



2019

# SCCE Content Entry Deck



Clockwork

## Links

---

### Staging Site URLs:

<https://stage.corporatecompliance.org/>

<https://stage.hcca-info.org/>

### Staging Site Login URLs (use a CV account):

<https://stage.corporatecompliance.org/member>

<https://stage.hcca-info.org/member>

### ClearVantage (CV) site:

<https://hcca.cvsapphire.com/office/cgi-bin/office.dll/home>

## Table of Contents

---

- 4** Definitions & Vocabulary
- 12** Conference & Conference Page
- 25** Certification Page
- 30** Flexible Full-Width Page & Flexible Sidebar Page
- 33** Global Shared Content
- 38** Publication Issue Page
- 53** Resource Library Item
- 59** News
- 64** Surveys
- 69** Menus



# Definitions & Vocabulary

## Definitions & Vocabulary

---

### Page

Any piece of content that has its own URL and can be viewed as a web page.

For example, any content created using the Conference Page, Flexible Full-Width Page, or a Flexible Sidebar Page content type.

These pages are usually placed in the navigation and linked to from other pages.

## Definitions & Vocabulary

---

### **Component**

Pieces of content on a page that can be stacked on top of each other. The most common component is “Basic Column.” When placed on to a page, this component provides up to three horizontal columns for content. The content types Conference Page, Flexible Full-Width Page, and Flexible Sidebar Page use components to display content.

Some content types will have less flexibility and do not allow certain component functionality. Instead, they will have specific content fields.

## Definitions & Vocabulary

---

### **Content Type**

The structure of the piece of content being created. Each type of content can have different settings: the types of components included, URL settings, etc. When creating new content, you'll pick what “type” it is first. For example: Advertisement, Flexible Sidebar Page, or Global shared content.

Drupal definition:

[https://www.drupal.org/docs/user\\_guide/en/glossary.html#glossary-content-type](https://www.drupal.org/docs/user_guide/en/glossary.html#glossary-content-type)

## Definitions & Vocabulary

---

### **Taxonomy**

A way to classify and process types of content. We use taxonomies to differentiate the content between types of publications.

Drupal definition:

[https://www.drupal.org/docs/user\\_guide/en/glossary.html#glossary-taxonomy](https://www.drupal.org/docs/user_guide/en/glossary.html#glossary-taxonomy)



## Definitions & Vocabulary

---

### **Node**

A specific Drupal term referring to a piece of content in Drupal; typically corresponding to a single page on the site. Every node has a content type. For example the homepage is a node, using the content type “Flexible Full-Width Page.” Typically, we refer to this as a page on the site. The term node is used commonly by site developers and site administrators. A node can also refer to an image, PDF, Conference, etc.

Drupal definition:

<https://www.drupal.org/docs/7/understanding-drupal/glossary#node>



# Content Types

## Content Types

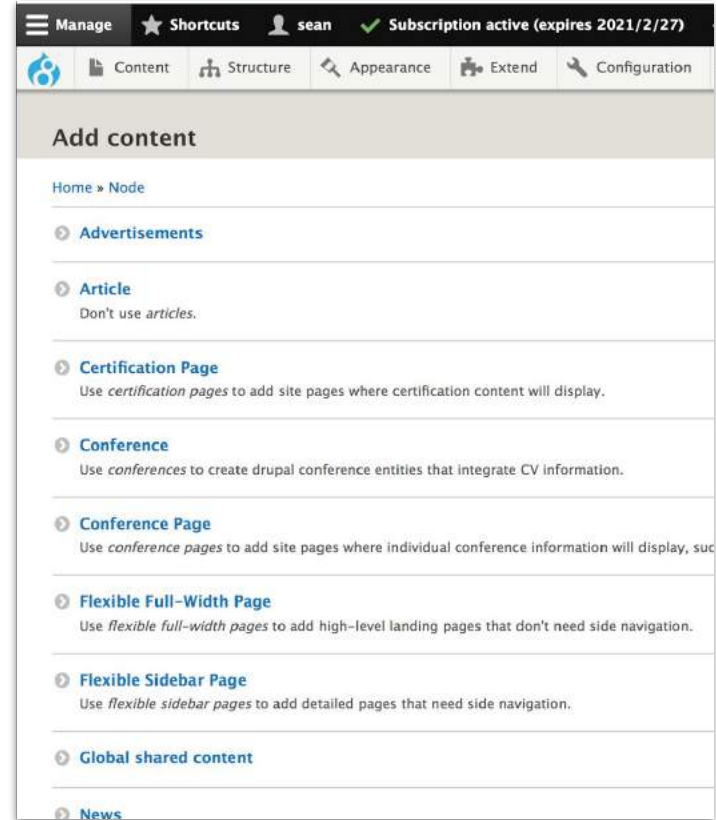
---

Both SCCE and HCCA will come with a variety of “Content Types” to display pages across the site.

Certification Page, Conference, Conference Page, Flexible Full-Width Page, Flexible Sidebar Page, etc. are all different content types.

<https://stage.corporatecompliance.org/node/add>

<https://stage.hcca-info.org/node/add>





# Conference & Conference Page

## Conference: Getting Started

---

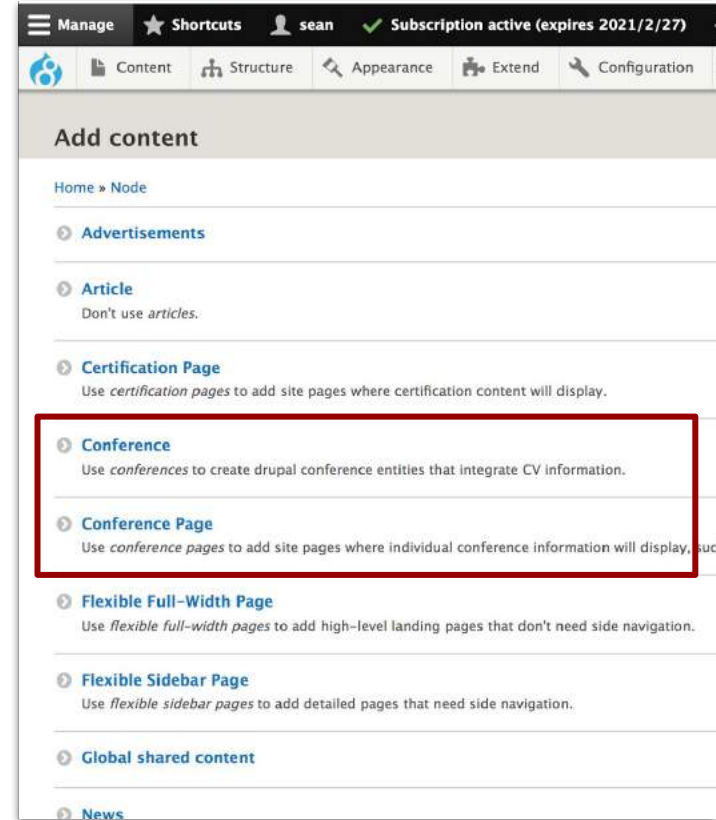
Conferences require creating two items in Drupal.

A “Conference” and a “Conference Page” Content Type.

Conferences require a CV Event ID.

<https://stage.corporatecompliance.org/node/add>

<https://stage.hcca-info.org/node/add>



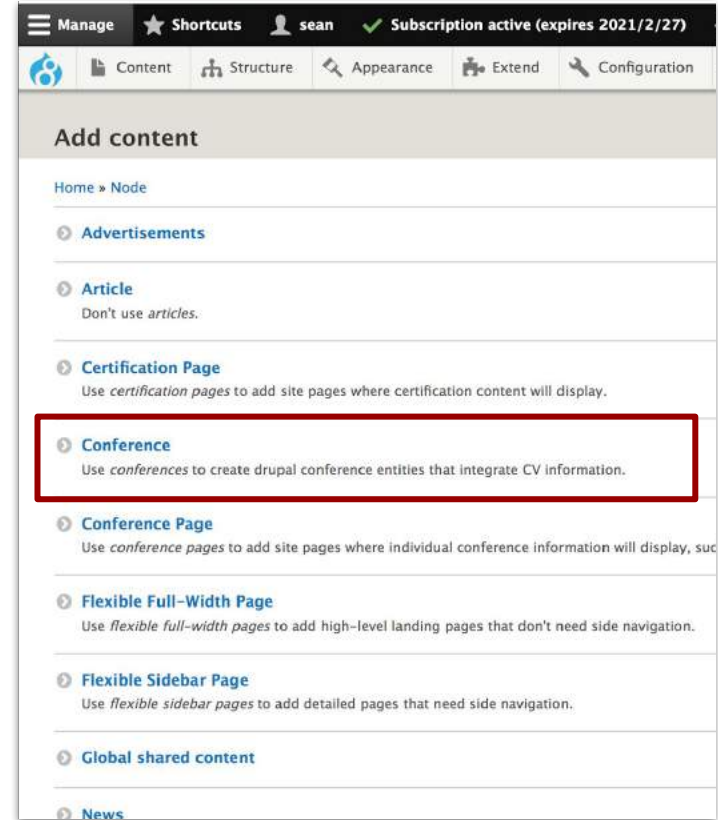
## Conference: Create a Conference

---

First, create a “Conference”

<https://stage.corporatecompliance.org/node/add/conference>

<https://stage.hcca-info.org/node/add/conference>



The screenshot shows the Drupal administration interface. At the top, there is a navigation bar with 'Manage', 'Shortcuts', a user profile for 'sean', and a 'Subscription active (expires 2021/2/27)' status. Below this is a secondary navigation bar with icons for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main content area is titled 'Add content' and shows a breadcrumb 'Home » Node'. A list of content types is displayed, each with a chevron icon and a description. The 'Conference' option is highlighted with a red rectangular box. The 'Conference' option includes the text: 'Use *conferences* to create drupal conference entities that integrate CV information.'

Manage ★ Shortcuts sean ✓ Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Add content

Home » Node

- Advertisements
- Article  
Don't use *articles*.
- Certification Page  
Use *certification pages* to add site pages where certification content will display.
- Conference**  
Use *conferences* to create drupal conference entities that integrate CV information.
- Conference Page  
Use *conference pages* to add site pages where individual conference information will display, such as...
- Flexible Full-Width Page  
Use *flexible full-width pages* to add high-level landing pages that don't need side navigation.
- Flexible Sidebar Page  
Use *flexible sidebar pages* to add detailed pages that need side navigation.
- Global shared content
- News

## Conference: Add Conference Detail

---

Fill out any details related to the Conference; you can leave the “Conference Home Page Link” field blank for now.

