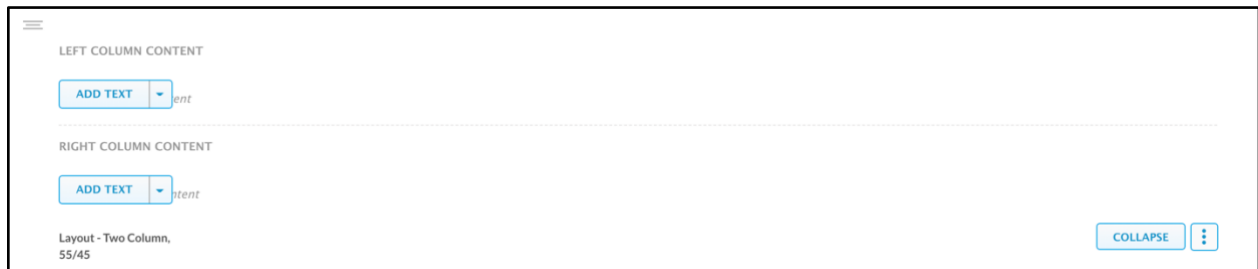
1. Locate the page to be deleted
2. Click **Edit Content** to make content changes
3. Click the **Delete** tab
4. On the confirmation page click **Delete** again

NOTE: Only Editors and Senior Editors will be able to delete published pages.

Elements

Add 2-column layout

1. Go to your User or Group Dashboard
2. Locate the page where you will be adding the 2-Column Layout
3. Click the Drop-down arrow next to **ADD TEXT BLOCK** and select one of the 2-column layout options, depending on whether you want near equal column widths (**ADD LAYOUT – TWO COLUMN, 55/45** or a narrower right column.)
4. Add elements and content as needed to each column



2-column layout page section

Add heading element to a page

1. Click the drop-down arrow next to **ADD TEXT** and select **ADD HEADING**
2. Add the heading to the **HEADING** text box
3. Under **SIZE**, use the drop-down arrow to select the size of the heading
4. If necessary, drag the heading to its correct location by clicking the mouse on the lines to the left and dragging it to the correct location.
5. Click **Save**.

Add promotion element to a page

1. Go to the user or Group Dashboard
2. Locate the page where you will be adding the Promo
3. Click **Edit Content**
4. Click the Drop-down arrow next to **ADD TEXT BLOCK** and select **ADD PROMOTION**
5. In the **Select a Promotion** text box, start typing the name of the promo to be added to the page.
6. When the name of the Promo appears, click on it
7. Click **Save**.

Add text element

1. From User or Group dashboard, locate the page where you will be adding the text element
2. Click **Edit content**
3. Find the section where you will be adding the element
4. Click the **ADD TEXT** on the element button
5. Add heading to heading field and use the drop-down to choose heading level (optional)
6. Add content to the **Copy** field
7. Click **Save**.

Add Video Element

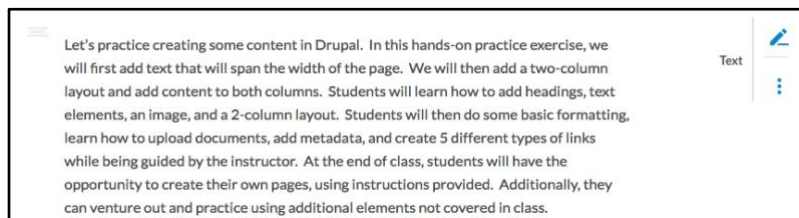
1. From User or Group dashboard, locate the page where you will be adding the Video element
2. Click **Edit content**
3. Find the section where you will be adding the element
4. Click the drop-down arrow next to **ADD TEXT** and select **ADD VIDEO**
5. Paste the URL of the video into the **Video URL** field. Do not use the Share or Embed video links they offer.
6. Type or paste a caption into the **Video Caption** field, if desired
7. Click **Save**

Delete element from a page

1. Locate the page where you will be deleting the element
2. Click **Edit content**
3. Go to the right of the element you will be deleting
4. Click on the ellipses
5. Click **Remove (There is no warning and No Undo)**
6. Save and Publish the page

Edit text element

1. Go to your User or Group Dashboard
2. Locate the page whose text element will be edited
3. Click **Edit content**
4. Locate the specific Text element on the page that you will be editing
5. Click the pencil icon or **Edit All** to reveal the text block
6. Make any changes necessary
7. Click **Save**



