CEH Admin guide

Course goals

- Logging in
- Understanding the Drupal administrational menu

Managing content

1. Logging in

- /user needs to be added to URL. The default login screen will be shown where the user adds a their login details (username /password)

Home

User login

| Create new account | Log in | Request new password |

Username *

Enter your Centre for Ecology & Hydrology username.

Password *

Enter the password that accompanies your username.

Log in

2. Administrational menu

- Once logged in a black menu bar will appear at the top of the screen. This is where you can manage content, users and the sites structure. Note that all menu items are clickable and most have drop downs for quick access to creating content.

Items on the menu include:

My Workbench | Dashboard | Content | Structure | People | Configuration

- My Workbench. This is where you can manage the CEH content workflow process. Accept content from other users and review the content you have added.
- Content. This is where you can manage all content on the site. You can filter, remove and edit all site wide nodes.
- Structure. This is where you can manage the sites structure. Blocks, taxonomies and views can be found here.
- People. This is where you can manage the sites user accounts. Staff profiles can be filtered, removed and created here.
- Configuration. For development, please ignore unless otherwise stated below.

3. Workbench

Please note: the only content type included in the workflow and the following is only relevant to are blogs.

- /admin/workbench. This page is a simple dashboard which shows your recently added content ('my edits') and all content added by other users ('all recent content'). On this page there are 3 other tabs:

1. /admin/workbench/create. Create content: you can create nodes (blogs, events, news) from this page
2. /admin/workbench/drafts. My drafts: this shows your draft content which is not yet live. At this stage, you can only save a blog item into draft whilst all other content is published live directly.
3. /admin/workbench/needs-review. Needs review: this is where all the content (mainly blogs and projects) are listed ready for review.

a. Publishing content from NEEDS REVIEW

- All content created by other staff members which need to be made live by web managers will be listed here. This content currently sits in draft. You can change its moderation state to either draft or published under 'set moderation state'.
- Clicking on the title of the page will display the content.

b. Publishing content from the page

- You can also publish content from the edit page of the node. For example:

    1. Click 'edit draft' on a blog page.

    2. Scroll down to the bottom of the page, where you see the option 'Publish options'.

    3. Under publishing options you can change the moderation state to published and add moderation notes.

Please note: if your change to a page is not visible once saved, it could be due to the moderation state still being in draft. Make it published to check.

c. Viewing moderation

- Moderation notes and its status change of a page is all captured in the 'moderation' tab so you can see the history of a page.

4. Creating content

- The access the following list of content types, simple hover on content > add content. This will take you to the node template for creation.
- The following templates are available for creation:
    - Basic page
    - Blog entry
    - Brochure
    - Carousel
    - Event
    - Facilities
    - Job
    - Landing page
    - News
    - Press release
    - Project
    - Service

5. Default options when creating content

- Every node you create has a selection of options at the bottom of the edit page which includes:
  - Menu settings: if you wanted to create a menu for the page you are building then you can click 'provide a menu link' and then place it within the menu structure.
  - URL path setting: by default Drupal will create the URL based on the nodes title but if you wanted to customise the URL then you can un-tick 'generate auto ULR alias' and write the URL in the box below
  - Comment settings: if you wanted comments enabled on this page then you can click 'open'. Comments have not been setup so this is not suggested.
  - Scheduling options: if you want the page to publish in the future then you can add the date and time for publication here. The content will automatically publish at this time / date.
  - Authoring information: the author of the content will automatically be assigned to person who created the page. This can be overridden by changing the username of the user in the 'authored by' box
  - Publishing option: choose to publish or not publish this content. By default it will publish for all content besides blogs which is in workflow.

6. Specific content types

We've detailed out some specific content types, all the others are relatively simple and follow the same structure as the following:

a. Projects

1. Add content via the top admin bar: Content > add content > project
2. Title - free text field. Displays at the top of the page
3. Subtitle - free text field. Displays just below the title
4. Primary image - you can either upload from your local or use the library widget. Is display on the project landing page, not the page.

5. Body - Wysiwyg field. Displays as the main section of content on the page.

6. Multimedia - video URL. You can add a YouTube URL to this field and it will display a video on the page.

7. Principal investigator - user reference. This allows you to search all users on the site by <u>username</u> (currently). Once a person is selected, it will display in the top right of the projects page. More then one principal investigator can be added.

8. Contact email - email field. Displays as a email link on the project page.

9. Partners - select field. Displays as an associated partner in the project page.

10. Funders - select field. Displays as an associated funder in the project page.

11. Science areas - select field. Taxonomy associated to the project. It doesn't display on the page but it helps for related content.

12. Issues - select field. Taxonomy associated to the project. It doesn't display on the page but it helps for related content.