**Click “Save.”**

Manage Shortcuts sean Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create Conference

Home » Node » Add content

Add a unique conference entity name that that will be referenced to access conference data. The

**Conference Entity Name \***

ClearVantage Event ID

**START DATE**

01/25/2019 12:00:00 AM

**END DATE**

01/25/2019 11:59:59 PM

City

State or Pr

Add a state

Country

**Tip: You can get the CV Event ID from your current site URL**

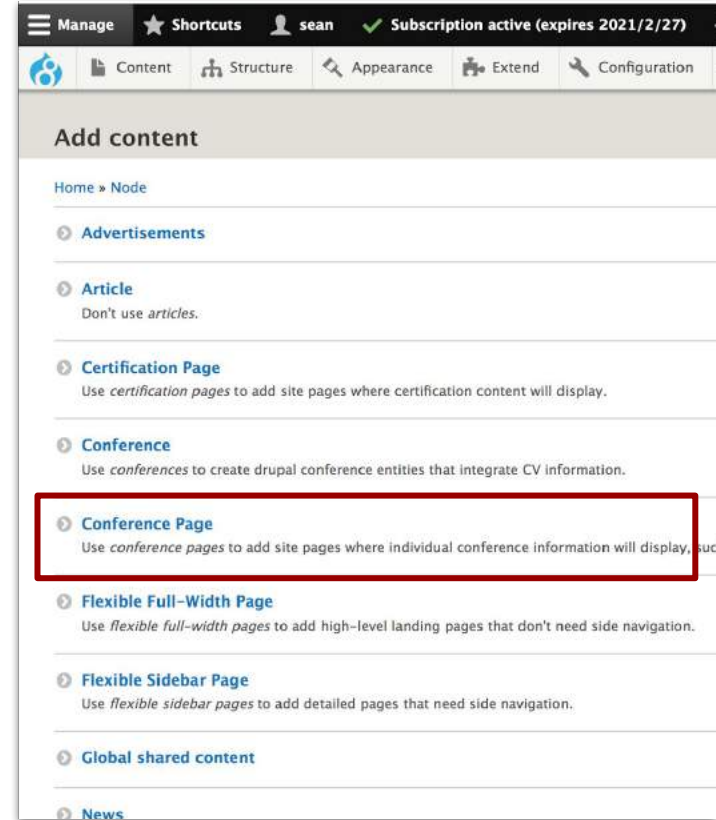
## Conference: Create a Conference Page

---

Next, create a “Conference Page”

[https://stage.corporatecompliance.org/node/add/conference\\_pages](https://stage.corporatecompliance.org/node/add/conference_pages)

[https://stage.hcca-info.org/node/add/conference\\_pages](https://stage.hcca-info.org/node/add/conference_pages)





## Conference: Add Conference Page Detail

Fill out any details related to the Conference Page. Select the Conference you created previously with the “Conference Entity Name” section.

Click “Save.”

**Tip:** The Page Name can be different than the Conference name. This will appear in the URL and breadcrumbs. This should be unique from all other conferences.

The screenshot shows the 'Create Conference Page' form in a web application. The form is titled 'Create Conference Page' and has a breadcrumb trail 'Home » Node » Add content'. Below the title, there is a note: 'Add a page name that will be used in the page URL and web browser label.' The form contains several sections: 'Page Name \*' with an input field; 'Conference Header' with a dropdown menu showing 'CONFERENCE ENTITY NAME'; 'Conference Header Height' with a dropdown menu set to 'Condensed'; and 'Optional Page Headline' with an input field. A red box highlights the 'Page Name' and 'Conference Header' sections. The top navigation bar includes 'Manage', 'Shortcuts', 'sean', and 'Subscription active (expires 2021/2/27)'. The bottom navigation bar includes 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'.

**Tip:** Institute Conference pages should use the large “Display Style” for the “Conference Header.”

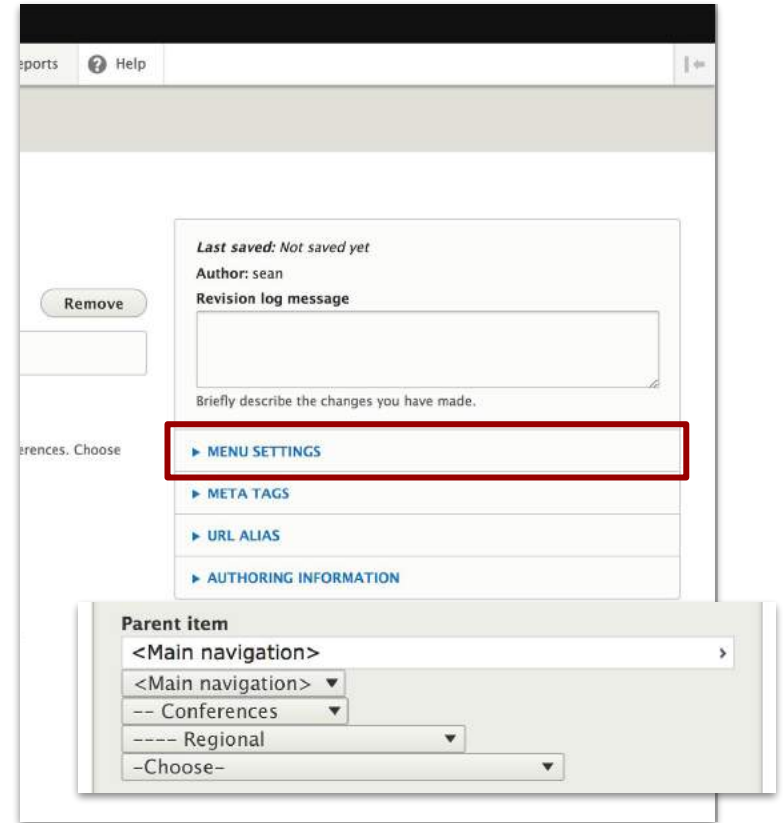
## Conference: Add a Menu Link

---

To add a menu link, navigate to the sidebar on the right-hand of the screen.

Select “Menu Settings” and toggle the “Provide a menu link” checkbox. Under “Parent Item” use the dropdowns to find the correct type of conference and select that.

Click “Save.”



## Conference: Add a Homepage

---

Under “Condensed-Width Content,” select components to add to your page.

Selecting “Basic Columns” will provide a way to add up to three columns of text and is commonly used throughout the site.

Click “Save.”

The screenshot shows the 'Create Conference Page' configuration interface. The top navigation bar includes 'Manage', 'Shortcuts', 'sean', and 'Subscription active (expires 2021/2/27)'. The main navigation includes 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The page title is 'Create Conference Page'. The breadcrumb is 'Home » Node » Add content'. The instructions are 'Add a page name that will be used in the page URL and web browser label.' The 'Page Name' field is empty. The 'Conference Header' section has a dropdown menu set to 'CONFERENCE ENTITY NAME'. The 'Conference Header Height' section has a dropdown menu set to 'Condensed'. The 'Optional Page Headline' section has an empty text field. The 'Condensed-Width Content' section is highlighted with a red box and contains the text 'No Paragraph added yet.' and 'Add content that appears next to the sidebar navigation. When making conference detail pages, add all c'. Below this is a button 'Add Billboard' and a dropdown menu set to 'Condensed-Width Content'. The 'Optional Sidebar Content' section has the text 'No Paragraph added yet.' and 'Add brief content that appears below the sidebar navigation, such as a conference brochure.'. The 'Optional Full-Width Content' section has the text 'No Paragraph added yet.' and 'Add icon card element that appears below the sidebar navigation, such as a conference brochure.'.

## Conference: Conference Page Components

---

Here is a full list of all the available components for a Conference page, located in the “Condensed-Width Content” section.

Use these to create page layouts that deviate from the norm.

**Click “Save.”**

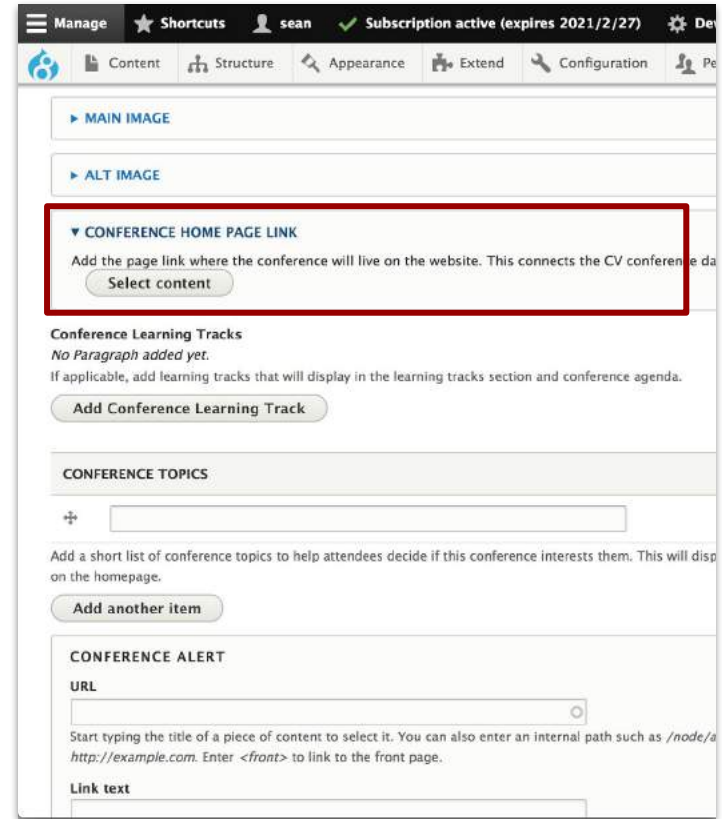


## Conference: Create the Homepage Link

---

When you have finished adding content to your “Conference Page,” go back to the “Conference” content, and add a “Conference Home Page Link” – choosing the page you just created.

**Click “Save.”**



The screenshot shows the Drupal configuration interface for a conference page. The top navigation bar includes 'Manage', 'Shortcuts', a user profile for 'sean', and a 'Subscription active (expires 2021/2/27)' indicator. The main content area is divided into several sections: 'MAIN IMAGE', 'ALT IMAGE', and 'CONFERENCE HOME PAGE LINK'. The 'CONFERENCE HOME PAGE LINK' section is highlighted with a red rectangular box. It contains a text field with the placeholder 'Add the page link where the conference will live on the website. This connects the CV conference da...' and a 'Select content' button. Below this are sections for 'Conference Learning Tracks' (with a 'No Paragraph added yet.' message and an 'Add Conference Learning Track' button), 'CONFERENCE TOPICS' (with an 'Add another item' button), and 'CONFERENCE ALERT' (with a 'URL' field and a 'Link text' field).

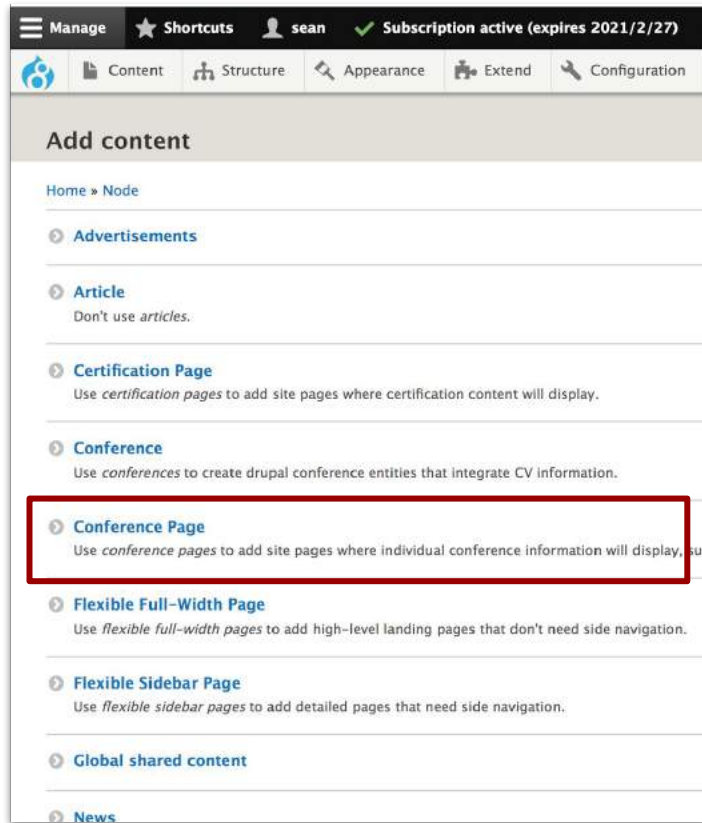
## Conference: Required Pages

---

Every Conference should have two pages:

- Home
- Registration

Create another “Conference Page” to add the Registration Page



## Conference: Add a Registration Page

Add a page title of “Registration,” and remove the “Conference Header.” In the “Condensed-Width Content” section, select a “Conference Registration” component.

### Important:

The “Registration” page should **always** be called “Registration” with a URL of “/registration” placed under the Conference homepage.

