

Drupal User Editing Guide

Even if you've had Drupal training as part of the migration process, it's good to have a resource on-hand to reference when you need it.

This guide is here to help if you need a refresher for how to edit and manage content on your Drupal website after you've received training. Use this guide if you need help with any of the following:

- [Logging in to the website](#)
- [Adding a new page on your website](#)
- [Editing an existing page on your website](#)
- [Adding or updating a media item, such as an image or document](#)
- [Reviewing image sizes](#)
- [Adjusting the page names or navigation of your site](#)
- [Editing a biography of a faculty/staff member that appears on your site](#)

If you need assistance with any parts of Drupal that aren't covered in this guide or have any questions, please [contact us](#).

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Logging In and Navigating

Log In to Your Drupal site

Once you have gone through training and been given login access, follow these steps to log in to your new site using Single Sign-On (SSO):

1. Type the name of your site in the address bar. For example:
https://case.edu/yoursitenamehere
2. Add "/caslogin" at the end of the URL. Now the example would look like this:
https://case.edu/yoursitenamehere/caslogin. This will take you to the SSO screen.
3. Enter your CWRU ID and password, then log in. If you are already logged in elsewhere, typing in the URL may automatically log you in and redirect you to your site.
 - a. **Never give out your CWRU password to anyone.** This presents a security risk to the university. If you find that you need additional help editing the website and have a coworker in mind, please [submit a help desk ticket](#) and let us know the CWRU ID of the person you would like to be trained and the website you are requesting assistance for.

Note: You can only login from the homepage of your website. If you try logging in on any page other than the website's homepage, the site will give you an error and not allow you to log in.

What You Will See When You're Logged In

Drupal Toolbar

Now that you're logged in to Drupal, you'll see the Drupal toolbar at the top of every page on your site. If you don't see the toolbar, you are likely not logged in.

If this is your first time logging into the website, click Manage on the left-hand side of the toolbar to the left of your CWRU ID. This will present a new drop-down where you will see the options for Content and Main Navigation Menu.

If you click your CWRU ID, a set of options will appear on the left-hand side of the toolbar: View Profile, Edit Profile and Log Out. To get back to the editing options from your CWRU ID settings, click the Manage option on the left-hand side of the toolbar.

The Content Overview Page

To access the content menus on your site, make sure **Manage** is selected in the toolbar.

Clicking on Content takes you to the Content Overview page. This is where you'll be able to see all of the pages on your site.

In Drupal, you'll see that pages are referred to as content types. These are assigned when the page is created based on the type of content a page will contain.

To help you find the page you need, you can sort by:

- Title: This sorts alphabetically by the title of the page.
- Content Type: This groups pages together of the same type and displays like content in order.
- Status: This groups pages that are published and unpublished and displays them in order.
- Updated: This will display the pages based on when they were last updated.

You can also search for specific pages using the search bar if you know at least part of the page's title.

Editing Content

You'll manage content in Drupal using the page editor.

Getting to the Page Editor

Via the Content Screen

1. Find the page you want to edit by typing a portion or all of the page title in the text box below Title.
2. Click Filter and find the page in the list.
3. Click Edit under Operations on the far right of the corresponding page name.

Via the page

If you are already on the page you want to edit, click Edit below the site navigation.

Content Considerations

When editing content, we recommend to always keep the [Publishing Checklist](#) in mind, as this page includes common dos and don'ts, as well as accessibility considerations when it comes to working with content.

Publishing Options

There are different ways to save your work within Drupal, such as Save Draft, Publish, and Unpublish. Each of these options save your page in different ways.

[Learn more about publishing options.](#)

The WYSIWYG Editor

The bulk of the text content on the page editor is managed through the WYSIWYG editor. WYSIWYG stands for what you see is what you get. The WYSIWYG editor is an interface that allows you to see a basic representation of what your live page will look like—as you create it.

Toolbar

The WYSIWYG editor contains two main elements: the toolbar and the text box. The toolbar allows you to format your text, add images, link to documents or other websites, insert anchors, create tables and view and edit the HTML source.

Use the table below for a quick reference on the function of each item in the WYSIWYG toolbar. If you would like additional tips and tricks for how to use the options provided in the WYSIWYG, please view the content highlighted below the table.

Name	Function
Bold	Applies bold styling to text.
Italic	Applies italic styling to text.
Superscript	Makes text smaller and places it to the top right of the text before.
Subscript	Makes text smaller and places it to the bottom right of the text before
Remove Format	Removes previously applied formatting from text.
Increase Indent	Increases the indent in a bulleted or numbered list.
Decrease Indent	Decreases the indent in a bulleted or numbered list.
Link	Creates a link within your page content.

Bookmark	Previously called 'Anchor'. Sets bookmark points within the text on the page.
Bulleted List	Creates an indented list with bullets.
Numbered List	Creates an indented list with numbers.
Insert Media	Embeds images from the media library.
Table	Inserts a table.
Video Embed	Places a video from Youtube in the content that can then stream on the page.
Block Quote	Applies block quote styling to the selected text.
Horizontal Line	Inserts a horizontal line.
Paragraph Styles	Changes text format for headers and body text.
Text Styles	Add button styles to selected link text.
Source	Switches to HTML editor.

Text Formats

Bold

Bold styling should only be used for **emphasis** on key words or phrases within a paragraph and not in place of headers. If you find yourself starting a new paragraph or section on a page with a bolded word or line, it may be best to translate the bolded section into an appropriate header style instead.

Italic

Italic styling is typically used just for publications and book titles in order to follow the university's AP styling. [Learn more about the editorial style guide.](#)

Block Quote

While styled differently than other text formats, block quote styling should only be used

when calling out a quote from another source, and not only for styling purposes. Block quote styling is used by screen readers to help identify when a quote is added to a page.