13. Publication reference - node reference field. Allows you to add a publication from the system to the projects page.

14. Related link - two fields the URL and title, the title becomes linked on the page. Multiple items can be added.

15. Map location - GEO location field. You need to add the GEO location of the project which displays as a map on the page. Use the following format: title|lat,lon e.g project1|51.5465166,-0.1058174. Locations can be retrieved from Google maps.

16. Term Node Display Location Options - select list. Selecting 'Science' in this field will add this project to the homepage. The 'display locations weight' can be ignored.

b. Carousel

1. Add content via the top admin bar: Content > add content > carousel
2. Title - free text field. Displays as the main title on the carousel (black background)
3. Image - Asset Bank or image upload. Displays as the main image and needs to have a long width / height for quality
4. Link - internal URL. Only excepts a relative internal URL without the http://www.ceh.ac.uk/ before. For example: our-science.
5. Subtitle. Displays below the main carousel title and image.
6. Carousel page. Select which page the carousel should be displaying on.
7. Display position. The carouse excepts a maximum of 5 images, this is where you select its position.

c. Landing page

1. Add content via the top admin bar: Content > add content > landing page
2. Title - free text field. Displays as the main title on the page (black background)
3. Subtitle - free text field. Displays just below the title
4. Primary image - can be ignored for the landing page. It's not needed.
5. Hero image - image field. Displays as the main page header behind the title and menu. Needs to have a long width / height for quality.
6. Body - Wysiwyg field. Displays as the main description below the main image.

7. Taxonomy

Drupal taxonomies are vocabularies used to categorise content on the site and in order to build relations between entities. There are 7 vocabularies used on the website:

- Facility Type - *determines what kind of facility a node of 'Facility' content type is*
- Funders - *a list of CEH funders*
- Issues - *detailed scientific categories of content*
- Nora Keywords - *stores NORA publication keywords (only for admin purposes at present)*
- Partners - *a list of CEH partners*
- Science areas - *broader categorisations of scientific content*
- Services - *categories for services provided by CEH*

A vocabulary can be thought of as a list of terms that can be applied to an element with that taxonomy. For example, the "Facility Type" vocabulary can be used to categorise a facility with the terms "Research Facility" or "Monitoring Site".
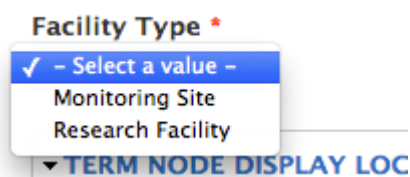
a. Editing taxonomies

To view and edit taxonomies, go to Structure > Taxonomy from the admin menu.
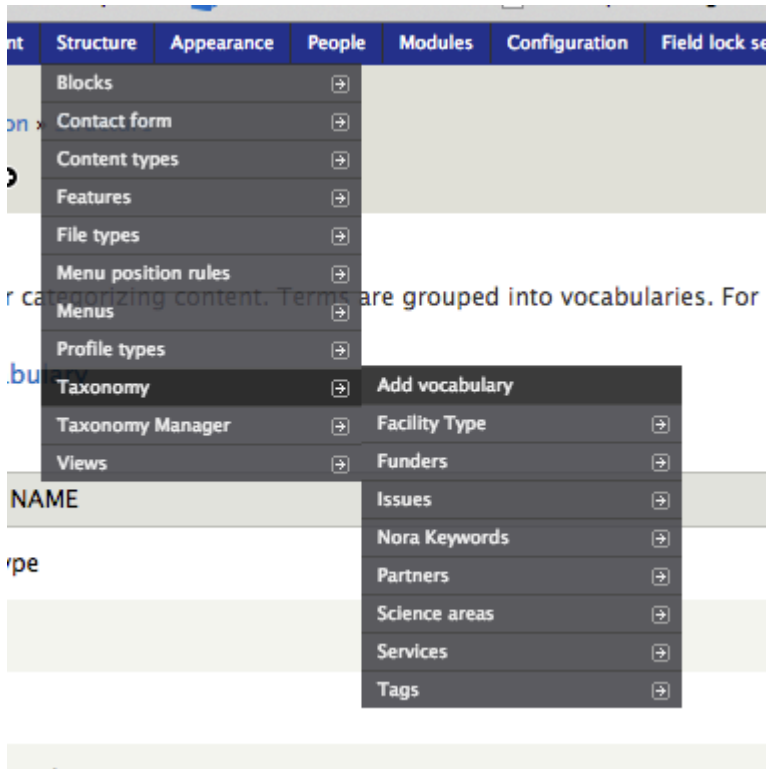
From the taxonomy page, you can edit any vocabulary on the site. You may click 'edit vocabulary' to change the name and description of a vocabulary. You may also click 'list terms' to view and edit the terms that the vocabulary holds.