/conferences/regional/example-conference/**registration**

The screenshot shows the 'Create Conference Page' form in a content management system. The form is titled 'Create Conference Page' and includes the following sections:

- Page Name \***: A text input field for the page name.
- Conference Header**: A section with a blue arrow button labeled 'CONFERENCE ENTITY NAME'.
- Conference Header Height**: A dropdown menu set to 'Condensed'. Below it, a note says: 'Select a display height for the conference header. Choose "Condensed" for interior conference detail page and "Large" for landmark conferences, such as the compliance institute.'
- Optional Page Headline**: A text input field for an optional headline.
- Condensed-Width Content**: A section with the text 'No Paragraph added yet.' and a note: 'Add content that appears next to the sidebar navigation. When making conference detail pages, add content to this section.' Below this is an 'Add Billboard' button with a dropdown arrow, followed by the text 'to Condensed-Width Content'.
- Optional Sidebar Content**: A section with the text 'No Paragraph added yet.' and a note: 'Add brief content that appears below the sidebar navigation, such as a conference brochure.' Below this is an 'Add Icon Card Element' button.
- Optional Full-Width Content**: A section with the text 'No Paragraph added yet.'

A red box highlights the 'Page Name' field and the 'Condensed-Width Content' section, including the 'Add Billboard' button and the 'Add Icon Card Element' button.

## Conference: Registration Menu Link

---

Add this page to the menu underneath the Conference homepage we just created.

**Click “Save.”**

The screenshot shows a web application interface with a top navigation bar containing 'Reports' and 'Help'. The main content area displays a form with the following elements:

- A 'Remove' button.
- A text field labeled 'Last saved: Not saved yet'.
- A text field labeled 'Author: sean'.
- A text field labeled 'Revision log message'.
- A text area with the prompt 'Briefly describe the changes you have made.'
- A list of menu items: 'MENU SETTINGS', 'META TAGS', and 'URL ALIAS'. The 'MENU SETTINGS' item is highlighted with a red rectangular box.

Below the main content area, a dropdown menu is open, showing a hierarchy of parent items:

- Parent item: <Main navigation>
- Item: <Main navigation>
- Item: -- Conferences
- Item: ---- Regional
- Item: ----- 2019 Alaska Regional
- Item: -Choose-





# Certification Page

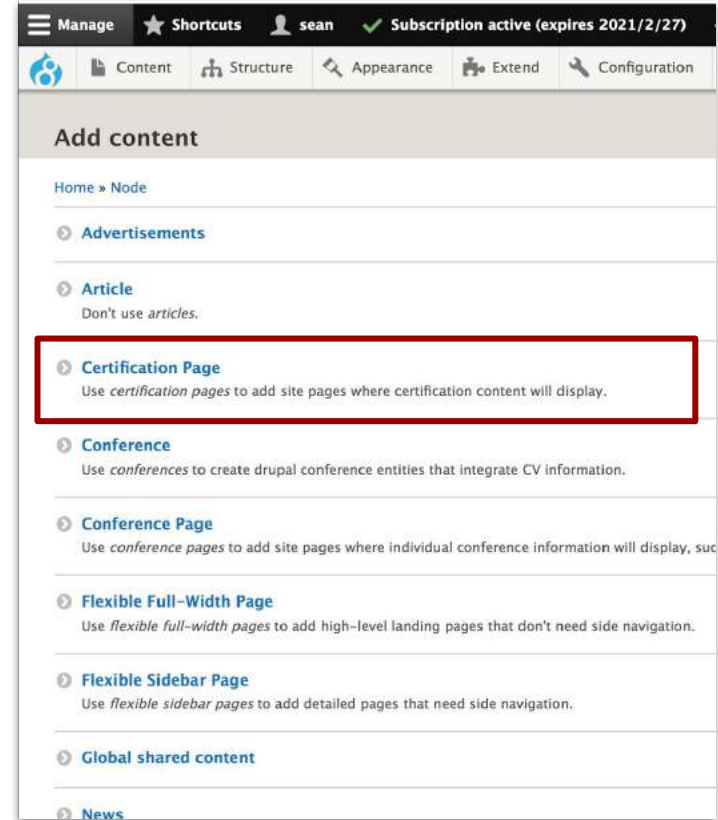
## Certification Pages: Getting Started

---

Use the “Certification Page” content type for any pages that need to be associated with the Compliance Certification Board.

[https://stage.corporatecompliance.org/node/add/certification\\_page](https://stage.corporatecompliance.org/node/add/certification_page)

[https://stage.hcca-info.org/node/add/certification\\_page](https://stage.hcca-info.org/node/add/certification_page)



## Certification Pages: Add Content

---

Use the “Condensed-Width Content” section to add new page components.

There is an “Optional Sidebar Content” to display Icon Cards below the sidebar navigation.

Manage Shortcuts sean Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create Certification Page

Home > Node > Add content

Add a page name that will be used in the page URL and web browser label.

Page Name <sup>+</sup>

Optional Page Headline

Add an optional headline to the certification page that will display below the certification banner.

**Condensed-Width Content**  
*No Paragraph added yet.*  
Add content that appears next to the sidebar navigation.  
Add Billboard to Condensed-Width Content

**OPTIONAL SIDEBAR CONTENT**

+ Icon Card Element

► ICON

**CARD LINK**

URL

Start typing to find content or paste a URL and click on the suggestion below.

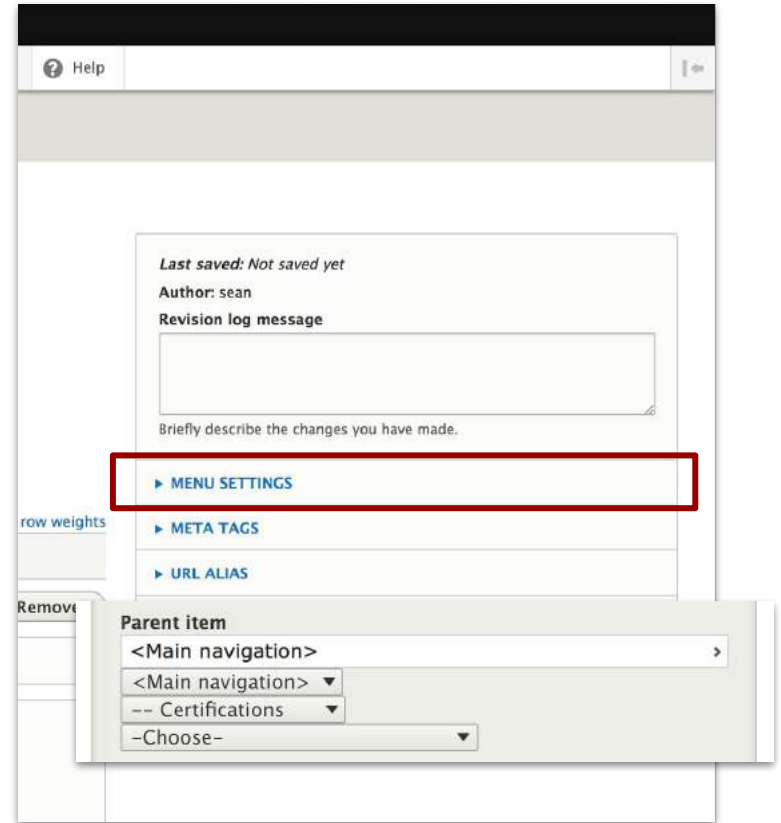
## Certification Pages: Create a Menu Link

---

To add a menu link, navigate to the sidebar on the right-hand of the screen.

Select “Menu Settings” and toggle the “Provide a menu link” checkbox. Select a “Parent Item” for the new Certification page.

**Click “Save.”**



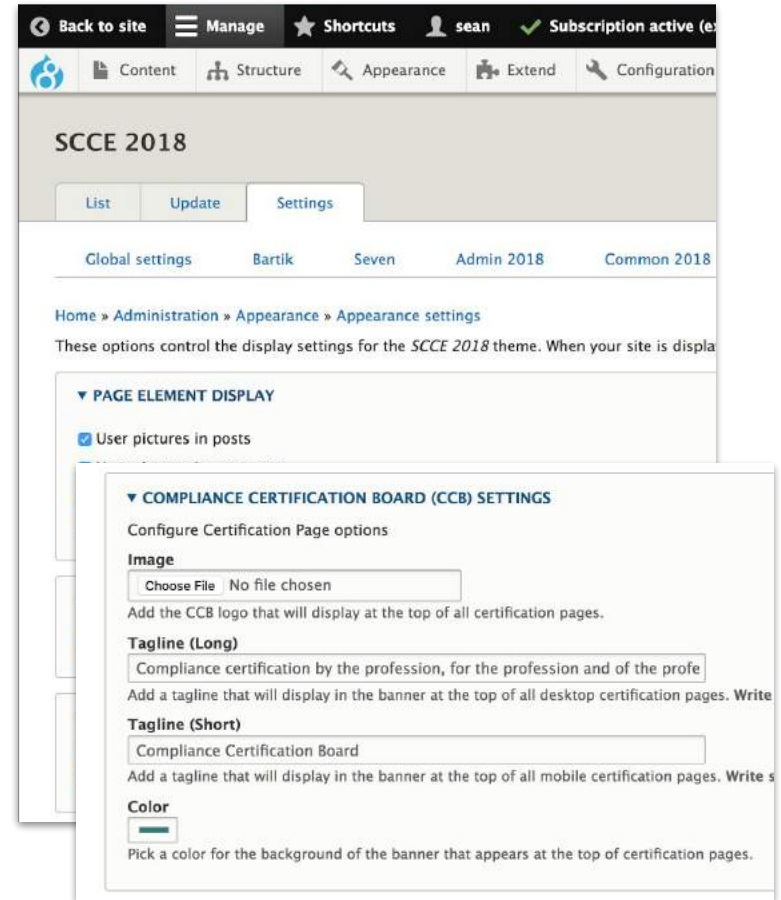
## Certification Pages: Modify Settings

Each Certification Page will display a Compliance Certification Board banner at the top of each page.

This can be found in the “Appearance Settings.” Select either the SCCE or the HCCA tab to edit the “Compliance Certification Board (CCB) Settings.”

<https://stage.corporatecompliance.org/admin/appearance/settings/>

<https://stage.hcca-info.org/admin/appearance/settings/>



The screenshot displays the Drupal administration interface for the 'SCCE 2018' theme. The top navigation bar includes 'Back to site', 'Manage', 'Shortcuts', and user information 'sean' with a 'Subscription active' status. Below the navigation, there are tabs for 'List', 'Update', and 'Settings'. The 'Settings' tab is active, showing 'Global settings' and a list of user roles: 'Bartik', 'Seven', 'Admin 2018', and 'Common 2018'. The breadcrumb trail is 'Home » Administration » Appearance » Appearance settings'. A message states: 'These options control the display settings for the SCCE 2018 theme. When your site is displayed...' Under the 'PAGE ELEMENT DISPLAY' section, the 'User pictures in posts' checkbox is checked. The 'COMPLIANCE CERTIFICATION BOARD (CCB) SETTINGS' section is expanded, showing the following options:

- Image:** A 'Choose File' button with the text 'No file chosen'. Below it, a description: 'Add the CCB logo that will display at the top of all certification pages.'
- Tagline (Long):** A text input field containing 'Compliance certification by the profession, for the profession and of the profe'. Below it, a description: 'Add a tagline that will display in the banner at the top of all desktop certification pages. Write s'.
- Tagline (Short):** A text input field containing 'Compliance Certification Board'. Below it, a description: 'Add a tagline that will display in the banner at the top of all mobile certification pages. Write s'.
- Color:** A color selection tool with a green swatch. Below it, a description: 'Pick a color for the background of the banner that appears at the top of certification pages.'



