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*If you think of something that would be helpful for other to know (or something you would like to know), please contact FMBAS so it can add to this document.*
Known Issues / Important Stuff

Who are FM’s Site Administrators
Currently, this is Christie Wells

Don’t Change anything in the Moderate Section
When you are logged in to Drupal and viewing a webpage / node, you will have access to the Moderate tab.

View published  New draft  Moderate

This tab should **ONLY** be used to view notes users have added (in Log message for this state change) when making edits to that page.

While in the Revisions section, if a user changes the state of a page or deletes a page (or revision), this can cause many issues (including the un-publishing of a page).

⚠️ The revision highlighted in green is the version which is currently viewable by the public. If there is no revision highlighted, this page (and the associated menu link) will not be available to the public.

Naming Files Prior to Upload
It is VERY important to following the naming convention for files you plan to upload to Drupal. If this convention is not followed, it can cause many issues with how that files is displayed or handled by Drupal. For more details on the standard, click here.

*** When replacing an existing file on the website, the filenames MUST be exactly the same ***

Once Assigned, Don’t Change the path slug value
The path slug value is used to create the webpage’s address and the address of any child page.

![Path slug input field](image)

Most of FM’s webpage addresses are created using the following logic:  https://main site address / parent page’s path slug / page’s path slug. FYI: When Drupal uses the value in the path slug field to create the address, it makes the value all lower case and replaces spaces with dashes.

Once the page is created and published, changing the path slug value could cause the following issues:

- **Redirects loops:** With this issue, the redirect could cause a looping issue and make the page unavailable to the user trying to view the page. **Click here** to see the error message and what to do to get this issue corrected.

- **Breaks links / bookmarks:** When you change the path slug value, it changes the web address for both the current page and any child pages. This could break user’s bookmarks or links from other websites pointing to FM pages.

**Example:** For the Central Services page, the path slug value for that page is: **Central Services**. The parent (defined by the menu structure) for the Central Services page is the About Facilities Management page (its path slug is About FM).

**The webpage address would then be (for this page once in production):** https://facm.umn.edu/about-fm/central-services
When creating content, ALWAYS do this before publishing the Page

When creating a new page, the page MUST be assigned to part of the menu structure. If this is not done BEFORE the page is published, there will be issues with how the page’s URL is set. **You MUST contact a FM site administrator to assign your new page to the menu structure BEFORE it is published.**

**IMPORTANT NOTES**

- New pages added to the menu structure will not show up on the menu until the page is published.
- All pages MUST be assigned to the menu structure. Let FM’s site administrator know if you do not want it to show up on the main menu.
- Content created using the Memo, News, Recognition, or Staff content types do NOT need to be assigned to the menu structures. Only pages created using the Common page and Landing Page contents types need to be assigned.

**Why Can’t People See the Page I Just Published (says they're not authorized)?**

After the Drupal upgrade (fall of 2016), our website sometimes tells general users (users who are not logged in) that they are not authorized to view a specific page. This occur occasionally when updates are made to a page and published. So when you are making changes to a page make sure to view that newly updated page in another browser where you are NOT logged in. If you can view the page, all is well. If you are given the message that you’re not authorized to view the page, you will need to republish it.

**Steps to republish (while logged into Drupal):**

1. View the page
2. Click on new draft
3. Scroll to the bottom of the page and click on the Publishing options section.
4. Change the Moderation State to Published
5. Click save (on bottom left-hand part of window)
6. Check to see if someone else can view the page. If not, redo steps 1 - 5 again. If they still cannot see the page, let me know and I will fix it.
When editing a page, always add notes

When you make a change to a page/node, add a brief message in the “Log message for this state change” regarding the edit you made. This field is accessible on the Publishing options section at the bottom of the page.

Why can’t I see a file I know is in the system?

Currently, there is an issue with certain files not showing up on the My Workbench / FILE LIST tab. This issue has been sent to OIT to resolve. Once resolved this document will be updated.

Until this is resolved, you will need to do the following:

- **Editors**: Will need to contact their Senior Editors to make the change to the file.
- **Senior Editors**: Go to your shortcuts menu and select “Find Content”. Then click on the FILES tab. Here you should be able to see all files. From here you can also update these files.

Basic Navigation / Access

Logging In

1. Go to the following site:  [https://facm.umn.edu/login](https://facm.umn.edu/login)
2. Log in using your internet ID and password.
3. After logging in, the system should bring you to the following screen.

   ![Administrator tool bar image](image-url)
Using “My Workbench”

Finding Your Webpages
1. Click on My Workbench (under your Shortcuts menu)
2. Click on the All Recent Content button on the right-hand side (under NEEDS REVIEW tab)
3. Enter in all (or part) of your group’s name in the Group field (see screen shot below)
4. Then click the Apply button.

Finding Webpages Which Need Review
1. Click on My Workbench (under your Shortcuts menu)
2. Click on the NEEDS REVIEW tab.
3. Enter all (or part) of your group’s name. (In the example below, the user is looking for Central Services)
4. Click the Apply button.

