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

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

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

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
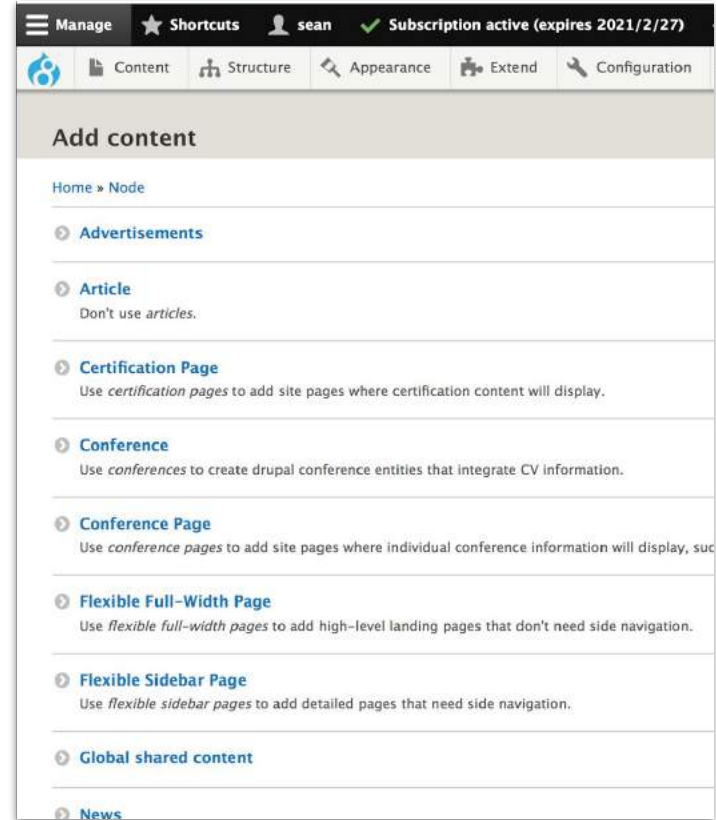
Conference & Conference Page

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
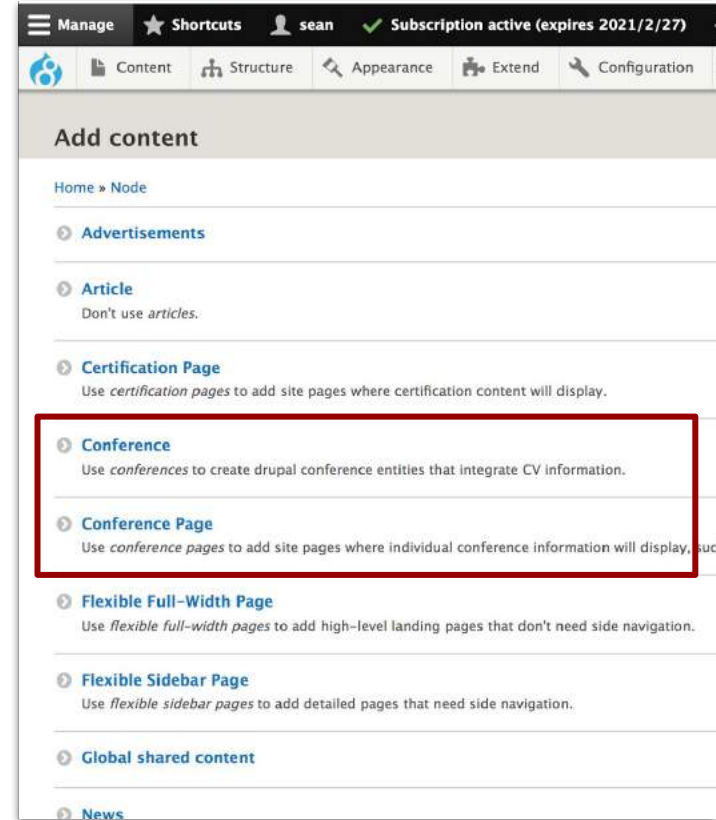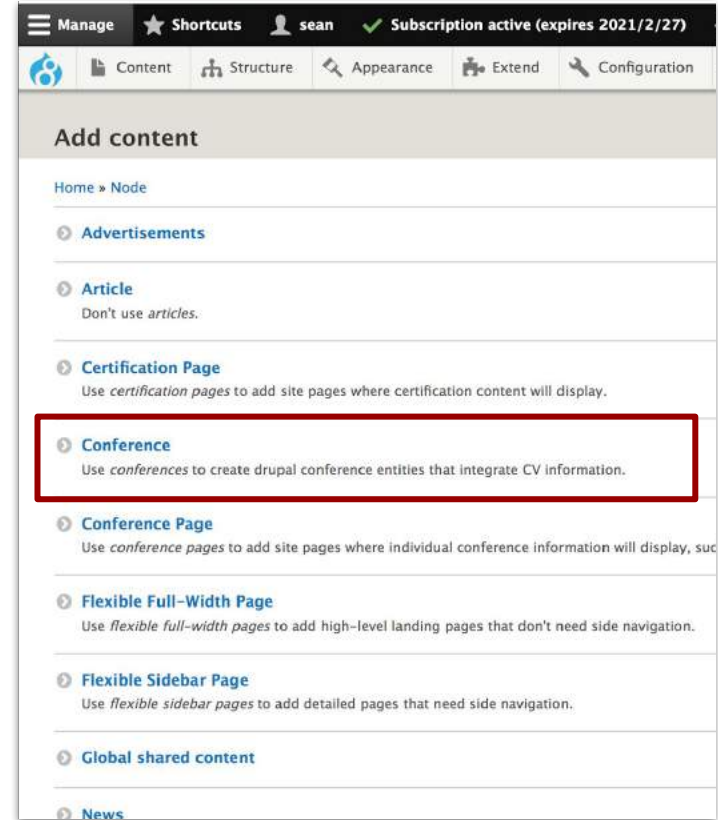
Conference: Create a Conference

First, create a "Conference"

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

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."

