



User's Guide

Version 1.1.3



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Chapter One

Getting Started

In this section:

Logging in

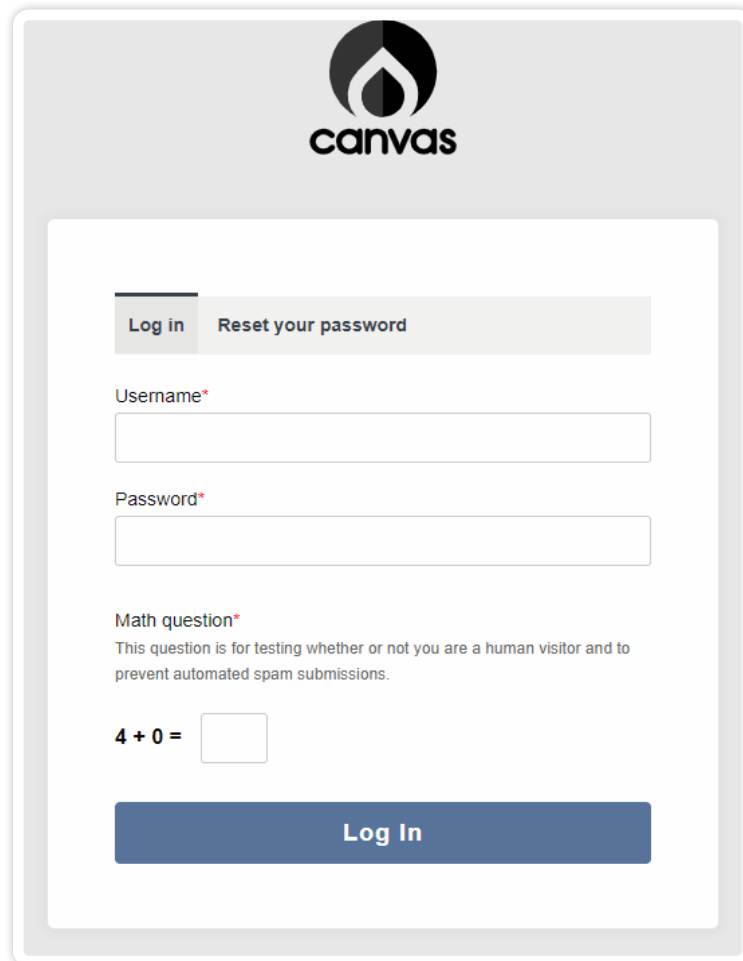
Changing your password

Administration Menu

Getting Started

Logging In

Type “/user” after your website URL to access the login page. Enter your username and password and complete the Math Captcha to log in to the site.

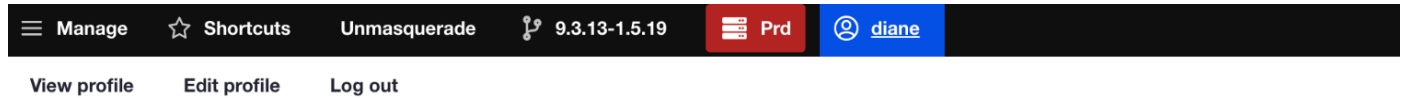


The screenshot shows the Canvas login interface. At the top center is the Canvas logo, which consists of a stylized flame icon above the word "canvas". Below the logo is a navigation bar with two tabs: "Log in" (which is selected and highlighted) and "Reset your password". Underneath the tabs are three input fields: "Username*", "Password*", and "Math question*". The "Math question*" field contains the text "4 + 0 =" followed by a small square input box. At the bottom of the form is a large blue button labeled "Log In".

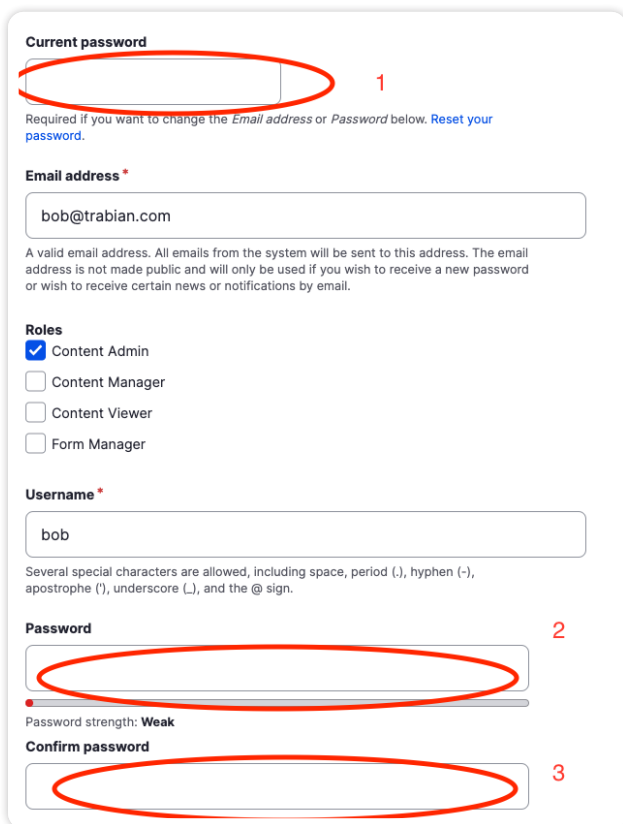
Changing Your Password

After you log in for the first time, update your password to something that only you would know.

1. Find your username in the middle of the black navigation bar at the top of the screen. Click it to open the profile menu.



2. Click "Edit profile."
3. Reset it by entering your current password at the top of the page and updating to the new password beneath your username. You will have to confirm the password after it is entered.

A screenshot of the user profile edit form. The form is white with a light gray border. It contains several sections: "Current password" with a text input field circled in red and a red "1" next to it; "Email address" with a text input field containing "bob@trabian.com"; "Roles" with four checkboxes, the first of which is checked; "Username" with a text input field containing "bob"; "Password" with a text input field circled in red and a red "2" next to it, and a password strength indicator below it showing "Weak"; and "Confirm password" with a text input field circled in red and a red "3" next to it. A "Reset your password" link is visible under the current password field.

4. Hit "Save" at the bottom to update the password.

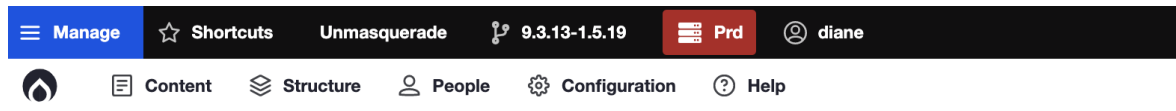
NOTE: Passwords must contain the following to be used per our password policy:

- At least 12 characters
- Lowercase letters
- Uppercase letters
- Numbers
- Punctuation

NOTE: If the time zone is updated on a user's page, it will override the website time zone setting. Keep the time zone to where the branch is located.

Administration Menu

Once you have successfully logged in, a navigation bar will appear at the top of the website as shown below. The following are dropdowns (or tabs) that then have different features. Click on “Manage” to see the gray Administration toolbar.



- ▶ **Content** – Clicking on Content takes you to a listing of the published and unpublished pages on your website. Hovering over Content will allow you to add certain content to your site, such as Alerts, Basic pages, Landing pages, and manage your files/media.
- ▶ **Structure** – This is where you will find Block Layout, Menus, Taxonomy, webforms, and custom tokens.
- ▶ **People** – If you click on People, you can view all users and can edit accounts to assign/update roles and update/reset passwords. If you hover over People, you can choose Flood Unblock (which will allow users who have locked themselves out to try to log in again) and add users.
- ▶ **Configuration** – Located in this section will be all of your configuration tabs. A few examples would be UI configuration, System configuration, Canvas Settings and Web Services.
- ▶ **Help** – This is where you can find more information on how to manage your site.

Chapter Two

Content

In this section:

Content Types

Scheduled Content

Structure

People

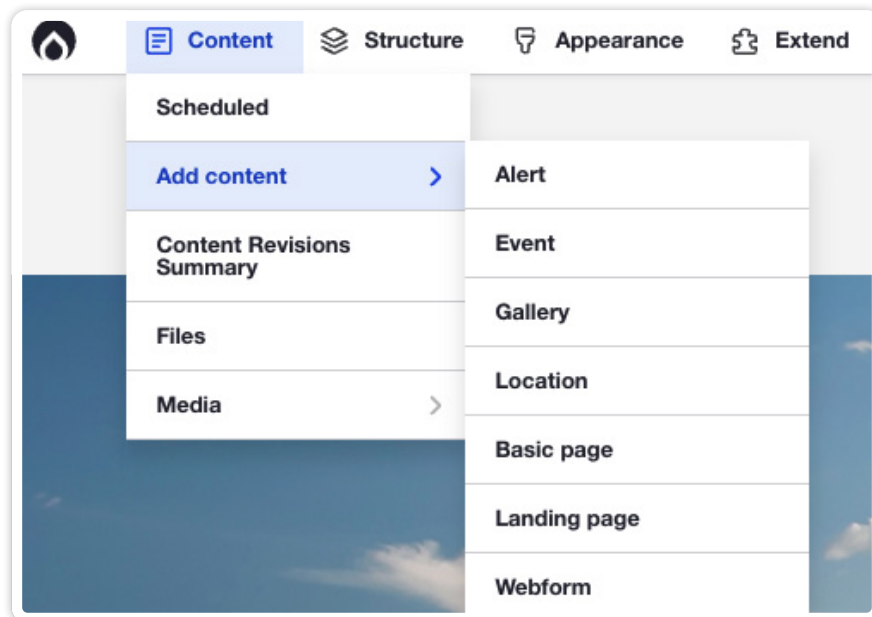
Configuration

Content

Content Types

Prior to providing instruction on how to add new pages to your site, it is important to introduce you to available content types that you will use to create new pages. This can be slightly different between financial institutions. If an additional content type was created for your financial institution, then there will be instructions on how to manage it provided.

Please see content type options below:



Alert – Manage the alert banner(s) that appears on your site. Typically used to announce branch closures, website maintenance, and other outages or important messages.

Blog Page (if applicable) – Manage specific blog pages for your site. These pages are the articles that make up the blog page on your site.

Event – Manage the event postings that appear on your website. These are typically single pieces of content that are then aggregated on the homepage, news page, and/or elsewhere as configured on your website.

Gallery – Manage an image gallery on your website.

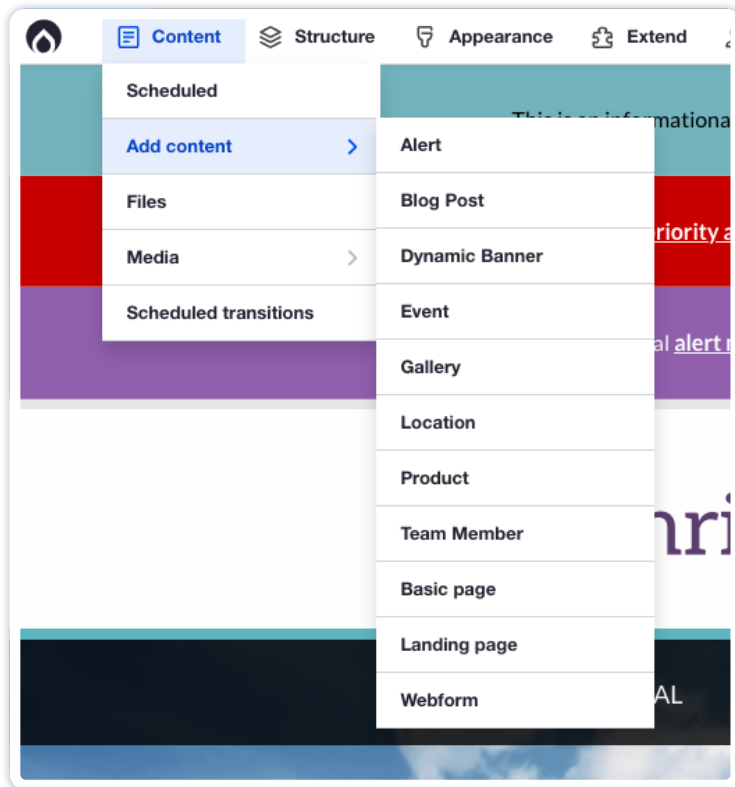
Basic Page – Manage the internal pages of your site. This page is made up of content areas with flexible content pieces and can include a sidebar section.

Landing Page – Manage the homepage or a special landing page of your website. This page is made up of content areas with flexible content pieces and does not include a sidebar section.

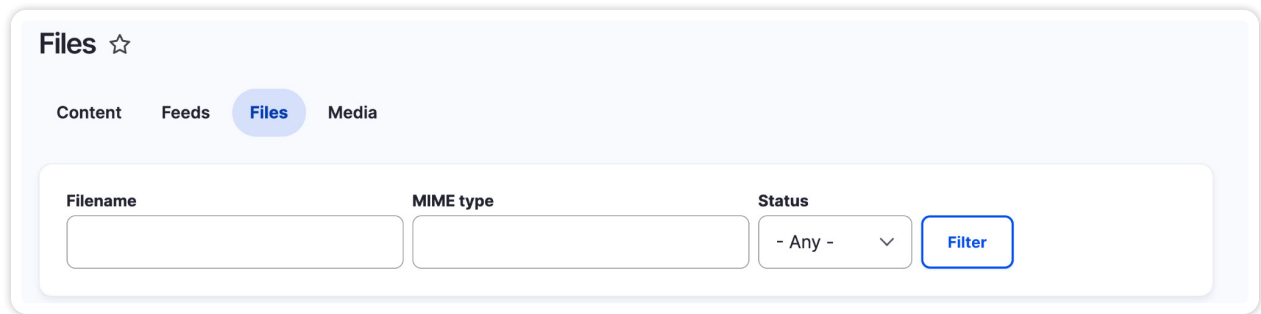
Webform – Manage CMS webforms. This is for forms built using the CMS webforms only. Custom-built webforms and embedded 3rd party forms can only be edited by the Trabian development team.

Add Content

Under the Content menu item is “Add Content” where you can see the types of content you can create on your website. Your website may not have all of these, but will mainly include Basic Page, Landing Page, Alert and Webform.



Files

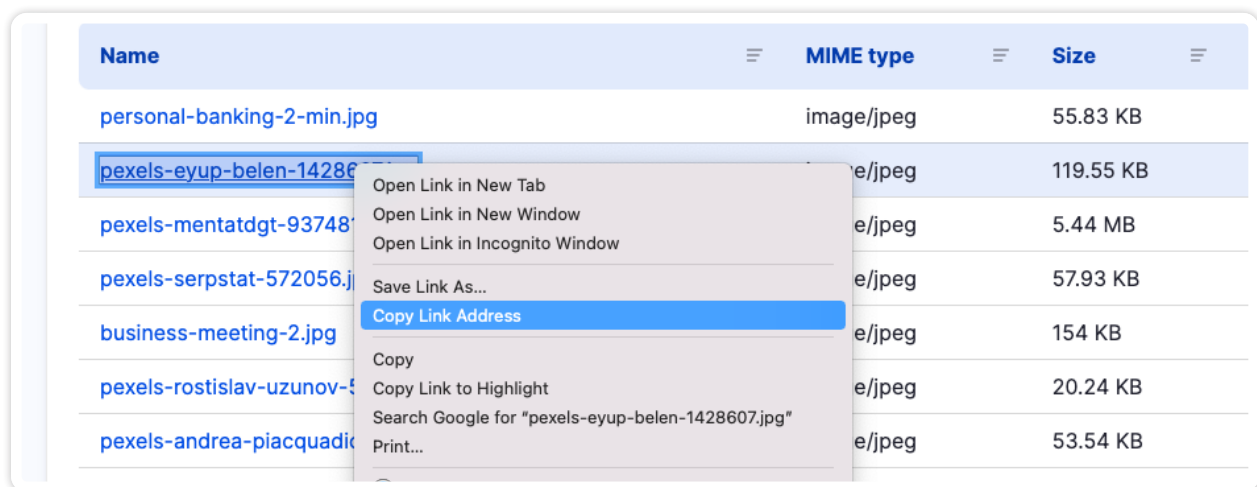


Clicking on Files will direct you to a page with a listing of all of the images and documents on the site. You have the ability to search for content that has been uploaded to your site. You can search by:

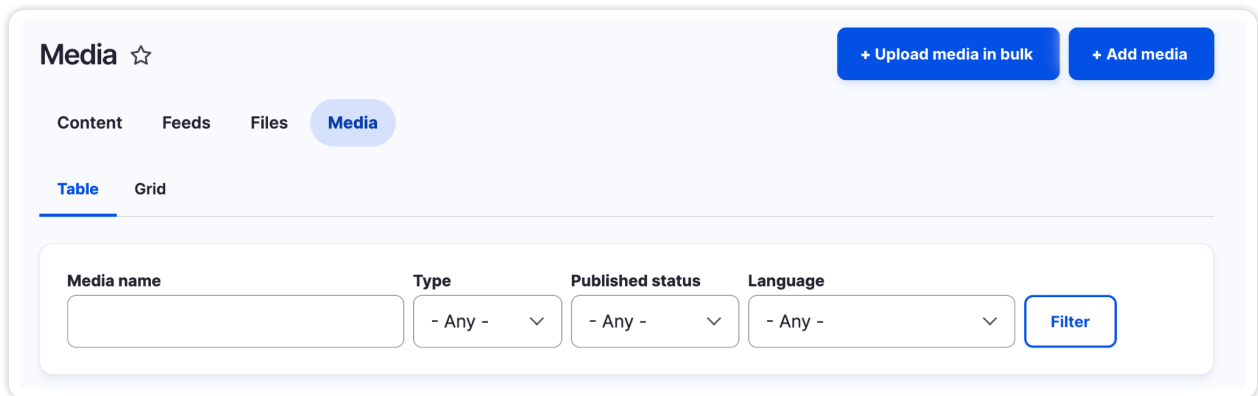
- ▶ **Filename**
- ▶ **MIME Type (file type, e.g. PDF)**
- ▶ **Status**

You can also see when the file was loaded, changed, and how many times it is being used on your site.