# **Flexible Full-Width Page & Flexible Sidebar Page**

## Flexible Pages: Getting Started

---

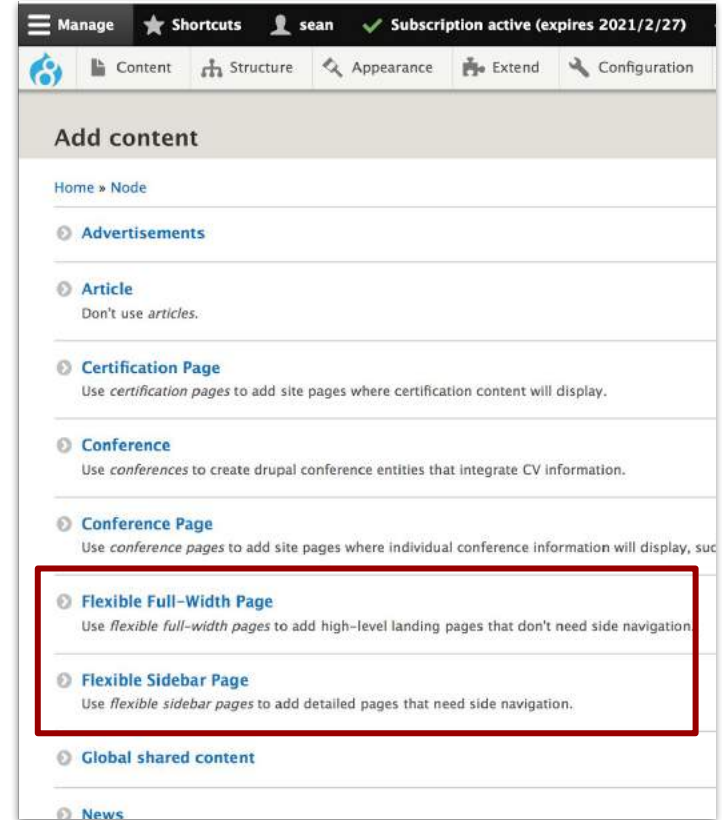
The majority of pages on the site will use either the “Flexible Full-Width Page” or the “Flexible Sidebar Page” content type.

[https://stage.corporatecompliance.org/node/add/flexible\\_full\\_width](https://stage.corporatecompliance.org/node/add/flexible_full_width)

[https://stage.corporatecompliance.org/node/add/flexible\\_with\\_sidebar](https://stage.corporatecompliance.org/node/add/flexible_with_sidebar)

[https://stage.hcca-info.org/node/add/flexible\\_full\\_width](https://stage.hcca-info.org/node/add/flexible_full_width)

[https://stage.hcca-info.org/node/add/flexible\\_with\\_sidebar](https://stage.hcca-info.org/node/add/flexible_with_sidebar)

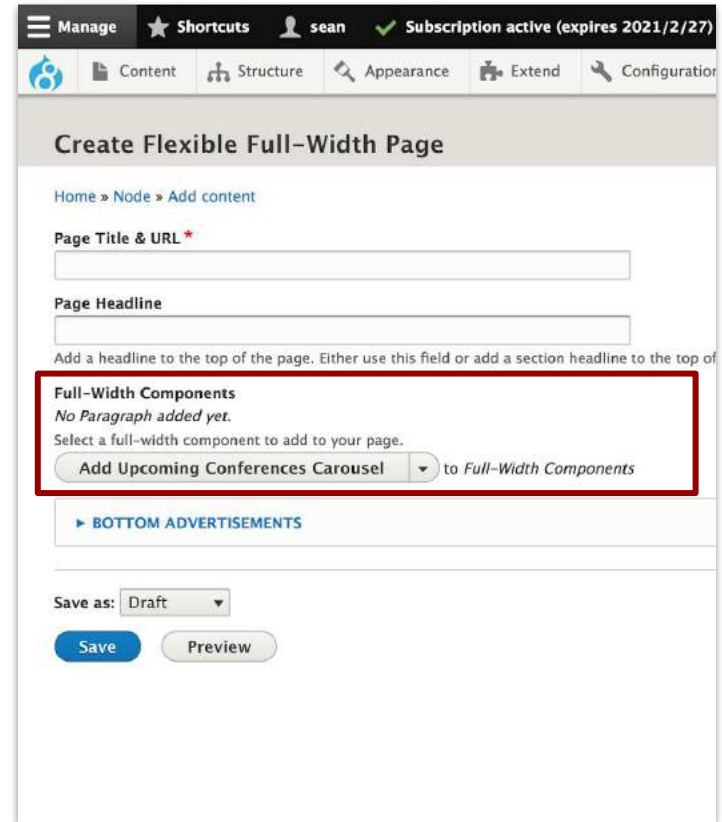


## Flexible Pages: Adding Content

---

Content for Full-Width pages will be managed in the “Full-Width Content” section.

Content for Sidebar pages will be managed in the “Condensed-Width Content” section.



The screenshot shows the Drupal administration interface for creating a flexible full-width page. The top navigation bar includes 'Manage', 'Shortcuts', a user profile for 'sean', and a subscription status 'Subscription active (expires 2021/2/27)'. The main navigation menu contains 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The page title is 'Create Flexible Full-Width Page'. The breadcrumb trail is 'Home » Node » Add content'. The form includes fields for 'Page Title & URL \*' and 'Page Headline'. Below these fields is a note: 'Add a headline to the top of the page. Either use this field or add a section headline to the top of'. The 'Full-Width Components' section is highlighted with a red box and contains the text 'No Paragraph added yet.' and 'Select a full-width component to add to your page.' A dropdown menu is open, showing 'Add Upcoming Conferences Carousel' selected, with a link to 'Full-Width Components'. Below this is a section for 'BOTTOM ADVERTISEMENTS'. At the bottom of the form, there is a 'Save as:' dropdown set to 'Draft', and 'Save' and 'Preview' buttons.





# Global Shared Content

## Global Shared Content



Global shared content allows content authors to create one piece of content that is reused across many pages of the site. Any change will update everywhere the content is used.

For example, callouts to become a member or policy statements can be managed in one place.

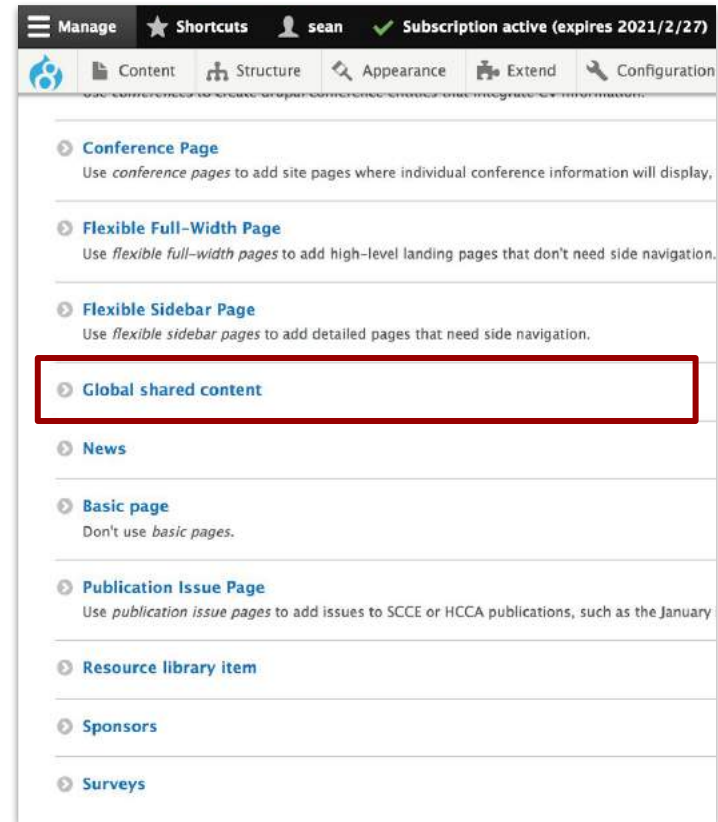
## Global Shared Content: Getting Started

---

Use the “Global Shared Content” content type for any content that need to be associated with multiple pages.

[https://stage.corporatecompliance.org/node/add/global\\_shared\\_content](https://stage.corporatecompliance.org/node/add/global_shared_content)

[https://stage.hcca-info.org/node/add/global\\_shared\\_content](https://stage.hcca-info.org/node/add/global_shared_content)



## Global Shared Content: Adding Detail

---

Fill out any details related to the Global Shared Content.

Click “Save.”

**Tip:** The “Billboard” and “Basic Columns” are commonly used components.

**Tip:** Make sure to add a descriptive title. This will help with searching.

The screenshot shows the Drupal interface for creating global shared content. The form is titled "Create Global shared content" and includes a breadcrumb "Home » Node » Add content". A red box highlights the "Title" field, the "Components" section (which includes an "Add Billboard" button and a dropdown menu), and the "Save as" dropdown (set to "Draft"). Below these are "Save" and "Preview" buttons. The top navigation bar shows "Manage", "Shortcuts", "sean", and "Subscription active (expires 2021/2/27)".

**Tip:** If the content is intended to be placed in a full-width area or next to a sidebar, consider including that in the name.

## Global Shared Content: Add to a Page

---

Now, when you are creating or editing page, you can add the “Global Shared Content” component and search for the title of the content.

**Click “Save.”**

The screenshot shows the 'Create Flexible Full-Width Page' interface. At the top, there is a navigation bar with 'Manage', 'Shortcuts', 'sean', and 'Subscription active (expires 2021/2/27)'. Below this is a secondary navigation bar with 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main heading is 'Create Flexible Full-Width Page'. The breadcrumb trail is 'Home » Node » Add content'. There are two input fields: 'Page Title & URL \*' and 'Page Headline'. Below these is a note: 'Add a headline to the top of the page. Either use this field or add a section headline to the top of'. The 'FULL-WIDTH COMPONENTS' section is highlighted with a red box. It contains a '+ Global Shared Content' component. Inside this component, there is a '▼ CONTENT ITEM' section with a 'Select content' button. Below this, there is a note: 'Select a full-width component to add to your page.' and a dropdown menu with 'Add Upcoming Conferences Carousel' and 'to Full-Width Components'. At the bottom, there is a '▶ BOTTOM ADVERTISEMENTS' section and a 'Save as: Draft' dropdown.



