

GENESIS **USER GUIDE**

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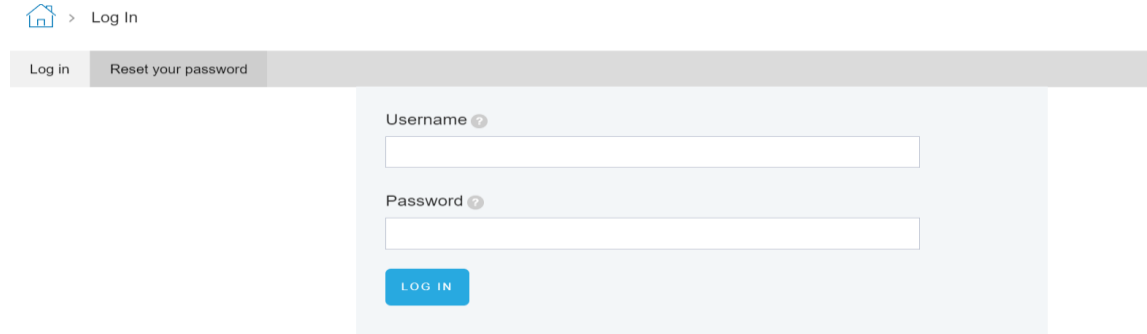
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1. Logging into Drupal Website

1.1. Go to Genesis website by accessing <http://genesishcsdev.prod.acquia-sites.com/>

Following is screenshot of login page.

Figure 1-1 Login page



The screenshot shows the login page of the Genesis website. At the top, there are two tabs: 'Log in' (selected) and 'Reset your password'. Below the tabs is a light blue form box containing two input fields: 'Username' and 'Password'. Below the 'Password' field is a blue button labeled 'LOG IN'.

1.2. Enter **Username**, **Password**, and then click on **Login** button to login to the site.

1.3. **Reset Your Password** – Enter Username or email address to receive instructions on resetting password.

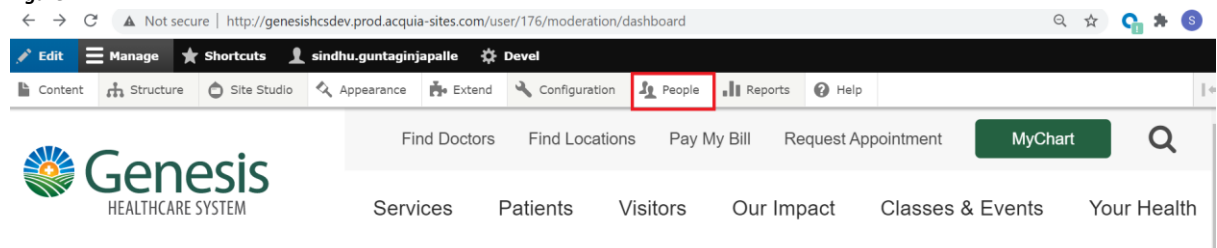
NOTE: Password reset email may go to spam email folder as sender address will be no-reply@acquia.com.

2. User Accounts

2.1. Creating & Editing User Accounts

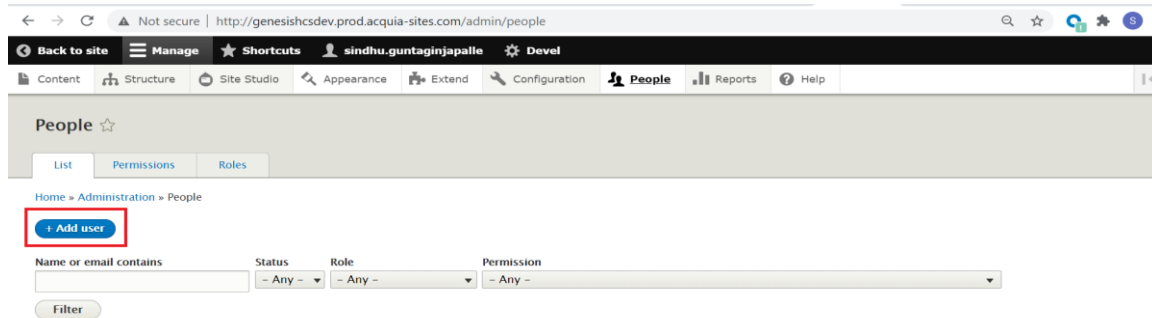
2.1.1. Click on **People** menu option highlighted in below screenshot

Figure 2-1-1



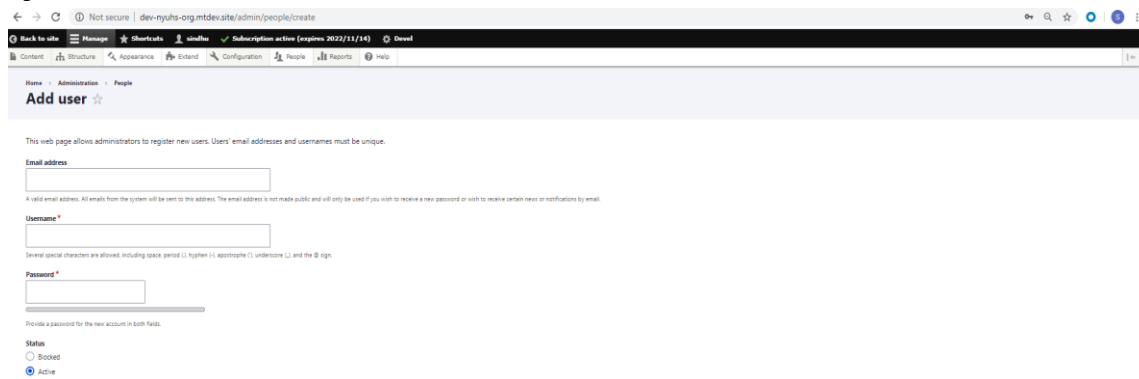
2.1.2. Add a new user account by clicking on **“Add user”** button.

Figure 2-1-2



- 2.1.3. For creating new User account enter details for **Email Address** (unique), **Username** (unique), and **Password** fields. Other fields, such as **Status**, **Roles**, **Time zone**, and **URL alias** may be edited. When complete, click the **“Create new account”** button.

Figure 2-1-3

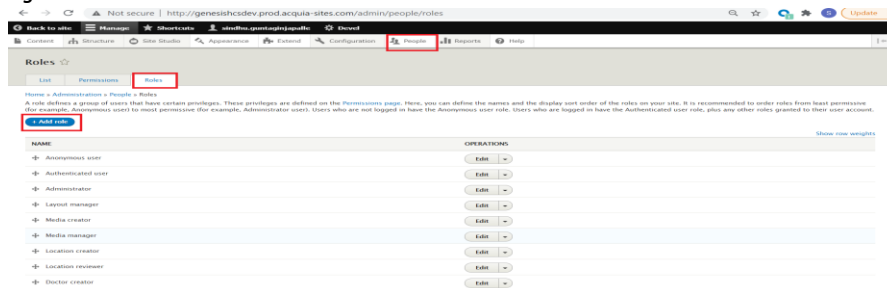


- 2.1.4 Edit existing user accounts by clicking on **Edit** button for the account and edit the desired fields.

2.2. Create New Roles & Update Role Permissions

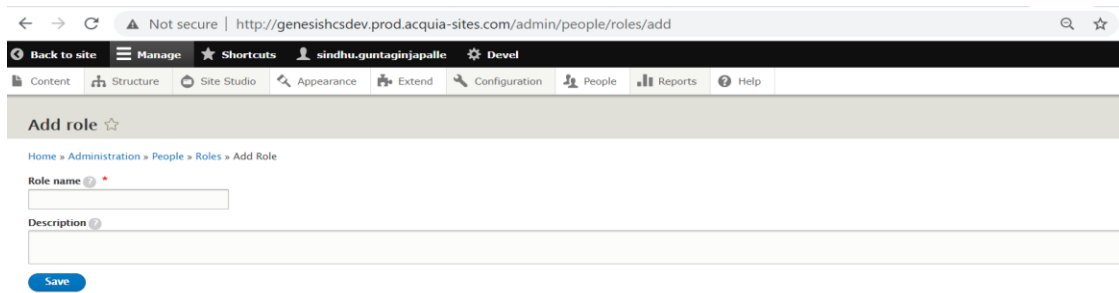
- 2.2.1. Click on the **People** menu option and then click on the **Roles** tab.
- 2.2.2. Click on **Add role** button.

Figure 2-2-2



- 2.2.3. Fill in the **Role name** and **Description** (optional) fields, then click **Save**.

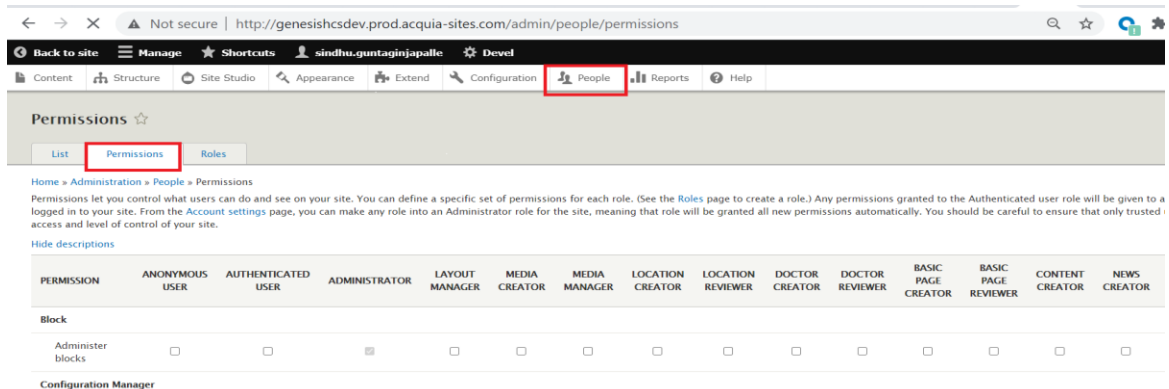
Figure 2-2-3



2.2.4. Click on the Permissions tab within People.

2.2.5. Go through the list of permissions and check the box for the permissions that the role should have. When finished, Click **Save Permissions** button at the bottom of the screen.

Figure 2-2-5



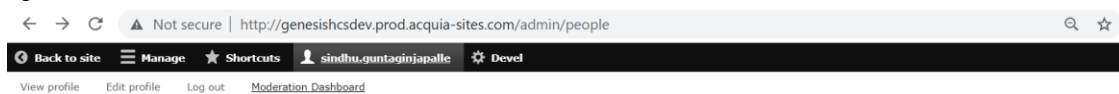
2.2.6. The new role can then be added to a user’s account

2.3. Admin Dashboard

2.3.1. Clicking on User account name, following options are available

- **View Profile** – View user profile
- **Edit Profile** – Edit user profile
- **Log out** – Logout from the application
- **Moderation Dashboard** – Dashboard to view the assigned tasks and content related activities

Figure 2-3-1



2.3.2. Selecting Moderation Dashboard, following admin task bar options are listed which may vary depending on roles

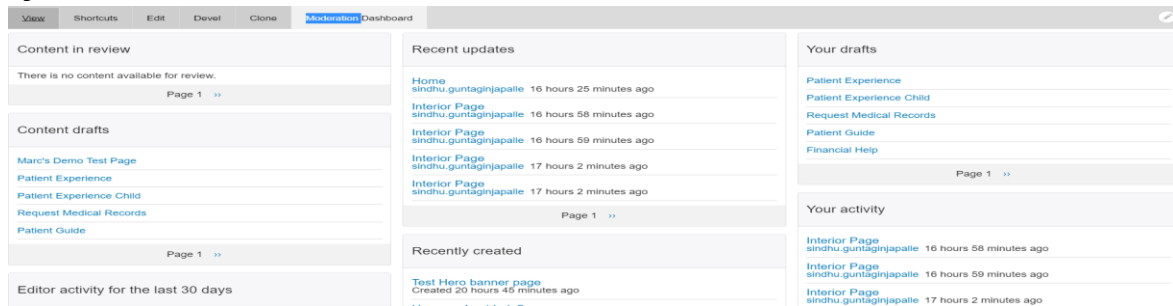
- **Edit**
- **Submissions**
- **Registrations**
- **Devel**
- **Moderation Dashboard**

2.3.3 Moderation Dashboard View for Admin contains following blocks

- **Content in Review**
- **Content in Drafts**
- **Editing Activity for last 30 days**
- **Recent Updates**
- **Recently Created**
- **Your drafts**
- **Your Activity**
- **Content you created**

Within the dashboard using the edit options against each option, content can be edited.

Figure 2-3-2



NOTE: Depending upon the Roles and Permissions the Operations i.e. Create, Edit, Delete, View etc. on Content Vary

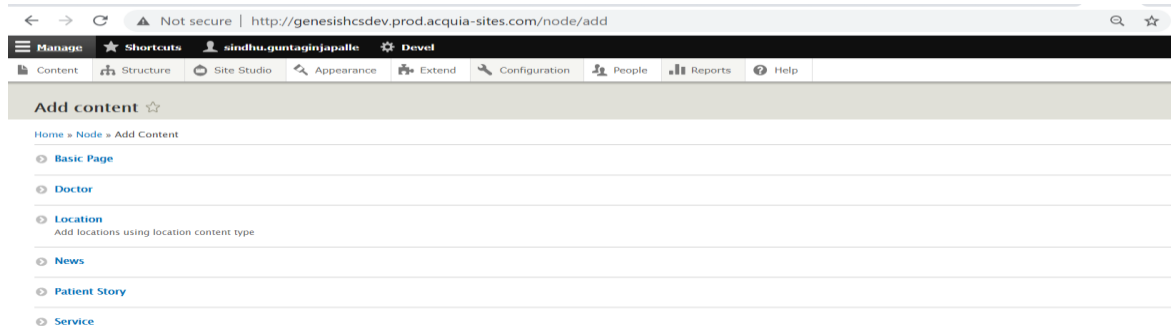
3. Content Types

3.1. Exploring Different Content Types

Following are the Content types which are available. Genesis site's content types are in bold font.

- **Basic Page** – Used for standard inner pages, such as About Us and Patients & Visitors
- **Doctor** - Used for the Providers section and functionality (Providers Search, Related Providers etc.) on the site
- **Location** - Used for the Locations section and functionality (Locations Search, Related Location etc.) on the site
- **Services** - Used for the Services section and functionality (Services Search) on the site
- **News** - Used for the News section and functionality (News Search, Related News, etc.) on the site
- **Patient Stories** – Used for Patient stories section and functionality (Patients Search, Related News) on the site

Figure 3-1

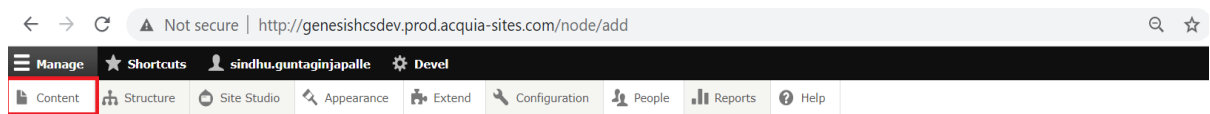


NOTE: Based on your website, the list of content types you see may differ.

3.2. Editing and Creating Content

- 3.2.1. Click Content menu option highlighted below in screenshot.

Figure 3-2-1

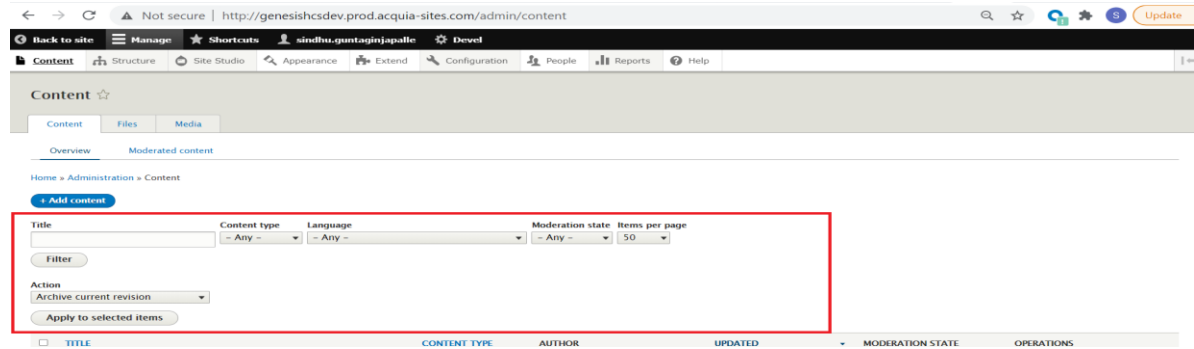


- 3.2.2. To search for existing content, use search field filters shown below to list pages by page title and content type.

Figure 3-2-2

- 3.2.3. When desired page is found by Search filters, click on the Link under Title column to view the front-end view of the page, or click on Edit button under Operations column to view and edit the back end.

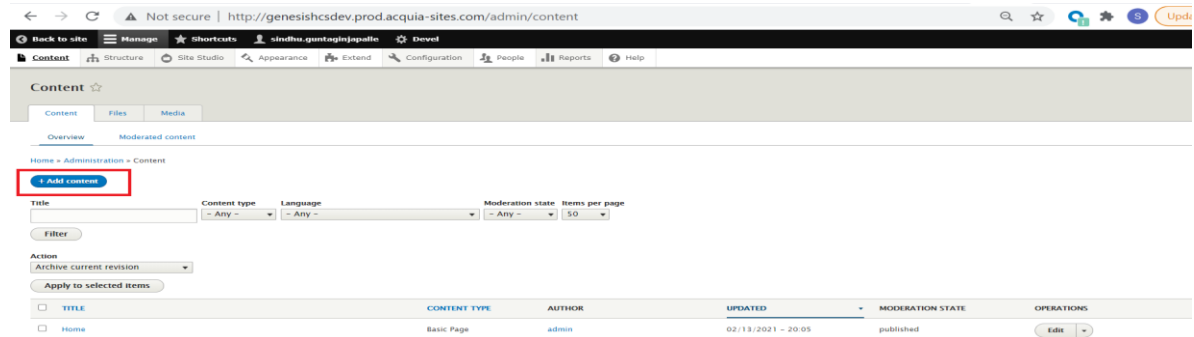
Figure 3-2-3



NOTE: Existing content may also be deleted by selecting the Delete option in the Edit dropdown for a page. However, if an item is deleted, it is permanently deleted and there is no way to recover it; therefore, it is recommended that pages are not deleted, but instead archived.