Remove Formatting

To use the Remove Format button, highlight the text you would like to remove the formatting from and then select the Remove Format button from the WYSIWYG.

Linking

You have the ability to link to other pages on your website, a file uploaded to the Media Library, anchor points on your webpage, other website URLs, or email addresses. When linking to a page or document on your website, we recommend to use Drupal's built-in linking feature to ensure your link doesn't break if the page you are linking to has a name change or the location of the page changes. [Learn more about linking in Drupal.](#)

Insert Media

The Insert Media option in the WYSIWYG allows you to embed an image that has been uploaded to your Media Library previously.

1. In the WYSIWYG editor, click where you would like the image to appear on the page.
2. Select the Insert Media button, and select the image you would like to use from your Media Library.
3. Choose the size you would like the image to be (Small, Medium, Large, or Original size) and choose if you want the image to be left-aligned or right-aligned with the text (or not at all).
4. Click Embed to add your image to the page.

Table

Tables should only be used to quickly compare and contrast data on a page and should not be used for styling purposes only. Tables also need to have a header row or column applied to be compliant with accessibility guidelines.

Horizontal Line

Horizontal lines are used to provide some additional style for separation between two different ideas or pieces of content on a page. It is generally recommended to add a new heading after the horizontal line to assist with the separation of ideas.

Paragraph Styles Dropdown

Headings can be changed under the Paragraph Styles dropdown in the WYSIWYG.

To add a heading to your page:

1. Highlight the text you would like to make into a heading.
2. Click the Paragraph Styles dropdown in the WYSIWYG and select the proper heading style.

To remove a heading from your page:

1. Highlight the heading text.
2. Click the Paragraph Styles dropdown menu.
3. Select the option for 'Paragraph'. This will remove the heading style previously applied to the highlighted text.

Please note: Heading tags are used for headings only and not for emphasis within normal text. Bolded text should be used for emphasis, and not in place of headings.

[Learn more about using headings.](#)

Text Styles Dropdown

Buttons can be used to call more attention to your link. These can be applied under the Text Styles dropdown in the WYSIWYG.

To add a button to your page:

1. Highlight the linked text you wish to apply the style to (text must already be linked).
2. Choose a button style from the Text Styles drop-down menu.

To remove a button from your page:

1. Highlight the button in the WYSIWYG
2. Click the Text Styles dropdown menu

3. Re-select the button style

Please note: If a link is removed, the button styling will automatically be removed with it. You can add the button style back once a link is added again.

Adding New Pages

Once you're ready to create a new page, hover over Content and then Add Content in your Drupal toolbar. This will prompt you to select what type of page you'd like to add. If you're unsure about which type of page will work best for your content, please refer to the list of available [pages in Drupal](#).

Adding pages to the navigation

All pages on your site should have a place in your navigation. Once the page is ready to be published, please follow the steps to [add your page to the navigation](#).

Publishing pages

Once your content is ready to be published, please [review the publishing checklist](#) to ensure your content is accessible and follows best practices. You can then save your page as a draft and keep working, or (if your content is complete) publish the page. [Learn more about publishing your page](#).

Linking In Drupal

Documents

Before adding a link to your page, please ensure that any PDFs or other documents you would like to link to have been added to the media library first. That process is covered in the [Managing Images and Documents section](#).

Link Text

When linking to a document, webpage, or email, it's crucial to use clear link text. This text informs users where the link will lead them. Providing descriptive link text such as the destination's title rather than generic terms like "click here" or "learn more" benefits all users. It ensures everyone, including those who rely on assistive technologies like screen readers, can better comprehend the purpose of each link on the page.

[Learn more about purposeful links.](#)

Linking

To link to an **external** webpage or email:

1. Highlight the text you wish to link to.
2. Select the Link button in the WYSIWYG editor.
3. Paste the website or email address you wish to link to in the URL box.
4. If you wish to have your external webpage open in a new window, click your newly linked text and select the Link Properties icon in the popup options. You can then toggle the 'Open in a New Window' option on.

To link to an **internal** web page or document:

1. Save the document in the media library.
2. Highlight the text you wish to link to.
3. Select the Link button in the WYSIWYG editor.
4. Begin typing the name of your document or page.
5. Select your page or document as it displays in the dropdown.

To **remove** a link:

1. Click the linked text you would like to remove the link from
2. Click the unlink option in popup options.

Buttons

You also have the option to style a link as a button. [Learn more about styling links as buttons.](#)

Adding a Page to the Navigation

All pages on your site should have a place in your navigation.

This is one of the most important steps in creating a new page. After creating a page, your next step should be to decide where this content will live in the navigation so users can find it. **Do not use the Main Navigation Menu link in the black toolbar at the top of the screen to nest pages.** Instead, follow the steps below.

To place the page within the navigation on your site, use the Menu Settings dropdown on the right-hand side of your screen when editing the page.

- Select Provide a menu link and give the page a link title. This will be the title for your page that displays in the navigation. The link title should match that of the page title.
- Choose a Parent link*, or the section your new page will live under on the website, from the drop-down menu.
- Assign the page a weight. This determines what order you'd like the page to appear in the navigation or drop-down menu. Pages with a greater weight will be listed at the top of pages with a lower weight.
 - You can also adjust what order pages appear in after the page has been added to the navigation. [Learn how to update the order of pages in the navigation.](#)

*Parent pages are pages that host pages underneath them. A parent page can have multiple child pages. For example, the main pages of your navigation are considered "parent" pages, while the "child" pages are those displayed in the drop-down menu.

URL Aliases

Website URLs should follow the same structure as where they are located on the website. For example, a Contact Us page will likely have the URL of case.edu/sitename/about/contact-us. This structure is reflected in the breadcrumbs of the page as well, giving users multiple ways to ensure they are on the right page, as well as giving them information about how to navigate your website to learn more about a specific topic.