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.hcca-info.org/node/add/conference_pages
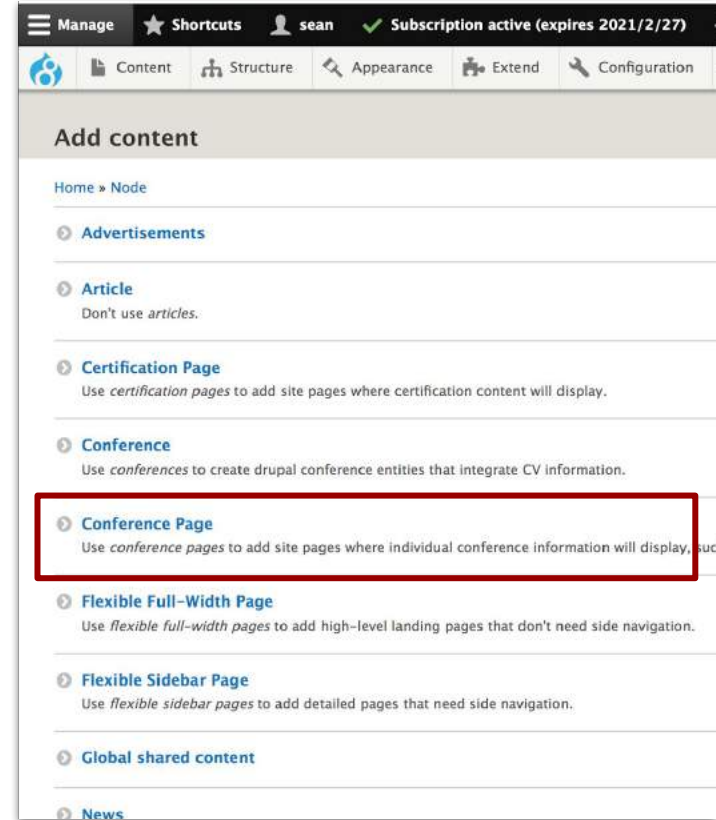
Conference: Add Conference Page Detail

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.

Tip: Institute Conference pages should use the large "Display Style" for the "Conference Header."

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

📄 Content 🗂 Structure 🔍 Appearance 📥 Extend 🔧 Configuration

Create Conference Page

Home » Node » Add content

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

Page Name *

Conference Header

▸ CONFERENCE ENTITY NAME

Conference Header Height

Condensed ▾

Select a display height for the conference header. Choose "Condensed" for interior conference detail page "Large" for landmark conferences, such as the compliance institute.

Optional Page Headline

Add an optional headline to the conference page that will appear below 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."
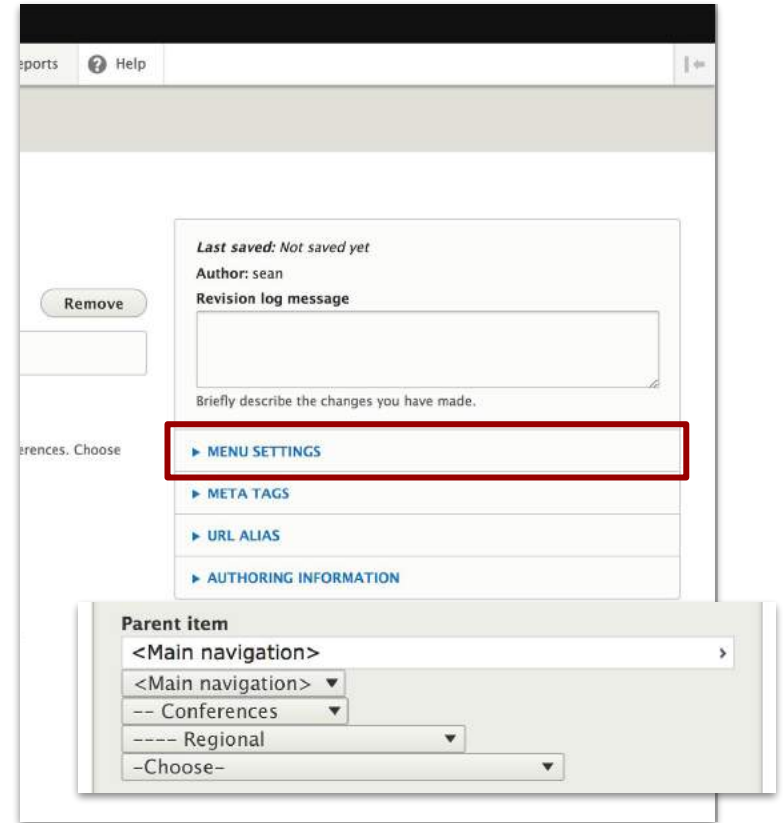
Conference: Add a Homepage

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."

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."
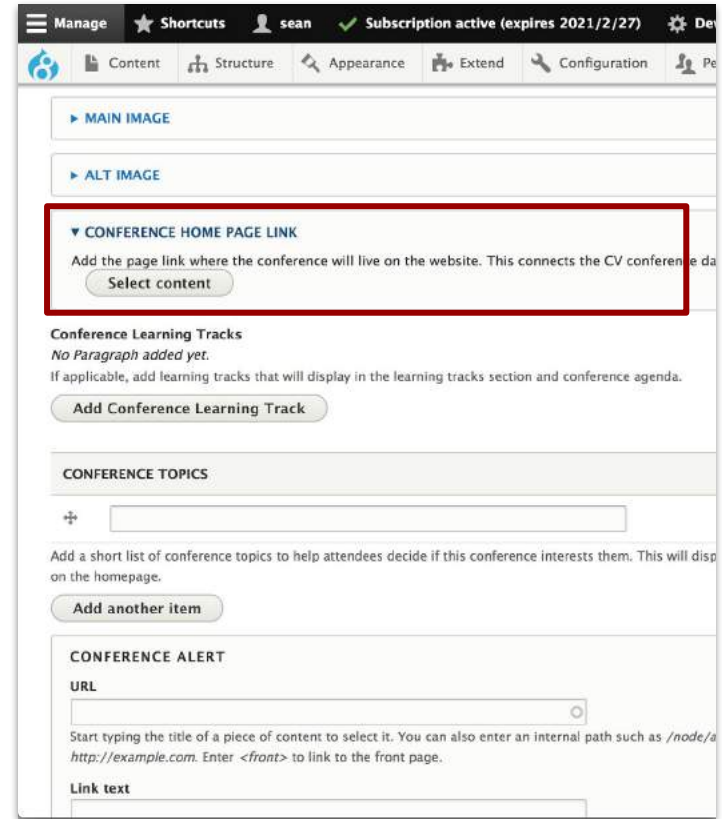
Conference: Create the Homepage Link

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."