VOCABULARY NAME	OPERATIONS		
⊹ Facility Type	edit vocabulary	list terms	add terms
⊹ Funders	edit vocabulary	list terms	add terms
⊹ Issues	edit vocabulary	list terms	add terms
⊹ Nora Keywords	edit vocabulary	list terms	add terms
⊹ Partners	edit vocabulary	list terms	add terms
⊹ Science areas	edit vocabulary	list terms	add terms
⊹ Services	edit vocabulary	list terms	add terms
⊹ Tags	edit vocabulary	list terms	add terms

b. Science areas & issues

'Science areas' and 'Issues' are vocabularies used to organise all scientific content of the CEH website into categories. By categorising content using these vocabularies, Drupal can place the content in relevant areas and greatly improve the accessibility of information across the site. For example, content that has an 'Issue' will be made accessible to the user from the 'Science Issues' page from the main menu, as shown below. Alternatively, if a user is viewing content, Drupal will recommend related content with the same science issues in the right hand sidebar.

Environmental science

Agriculture   Atmospheric pollution   Biodiversity

Science areas and issues can be assigned to a node when the node is edited. In order to assign multiple issues and/or science areas, hold the 'Ctrl' key while selecting terms from the list.
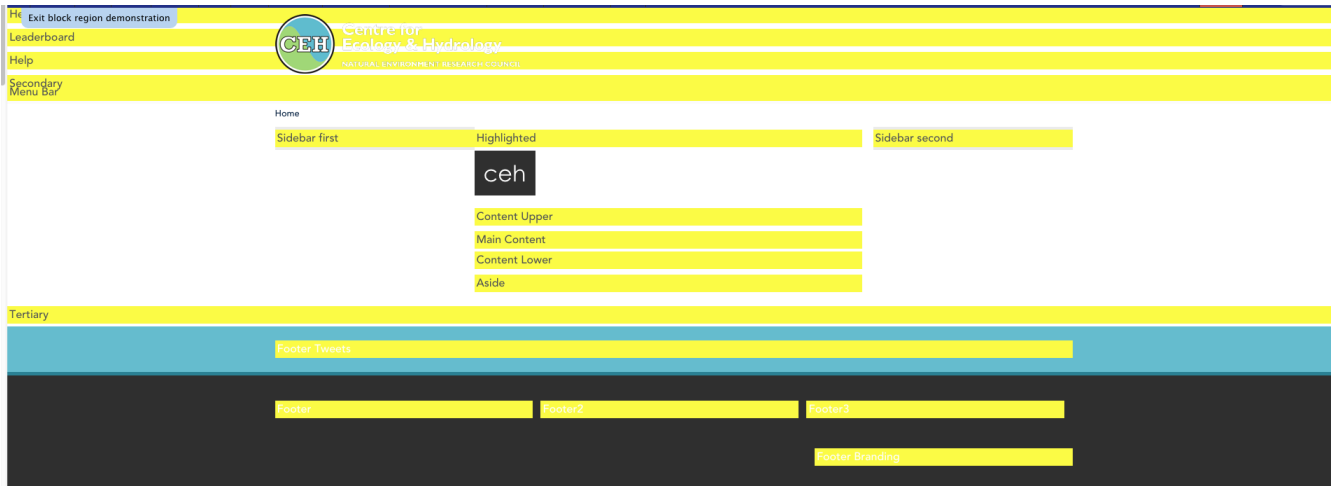

8. Blocks

A block is a pre-configured element which can be positioned in any desired region of the site. For example, the 'Recent News' block will display news which has been recently added to the site. The recent news can therefore be displayed on the sidebar or the main content of the site.

Block configurations can be reached by 'Structure' > 'Blocks' from the admin menu.
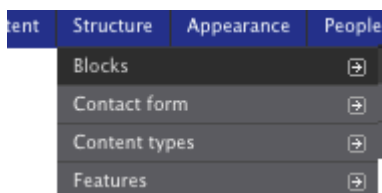
a. Block positioning

Blocks may be placed in any 'block region' of the site. To view the available block regions, click 'Demonstrate block regions' from the block configuration page.

The block configuration page displays a list of the blocks which are present on the site. Blocks can be moved into the desired region by dragging the item below the name of the region in bold. Note that blocks will also appear on the page in the order that they appear in the list.