Vanity URLs

Sometimes a shorter URL, also known as a vanity URL, is required for marketing purposes. **These URLs should be uncommon on your website and should not be used or needed for every page on your site.**

If you find yourself needing a shorter URL for a webpage, please email help@case.edu or [submit a help desk ticket](#) and let us know the following:

1. the current page's URL
2. the shorter URL you are requesting
3. the reason for the request

From there, our team can assist in ensuring the vanity URL is put in place properly.

Adjusting Page Names or Page Order

All page names and menu link titles should match on each page. Users coming to your website might be confused if they clicked on a wrong link or if they are in the right place if the page name and the menu link title don't match. If they don't match, the breadcrumbs and URL for the page won't be consistent with the menu link.

Updating Page and Navigation Link Names

In order to update a page name, edit the page and replace the Title section at the top of the page. Once the page name has been changed, make sure to then un-check and re-check the "Provide a Menu Link" button on the right-hand side of the page. By re-checking this option, Drupal will automatically update the menu link title to match what is in the Title field.

Once both the Title and the Menu Link Title fields are matching, save the page as a Draft or Publish the page.

Updating the Navigation

Changing the Location of a Page

Parent pages are pages that host pages underneath them. A parent page can have multiple child pages. For example, the main pages of your navigation are considered "parent" pages, while the "child" pages are those displayed in the drop-down menu.

If you want to move a page from one parent page to another:

1. Edit the page and look to the right-hand side of the page under Menu Settings.
2. Click on the dropdown under Parent Link and choose the new location of the page.
3. Save the page.

Changing the Page Order in Your Navigation

If you want to change the order of pages on a site to have one appear before the other in the navigation, you have two options.

Menu Settings Using Row Weights

Edit the page you would like to update. Under Menu Settings in the right-hand side of the page, assign the page a weight. Pages with a lower weight will be listed above pages with a higher weight. For example, a page with a weight of 5 will display above a page with a weight of 10.

Main Navigation Menu Using Drag and Drop

- Click on the Main Navigation Menu option in the black toolbar at the top. This screen will show you the site structure of your entire website.
- On the left-hand side, use the gray crosshairs to drag and drop the pages to update the order they will appear in the navigation.
- Once you're happy with the order of the pages, scroll to the bottom of the page and click Save.

Please only use the Main Navigation Menu option for pages of the same hierarchy, or pages that live under the same parent item. **Do not use the Main Navigation Menu to move a page from one parent page to a new one. Doing so will break the page breadcrumbs and the automatically generated URL alias for the page.** If you want to move a page from one parent page to another, use the steps above for [Changing the Location of a Page header](#).

Using the Main Navigation Menu

The Main Navigation Menu in the Drupal toolbar should be used with caution. The only time you should ever need to use the Main Navigation Menu is for two things:

- Changing the order a page appears in within the navigation
- Disabling a biography, news article, or event from the navigation

The following actions should not be done using the Main Navigation Menu:

- Nesting a page within the navigation
- Moving a page under a new parent page
- Renaming a page in the navigation
- Creating a new link within the navigation

Removing a Page from the Navigation

All pages, including those you'd like to hide from the navigation, need to be nested within the navigation first. This will ensure that breadcrumbs and the URL are set up properly for your page. To learn how to nest a page within the navigation, please review [Adding New Pages](#).

Please note: The only pages that should be removed from the navigation are [biographies](#), [news articles](#), and [events](#) pages. All other pages on the website need to be visibly nested within the navigation.

To hide a published and nested page from the navigation:

1. Click on the Main Navigation Menu option in the black toolbar at the top of the screen. This will show you the entire navigation of the website.
2. Locate the name of the page you would like to hide from the navigation.
3. Uncheck the box to the right of the page name.
4. Scroll to the bottom of the screen and click Save.

Working with Images and Documents

The Media Library

The media library stores all of your documents and images in one location so you can easily access and add them to any page. In the media library, you can see all the media that exists on your site. You can search for, edit, add or delete media here as well.

Accessing the Media Library

The media library shows all of the files currently uploaded to your site and gives you access to edit or delete each individual file. There are two ways to access the media library—through the content overview and through the Drupal toolbar.

Via the content overview

1. Click Content in the Drupal Toolbar.
2. Click Media at the top left of the content overview page.

Via the Drupal Toolbar

1. Hover over Content in the Drupal toolbar
2. Click Media

Images

When using images on your site, please think about where you will be using the image and what size the image needs to be in order to fit the space properly. For example, a hero image requires a slightly wider image compared to a biography or news article.

Acceptable Image Types

Images can be .jpegs or .pngs, but **do not upload .gifs or any sort of video to the Media Library**. .gifs are typically inaccessible forms of media, as users don't have the ability to stop the animation.

Image Sizes

We suggest using the following image sizes:

- Homepage/Hero Images: 1224 x 662 px
- Subfeature Images: 705 x 528 px
- Asides: 664 x 374 px
- Biographies: 250 x 300 px
- Event or News Article Images: 300 x 300 px
- Gallery Images: 946 x 473 px
- No images larger than 2000 px wide and 800 px tall, or larger than 1MB.

You must have permission to use any photo you upload to your website.

[Learn about working with images in the Media Library.](#)

Documents

When using documents on your site, please think about where you will be using the document and how best to display your information. For example, content within a document can sometimes be better displayed as content on a page with appropriate headers and links.

Also consider digital accessibility when deciding if you should include your document on the website. [Learn more about digital accessibility for documents.](#)

Acceptable Document Types

Typical document types are .pdf, .doc, .docx, .ppt, .pptx, .xls or .xlsx, but Drupal can host some additional document types such as .txt or .csv files as well.