Finding Your Files (documents, images, etc.)
1. Click on My Workbench (under your Shortcuts menu)
2. Click on the FILE LIST tab.
3. Enter all (or part) of the filename you trying to find and/or the upload user’s name (login id). (In the example below, the user is looking for a file where “july” is part of the name and was uploaded by hellerj)
4. Click the Apply button.

There is a known issue with finding curtain files. So if you can’t find your file, reading the “Why can’t I see a file I know is in the system?” section.
Adding and Managing Files (images, PDF, word, etc.)

Uploading New Files

The following is a way to directly upload a file in to Drupal (while NOT in a node / webpage)

1. **Naming Standards for uploaded files / documents.** Before uploading a document in to the FM Drupal site, make sure the following naming convention was followed.
   - Filenames should be meaningful
   - All characters in the filename should be lowercase
   - Only use dashes “-” to separated words (never user underscores “_”)
   - There should be NO spaces (or strange characters) used in the file name
   - *Examples of good filenames: equip-data-form-ups, fy2015-rates, landcare-sla*

2. In the FM Drupal site, go to “My Workbench”

3. Click on the **CREATE CONTENT** tab (located in upper right-hand corner)

4. Click **Upload Media** (under the Create media section at top of page)

5. Click on the Choose File button

6. Select the document you want to upload. Then, click Open (this brings the file to the Drupal site)

7. Click the Upload button

8. Click the Next button

9. Click the Next button again (Make sure to leave the Public local files served by the webserver selected)

10. Leave the document title, publication date, and document type fields blank.
    - These fields are only used when uploading a file specifically for the BRIDGE group or Pipeline pages.

11. Click the Save button.
Replacing / Updating existing Files

1. In the FM Drupal site, go to “My Workbench”

   Note: if you can’t find your file in the “My Workbench” section you will need to find it under the content section. Click here to see information on this issue.

2. Click on the FILE LIST tab.

3. Click on the file name for the file you would like to replace.

4. Click on the Edit tab.

5. Under the Replace file section, click on the Choose File button. This will send you to your local computer’s network / drives so you can select you file.

   ![Choose File](image)

   Before replacing the file on the site, make sure your new file’s filename is EXACTLY (including the case) the same as the file is listed on the FM website.

   EXAMPLE: To the left is an example of a file name. If replacement file you are uploading are named like any of the following, the replacement will NOT work:

   Key-Hierarchy.pdf, key-hierarchy-new.pdf, keyhierarchy.pdf

6. Select your file (by double-clicking on the file or click on the file and then click the Open / OK button). This should bring you back to the Drupal site and list the new files name next to the Choose File button.

7. Scroll towards the bottom of the screen to the Revision notes section. In this section add notes to the date the file was updated and why.

8. Then click the Save button.

   You can only replace a file with a file of the same type. (e.g. a jpeg file could NOT be replaced with a gif file)
Content Management (creating / maintaining your webpages)

Creating New page (Content)
The following steps are the basic steps for creating a new page (or piece of content):

1. In the FM Drupal site, go to “My Workbench”
2. Click on the CREATE CONTENT tab (located in upper right-hand corner)
3. Click Common page (under content section) – *some users will have access to create other types of content*
4. Enter in a title for your page (this is the main header of the page)
5. Enter in a value for the path slug.
6. This field is used to help create the URL for your page.
7. Make sure to keep it short (one to two words) but descriptive (e.g. central services, districts, sales policies).
8. Stay away from generic path slugs that might be a duplicate (e.g. you don’t want 3 pages under your area all called event).
9. Populate all other fields needed for your page (e.g. Hero image, body, right sidebar, etc.)
10. Make sure to assign your group (under the Group Audience section).

11. Assign the Moderation state. Click on the Publishing options section at the bottom of the page and select the appropriate “Moderation state” value.

   - **DO NOT** change this status to published, until it has been assigned to the menu structure. [Click here](#) for more details.

   *Every time you create new content OR updated existing content, the default moderation status is set to Draft.*

12. Click the Save button on the bottom of the page to save the new page (content) you just created.
Adding / Managing Links

Linking to an outside website / web address

The following are the steps to link text to a website outside of the FM domain.

1. Highlight the text you want to link.

2. Click on the Insert/Edit Link icon located to the right of the redo icon.

3. In the Link URL box, paste (or type in) the complete website

4. In the Target field, select “Open Link in a New Window”

5. Click on Insert button. At this point, the text you selected to link should be blue and underlined.

You can also link to an image by highlighting the image and following steps 2 – 5 above.
Linking to an email address

The following are the steps to link text to an email address.

1. Highlight the text you want to link.

2. Click on the Insert/Edit Link icon located to the right of the redo icon.

3. In the Link URL box, type in the following: mailto:email address

4. In the Target field, select “Open Link in a New Window”

5. Click on the Insert button. At this point, the text you selected to link should be blue and underlined.
Linking to an existing FM webpage or document

The following are the steps to link text to another FM webpage or document (already inside FM’s Drupal system). Click here to see the steps for uploading a document.