BLOCK	REGION	OPERATIONS
Sidebar first		
No blocks in this region		
Sidebar second		
⊹ Exposed form: blog-block_2	Sidebar second ⇅	configure
⊹ Exposed form: staff-block_1	Sidebar second ⇅	configure
⊹ Exposed form: projects-block_1	Sidebar second ⇅	configure
⊹ Node Social Media	Sidebar second ⇅	configure
⊹ Side Bar – Principal Investigators	Sidebar second ⇅	configure
⊹ Side Bar – Recent News	Sidebar second ⇅	configure

b. Block configuration

A block may be individually configured in order to change its title or visibility settings. To configure an individual block, click 'configure' on the right hand side of an item in the blocks configuration list.

Main Content		
⊹ Image Menu – About us	Main Content ⇅	configure

To change the title given to a block (for example 'Events'), simply type the title into the 'Block title' field. If you do not wish to display a title, type '<none>' into this field.

The 'visibility settings' of a block can be used to control when the block should be visible at its given region. For example, an admin may only wish for the 'Events' block to display in the sidebar when the user is on the events page. There are multiple conditions which may be set to determine the appearance of a block. A block may also be set to only appear when the user is viewing specific content types and pages, or when the user has enough privileges to view the block.

'Page Content – Events' block ⚙

Block title

<none>

Override the default title for the block. Use *<none>* to display no title, or leave blank to use the default block title. This field supports tokens.

REGION SETTINGS

Specify in which themes and regions this block is displayed.

ceh (default theme)

Main Content ⬍

Seven (administration theme)

- None - ⬍

Bartik

- None - ⬍

Visibility settings

| Pages Restricted to certain pages	**Show block on specific pages**
Content types Not restricted	○ All pages except those listed
Roles Not restricted	● Only the listed pages
Users Not customizable	get-involved/events

Specify pages by using their paths. Enter one path per line. The '*' character is a wildcard. Example paths are *blog* for the blog page and *blog/** for every personal blog. *<front>* is the front page.

9. User management

a. Users

An administrator may control other users of the site from the 'People' section of the admin menu.
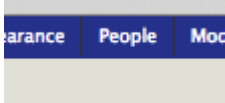
The 'People' page shows a list of all users who are registered to the site. An admin may add a user by clicking 'Add user' at the top of the page, or edit a user by clicking 'edit' on the row representing that user.

	USERNAME	STATUS	ROLES	MEMBER FOR ▼	LAST ACCESS	OPERATIONS
☐	Carol Diffenthal	active	• HR	1 day 3 hours	never	edit
☐	felisha935	blocked		1 month 4 days	never	edit
☐	joyt	active	• staff member	2 months 1 week	never	edit
☐	anit	active	• staff member	2 months 1 week	never	edit
☐	tpeters	active	• staff member	2 months 1 week	never	edit
☐	oliver.pescott	active	• staff member	2 months 1 week	never	edit
☐	annt	active	• staff member	2 months 1 week	never	edit
☐	betpen32	active	• staff member	2 months 1 week	never	edit
☐	rebpat	active	• staff member	2 months 1 week	never	edit
☐	rpin	active	• staff member	2 months 1 week	never	edit
☐	akp	active	• staff member	2 months 1 week	never	edit

b. Permissions

Each user is assigned a 'role' that determines what levels of permissions they may have across the site. Permissions may be used to prevent unauthorised access to sensitive Drupal configuration or content by non admin users. There are 6 main roles used by CEH:

- Administrator - *Full permissions across all drupal configuration and content*
- Web Manager - *Limited permissions across all drupal configuration and full permissions across content*
- Content Manager - *Full permissions across all content*
- Senior Staff - *Permissions to create project and event content*
- Staff - *Permissions to create blog content*
- HR (Human Resources) - *Permissions to edit job content*

The finer details of permissions granted to each role can be set by accessing the 'Permissions' page located at 'People' > 'Permissions' from the admin menu.

PERMISSION	ANONYMOUS USER	ADMINISTRATOR	AUTHENTICATED USER	WEB MANAGER	CONTENT MANAGER	SENIOR STAFF	STAFF MEMBER	HR
Administration menu								
Access administration menu Display the administration menu at the top of each page.	☐	☑	☑	☑	☑	☑	☑	☑
Flush caches Access links to flush caches in the administration menu.	☐	☑	☐	☑	☐	☐	☐	☐
Display Drupal links Provide Drupal.org links in the administration menu.	☐	☑	☐	☐	☐	☐	☐	☐
AssetBank Image								
Administer AssetBank Manipulate settings for AssetBank integration.	☐	☑	☐	☐	☐	☐	☐	☐

A user may be given one or more rules by editing their account as admin and selecting their roles in the checkboxes as shown below.

Roles

☑ authenticated user

☐ administrator

☐ web manager

☐ content manager

☐ senior staff

☐ staff member

☑ HR