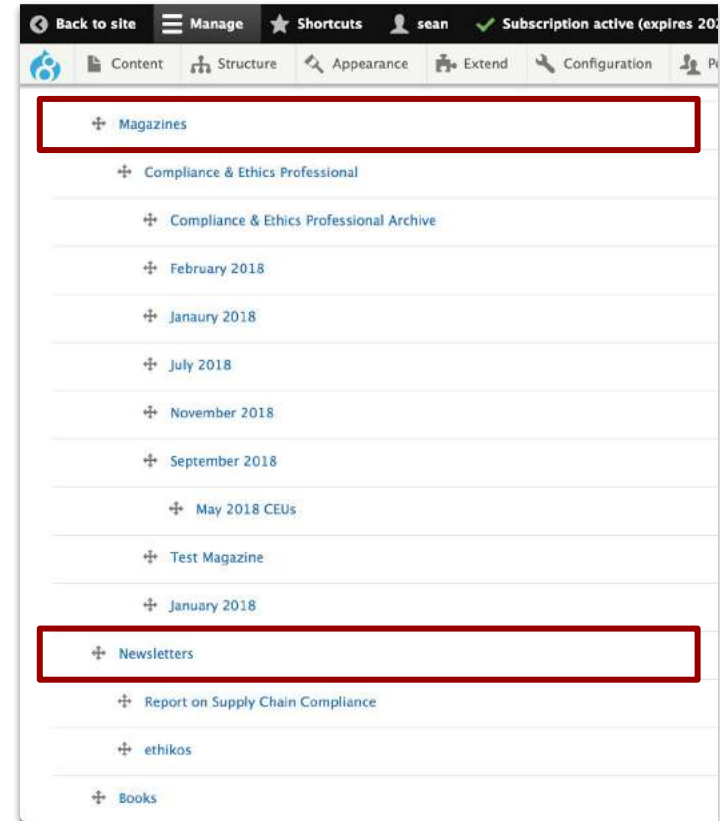
# **Publication Issue Page (Magazines and Newsletters)**

## Publications: In the Menu

---

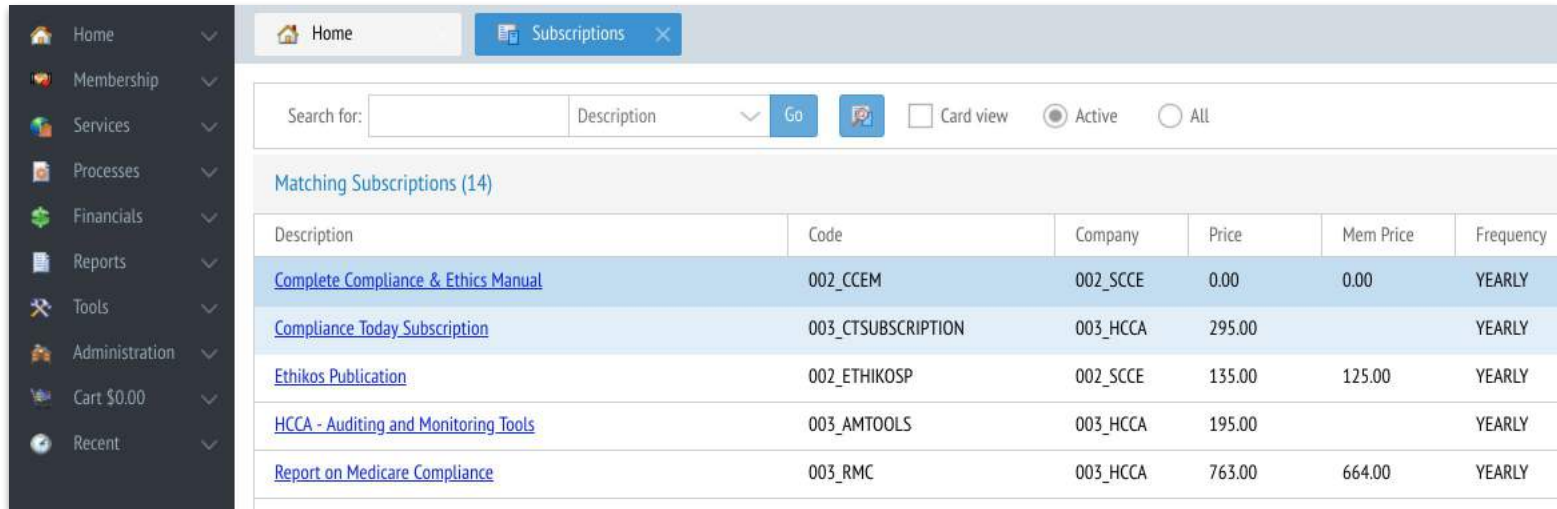
Magazines and Newsletters use the same underlying principles for content management as the other content types.

However, the content for each of these pieces are located in different places in the main menu.



## Publications: As on ClearVantage

Newsletters and Magazines in Drupal are connected to Subscriptions in CV through “Resource Type” taxonomy terms.



The screenshot displays a Drupal interface for managing subscriptions. On the left is a dark sidebar with navigation links: Home, Membership, Services, Processes, Financials, Reports, Tools, Administration, Cart \$0.00, and Recent. The main content area has a breadcrumb trail: Home > Subscriptions. Below the breadcrumb is a search bar with the text "Search for:" and a dropdown menu set to "Description". To the right of the search bar are buttons for "Go", a magnifying glass icon, and view options: "Card view" (unchecked), "Active" (checked), and "All" (unchecked). Below the search bar, the text "Matching Subscriptions (14)" is displayed. A table lists the following subscriptions:

Description	Code	Company	Price	Mem Price	Frequency
<a href="#">Complete Compliance &amp; Ethics Manual</a>	002_CCEM	002_SCCE	0.00	0.00	YEARLY
<a href="#">Compliance Today Subscription</a>	003_CTSUBSCRIPTION	003_HCCA	295.00		YEARLY
<a href="#">Ethikos Publication</a>	002_ETHIKOSP	002_SCCE	135.00	125.00	YEARLY
<a href="#">HCCA - Auditing and Monitoring Tools</a>	003_AMTOOLS	003_HCCA	195.00		YEARLY
<a href="#">Report on Medicare Compliance</a>	003_RMC	003_HCCA	763.00	664.00	YEARLY



## Publications: Taxonomies

---

We can organize different types of Publications by applying a “Resource type” taxonomy.

For example, we have a “Compliance & Ethics Professional” label for publications that fall under this taxonomy.

The screenshot displays the Drupal administration interface for editing a taxonomy. The top navigation bar includes 'Back to site', 'Manage', 'Shortcuts', and user information 'sean' with 'Subscription active'. Below the navigation are tabs for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main heading is 'Resource type'. A secondary navigation bar contains 'List', 'Edit', 'Manage fields', 'Manage form display', and 'Manage display'. The breadcrumb trail is 'Home » Administration » Structure » Taxonomy » Edit Resource type'. A message states: 'You can reorganize the terms in Resource type using their drag-and-drop handles, and group them into hierarchies.' Below this is a '+ Add term' button. The main content area shows a list of terms under the heading 'NAME':

- Compliance & Ethics Professional
- Conference Handouts
- Conference Presentations
- Empirical Studies
- Expert Videos
- International Resources
- New Premium Newsletter
- Ethikos

## Publications: Taxonomies

---

For the “Resource Type” Taxonomy that corresponds to Magazine and Newsletters, you can check to make sure that the CV Subscription Code is matches correctly by selecting the “Edit” button.

Using “Requires Membership” or “Requires Payment” will affect the Call to Action on detail pages.

The screenshot shows the Drupal administration interface for editing a 'Resource type'. The breadcrumb trail is 'Home » Administration » Structure » Taxonomy » Edit Resource type'. The page title is 'Resource type'. There are tabs for 'List', 'Edit', 'Manage fields', 'Manage form display', and 'Manage display'. Below the tabs, there is a '+ Add term' button. The main content area shows a list of terms under the heading 'NAME'. The term 'Compliance & Ethics Professional' is highlighted with a red box. Below this term, there are several other terms: 'Conference Handouts', 'Conference Presentations', and 'Empirical Studies'. A modal dialog box is open over the 'Compliance & Ethics Professional' term, showing the 'CV Subscription Code' field with the value '002\_CCEM'. The modal also contains the text 'Provide the subscription code required to view this resource.' and a 'New' button. The user's name 'sean' and 'Subscription active' status are visible in the top right corner of the interface.



# Publication Issue Page (Magazines)

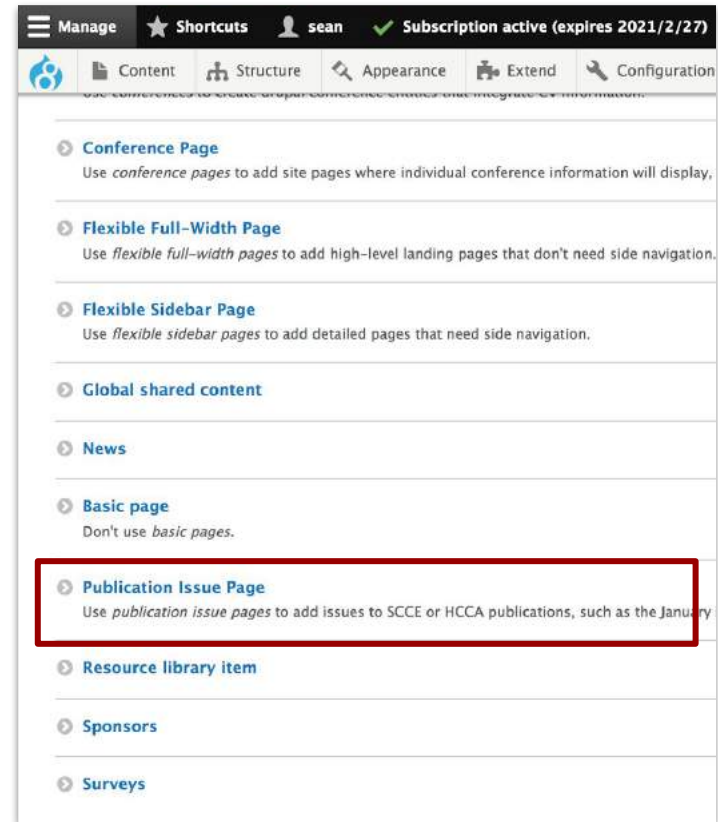
## Publication Issue Page: Add a Magazine

---

Use the “Publication Issue Page” content type for any pages that need to be associated with publications.

<https://stage.corporatecompliance.org/node/add/publication>

<https://stage.hcca-info.org/node/add/publication>



The screenshot shows the Drupal content type selection interface. At the top, there is a navigation bar with 'Manage', 'Shortcuts', a user profile for 'sean', and a 'Subscription active (expires 2021/2/27)' status. Below this is a secondary navigation bar with icons and labels for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main area displays a list of content types, each with a right-pointing arrow icon and a brief description. The 'Publication Issue Page' content type is highlighted with a red rectangular box. The list includes: Conference Page, Flexible Full-Width Page, Flexible Sidebar Page, Global shared content, News, Basic page, Publication Issue Page, Resource library item, Sponsors, and Surveys.

- ▶ **Conference Page**  
Use *conference pages* to add site pages where individual conference information will display.
- ▶ **Flexible Full-Width Page**  
Use *flexible full-width pages* to add high-level landing pages that don't need side navigation.
- ▶ **Flexible Sidebar Page**  
Use *flexible sidebar pages* to add detailed pages that need side navigation.
- ▶ **Global shared content**
- ▶ **News**
- ▶ **Basic page**  
Don't use *basic pages*.
- ▶ **Publication Issue Page**  
Use *publication issue pages* to add issues to SCCE or HCCA publications, such as the January
- ▶ **Resource library item**
- ▶ **Sponsors**
- ▶ **Surveys**

## Publication Issue Page: Content

---

Fill out any details related to the Publication.

The “Publication Type” field will autocomplete taxonomies as you start typing.

Click “Save.”

The screenshot shows a web application interface for creating a publication issue page. The top navigation bar includes 'Manage', 'Shortcuts', a user profile for 'sean', and a subscription status 'Subscription active (expires 2021/2/27)'. Below the navigation is a toolbar with icons for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main heading is 'Create Publication Issue Page'. A breadcrumb trail reads 'Home > Node > Add content'. A sub-heading instructs the user: 'Add an issue name that will be used in the page URL and web browser label.' The form contains several fields: 'Issue Name' (highlighted with a red box), 'ISSUE DATE' (with sub-fields for '01/27/2019' and '10:04:27 PM'), and 'PUBLICATION TYPE' (with a dropdown menu). A tooltip for the 'PUBLICATION TYPE' dropdown is visible, showing the text 'com' and a suggestion 'Compliance & Ethics Professional'. Below the form, there is a button labeled 'Add another item'.

## Publication Issue Page: Resources

---

The table of contents is built using the “Resource Elements” field.

There are three types of content that can be added:

- Resource Item - Content
- Resource Item - Link
- Resource Item - File

A common piece of content is adding a PDF using the “File Option.”

Manage Shortcuts sean Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create Publication Issue Page

Home > Node > Add content

Add an issue name that will be used in the page URL and web browser label.