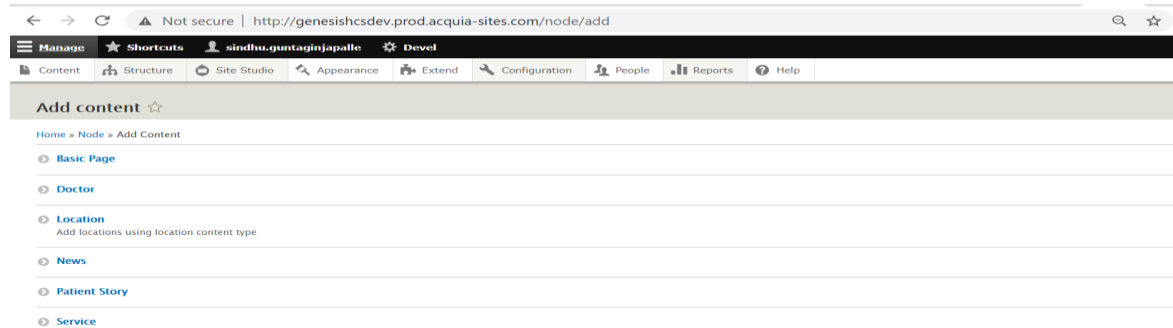
- 3.2.4. Add new content to the site by clicking the **Add content** button.

Figure 3-2-4



- 3.2.5. Then choose the type of content from the list of content types.

Figure 3-2-5



3.2.6. Within the new page, edit all desired fields.

3.3. Doctor Content Type

To add a Provider content, navigate to **Content** → **Add Content** → **Doctor**. This will take you to Create Doctor page which has following fields

- **Doctor ID**
- **Client ID**
- **NPI**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Gender**
- **Professional Titles**
- **Image**
- **Languages**
- **Email Address**
- **Office Phone**
- **Alternate Phone**
- **Show Phone**
- **Fax**
- **Location** - Dropdown typeahead input field which lists selections from location Content.
- **About**
- **Specialties** – Dropdown typeahead input field which lists selections from taxonomy vocabulary “specialties”.

- *Year Joined as Staff*
- *Year Began Practicing*
- *Year Began Specialty*
- *Medical Education*
- *Internship*
- *Residency*
- *Fellowship*
- *Areas of Interest*
- *What People are saying*
- *Board Certifications*
- *Teaching Positions*
- *Professional Memberships*
- *Honors and Awards*
- *Office Hours*
- *Hours Comments*
- *Accepting New Patients*
- *Is Referral required*
- *Online Scheduling*
- *Request an appointment*
- *Genesis Medical Group*
- *Group Practice*
- *Video*
- *Website*

After entering values into above fields save the content. Content can be saved in either draft, In review, Published or Archived state.

Searchable fields for Provider Content are as follows

- ***Doctors Name*** – Dropdown Typeahead drop down list field
- ***Specialty*** – Dropdown field with list of services
- ***City*** – Dropdown field with list of Cities
- ***Gender*** – Dropdown field with list of Gender
- ***Languages*** – Dropdown field with list of Languages
- ***Online Scheduling*** – Check box field
- ***Only show Genesis Medical Group Doctors***

Doctor Search Page URL: - </find-doctors>

3.4. Location Content Type

To add Location content, navigate to **Content** → **Add Content** → **Location**. This will take you to Create Location Page which has following fields.

- **Location ID**
- **DisplayName**
- **Location Type**
- **Overview**
- **Abstract**
- **Address**
- **Phone Number**
- **Alternate Phone Number**
- **Fax Number**
- **Office Hours**
- **Hours Comments**
- **Website URL**
- **Services**
- **Location Image**
- **Fax**
- **Hours of Operation**
- **Services**– Dropdown typeahead which lists selections from taxonomy vocabulary “Services”.
- **Location Image**.
- **Body Top and Body Bottom layout**

After entering values into above fields save the content. Content can be saved in either draft, In review, Published or Archived state.

Searchable fields for Location Content are as follows

- **Location Name** – Typeahead dropdown list field
- **Services** – Dropdown field with list of services
- **Location Type** – Dropdown field with list of location type
- **City** – Dropdown field with list of cities

Location Search Page URL - </find-locations>

3.5. Services Content Type

To add Services content, navigate to **Content → Add Content → Services**. This will take you to Create Services Page which has following fields

- **Title**
- **Services** - Dropdown typeahead which lists selections from taxonomy vocabulary “Services”.
- **Specialties** – Dropdown typeahead which lists selections from taxonomy vocabulary “Specialties”.
- **Abstract**
- **Services** – Dropdown typeahead which lists selections from taxonomy vocabulary “Services”.

To build Services page, add the components to body top, Body Middle (Left), Body Middle (Right) & Body Bottom. After entering values into above fields & components save the content. Content can be saved in either draft, In review, Published or Archived state.

Services Search Page URL: /services-search

3.6. News Content Type

To add News content, navigate to **Content → Add Content → News**. This will take you to Create News Page which has following fields

- **Title**
- **Category** – Dropdown list typeahead which lists selections from taxonomy vocabulary “News Categories”
- **Date**
- **Image**
- **Abstract**
- **Body**

After entering values into above fields save the content. Content can be saved in either draft, In review, Published or Archived state.

Searchable fields for News Content are as follows

- **Keyword** – Typeahead dropdown field with Search query on News title.
- **Category** – Dropdown field with list of news categories
- **Date** – search by from and to dates

News Search Page URL: /news-search

3.7. Patient Story Content Type

To add Patient story content, navigate to **Content → Add Content → Patient Story Content Type**. This will take you to **Create Patient Story** Page which has following fields

- **Title**
- **Category** - Dropdown field which lists selections from taxonomy vocabulary “**Patient Story Categories**”
- **Date**
- **Image**
- **Abstract**
- **Body**

After entering values into above fields save the content. Content can be saved in either draft, In review, Published or Archived state.

Searchable fields for Patient Story Content are as follows

- **Keyword** – Typeahead dropdown field with Search query on News title.
- **Patient Story Category** – Dropdown field with list of news categories

Search Page URL: /patient-stories-search

3.8 Basic Page Content Type

A basic page can be created by adding component to the regions. [Refer to section 7.](#)

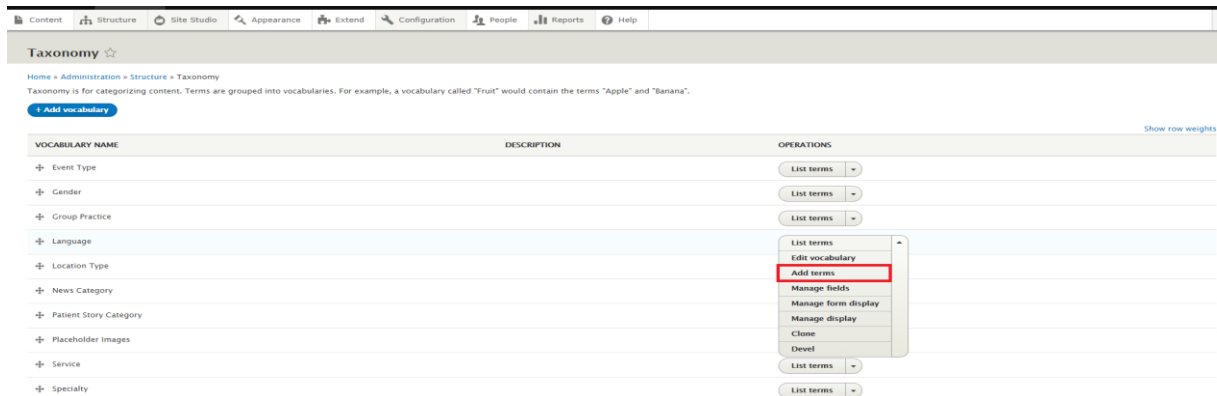
4. Taxonomy – Add / Edit Term

Categories are used to sort content. By tagging a content item with a term belonging to a specific category, tagged Content will be shown on its own page and in other listings on the site. To add new terms, follow below steps:

4.1 Navigate to **Structure** → **Taxonomy**

4.2 Add new terms to the vocabulary. Click on **Add Terms** to the right of each vocabulary.

Figure 4-2



- 4.3. Add Term page is displayed with following fields
 - **Name** – Enter term name
 - **Description** - Optional field and this is not used on the front end of the site.
 - **URL alias** - Optional field and can be skipped.
- 4.4. Click on **Save** and new term will be created
- 4.5. **Weights** - Used to order the terms. “heavier” terms (those with a 10 for example) will sink to the bottom, lighter ones (like “0” or “-10”) will float. Terms with the same weight will order alphabetically.

To Edit the term

1. Go to Term, Click **Edit** button on the right. You can edit the values entered.
2. Save the changes.

5. Components

5.1. Custom Components

Custom Components are content layouts created specifically for Genesis. These components are intended to be used on basic page content type, service content type, News Content Type, Location Content type and Patient Story Content type. To access components created, navigate to **SiteStudio → Components →**

Following are various types of Custom Components

1. Hero Components
 - a. Hero – Internal Page
 - b. Hero – Banner
 - c. Banner
2. Text Components
 - a. Heading

- b. Link List
 - c. Statistics Component
 - d. WYSISYG
 - e. Text and Image
 - f. Two-Column Multi-Use
 - g. Single-Column Multi-Use
- 3. Image and Media Components
 - a. Icon Component
 - b. Video
 - c. Image
 - d. Featured Component
- 4. Card Component
 - a. The Latest
- 5. Accordion Component
 - a. Accordion Container
 - b. Accordion Item
- 6. Tabs Component
 - a. CTA Component
 - b. Tabs Container
- 7. Dynamic Components
 - a. Services Related Locations
 - b. Services Related Doctors
 - c. Related Content
 - d. Recent Patient Stories
 - e. Related Content
 - f. Healthwise Embed

NOTE: Each of above Components are explained in detail below. Each of above Custom Block Types are explained in detail below.

5.1.1 Hero Component – Hero Banner

Hero Banner Component consists of two tabs “**Content**” and “**Layout and Style**”

Content tab consists of following fields

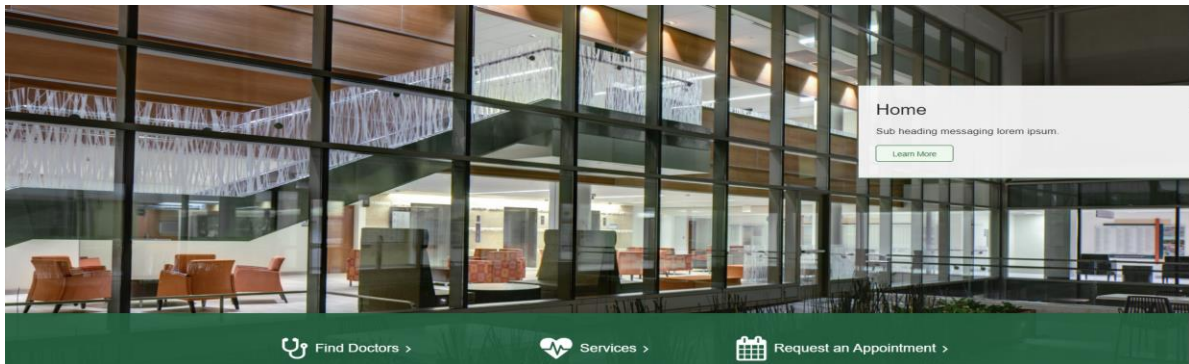
- Image
- Heading – Heading defaults to Page title
- Subheading
- CTA Button – Button Text & Button link
- Hero Menu – Slider On/off
- Icon (Media field)
- Name
- URL

Layout and Style consists

- Padding top and bottom of section

Following is screenshot for reference which shows Hero Banner Component looks once it is created.

Figure 5-1-1



5.1.2 Hero Component – Hero Interior Page Banner

Hero Interior Page Banner Component comprises of Hero Internal and Right Column Components

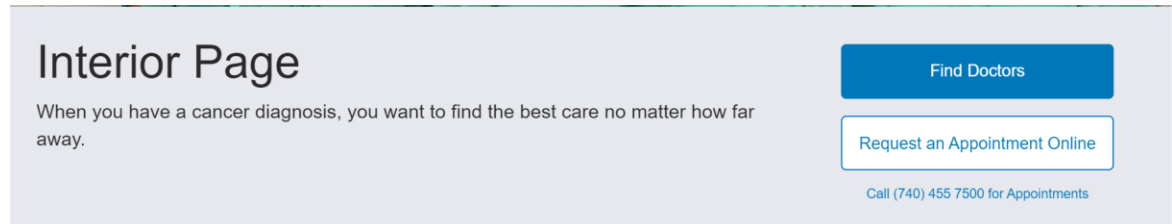
Hero Internal Consists of following fields

- Title
- Subhead
- Background color
- Padding

To build links on the right column, to the Right column container add Link list component and update field values.

Following is screenshot for reference which shows Hero Banner Component looks once it is created

Figure 5-1-2



5.1.3. Text Components - Heading

This Component contains following fields. This component can be used to place h1, h2, h3 or h4 size heading on node

- Component Description field
- Heading
- Heading size

Following is screenshot for reference which shows how Heading Component looks once it is created.

Figure 5-1-3

H2 Cancer Care

5.1.4. Text Component – Link List

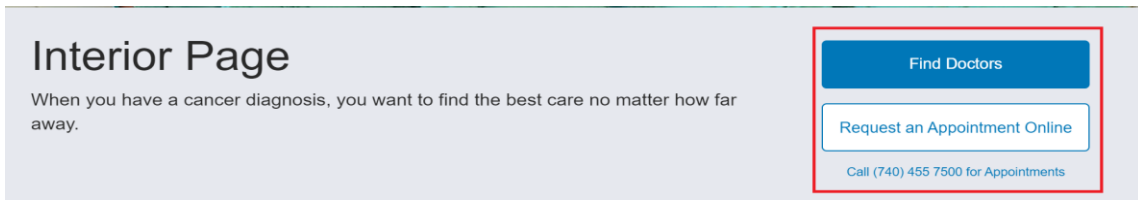
This component contains following fields

- Component Description
- Orientation - Drop down field with "**Horizontal**" and "**Vertical**" option
- Alignment – Drop down field with "**Left**", "**Middle**" and "**Right**" option.
- Link Text
- Link URL
- Style – Drop down field with "**button**" and "**text**" option. Link can be rendered as button or text
- Button Style
- Button Width
- Button Height

This Component can be added to Hero – Interior Page Component, Single Column Multi Use & Two Column Multi Component

Following is screenshot for reference which shows how Link List component looks after creation.

Figure 5-1-4 – Link list component added to Interior Page component



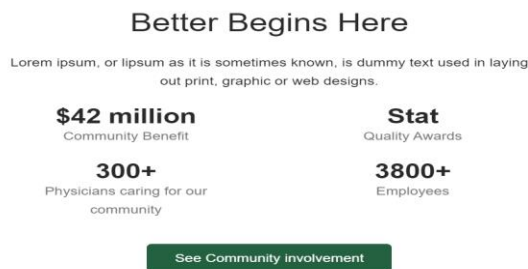
5.1.5. Text Component – Statistics Component

This component contains following fields

- Component Description
- Title
- Description
- Stat Fact Title (Max limit is 4 stats field)
- Stat Fact Description
- CTA Button – URL and text
- Media Video URL

Following is screenshot for reference which shows how Statistics Component looks once it is created.

Figure 5-1-5



5.1.6. Text Component – WYSIWYG Component

WYSIWYG Component is CKE Editor field which allows formatted text, insert media, files, and links. Component can be added to Single Column Multi Use Component & Two Column Multi Use Component

Text Format allows option to select between Site Studio and Rich Text. Both formatting tools has identical menus

Following is screenshot for reference which shows how Statistics Component looks once it is created

Figure 5-1-6 – WYSIWYG Component is added to Single column component

H2 Lorem Ipsum Heading

When you have a cancer diagnosis, you want to find the best care no matter how far away. Fortunately for patients in Southeastern Ohio, excellent cancer care is right here at Genesis. From diagnosis to treatment, we offer [personalized, comprehensive services](#) that help you experience the best outcomes.

5.1.7. Text Component – Text and Image

This component contains three tabs “Content”, “Layout and Style” and “Help”

Content Tab consists of following fields

- Heading
- WYSIWYG
- Link - Link Text and URL
- Image – Alt Tag and Caption

Layout and style consist of following fields

- Image Position – Allows to choose the Image position either left or right
- Background Color – Allows to choose the color from the palette
- Padding – Drop down field with to choose padding option “None”, “Top only”, “Bottom only”, “top and bottom only”

Help tab gives instructions about using the component

Figure 5-1-7 – Image Position to Right



5.1.7. Text Component – Two Column Multi Use

Two Column Multi Use Component consists of following tabs “**Section Settings**”, “**Layout and Style**” and “**Help**”. Following elements can be added to Two Column component

WYSIWYG Component, CTA Component, Accordions Component, Tab Component, Link List Component, Image, Video

Section Settings – allow to add the heading to the two-column layout

Layout and Style consist of following fields

- Column Width – Set the column 1 and column 2 width. Always ensure the sum of the fractions totals up to 1. If fractions add up to more than 1, then column 2 will move to next row.
- Background Color – allows to choose the background color from the Palette

- Extent background to Left – toggle on/off button to extent the background color to the left of browser window
- Padding top and bottom section

Help tab gives instructions about the component

Following is screenshot for reference which shows how Footer Site Info Block looks after creation.