Adding Documents to the Website

Before adding a document to a page, please make sure the document has been [uploaded to the Media Library](#) first. Once a document has been uploaded to the Media Library, you can then use the Link option within the WYSIWYG editor to add the document to your page. [Learn more about linking to your document.](#)

Adding and Deleting Images and Documents

Uploading New Media

To upload an image or document—like a PDF—to your media library:

1. Click Add Media at the top right of the media library
2. On the next page, select the type of media you want to add to the media library

Alternatively, you can access the add media page directly through the Drupal toolbar.

1. Hover over Content in the Drupal toolbar
2. Hover over Media
3. Click “Add New Media”

Images

Uploading an Image

1. On the add new media page, select Image.
2. On the next page, click Choose File under the Image heading.
3. Select the image in the File Upload window and click open.
4. Provide alternative text for the image. [Learn more about how to write alternative text.](#)
5. Provide a media name for the image. This can either be the file name or the image’s title. Editors on your site will be able to search for the image by the media name.
6. Click Save.

Changing the Focal Point

Having a specific focal point for images keeps the focus on one point as the page adjusts for different browsers or content sizes. This can be incredibly helpful for larger images and hero images. If you have to use an image that was cropped incorrectly, changing the focal point could help.

To change the focal point of the image, click and drag the white crosshair on the image. Place the crosshair over the most important point of the image.

Note: While Drupal allows you to choose a size and focal point when working with images, Drupal is not an image editing software. If there is a specific image size or dimension you need, update your image in an image editing software such as Photoshop first before uploading the image to the website.

Documents

PDFs and other documents must be added to the media library first before linking to them from a page.

1. On the Add New Media page, select Document.
2. On the next page, provide a media name for the document. This can either be the file name or the document's title. Editors on your site will be able to search for the document by the media name. Do not fill out the description field.
3. Click Choose File under the Document heading.
4. Select the document in the File Upload window and click open.
5. Click Save.

[Learn about how to link your document within a page on your website.](#)

Editing Media

You can update or change media through the media library, and Drupal will update it on every page it appears.

1. Navigate to the Media Library
2. Find the media you want to edit by typing in a portion or all of the name into Media Name and click Apply OR scroll through your media to find it manually.
3. Click Edit in the drop down menu at the bottom of the media.
4. On the next page, you can change the media information or replace the media with a new file.

Replacing Media

If you have an update to a document on your website, you can replace the media file with the updated document rather. To replace media with a different file:

1. Navigate to the media.

2. Click Remove.
 - a. The Remove button is located to the right of the file name.
3. Upload the new file
4. Click Save

Deleting Media

If you no longer want a document or image to exist on the website, you'll need to delete it from the Media Library.

1. Navigate to the Media Library
2. Find the media you want to edit by typing in a portion or all of the name into Media Name and click Apply OR scroll through your media to find it manually.
3. In the dropdown under your media file, click Delete

Adding Media to a Page

Whether you're looking to add an image or link a document to a page, make sure it has been uploaded to your Media Library first. You can learn how to do this by reviewing the [Uploading New Media](#) section listed above.

Once the image or document has been uploaded, edit the page you would like the media to appear on and then follow the steps listed on the [WYSIWYG Editor page](#) to learn how to add your media item to the page.

Publishing Checklist

Are you ready to publish your page? Double-checking your content before you publish can help ensure that you aren't creating any accessibility errors on your website.

Following are the items you'll want to look over before you switch a page to Publish.

Links

Whether you're linking to a document, another webpage or an email, you need to make sure you have clear link text. Link text is going to let a user know where that link will be taking them. Having more information on the link than just "click here" or "learn more" will help all of your users, whether they use an assistive device such as a screen reader or not, have a better understanding of the links on the page.

- Check every single link on the page to see if it not only works—but that it's actually going to the right page
- Links to non-case.edu URLs should open in a new tab or window
- Do not include carrots (>) or other styling after links
- Links should always be specific. Do not use link text such as "Click here" or "Learn more". Instead, use clear, descriptive text such as "See the upcoming schedule" or "Learn more about upcoming events".

[Learn more about using purposeful links.](#)

Buttons

- Remove carrots (>)
- Use Initial Cap (Get More Information) instead of all caps (GET MORE INFO) or Sentence cap (Get more information)

Tables

- Check your table has a header row or column added
- Tables should not contain images or decorative elements

Accordion Content

- Remove plus signs (+) at the end of accordions
- All accordions should have some kind of intro text, there shouldn't be pages with only accordions
- Accordions are for small pieces of searchable content. Large blocks of important content, images or tables should not be placed in accordions.

Images

- All images should be downloaded and added to the site either via embedding the image through the WYSIWYG editor, or the media library
- All images must have descriptive alternative text
- Do not upload images that have text within the image. If an image has any text in the image, all text must be included in the Alternative Text when uploading

[Learn more about accessible images.](#)

Headings

- Headings should always be in the correct order, and begin with H2s (Heading 2)
- Bold text should never be used in place of headings

For more information on using accessible headings, [please review page structure on the Accessibility website.](#)

[Learn how to add headings to your page.](#)

Spacing

- There should be no extra spacing between lines, only a standard return.

Navigation

- Website navigation should only link to internal pages within the site. Never link to external pages from the navigation.

Overall Content

- Ensure names are spelled correctly and titles are accurate
- Ensure dates and deadlines are updated
- Ensure contact information is correct
- Web users typically won't read large blocks of content; make sure to use white space and separate your paragraphs with headers and accessible images (see Images above)
- Keep in mind your primary audience when writing for your website (students, faculty, staff or community partners). Keep your content tailored mostly to them

Drupal Features and Options

Content Types

In Drupal, you'll find multiple different page types, also known as Content Types. This is how Drupal refers to the options for organizing and displaying your content.

Following is a quick primer on the most common types of pages you'll find on your site.