Issue Name \*

ISSUE DATE

01/27/2019 10:04:27 PM

PUBLICATION TYPE

Type and select the name of the publication, such as Compliance and Ethics Professional Magazine

Add another item

Resource Elements  
No Paragraph added yet.

Add Resource Item - Content to Resource Elements

Page Intro Text (Edit summary)

B I S [email icon] [document icon] [link icon] [image icon] [video icon] Format Styles [undo icon]

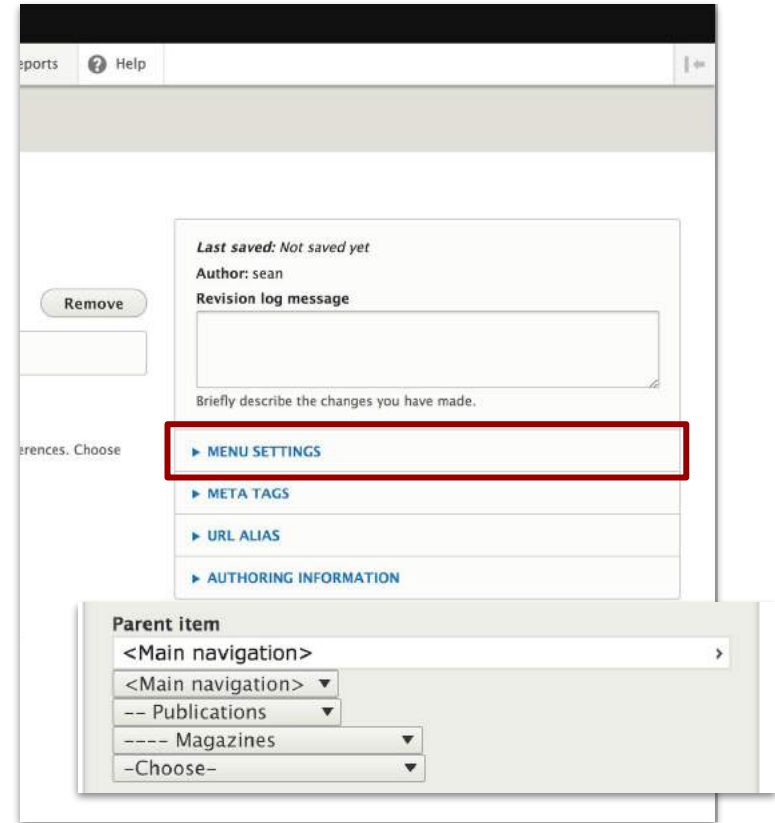
## Publication Issue Page: Menu Link

---

To add a menu link, navigate to the sidebar on the right-hand of the screen.

Select “Menu Settings” and toggle the “Provide a menu link” checkbox. Under “Parent Item” use the dropdowns to find the correct type of publication and select that.

Click “Save.”





# Publication Issue Page (Newsletter)



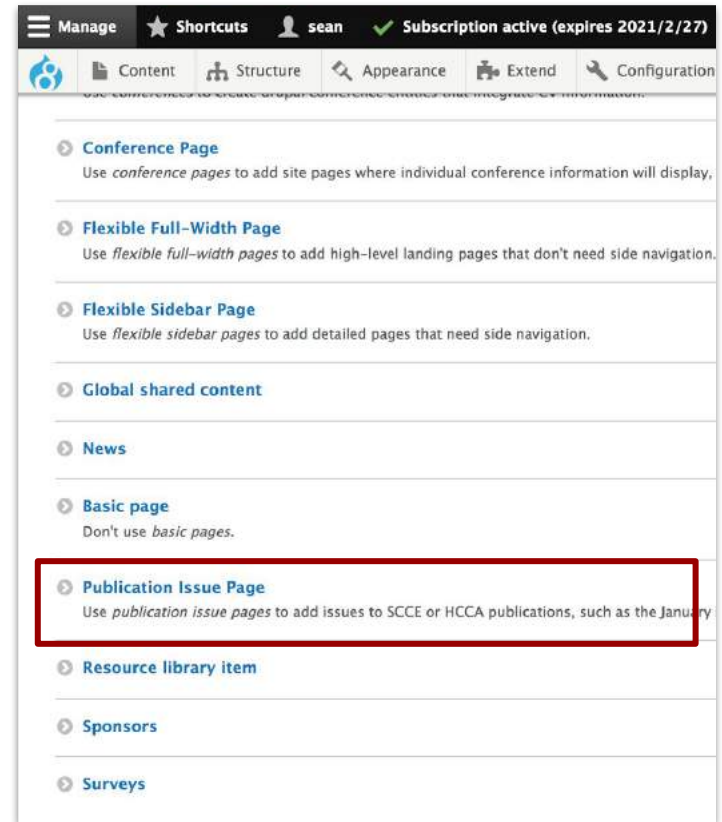
## Publication Issue Page: Add a Newsletter

---

Use the “Publication Issue Page” content type for any pages that need to be associated with publications.

<https://stage.corporatecompliance.org/node/add/publication>

<https://stage.hcca-info.org/node/add/publication>



The screenshot shows the Drupal content type selection interface. At the top, there is a navigation bar with 'Manage', 'Shortcuts', a user profile for 'sean', and a 'Subscription active (expires 2021/2/27)' status. Below this is a secondary navigation bar with icons and labels for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main area displays a list of content types, each with a chevron icon and a brief description:

- Conference Page: Use *conference pages* to add site pages where individual conference information will display.
- Flexible Full-Width Page: Use *flexible full-width pages* to add high-level landing pages that don't need side navigation.
- Flexible Sidebar Page: Use *flexible sidebar pages* to add detailed pages that need side navigation.
- Global shared content
- News
- Basic page: Don't use *basic pages*.
- Publication Issue Page**: Use *publication issue pages* to add issues to SCCE or HCCA publications, such as the January
- Resource library item
- Sponsors
- Surveys

The 'Publication Issue Page' option is highlighted with a red rectangular box.

## Publication Issue Page: Content

---

Fill out any details related to the Publication.

The “Publication Type” field will autocomplete taxonomies as you start typing.

Click “Save.”

The screenshot shows the 'Create Publication Issue Page' form in a web application. The form is titled 'Create Publication Issue Page' and has a breadcrumb trail 'Home > Node > Add content'. Below the title, there is a note: 'Add an issue name that will be used in the page URL and web browser label.' The form contains several fields: 'Issue Name' (a text input field with a red box around it), 'ISSUE DATE' (a date and time picker with '01/27/2019' and '10:04:27 PM' selected), and 'PUBLICATION TYPE' (a dropdown menu with a red box around it). A dropdown menu is open for 'PUBLICATION TYPE', showing suggestions: 'news' and 'New Premium Newsletter'. Below the dropdown, there is a note: 'Type and select the name of the publication, such as Compliance and Ethics Professional Magazine'. There is also an 'Add another item' button. The top of the page shows a navigation bar with 'Manage', 'Shortcuts', 'sean', and 'Subscription active (expires 2021/2/27)'. Below the navigation bar, there are tabs for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'.

## Publication Issue Page: Resources

---

The table of contents is built using the “Resource Elements” field.

There are three types of content that can be added:

- Resource Item – Content
- Resource Item – Link
- Resource Item – File

A common piece of content is adding a PDF using the “File Option.”

Manage Shortcuts sean Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create Publication Issue Page

Home > Node > Add content

Add an issue name that will be used in the page URL and web browser label.

Issue Name \*

ISSUE DATE

01/27/2019 10:04:27 PM

PUBLICATION TYPE

Type and select the name of the publication, such as Compliance and Ethics Professional Magazine

Add another item

Resource Elements  
No Paragraph added yet.

Add Resource Item - Content to Resource Elements

Page Intro Text (Edit summary)

B I S [Icons] Format Styles [Icons]

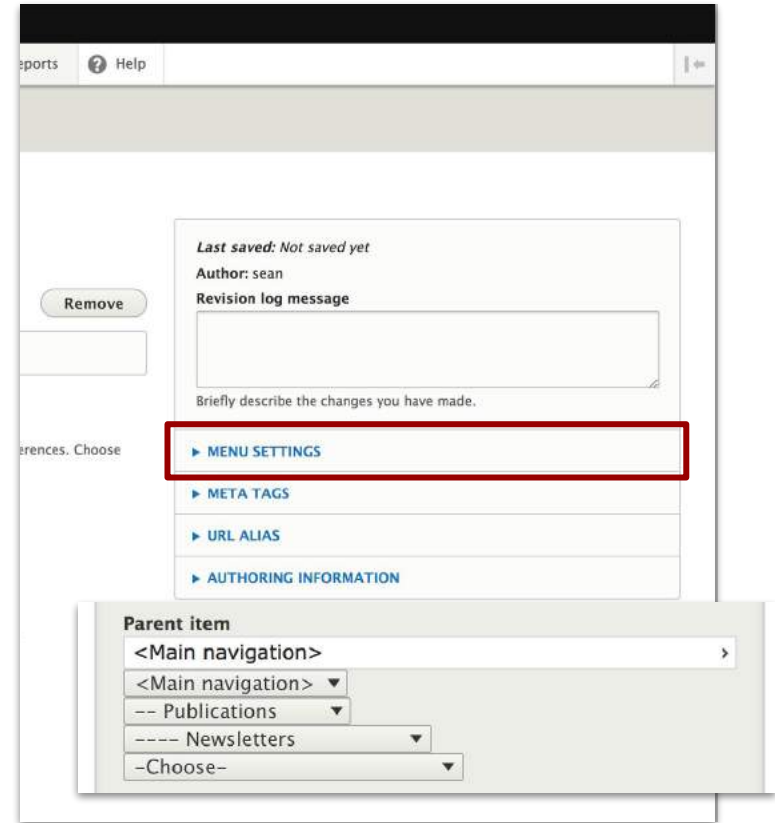
## Publication Issue Page: Menu Link

---

To add a menu link, navigate to the sidebar on the right-hand of the screen.

Select “Menu Settings” and toggle the “Provide a menu link” checkbox. Under “Parent Item” use the dropdowns to find the correct type of publication and select that.

Click “Save.”





# Resource Library Item

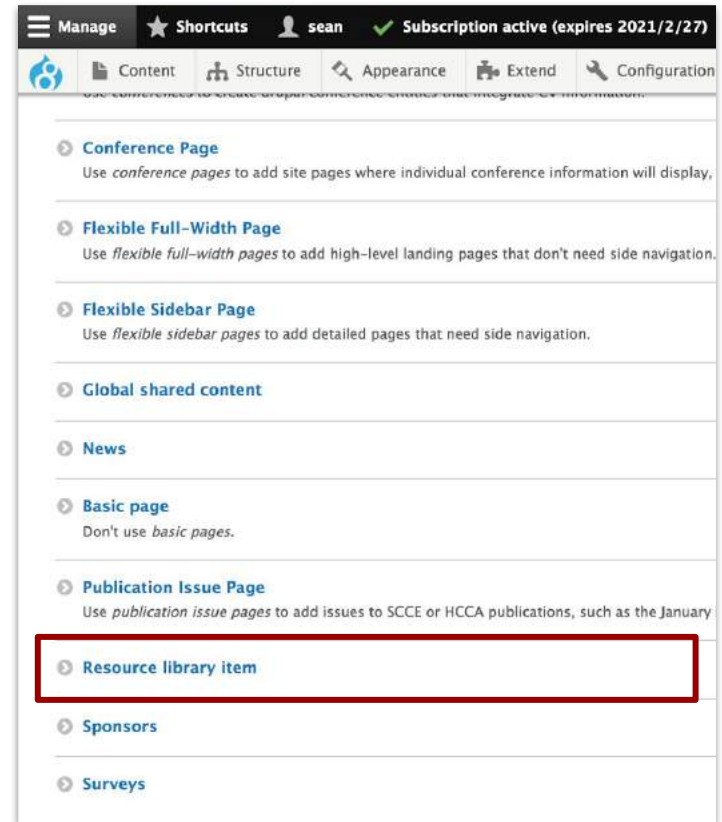
## Resource Library Item: Getting Started

---

Use the “Resource library item” content type for any pages that need to be associated with resources.