Conference: Required Pages

Every Conference should have two pages:
- Home
- Registration

Create another "Conference Page" to add the Registration Page
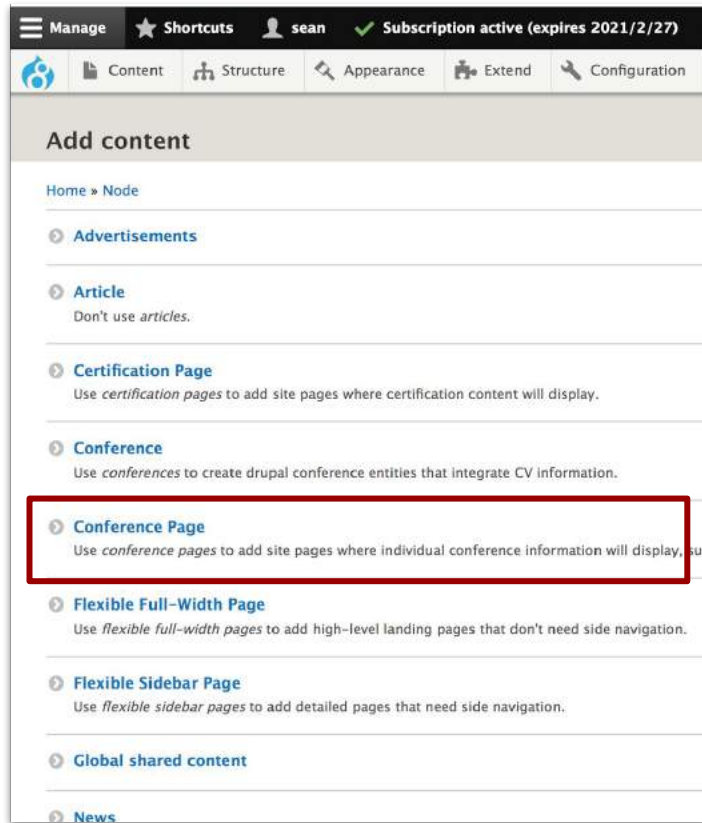
Conference: Add a Registration Page

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

Conference: Registration Menu Link

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

Click "Save."

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.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.

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."
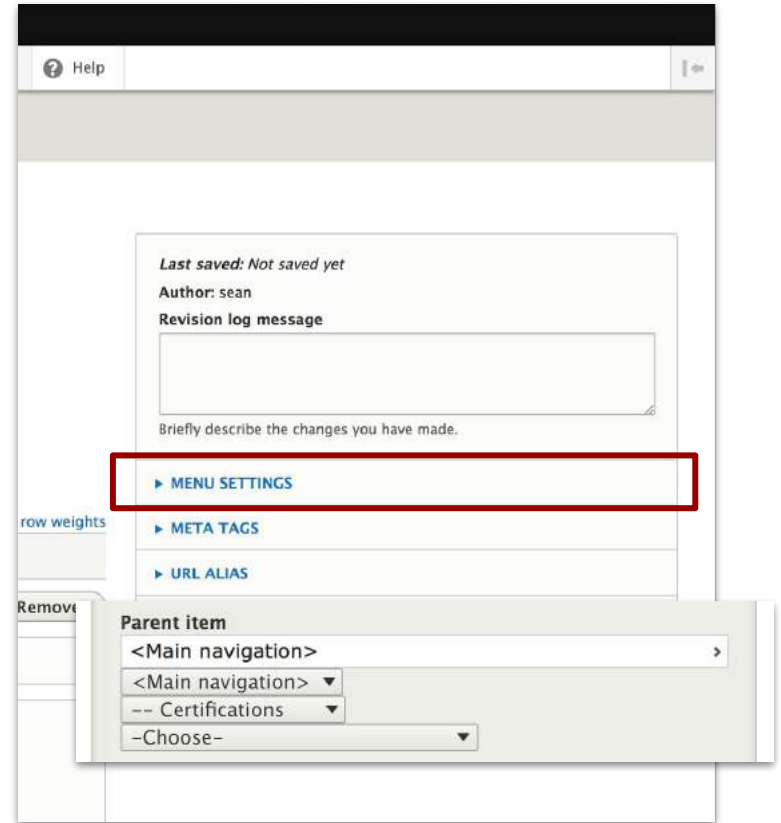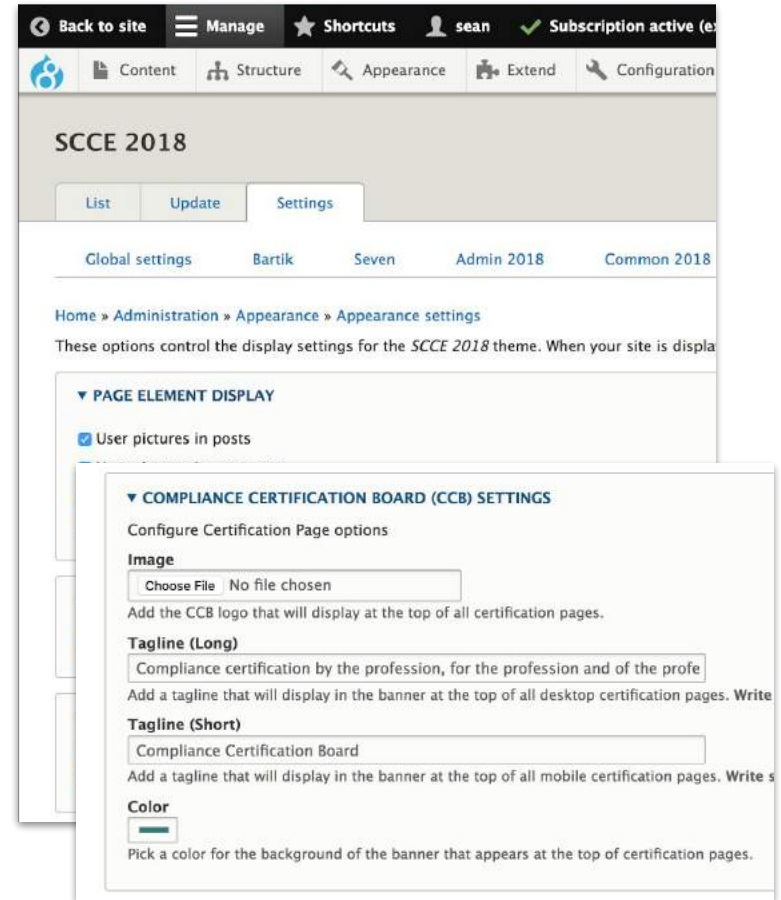
Certification Pages: Modify Settings

Each Certification Page with 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/