Homepage

There is only one homepage on each site, so you are not able to choose this type of page when creating new pages. You also can't delete this page from your site. However, you can edit all of the images and text on the homepage of your site.

[Learn more about homepages.](#)

Basic Page

The Basic Page lets you place text in a single block, embed images and add an optional aside. Anything you can do in a Microsoft Word or Google Doc, you can do on a Basic Page. However, because Robust 3-Column pages can do everything a Basic Page can do and more, some newer sites no longer have the option to add Basic Pages.

[Learn about the Basic Page.](#)

Robust 3-Column Page

The Robust 3-Column page has a number of display options you don't have on the Basic Page content type, such as Hero Images and Accordions. If you're looking to create a new page on your website, we recommend choosing the Robust 3-Column Page.

[Learn about the Robust 3-Column Page.](#)

Biography

Biographies are used to hold all profile content for any active faculty or staff here at the university.

[Learn more about Biographies.](#)

News Article

News Articles are used to display any news-worthy content on the site.

[Learn about News Articles.](#)

Event Detail Page

The Event Detail Page is used to display any events that are posted on the website.

[Learn more about the Event Detail Page.](#)

Additional Website Functionality

Your website also has additional features, such as the customized header and footer, as well as some additional functionality in the right sidebar of most pages.

Header and Footer

The header and footer of the website contain university branding, as well as your website's name and contact information.

[Learn more about your website's header and footer.](#)

Right Sidebar

The right sidebar on pages such as a Basic Page and Robust 3-Column Page allow for additional functionality, including buttons and Aside sections to call out important content.

[Learn more about right sidebars.](#)

Homepage

The homepage is the first page on the website a user will see. The homepage allows you to add a Hero Image or a Hero Image Slideshow. These images span the width of the page.

You can also add subfeatures. Subfeatures promote the most important content on your site. They link to the content with a button and are separated into columns. Some homepages also feature a sidebar for things such as calendars or contact information.

You may edit the homepage once logged in. You can edit the homepage by selecting it from the content overview menu in your dashboard. Or, you can begin by navigating to the live view of your homepage. Once there, select the Edit option above the hero image.

If you find the homepage on your website no longer fits your website's needs, please contact us by [submitting a help desk ticket](#).

[View different homepage styles](#).

Basic Page

A Basic Page consists of a main content section with a WYSIWYG and an Aside section on the right-hand side. You do not have the option to include a Hero Image on a Basic Page, but you do have the option to embed images into that WYSIWYG that have already been uploaded to the Media Library.

[Learn more about the WYSIWYG.](#)

A Basic Page is used for any pages on the website that are going to be generally text-based. Some of our newer sites do not have the option for a Basic Page since a [Robust 3-Column page](#) can do everything that a Basic Page can do, and more. We recommend creating any new pages on your website as Robust 3-Column pages to give you more flexibility with future edits on your pages if needed.

Robust 3-Column Page

The Robust 3-Column page has more options available than a Basic Page. We recommend any new pages on your website be created as a Robust 3-Column page instead of a Basic Page to allow for additional versatility when displaying your content.

What Can Be Used on a Robust 3-Column Page?

Hero Images

You can add up to five full-width Hero Images at the top of the page, but keep in mind: the more photos you add to a page, the longer it takes to load. For this reason, we recommend the hero image generally only be used on landing pages or pages in your top-level navigation.

Accordions

An accordion is a type of section that allows you to add content within collapsible headers—which open and close—on your site. **We recommend only using accordions sparingly, as they hide content at first glance to the site visitor;** FAQs are a good use case, as there usually is a lot of content that needs to be shared in one page and can be easily glanced through to find the answer a user is looking for.

In most cases, you'll find that dividing content up with headers will do. In the event you want to use an accordion, keep in mind that they are separate from the rest of your content and have their own [WYSIWYG \(What You See Is What You Get\) editor](#) when you create them.

[View an example of Accordions.](#)

External Feeds

External feeds are any feeds like Facebook or Google Calendar where an embed code may be used. External feeds are typically placed within the sidebar of the Robust 3-Column page, but can sometimes be included in the main section of the page as well.

Photo Galleries

Galleries display and cycle through multiple images. Typically, galleries contain images that share a similar theme. You should try to keep your galleries under five images, but may have up to seven. Each image should be no larger than 256kb.

Subfeatures

Subfeatures promote the most important content on your site and should be used to link to other internal pages on your website. They link to the content with a button and are separated into columns. Not all websites initially have the ability to add subfeatures. If you know your website will use subfeatures to link to internal pages and would like them added to your site, please contact us by [submitting a help desk ticket](#) to let us know and we will work with you to set this up.

Views

Views display content, such as Biographies, News Articles, or Events, in a listed format that updates automatically based on different parameters. **Views are created by web developers and not something website editors can set up by themselves.** If you would like a new view created to feature on the website, please contact us by [submitting a help desk ticket](#) to let us know and we will work with you to set this up.

Wells

Wells are used as a different styling element to call attention to something important on the page. While these are styled differently, they should be used sparingly throughout the website to help draw users' eyes to important content. [View an example of a Well.](#)

Adding New Content Sections to Your Page

To add a new content section to your page, follow these steps:

1. Go to the Edit screen
2. Under the Main Content tab, scroll to the bottom of your content
3. In the dropdown, select the new content section you would like to add.
4. This will add the new section to the bottom of your page

Updating the Order of Content on Your Page

If your page has more than one type of content area, you can rearrange the content by using a Drag and Drop functionality.

While on the Edit screen of your page, click the three-dotted icon at the top right of the tab, select 'Drag & Drop', and then rearrange your sections.

If you would like to update the order of content within a section, such as an Accordion or Subfeature section, click the six-dotted icon to the left of the section title and then drag & drop your content into your preferred order.

You can also delete a content section completely by selecting the Remove button in the top right-hand corner of each content section.