Pencil icon for editing



Edit all

Images

Add an image element to a Drupal page

1. From the User or Group dashboard, locate the page whose text element will be edited
2. Click Edit content
3. Click the drop-down arrow next to ADD TEXT and select **ADD IMAGE** to add the image element
4. Click **Select an Image**

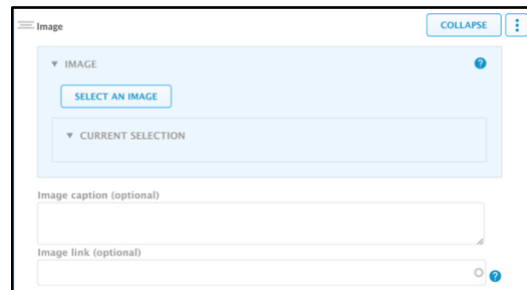
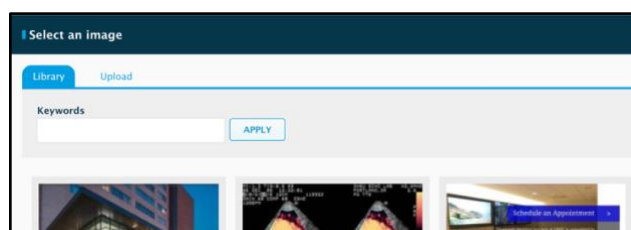


Image element

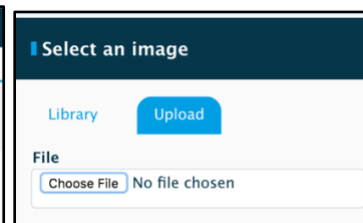
- a) If an image has already been uploaded in Drupal, click the **Library** tab
 1. Locate the image you will be adding to the page. Click the LOAD MORE button at the bottom of the page until you find your image.
 2. Click on the image to select it
 3. Click the **Place Image** button

OR

- b) If you will be uploading an image, click the **Upload** tab
 1. Click the **Choose file** button
 2. Locate the image you will be uploading
 3. Click on the image name
 4. Click **Open** (or other option depending on browser)
 5. Crop image if necessary
 6. Add a **Name** and **Alternative Text** for the image
 7. Click the **Place Image** button



Library image gallery



Upload images

Documents

Adding a document

1. Go to your User Dashboard
2. Click **Files**



The 'Add media' dialog box has a title 'Add media' and a subtitle 'Add media'. It contains two sections: 'Document' and 'Image'. The 'Document' section is selected and shows a description: 'A locally hosted document. Allowed file types txt, pdf, doc, docx, zip, xlsx, ppt, pptx, mp3, mp4, xls'. The 'Image' section shows a description: 'Locally hosted images.'

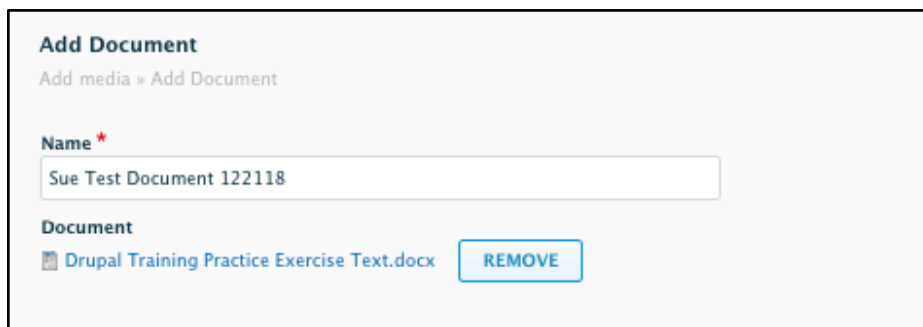
Add media (document)

3. Click **Document**
4. Click **Choose File**
5. Navigate to the location on your computer where the document is located and click it to select it
6. Click **Open** (may vary depending on your browser)
7. In the **Name** field, provide a Name for the document which will be used to find the document
8. Click **Save**



The 'Add Document' form has a title 'Add Document' and a subtitle 'Add media » Add Document'. It contains a 'Name' field with a red asterisk, a 'Document' section with a 'Choose File' button and a 'No file chosen' text, and a help icon.