Figure 5-1-7 – Two Column Component using ½ and ½ column width with WYSIWYG field to left and Image and CTA component on right



5.1.8 Text Component - Single Column Multi Use component

Single Column Multi Use Component consists of following tabs “**Section Settings**”, “**Layout and Style**” and “**Help**”. Following elements can be added to Two Column component WYSIWYG Component, CTA Component, Accordions Component, Tab Component, Link List Component, Image, Video

Section Settings – allow to add the heading to the single column layout and align the heading to the left or center

Layout and Style consist of following fields

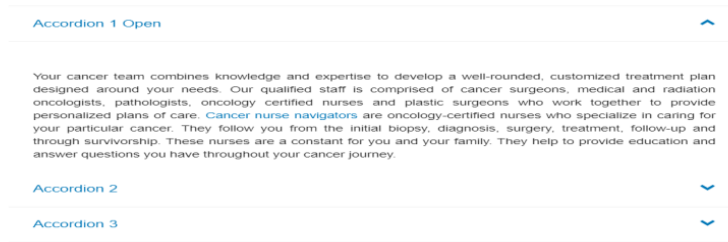
- Background Color – allows to choose the background color from the Palette
- Extent background to Left – toggle on/off button to extent the background color to the left of browser window
- Padding top and bottom section

Help tab gives instructions about the component

Following is screenshot for reference which shows how Single Column Component looks after creation.

Figure:5-1-8 Accordion component added to Single Column Container

H2 Accordion



5.1.9 Image and Media Components – Icon Component

This component contains following fields and should be placed in “**Body Top**” layout region

- Component Description
- Name
- Icon – Media Field
- Link – Typeahead search field
- CTA Button with Text and URL field

Build allows to add as many Icons needed. Following is screenshot of how Icon component looks after creation.

Figure 5-1-9



5.1.10. Image and Media Components – Video Component

Component can be placed in **Body Top**, **Body Middle Left**, and **Body Bottom** region as standalone component. Also, can be embedded to **Single Column Multi-Use** layout component and **Two Column Multi-Use** component.

Component consists of following fields

- Component Description
- Video URL
- Fall back Image

- Caption

Following is screenshot for reference which shows how **Video component** looks after creation.

Figure 5-1-10 – Video component rendered in two column layout left and right position

Advance Directives Assistance

Genesis Spiritual Care offers help with advanced directives. **Advanced directives** are legal documents that allow you to spell out what kind of medical care you'd want if you were too ill or hurt to express your wishes. If you need help with **advanced directives**, call Ann Vannoy at (740) 454-5859 to schedule a time to talk with us. You can reach us Monday through Friday from 8 a.m. to 4:30 p.m.



Test Video Component

5.1.11. Image and Media Components – Image Component

Component can be placed in **Body Top**, **Body Middle Left**, and **Body Bottom** region as standalone component. Also, can be embedded to **Single Column Multi-Use** layout component and **Two Column Multi-Use** component.

Component consists of following tabs “**Content**”, “**Layout and Style**” and “**Help**”

- **Content** section has **Image** field to select the image from library, **Alt tag** and **Caption** field.
- **Layout and Style** section allows to set the **width** of the Image, **background color** and **Padding**
- **Help** tab gives instructions about the component

Following is screenshot for reference which shows how **Image component** looks after creation

Figure 5-1-11 – Image component rendered in two column layout (Width -narrow right)

H3 Heading

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

[Learn More](#)



Optional image caption

5.1.12. Image and Media Components – Banner Component

Banner Component should be placed on Body Top layout region using **Basic Content type** and **Services Content type** on Interior pages. It consists of following fields

“**Content**” and “**Layout and Style**”

- **Content** section allows to Upload image and add Alt Tag
- **Layout and Style** section allow set the padding top and bottom section

Following is screenshot for reference which shows how **Banner component** looks after creation

Figure 5-1-12



5.1.13. Image and Media Components – Featured Component

Featured Component should be placed on Body Top layout and Body Bottom Layout Region on any of these Content types **Basic, Services, News, Location, Patient Story**. It consists of following tabs “Content” and “Layout and Style”

Content section consists of following fields

- Image
- Alt tag
- Heading
- Content
- CTA Button – Link and URL

Layout and Style section allows padding top and bottom of section

Following is screenshot for reference which shows how **Featured component** looks after creation

Figure 5-1-13



5.1.14. Dynamic Components – Related Content, Services Related Doctors & Services Related Doctors, Patient Stories

Dynamic Components consists of View blocks added as components and they are “**Related Content**”, “**Services Related Locations**” & “**Services Related Doctors**”

Related Content - Related Content block should be added to Body Middle Right

And they show the parent and child pages. This component should be added on Basic

Content type and Service Content type page

Services Related Doctors – This component should be added on Services Page. For services with specialty tagged. Adding this component would dynamically populate Doctors mapped to the specialty

Services Related Locations – This component should be added on Services Page. For pages with “services” tagged. Adding the component would dynamically populate Location with matching services

Patient Stories – This component can be added to Body Top and Body bottom canvas layout on Basic, Doctor, Location, Services, News and Patient Story.

5.1.15. Dynamic Components – Latest Component

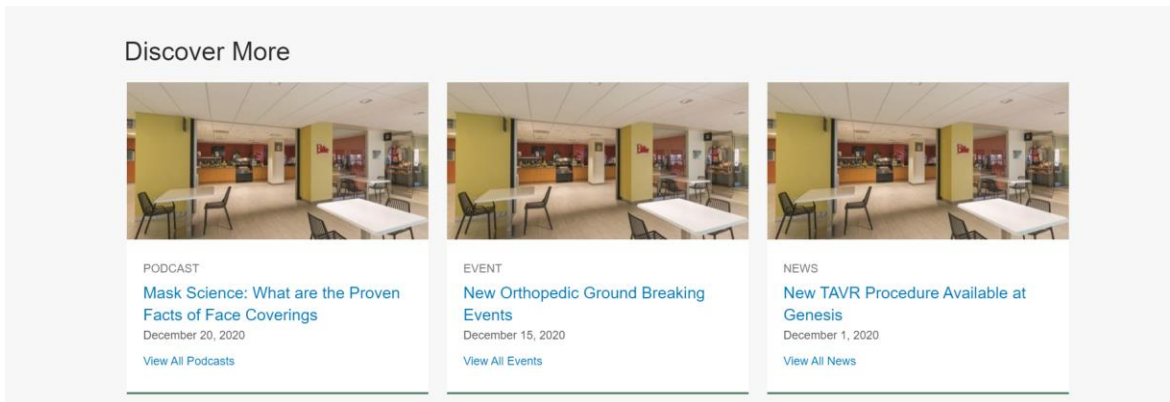
Latest Component should be placed on Body Bottom Layout Region on any of these Content types **Basic, Services, News, Location, Doctors, Patient Story**

Components consists of following fields and add up to 3 cards

- Image
- Alt tag
- Title
- Title URL
- Type
- Date
- View all Title
- View all URL

Following is screenshot for reference which shows how **Latest component** looks after creation

Figure 5-1-13



5.1.15. Dynamic Components – Healthwise embed

This component allows to add content from Healthwise using the CMS embed.

Components contains following fields

- Component description
- Topic ID -
- Video Embed – Toggle button on/off

From Healthwise site using CMS embed option copy the ID and paste the ID in topic ID field.

5.2 Reusable Component Content

Site Studio allows to save Components as reusable component content. When a component is saved as component content, a new content entity is created which can then be reused across your site. Any changes you make to the Component content will update wherever it's been used.

5.2.1. To create a component and reusable component content

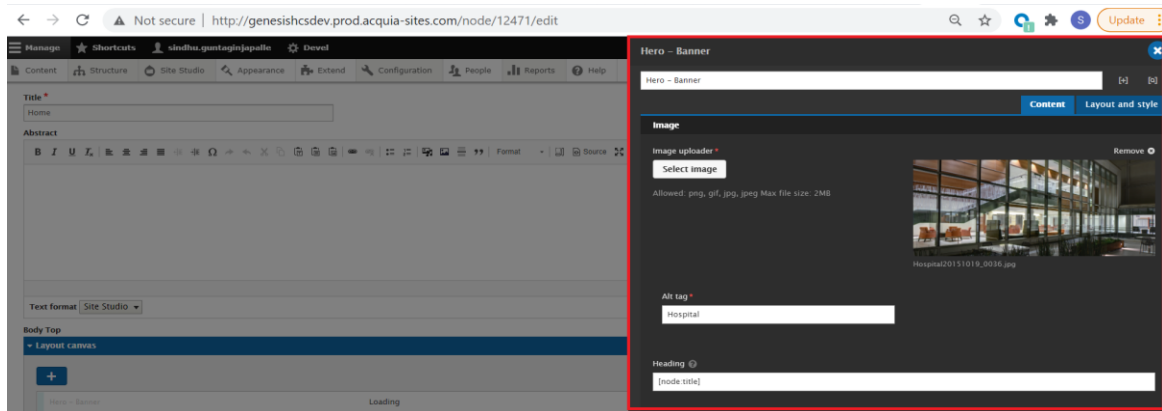
5.2.1.1. To create a reusable component on Layout Canvas, navigate to *page or content type that includes layout canvas* **Manage** → **Content** → **Add Content** → **Basic Page**

5.2.1.2. Scroll down to layout canvas and click on + button and to the left panel opens with list of available components

5.2.1.3. Drag and drop the component into the canvas layout and click on the ...ellipsis menu on the Component and then click Edit to edit its settings or double click the component

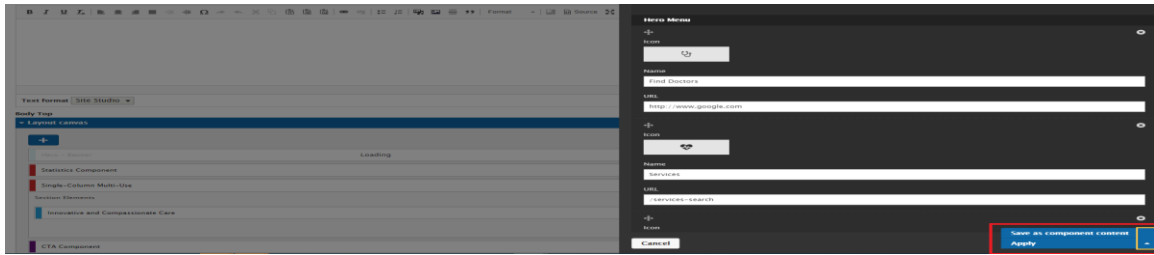
5.2.1.4. Add the content to the component and click on the apply and the content is saved

Fig 5.2.1.4



5.2.1.5. Click on drop down arrow next to Apply button

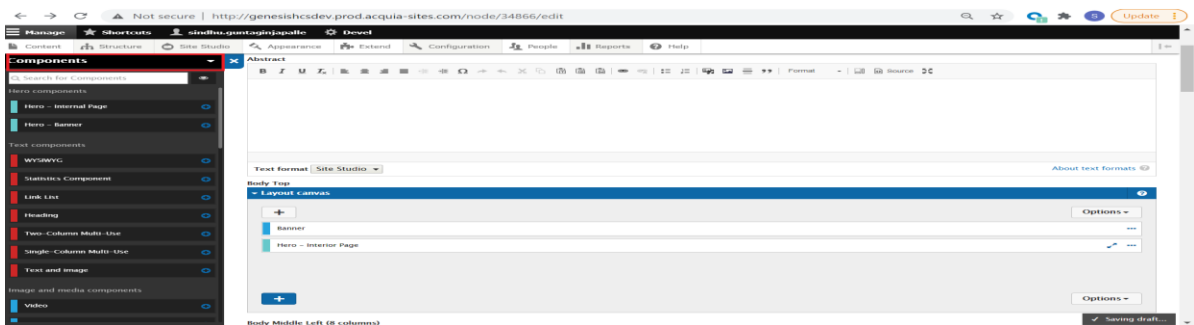
Fig 5.2.1.5



5.2.1.6. Click on Save as component content. The component content will now be saved.

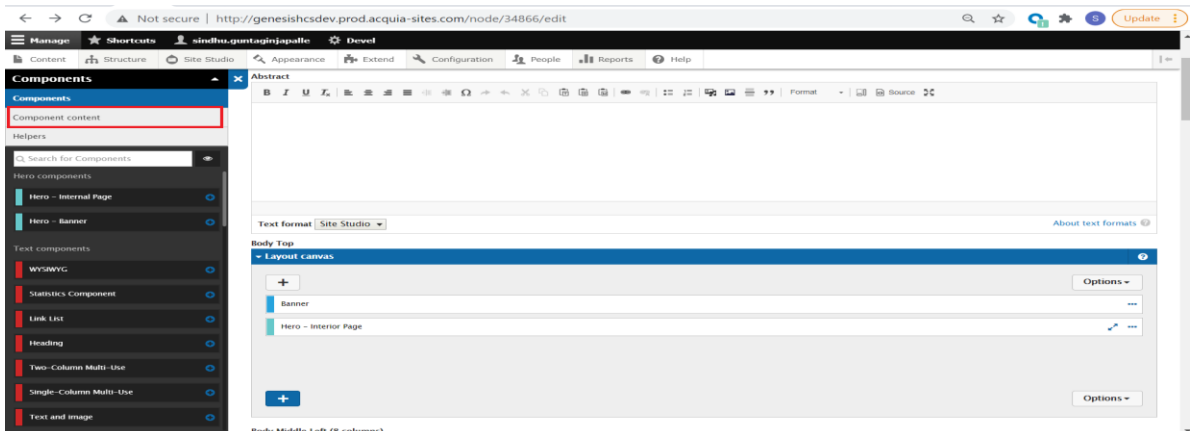
5.2.1.7. Open the left panel and click on the drop down next to component on top

Fig 5.2.1.7



5.2.1.8. From the drop down select component content and reusable component added will be displayed

Fig 5.2.1.8



5.2.2. To add a reusable component to Layout Canvas

5.2.2.1. To add a reusable component, navigate to *page or content type that includes layout canvas*
Manage → Content → Add Content → Basic Page

5.2.2.2. Scroll down to layout canvas and click on + button

5.2.2.3 Within the side bar browser, Click on Drop down against Components. From the drop-down

list select **component content**.

5.2.2.4. list of Component content added will be listed. Drag and drop the component that is needed, and the component is added to canvas layout

5.2.2. To edit reusable component content

5.2.2.1. Editing your Component content will cause all instances of that component content to be updated with the changes. You can edit your component content through the administration menu **Sitestudio → Components → Component Content**.

5.2.2.2. Editing a Layout canvas on a node that has Component content placed on it, you can double click the Component content, which will open the sidebar editor. Click on the edit link to take you to edit that component content. Make your changes to component content and click save. The changes will be applied to the node instance

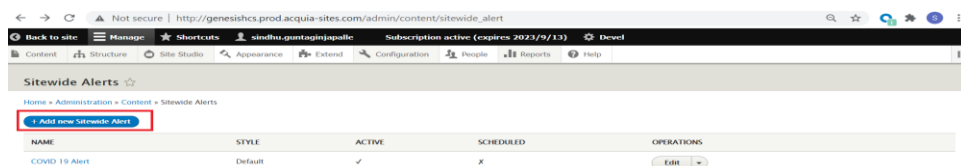
5.3. Sitewide Alerts

Alert component is added to the header region with dismissal button. The module allows the ability to set the alert sitewide or certain pages

5.3.1. To add Alert

5.3.1.1. Navigate to Content→Sitewide Alerts. Click on Add sitewide alert button

Fig 5.3.1.1



5.3.1.2 Sitewide alert form is displayed with following fields

- **Name**
- **Alert Style** (Drop down field – set the value to default)
- **Alert Message** (CKE Editor field)
- **Dismissible** (Checkbox field – to allow the dismissal button on the alert block)
- **Ignore Previous dismissals** (Admin/Content Author should check off this box manually to ignore any previous dismissals. If Dismissible is checked off on the alert. Recommend checking this box every day and save the config. This allows the block to pop up on end user screen on following site check-ins)

- **Schedule Alert** – Selecting Schedule Alert would allow to set the start date and end time with time settings
- **Page visibility** – Allows to add page URL to display or restrict block on specific pages

Fig 5.3.1.2

5.3.1.3 Enter the values in the above fields and save the Config

5.3.1.4 To edit the values in the form, select Edit option on the form and save the changes

Fig 5.3.1.2

NAME	STYLE	ACTIVE	SCHEDULED	OPERATIONS
CROUCH 1x alert	default	✓	x	Edit

6. Menus

Menus are used to create the navigational elements across the site, including utility navigation, primary navigation, footer navigation, Footer Bottom navigation. To display menus, menu created should be placed in specific menu blocks. Generally, menu blocks and placement will not need to be edited; only the menu content should require edits and updates. To access menus, navigate to **Structure > Menus**

6.1. Menu Summary

Below please find a summary table of pertinent block information

Menu	Site Area	Associated Block	Notes
------	-----------	------------------	-------

Main Navigation	Side Bar Right Region	Related Content	
Primary Navigation	Header Region		
Connect with Us	Footer Region		
Policies	Footer Region		
Resources	Footer Region		
Utility Navigation	Utility Region		

6.2. Adding Menus

Following are the steps to add menus

6.4.2.1. Navigate to **Structure → Menus → Add menu**

6.4.2.2. Enter a **Title** and brief **Administrative Summary**.

6.4.2.3. **Save** the Menu

6.4.2.4. To add links under the menu created, Select **Edit** option for the menu created

6.4.2.5. Click on **Add link** and **Add menu link** page is displayed

6.4.2.6. Enter a **Title, Link** and assign to **parent link** and **Save** the link

6.4.2.7. You can add as many menus as required.

6.3 Editing Menus

Following are the steps to Edit Menus

6.4.3.1. Navigate to **structure → Menus**

6.4.3.2. Go to menu item that should be edited and Click **Edit** Menu under **Operations** Column

6.4.3.3. **Edit Menu link** Page is displayed

6.4.3.4. Go to the link that should be edited and Click **Edit** under **Operations** Column

6.4.3.5. You can edit the **Menu link title, Link, Parent Link** and assign **Weight**. Other fields are Optional and can be skipped

6.4.3.6. By default, **enable** checkbox will be selected. Enable is a checkbox field which defines whether the links should be enabled in menus or hidden

6.4.3.7. **Save** the changes.