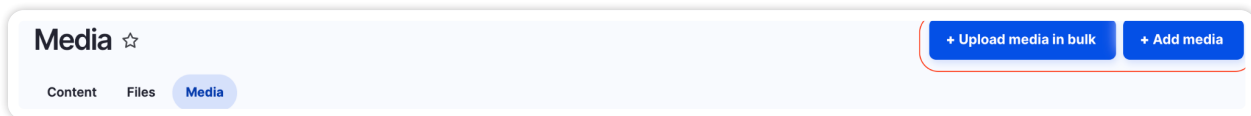
If you need to copy a URL link to one of the files like a PDF, you can right-click on the filename and select “Copy Link Address.”



Media



To view all of the media files uploaded to your website, select the Media tab at the top of the Content page. At the top right of the Media page, you have the option to Upload Media in bulk (multiple media files) OR Add media (singular media file).



Directly under the Media tab, you have the option to change the way you see your media files:

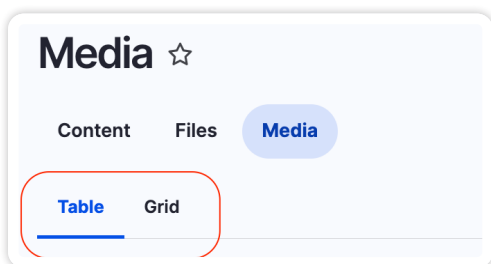
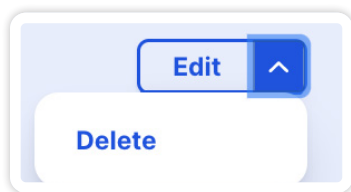


Table View

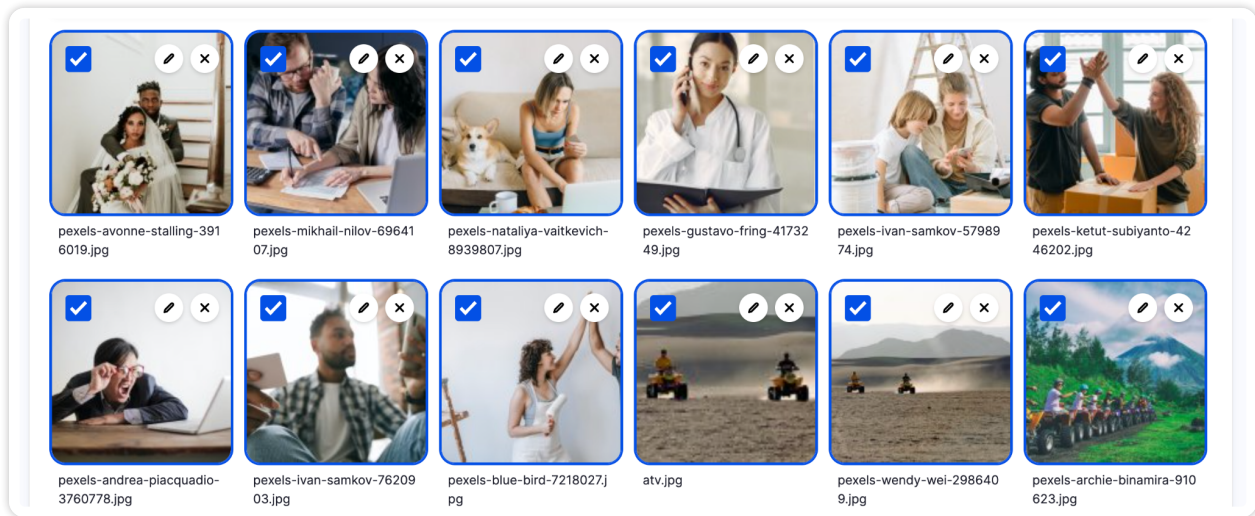
<input type="checkbox"/>		pexels-ketut-subiyanto-4246202.jpg	Image	fub_vunit	Published	04/25/2022 - 16:34	Edit ▾
<input type="checkbox"/>		pexels-andrea-piacquadio-3760778.jpg	Image	fub_vunit	Published	04/25/2022 - 14:16	Edit ▾
<input type="checkbox"/>		pexels-ivan-samkov-7620903.jpg	Image	fub_vunit	Published	04/25/2022 - 14:15	Edit ▾
<input type="checkbox"/>		pexels-blue-bird-7218027.jpg	Image	fub_vunit	Published	04/25/2022 - 14:14	Edit ▾

In Table view, you can sort the columns by Media Name, Type, Status, and Updated. You can view the user who uploaded the file (the website calls it Author). If you select on the Edit dropdown, you are able to choose Edit or Delete.



NOTE: If you decide to delete a media file, THIS IS PERMANENT. It will ask “Are you sure?” and give you the opportunity to cancel. There is NOT a recycle bin to retrieve deleted items from. You will, of course, have the ability to re-upload the same file if needed.

Grid View



Changing the view to Grid is a great way to view thumbnails of all your images easily. In this section, you are able to filter by:

- ▶ Published status
- ▶ Media name
- ▶ Type (e.g. document or image)
- ▶ Language
- ▶ Sort by

If you want to edit the Media file, select on the Pencil Edit icon and you will be directed to the Edit page for that image. This is where you can add Alternate Text to images.

Scheduling Content

There are two ways to schedule content to automatically display and remove itself from the website. “Scheduled Transitions” is typically the best option and may be enabled on Basic Pages, Landing Pages, and Alerts. It allows you to create different versions of the content and schedule when to publish each revision. “Scheduled Content” is a different module which is enabled for content types like Events which are usually either “on” or “off.”

Scheduled Transitions

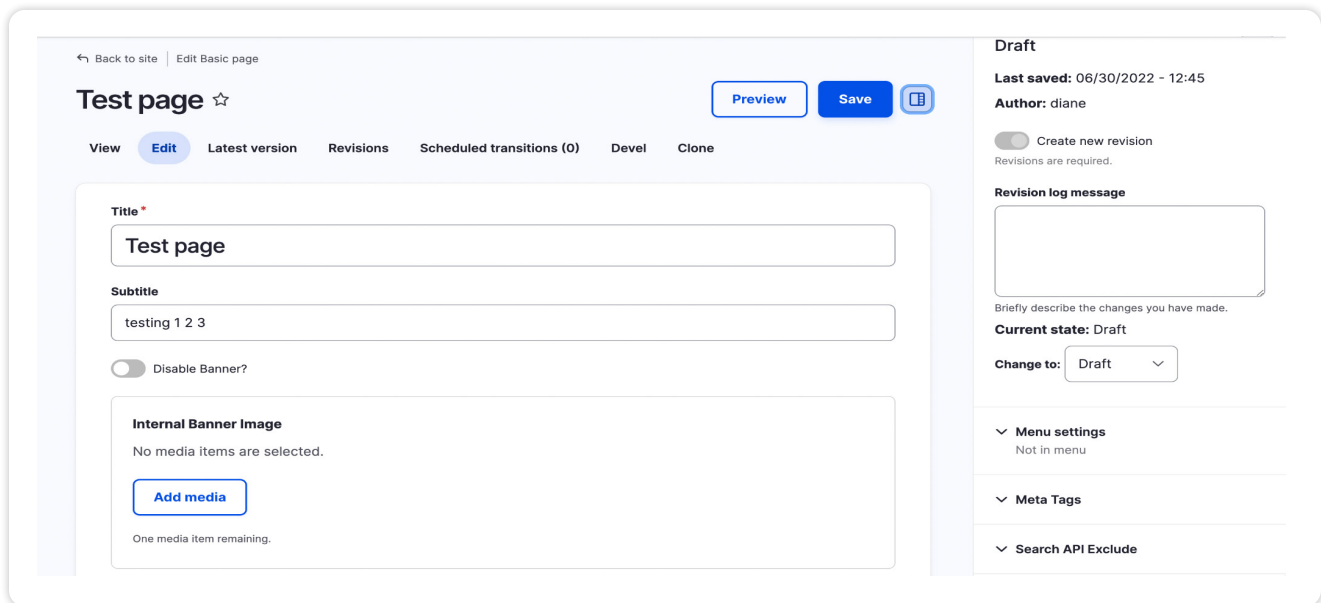
Scheduled Transitions are used when making a new revision of the content and to have it published at a certain date and time.

NOTE: It’s better to have a piece of content already in a Published state to be able to create a new revision from.

Be mindful of the time zone that the Regional Settings are set to in “/admin/config/regional/settings.”

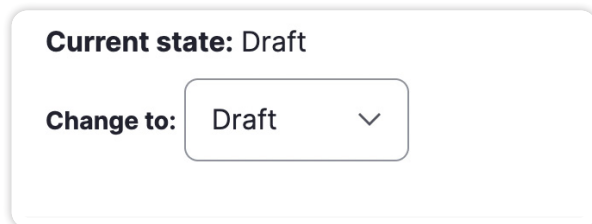
Creating a Scheduled Transition

5. “Edit” the page as normal



The screenshot shows the Canvas LMS page editor interface. At the top, there are navigation links for "Back to site" and "Edit Basic page". The page title is "Test page" with a star icon. Below the title, there are buttons for "Preview", "Save", and a document icon. A navigation bar includes "View", "Edit" (highlighted), "Latest version", "Revisions", "Scheduled transitions (0)", "Devel", and "Clone". The main content area has a "Title" field with "Test page", a "Subtitle" field with "testing 1 2 3", and a "Disable Banner?" toggle. Below that is an "Internal Banner Image" section with "No media items are selected." and an "Add media" button. The right sidebar shows the "Draft" state, with "Last saved: 06/30/2022 - 12:45" and "Author: diane". There is a "Create new revision" toggle and a "Revision log message" text area. Below that is a "Change to:" dropdown menu set to "Draft". At the bottom of the sidebar, there are sections for "Menu settings" (Not in menu), "Meta Tags", and "Search API Exclude".

6. In the settings sidebar, set the “Change to” dropdown to “Draft”



This image is a close-up of the settings sidebar from the previous screenshot. It shows the "Current state: Draft" label and the "Change to:" dropdown menu, which is currently set to "Draft".

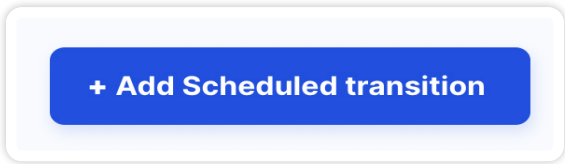
Under “Revision log message”, write a message so you know what the update is for. This is for internal purposes only.

7. Click “Save” to save the revision. This will keep the previous version of the content live on the site while you are working on a new draft.
8. Go to the “Scheduled Transitions” tab

Test page ☆

View Edit Latest version Delete Revisions **Scheduled transitions (0)** Devel Clone

9. Click on the button to add a scheduled transition



10. On the Add scheduled transition screen, choose the draft that you created.

Add scheduled transition ✕

Select which revision you wish to move to a new state.

Revision	State	Saved on	Saved by	Log
<input type="radio"/> Latest revision	Automatically determines the latest revision at time of transition.			
<input checked="" type="radio"/> #455	Draft	Tue, 05/24/2022 - 16:54	diane	removing background color
<input type="radio"/> #454	Published	Tue, 05/24/2022 - 16:53	diane	Created new Basic page

Revisions are ordered from newest to oldest.

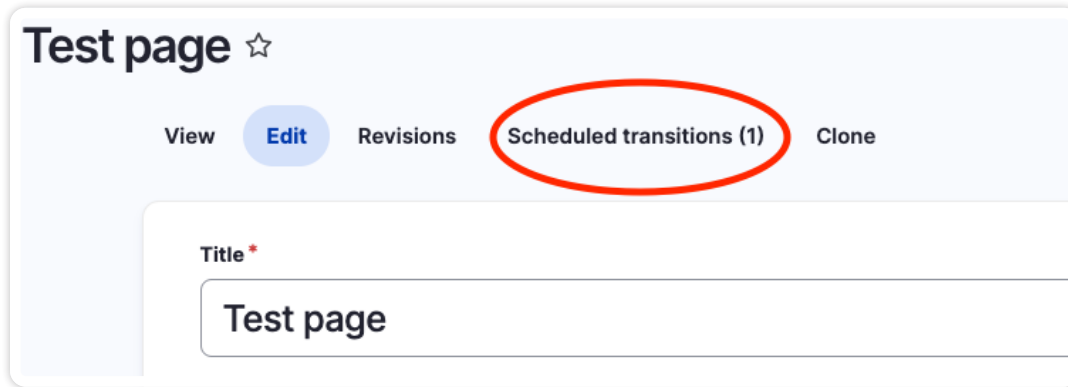
11. Under “Execute transition” choose “Publish” in the dropdown and set the date and time when the transition should take place.

Execute transition - Select - ▾ on date mm/dd/yyyy 📅 --:--:-- -- 🕒

12. When you’re finished, click “Schedule transition.”

Schedule transition

13. You should now see “Scheduled transition (1)” in the tab.



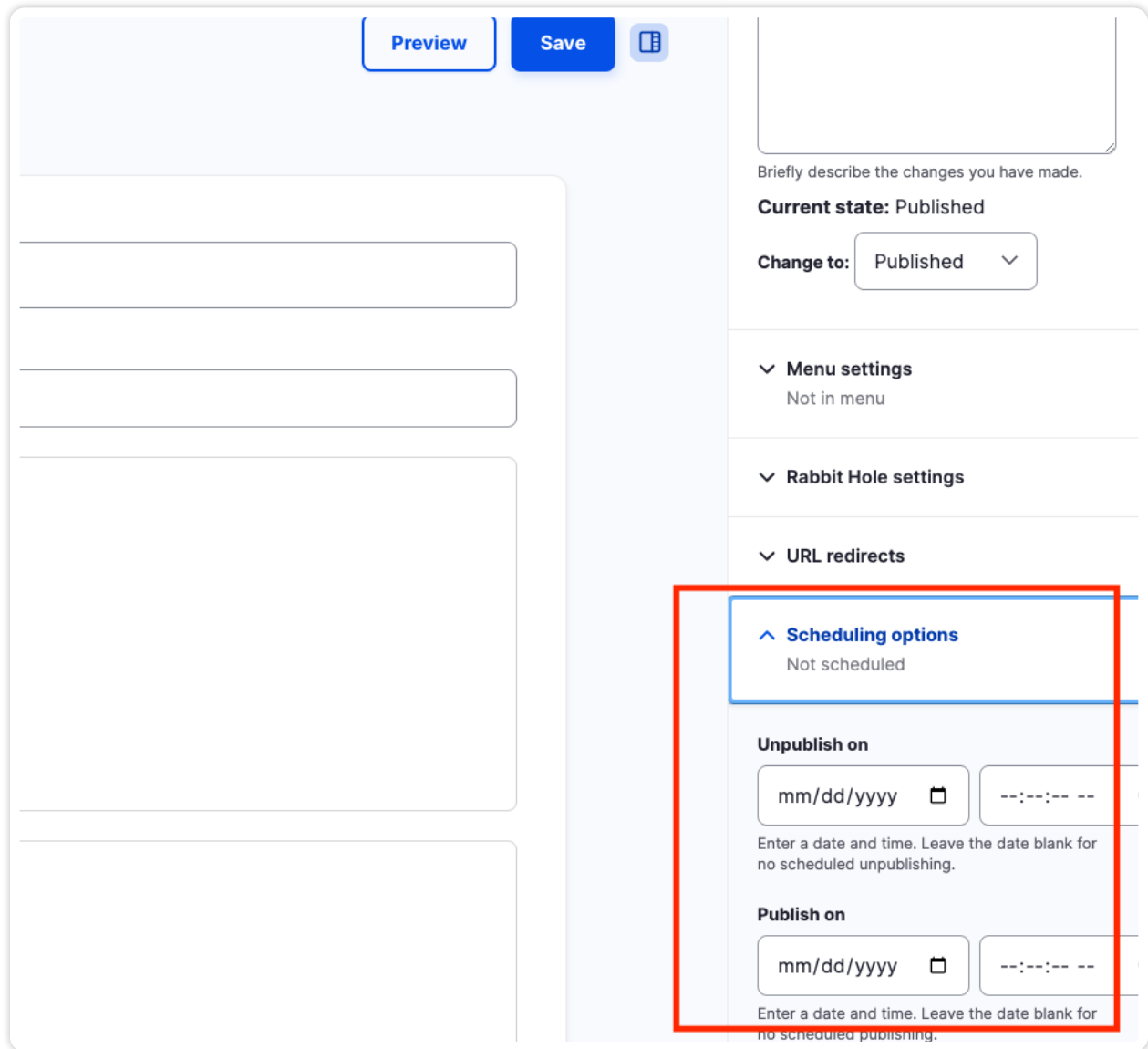
The screenshot shows the top navigation bar of a Canvas page titled "Test page" with a star icon. The navigation options are "View", "Edit", "Revisions", "Scheduled transitions (1)", and "Clone". The "Scheduled transitions (1)" tab is circled in red. Below the navigation bar, there is a form with a "Title*" label and a text input field containing "Test page".

NOTES:

- Must be 15 minutes or more in the future to take effect.
- Do not edit the page again after scheduling the transition or you may run into conflicts
- Do not schedule more than one transition or you may run into conflicts
- You can delete a scheduled transition and recreate it if changes are needed
- You can transition between states in whichever way you'd like, ie. Published to Unpublished.

Scheduled Content

Scheduled Content is used for Content Types like Events that are to be published and unpublished on a certain date. If enabled for that Content type, you will find it in the right sidebar when editing the content.