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_with_sidebar

https://stage.hcca-info.org/node/add/flexible_full_width
https://stage.hcca-info.org/node/add/flexible_with_sidebar
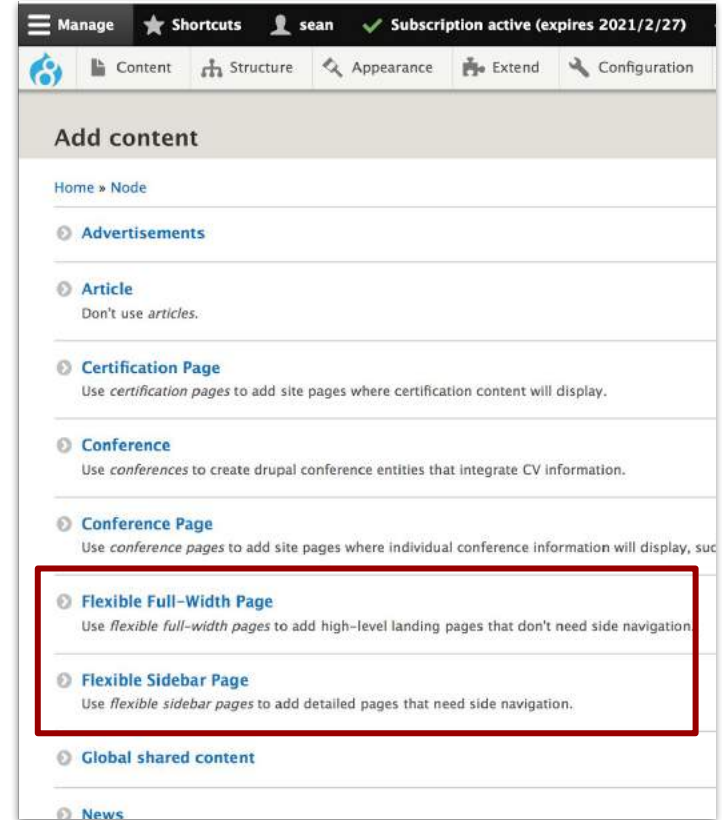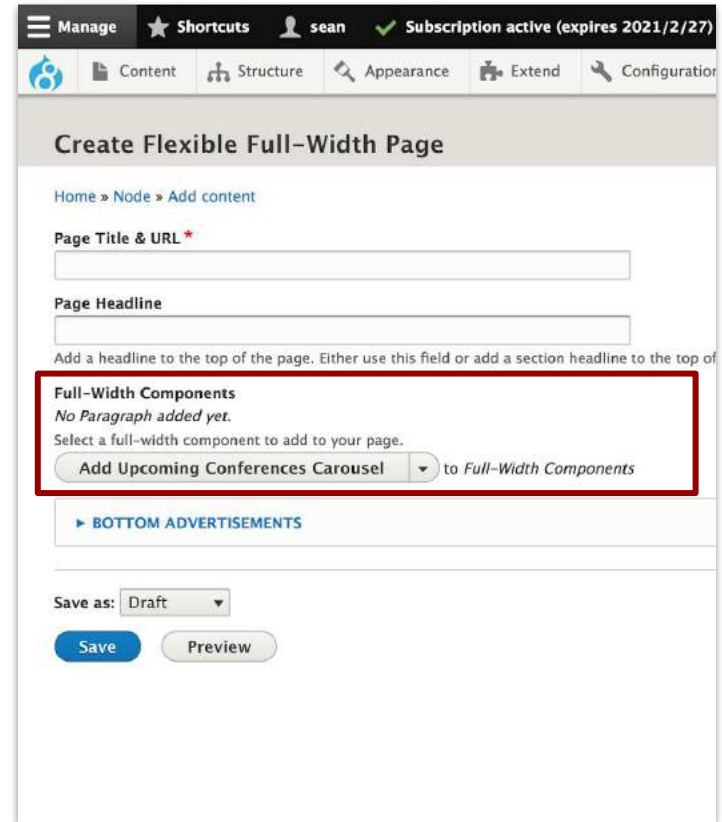
Flexible Pages: Adding Content

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.

Global Shared Content

Global Shared Content

Global shareds 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.hcca-info.org/node/add/global__shared__content
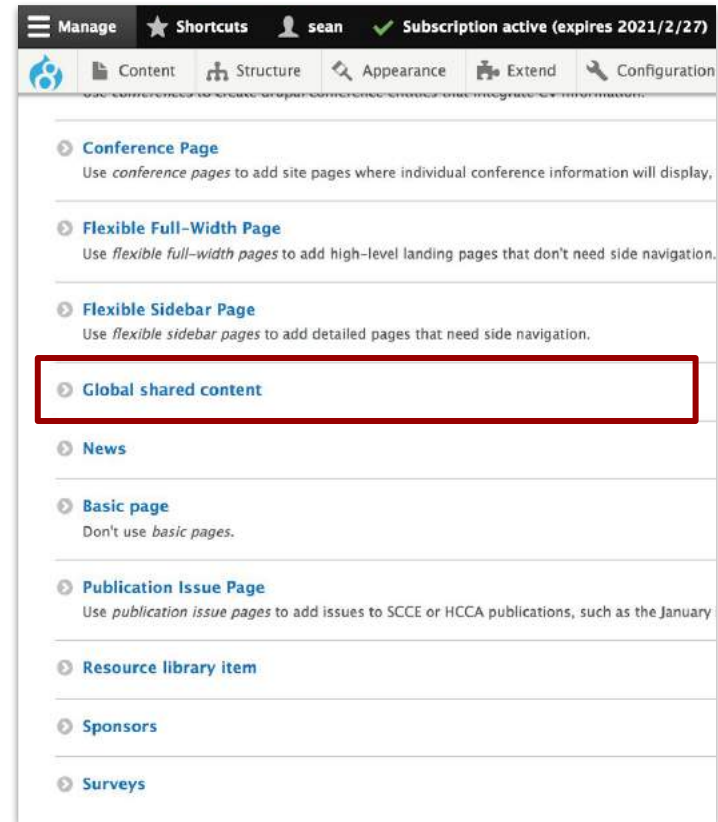
Global Shared Content: Adding Detail

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.

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."

Publication Issue Page (Magazines and Newsletters)