Adding a Page to the Navigation

After creating a page, your next step should be to decide where this content will live in the navigation so users can find it.

All pages on your site should have a place in your navigation. To place the page within the navigation on your site, use the Menu Settings dropdown on the right-hand side of your screen.

[Learn more about adding new pages.](#)

News Article

The News Article content type is a templated content type used to display items like announcements or news articles on the website. News Articles aren't initially turned on for most websites. If you know your website will use News Articles and would like them added to your site, please contact us by [submitting a help desk ticket](#) to let us know and we will work with you to set this up.

Creating a News Article

To create a news article, please go to **Content > Add Content > News Article**.

Make sure to provide a menu link for all news articles. This will ensure that breadcrumbs and the URL are both set up properly. For more information on nesting pages, please review our [Adjusting Page Names or Page Order page](#).

Tip: If you publish a news article and you see the URL ends in a /node/### that is a sign your article is not nested. Please follow the "Before you hit Publish" instructions below.

Image Tab

You can choose an image from your Media Library or upload a new image. When an image is added to the Image tab, the image will appear in the upper right-hand corner of the article and will be the preview image for the article used in a view. Drupal will automatically crop the image to fit into the square space. This space is formatted and the size cannot be changed. [Review how to add or update media](#).

Content Tab

Article Date

You can add the date an article was originally published. For example, if an article was supposed to be published a month ago, you have the ability to backdate the article to that date. A view will also be set up to display news articles chronologically based on the article date, **so please make sure this date is accurate**.

Article Summary

An Article Summary is used to give a short preview of the article to a user. The summary will only be present on the news article view and not on the news article itself. You can access the article summary by clicking on the 'Edit Summary' link by the Content header. The summary field is a plain text field, so you can only add in text.

We strongly recommend utilizing the summary to offer a preview of the article so you can control the text shown in the view. If a summary is not provided, the first 100 characters will be shown in the page view.

Article Link

If you would like to provide a link to an external source, such as to [The Daily](#) or to another news outlet, you can use the Article Link section to do so.

Make sure to use descriptive link text to explain to a user where the link is taking them. For more information on descriptive link text, please review our page on [web writing](#).

Before You Hit Publish

Before publishing your news article, it's important to nest the article in your navigation. We talk about this process on the [Adding New Pages](#) page. This is the process of choosing where in your navigation the news articles will live. Typically, news articles are nested under a Robust 3-Column page called "News" or "Updates" etc. If you already have this page created, please follow the steps in the Adding New Pages instructions for nesting your article before you hit publish so that your news article has a proper URL path and breadcrumbs. Once the page has been published, [remove the page from the navigation](#).

For questions or help with your news articles please email help@case.edu.

Events

The Event Detail Page content type is a templated content type used to display events on the website. Event Detail Pages aren't initially turned on for most websites. If you know your website will use this event content type and would like them added to your site, please contact us by [submitting a help desk ticket](#) to let us know and we will work with you to set this up.

Creating an Event Detail Page

To create a news article, please go to **Content > Add Content > Event Detail Page**.

Make sure to provide a menu link for all news articles. This will ensure that breadcrumbs and the URL are both set up properly. For more information on nesting pages, please review our [Adjusting Page Names or Page Order page](#).

Tip: If you publish an event and you see the URL ends in a /node/### that is a sign your page is not nested. Please follow the "Before you hit Publish" instructions below.

Event Image

You can choose an image from your Media Library or upload a new image. When an image is added to the Image section, the image will appear in the upper right-hand corner of the article and will be the preview image for the article used in a view. Drupal will automatically crop the image to fit into the square space. This space is formatted and the size cannot be changed. [Review how to add or update media](#).

Event Date Range

You can add the date and time an event will both start and stop on. A view will also be set up to display events chronologically based on when the event takes place, so please make sure this information is accurate.

Event Description

If you would like to provide a description for your event that will appear on the event's individual page, such as more information about where the event takes place, payment information, or anything else that can help describe your event, that information should be included in this field.

Summary Field

A Summary is used to give a short preview of the event to a user. The summary will only be present on the events view and not on the event page itself. You can access the summary by clicking on the 'Edit Summary' link by the Content header. The summary field is a plain text field, so you can only add in text.

We strongly recommend utilizing the summary to offer a preview of the event so you can control the text shown in the view. If a summary is not provided, the first 100 characters will be shown in the page view.

Event URL

If you would like to provide a link to an external source, such as to the CWRU Athletics site or to another website, you can use the Event URL section to do so.

Make sure to use descriptive link text to explain to a user where the link is taking them. For more information on descriptive link text, please review our page on [web writing](#).

Tags

If events are set up on your site to display in multiple places based on a specific keyword or tag, you can include the required tag in this section. If an event should have multiple tags, please add a second tag by clicking the "Add another item" button at the bottom of the Tags section.

Not all websites have Event Tags set up. If your site does not have Event Tags, you can ignore this field.

Before You Hit Publish

Before publishing your event, it's important to nest the event in your navigation. We talk about this process on the [Adding New Pages](#) page. This is the process of choosing where in your navigation the event will live. Typically, events are nested under a Robust 3-Column page called "Events" or similar. If you already have this page created, please follow the steps in the Adding New Pages instructions for nesting your event before you hit publish so that your event has a proper URL path and breadcrumbs. Once the page has been published, [remove the page from the navigation](#).

For questions or help with your events please email help@case.edu.

Biographies

Who Gets a Biography?

While we fully support the interdisciplinary and cross-organization efforts taking place across our campus, our Biographies section is meant to store information about current Case Western Reserve University faculty and staff. Other key players on your teams, such as undergraduate students or temporary researchers, certainly can and should be highlighted on your website, but this information should be created as regular pages rather than added to Biographies.