To see all the Scheduled Content on the website, go to the “Content > Scheduled” item in the admin menu or use the “Scheduled content” tab on the Content page (shown below).

Scheduled Content ☆

Content

Feeds

Files

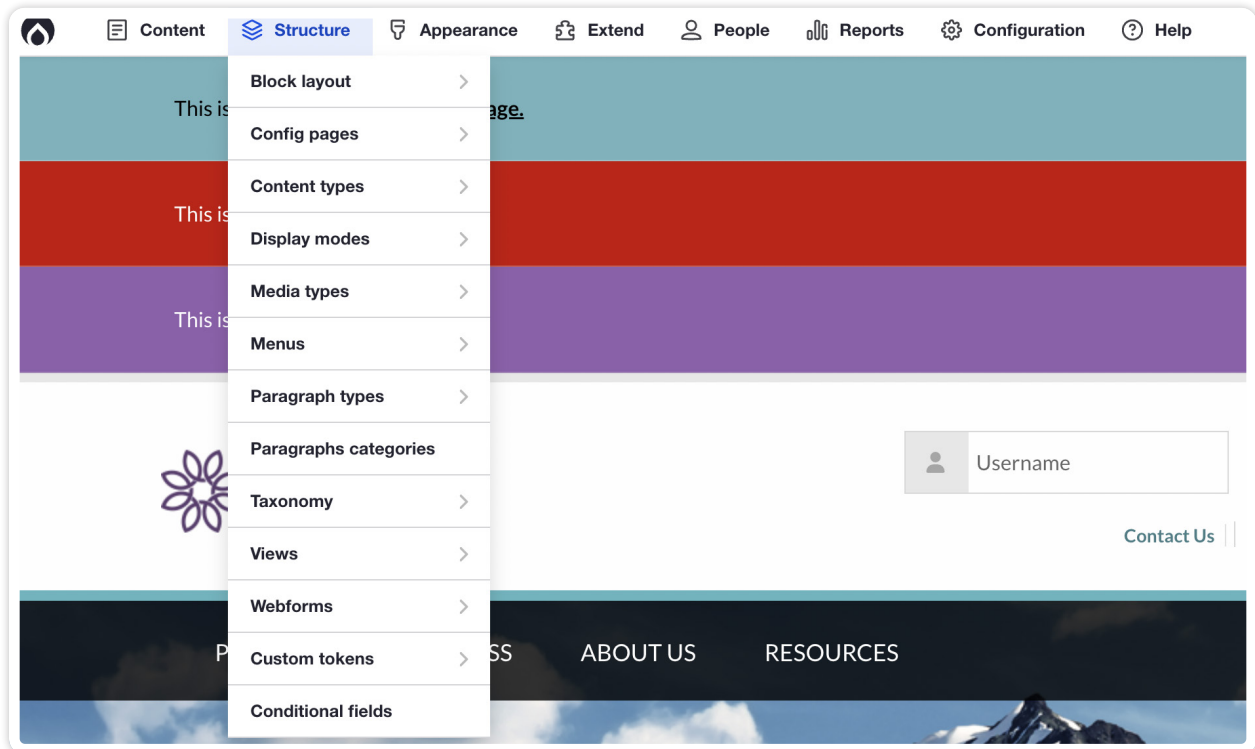
Media

Overview

Scheduled content

NOTE: If there is no content scheduled, then there will be nothing on this page.

Structure



Under the Structure menu item, you will be able to update blocks, menus, taxonomy, webforms, and custom tokens.

- ▶ **Blocks** – allow you to configure content that appears in preconfigured regions and allow you to place the same content on designated pages.
- ▶ **Menus** – throughout the site can be updated under Structure; these include the main navigation, auxiliary, and footer.
- ▶ **Taxonomy** – is for categorizing content for blogs and other features.
- ▶ **Webforms** – allow you to create forms that can be embedded on pages.
- ▶ **Custom tokens** – allow you to manage pieces of content (e.g., rates or disclosures) in one place; the interface will allow you to update content.

On this menu dropdown, you will have access to the following:

Block Layout

The Block layout page includes all the regions that have been created for your site. These are places to which blocks can be added. Think of this as rooms that you can move furniture in and out of. In this scenario, the regions are the rooms and the blocks are the furniture.

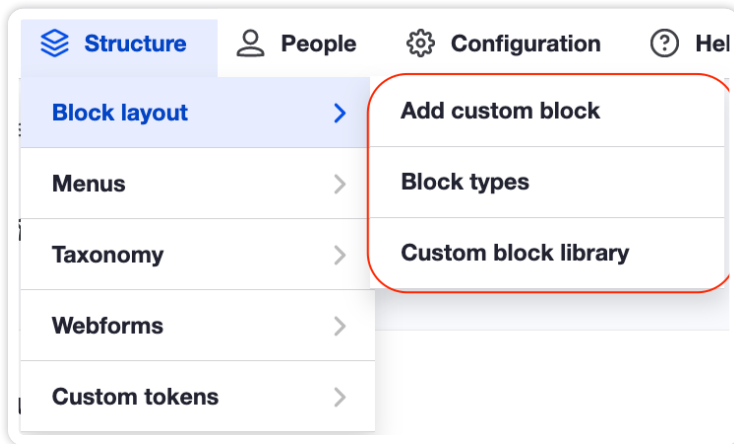
More than likely, you will not need to make any adjustments to this page unless you need to add a new block to a region (e.g., multiple alerts) or if you want to delete a block. Before deleting or moving blocks, ensure that you know what block you are updating. If you are unsure, we would recommend reaching out to the Trabian Support for guidance as you can easily make damaging changes to your site.

Things to keep in mind when working with blocks:

- ▶ Blocks are configured per site.
- ▶ You may add a block or change the region using the dropdown “Region.”
- ▶ To remove or unpublish a block, change the “Operations” dropdown status to “Disable.”
- ▶ “Configure” option opens the editor. Update accordingly and remember to save changes often. The “Save” button is at the bottom of the page.

NOTE: If it does not have a configure option, the block is not editable.

If you hover on “Block layout,” you will see the below three options:



Add custom block. When adding a custom block, fill out the appropriate fields shown below. Once complete, hit the ‘Save’ button at the bottom left.

NOTE: Some blocks may require additional styling when being added to particular regions.

Add custom block ☆

Block description *

Custom block example

A brief description of your block.

Body

B I S x² x₂ | T_x | [Icons] | Styles | Format | [Icons] | Source

Text format: Full HTML [About text formats](#)

Revision information
No revision

Revision log message

The log entry explaining the changes in this revision.

Save

Block types – Block types are typically used by Trabian developers when creating new features or modules. If a block type is needed for your site, it will be created for you.

Content Structure Appearance Extend People Reports Configuration Help

Home / Administration / Structure / Block layout / Custom block library

Custom block library ☆

+ Add custom block type

Block layout: Custom block library

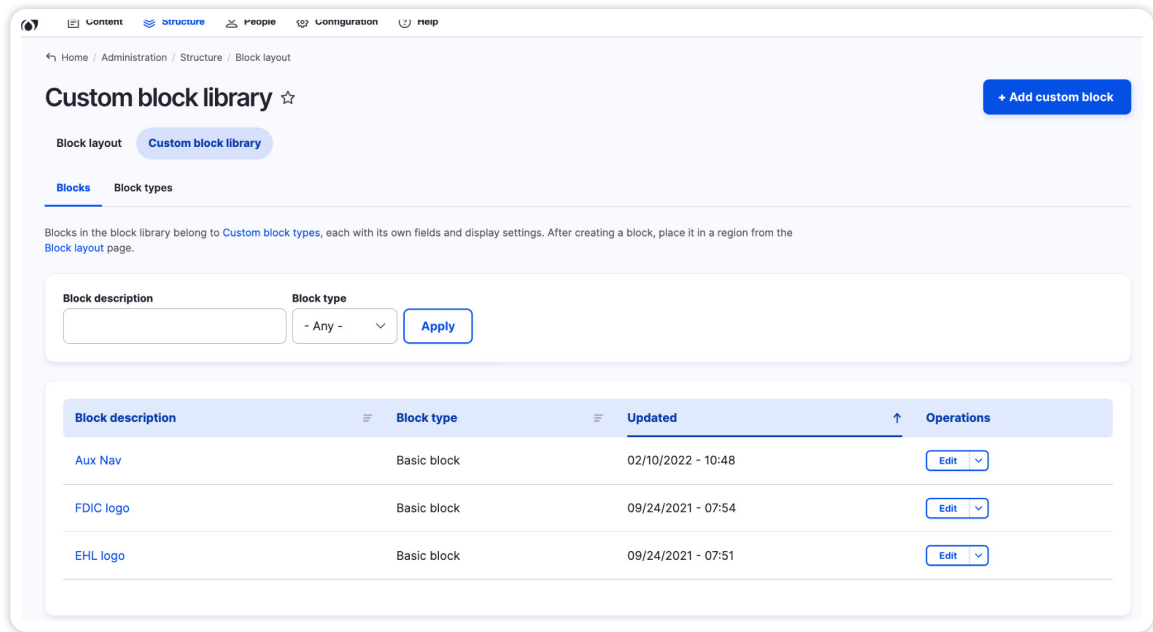
Blocks: Block types

Each block type has its own fields and display settings. Create blocks of each type on the [Blocks](#) page in the custom block library.

Block type	Description	Operations
Basic block	A basic block contains a title and a body.	Manage fields

Custom block library is where you will find all of the blocks that have been created for your site. You may edit, clone, or delete the custom blocks by clicking Edit or choosing from the dropdown on the far right column.

NOTE: If you delete a block, it cannot be retrieved and will need to be recreated.



Menus

There are several different menus that are managed in this section, including your auxiliary menu (the small menu above your main menu), your main menu, and your footer. There may be additional editable menus in this section depending on the design of your site. Further editable menus will be included in documentation specific to your financial institution.

To edit a menu on your site, start by going to “Structure” > “Menus” > “Main navigation”

← Home / Administration / Structure / Menus

Edit menu *Main navigation* ☆

[+ Add link](#)

Edit menu Clone

Title *
 Machine name: main

Administrative summary

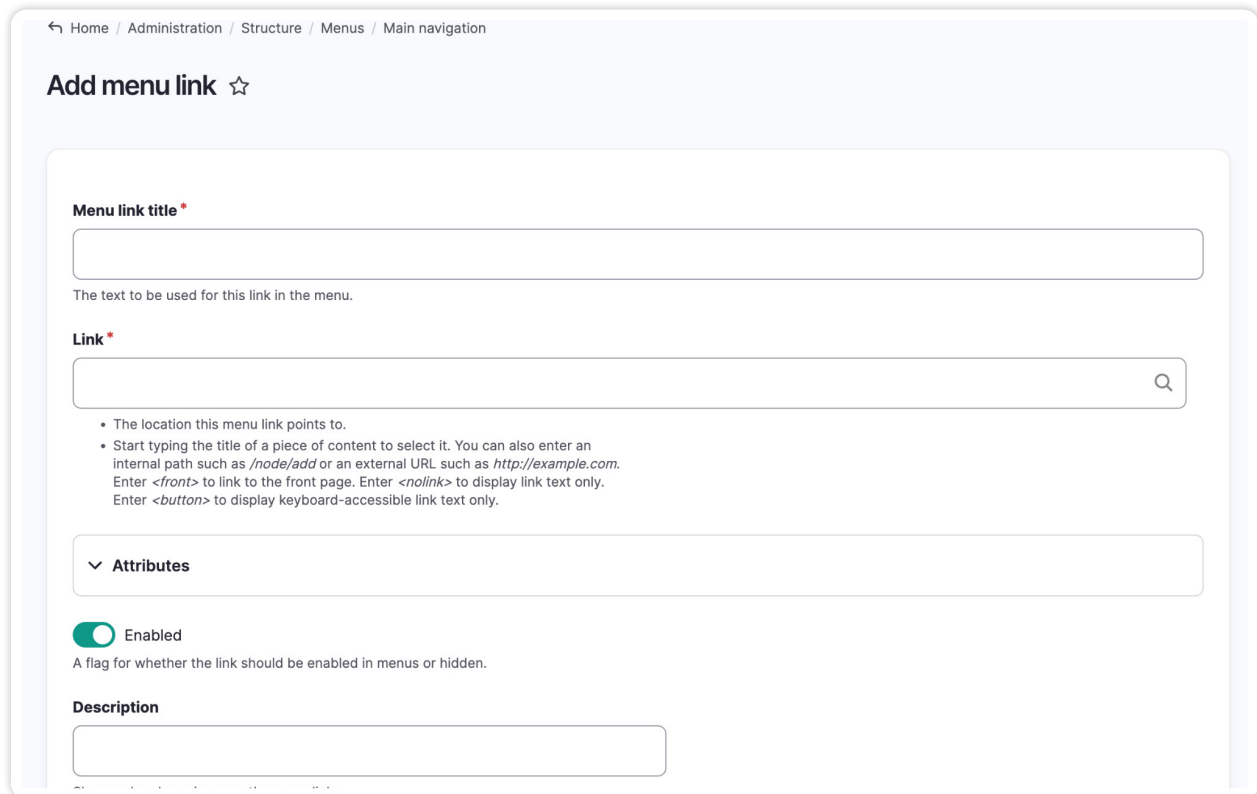
[⊞ Show row weights](#)

Menu link	Enabled	Operations
⊞ Personal	<input checked="" type="checkbox"/>	Edit ▾
⊞ Checking & Savings	<input checked="" type="checkbox"/>	Edit ▾
⊞ Certificates	<input checked="" type="checkbox"/>	Edit ▾
⊞ Youth Accounts	<input checked="" type="checkbox"/>	Edit ▾

On this screen, you can add new menu items, link new menu items to the correct page, move menu items around, and delete menu items.

To add a new menu item

1. Click the “+ Add link” button at the top right-hand corner of the page. This will take you to the “Add menu link” page. On this page, you MUST fill out the “Menu link title” field and the “Link” field.



← Home / Administration / Structure / Menus / Main navigation

Add menu link ☆

Menu link title *

The text to be used for this link in the menu.

Link *

• The location this menu link points to.
• Start typing the title of a piece of content to select it. You can also enter an internal path such as `/node/add` or an external URL such as `http://example.com`. Enter `<front>` to link to the front page. Enter `<nolink>` to display link text only. Enter `<button>` to display keyboard-accessible link text only.


▼ **Attributes**

Enabled
A flag for whether the link should be enabled in menus or hidden.

Description

2. The “Menu link title” is the name for the new page you want added to your menu. You will want to create the page BEFORE you link to it in the menu.
3. The “Link” is the URL for the new page on your site. If you click into the “Link” field and start typing the name of the page, then pages with similar names will populate. Select the correct page.
4. You can also add the page to the correct parent by clicking on the “Parent link” dropdown menu.
5. Be sure to click “Save.” This directs you back to the main menu navigation page.

On this page, you also have the ability to do the following:

- ▶ Move pages around in the navigation. This includes indenting. Should you need to move pages around in the menu, you can use the 4-way directional arrow. 
- ▶ Enable or disable pages by checking/unchecking the box in column “Enabled.”
- ▶ Delete pages from the navigation by choosing Delete from the dropdown.

NOTE: Deleting a parent item removes all its child menu items.

- ▶ Be sure to click “Save”.

Taxonomy

You will find the Taxonomy section under the Structure drop down menu.

This section allows you to add/edit/delete categories and tags associated with blog posts. If you do not have blogs on your site, then you can skip this section. If you do have blogs on your site, member module, or the product guide module, then in the Taxonomy section you will find:

- ▶ Blog Post Category
- ▶ Blog Post Tags
- ▶ Member Group
- ▶ Product Features

Blog Post Category

This area allows you to add, edit, reorganize, and unpublish categories associated with your blogs.

To add a new category, click Add term on at the top of the page. On the next page, you are required to add the name of the category. A description can be added as well. Please be sure to save.

To edit an existing category, click on “Edit” under “Operations” for the appropriate category. On the next page, you can edit the name and description of the category. Please be sure to save.

You can reorganize the categories on the main “Blog Post Category” page by using the 4-way directional arrow to drag and drop . Please be sure to save.

Blog Post Tags

This area allows you to add, edit, reorganize, and unpublish tags associated with your blogs.

To add a new tag, click on at the top right-hand corner of the page. On the next page, you are required to add the name of the tag. A description can be added as well. Please be sure to save.

To edit an existing tag, click on “Edit” under “Operations” for the appropriate tag. On the next page, you can edit the name and description of the tag. Please be sure to save.

You can reorganize the categories on the main “Blog Post Tag” page by using the 4-way directional arrow to drag and drop . Please be sure to save.

Member Group

If you have the team member module, you can create the different labels to organize your team members. The terms that you add will appear on the team member content type pages in a drop down.