6.4 Related Content Menu

All Related Components are blocks that is either added the content type or can be placed independently on a page. Following are the related components block

- **Related Providers** – This block is added to Location Detail Page and Services Detail Page
- **Related Location** – This block is added to Services Detail Page
- **Related Articles** – This block is added to News Detail Page
- **Related Patient Stories**
- **Related Events** – This block is added to Event detail Page

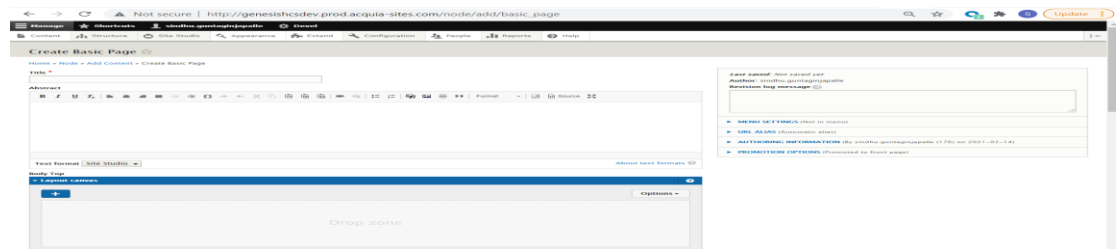
7. Basic Page – Create/Edit

7.1 Home Page

7.1.1. To Create home page using components navigate to **Content** → **Add Content** → **Basic Page**

7.1.2 Create Basic Page is displayed with fields. Add Content to Title, Abstract and drag and drop components to Body top & Body Bottom region

Fig 7.1.2



7.1.3. Add content to the component and save the component

7.1.5 Change the workflow by selecting required state from **Save as** dropdown list

7.1.6. Admin task bar above content regions has following options

- **View** - View the page created. Page can also be edited or configured when viewing by hovering over pencil icon to the right of each block.
- **Edit** – Allows to edit **Title**, **Body**, and change the workflow.
- **Delete** – Deletes the page
- **Revision** – View Page version history
- **Clone** – Clones the page
- ***Devel** – Devel contain set of commands. Recommend not to make any changes here.

7.3. Menu settings on a Page/node

For content types that needs to be added to menu, set the menu link at node or a page.

To the right-hand side of the page, following fields are available in menu settings.

- **Provide a menu link** – Check this box
- **Menu link title** – page title will be auto populated.
- **Description** – this field is optional and can be ignored
- **Parent item** – Assign parent item
- **Weight** – to set the order for the links

8. Events

8.1. Drupal Event Registration

Enable registration for an event by using following options

- **Registration type**
- **Registration Dates**
- **Total Number of Spaces Available** – Allows to set number of participants for each event
- **Enable Waiting list** – a checkbox field to enable waiting list when number of registrations reach maximum capacity

8.2.1. Registration Type

There are two types of registration

- **Individual Event Registration** – Allows user to register for each event instances.
- **Entire Series Registration** – Allows to register for entire series of events

8.2.2. Registration Dates

User can schedule opening and closing registrations by using following options

- **Open Registration** – Registration Opens immediately after event is published on live site and registration ends before event starts
- **Scheduled Registration** - Allows to set when the Registration should Open and Close for each event instances.

Registration Opens – A drop down field with following options

- **Now** – Registration opens immediately after event is published on live site
- **At the start of the event** – Registration window open when event begins
- **Custom Schedule** – This option allows to set when registration window should open for each instance. It could be months, weeks, days, hours, minutes, and seconds before the event starts

Registration Closes – A drop down field with following options

- **At the Start of the event** - Registration closes at the start of the event
- **At the End of the event** - Registration closes at the end of the event

- **Custom Schedule** - This option allows to set when registration window should close for each instance. It could be months, weeks, days, hours, minutes, and seconds before the event starts or after the event starts

8.2. Create a Basic Event

- 8.2.1. To Create an event or series of events Navigate to **Content → Add Events**.
- 8.2.2. All Event types will be listed
- 8.2.3. Click on **basic event** type.
- 8.2.4. Following are fields under basic event type
 - **Title**
 - **Event Type**
 - **Event category**
 - **Event Image**
 - **Abstract – Content in abstract field will be rendered in Search results cards and below the image on event detail page**
 - **Body – Body copy would be rendered above the cards on the detail page**
 - **Payment Terms**
 - **Fee**
 - **Location – System allows following options**
 - **Select genesis campus location**
 - **Add external location**
 - **For virtual events allows to set only the event title**
 - **Country – if genesis campus location is chosen, set the country to “none”**
 - **Street Address**
 - **City**
 - **State**
 - **Zip Code**
 - **Category** - Dropdown typeahead field which lists selections from taxonomy vocabulary
 - **Recur Type** – Allows to set Frequency of event. They are **Consecutive Event, Daily Event, Weekly Event, Monthly Event & Custom Event**
 - **Excludes dates** – Allows to exclude dates that from event series. For e.g. if event occurrence is set as Monthly event, and in a month the event is set to occur on a holiday. By using exclude dates the event can be excluded from series of events.
 - **Included Dates** – Includes specific dates in event series.
 - **Registration not required** – For any virtual event, where the registration platform is not Drupal, check off this button and enter the outbound link for registration
 - **Event Registration** – if the registration platform is Drupal event registration, event registration checkbox should be selected

- **Registration Type**
 - **Registration Dates**
 - **Total Number of spaces available**
 - **Enable Waiting list**
 - **Alternate Registration URL**
- 8.2.5. Enter values in the field and click on **save** event.
- 8.2.6. Event will be published to the live site
- 8.2.7. To view the event series created, navigate to **Content → Event Series**.
- 8.2.8. To view event instances, navigate to **Content → Event Instances** and click on the instance
- 8.2.9. Event details will be listed on page with following section tabs on the top
- **View**
 - **Edit**
 - **Delete**
 - **Revisions**
 - **Register**
 - **Clone**
 - **Registrations**
 - **Devel**
- 8.2.10. Click on **Registration** tab to view Registrant details for an event
- 8.2.11. To send email to **Registrants** and **Waitlisted** users click on Contact registrants.
- 8.2.12. Fill the form to send email to Registrants and waitlisted Users

8.3. Email Notifications

Content Author can set the automatic email notifications under **Structure → Events → Registrant Settings**.

Emails can be auto assigned for following actions by enabling **Registration Notification** checkbox

- Registration Notification
- Waitlist Notification
- Promotion Notification
- Instance Deletion Notification
- Series Deletion Notification
- Instance Modification Notification
- Series Modification Notification

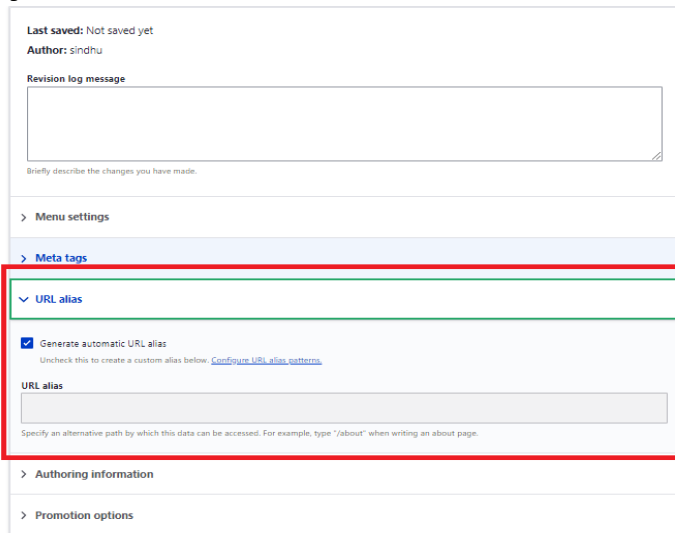
9. Basics Drupal

9.1. Setting the URL

9.1.1. Setting the URL on a Page-by-Page Basis

Each page, or node, within Drupal is automatically assigned a Node ID when created. This Node ID does not change, even when the URL changes, as long as the page/node exists on the Drupal site. In addition, the Node ID becomes part of the direct URL to the page. For example, <http://www.perficient.com/node/15106>. However, this is not considered to be a user-friendly URL, as it's not meaningful. To create a user-friendly or meaningful URL for the page, use the URL alias field within the URL Path Settings for each page to add the desired path/URL for the page. This also allows a hierarchical or nested structure of URLs to be created, as Drupal utilizes a "flat" structure for content (meaning all content is set up as /node/nodeid and there is no substructure).

Figure 9-1-1



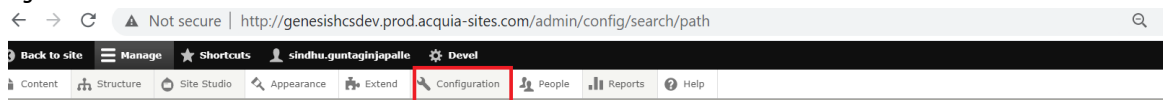
The screenshot shows the 'URL alias' settings for a Drupal node. The 'URL alias' field is highlighted with a red box. The form includes a 'Generate automatic URL alias' checkbox, which is checked. Below it, there is a text input field for the 'URL alias' with a placeholder text: 'Specify an alternative path by which this data can be accessed. For example, type "/about" when writing an about page.'

9.1.2. Setting the URL by Pattern

If pages using a particular content type (for example, News, Doctors, or Locations) should follow a particular URL pattern, the URLs for these pages may be automatically generated using Pathauto patterns.

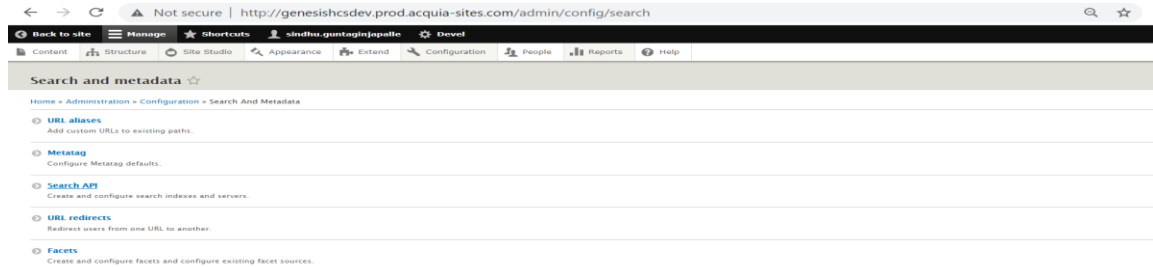
9.1.2.1. To access the Pathauto patterns, click on the Configuration menu option

Figure 9-1-2-1



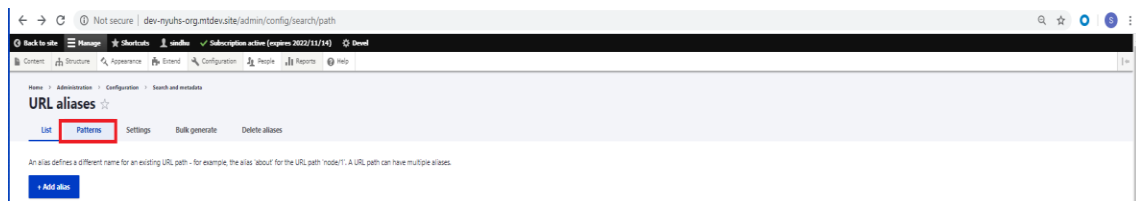
9.1.2.2. Scroll down to the Search and Metadata section and click on URL aliases.

Figure 9-1-2-2



9.1.2.3. On the URL aliases page, click on the Patterns tab.

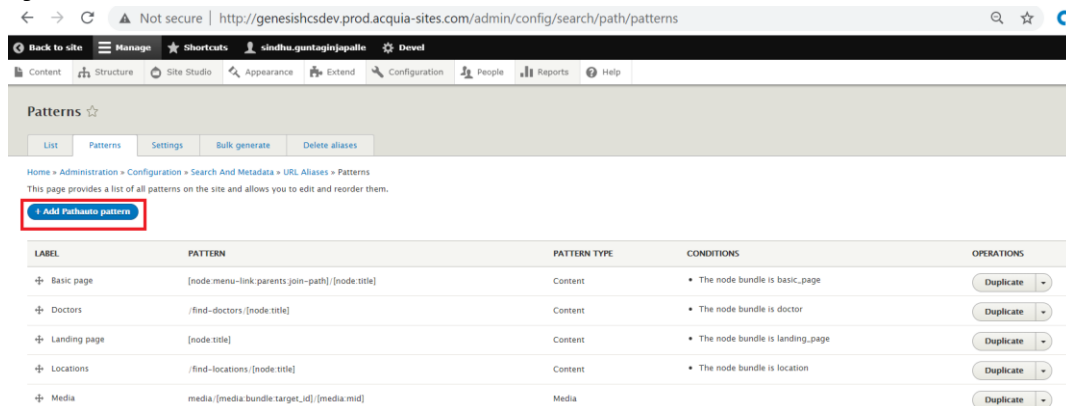
Figure 9-1-2-3



9.1.2.4. On the Patterns tab, all current set up patterns can be seen and edited.

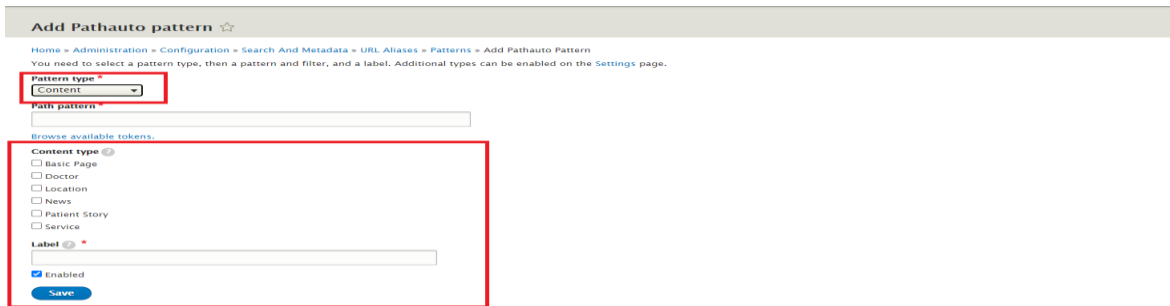
9.1.2.5. To add a new pattern, click on Add Pathauto pattern.

Figure 9-1-2-5



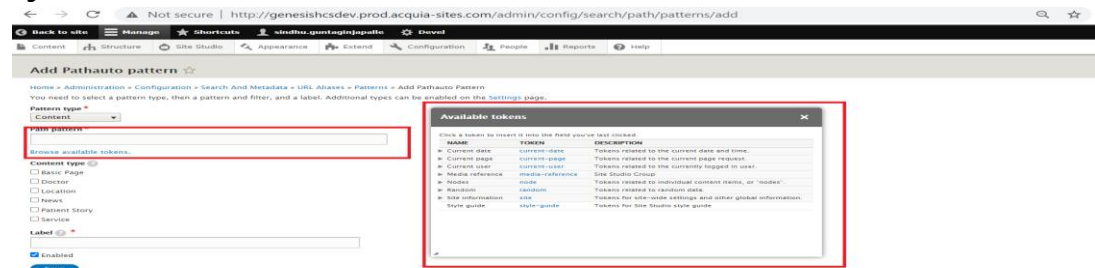
9.1.2.6. Choose the pattern type – is it for Content, Taxonomy terms, Media, or Users? If for Content, choose the desired content type.

Figure 9-1-2-6



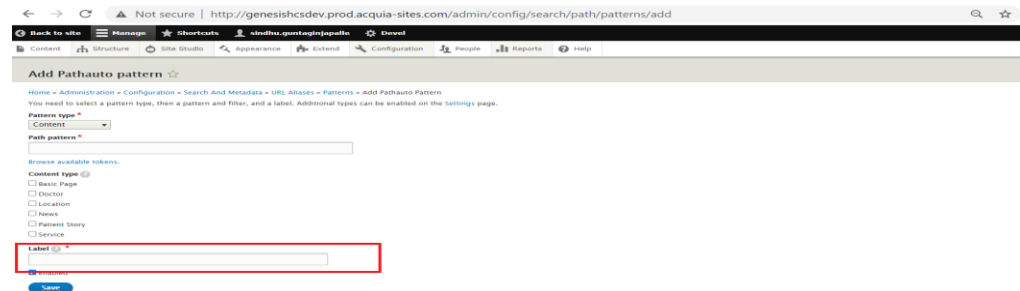
9.1.2.7. Using the list of available tokens, fill in the Path pattern field. For this example, the pattern has been set to `/news-search/[node:title]` so that the resulting URL for each page using the News content type will be `/news-search/title-of-the-news-item`.

Figure 9-1-2-7



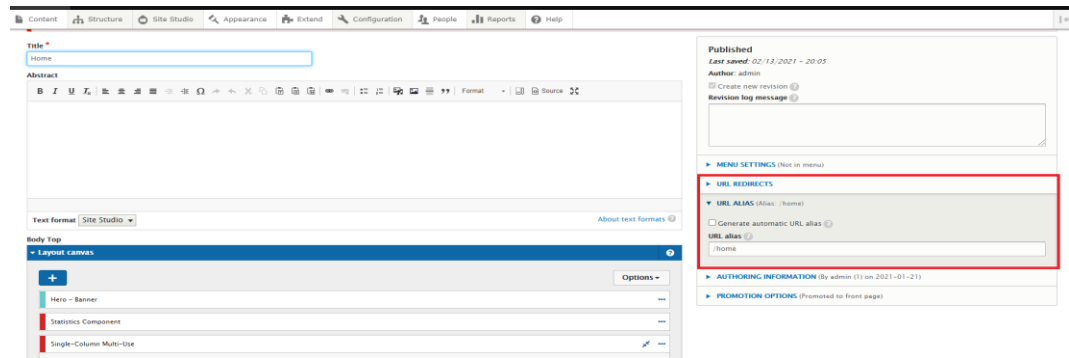
9.1.2.8. Fill in the Label field (what the pattern should be called) and then click **Save**.

Figure 9-1-2-8



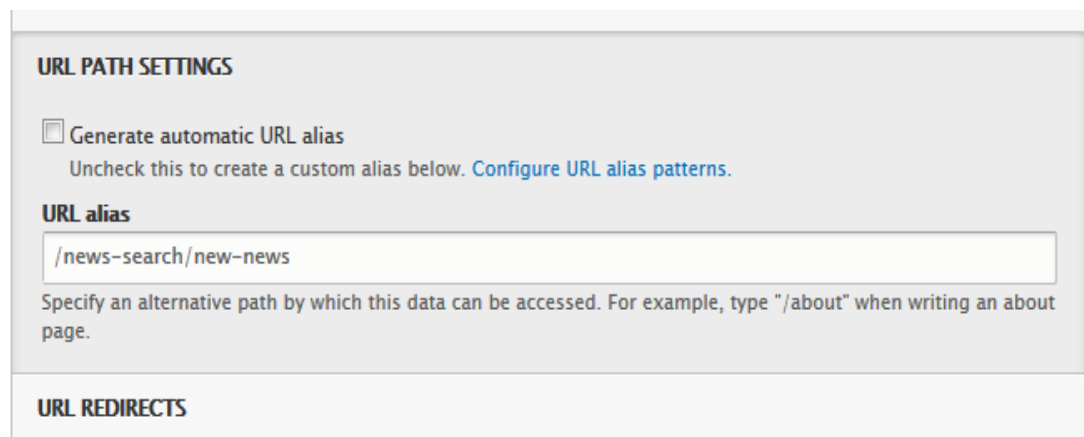
9.1.2.9. After the pattern is set, the URL alias for new pages created with that content type will be automatically set, based on the pattern.