Add document interface



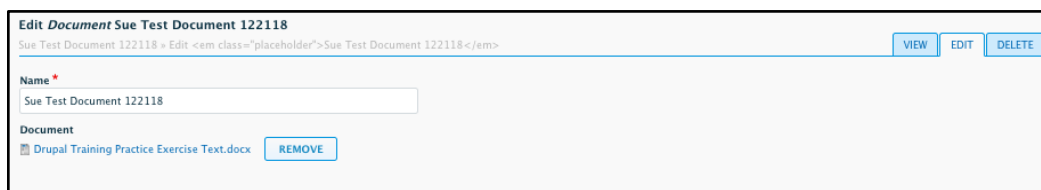
The 'Add Document' form has a title 'Add Document' and a subtitle 'Add media » Add Document'. It contains a 'Name' field with a red asterisk, a 'Document' section with a file icon, the filename 'Drupal Training Practice Exercise Text.docx', and a 'REMOVE' button.

Add a document interface completed

Editing a document

You will not be making edits to the document itself, just to things like the name, possibly replacing it, etc.

1. Go to your User Dashboard
2. Click on **View All Files**
3. Click on the **Media** Tab
4. Locate the document you will be editing
5. To the far right under **Operations**, click **Edit**
6. Make any changes to the document including changing the name or replacing the document if necessary. To Replace the document, Click **Remove** to remove the old document, then click **Choose File**, select the new document that will be the replacement, click **open**, then click **Save**.



The screenshot shows the 'Edit Document' window for 'Sue Test Document 122118'. At the top, there are tabs for 'VIEW', 'EDIT', and 'DELETE'. Below the tabs, there is a 'Name' field with a red asterisk, containing the text 'Sue Test Document 122118'. Below the name field, there is a 'Document' section with a small document icon and the text 'Drupal Training Practice Exercise Text.docx'. To the right of this text is a 'REMOVE' button.

Edit document interface including option to remove and replace documents

Deleting a document

1. Go to your User Dashboard
2. Click on **View All Files**
3. Click the **Media** Tab
4. Locate the document you will be deleting
5. Click the drop-down arrow to the right of that document under **Operations** and next to the word **EDIT**
6. Click **Delete**
7. Click **Delete** again to confirm the deletion

NOTE 1: If you removed the document while editing the document and replaced it, you will not find the document as an option to delete. You can also delete the document from the Edit option above. Once in the **Edit Document** window, click the **Delete** tab.

NOTE 2: There currently is no way to immediately delete a document. However, you can ensure that a document is deleted within a week if you follow these steps.

- a. Remove all links to the document from any pages
- b. One logged in, click on **Shortcuts** in the top menu of Drupal
- c. Click on **View all Files**
- d. Find the document you want to delete listed among all media
- e. In Grid view, check the box in the upper right corner of that document
- f. Verify or select **Delete Media** under **Action** in the upper left of the page
- g. Click the button **Apply to Selected Items**

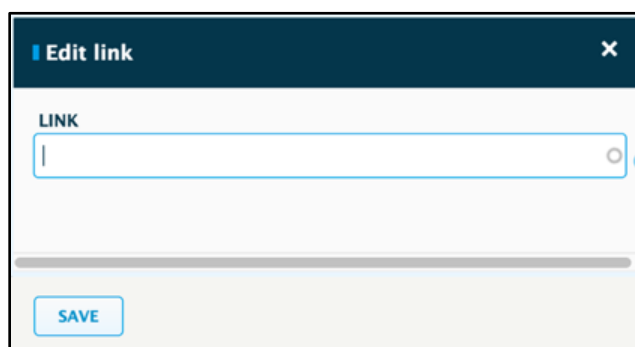
Links

Creating links in a text element follow a same general set of steps with a few differences based on the type of link being created. Link styles are usually automatically detected so content authors won't have to worry about adding them. There currently is one exception, the authenticated link style which may, at times, need to be updated manually.

Link to another Drupal page

There are 2 options for this type of link, depending on whether you are linking to a page that exists within the same group as the link, or linking to a page that is in a different Drupal group.

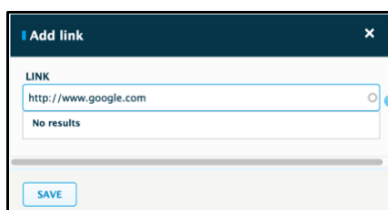
1. Go to your User or Group Dashboard
2. Locate the page containing the text block where you will be creating the link.
3. Click **Edit content**
4. Locate the text element where you will be creating the link
5. Create and highlight the link text in the text block that you will be linking
6. Click the link icon
7. If the page you are linking to is in your own group
 - a. Begin typing the name of the Drupal page you will be linking to. When the name of the page you are seeking displays under **Group content**, click on it to select it
 - b. Click **Save**. There is no link style for this type of link.
8. If the page you are linking to is in another Drupal group
 - a. You must know the URL of the page you are linking to, preferably having it open in another browser tab
 - b. Copy the path to that URL, starting from the slash (/) everything after the www.ohsu.edu
 - c. Paste the path into the **Link** text area
 - d. Click **Save**. There is no link style for this type of link.