← Home / Administration / Structure / Taxonomy

Member Group ☆

+ Add term

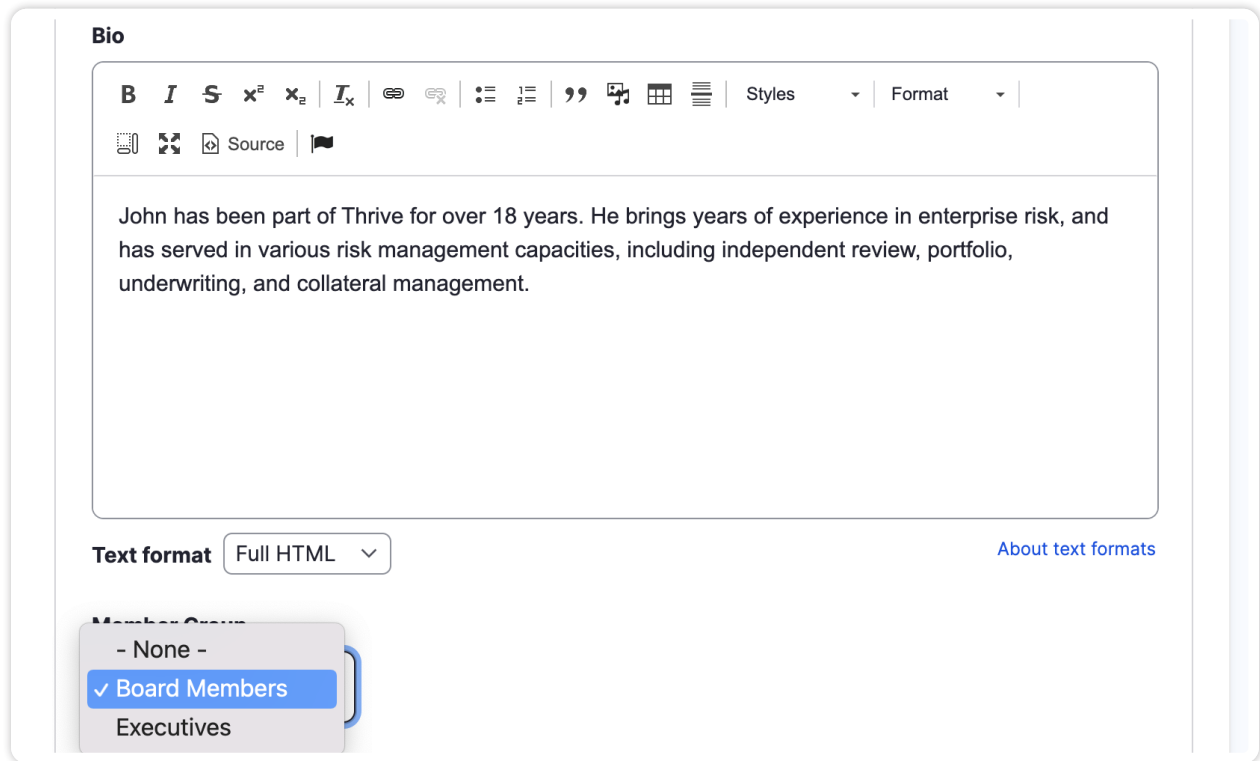
You can reorganize the terms in *Member Group* using their drag-and-drop handles, and group terms under a parent term by sliding them under and to the right of the parent.

⊞ Show row weights

Name	Operations
⊞ Board Members	Edit ▾
⊞ Executives	Edit ▾

Save Reset to alphabetical

Team member page example:



Product Features

If you have the Product Guide module on your site, the Product Features section is where you will add terms that will help steer the user to the appropriate product. Follow the steps below to configure the Product Guide.

1. Click "Add Term"
2. Add a "Name" for the feature. This is used on the backend to identify the feature.
3. Add a "Display Label" for the feature. This is displayed to end-users as answers to questions asked in Product Guide content sections. If this is left with the default value it will use the "Name" value.
4. Optionally add "Icon" for the feature. This is displayed to the end-user along with the "Display Label."

Add Products

1. Navigate to “Content” > “Add Content” > “Product”.
2. Add a “Title” for the product. This will be displayed to end-users as the name of the recommended product.
3. Add a “Product Description” for the product. This will be displayed to end-users as the description of the recommended product.
4. Add a “Product Open Button” for the product. This will be displayed to end-users as the action button below the product name and description of the recommended product.
5. Optionally add a “Product Icon” for the product. This will be displayed to end-users above the name of the recommended product.
6. Add all “Product Features” that apply to the product. This is how the guide will calculate which product to recommend.

Add Product Guides

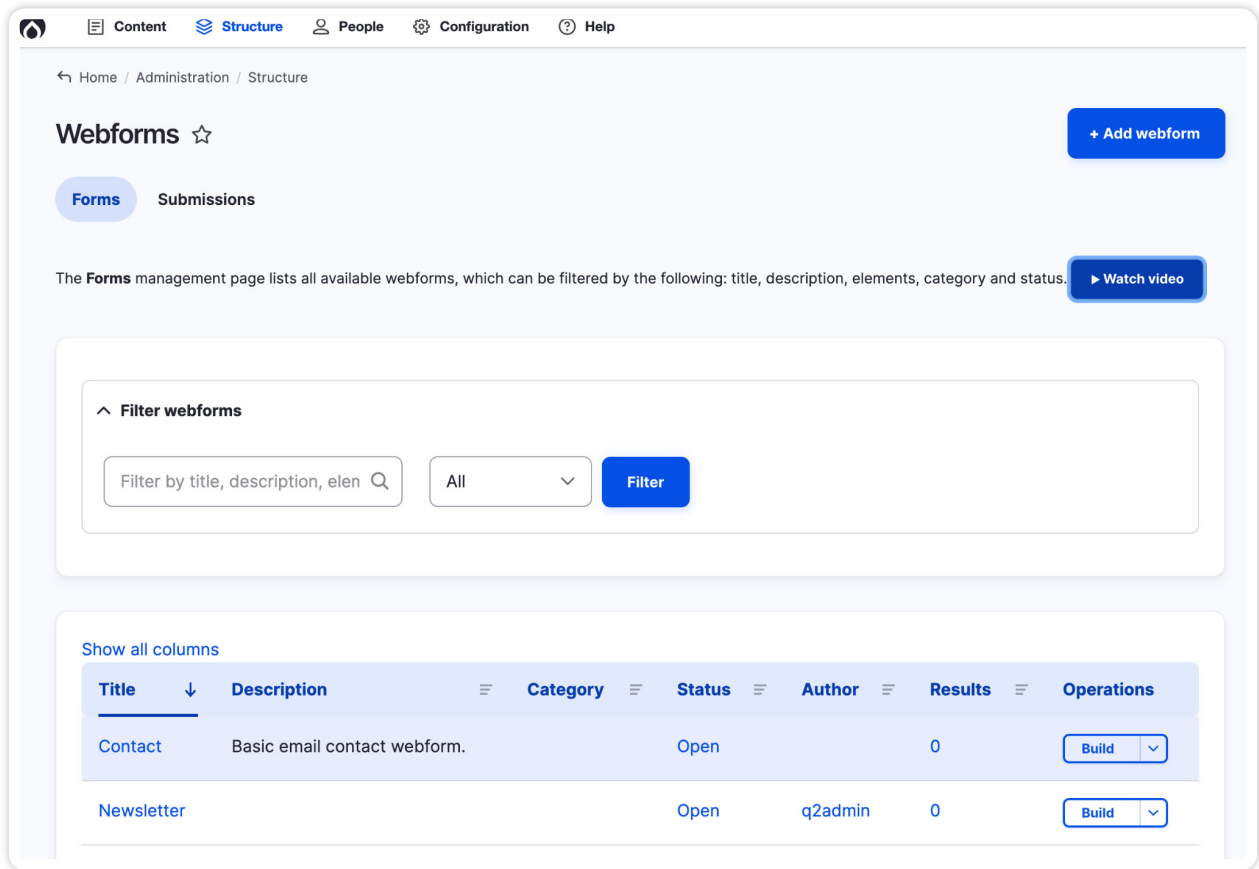
1. Navigate to the Basic Page or Landing Page that you would like to add a product guide to.
2. Click “Add Content Section”
3. Select “Product Guide”
4. Add an “Admin Title” to the section.
5. Add any “Required Features” for the guide. This tells the guide to return products with the required feature above other products regardless of which product scores higher. A good example for this is “Checking” or “Savings” features. If you are placing a guide on a checking page you would want to add “Checking” as a required feature so that checking products are always recommended highest regardless of whether a given savings account may have more matching features.
6. Create the call to action by filling out the fields in the “Product Guide Call To Action” fieldset. This is the content that will display for end-users who have not completed the guide and should entice them into using the guide.
 - A. Add “Call to Action Text” for the guide. This is the content that will display for end-users who have not completed the guide and should entice them into using the guide.
 - B. Add “Button Text” for the guide. This is the text that displays on the button that begins the product guide for the end-user.

7. Add “Product Guide Slides” for the guide. These are the slides that consist of a question and available answers that will ultimately determine the score by which products are recommended.
 - A. Add the “Question” for the slide. This is the question displayed on this slide to the end-user.
 - B. Optionally check that this question is a “Required answer match” question. This indicates that the answer selected for this slide is a required feature. The guide will return products with this feature above other products regardless of which product scores a higher match score.
 - C. Optionally select whether this question should “Allow multiple answers to be selected”. This allows end-users to select more than one of the provided answers for this slide.
 - D. Select the “Feature Layout”. This determines how the answers are laid out for end-users. “Rows of wide buttons” is the default layout.
 - E. Add all product features that you want available as “Answers” for the slide. These are the product features that were created as the first step of configuring the Product Guide. When an end-user selects an “Answer” (product feature) that matches a product, that product’s score is increased making it more likely that the product will be returned as the recommended product.

Repeat as necessary to add the desired slides and save the content node.

Webforms

This area of your website will show you the list of webforms on your site, as well as form submissions.



The screenshot shows the Drupal administration interface for Webforms. At the top, there are navigation links for Content, Structure, People, Configuration, and Help. Below this, the breadcrumb trail is Home / Administration / Structure. The main heading is "Webforms" with a star icon and a "+ Add webform" button. There are two tabs: "Forms" (selected) and "Submissions". A text block states: "The **Forms** management page lists all available webforms, which can be filtered by the following: title, description, elements, category and status." with a "Watch video" button. Below this is a "Filter webforms" section with a search input (containing "Filter by title, description, elen"), a dropdown menu (set to "All"), and a "Filter" button. At the bottom, there is a table with columns: Title, Description, Category, Status, Author, Results, and Operations. The table lists two webforms: "Contact" and "Newsletter".

Title	Description	Category	Status	Author	Results	Operations
Contact	Basic email contact webform.		Open		0	Build
Newsletter			Open	q2admin	0	Build

Forms

To view the list of web forms built on your site, go to “Structure” > “Webforms” > “Forms”

NOTE: The development/editing of forms on Canvas/Drupal 9 is complex. Prior to creating a new form or editing an existing form, please contact Trabian for instruction.

Custom Tokens

Tokens are a great way to add a content item that appears in several places on your site. This

could be a small piece of content, like a rate, or a larger piece of content, like a disclosure or a table. When you update the token in the backend of the CMS, it updates everywhere the token exists on the website.

NOTE: You must create tokens BEFORE adding them to a content page.

To create a new token on your site, please follow the below steps:

1. Navigate to “Custom Tokens” under the “Structure” main nav
2. Once on this page, click on “Add token”
3. Once on the editing page, you will need to fill out the information. Be mindful of formatting.

Add custom token ☆

Token type
A Custom ▾
The token type determines the availability of the token according to the data in the \$data array (ex. a token of type rate will need \$data[rate]).

Name *
B Administrative name.

Machine name ID *
C A unique machine-readable name for this token. It must only contain lowercase letters, numbers, and underscores.

Description
D Description.

Content *
E [Rich text editor toolbar]
 Format ▾ [Full HTML] [Source]

F Text format ▾ Full HTML [About text format](#)
The content that will replace this token.

G Save

Token type (A) – While this is not showing as a required field, you must fill it out. Select the most appropriate option. Examples include rates, phone, and custom.

Token name (B) – This is a required field. It should be short and to the point. For example, “Home Loan”.

Machine name ID (C) – This is a required field. This is a unique machine-readable name for the new token. It must contain lowercase letters, numbers, and underscores. For example, “home_loan”

Token description (D) – Typically, this is the same as the Token name. For example, “Home Loan.”

Content (E) – Add the content that you want pulled in when the token is referenced in the content. For example, if this is a non-API rate, then 2.95. Be sure to include EXACTLY what you want pulled in.

4. Be sure to update the **Text format dropdown (F)** to “Full HTML”.
5. Scroll to the bottom of the page and **Save(G)**.

Once you have a token set up, then you can add it to the page. You can also use the token tool in the CKEditor.

NOTE: FORMATTING IS VERY IMPORTANT! When adding a token to a page, use this format “[Token Type: Machine Name]”. Per the example noted above, you would need to add [rates:home_loan] to the pages that require the home loan rate token.

People

You can find the “People” drop-down on the top of the page. This section of the site allows you to manage the users on your website. This includes adding new users, editing users, and blocking users that are no longer at your financial institution.

Additionally, if you are experiencing issues with IPs getting blocked or if a user has been locked out because of too many incorrect login attempts, you can click on “Flood Unblock” and this will unblock your Canvas users.

As a reminder, below are the user roles built for your website:

Content Admin – Can add additional users to the Canvas site, can view and edit content within the Canvas site. This role includes all the rights of a Content Manager and a Form Manager.

Content Manager – Can view and edit content, including forms, but CANNOT add/edit users within Canvas. This role includes all the rights of a Form Manager.

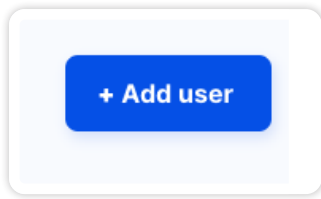
Content Viewer – Can only view the content, including forms and cannot add additional users or edit content within Canvas.

Form Manager – Can view all content within Canvas, and can only make content edits to forms, as well as process form submittals. Anyone receiving the email submittals, that is not already set up as a Content Admin or Content Manager, must be set up as a Form Manager to process form submittals.

NOTE: If additional role types are needed, please submit a request with details of permissions/access settings. A new role type will be an additional cost.

To create a user:

1. Click the “+ Add user” button at the top of the page.



2. Fill out the required fields and click “Create new account.”

To edit an existing user:

1. Find the correct username on the People page and click on “Edit” under “Operation.”
2. Make appropriate adjustments and click “Save.”

To remove access to site for a user:

We do not recommend deleting a user as any content associated with this person is tied to his/her name. Deleting a user will update his/her name to “Anonymous.” Auditors tend to not like to see “Anonymous” users on a website.

1. To remove access to a user, find the correct username on the People page and click on “Edit” under “Operation.”
2. On the next page, update the “Status” from “Active” to “Blocked.”

Username *

meredith

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password

To change the current user password, enter the new password in both fields.

Status

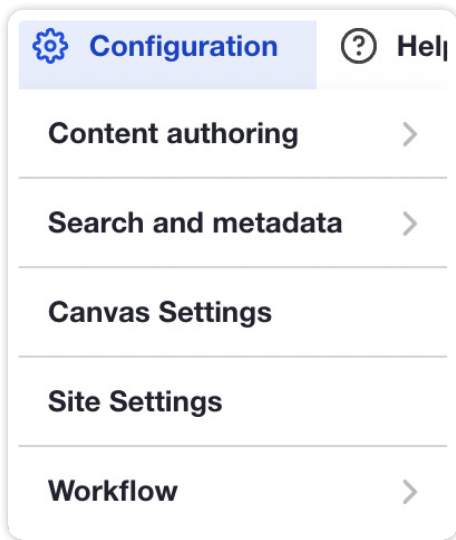
Blocked

Active

Policy	Status
Default Policy	Fail - Password length must be at least 8 characters.
Default Policy	Pass
Default Policy	Fail - Password must contain at least 1 lowercase chara
Default Policy	Fail - Password must contain at least 1 numeric charact
Default Policy	Fail - Password must contain at least 1 uppercase chara

3. Scroll to the bottom and save.

Configuration



You can find the “configuration” drop-down on the top of the page. Configuration provides the ability to access editing URL Aliases, URL Redirects, as well as Social Media links.

Content Authoring

Scheduler: *We advise you to not edit this section.*

Search and Metadata

URL Aliases

URL aliases allow you to add custom URLs to an existing page.

^ URL redirects

From

No URL redirects available.

[Add URL redirect](#)

^ URL alias

Automatic alias

Generate automatic URL alias
Uncheck this to create a custom alias below.

URL alias

Specify an alternative path by which this data can be accessed. For example, type "/about" when writing an about page.

URL Redirects

Redirects are automatically created when you change the name of a page.

NOTE: When you change the name of your page, it automatically creates a redirect to ensure users are going to the right page.

Edit URL redirect ☆

Path*

https://template1.dev.trabian.site/

To*

Start typing the title of a piece of content to select it. You can also enter an internal path such as `/node/add` or an external URL such as `http://example.com`. Enter `<front>` to link to the front page. Enter `<nolink>` to display link text only. Enter `<button>` to display keyboard-accessible link text only.

Redirect status

▾

You can find more information about HTTP redirect status codes at http://en.wikipedia.org/wiki/List_of_HTTP_status_codes#3xx_Redirection.

NOTE: Each page has a “node” assigned to it so that any time the page name is changed, the entity reference remains intact.

Canvas Settings

This section is not available for editing.

Site Settings

Use this area to manage your social media URLs and Google Analytics tracking codes.

Social Media Icons

For the social media icons, if you enter a URL, it will print the associated social media logo.

Analytics/Tracking Snippets

In the Analytics/Tracking Snippets tab, you can add the following:

Google Search Console site verification code. Copy and paste the “content” attribute of the Google Search Console site verification meta tag here. To find the site verification meta tag, go to the “Alternate methods” tab in the Google Search Console interface and select “HTML tag.”

Analytics/tracking Snippets are

- A. Code fields that can print right before the closing head tag (this is where Google Analytics, Facebook Pixels, and other 3rd party “script” code typically goes)
- B. Right after the OPENING body tag (this is where Google Tag Manager “noscript” code typically goes), and
- C. Right before the CLOSING body tag (this is where Google Tag Manager code typically goes). Be sure and select the “Source” view circled below to paste in the code snippet for it to work properly.

Add analytics / tracking code to the tag.

B I S x² x₂ I_x | [Link] [Image] [List] [Table] [Quote] [Code] [Source] | [Save]

A

Text format Full HTML ▾

Add analytics / tracking code snippets that need to be placed right before the closing head tag here. This is where Google Analytics code typically goes.

Add analytics / tracking code after the OPENING tag.