Figure 9-1-2-9



9.1.2.10. If, for some reason, the URL path for a particular page should not follow the pattern, it can be updated by unchecking the “Generate automatic URL alias field and setting the desired alias in the URL alias field.

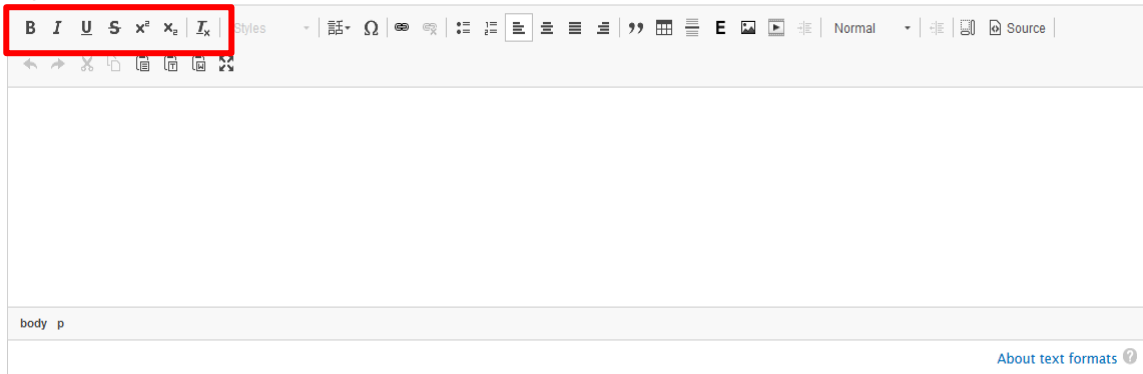
Figure 9.1.2.10



9.2. Using the Rich Text Editor

The Rich Text Editor is also known as the WYSIWYG (What You See Is What You Get) and functions mainly like a word program. You can click right inside the field and start typing. The first part of this section *will* cover each section of buttons from left to right. Hovering your mouse over each button will reveal its function name.

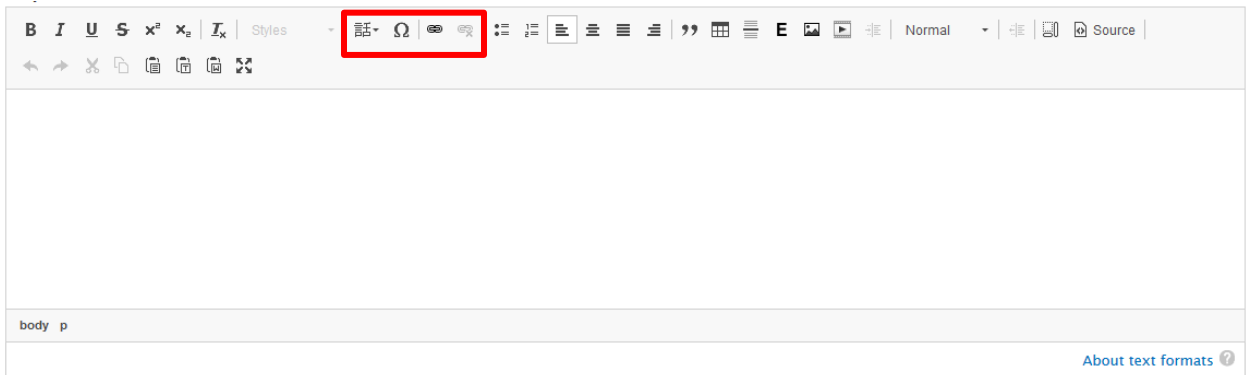
Figure 9-2-1



B I S x² x₂ I_x

- **Bold** – bold the selected text
- **Italic** – italicize the selected text
- **Strikethrough** – place a line through (~~strikethrough~~) the selected text
- **Superscript** – add small text font (superscript) on the upper right
- **Subscript** – add small text font (subscript) on the bottom right
- **Remove format** – remove the applied formatting from the selected text

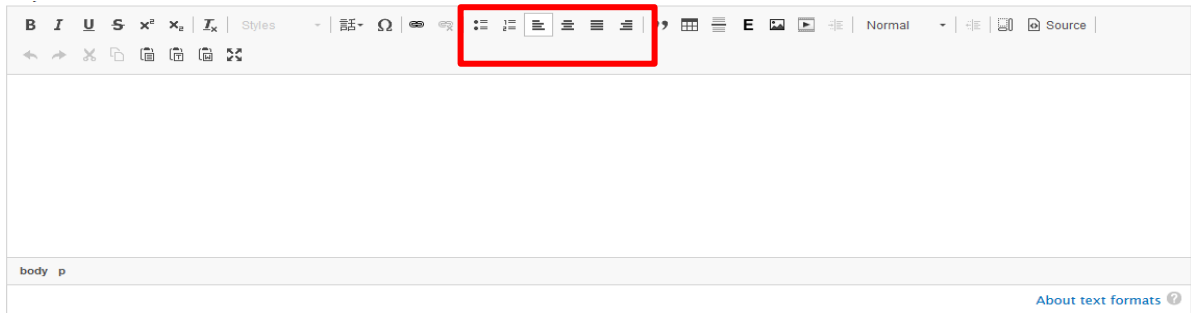
Figure 9-2-2



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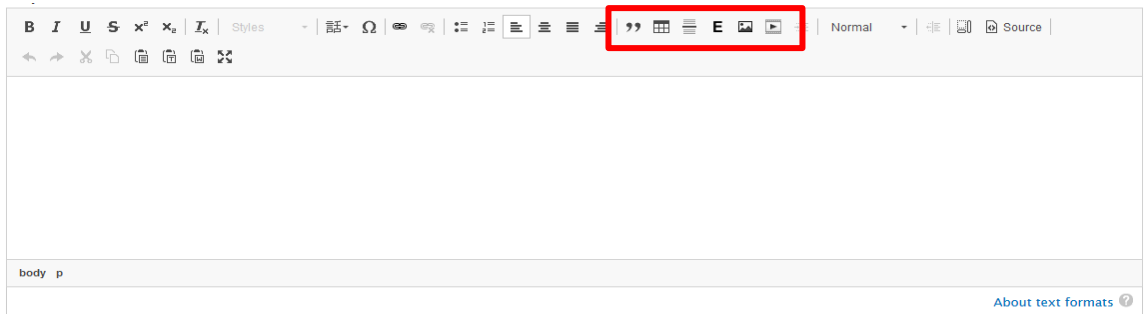
- **Set Language** – Note the language of the text being inserted by highlighting the text and selecting the language from the list.
 - *Note: This does not actually translate the text into the selected language*
- **Insert Special Character** – Insert various symbols and special characters from a predetermined list
- **Link** – Link the selected text to an internal or external URL
- **Unlink** – remove the link(s) in the selected text

Figure 9-2-3



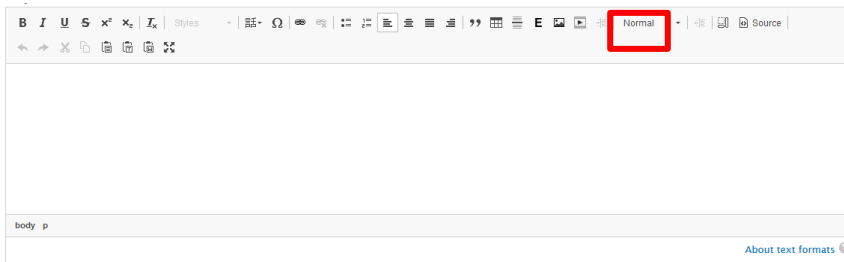
- **Insert/Remove Bulleted List** – start a new bulleted list, convert selected paragraphs to a bulleted list, or remove an existing bulleted list
- **Insert/Remove Numbered List** – start a new numbered list, convert selected paragraphs to a numbered list, or remove an existing numbered list
- **Align Left** – left-align text (by default, text is left-aligned)
- **Center** – horizontally center text
- **Justify** – justify text
- **Align Right** – right-align text

Figure 9-2-4



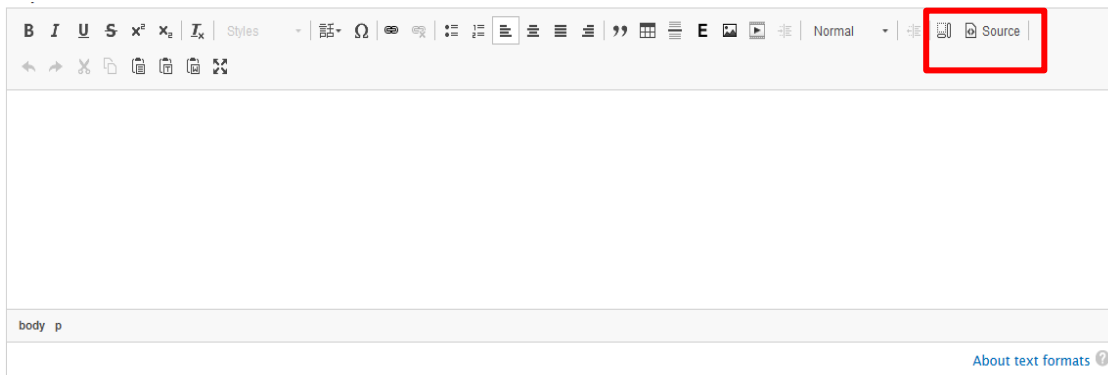
- **Block Quote** – insert text as a block quote
- **Table** – add a table to the page
- **Insert Horizontal Line** – insert a straight line across the page for separation of content.
- **Media Browser** – embed links to media items (such as Word and PDF documents) on the page (see Creating Links to Files/Documents, page 21 for more information)
- **Image** – add an image into the page content (see Adding an Image to a Page, page 23 for more information)
- **Video Embed** – embed a video, such as from YouTube, on the page

Figure 9-2-5



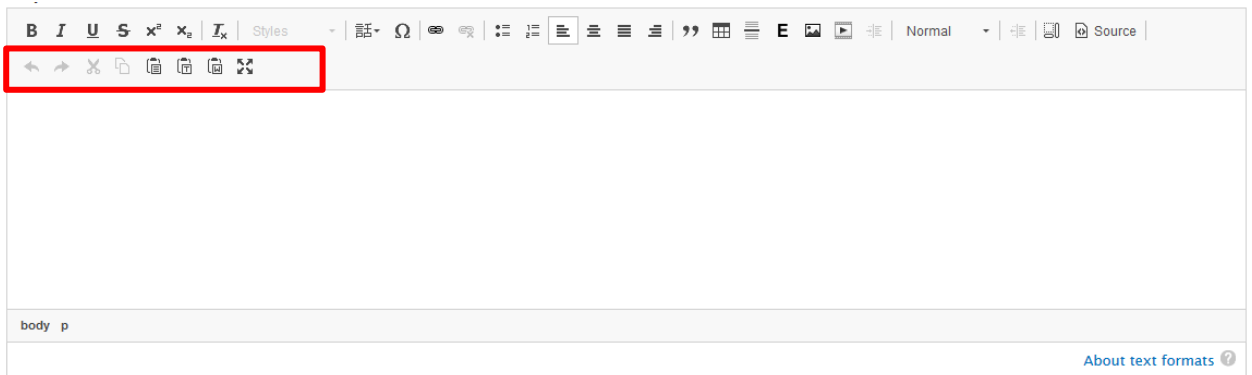
- **Paragraph Format** – apply different formatting, such as subhead levels, to selected text using the dropdown

Figure 9-2-6



- **Show Blocks** – see the different “blocks” that make up the formatting and content
- **Source** – see the HTML markup of content

Figure 9-2-7



- **Undo** – undo your last action

- **Redo** – redo your last action
- **Cut** – cut the selected text and save for immediate pasting
- **Copy** – copy the selected text and save for immediate pasting
- **Paste** – paste the selected text that was cut or copied
- **Paste as Plain Text** – paste cut or copied content copy from any source without any formatting or font codes carried over (this is the recommended solution when placing content from another source)
- **Paste from Word** – paste cut or copied content copy from a Word Document.
- **Maximize** – open the RTE in the full browser tab window

9.3. Adding Internal & External Links

9.3.1. Adding an Internal Link

An internal link means linking to a page within the existing Drupal site. Following are the steps to add an Internal Link

9.3.1.1. Select the desired text to be linked and press the Link button.

9.3.1.2. Insert the path to the desired page into the URL field. It is recommended that path to the node, rather than the friendly URL, is added into the URL field. This is because the node path remains the same as long as the page exists in Drupal, while the friendly URL can be updated and could cause the link to break. A complete list of nodes that correspond to URL Aliases can be found at `/admin/config/search/path`.

- A table of the node path and friendly URL can be found under Configuration > Search + Meta Data > URL Aliases

9.3.1.3. Insert the hover text for the link into the Title field.

9.3.2. Adding an External Link

An external link means linking to a page outside of the existing Drupal site. Following are the step to add an External Link

9.3.2.1. Select the desired text to be linked and press the Link button.

9.3.3.2. Insert the full URL (including http or https) into the URL field.

9.3.3.3. Insert the hover text for the link into the Title field.

9.4. Files & Media

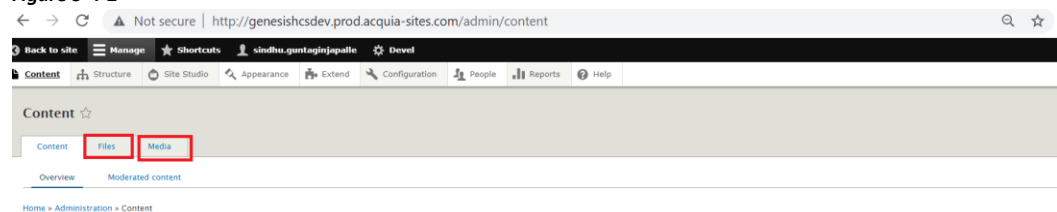
When adding a document or image into content, the item is created as a media item and a file. Media items essentially have their own nodes (and can have automatically created URLs that can be updated with a friendly URL alias, similar to updating the URL alias for a content page). The media items then reference the document or image itself.

To access the media items and files:

9.4.1. Click the Content menu option.

9.4.2. Click on the Files tab to see/add Files and click on the Media tab to see/add media items.

Figure 9-4-2



- 9.4.3. Click on the desired file or media item to see the URL path, which can then be used for creating content links to the item.
- **Media** – The URL path will start with /media unless a URL alias has been set on the media item
 - **Files** – The URL path should be in the following format: /sites/default/files/YYYY-MM/Document name.pdf and the path can also not contain %20 in place of spaces
- 9.4.4. New items may be added to the site using the Media tab. Within the Media tab, choose Add media (to add 1 item at a time) or Bulk upload (to add multiple items at once). When adding a new media item, the item will automatically be added as a file at the same time.

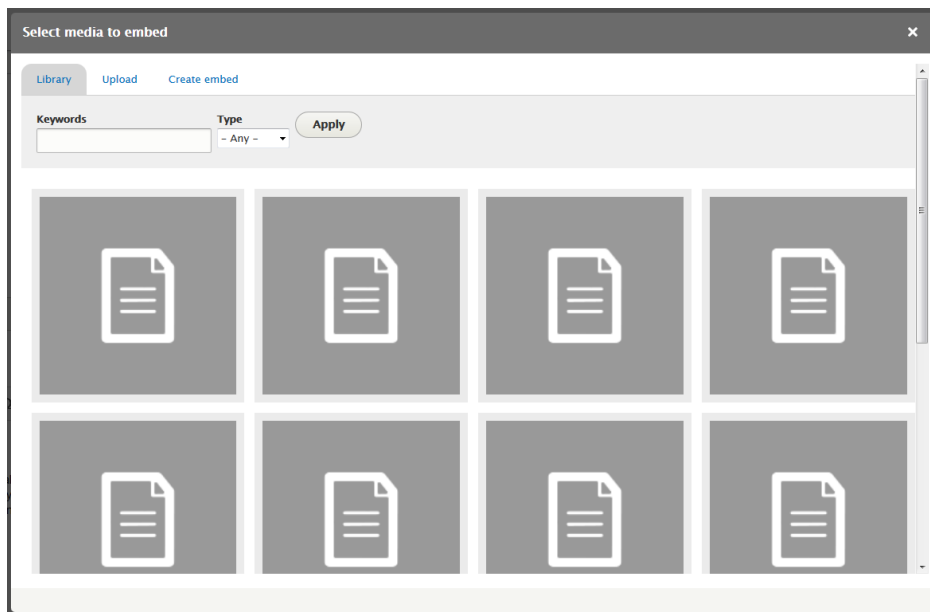
9.5. Creating Links to Documents

9.5.1. Embedding a Document Link

9.5.1.1 Press the Media browser button.

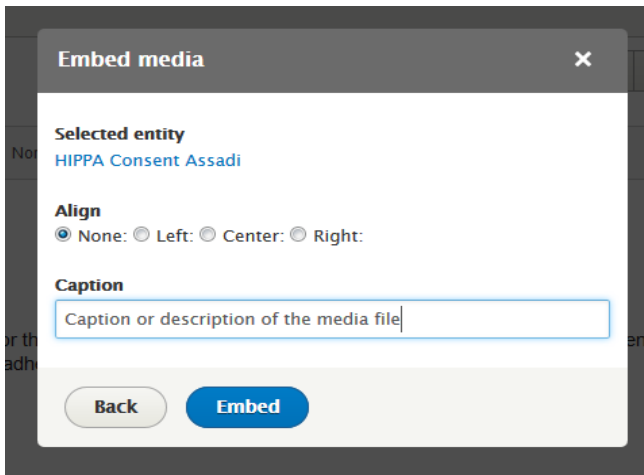
9.5.1.2. Find the existing file in the Library or upload a new file and then press the Place button at the bottom left of the popup.