The image shows a modal window titled "Edit link" with a dark blue header bar containing a close button (X). The main area is light gray and contains a label "LINK" above a text input field. Below the input field is a horizontal separator line. At the bottom left of the modal is a blue button labeled "SAVE".

Add and edit link interface

Link to an external website

1. Go to your User or Group Dashboard
2. Locate the page containing the text block where you will be creating the link.
3. Click **Edit content**
4. Locate the text element where you will be creating the link
5. Create and highlight the text in the text block that you will be linking
6. Click the link icon
7. Type the full URL (including the https:// portion) of the external website to which you will be linking
8. Click **Save**. There is no longer a link style for this type of link.

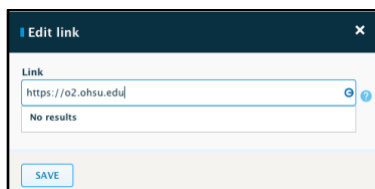


Link to an external website

Link to a website requiring logging in/authentication

A link from the public website to O2, Bridge, or other sites on our network require logging in is known as an Authenticated link and has an associated authenticated link style displaying as a blue lock icon. Because of the variety of these types of links, some of these will not be auto-detected and will need to be added manually from the text editor.

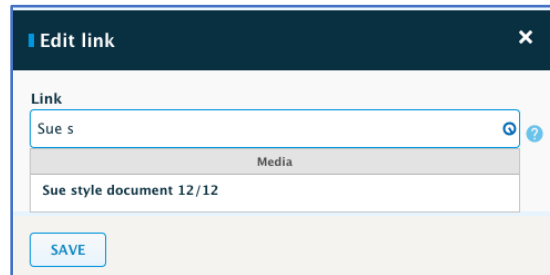
1. Go to your User or Group Dashboard
2. Locate the page containing the text block where you will be creating the link
3. Click **Edit content**
4. Locate the text element where you will be creating the link
5. Create and highlight the text in the text block that you will be linking
6. Click the link icon
7. Type the full URL (including the https:// portion) of the external website to which you will be linking
8. If the authenticated link icon does not show, click your mouse within the newly created link then click the drop-down arrow next to **Styles** in the text editor and select **Authenticated Link style**
9. Click **Save**. A lock icon link style should appear after the link.



Authenticated link

Link to a document uploaded in Drupal

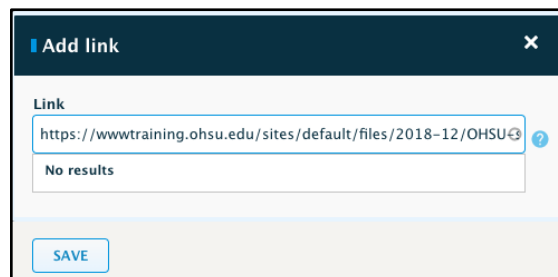
1. Locate the page containing the text block where you will be creating the link.
2. Click Edit to edit the page
3. Create or highlight the text in the text block that you will be linking
4. Click the link icon
5. Begin typing the name of the document in Drupal you will be linking to. Note that the results are found under media. When the name of the document you are seeking displays, click on it to select it.



The screenshot shows a modal window titled "Edit link". Inside, there is a text input field labeled "Link" with the text "Sue s" entered. To the right of the input field are two small icons: a magnifying glass and a question mark. Below the input field, there is a section labeled "Media" which contains a single search result: "Sue style document 12/12". At the bottom of the modal, there is a "SAVE" button.

Searching for document to link

6. When you select the document, the full path to the document will now display in the link box.



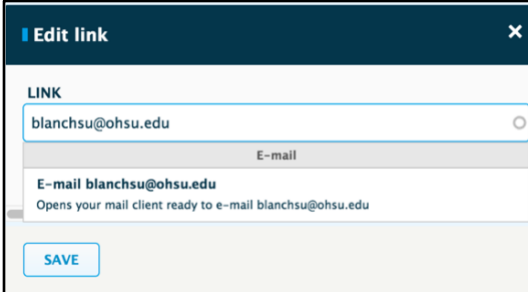
The screenshot shows the same modal window, now titled "Add link". The "Link" field now contains the full URL: "https://wwwtraining.ohsu.edu/sites/default/files/2018-12/OHSU". Below the input field, the text "No results" is displayed. The "SAVE" button remains at the bottom.