B I S x² x₂ I_x | [Link] [Image] [List] [Table] [Quote] [Code] [Source] | [Save]

B

Text format Full HTML ▾

Add analytics / tracking code snippets that need to be placed right after the OPENING body tag here. This is where Google Tag Manager code typically goes.

Add analytics / tracking code before the CLOSING tag.

B I S x² x₂ I_x | [Link] [Image] [List] [Table] [Quote] [Code] [Source] | [Save]

C

After adding the snippet, ensure that you click save.

Workflow

Scheduled Transition Settings

We recommend not editing most of these settings, but if you want to you can disable the use of Scheduled Transitions on certain content types. Be sure to scroll to the bottom and hit “Save configuration.”

← Back to site | Administration / Configuration / Workflow

Scheduled transitions settings ☆

^ Enabled types (11)

Enable entity type/bundles for use with scheduled transitions.

<input checked="" type="checkbox"/> Entity type	Bundle
<input checked="" type="checkbox"/> Content	Alert
<input checked="" type="checkbox"/> Content	Blog Post
<input checked="" type="checkbox"/> Content	Event
<input checked="" type="checkbox"/> Content	Landing page
<input checked="" type="checkbox"/> Content	Location
<input checked="" type="checkbox"/> Content	Basic page
<input checked="" type="checkbox"/> Content	Product
<input checked="" type="checkbox"/> Content	Dynamic Banner
<input checked="" type="checkbox"/> Content	Gallery
<input checked="" type="checkbox"/> Content	Team Member
<input checked="" type="checkbox"/> Content	Webform

External Link Alerts

You can alert users that they are exiting your site and visiting another site. Simply visit Configuration > Canvas Settings > External Link Settings in your menu.

NOTE: This section is only accessible to Content Admins.

The screenshot shows the 'Edit config page External Links' configuration page. It is divided into two main sections: 'Global Defaults' and 'Warning Message'.

Global Defaults: This section contains a 'Global Defaults' header and a 'Warning Message' field. The 'Warning Message' field is currently empty. Below this, there are two sections for 'Warning Message' with a 'Warning: You Are Leaving This Site.' message. The first section has a 'Warning Message' field with the text 'You are about to leave this site. If you click on the link below, you will be leaving this site.' and a 'Save Changes' button. The second section has a 'Warning Message' field with the text 'You are about to leave this site. If you click on the link below, you will be leaving this site.' and a 'Save Changes' button.

Warning Message: This section contains a 'Warning Message' field with the text 'Warning: You Are Leaving This Site.' and a 'Save Changes' button. Below this, there are two sections for 'Warning Message' with a 'Warning: You Are Leaving This Site.' message. The first section has a 'Warning Message' field with the text 'You are about to leave this site. If you click on the link below, you will be leaving this site.' and a 'Save Changes' button. The second section has a 'Warning Message' field with the text 'You are about to leave this site. If you click on the link below, you will be leaving this site.' and a 'Save Changes' button.

Enable/Disable

Disable external link “speed bumps” by clicking this toggle. Turn them back on by unclicking the toggle.

Whitelisted Domains

Add domains that you do not want to trigger the “speed bump” interaction. For example: if you have a separate site/domain for careers, you can add that URL here to keep users from seeing the “You are leaving...” prompt.

NOTE: The domain evaluation will honor specificity, so only be as specific as necessary. For example, if you want all links to example.com to be white listed (including www.example.com) use the more broad example.com and all subdomains will be whitelisted as well. However, if you are more specific and white list www.example.com, only links specifically targeting the www version of example.com will be whitelisted while links targeting the non-www version will not be whitelisted.

Warning Message

Use this area to edit the warning message that is displayed in the modal when an external link is click.

NOTE: There must be a span around the link with the class **q2-external-link-url**. The continue button must have the class **q2-external-link-continue**, but can have other classes as well. The cancel button must have the class **q2-external-link-cancel**, but can have other classes as well.

Help: More Information About Your Installed Modules

This is the help section where you can learn more about the Drupal CMS. There are also Module Overviews which help explain more about the different modules that give special functionality to your website.

Chapter Three

Editing Your Website

In this section:

Creating a New Page

Content Areas

Grids

Publishing

Revisions

Editing Your Website

Creating a New Page (Basic or Landing)

Basic and landing pages make up your website. In most cases, internal content is made up of primarily basic pages. Landing pages are typically used for homepage content and, in some cases, internal pages.

The basic page content type can include a sidebar and content sections based on your original design. It also includes a static banner (recommend size 1600x300 and less than 1MB in weight).

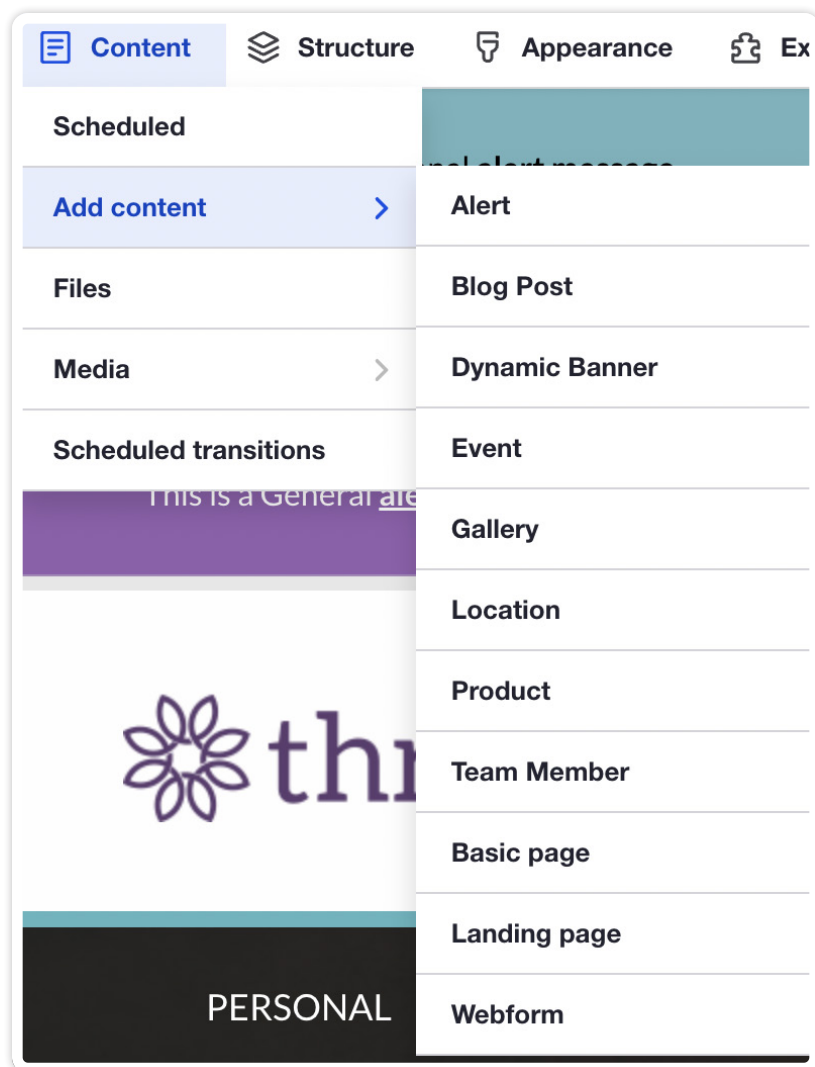
The landing page content type typically includes banners and is full width (recommend size 1600 x 600 and less than 1MB in weight). It does not include a sidebar. Content sections will be included per your approved design. Landing pages can be used for internal pages as well.

To create a new page, first you need to select a content type.

NOTE: your site may not have all these content type options.

- ▶ Alert
- ▶ Blog Post
- ▶ Basic Page
- ▶ Event
- ▶ Image Gallery
- ▶ Landing Page
- ▶ Web Form

To see the content type options on your site, go to “Content” > “Add content”

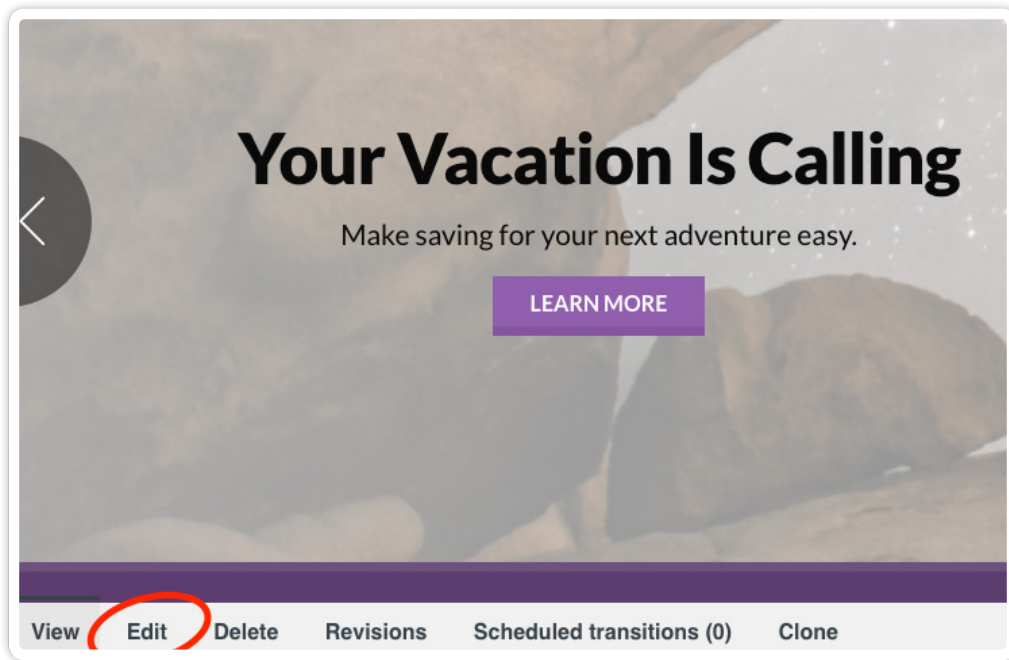


To create a new basic or landing page, select the appropriate content type and add in the basic information for the page, including the title and, if requested, the subtitle.

The following information is pertinent to editing both your home page and internal pages. There are only a few differences between the two page content types:

Home Page

Your home page is built on a content type called a “Landing Page.” This content type is typically used just for the home page but can be used on internal pages on your site. You can edit the home page by either navigating to it and clicking on “Edit” at the bottom of your screen:



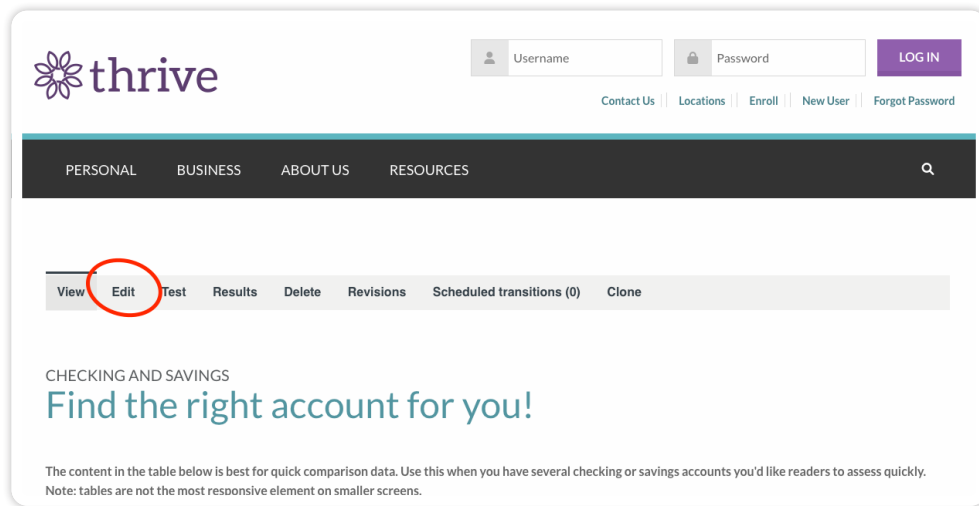
Or by going to the “Content” section and filtering by “Content type” = landing page.

1. Find the home page usually called “Home” or “Main Landing”
2. Click “Edit” under “Operations.”

Home page content is typically broken into 2 areas: “Banner Content” and “Content Sections.” You might have additional areas. If so, then those areas will be covered in a document specific to your financial institution.

Internal Pages

Your internal pages are built on a content type called a “Basic Page.” This content type is incredibly flexible and can be used for most of the pages on your site. You can edit an internal page by either navigation to it from the front-end navigation and clicking on “Edit” at the top of the screen:



1. Or by going to the “Content” tab and searching for part of the page title. Additionally, you can filter by “Basic Page” content type.
2. Click “Edit” under “Operations.”

Content Editing Via the Front End of the Site

Once you are logged in you should see an edit menu on the bottom of the page for Landing Pages and just below the main navigation on Basic Pages.

Click Edit on either menu to edit the page.

Landing Page



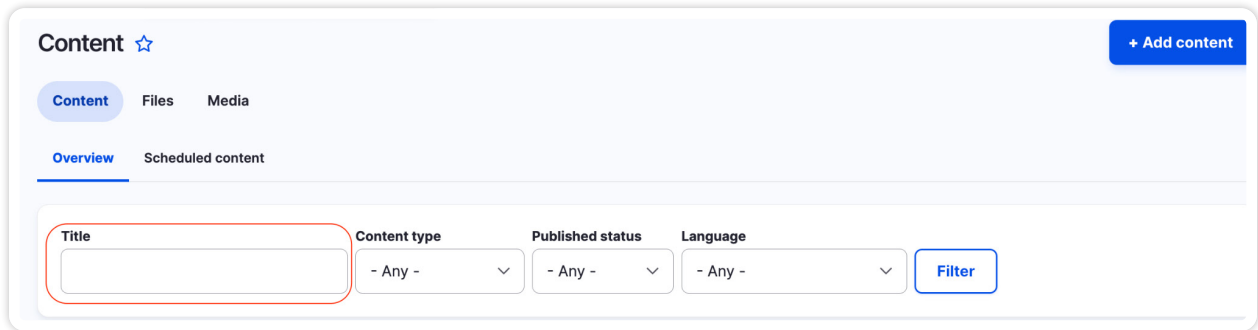
Basic Page



Content Editing Via the Back End of the Site

Click on Content in the navigation to see a full listing of pages on your site.

You may search for the title of the page at the top of the page before the listing of pages.

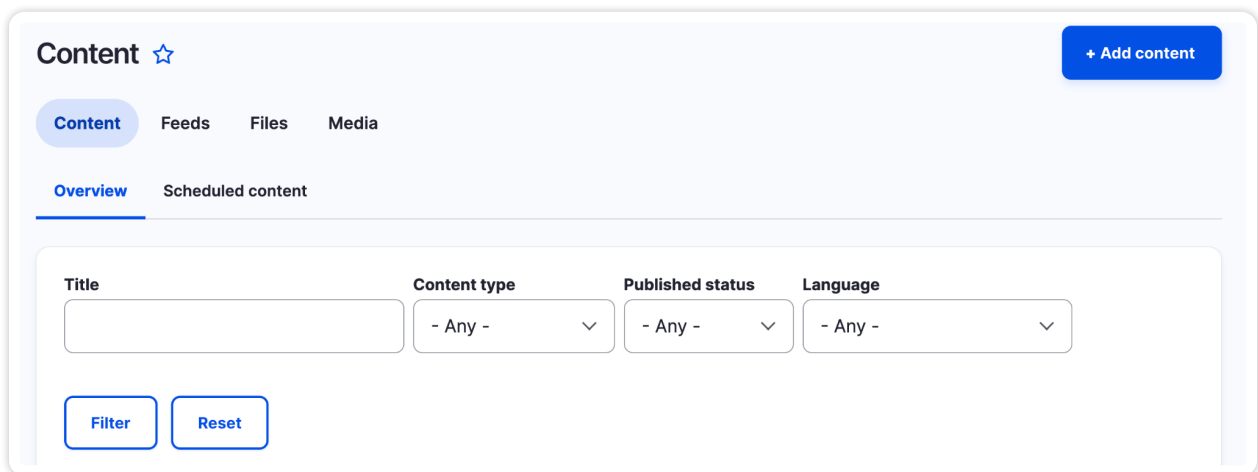


Below the search, the Content page list shows all of the published and unpublished content within your website. You are able to find whether they are published or unpublished under the Status section.

Show all columns



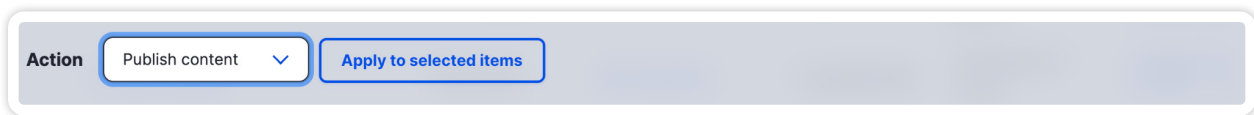
You are also able to search the content section by Language, Published status, Content type and Title as shown below.



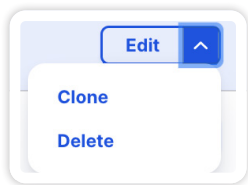
You are able to publish or unpublish multiple pages at a time.

To publish or unpublish multiple pages:

1. Select the pages you choose to publish / unpublish
2. Choose a selected action
3. Click Apply to selected items on the bar that pops up from the bottom of the page.



For each row under the In the Operations column, you are able to edit, delete, or clone the row that you have selected.



Edit will take you to the Edit interface for that specific page.

Scheduled Transitions will take you to the list of any scheduled transitions you have for that page.