Figure 9-5-1-2



9.5.1.3. If desired, add a description into the Caption field of the popup and then press Embed.

Figure 9-5-1-3



9.5.2. Adding an In-Text Document Link

If the URL path to a file or media item is known, an in-text link to the document may be added instead of embedding a link to the document.

9.5.2.1. Select the desired text to be linked and press the Link button.

9.5.2.2. Insert the path to the desired document into the URL field.


9.5.2.3. Insert the hover text for the link into the Title field.

Front End View of Embedding a File link vs Adding an In – Text Document Link

Figure 9-5-2

Different Methods of Linking to Documents

Embedded

 [HIPPA Consent Assadi.pdf](#)
Description of the document
for an embedded document
link

In-Text

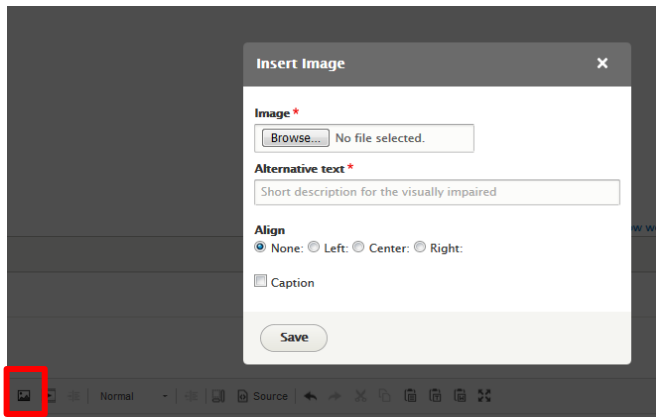
[In-text document link](#) - this type of document link can be added right into regular paragraph text.

9.5.3. Adding an Image to a Page

9.5.3.1. Place the cursor on the area of the Rich Text Editor that the image should be added to and then press the Image button.

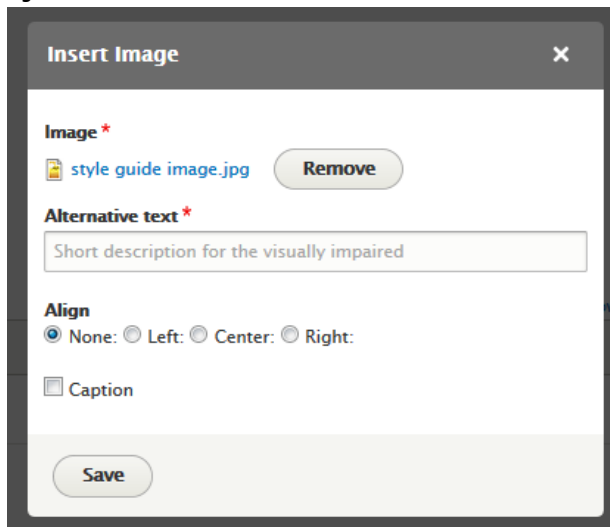
9.5.3.2. Press the Browse button to find the new image that should be uploaded and added to the page

Figure 9-5-3-2



9.5.4.3. Add the Alternative text and select the alignment of the image, then press Save.

Figure 9-5-4-3



9.5.3. Image Guide

Following table shows recommended Image specifications.

Image	Desktop <i>Recommended Upload Size</i>	Mobile
Home Page Hero Image		

9.5. Workflow

Workflows determine various stages (or moderations states) used when creating content. Within each workflow, there are two specific parts:

- Moderation States
- Moderation Transition

9.5.1. Moderation State

Following are moderation states that are available on all content types.

- **Draft** – creates a new draft version. This is useful for revision history. No versions of the page will be visible on the front end, as the page is not yet published.
- **In Review** – In this state page content is ready to be reviewed by Content reviewer No versions of the page will be visible on the front end, as the page is not yet published.
- **Publish** – Page content is published and is visible at the front end.
- **Archive** – Page content is archived, and version of the page is not visible at the front end.

Figure 9-5-1

When first creating a node, the node won't be published to the live site right away, by default **Save as** option is set to **Draft**. And depending upon Workflow, moderation state can be changed **Schedule Status Change**: If enabled Content status is auto updated based on scheduled state, date and time.

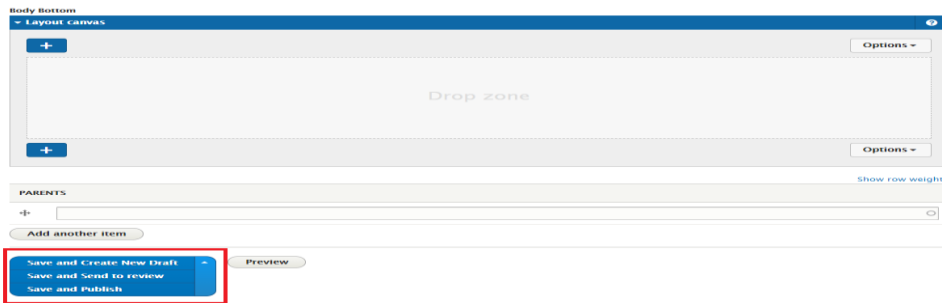
9.5.1. Moderation Transition

Below are the Moderation Transition on Content types

Moderation State	Transitions
Draft, In Review, Published, Archived	Draft
Draft, In Review	In Review
Draft, In Review, Published	Published
Published	Archived
Archived	Published
Draft, In Review	Archived

According to the state of the content, the transitions can be applied. When editing an existing page, it is very likely that a version of the page is already published to the live site.

Figure 9-5-2 Shows the state to which a published content can be transitioned



9.6. Setting Up Redirects

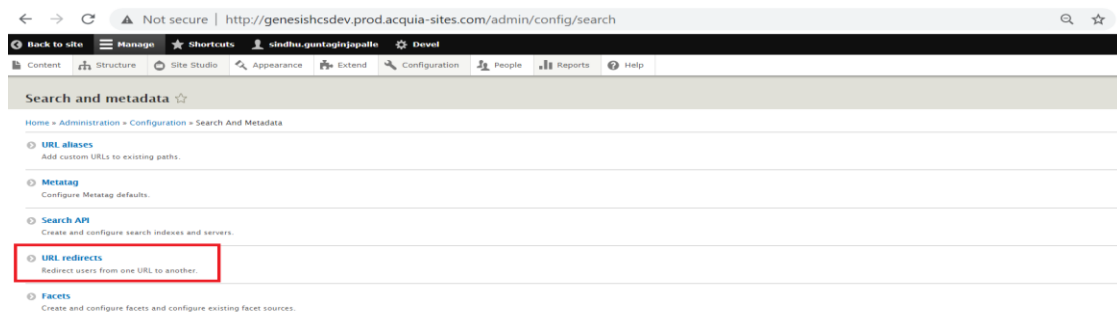
9.6.1. Redirect Manager

The redirect manager is used to maintain content and domain redirects. Short or “alias” URLs (such as campaign URLs) can also be maintained.

9.7.1.1. To access the Redirect module, click on the **Configuration** menu option.

9.7.1.2. Scroll down to the **Search and Metadata** section and click on **URL redirects**.

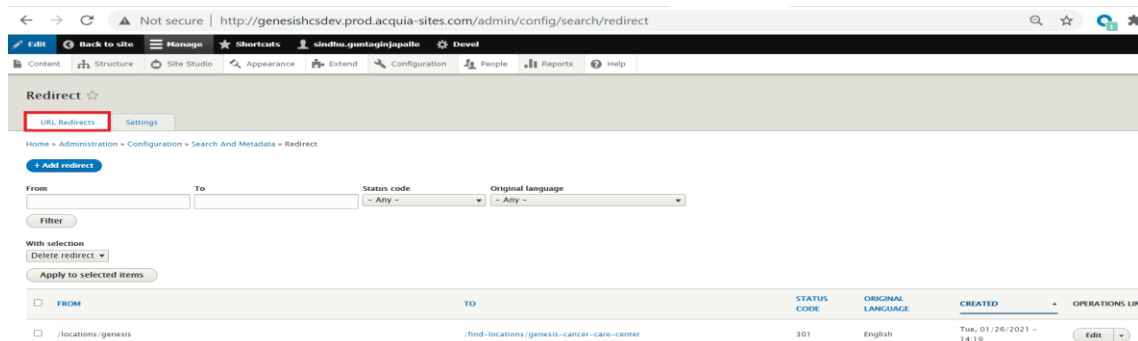
Figure 9-7-1-2



9.6.2. URL Redirects

Existing redirects can be edited, and new redirects can be added using the URL Redirects tab.

Figure 9-7-2



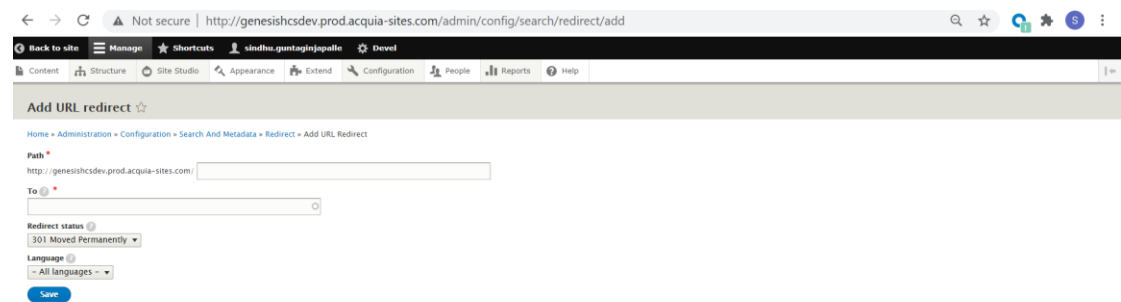
9.6.3. Node Redirects

9.7.3.1. When an editor updates the alias directly on the node

9.7.3.2. To add a new redirect, click on **Add redirect**.

9.7.3.3. Fill in the relative path to be redirected into the **Path** field. Add the full or relative path, or relative path to the node, into the **To** field. Select the **Redirect Status** and then Click **Save**.

Figure 9-7-3-3



9.6.4. Fix 404 Pages

Whenever a website user accesses a page that doesn't exist, resulting in a 404 page, the URL will be captured and added into a list on the Fix 404 pages tab.

9.7.4.1. To redirect the URL resulting in a 404 page, Navigate to **Configuration → Metadata → URL Redirects → Fix 404 pages**. Click on the **Add redirect** button that corresponds to the path in the list.

9.7.4.2. Fill in the relative path to be redirected into the **Path** field. Add the full or relative path, or relative path to the node, into the **To** field. Select the **Redirect Status** and then click **Save**.

9.6.5. Domain Redirects

An entire domain may be redirected using the Domain redirects tab. For a domain redirect to work, the DNS for that domain must be pointed to the IP address of the Drupal website. Fill out the From Domain, Sub Path, and Destination fields and then press Save to add a new domain redirect.

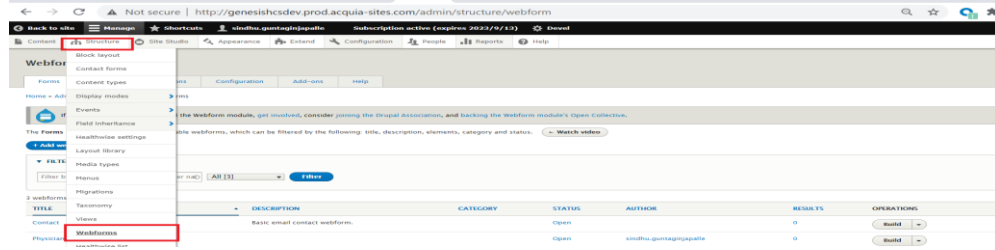
9.7. Intro to Forms

NOTE: The Webforms module is extremely robust, and this document is only an introduction with basic information. For more in-depth information, including documentation and videos, see [Drupal's documentation](#).

Forms are their own content page within Drupal.

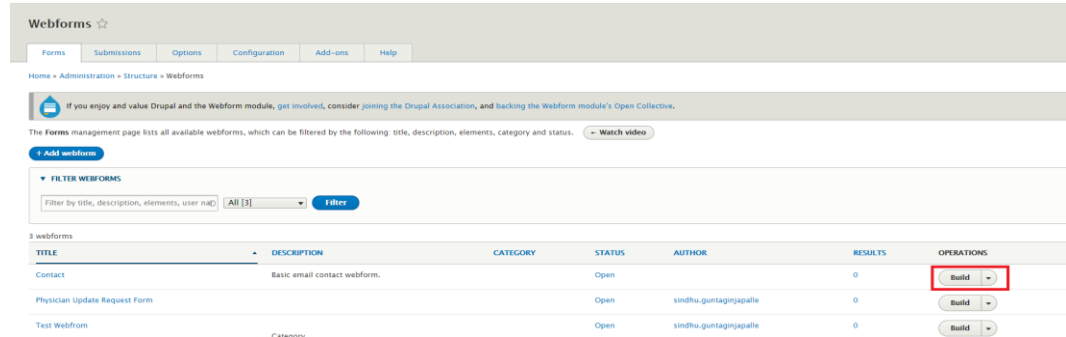
9.7.1. Hover over the **Structure** menu item, then click on **Webforms** from the dropdown

Figure 9-7-1



9.7.2. Existing forms can be edited using the options within the Build dropdown.

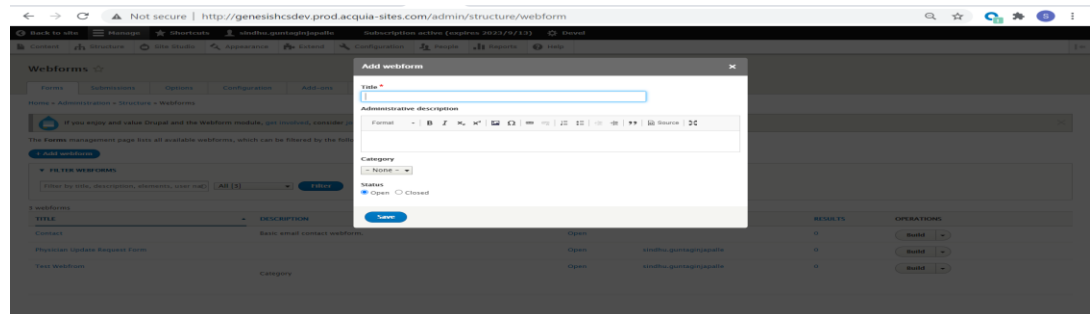
Figure 9-7-2



- **Build** – add or edit different fields on the form
- **Settings** – edit the form’s settings, such as Title, URL, and confirmation page URL
- **View** – see how the form will look on the front end
- **Test** – see how the form looks on the front end with prepopulated information, which can then be submitted to test the save actions and submissions
- **Duplicate** – create a new form by duplicating an existing form (this is useful when the new form will have many fields in common with an existing form)
- **Delete** – completely delete the form (if the form is deleted, it is not recoverable)

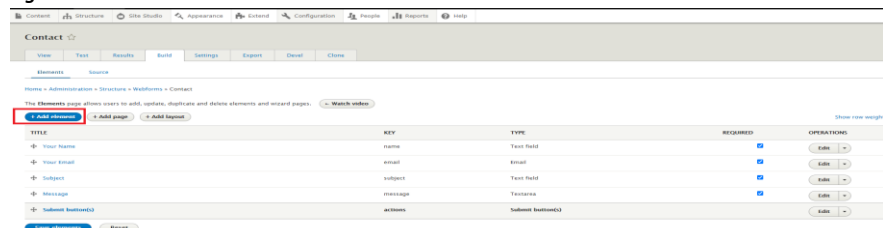
9.7.3. New forms can be added using the **Add webform** button, filling in the Title field, and then pressing the **Save** button.

Figure 9-7-3



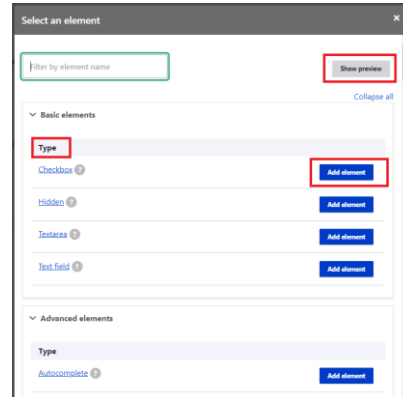
9.7.4. To add new elements, such as text, fields, and buttons to the form, press the **Add Element** button.

Figure 9-7-4



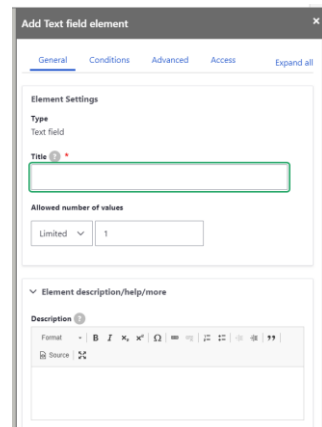
- 9.7.5. Select the element type from the list in the popup and press the corresponding **Add element** button.

Figure 9-7-5



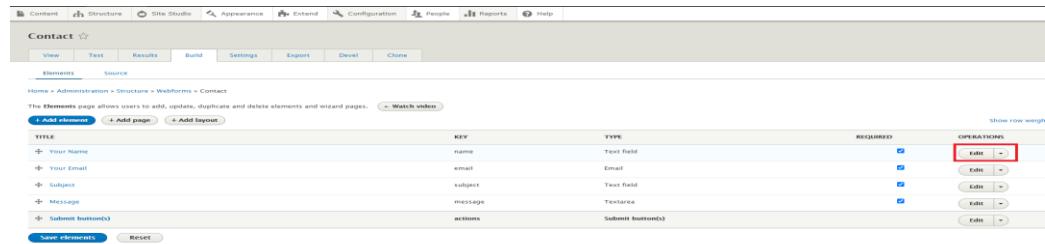
- 9.7.6. Fill in the Title field for the element within the Element Setting section of the **General tab**.