In addition, if an individual from an external organization has an outside profile, please link to this instead of creating a page for them on Case Western Reserve's website, so information only needs to be maintained in one place (at their primary institution).

It's important to remember that biographies are not stored/edited on the individual department/school websites (School of Medicine, Sears think[box], etc.). Instead, they are stored in a hub and synced out to the sites that they are tagged on.

This way, one biography can appear on multiple sites but only has to be edited in one place.

As an editor, you have access to this hub and can make the following changes to biographies:

- Edit any information on an already existing biography
- Add a new biography to the system

Because biographies can appear on multiple sites, as an editor you do not have access to:

- Delete or unpublish a biography
- Place a biography on your site in a specific order or on a specific section

To remove a biography from your website, please reach out to help@case.edu and give us the name of the person you need to be removed and details of whether they have just transferred departments or left the university.

Editing Biographies

Edit An Existing Biography

When **logged into your site**, go to Content > Add Content > Biographies - Content Hub. This will open up the biographies site in a separate tab.

Within that tab, you can search for the biography you want to edit. You can do this in two ways.

1. Either type part of their last name and click filter, or
2. Filter by your website to see all of the biographies listed there until you find the one you're looking for.

Once you find the bio you want to edit, please click on their name and their biography will appear. From there you click on the "Edit" tab. **Remember** - you're doing all of this on the Biographies website (you'll see this in the top banner), not on your individual website. Once the biography is saved on the Biographies website, any edits that you make will appear on your individual website.

If you want to make a change, such as changing a title, now you can make that change within their profile. **Please be sure that if making a change to a category that has a number after it (such as a title) you are erasing the numbers as well as the letters.** This clears the entire selection so you can input a new title.

Once you are finished, scroll to the bottom and Publish your changes. This will publish your changes to your website within a matter of minutes. If your changes do not appear after 10 minutes, please email help@case.edu and let them know.

Create a New Biography

When logged into your site, go to Content > Add Content > Biographies - Content Hub. This will open up the Biographies site in a separate tab.

Please do a quick search to ensure that the biography you are looking to create hasn't already been added. Even if the faculty member is new, another department may

have already created the biography. You can search for a partial of their last name in the “Name” section to see if their biography appears.

If their bio doesn’t appear when searching by last name, you can create a new biography. To do this, choose the “Add Content” button above the filtering section. This will bring up a blank biography page for you to fill in.

Once you have filled in the information for the biography, you can tag it to appear on your website. To do this, go to the “Website Bio Should Appear On” section in the Main Details tab and add the name of your site (*for example*) “Case Comprehensive Cancer Center” - this selection should auto-populate once you start typing.

Once you are finished, scroll to the bottom and Publish your changes. This will publish your changes to your website within a matter of minutes. If your changes do not appear after 10 minutes, please email help@case.edu and let them know.

Reminders When Working With Biographies

- Please fill in their Full Name where it says “Full Name” including the middle initial if they have provided it.
- Certain fields, like “Academic Credentials” will already have pre-filled selections for you to choose from. If they do, please choose the correct option from the drop-down.
- To add more than one item to a pre-filled selection field, such as for Academic Credentials, add a comma to separate the entries. If you don’t see the academic credential you need, please reach out to help@case.edu.
- **You will never need to use the tabs on the right-hand side (Menu Settings, Content Cloud, etc.) while working in Biographies.**

Additional Biography Fields

From research interests to past awards, Biographies have many fields to accommodate the information a faculty or staff member would like to add to their bio. Learn more about what you can include and how to format this information.

Full Name

The Full Name field, or the first field with the red asterisk, is for the person's full name.

Please do not include their academic credentials or any other information aside from their full name in this field.

Main Details

This is where you will fill out the biographical information for each person such as academic credentials, job title and contact information. You can also provide a profile picture.

Website Bio Should Appear On

This field will need to be filled out with your website's name if the bio you are editing hasn't existed on your website before. If there is already a site name in this field, put a comma after the entry, start typing your site's name, and select it from the dropdown when it appears. This will make sure that the biography you are editing will be added to your site.

Job Titles

When changing a job title, please be sure to delete the entire title—including the number in parentheses after the words—to ensure the title updates properly when saved.

Faculty

If someone is a professor of biomedical engineering, pathology, and radiology, all of which are in the School of Medicine; director of a center; and member of a different center their title should be input as follows:

- Professor, Department of X, School of Medicine
- Professor, Department of Y, School of Medicine
- Professor, Department of Z, School of Medicine
- Director, Center for ABC
- Member, Center for DEF

NOT "Professor of Radiology, Department of Radiology, School of Medicine" or "Professor of Radiology, School of Medicine."

This allows us to make sure that when we have faculty who have cross-school affiliations—such as nursing and medicine—we can clearly see their school affiliation.

If they are a faculty member who has multiple titles within one department, such as "Professor and Chair, Department of Pathology, School of Medicine" put both of their titles (separated by "and") in the one title field, rather than separating them out. There will only be a few of these, so they are the exceptions to the rule.

There will be some faculty members with endowed professorships, such as "Ann Smith, the Bill Gates Professor of Technology." Those must be input as they are. DO NOT change them, but add the department and school name.

Staff

For staff members, you'll likely need to add a bit more detail on titles.

For example, someone may be a director—but their office may have multiple directors. So you'd need to say "Director of X" and "Director of Y" for those individuals to fully clarify their roles.

Job Descriptions

If this person only appears on one site, fill out the Job Description field with information about their appointment/role within the university.

Secondary Job description can be used to pull in information for those who appear on multiple sites.

Teaching Information

Sections for schedule, information and office hours are provided with the standard WYSIWYG format.

Research Information

Include information about interests, current or past projects and funding in the appropriate sections.

Awards and Honors

Select Add Awards/Honors to add information including the award name, the year received and the organization or sponsor of the award.