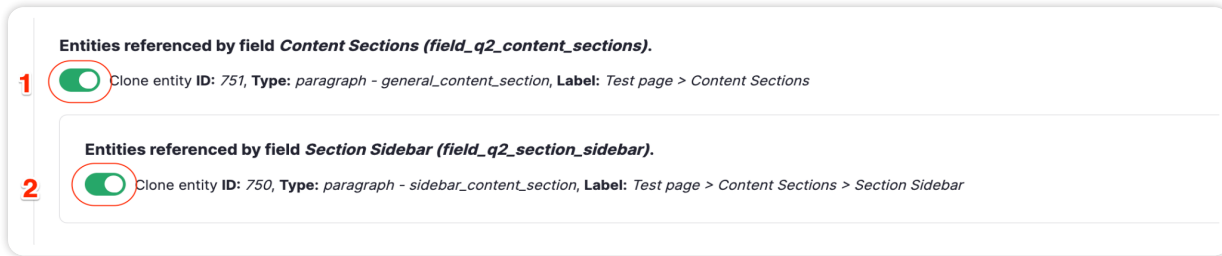
Clone: Upon selecting the clone option, you will be taken to the Clone page where you will have the ability to make a copy of the selected clone.

NOTE: We recommend that you only clone a page that has a very similar layout and content to the new page you are creating. If you are only looking to use one small section of the page, we recommend creating this page from scratch vs. cloning a page with more content than is necessary.

How to clone a page

Either on the content list page or on the page itself, choose “Clone.”

On the clone interface page, there will be toggles for each piece of content on the page. If you want the content you are cloning to stay the same as the original content, the toggle should be gray.



After you’ve made your selections on which content needs to sync with original content, click “Clone” at the bottom of the page.

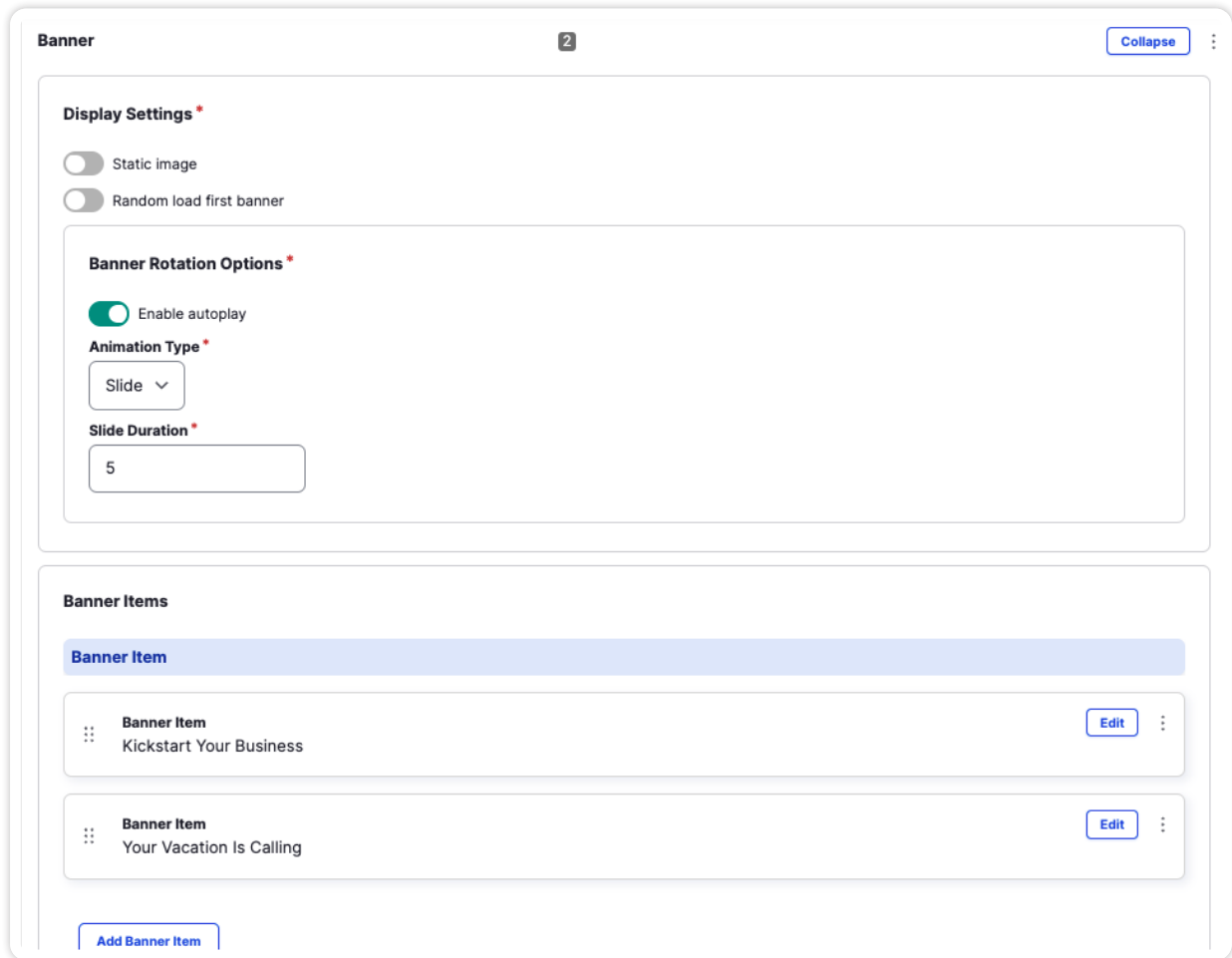
NOTE: All toggles will be set to green by default, which would make the clone a standalone piece of content.

Click “Delete” if you want to remove the page permanently from your site. Clicking Delete will take you to a confirmation page.

NOTE: The delete action can NOT be undone. We recommend unpublishing instead of deleting content.

Banner Content Area

The homepage banner content area on your site will look like this:



Under **Display Settings**, you will be able to choose whether you want the banner to display as a static image or random load first banner. If neither are toggled (green) and Enable autoplay is toggled (green), it will rotate through the published banners.

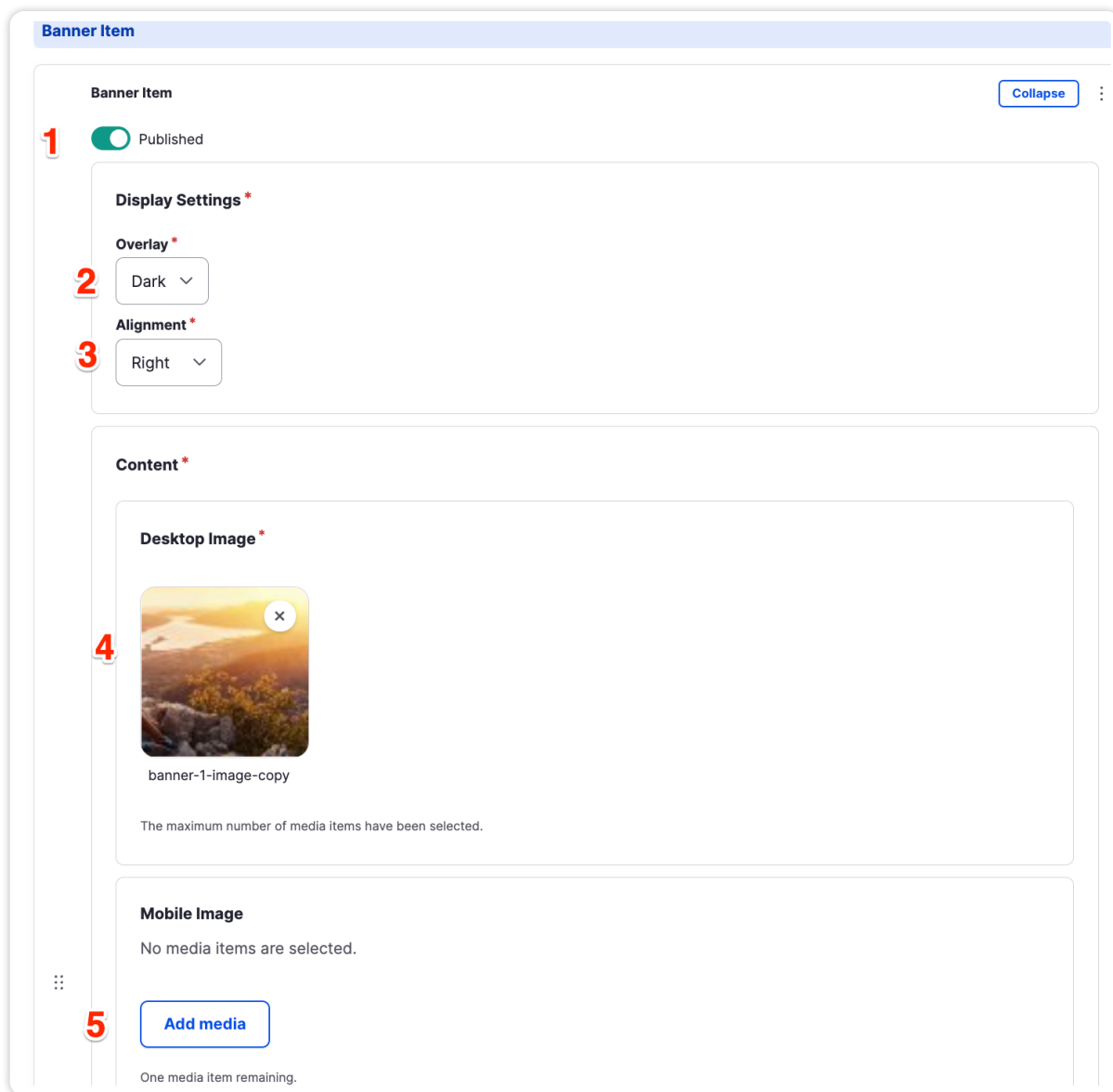
You may choose the animation type on the dropdown, slide or fade.

You may choose how many seconds the banner will appear before moving to the next.

Banner Items will show the banners you have available.

Click “Edit” on the far right side of the Banner item to edit/view the item.

Once expanded, you can configure the following:



1. Choose whether the banner item is published.
2. Type of overlay, Dark or Light. You may choose the overlay that will allow the most contrast between the text and the background image. For example, if the overlay is dark, the banner text will be light.

3. Where you would like the content to appear on the image. Under Alignment, you have the options of left, right, and center.
4. Upload or choose an image from the media library for your banner.
5. Upload or choose an image for the mobile view for your banner. Note that this is optional; when uploading an image, you are given the option to choose a focal point on the image that it will scale down to on smaller screens. Because this isn't exact, you have the option to add a mobile-specific image.

Below the mobile image, you can add/edit content your banner content.

1. **Title.** This is the larger text or headline of the banner.
2. **Body copy.** The smaller text that appears on the banner.
3. **Button URL.** This is the page or URL that you are linking to.
4. **Link text.** This is what will appear in the button of the banner.
5. **Button Aria Label.** This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”
6. If you hover over the six dots on other banners, you may drag and drop them to update the order of the banners.
7. Click **Add Banner Item** to add another banner item.

The screenshot shows a banner editor interface. At the top, there is a 'Title' field containing 'Kickstart Your Business' (callout 1). Below it is a 'Body' field containing 'Earn up to a \$400 bonus when you open a business checking or savings account. Offer valid through June 2022.' (callout 2). The 'Button' section (callout 3) includes a 'URL' field with a '#' character and a search icon, with a tooltip providing instructions on how to use internal paths, external URLs, and special characters like <front>, <nolink>, and <button>. Below the URL field is a 'Link text' field containing 'Investments' (callout 4). Underneath is a 'Button Aria Label' field containing 'Lorem ipsum aria label' (callout 5). At the bottom of the editor, there is a list of banner items (callout 6) with a 'Banner Item' titled 'Your Vacation Is Calling' and an 'Edit' button. Finally, there is an 'Add Banner Item' button (callout 7) at the bottom left.

Content Sections

The content section includes all the paragraph styles (e.g., grid, accordions) you can add to your landing page or basic page. The difference between landing page and basic page content sections is that landing pages go full width while basic pages are fixed width and may enable a sidebar.

Things to keep in mind:

- ▶ Each paragraph style is preconfigured to display content in a specific manner.
- ▶ It is possible to unpublish content and later publish it again. This is an alternative to deleting content on your page.
- ▶ Content sections can be reordered by dragging and dropping.

Adding New Content Sections

To add a content section, click “Add Content Section” at the bottom of the Edit page.

A blue rectangular button with rounded corners and a thin blue border. The text "Add Content Section" is centered in blue.

to *Content Sections*

Choose the Content Section you want to add (depending on the functionality on your site, you may not have some of the modules/content sections enabled on your site). Content sections include the following:

Grid

This is a very flexible content type that provides you the following options:

- ▶ 2 to 4 columns
- ▶ Ability to select between columns, cards, and callouts
- ▶ Ability to add images, icons, or have no image

Grid examples

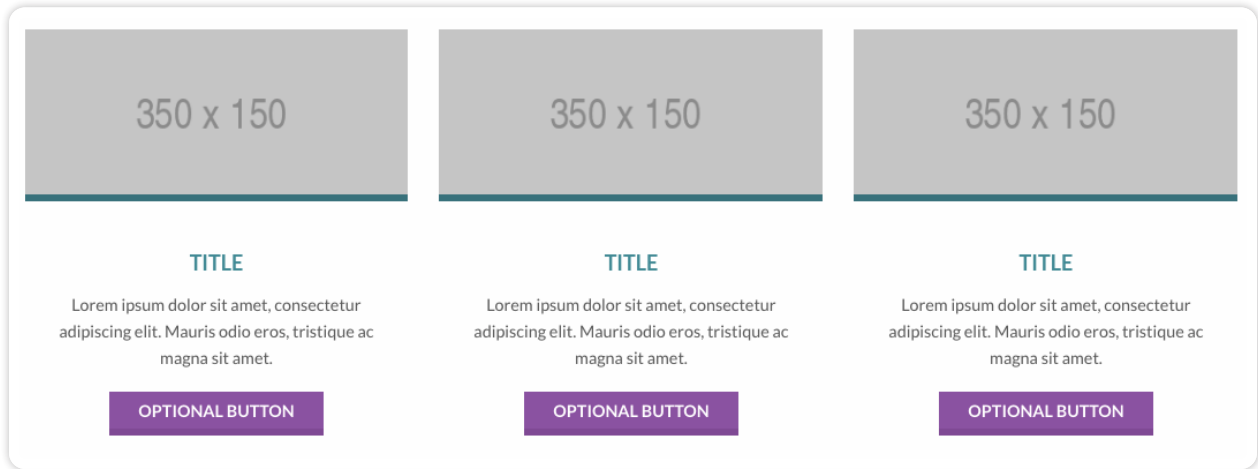
COLUMNS

Variable width columns (2-4 columns) with optional image above content and optional button/link below the content.



CALLOUTS

Variable width “callouts” (2-4 callouts) with optional icon/image above content, callout title, and optional button/link below content.



CARDS

Grid of “cards” (2-4 callouts) with optional icon/image above content, callout title, and optional button/link below content.



Grid Steps

Grid 4 [Preview](#) [Collapse](#)

Published

Admin Title*

Callout Section

Display admin title

Background Color

Grey ▾

This option sets a background color for the entire section.

Section Gutter(s)*

Top & Bottom ▾

This option changes where extra space will be printed around the section.

Display Settings*

Number of Columns*

3 Columns ▾

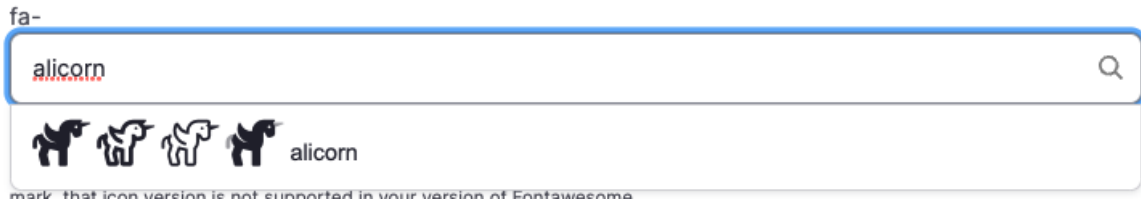
Grid Style*

Callouts ▾

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. **Choose your Display Settings** – You can choose:
 - A. **Number of Columns** – Grids can be broken into two, three, and four columns.
 - B. **Grid Style** – Choose from Cards, Callouts or Columns (see the examples in the “Grid Examples” Section for a rundown of the differences).
5. **Enter a Grid Item** – You may now begin to add items to your grid. For each grid item, you will need to enter the following pieces of information.
 - A. **Image Type** – You will have the ability to select “None”, “Font Awesome,” or “Image” for grid items.