Link to document

7. Click **Save**

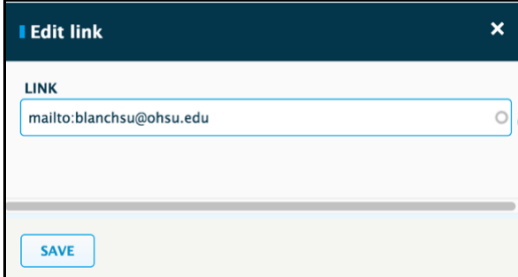
Link to an email address

1. Locate the page containing the text block where you will be creating the link.
2. Click Edit to edit the page
3. Create or highlight the text in the text block that you will be linking
4. Click the link icon
5. Type the full email address to which you will be linking
6. This will generate a fully formatted email address in the space below with some additional text.
7. Click the generated text. This will change the format of the email and add the **mailto:** before the email address as required for linking to emails. (The link will not work if it is missing "mailto:".)
8. Click **Save**



The screenshot shows a dark-themed 'Edit link' dialog box. At the top, there's a title bar with 'Edit link' and a close button. Below it, a 'LINK' label is followed by a text input field containing 'blanchsu@ohsu.edu'. To the right of the input field is a small circular icon. Below the input field, there's a section labeled 'E-mail' which contains the text 'E-mail blanchsu@ohsu.edu' and a smaller line of text 'Opens your mail client ready to e-mail blanchsu@ohsu.edu'. At the bottom left of the dialog is a 'SAVE' button.

Email link input screen



The screenshot shows the same 'Edit link' dialog box, but the 'LINK' input field now contains the formatted email address 'mailto:blanchsu@ohsu.edu'. The 'E-mail' section is no longer visible. The 'SAVE' button remains at the bottom left.

Final result of link to email address

Centralized buildings and campus pages

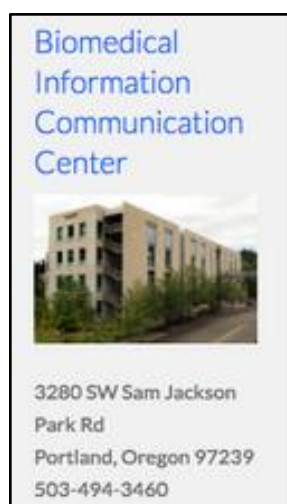
For consistency, please use centralized locations buildings and campus content that has been created and included in Drupal for providing locations and directions on your websites. These pages include maps and directions that will provide a consistent look and feel across all of OHSU's web properties. Do not link to static maps. There are two ways to link to this content.

Building information element

The building information element will add a gray box to your page that has basic information about a centralized location building page. Clicking on the building name will take you to the full page containing more detailed information about the building, including a map. To use this element.

1. Go to your **User Dashboard**.
2. Locate the page you will be adding the building information element to.
3. Click **Edit content**.
4. Find the section on the page where you will be adding the building information element.
5. Click the drop-down arrow next to **Add Text**.
6. Click **Add Building Information**.
7. In the text box under **Building** start typing the official name of the building.
8. When the name of the building appears, click on it to select it.
9. Check the box(es) next to the information you would like displayed for the building
10. Save and publish the page.

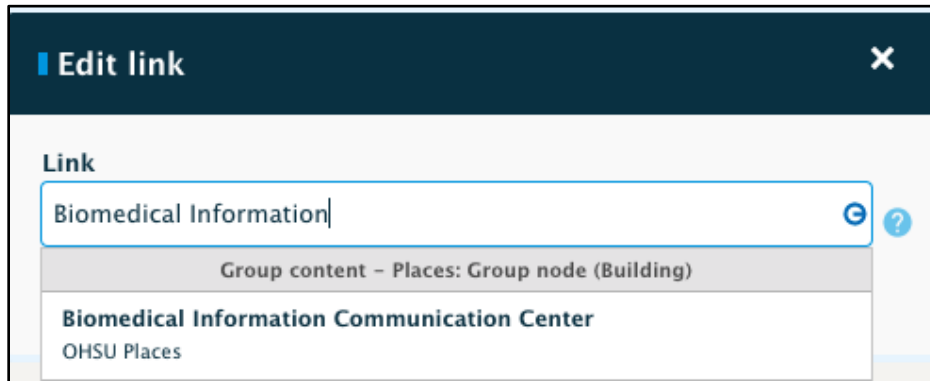
NOTE: If no buildings show up as you type a building name that's spelled correctly, remove the building element, save the page, and go back to Edit Content and try again. (A bug currently exists where deleting any element on a page and then trying to add a building stops the building list from populating.)