Figure 9-7-6



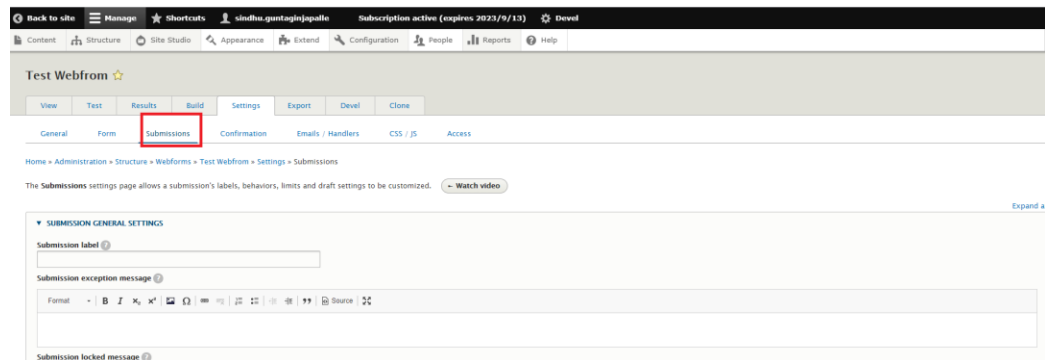
- 9.7.7. Other field options may also be set at this time. Such as: Allowed number of values (is only 1 field allowed, or can the user add multiple of the field if needed), Help text, Description, and if the field is Required for submission.
- 9.7.8. The **Conditions** tab allows conditions to be applied to a form on the field, such as “If the ‘other’ option is chosen by the user, an ‘explain’ field should appear”.
- 9.7.9. The **Advanced** tab contains advanced settings that can be applied to the form.
- 9.7.10. The **Access tab** allows the specific roles and users of who can submit or update submissions of the form.
- 9.7.11. When finished editing the settings for the field, press the **Save** button.
- 9.7.12. Once added, the field can then be edited again using the Edit button that corresponds to the field.

Figure 9-7-12



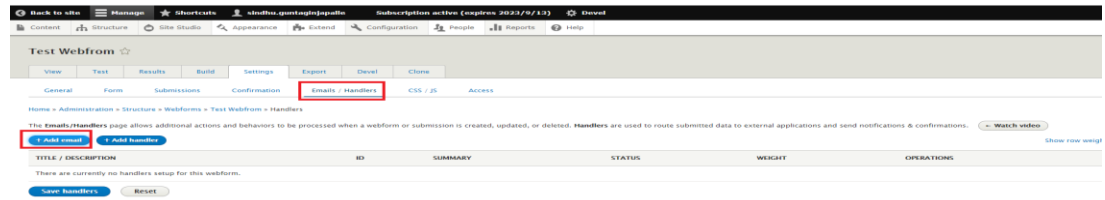
- 9.7.13. When finished editing the form elements, press the **Save** elements button.
- 9.7.14. Use the Webform URL alias field within the **General** section of the Settings tab to update the URL path for the form. Use the **Confirmation** page URL alias to edit the URL for the confirmation page that users will see after submitting the form.
- 9.7.15. The **Form** section of the Settings tab allows other updates to the form settings to be made. Such as the form status (**Open** or **Closed** for submission) and Form Status messages, if duplicate submissions or allowed or prevented, if the back button is available or disabled, etc.
- 9.7.16. The Submissions section of the Settings tab allows advanced submission configurations to be made, such as the total number of submissions allowed for a certain form.

Figure 9-7-16



- 9.7.17. The Confirmation section of the Settings tab is where the form submission confirmation settings are edited, including the confirmation message and if it should be displayed on a new page/URL or inline on the current form page.
- 9.7.18. The Emails/Handlers section of the Settings tab is where the email actions are set, including when an email should get sent and to who, along with what information the email message should include. This includes a conditional email, if a person should receive an email only if a certain field value has been selected and submitted.

Figure 9-7-18



- 9.7.19. The Access section of the Settings tab is where what Roles and Users should have access to the form and form submissions are set.
- 9.7.20. The Results tab is where the form submissions are accessed. Submissions can be viewed and edited within the Submissions section. The form submissions can be downloaded using the Download section. All submissions can be cleared for the form using the Clear section (once cleared the submissions are deleted permanently and are not recoverable).

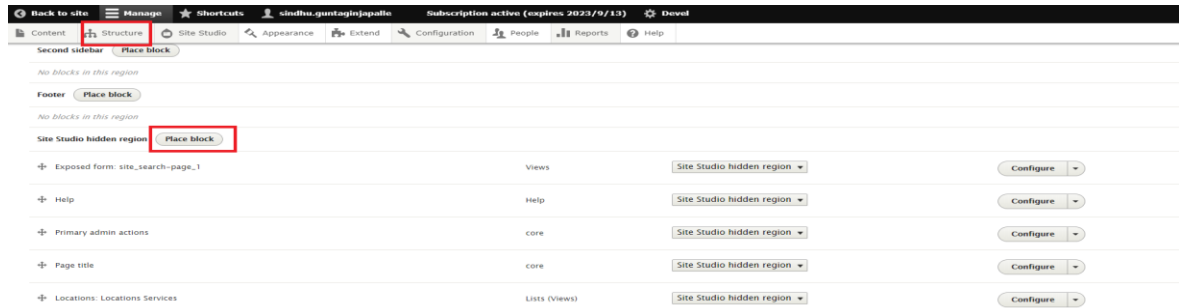
9.8. Add Webform on Page

In order to have the form created using webform module to be rendered on a page, the form should be converted into reusable component

Steps to Add form to Site Studio Components

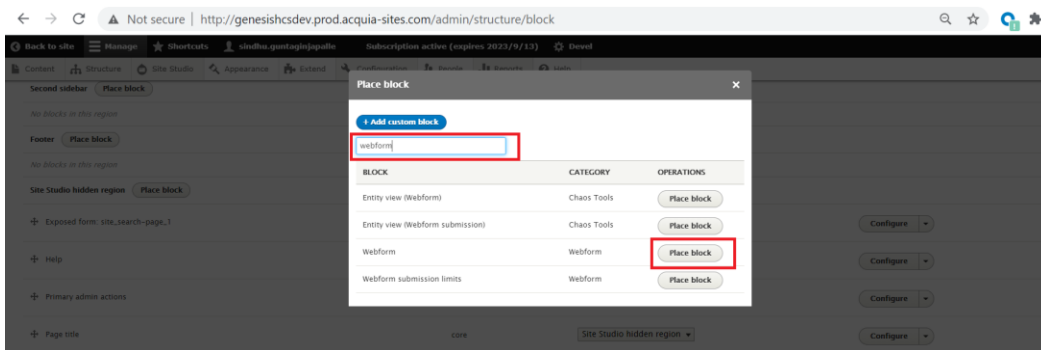
9.8.1. Navigate to **Structure** → **Block layout** → **SiteStudio Hidden Region**. Click on **Place block**

Figure 9-8-1



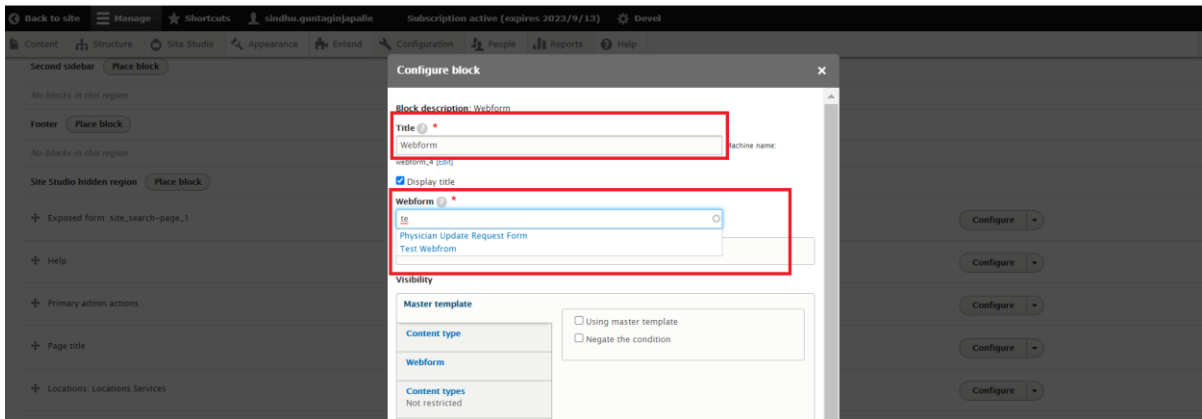
9.8.2. Modal is displayed with search bar and list of blocks. In the search bar type “Webform”. From the results select webform and click “Place block”

Figure 9-8-1



9.8.3. To configure the block, enter preferred block title and enter the form created in webform module. Click on **Save block** to save the config.

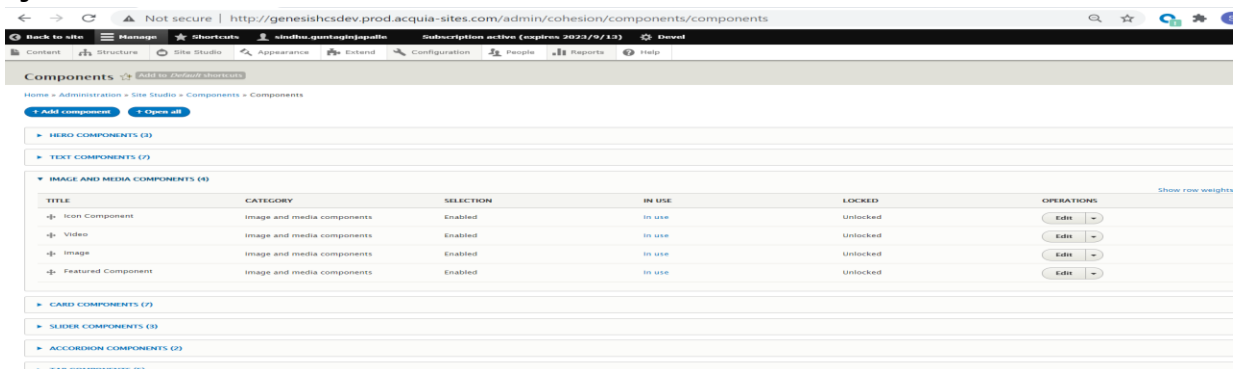
Figure 9-8-3



9.8.4. Block is added to Block layout in Site Studio Hidden region. Click on **Save Block** at the bottom of the page to save the block added.

9.8.5. To add the block to site studio component, Navigate to **Site Studio** → **Components** → **Add Components**

Figure 9-8-5



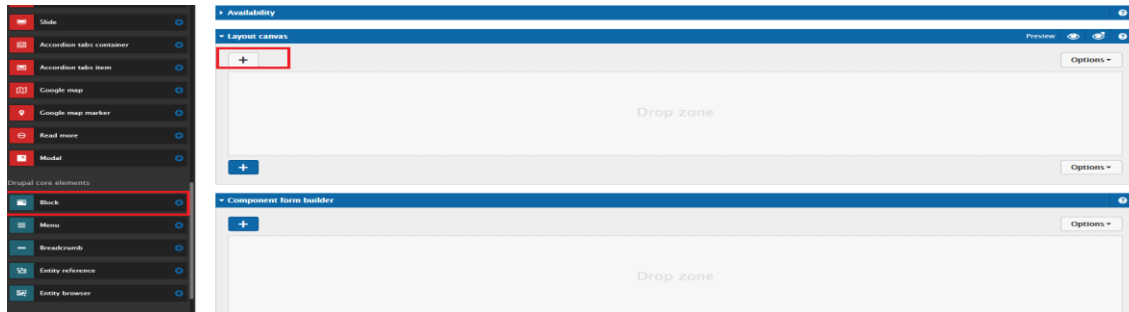
9.8.6. On the component page, select **Add Component**. Create Component page is displayed with following fields

- **Title** (Title of the Component)

- **Category** (Grouping the component – Select Dynamic Category from the drop down)
- **Availability** (Recommend not to make any changes here)
- **Layout Canvas** (click on + button to select Block under Drupal Core elements from side browser)

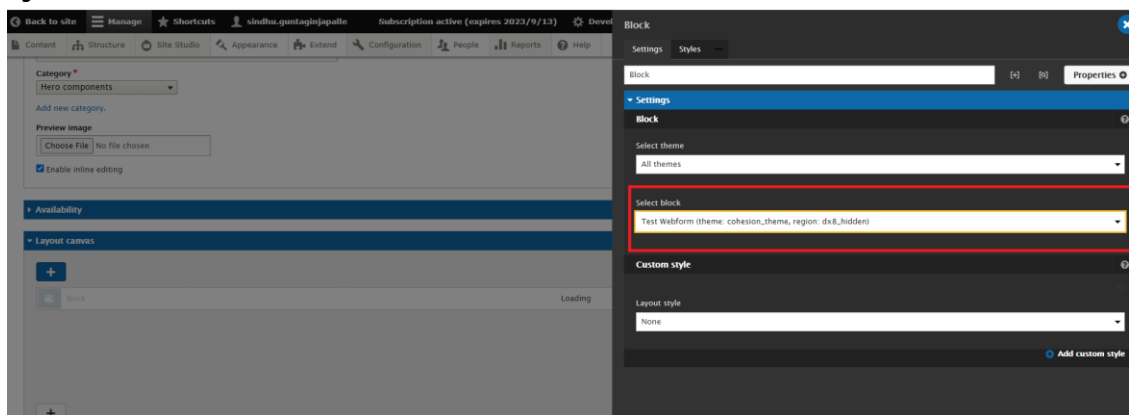
9.8.6. Add values to above fields. Edit the **block** element added to the layout canvas

Figure 9-8-6



9.8.7. To the right **Block** Form is displayed. Under select block section, select the form and click on **Apply** button

Figure 9-8-7



9.8.8. Component is created. Click **Save and continue**

9.8.9. To Verify if the component is added, go to a page with canvas layout. On the side browser the new component created should be visible under dynamic component.

9.8.10. Add the component to the layout and the form is rendered

9.8.11. The form is editable only from structure/webform. (NOTE – The form cannot be edited at page level.)

9.9. Embed Iframe

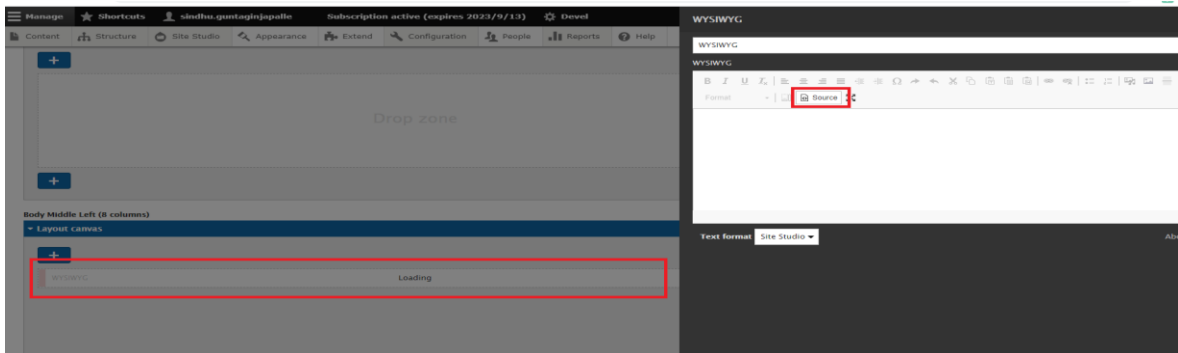
The "Full HTML" format on an out-of-the-box installation on Drupal 9 with CKEditor allows for IFRAME and JavaScript embeds. All Content types with Canvas layout field allows to insert embed code.

Steps to embed Iframe/JavaScript's

9.9.1. Select a content type with canvas layout field and create a page.

9.9.2. Add WYSIWYG component to canvas layout and edit the component. Plug the code in the source and click apply

Figure 9-9-2



9.9.3. **Save** the page and content should be rendered.

9.9. Logging Out

Once you have finished all your site updates and work, log out of the system. You will find the “Log out” link in the menu bar. Click on the “Logout” link and the system will log you out.

Glossary

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#)

[U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

A

Acquia Cloud

Acquia Cloud is a platform-as-a-service that provides everything you need to create, maintain, and optimize

high-quality Drupal websites. It's architected for resiliency in continuous delivery environments and designed to accelerate site and services deployment.

Acquia Cloud Site Factory (ACSF)

Acquia Cloud Site Factory is a cloud-based website management platform that allows users to create, manage, and deploy tens, hundreds, or even thousands of beautiful sites in record time from one unified dashboard.

Anonymous

A visitor to a Drupal website who is not currently logged in. Drupal considers any such visitor as being the anonymous user, with the user ID 0, and belonging to the anonymous user role.

API

An application programming interface (API) is a particular set of rules ("code") and specifications that software programs can follow to communicate with each other. Within Drupal there is the API Reference which contains documentation for developers. There is also a Form API and Field API

Article

One of two content types that are enabled in the standard installation profile. Articles are used for time-sensitive content like news, press releases or blog posts. This content type is called "Article" in Drupal 7 and later, and "Story" in earlier versions of Drupal.

Authenticated

A visitor to a Drupal website who is currently logged in. Such users always get an authenticated user role. They may have an additional role based on site specific user account configuration.

B

Basic page

One of two content types that are enabled in the standard installation profile. Typically, basic pages are used for static content that can (but are not required to) be linked into the main navigation bar. This content type is called "Basic page" in Drupal 7 and later, and "Page" in earlier versions of Drupal.

Base theme

A Base theme is a well-written set of CSS and template files that a theme developer can make use of in a new custom theme. Theme developers can make sub themes to override the default base theme. Some of the popular base themes include Zen, Omega and Adaptive Theme

Block

The boxes visible in the regions of a Drupal website. Most blocks (e.g. recent forum topics) are generated

on-the-fly by various Drupal modules, but they can be created in the administer blocks area of a Drupal site. See the documentation for more information on blocks.

Book

A set of pages tied together in a hierarchical sequence, perhaps with chapters, sections, subsections, and so on. You can use books for manuals, site resource guides, Frequently Asked Questions (FAQs), or whatever you'd like. To use books, enable the core Book module.

Breadcrumbs

The set of links, usually near the top of the page, that shows the path you followed to locate the current page. For example, it might show Home > Macadamia Nuts > Current Events > News Articles, meaning that you started at the home page, clicked on "Macadamia Nuts" in the menu, then selected "Current Events" in the sub-menu, and finally selected, "News Articles." The term breadcrumbs are borrowed from Hansel and Gretel, who left crumbs of bread along their path so they could find their way back out of the forest.