Publications: In the Menu
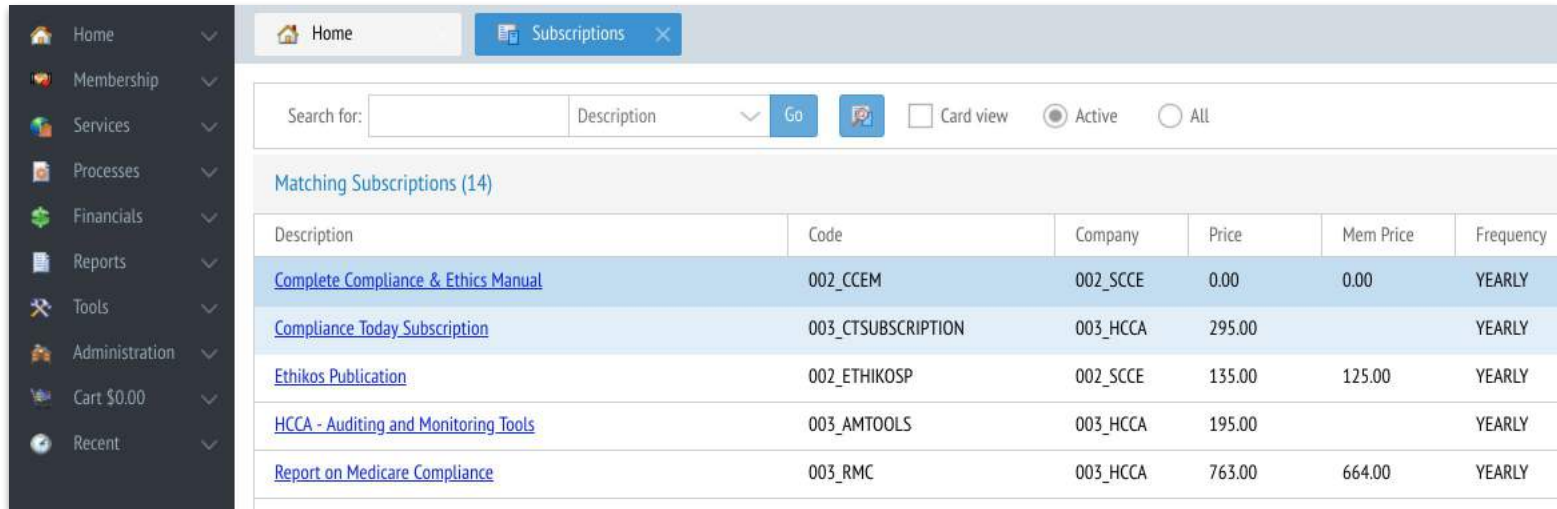
Magazines and Newsletters use the same underlying principles for content management as the other content types.

However, the content for each of these pieces are located in different places in the main menu.
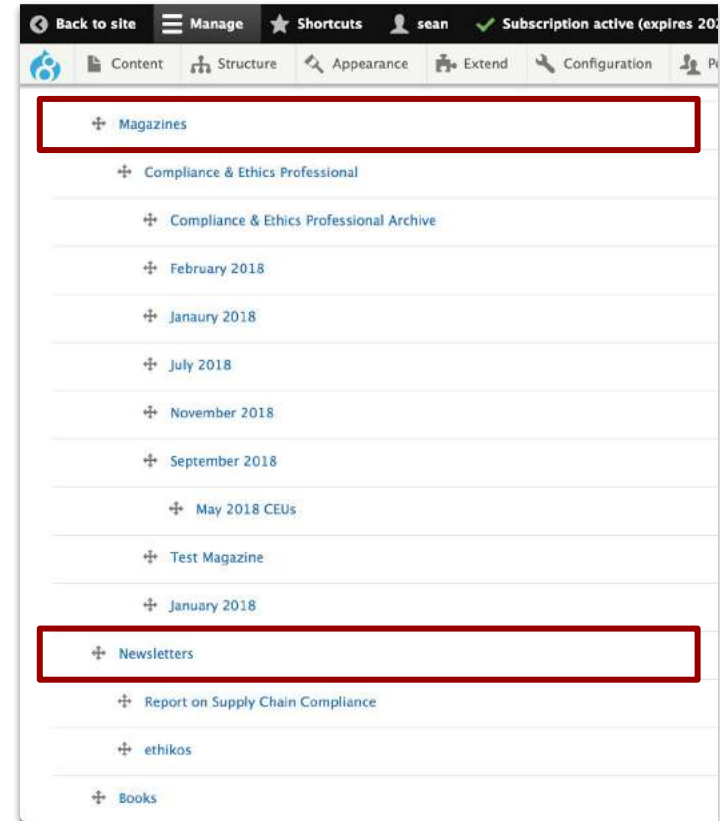
Publications: As on ClearVantage

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

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.

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.
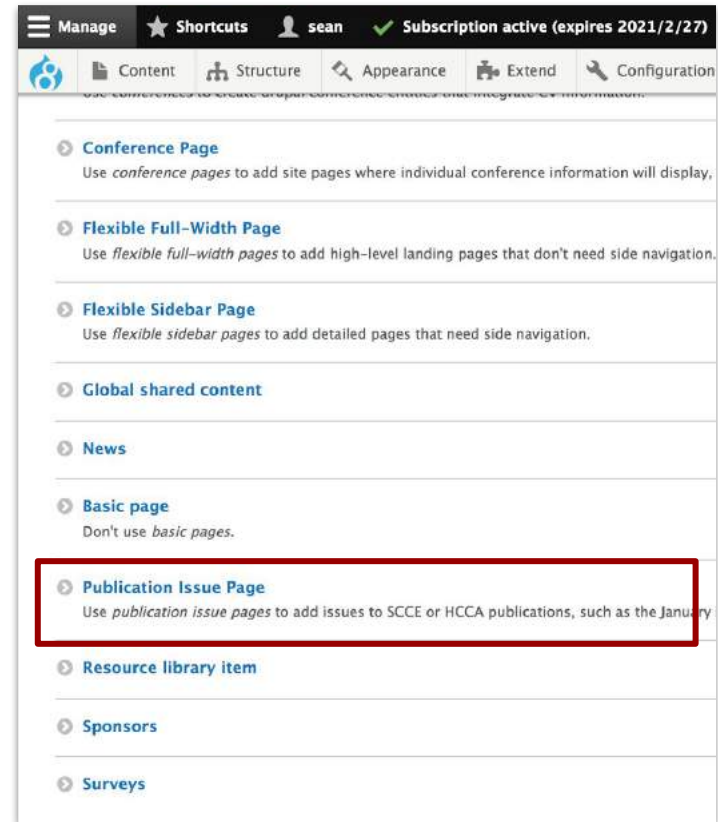
Publication Issue Page (Magazines)

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

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."

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."