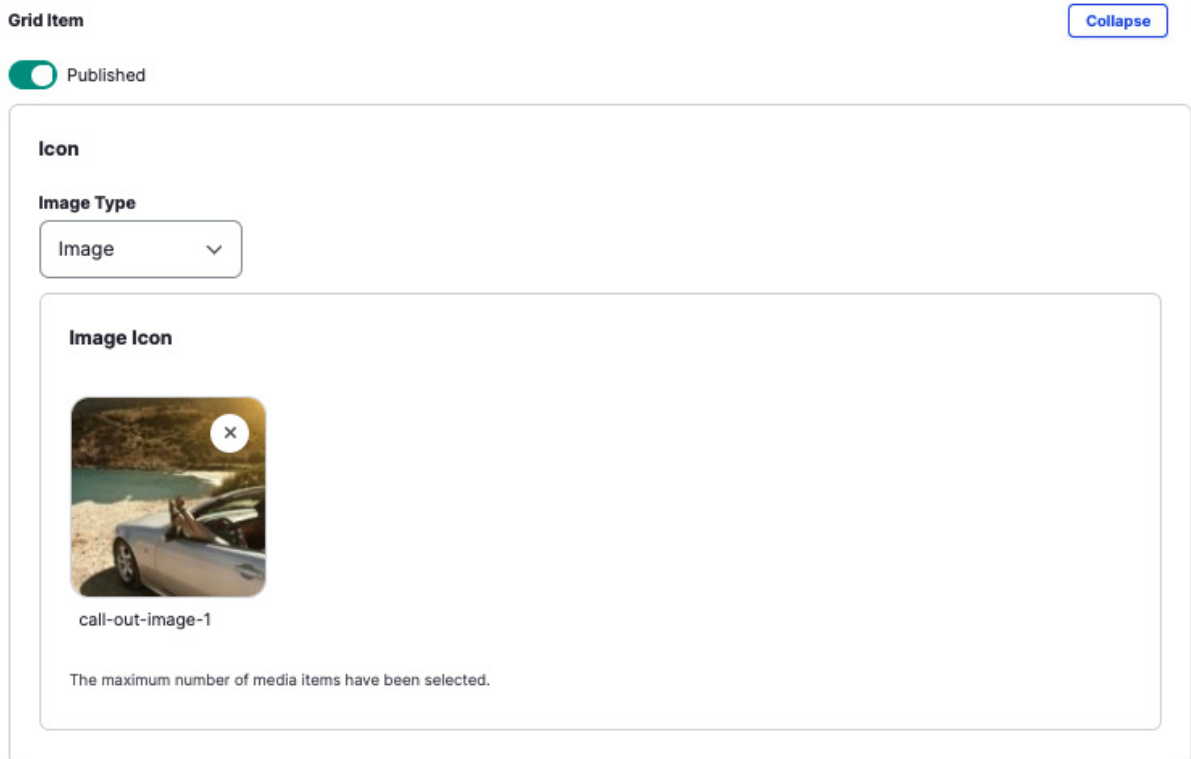
- Choose “None” if you do not want an icon or image at the top of your grid item.
- **Font Awesome** – Under Image Type dropdown, choose Font Awesome. Under Font Awesome Icon fa- field, start typing the icon you would like to add and will appear.

Font Awesome Icon



Click on the icon and you may continue adding content for this section

- **Image** – Once you choose image, you can click “Add Media.” Here you can upload an image from your computer or choose one from the library. Once uploaded, you will see a thumbnail of your image. You may continue adding content for this section.



B. **Title** – This will be the content that will appear at the top of the grid item.

C. **Content** – This is the content that will appear below the title.

D. **Button**

- **Button URL** – This is the page or URL that you are linking to.
- **Link text** – This is what will appear in the button.
- **Button Aria Label** – This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”

E. **Click Add Grid Item** again and follow the steps above until you have added all the needed grid items.

F. If you need to delete a grid item, click the three dots at the top of the grid item. You can always hide a Grid OR a Grid Item by clicking the “Published” toggle.



Accordions / Tabs

This paragraph style allows you to select between accordions and vertical/horizontal tabs. Things to keep in mind when selecting this content type:

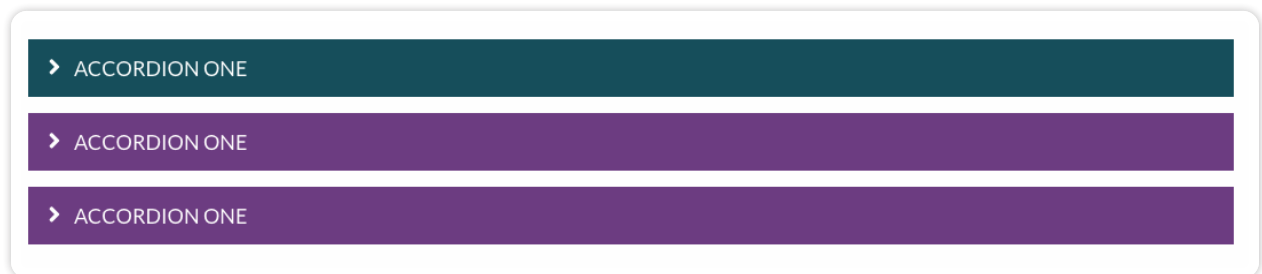
Accordions will ALWAYS have the first accordion set to open.

Horizontal tabs should be minimized to no more than three or four across as they will eventually wrap.

Accordion / Tab examples

ACCORDIONS

Full-width accordions (max 10) containing standard text content, created using a WYSIWYG editor.



TABS

Full-width tabbed content (max 5) with optional horizontal or vertical orientation, containing standard text created using a WYSIWYG editor.

Tab One	Tab Two	Tab Three
<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis eu augue leo. Proin posuere et magna ut dapibus. Morbi quis ipsum tellus. Proin nec turpis tortor. Sed non mollis dolor. Praesent tincidunt euismod lorem, placerat pharetra eros faucibus ac. Etiam eu laoreet tellus. Praesent lacinia, ligula ac vehicula tincidunt, ipsum lacus dictum sem, sit amet dignissim urna erat vitae nulla. Nulla facilisi. Ut consequat lacus vitae nisi volutpat aliquet. Maecenas est libero, euismod id urna at, facilisis sodales nunc.</p> <p>Sed vel orci et leo fermentum elementum in ut lectus. Morbi interdum consectetur lectus non maximus. Integer ornare felis a mollis aliquam. Etiam placerat mauris a viverra venenatis. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ex elit, tincidunt ac bibendum maximus, pellentesque in diam. Vestibulum ornare, felis sed auctor rhoncus, purus odio facilisis est, vel posuere leo magna vitae nunc. Donec eget est in ex sodales ultricies. Nulla convallis pellentesque ipsum non feugiat. Phasellus sodales eleifend mattis. Donec et hendrerit arcu. Mauris venenatis condimentum massa, nec molestie elit euismod at. Nullam in aliquet ex. Aenean non quam quam. Mauris sodales vestibulum enim, in egestas odio sollicitudin vitae.</p> <p>Donec ultrices fermentum neque. Nunc nisi velit, tincidunt vel cursus in, fermentum id nisi. Sed aliquet nisi finibus neque feugiat luctus. Aliquam volutpat rhoncus convallis. Morbi nec ante in libero dictum facilisis id eu purus. Donec a commodo nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Morbi interdum nulla eget arcu tincidunt placerat. Donec ac aliquet sapien. Praesent condimentum laoreet imperdiet. Aenean sed fringilla velit, eu finibus sem. Etiam fringilla ipsum magna, in lobortis felis consectetur vitae.</p>		

Tab One	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis eu augue leo. Proin posuere et magna ut dapibus. Morbi quis ipsum tellus. Proin nec turpis tortor. Sed non mollis dolor. Praesent tincidunt euismod lorem, placerat pharetra eros faucibus ac. Etiam eu laoreet tellus. Praesent lacinia, ligula ac vehicula tincidunt, ipsum lacus dictum sem, sit amet dignissim urna erat vitae nulla. Nulla facilisi. Ut consequat lacus vitae nisi volutpat aliquet. Maecenas est libero, euismod id urna at, facilisis sodales nunc.
Tab Two	Sed vel orci et leo fermentum elementum in ut lectus. Morbi interdum consectetur lectus non maximus. Integer ornare felis a mollis aliquam. Etiam placerat mauris a viverra venenatis. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ex elit, tincidunt ac bibendum maximus, pellentesque in diam. Vestibulum ornare, felis sed auctor rhoncus, purus odio facilisis est, vel posuere leo magna vitae nunc. Donec eget est in ex sodales ultricies. Nulla convallis pellentesque ipsum non feugiat. Phasellus sodales eleifend mattis. Donec et hendrerit arcu. Mauris venenatis condimentum massa, nec molestie elit euismod at. Nullam in aliquet ex. Aenean non quam quam. Mauris sodales vestibulum enim, in egestas odio sollicitudin vitae.
Tab Three	

Accordion / Tabs – Steps

Fill out the following fields:

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. **Choose your Display Settings.** You can choose:
 - E. **Widget Type** – Choose Accordions Horizontal, or Vertical Tabs.
 - F. **Section Width** – Choose between Small, Medium, or Default.

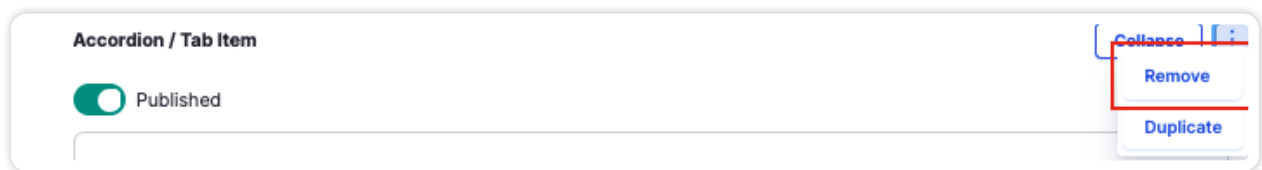
To add accordion/tab content, follow these steps:

1. Click **Accordion / Tab Item**.
2. **Add a Title.** This is what will appear on the colored part of the accordion or the tab.
3. **Choose Title Tag.** You may choose from H2 to H4 to ensure that your content is semantically correct (i.e., headers aren’t bouncing around from H2s to H4s). Note that the styling will be the same regardless of your choice.
4. **Add content to appear** when the accordion or tab is open.
5. If you want to show/hide the Accordion/Tab Item, **use the “Published” toggle.**

If you would like to add a button, follow these steps:

1. **Button URL.** This is the page or URL that you are linking to.

2. **Link text.** This is what will appear in the button.
3. **Button Aria Label.** This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”
4. Click **Add Accordion / Tab Item** and follow the steps above until you have added all the needed items.
5. If you need to delete a tab or accordion item, click the three dots at the top of the grid item. If you might want to use the item again later but don’t want to show it now, use the “Published” toggle.



Events

The upcoming events area for your financial institution's events. This may or may not be present in your current design.

Events Example

Upcoming Events

<p>Jul 04</p> <p>Fourth of July</p> <p>Enjoy the exciting firework display at Meyer Beach beginning at 10pm</p> <p>VIEW EVENT</p>	<p>Oct 10 - Oct 11</p> <p>Hot Sauce Festival</p> <p>Get your tastebuds ready! Try out a variety of hot sauces from around the country while enjoying live music.</p> <p>VIEW EVENT</p>
<p>Dec 07 - Dec 08</p> <p>Memorial Park Spring Cleaning</p> <p>Help get Memorial Park ready for the summer! Enjoy the sunshine, warm weather and good company.</p> <p>VIEW EVENT</p>	

[VIEW ALL EVENTS](#)

Events Steps

Events Preview Collapse ⋮

Published

Admin Title *

Upcoming Events

Display admin title

Section Gutter(s)

Top & Bottom ▾

Background

- None - ▾

Include link to all events?

Published toggle – You may unpublish the content if you will reuse it in the future.

Display admin title toggle – You may choose to show the Admin Title or hide it.

Background color – Colors depend on your site specific build. Typically, there is a primary, secondary, and gray.

Gutter – This allows you to add additional white space between your content types. You may need to play with these options to get the correct amount of white space on your site. Options include:

- ▶ -None-
- ▶ Top Padding
- ▶ Bottom Padding
- ▶ Top & Bottom Padding

NOTE: To add Events, you will need to add each event individually. See Add an Event section below.

General Content

General Content Examples

Standard full-width text content section, created using a WYSIWYG editor.

HEADER LEVEL 2-3 (ALSO CLASSES .H2-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vestibulum tortor quam, feugiat vitae, ultricies eget, tempor sit amet, ante. Donec eu libero sit amet quam egestas semper. *Aenean ultricies mi vitae est.* Mauris placerat eleifend leo. Quisque sit amet est et sapien ullamcorper pharetra. Vestibulum erat wisi, condimentum sed, **commodo vitae**, ornare sit amet, wisi. Aenean fermentum, elit eget tincidunt condimentum, eros ipsum rutrum orci, sagittis tempus lacus enim ac dui. **Donec non enim** in turpis pulvinar facilisis. Ut felis.

Header Level 4 (also classes .h4)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vestibulum tortor quam, feugiat vitae, ultricies eget, tempor sit amet, ante. Donec eu libero sit amet quam egestas semper. Aenean ultricies mi vitae est. Mauris placerat eleifend leo.

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2. Aliquam tincidunt mauris eu risus.

This is a blockquote section. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus magna. Cras in mi at felis aliquet congue. Ut a est eget ligula molestie gravida. Curabitur massa. Donec eleifend, libero at sagittis mollis, tellus est malesuada tellus, at luctus turpis elit sit amet quam. Vivamus pretium ornare est.

Header Level 5-6 (also classes .h5-6)

General Content Steps

General Content Section 1 Preview Collapse ⋮

Published

Admin Title *

General Content Section

Background Color

- None - ▾

This option sets a background color for the entire section.

Section Gutter(s) *

Top ▾

This option changes where extra space will be printed around the section.

Section Width

Default ▾

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. Next, add the content into the content field.

Content

Content

B I S x² x₂ I_x | | Styles | Format | Source

sit amet, ante. Donec eu libero sit amet quam egestas semper. Aenean ultricies mi vitae est. Mauris placerat eleifend leo.

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2. Aliquam tincidunt mauris eu risus.

This is a blockquote section. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus magna. Cras in mi at felis aliquet congue. Ut a est eget ligula molestie gravida. Curabitur massa. Donec eleifend, libero at sagittis mollis, tellus est malesuada tellus, at luctus turpis elit sit amet quam. Vivamus pretium ornare est.

Header Level 5-6 (also classes .h5-6)

- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Aliquam tincidunt mauris eu risus.

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.

[Standard Button](#) [Secondary Button](#)

	Online Advantage	Advantage	Basic	Classic	Investment	Platinum
Opening Deposit	\$100.00	\$100.00	\$100.00	\$300.00	\$1000.00	\$100.00
Mininum Balance	None	None	None	None	None	None
Free Checks	1st order*	1st order*	1st order*	1st order*		
Minimum to Earn Interest	\$1500 collected balance	\$100 collected balance			\$1000 collected balance	\$100 collected balance
Monthly Service Fee	\$10.00	\$2.00	\$2.00	\$10.00	\$2.00	\$2.00

	Online Advantage	Advantage	Basic	Classic	Investment	Platinum
Opening Deposit	\$100.00	\$100.00	\$100.00	\$300.00	\$1000.00	\$100.00
Mininum Balance	None	None	None	None	None	None
Free Checks	1st order*	1st order*	1st order*	1st order*		

Text format

[About text formats](#)

Display Section Sidebar

Image Gallery

This section displays your financial institution's image gallery. This may or may not be present in your current design.



Image Gallery Steps

Image Gallery Preview Collapse ⋮

Published

Display admin title

Admin Title

Display Settings

Background

▼

Section Gutter(s)

▼

Content *

Image Gallery *

▼

Image Size *

▼

Max Number of Images

Add View All button?

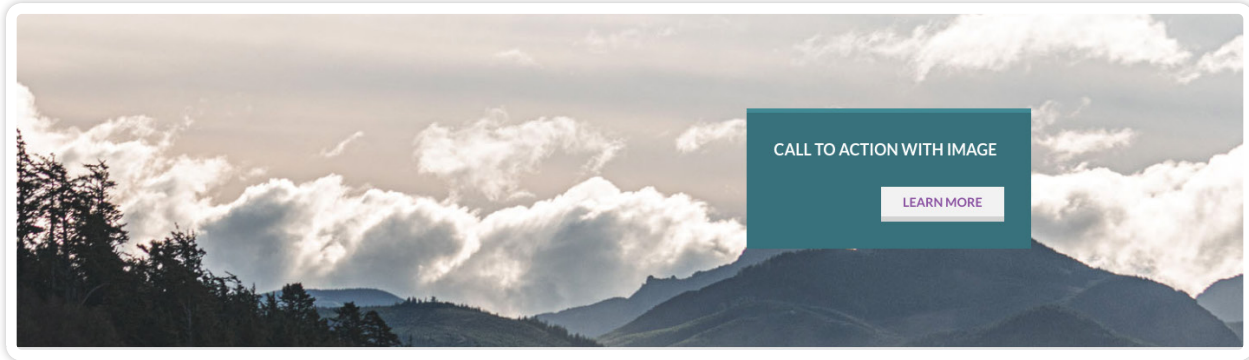
1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. Choose a pre-existing Image Gallery.
5. Choose **Small, Medium, or Large** for your image sizes.
6. Add the maximum number of images on the page.
7. Toggle whether you would like to include a link to the full gallery page.

Call to Action

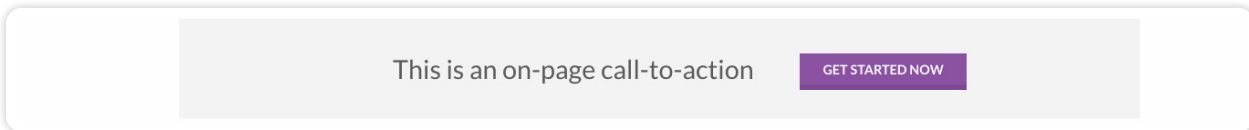
This section allows you to use a full-width background image with a text box with a link on landing pages and a fixed-width box with background color with text and link on basic pages.

Call to Action Examples

Landing Page



Basic Page

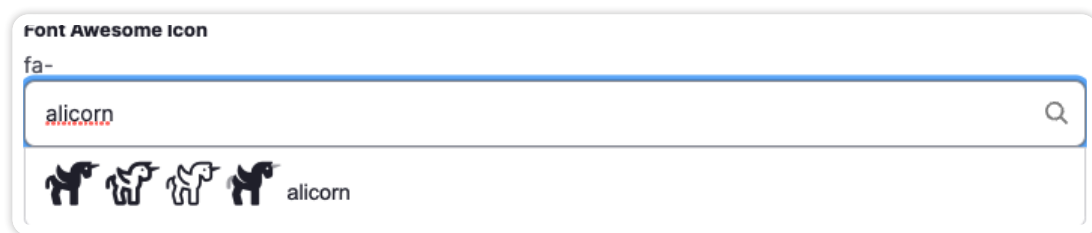


Call to Action Steps

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. Modify the content.
 - A. **Alignment** – Choose Left, Right, or Center.
 - B. **Text** – This will be the text that appears in the box.