[https://stage.corporatecompliance.org/node/add/resource\\_library\\_item](https://stage.corporatecompliance.org/node/add/resource_library_item)

[https://stage.hcca-info.org/node/add/resource\\_library\\_item](https://stage.hcca-info.org/node/add/resource_library_item)



## Resource Library Item: Adding Content

---

Fill out any details related to the Resource Library Item.

The “Type” field will autocomplete taxonomies as you start typing.

Click “Save.”

The screenshot shows the 'Create Resource library item' form in a web application. The form is titled 'Create Resource library item' and has a breadcrumb trail 'Home » Node » Add content'. The form includes the following fields:

- Title \***: A text input field with a small icon on the right.
- PUBLICATION DATE**: Two date and time input fields, one showing '01/27/2019' and the other showing '10:23:19 PM'.
- TYPE**: A dropdown menu with a search icon on the right. Below the dropdown, an autocomplete list is visible with the following items:
  - Stud
  - Empirical Studies

Below the 'TYPE' field, there is a button labeled 'Add another item'. The form also has a 'CONTENT' section with a button labeled 'Add another item' and an 'Excerpt' field.

## Resource Library Item: Content

---

Content is added using the “Content” field.

There are three types of content that can be added:

- Resource Item - Content
- Resource Item - Link
- Resource Item - File

A common piece of content is adding a PDF using the “File Option.”

The screenshot shows the 'Create Resource library item' form. The top navigation bar includes 'Manage', 'Shortcuts', 'sean', and 'Subscription active (expires 2021/2/27)'. The main navigation bar has 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The form title is 'Create Resource library item'. Below the title is a breadcrumb 'Home » Node » Add content'. The form has a 'Title \*' field, a 'PUBLICATION DATE' section with '01/27/2019' and '10:23:19 PM' fields, and a 'TYPE' section with a dropdown menu. A red box highlights the 'CONTENT' section, which contains a dropdown menu with 'Add Resource Item - Content' selected, followed by 'to Content'. Below the 'CONTENT' section is an 'Excerpt' field.



## Resource Library Item: Details

---

The “Excerpt” field should be a short description of the resource; this description will display on the Resource Library search page.

The “Body” field should be the long, detailed text of the resource.

Manage ★ Shortcuts sean ✓ Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

Excerpt

Body (Edit summary)

B I S Format - Styles -

Text format Basic HTML

TOPIC

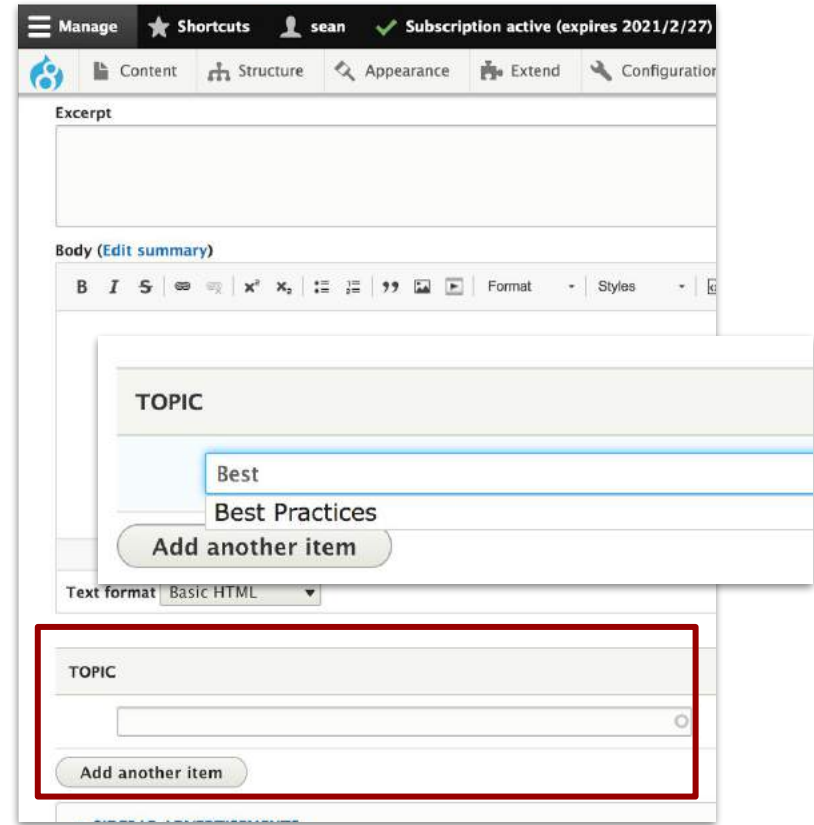
Add another item

## Resource Library Item: Topic

---

Add “Topics” to describe the resource. The “Topic” field will autocomplete taxonomies as you start typing. You can add multiple topics.

Click “Save.”





# News

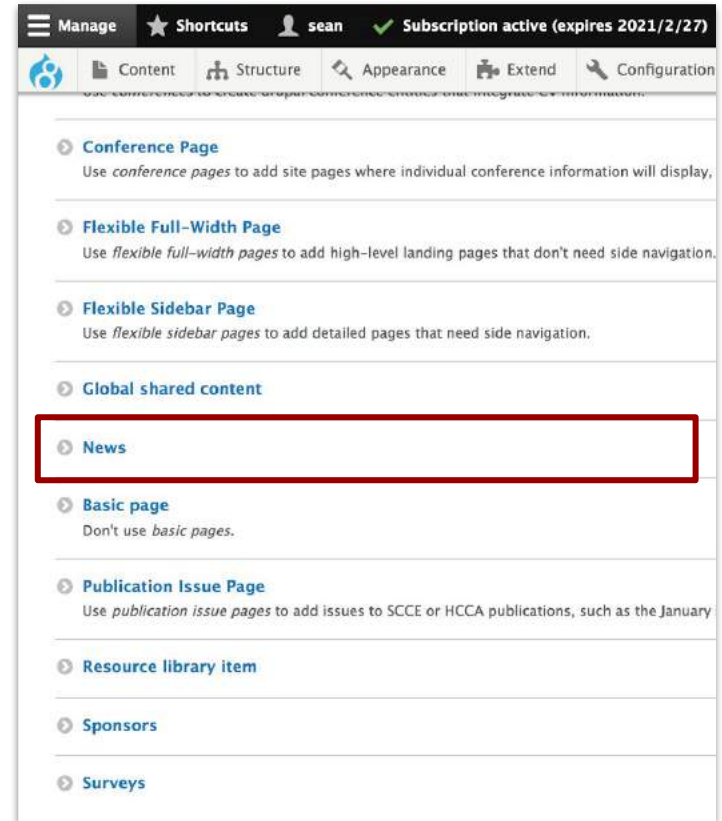
## News: Getting Started

---

Use the “News” content type for any pages that need to be associated with news.

<https://stage.corporatecompliance.org/node/add/news>

<https://stage.hcca-info.org/node/add/news>

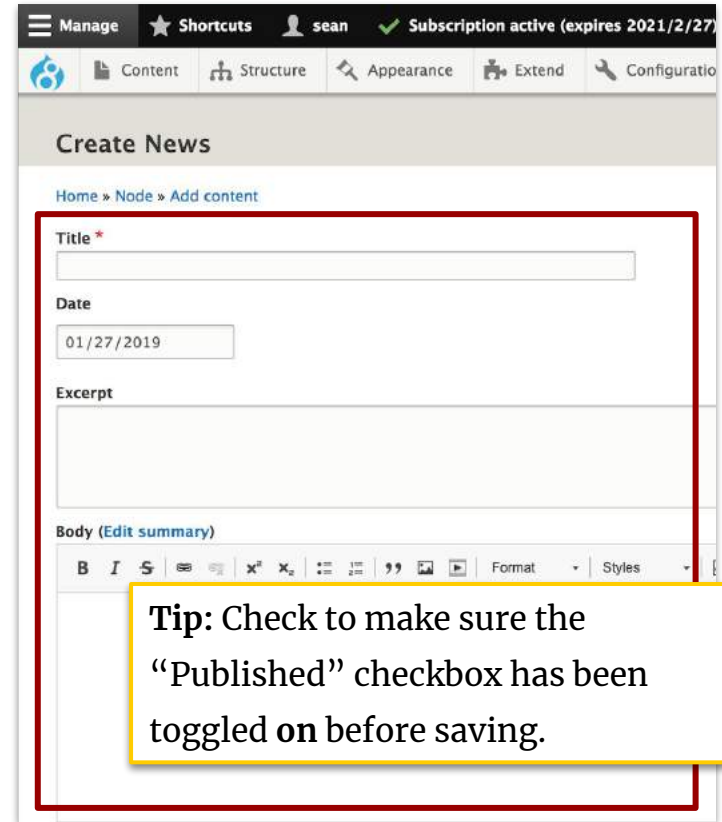


## News: Adding Content

---

Fill out any details related to the News item.

Click “Save.”



Manage Shortcuts sean Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create News

Home » Node » Add content

**Title \***

**Date**

**Excerpt**

**Body (Edit summary)**

B I S [Icons] Format Styles

**Tip:** Check to make sure the “Published” checkbox has been toggled on before saving.

## News: Details

---

The “Excerpt” field should be a short description of the News item; this description will display on the Resource Library search page.

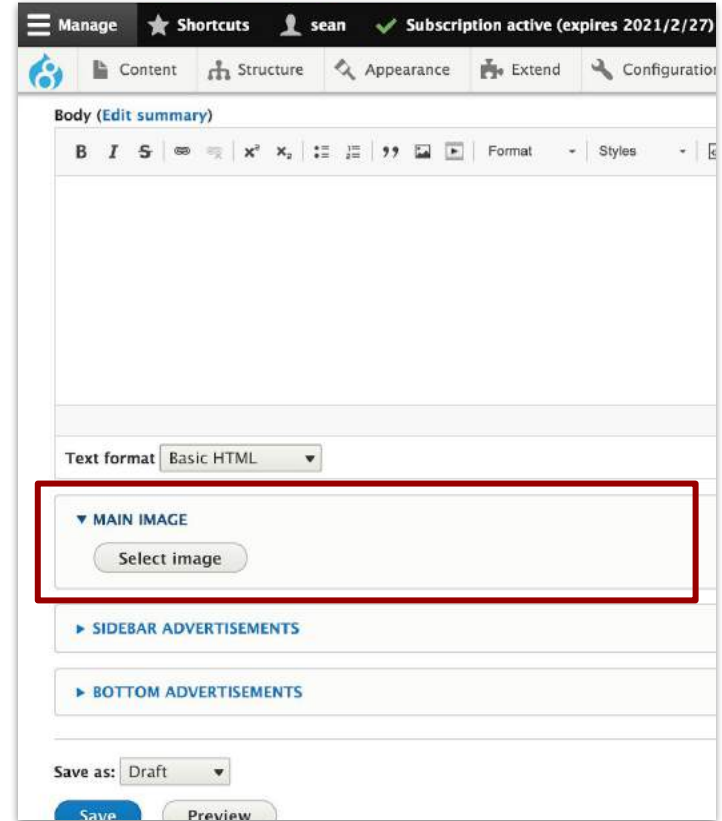
The “Body” field should be the long, detailed text of the News item.