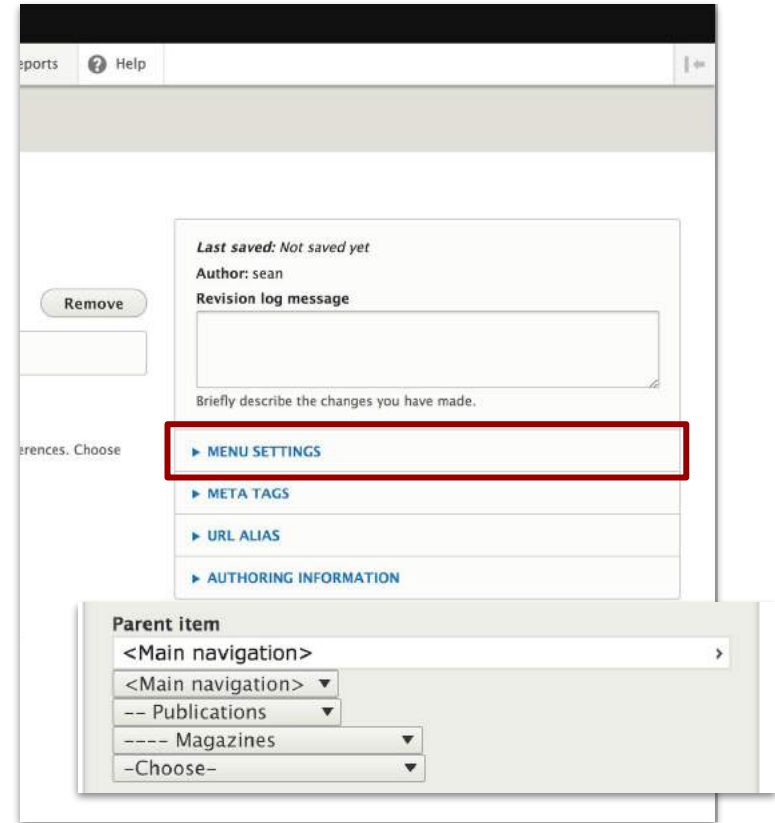## Publication Issue Page: Menu Link

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.
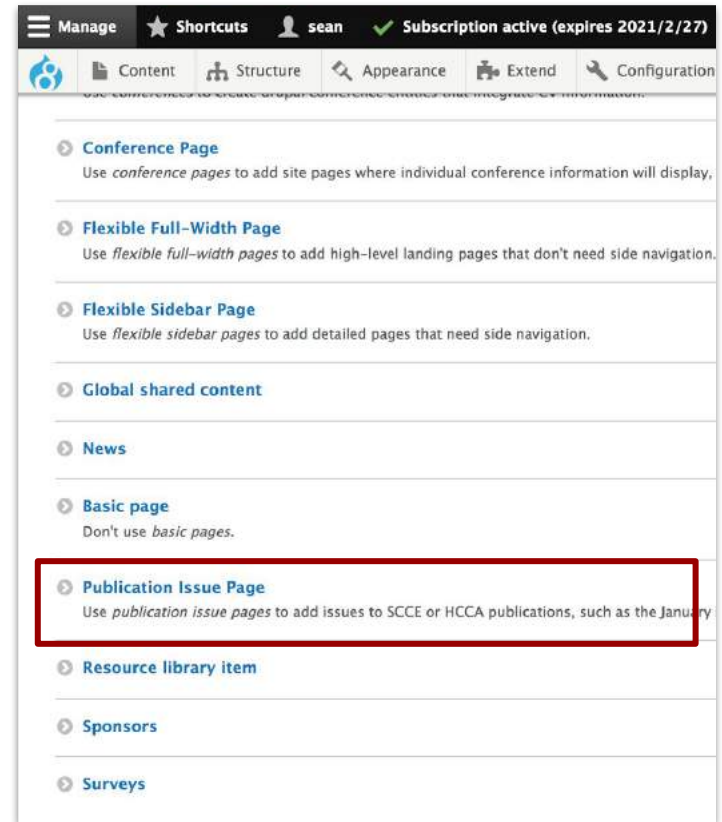
Click "Save."

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

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."

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."

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.hcca-info.org/node/add/resource_library_item
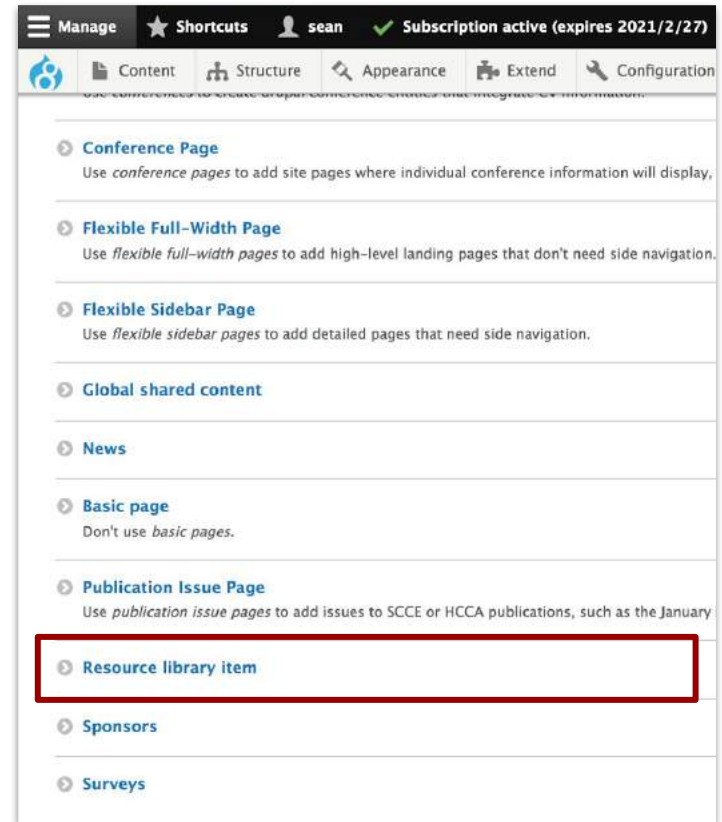
Resource Library Item: Adding Content

Fill out any details related to the Resource Library Item.

The "Type" field will autocomplete taxonomies as you start typing.

Click "Save."

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."

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.