1. Highlight the text you want to link.

2. Click on the Link to Content (or Linkit) icon located to the left of the spell check icon.

3. In the box below Search for content, enter in part of the file or webpage name.

4. Select the correct file (or node – which are webpages)

5. Click on the > OPTIONS section, which will give you access to select the Target (which is the screen this link will display)

6. Click on the down arrow at the end of the Target box to make your selection
   - Linking to Document: Select “New window (_blank)”. This will ensure the document opens up in a new tab/window.
   - Linking to another FM webpage: Select “Same window (_self)”. This will ensure the webpage opens up in the current tab/window.

7. Click the Insert link button. At this point, the text you selected to link should be blue and underlined.

You can also link to an image by highlighting the image and following steps 2 – 7 above.
Removing a Link

The following are the steps to remove a link.

1. Click on the link you want to remove
2. Click on the Unlink icon

Obtaining the Link Address to access a Google Document

The following are the steps to obtain the link to a Google document to make it available on our website.

1. Open up your Google Drive and find the document you want to link to (share) on the website.
2. Open up your Google Document.
3. Click on blue share icon in upper right-hand corner.  
   *This will open up a Share with others box*
4. Click on “Get shareable link” text in upper right-hand corner.  This opens up a section which will provides the link address you’re going to use.

5. Determine the correct level of access.
   - The default setting is set to “Anyone at the University of Minnesota with the link can view”: this will require a user login with their interned ID and password before allowing them to view the document.  Anyone at the University would be able to view this document.
   - Making it viewable to everyone follow these steps:
     - Click the down arrow next to current setting
     - Click more (at bottom of screen).  This gives you access to the Link sharing form.
     - Click on the radio button next to “On – Anyone with the link”
     - Click the Save button.  This takes you back to the Share with others form.

6. Click on Copy Link box.
7. Now that you have the link / web address, following the steps for creating a link to a website.

Other helpful resources

- [Sharing Document via Link Google Drive (YouTube Video)](https://www.youtube.com/watch?v=dQw4w9WgXcQ)
Formatting Tips

Carriage Returns

- **Hard Carriage Return**: This is created by pressing the “Enter” key. This will be the most common way of creating a carriage return (or paragraph break). In our system, this method creates padding (or space) between paragraphs.
- **Soft Carriage Return**: This is created by pressing the “Shift” and “Enter” keys at the same time. In our system, this method would only need to be used when you do not want any padding (or space).

If the space between paragraphs (or list) doesn’t look exactly like you want it to, try experimenting with hard vs soft carriage returns.

Un-publishing a page (Content)

The following steps are the basic steps for un-publishing a page (or piece of content):

1. Navigate to the page you want to un-publish.
2. Click on the Edit Draft tab.
3. Scroll all the way down to the bottom section.
4. Click on Scheduling options.
5. Enter in the date and time you want the page unscheduled.
6. Click on the Publishing options section.
7. Add a note under the Log message for this stage change.
8. Go to the bottom of the page and click Save.

FYIs:

A process runs twice-a-day to look for items which need to be unscheduled.

To verify (the next day) that the page has been unpublished, check the revision tab on that page. You will notice that there should no longer be a row highlighted in green.
Information on Specific Fields or Sections

**Hero Image**

When you want to change a hero image on a page, make sure to always click the Remove button to add the new hero image to the page.

*If you click edit and then replace the file you are replacing that image throughout the entire site. If another user selected that image for their page, the image on their page will also be updated.*
Other Items

Frequently Asked Questions (FAQs)

Why is the email link not opening up an email in my email client?

This is mostly an IT issue. However, if you are using Google mail, then completing the steps below should correct the issue. If it doesn’t, you will need to call 1-HELP.

1. After you’ve log in to your G-mail account, look for a double-diamond icon in your address bar.

2. Click on this double-diamond icon.
3. Then select the Allow radio button and click the Done button.

If you do not see the double-diamond icon, you can do this from your setting section

1. From the menu, choose Settings (or Preferences, depending on your operating system)
2. At the bottoms of the Settings page, click Show advanced settings…
3. In the Privacy section, click the Content settings… button
4. In the Handlers section, click the Manage handlers… button.
5. In the mailto section, select mail.google.com from the dropdown list.
Error Messages

I got this “The page isn’t redirecting properly” message, what do I do?

If you get the message below, please contact Christie Wells and let her know which page you were trying to access.

Other Training / Help

I still have general questions on using Drupal, where can I get additional training / help?

- **lynda.com**: The University of Minnesota has a partnership with Lynda.com. Here, you can get free additional training and help on many different types of software (including Drupal).
  - Once at the site, click on the words “Log in”. Then, in the box under the “Log in through your organization or school” section, type in “umn.edu”. Next click Go.

- **z.umn.edu/drupal**: This is the University of Minnesota’s Drupal information site. Here you can link to on-line training, updates, discussion groups, etc.

I have a question specific to an FM webpage, where do I go?

**Preferred Methods**

- Go to BAS’s “Ask a Questions / Having Trouble?” page and post your question on the FM Application Q&A forum.

**Other Methods**

- Email fmbas@umn.edu with the specific webpage and question.