Bundle

A specific implementation of an entity type. For example, the node entity type has bundles called content types. Default node bundles are "page" and "article".

C

Cache

The core Drupal cache stores assembled pages and blocks for anonymous visitors in the cache tables in the database. Other popular Drupal caching options include boost, memcache, and authcache.

Callback

The mechanism for registering a path so that the correct function is fired when the URL is accessed. They are not shown in the menu. For understanding callbacks see Drupal's page serving mechanism.

Clean URL

A URL that does not contain code. By default, Drupal uses and generates URLs for your site's pages that look like "http://www.example.com/?q=node/83." By enabling clean URLs this will be rewritten to "http://www.example.com/node/83".

CMS

Content Management System. In the context of a Web site. a collection of tools designed to allow the creation, modification, organization, search, retrieval and removal of information.

Composer

The dependency manager used by drush, the Symfony framework, and Drupal 9. It is the preferred means of installing many Drupal based projects. See <http://getcomposer.org> for more details.

Configuration Management

Introduced with Drupal 9 as a way to keep track of the important details as you configure and revise your site. Drupal 9 comes with a file system-based configuration management system, which provides tools for transporting configuration changes such as new content types, fields, or views from a development server to a production server (or similar). It even lets you use version control for your configuration. Save your config data from the database to files. Learn more about basic configuration management concepts.

Content

The text, images, and other information on a web site. Besides nodes there is more content on a typical Drupal site, such as comments and file attachments.

Content Type

Every node belongs to a single “node type” or “content type”, which defines various default settings for nodes of that type, such as whether the node is published automatically and whether comments are permitted. Common "Content Types" that just about any website would have include: blog post and page. Content types can have different fields and modules can define their own content types. The core Drupal Book and Poll modules are two examples of modules that define content types.

Context

Multiple meanings depending on use.

- Context: A popular contrib module which allows you to vary the theme, block layout, menus, etc. based on conditions such as the content type, current user, etc. It is frequently used to provide variety in the user experience across different sections of your site.
- A key concept of the ctools module which was taken from Panels. Contexts provide a consistent wrapper API for various objects (nodes, users, etc.). This greatly simplifies the coding necessary to make user interface functionality aware of the objects that could influence its behavior.

Contrib

Contributed. Modules or themes that are not part of the core Drupal product. Contributed modules and themes are available for separate download from the modules and themes sections of Drupal.org downloads. These are separate from the Drupal “core”, although over time they can become part of it. Similar concepts exist in other software and are sometimes called “plugins”, “add-ons” or “extensions”.

Core

The files and modules included with the Drupal project download.

Core Committers

Drupal developers that review proposed changes to the Drupal core and maintain code. They are the only ones who have write access to the core Git repository.

Core Contributor

Developers who contribute code patches or documentation for the Drupal core. Contributions are peer reviewed and then evaluated by the core committers.

Critical Path

The code that is run when serving a cached page.

Cron

A command scheduler that executes commands or scripts (e.g. scripts to backup a database) automatically at specified time and date intervals. Drupal uses a “cron job” to perform periodic tasks that help Drupal to run smoothly and efficiently.

D

D6

Drupal 6. Any version 6 of Drupal, including all minor versions 6.x.

D7

Drupal 7. Version 7 of Drupal, which includes any minor version, e.g. Drupal 7.0, Drupal 7.23

D8

Drupal 8. Version 8 of Drupal, which includes any minor version, e.g. Drupal 8.0, Drupal 8.1. D8 can also refer to beta versions, e.g. Drupal 8.0.0-beta10 or versions still in development stage, e.g. Drupal 8.x-dev

D9

DA

Drupal Association. An organization dedicated to helping the open-source Drupal project flourish.

Delta

An index for fields, blocks, etc., of the same type.

DO, D.O.

Drupal.org. The website of Drupal.

Distribution

A single downloadable archive containing Drupal core, contributed modules, themes, and pre-defined configuration. A distribution provides site features and functions for a specific type of site. They make it possible to quickly set up a complex, use-specific site in fewer steps than if installing and configuring elements individually. An index of distributions is available at the Distributions page.

DrupalCon

The semi-annual conference dedicated to gathering Drupal practitioners. It alternates between a North American location and a European location.

Druplicon

The Drupal mascot. It is a neologism formed from joining the words “Drupal” and “icon”.

Drush

A command line shell and scripting interface for Drupal written in PHP. More information is available at the [Drush project page](#).

E

Entity

Any defined chunk of data in Drupal. This includes things like nodes, users, taxonomy terms, files, etc. Contributed modules can define custom entities. Each entity type can have multiple bundles.

F

FAPI

The Drupal Form API.

Feature

Drupal configuration exported into code using the Features module. In Drupal 7 and 8, Features has become the standard way of exporting and versioning configuration that is stored in the database so that it can be moved from development to QA to production in a repeatable manner.

Field

Elements of data that can be attached to a node or other Drupal entities. Fields commonly contain text, image, or terms.

Filter

A tool for stripping out HTML, PHP, JavaScript, and other undesirable elements from content before pages are displayed. Other filters add formatting and features such as smilies. It is possible to create custom filters that allow or forbid only those tags you wish. More information is available at the [Text filters and Input Formats page](#).

Flag

A way to mark an information item for selection for further processing on Drupal.org this is done for flagging issues.

Fork

A copy of source code from one software package that receives independent development, thus creating a distinct piece of software.

G

GDO

Groups.drupal.org. The site that serves the Drupal community by providing a place for groups to organize, plan and work on projects. Real world local user groups in particular are encouraged to setup their online presence at GDO.

Git

A version control system used by Drupal code contributors to coordinate their individual code changes. Git records everyone's changes to a given project in a directory tree called a git repository. For more information, see the Git documentation.

GUI

Graphical user interface. A program interface that takes advantage of the computer's graphics capabilities to make the program easier to use.

H

HEAD

The current development version of core or a module.

Headed/headless Drupal

A Drupal implementation is headed if Drupal is the display layer as well as the back end. It is headless, Drupal is not the display layer (does not render the pages).

Hook

A PHP function that is named `foo_bar()`, where "foo" is the name of the module (whose filename is thus `foo.module`) and "bar" is the name of the hook. Each hook has a defined set of parameters and a specified result type. See also theme hook.

Human Readable

Also, user-friendly name. The text string used to identify a resource as displayed in the user interface, as opposed to the machine name used for internal purposes of the computer program.

I

Input Format

A tool for defining the processing that happens to user-entered text before it is shown in the browser. Usually different user roles are given permission to use different input formats depending on how much

they are trusted. For those roles, the input format may often be available as an option that shows up underneath the body of a node edit form. For more information, see the Text Filters and Input Formats documentation.

i18n

Numeronym for internationalization, replacing the 18 middle letters with “18”. Internationalization refers to enabling translations and other-language support (including alternate character sets and right-to-left rendering) in computer systems.

IRC

Internet Relay Chat. A network protocol that allows people to chat in real time over the Internet. Drupal discussions are often going on in The Drupal IRC Channels

Issue

A unit of work to accomplish an improvement in a data system. An issue could be a bug, a requested feature, task, missing documentation, and so forth. The Drupal community uses the issue queue to work as a team. If you need help with a specific project, whether it is a module or theme, you should go to the issue queue.

J

JDO

The Drupal Jobs site.

L

l10n

Numeronym for localization, replacing the 10 middle letters with “10”.

LAMP

Linux, Apache, MySQL and PHP. LAMP is an interoperable group of open-source computer programs that form the most common environment to run Drupal on.

Legacy Code

A no-longer supported version of Drupal. The term can also mean code inserted into modern software for the purpose of maintaining an older or previously supported feature.

Log

A list of recorded events. A log may contain usage data, performance data, errors, warnings and operational information. Drupal’s events are logged by the modules dblog and syslog.

Library

A library of code from a third party. libraries is a module that will help you manage and load these.

M

Machine Name

Also machine-readable name. The text string used by the computer to identify a resource, as opposed to the human readable name shown in the user interface.

Maintainer

Single community person, which is responsible for the module, also has the right to commit a patch into module. Can be multiple people per module.

Menu

In Drupal, the term refers both to the clickable navigational elements on a page, and to Drupal's internal system for handling requests. When a request is sent to Drupal, the menu system uses the provided URL to determine what functions to call.

Migrate

Moving content from other sources into Drupal or from Drupal 6 or Drupal 7 into Drupal 8. See [Introduction to migrate D6 to D8](#)

Module

Software (usually PHP and CSS) that extends Drupal features and functionality. Drupal distinguishes between "core" and "contributed" modules.

N

NID

Node ID. The unique identifier for each node. It can be found in the path to the node. For example, a node with path, "<http://drupal.org/node/937>", has a node ID of "937".

Node

A piece of content in Drupal, typically corresponding to a single page on the site, that has a title, an optional body, and perhaps additional fields. Every node also belongs to a particular content type and can additionally be classified using the taxonomy system. Examples of nodes are polls, stories, book pages and images.

Node Type

See content type.

O

Object Oriented Programming

The focus of object-oriented programming is to break down a programming task into objects that expose behavior (methods) and data (members or attributes) using interfaces. The most important distinction between procedural and object-oriented programming is that procedural programming uses procedures to operate on data structures, object-oriented programming bundles the two together so an "object", which is an instance of a class, operates on its "own" data structure.

P

Page

See Basic Page. People also use the word "page" to mean a web page (i.e., a page you get to by navigating to a specific URL on a web site).

Parent

See child.

Patch

A small piece of software designed to update or fix problems with a computer program or its supporting data. This includes fixing bugs, replacing graphics and improving the usability or performance. For more information, see the patch documentation.

Path

In Drupal terms, a unique, last part of the URL for a specific function or piece of content. For instance, for a page whose full URL is <http://example.com/?q=node/7>, the path is "node/7". Drupal can use clean URLs if the Path module is enabled, which would change the full URL in this example to <http://example.com/node/7>; the path would still be "node/7".

Permission

In Drupal, a tool for controlling access to content creation, modification and site administration at the application level. Administrators assign permissions to roles, then assign roles to users. The first user of a Drupal site (User1) automatically receives all permissions. In operating systems like UNIX, permissions are security settings restricting or allowing users to access information or perform certain functions at the operating system level. In the case of files on UNIX systems, there are three types of permissions: read, write and execute.

Platform

The development of a system where code distribution is centrally controlled and consistent across all sites within the system.

Platform Governance

The process and procedures put in place to govern any changes to the Platform. Typically has representation from both IT and Business owners.

Procedural Programing

The focus of procedural programming is to break down a programming task into a collection of variables, data structures, and subroutines. The most important distinction between procedural and object-oriented programming is that procedural programming uses procedures to operate on data structures, object-oriented programming bundles the two together so an "object", which is an instance of a class, operates on its "own" data structure.

Published

The state of a node that can be viewed by visitors to the website. To easily hide nodes from the public (i.e. anonymous role), make the node "Unpublished" by unchecking "Published" in the node add/edit form. Other states can be added to a content publishing workflow based on business requirements.

Q

Queue

A job management technique. Jobs waiting in a line (queue) are usually processed on a first in, first out basis or by priority, if specified. The Drupal community uses the issue queue to work as a team. If you need help with a specific project, whether it is a module or theme, you should go to the issue queue.

R

Reference Field

A type of field that allows authors to create a relationship between an entity and one or more other entities. For example, authors might "tag" an article with taxonomy terms using a Term Reference field. Other reference fields can be used to define other kinds of relationship (for example, between nodes and other nodes, or nodes and users). Depending on the Drupal version and/or contributed modules installed, these might be called Entity Reference, Node Reference or User Reference fields.

Region

Defined areas of a page where content can be placed. Basic regions include: Header, Footer, Content, Left sidebar, Right Sidebar. Different themes can define different regions, so the options are often different per-site. Content is assigned to regions via blocks. They can be ordered by weight within regions to define the order in which they display.

Render Array

Render arrays are the basic building blocks of Drupal content. In Drupal 7 and 8, render arrays provide a structured way to programmatically alter content before it is displayed. Further details can be read on the Render Arrays documentation page.

Roles

Sets of permissions that can be applied to individual users. Users can belong to more than one role. Two

roles, authenticated users (those users that sign up for an account) and anonymous users (those either without an account or not logged in), are supplied by default with Drupal installations. Drupal allows creating additional roles based on business requirements.

Reroll

Reimplementing of code on top of HEAD of a code repository, mostly because HEAD has changed. Learn more.

RSS

Really Simple Syndication. A family of Web feed formats used to publish frequently updated content such as blog entries, news headlines or podcasts. An RSS document (which is called a “feed” or “web feed” or “channel”) contains either a summary of content (“teaser”) from an associated web site or the full text. RSS is one of the many ways of connecting a Drupal website with external sites, systems and data.

RTBC

Reviewed and tested by the community. RTBC is one of the statuses given to issues in the issue queue.

RTL

Right-to-left. Languages such as Arabic and Hebrew run from right to left across a written page and need to do the same on a web browser. RTL support can be problematic in theme design, but is possible, as explained in the Drupal theme guide for RTL.

S

Sprint

In the Scrum method of Agile software development, work is confined to a regular, repeatable work cycle, known as a sprint or iteration.

Story

A user story is a tool used in Agile software development to capture a description of a software feature from an end-user perspective. The user story describes the type of user, what they want and why. A user story helps to create a simplified description of a requirement.

Symfony

A PHP project with two outputs (See <https://symfony.com/>):

1. "Symfony 2 Components": A set of reusable PHP components; some of these Symfony components are used in Drupal 8
2. "Symfony 2 Framework": A full framework which also uses the Symfony Components, Silex, and many other projects use these core components

Take care to clarify references to Symfony 2 rather than Symfony version 1 which uses a different architecture and Symphony CMS which is unrelated project.

T

Tag

See term.

Tar.gz

Tape archive. A file format and the name of the program used to handle such files. Drupal projects are distributed in Zip and tar.gz formats. A *.tar.gz file is a combination of two technologies: Tar - create the file and Gzip - compress the file (similar to zip).

Taxonomy

In Drupal, "Taxonomy" is the name of a powerful core module that gives your sites use of terms. In Drupal, these terms are gathered within vocabularies which the Taxonomy module allows you to create, manage and apply.

Teaser

A short introductory sentence or paragraph about a piece of content that informs readers about the subject of the content. By default, the first paragraph or two of the content is used (there is a setting for how much), usually with a link to the complete node.

template

A file to express presentation (vs. program logic). Templates are mostly HTML with special PHP variables. The variables in templates substitute in values provided by a theme engine.

Term

An organizational keyword, known in other systems as categories or metadata. A term is a label that can be applied to a node. They are also known as tags.

Testbots

A continuous integration service for testing patches submitted to project issues on Drupal.org. These are maintained by the Drupal.org Infrastructure team.

Theme

A file or collection of files (PHP, INFO, CSS, JPG, GIF, PNG), which together determine the look and feel of a site. A theme contains elements such as the header, icons, block layout, etc. Drupal modules define themeable functions which can be overridden by the theme file. There are additional themes available in the themes section of downloads.

Theme Engine

A set of scripts that interprets code and makes theming a site easier. These scripts take the dynamically generated content and output it to HTML. Drupal 7 has three theme engines in addition to being able to write a theme that bypasses the theme engine. The default theme engine is phpTemplate.

Drupal 8 has Twig theme engine.

Theme Hook

An identifier used by the calls to the theme () function to delegate rendering to a theme function or theme template. Modules which extend Drupal may declare their own theme hooks to allow themers to control the markup of that module in their theme. Theme hooks are distinct from API hooks, although similar in concept.

Trigger

Defined by modules, triggers typically result from some characteristic change in an entity maintained by a module. Some examples of triggers are deleting content, adding a comment that a user has logged in, or adding a term. In addition to the triggers provided by the Drupal core modules, triggers may be added by installed contributed modules.

Triage

A new bug or issue is assigned a priority based on its severity, frequency, risk and other predetermined factors, borrowed from medical term triage.

Twig

Twig is a template engine for the PHP programming language. Twig is implemented in Drupal 8. (See <http://twig.sensiolabs.org/>)

U

UID

User ID. The unique identifier for each user. It can be found in the path to the user profile, e.g. "http://drupal.org/user/1"

Unpublished

See published

Update

Moving from one minor release to another, e.g. moving from Drupal 7.12 to Drupal 7.14. See Upgrading from previous versions.

Upgrade

Moving from one major release to another, e.g. moving from Drupal 7 to Drupal 8. See Upgrading from previous versions.

URL

Uniform resource locator. The address that defines the route to locate an object on an Internet server. Generally, the syntax for a URL contains the scheme, host-name, port, path and filename, e.g. <http://www.drupal.org/node/937>

User1

The first user created on installation and granted additional (all) permissions. This user is referred to as the site maintenance account in Drupal 7.

UX

User experience. An umbrella term referring to the overall experience and satisfaction a user has when using a website. It is important to note that this “includes only what the user perceives and not all that is presented.”

V

Varnish Configuration Language

In common parlance, it's used to refer to the configuration file on varnish Acquia has a standard one we deploy to the load balancers, but it's possible for a customer to have a custom one deployed to a dedicated load balancer.

Views

A Drupal 8 core module (contributed module in D7) which allows site developers a simple graphical interface for creating lists of various Drupal objects; most notably users and nodes. Views permits selection of specific fields to display, filtration against various node attributes, choice of basic layout options (i.e. list, full nodes, teasers, etc.), and other more advanced features. Many Drupal sites use Views extensively.

Vocabulary

A vocabulary is a collection of terms. [Click here to read more.](#)

W

Weight

A term used by Drupal to define the priority or order in which a function is processed, or a block / node is displayed. The weight field may be adjusted dynamically using a drag-and-drop interface. Note: A lower weight value (-10) will float to the top of lists, while heavier (+10) weights will appear lower in lists.

Widget

A field API and CCK term used to refer to the HTML form element used to collect the input for the field from the user.

WYSIWYG

What You See Is What You Get. An acronym used in computing to describe a method in which content is edited and formatted by interacting with an interface that closely resembles the final product.

Z

Zebra Striping

Alternating colors behind rows of data. This is often used in tabular data where rows of data alternate background colors between white and a shade of gray.

Zip

The zip file format is a data compression and archive format. A zip file contains one or more files that have been compressed, to reduce file size. Drupal core and modules are offered both in the zip and tar format.