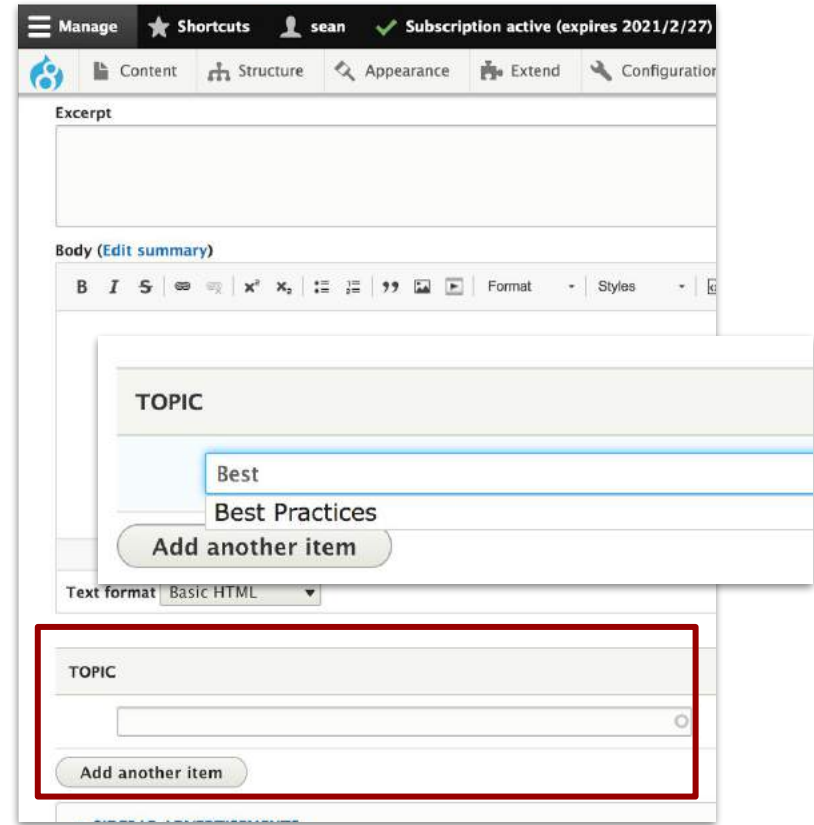## Resource Library Item: Topic

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
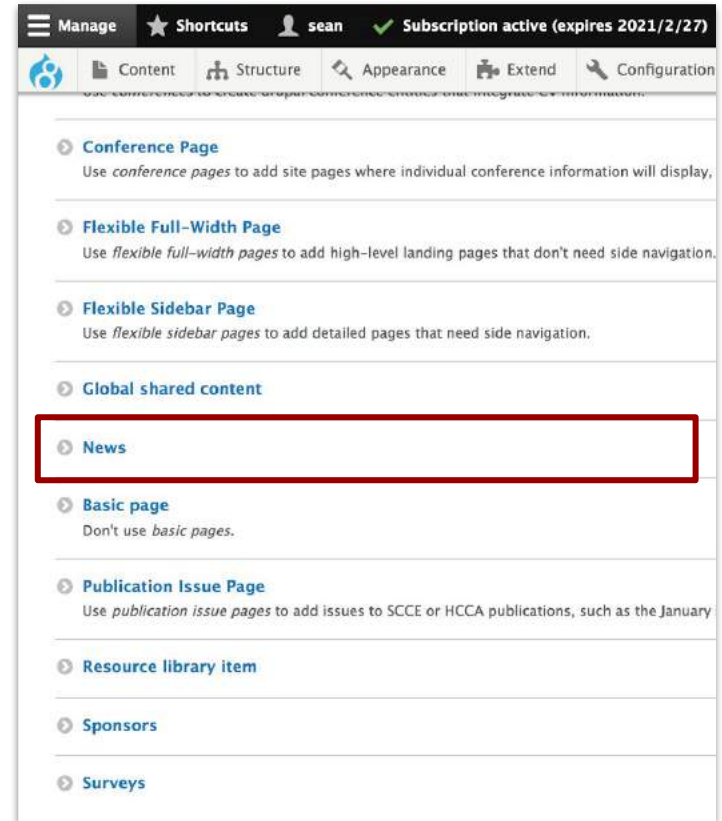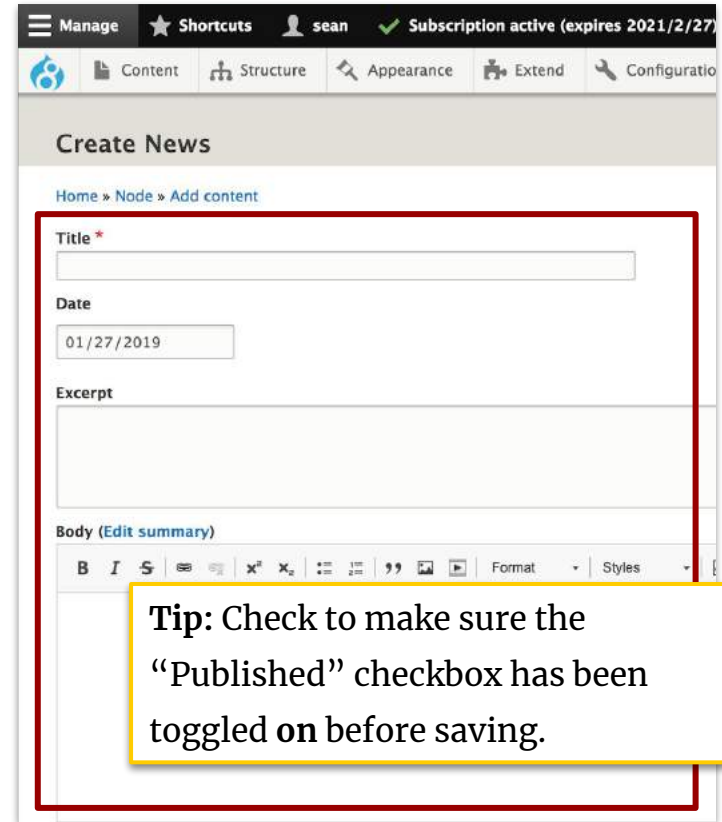
News: Adding Content

Fill out any details related to the News item.

Click "Save."

Create News

Home » Node » Add content

Title *

Date

01/27/2019

Excerpt

Body (Edit summary)

B   I   S | ∞ | x²   x₂ | ≔   ≔ | ,,   ▣   ▶ | 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.

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.

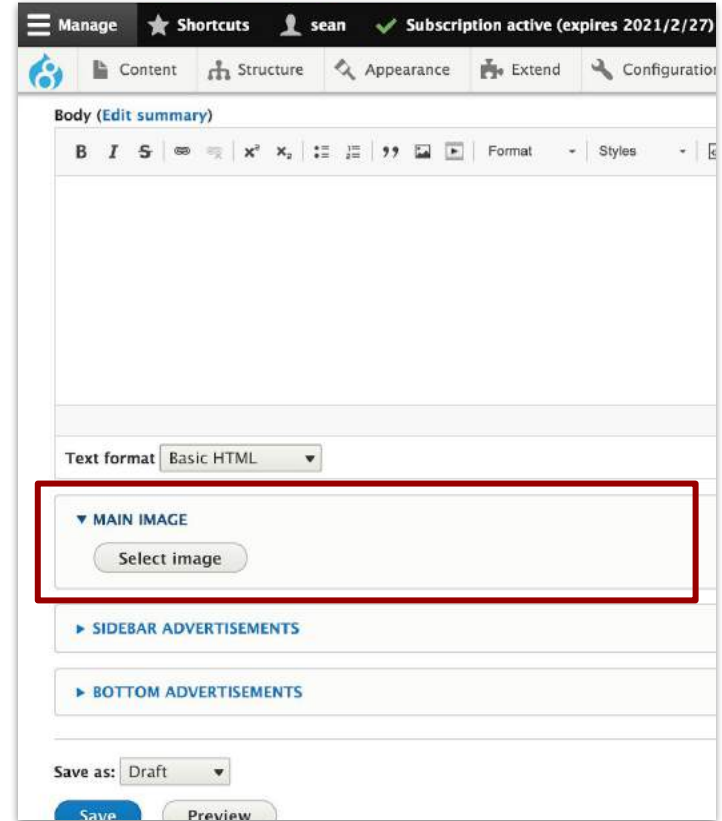https://stage.corporatecompliance.org/node/add/surveys
https://stage.hcca-info.org/node/add/surveys

Surveys: Adding Content

Fill out any details related to the Survey.