Building information element example

Link to buildings and campus pages

1. Locate the page containing the text block where you will be creating the link.
2. Click Edit to edit the page
3. Create or highlight the text in the text block that you will be linking
4. Click the link icon
5. Begin typing the name of the building or campus. It must be the official building or campus name. When the name of the building appears under Group content: Places: Group node (Building), select it.



Linking to buildings in group places

6. When the building is selected, the path to the building will now be displayed in the link box
7. Click **Save**

Menus and navigation

There is a limit of nine items per level and a total of three levels. Adding more than nine items will still only result in a maximum of nine displaying.

Add a Drupal page to the menu

If this was not done when the page was created, it will need to be done by editing the page's metadata.

- If you are already on the page: Click the **Edit Content Metadata** tab OR
- From your User Dashboard: locate the page you are working on, and to the right of it, click **Edit Metadata**.
- Click the arrow next to **Menu Settings** and check the box next to **Provide a menu link**
 - Add a **Menu link title** that will show in the menu (navigation).
 - Add a **Description** (This is not the metadata description. This is what will show on hover)

Edit what is displayed on a menu item

1. Go to the group dashboard for the group whose menu item you will be editing
2. Click **Edit Group menu**
3. Locate the menu link item you will be editing and click the **Edit** button on the right of it under **OPERATIONS**
4. Make any changes to the menu settings
5. Click **Save**

Change the order or level of menu items

- Go to the group dashboard for the group whose menu you will be changing
- Click **Edit Group menu**
- Drag the cross-hair arrows to the left of the menu link to create your preferred menu hierarchy
- You can re-order the menu items and/or change the levels up to a total of 3 levels
- Click **Save Group Menu** after making all changes

MENU LINK	MENU LINK	MENU LINK
✚ Assets	✚ Assets*	✚ Completed Basic Page
✚ Exercise Instructions*	✚ Completed Landing Page*	✚ Assets
✚ Completed Hands-On Exercise*	✚ Completed Basic Page	✚ Completed Landing Page
✚ Completed Basic Page *	✚ Exercise Instructions*	✚ Completed Hands-On Exercise
✚ Completed Landing Page	✚ Completed Hands-On Exercise*	✚ Exercise Instructions

Original menu order Reordered menu Multi-level menu items

Getting help

There are a number of resources available to you from Digital Strategy.

Important URLs

- **Digital Strategy Blog:** <https://o2.ohsu.edu/blogs/webstrategies/>
- **Digital Strategy Help Desk:** <https://o2.ohsu.edu/websupport>
- **Digital Strategy O2 Site:** <https://o2.ohsu.edu/web-strategies/index.cfm>
- **Digital Strategy Search Center:** <https://o2.ohsu.edu/searchcenter>
- Log in to our training environment: <https://wwwtraining.ohsu.edu/cms>
- Log in to our Production environment of Drupal: <https://www.ohsu.edu/cms>

Reminders

- All authors must log in to our production environment after completing Drupal training so that we can configure your account for authoring access.
- All pages should go through the workflow in order to be published. This includes both initial publication of the page as well as any future changes made to the page.
- The minimum steps required for all pages to be published:
Draft → Needs Review → Publish
If there is an issue:
Needs Review → Needs Editing → Needs Review (repeat cycle until all corrections made) → Published
- There is no warning when deleting elements from a page. Once you click the button to remove them, they are gone.
- For pages to show in the menu/navigation, they must first be set to **Provide a menu link** or they will not be available in the menu
- Editing landing pages should be started by going to the **Group Dashboard** and clicking the **Edit Content** link to the right of the landing page name.
- There is a minimum of 50 characters for the metadata description of pages.
- The menu link description is not the same as the metadata description. Menu link description will not help with search results.
- Elements cannot be duplicated from one page to another or from one column or element to another.
- There is not yet an option for maintaining previous version history of documents. When a document is deleted, thus goes its history. The only way to update a document is to delete the document and replace it with a new document.
- Please use the Centralized Locations and Campus pages for locations and directions to your website. Do not add individual locations pages. Likewise, do not link to static maps, as our location pages also contain a map to the location.