Professional Memberships

List any professional memberships, entering one at a time. To add multiple select "Add another item."

External Appointments

The title/department/center/school section should only be used for CWRU positions. If it's a position at another university or an outside company or organization, such as University Hospitals, Cleveland Clinic, Louis Stokes VA Medical Center or an outside company, this information should go under the External Appointments tab.

Publications

Links to PubMed and other external publications go here.

Presentations

Use the Presentation field to fill out a Title, Conference/Event name and presentation date. Or input the information in the WYSIWYG editor below.

Education

Use this tab to fill out specific information on types of degrees received, year of graduation and other college/university information. Be sure to spell out the degree in the Degree field. Rather than it saying BS, it should say Bachelor of Science, etc.

If they have a certificate they earned from a university that relates to their area of expertise also include that in Education.

Residencies, Internships and Fellowships

This tab can be used for information regarding residencies, fellowships and internships. You can provide an Area of Study/Specialization, Institution and Year.

Additional Information

Any information that doesn't directly relate to the person's job or biography such as interests, history at the university or information about other roles will go in this tab.

Developer Use Only

This section is used to help place a biography on a specific page or in a specific order.

Please note this section is reserved for Drupal developers only. If you need to place a biography in a particular order on a web page or if a biography is not displaying properly, please let us know by emailing help@case.edu or by [submitting a help desk ticket](#). **Do not attempt to update this section on your own, as it could result in making changes to websites other than your own.**

Documents

You may want to link to a document such as a resume or CV in a biography. To do this, you'll need to upload the document on the site where the biography will appear. Do not upload the document into the Biographies site. For help with uploading documents, see our Uploading New Media section on the WCMS site.

Once you've uploaded the document:

- Click on the document in the media library, so that it opens in your Drupal site
- Copy the URL that appears
- Open the Biographies site and locate the biography you would like to edit
- Choose New Draft
- Highlight the text you would like to link to the document, use the Link button in the WYSIWYG editor, paste the link to the document

Add a Biography to the Navigation

While all biographies exist in the Biographies website, oftentimes biographies appear on more than one website. Since every website has a different navigation structure, **biographies need to be added to the navigation on your website, and not on the Biographies website.**

When logged into your website, navigate to the Content Overview page and search for the biography you'd like to add to the navigation. Once you find the bio you'd like to add,

please click on their name and their biography will appear. From there you click on the "Edit" tab. **Please note this is the only time you'll edit a biography on your website instead of the Biographies website.**

On the editing screen, edit the Menu Settings information on the right-hand side. For step-by-step instructions on how to add pages to the navigation, please review [Adding a Page to the Navigation](#).

Once the biography has been added to the navigation, we recommend disabling it from the nav. This will allow the biography to keep the proper URL and breadcrumb structure while visibly removing it from the navigation in order to keep the navigation easy for users to use. For information on how to do this, please review [how to remove a page from the navigation](#).

Right Sidebars

Sidebars are found on Basic Pages, Robust 3-Column pages, and Homepage with Sidebar homepages. A sidebar allows you to highlight information such as important upcoming dates or contact information.

Buttons

Sidebars allow you to use buttons to quickly link out to other important places on your website, such as to event calendars or additional resources for your users. Buttons can be standalone buttons or listed in groups, called Stacked Buttons.

Aside Sections

Aside sections are used when you have important information, such as a location or contact info, an important notice, or other information that needs to be displayed prominently but needs more information than just a link to learn more. Aside sections allow for an image, title, text, and a button.

External Feeds

External feeds are typically only included on a Robust 3-Column or homepage. External feeds allow you to link to different news or events feeds, such as to Campus Groups, a shared Google Calendar, or to pull in news articles from The Daily. External feeds can sometimes include a social media feed from Facebook.

Updating the Order of Sidebar Content on Your Page

If your page has more than one type of content area, you can rearrange the content by using a Drag and Drop functionality.

While on the Edit screen of your page, click the three-dotted icon at the top right of the tab, select 'Drag & Drop', and then rearrange your sections.

If you would like to update the order of content within a section, such as an Accordion or Subfeature section, click the six-dotted icon to the left of the section title and then drag & drop your content into your preferred order.

You can also delete a sidebar section completely by selecting the Remove button in the top right-hand corner of each sidebar section.

Header and Footer

The header and footer of your website are custom to your site and will appear on every page of your website. These areas are branded to match University styling, and the looks of these areas cannot change. If content changes need to be made to the header or footer of your website, such as if your campus location changes or your site name needs to be updated, please contact us by [submitting a help desk ticket](#) to let us know what needs to be revised and we can assist you with the updates.

Header

The header is located at the top of your website and contains the Case Western Reserve University logo, as well as the website's name. If the website is located within a specific school or unit, the school or unit name will also appear in the header. Beneath the header is your website's navigation. [Learn more about your website's navigation.](#)

Footer

The footer is located at the bottom of your website. This is where your campus location, mailing address, and contact information is held. If there are social media accounts you would like to feature, these will be highlighted in the footer area of the website as well. The footer also contains mandatory legal notices and other important information regarding all Case Western Reserve University websites.

Publishing Options

We recommend to save your work within Drupal often, as **Drupal does not have an automatic publishing feature**. With this in mind, there are a handful of different publishing options available to you when working with your pages.

- Save Draft: Creates a draft of the page that is not live on the site which can be published later. If the page was previously published, the published version of the page will stay active for any users coming to your website.
- Publish: Publishes the new page to the website.
- Unpublish: Removes the page from view and creates a 403 error: Access Denied for anyone without editing permissions who tries to view the page.
- Delete: **Permanently** removes the content from the website.

Note: There is no recycle bin in Drupal. Once a page is deleted, it is gone forever.

Please be certain you are ready to delete content before clicking the Delete button.