Click "Save."

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.

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.

Menus

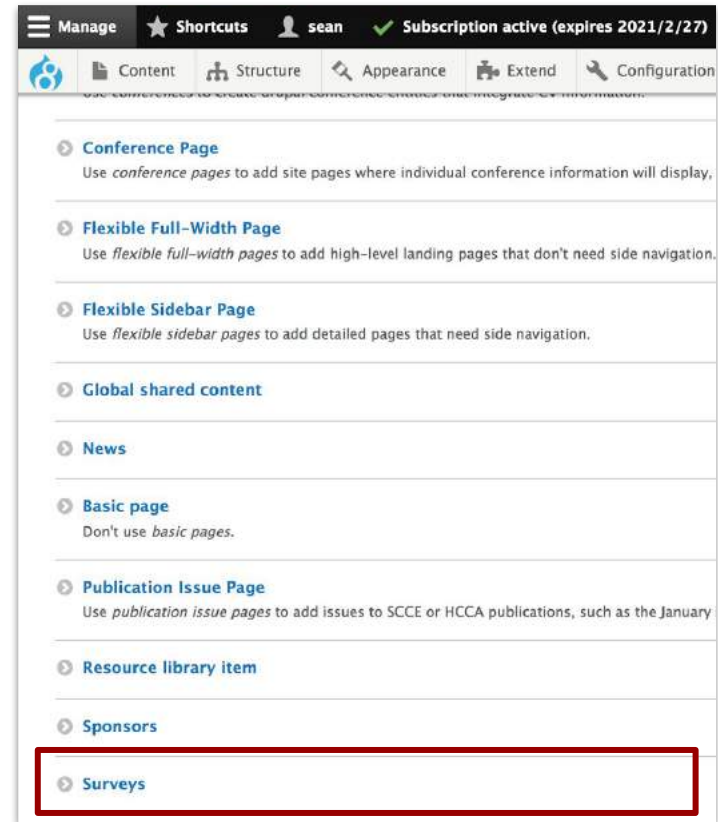## Menus

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
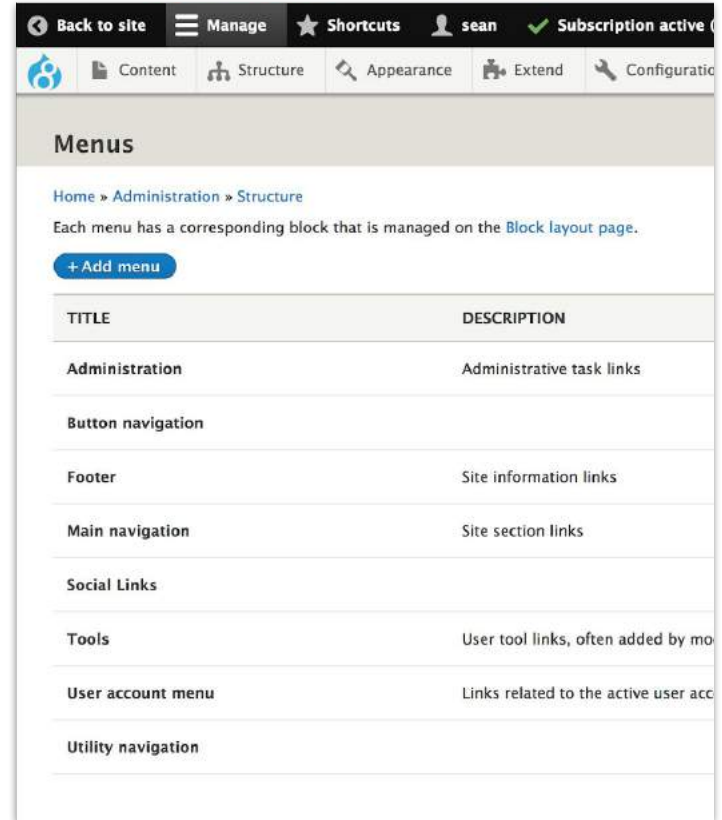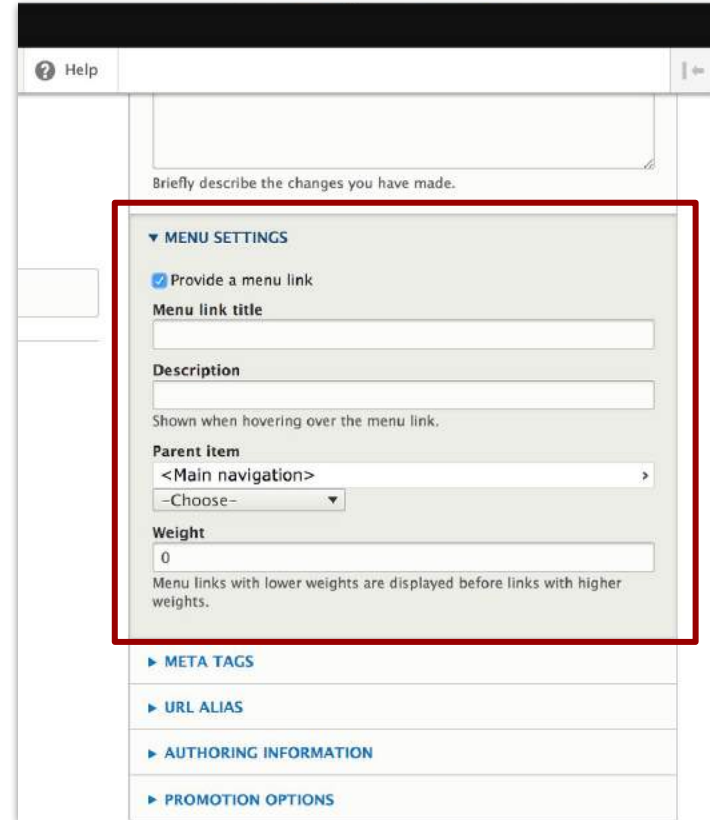
Menus: Pages

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

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

URL Recommendations

URLs - Recurring Conferences

General Conference URL:

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

- 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

- 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