The screenshot shows the 'Create News' form in a content management system. The top navigation bar includes 'Manage', 'Shortcuts', a user profile for 'sean', and a 'Subscription active (expires 2021/2/27)' indicator. Below the navigation bar are tabs for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main heading is 'Create News'. The breadcrumb trail is 'Home » Node » Add content'. The form fields are: 'Title \*' (required), 'Date' (set to 01/27/2019), 'Excerpt' (highlighted with a red border), and 'Body (Edit summary)' (with a rich text editor toolbar). The 'Excerpt' field is a text input area, and the 'Body' field is a rich text editor with a toolbar containing icons for bold, italic, strikethrough, link, unlink, list, ordered list, quote, image, and video, along with 'Format' and 'Styles' dropdown menus.

## News: Image

---

The “Main Image” field will be displayed in the News Listing page (as a preview), as well as the individual News Post page.





# Surveys



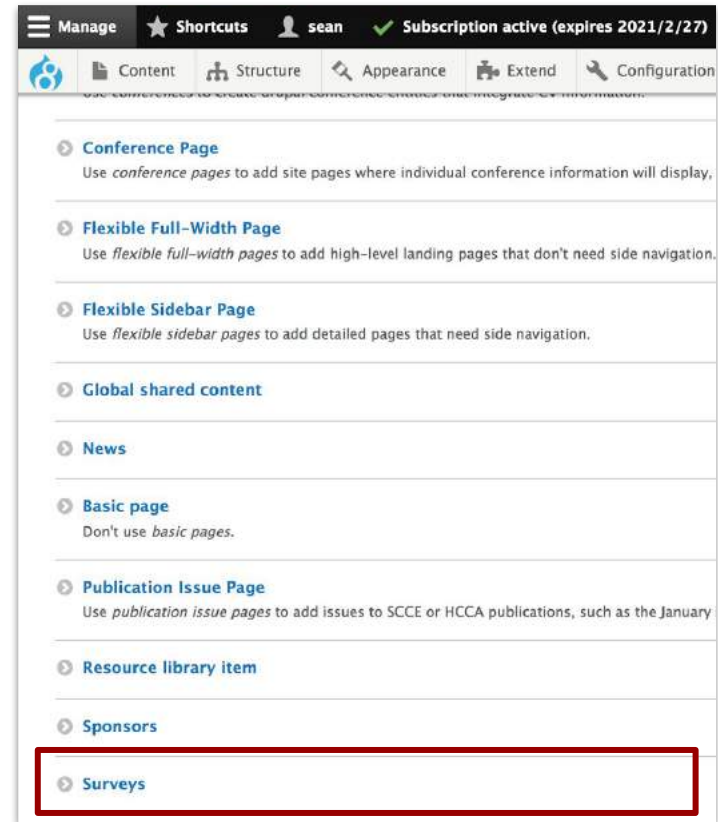
## Surveys: Getting Started

---

Use the “Surveys” content type for any pages that need to be associated with surveys.

<https://stage.corporatecompliance.org/node/add/surveys>

<https://stage.hcca-info.org/node/add/surveys>



## Surveys: Adding Content

---

Fill out any details related to the Survey.

**Click “Save.”**

Manage ★ Shortcuts sean ✓ Subscription active (expires 2021/2/27)

Content Structure Appearance Extend Configuration

### Create Surveys

Home > Node > Add content

**Title \***

Excerpt

Body (Edit summary)

**B I S** | | Format | Styles

Text format Basic HTML

**Tip:** Check to make sure the “Published” checkbox has been toggled on before saving.

## Surveys: Details

---

The “Excerpt” field should be a short description of the Survey; this description will display on the Resource Library search page.

The “Body” field should be the long, detailed text of the Survey.

The screenshot shows the 'Create Surveys' form in a web application. The form is titled 'Create Surveys' and is located under the breadcrumb 'Home > Node > Add content'. The form has a 'Title \*' field, an 'Excerpt' field, and a 'Body (Edit summary)' field. The 'Excerpt' field is highlighted with a red border. The 'Body' field has a rich text editor toolbar with options for Bold (B), Italic (I), Strikethrough (ABC), Bulleted list, Numbered list, Link, Unlink, and Text format (Basic HTML). The 'Text format' dropdown is set to 'Basic HTML'.

## Surveys: Image

---

The “Main Image” field will be displayed in the Survey Listing page (as a preview), as well as the individual Survey Post page.

The screenshot shows a web-based configuration interface for surveys. At the top, there is a navigation bar with a hamburger menu, 'Manage', 'Shortcuts', a user profile 'sean', and a status indicator 'Subscription active (expires 2021/2/27)'. Below this is a secondary navigation bar with icons and labels for 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The main content area is mostly empty, with a 'Text format' dropdown set to 'Basic HTML'. A red rectangular box highlights the 'MAIN IMAGE' section, which contains a 'Select image' button. Below this are sections for 'SIDEBAR ADVERTISEMENTS' and 'BOTTOM ADVERTISEMENTS', each with a right-pointing arrow. Further down, there is a 'Date' field with a placeholder 'mm/dd/yyyy' and a 'Save as:' dropdown set to 'Draft'. At the bottom, there are 'Save' and 'Preview' buttons.



# Menus

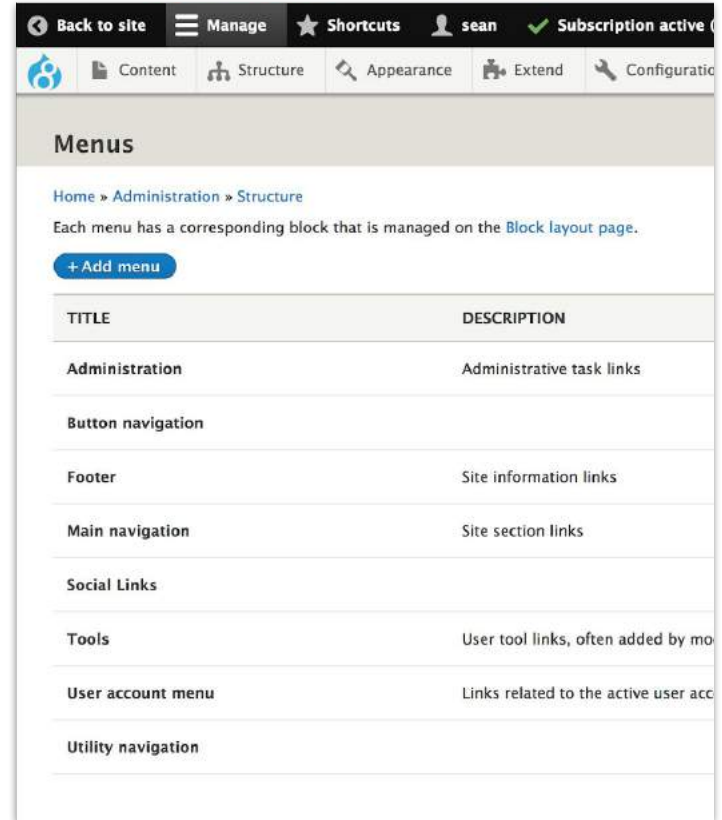
# Menus

---

Both SCCE and HCCA will come with a variety of “Menus” that will display across the site.

<https://stage.corporatecompliance.org/admin/structure/menu>

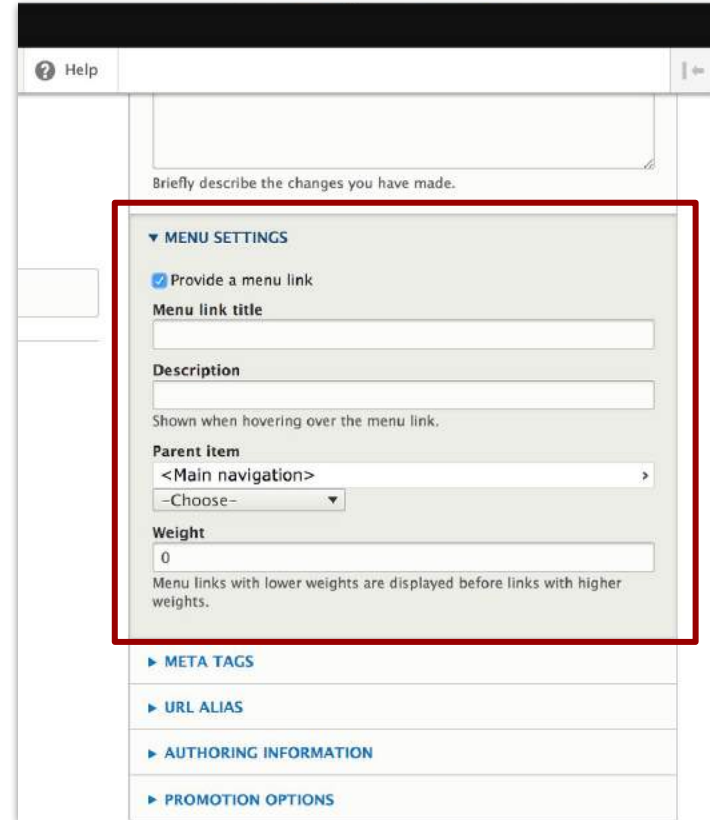
<https://stage.hcca-info.org/admin/structure/menu>



## Menus: Pages

---

When editing pages, you can control the title and where the page appears in the main menu using the “Menu Settings” section.



The screenshot shows a web editor interface with a 'Menu Settings' section highlighted by a red border. The section is titled 'MENU SETTINGS' and contains the following fields and options:

- Provide a menu link
- Menu link title:
- Description:   
Shown when hovering over the menu link.
- Parent item:
- Weight:   
Menu links with lower weights are displayed before links with higher weights.

Below the 'Menu Settings' section are four expandable sections: META TAGS, URL ALIAS, AUTHORING INFORMATION, and PROMOTION OPTIONS.

## Menus: Admin

---

The main menu is hierarchical and supports 2 levels. You can add, edit, delete, and move items around in the management screen.

<https://stage.corporatecompliance.org/admin/structure/menu/manage/main>

<https://stage.hcca-info.org/admin/structure/menu/manage/main>

The screenshot shows the Drupal administration interface for editing the 'Main navigation' menu. The top navigation bar includes 'Back to site', 'Manage', 'Shortcuts', 'sean', and 'Subscription active'. The main navigation menu includes 'Content', 'Structure', 'Appearance', 'Extend', and 'Configuration'. The page title is 'Edit menu Main navigation'. There are two tabs: 'Edit menu' (selected) and 'Devel'. The breadcrumb trail is 'Home » Administration » Structure » Menus'. A '+ Add link' button is visible. The 'Title' field is 'Main navigation' with a 'Machine name' field next to it. The 'Administrative summary' field is 'Site section links'. The 'Menu language' dropdown is set to 'English'. A red box highlights the 'MENU LINK' section, which contains four items: 'About SCCE', 'About SCCE', 'SCCE Staff', and 'Board Members', each with a plus icon for editing.





# URL Recommendations

## URLs - Recurring Conferences

---

General Conference URL:

[www.corporatecompliance.org/conferences/regional/southern-california-regional-compliance-and-ethics-conference](http://www.corporatecompliance.org/conferences/regional/southern-california-regional-compliance-and-ethics-conference)

- Need a general URL for each recurring conference, independent of year
- The URL should include the conference location when there are multiple happening in one year (regionals, academies)
- When bookmarked, a user should always be taken to the newest, upcoming version of that conference

## URLs - Recurring Conferences

---

### Year-specific Conference URL

[www.corporatecompliance.org/conferences/regional/southern-california-regional-compliance-and-ethics-conference-2018](http://www.corporatecompliance.org/conferences/regional/southern-california-regional-compliance-and-ethics-conference-2018)

- Need a unique URL for each conference year so the previous year's conference can be archived/accessed

## URLs - Recurring Conferences

---

### Shortened URL

[www.SCCE.org/southern-california-regional-conference](http://www.SCCE.org/southern-california-regional-conference)

- Printed brochure materials should include a link that can never be old/expired, but also short.
- Having “compliance and ethics” in the URL is redundant in this case and is recommended to be removed