C. **Icon/Image** – You will have the ability to select None, Font Awesome, or Image for grid items.

- **None** – Choose this option if you do not want an icon or image at the top of your grid item.
- **Font Awesome** – Under Font Awesome Icon fa- field, start typing the icon you would like to add and will appear. Click on the icon you want, then continue adding content for this section



- **Image** – Under Image Icon, click Add Media. Here you can upload an image from your computer or choose one from the library. Once uploaded, you will see a thumbnail of your image. You may continue adding content for this section.

4. Set up your button.

E. **URL** – This is the URL that the button will lead to. Keep in mind the following:

- If this leads to an internal page, then you just need to start typing the name of the page and it will auto-populate with page options. Select the correct page and move to the next field.
- If this leads to an external URL, then add the URL into this field including http:// or https://. If the link is not whitelisted, then a popup will appear for the user that they are leaving the site. If you do not want this popup to appear, request that this URL be whitelisted.

F. **Link text** – This is what will appear in the button.

G. **Button Aria Label** – This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.” See Accessibility Concerns.

Testimonial

This is a section that displays testimonials received by your financial institution.

*“Donec facilisis tortor ut augue, at viverra est semper. Sed sapien
asp, scelerisque nec pharetra id, tempor a tortor.”*

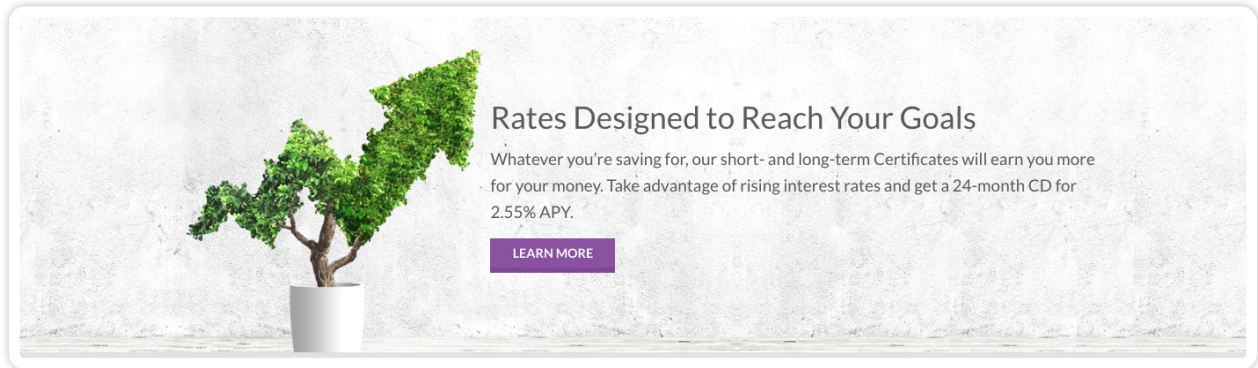
ANNE WILLIAMS
Columbus, Ohio

Testimonial Steps

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. **Add the Content.**
 - A. **Quote.** Add the desired text here.
 - B. **Name.** Add name of person giving quote.
 - C. **Title.** Add Title or text to appear under the person’s name.
 - D. **Image.** If you would like to add an image, you can do so here:
5. **Click Add Media.** Here you can upload an image from your computer or choose one from the library. Once uploaded, you will see a thumbnail of your image.

Featured Product

This is a landing page section that allows you to feature a product with a call to action.



Featured Product Steps

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. **Set a Background image.** Here, you can upload an image from your computer or choose one from the library. Once uploaded, you will see a thumbnail of your image. You may continue adding content for this section.
5. **Add the content** you would like to appear in the Featured Product section, including titles and body text for the element.
6. **Set up your button.**
 - A. **URL** – This is the URL that the button will lead to. Keep in mind the following:
 - If this leads to an internal page, then you just need to start typing the name of the page and it will auto-populate with page options. Select the correct page and move to the next field.

- If this leads to an external URL, then add the URL into this field including http:// or https://. If the link is not whitelisted, then a popup will appear for the user that they are leaving the site. If you do not want this popup to appear, request that this URL be whitelisted.

B. **Link text.** This is what will appear in the button.

C. **Button Aria Label.** This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”

Rates

A section that displays your financial institution's promoted rates.

MORTGAGES as low as 3.75% APY	VEHICLE LOANS as low as 0.74% APY	HOME LOANS as low as 3.63% APY	CREDIT CARDS as low as 5.24% APY	PERSONAL LOANS as low as 2.99% APY
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User Interface

Rates 5 Preview Collapse ⋮

Published

Admin Title *

Rates Section

Display admin title

Background Color

- None - ▾

This option sets a background color for the entire section.

Section Gutter(s) *

Top & Bottom ▾

This option changes where extra space will be printed around the section.

Content

Rate Items

Rate Item
Collapse ▼

Published

Name *

Qualifying Text *

Example: As low as, Up to, As High As, etc...

Value *

Advanced Options *

Rate Symbol *

Rate Type *

APY ▼

Rate Link

🔍

Start typing the title of a piece of content to select it. You can also enter an internal path such as `/node/add` or an external URL such as `http://example.com`. Enter `<front>` to link to the front page. Enter `<nolink>` to display link text only. Enter `<button>` to display keyboard-accessible link text only.


1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.

Content > Rate Items

4. Click **Add Rate Item**.
5. Fill in the following pieces of information:

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Canvas User's Guide

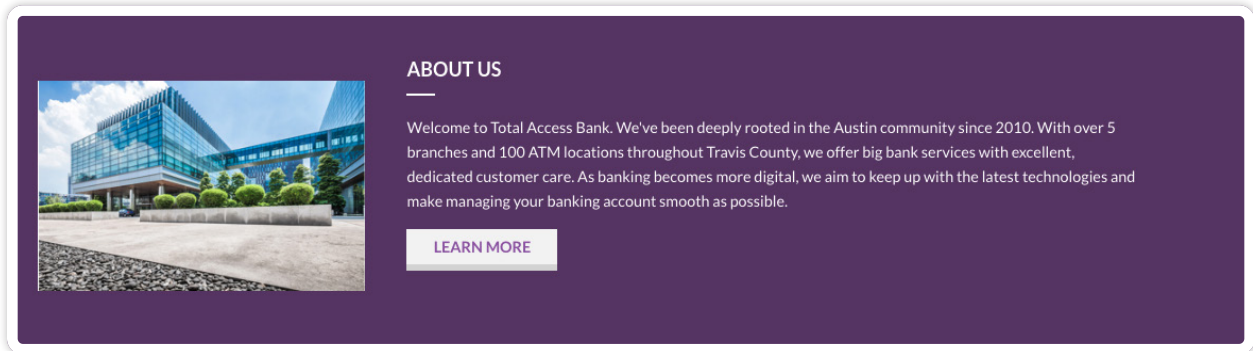

TRABIAN

- A. Name. This will label the rate type.
- B. Qualifying Text. For example, as low as.
- C. Value. This would be the rate.
- D. Rate symbol.
- E. Rate Type. Choose APR, APY, or none.

Uneven Columns

Allows you to display two columns with an uneven width. For example, an image could be in 25% of the width, and content could be in the remaining 75% of the width. This allows for a unique way to display two column content.

Uneven Columns Example



Uneven Columns Steps

1. **Enter an Admin Title.** This is a required field that helps you quickly identify a content block. You can show the Admin Title to the user by selecting the “Display admin title” toggle.
2. **Select a Background Color.** Colors depend on your site specific build. Typically, there is a primary, secondary, gray, and none (which will typically default to white).
3. **Set your Section Gutter.** The gutter gives the block padding above and below its content. You can choose “None,” “Top,” “Bottom,” or “Top & Bottom”.
4. **Select Display Settings.** Choose the split you would like (e.g., 25/75, 33/66, 40/60, 60/40, 66/33, 75/25). Note the first split number is the column on the left, with the second split number as the column on the right.
5. **Set Up Content for the Left Column.** Add the content you would like to appear in the left column in the Content field.
 - A. **Set up your button.**
 - **URL** – This is the URL that the button will lead to. Keep in mind the following:

- If this leads to an internal page, then you just need to start typing the name of the page and it will auto-populate with page options. Select the correct page and move to the next field.
- If this leads to an external URL, then add the URL into this field including http:// or https://. If the link is not whitelisted, then a popup will appear for the user that they are leaving the site. If you do not want this popup to appear, request that this URL be whitelisted.

B. **Link text.** This is what will appear in the button.

C. **Button Aria Label.** This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”

6. **Set Up Content for the Right Column.** Add the content you would like to appear in the left column in the Content field.

A. **Set up your button.**

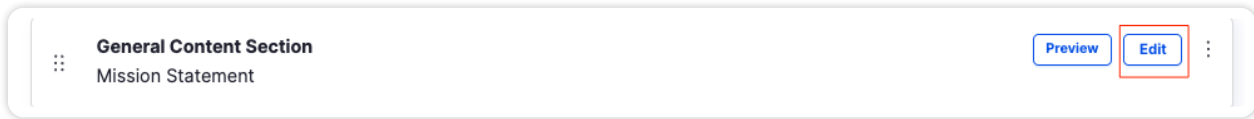
- URL – This is the URL that the button will lead to. Keep in mind the following:
- If this leads to an internal page, then you just need to start typing the name of the page and it will auto-populate with page options. Select the correct page and move to the next field.
- If this leads to an external URL, then add the URL into this field including http:// or https://. If the link is not whitelisted, then a popup will appear for the user that they are leaving the site. If you do not want this popup to appear, request that this URL be whitelisted.

B. **Link text.** This is what will appear in the button.

C. **Button Aria Label.** This is the text that will be used by screen readers to give the button/link more context. This is very important especially if the button is a “Learn More.”

Editing an Existing Content Section

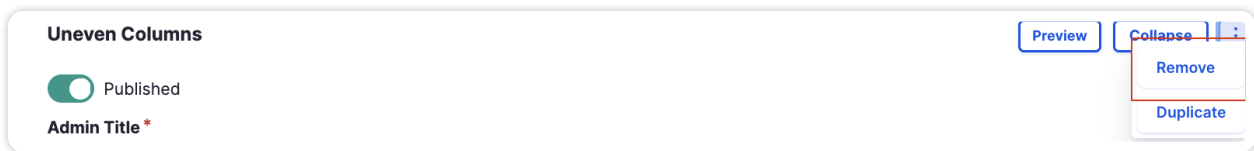
To edit an existing content section, click Edit on the far right of that section.



Deleting an Existing Content Section

To delete or remove an existing content section, click the three dots on the far right side of the section. Choose Remove.

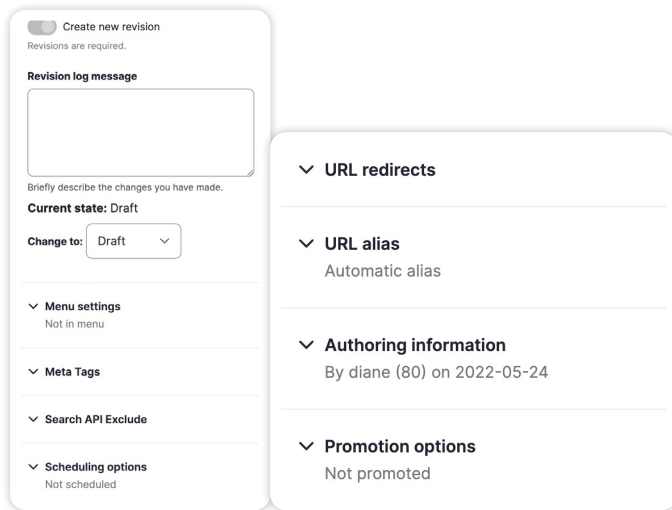
NOTE: We recommend unpublishing sections instead of removing them. Once you choose Remove and confirm removing, you will have to rebuild that section if you want it again.



Content Sidebar

If you would like to include a sidebar on basic pages, and your content types are full width, then the only place you can add them are in a General Content section. Be mindful of the length of your sidebar so that it does not exceed the length of your General Content section. If you do not pay attention to this, then you will have more whitespace on your site to allow for a longer sidebar.

Additional Page Settings in the Edit Sidebar



The additional page settings can be found on the right sidebar of your screen when creating or editing content. The items displayed in the white right-hand menu can also be updated while you are making edits to landing and basic page:

Create a new revision toggle is always on.

Revision log message - This is handy when you make a new draft so you know what changes are made in that revision.

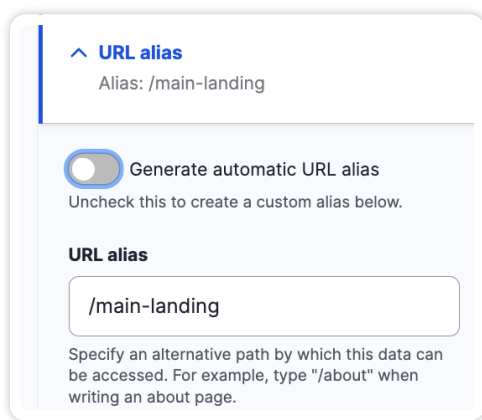
Menu Settings – you do not need to do anything with this unless you are creating a new page. If you are creating a new page, then this section allows you to:

- ▶ **Create a menu link title** – This is the title of the page that will display in the menu.
- ▶ **Add to the specific area of the menu** – This is found under “Parent item” and select the place where you would like to add the page. Note, it might be easier to add the page to the menu using the instructions in the Menu section.
- ▶ **Meta Tags** – this is where you will add your meta tag information. This includes basic tags by way of descriptions, abstracts, and keywords.

Search API Exclude - Prevent this node from being indexed. Green toggle means this is enabled.

Scheduling Options – We recommend using Scheduled Transitions instead of Scheduling Options for most Content Types, however, this setting should be enabled on items that are either on or off like Events. If you have a page that is time sensitive on when it can be live on your site, then this is where you will set the publish and unpublish times. Keep in mind that you do not have to include an unpublish date and time. If you add a time, the time is associated with your local time zone.

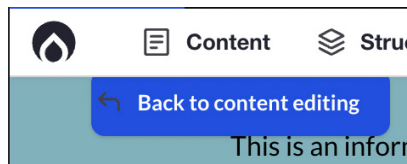
URL Alias – you have the ability to add an alias on the page. Typically, the alias is the title of the page with hyphens in place for spaces. If you would like to change the alias, untoggle the Generate automatic URL alias and add what you would like the new alias to be.



Authoring Information – this will always display the original author of the page. It is editable, but really should not be altered.

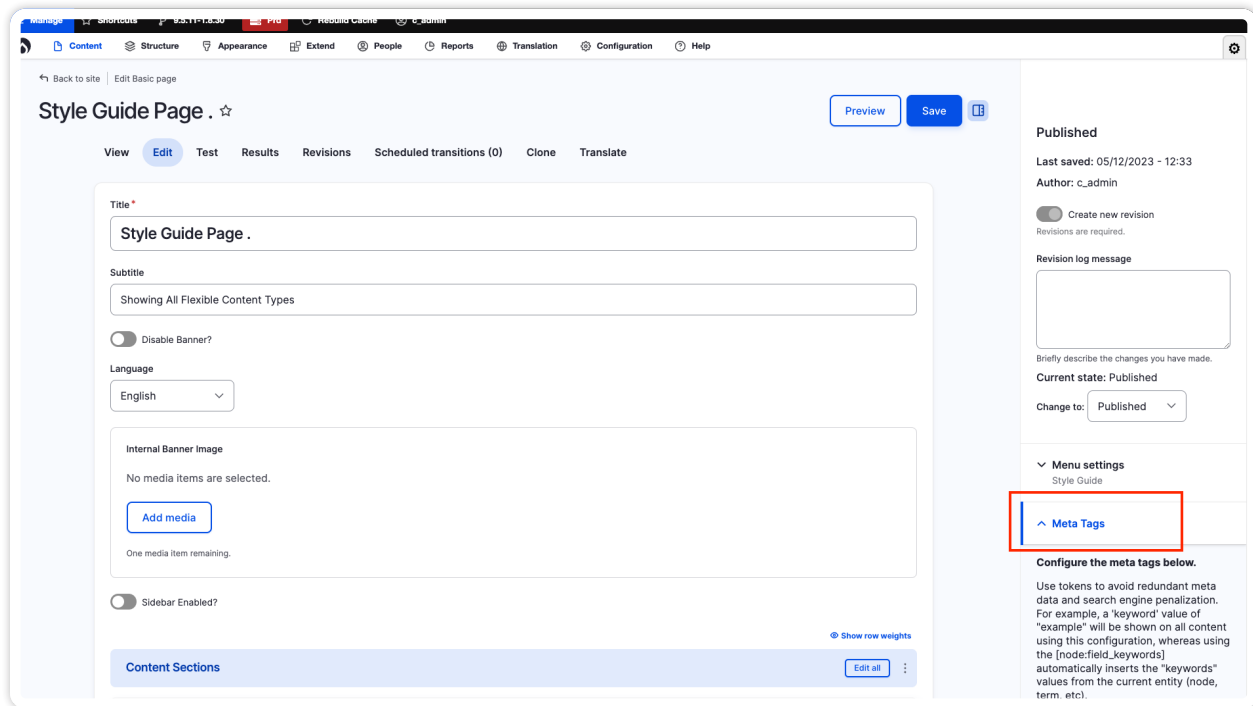
Preview

You do have the ability to preview the page before publishing by clicking on “Preview” in the top right-hand menu. This allows you to see the changes made to the site. Once you are done previewing, then click on the blue text “Back to content editing” in the top left corner of your screen.



Adding Meta Tags

The Meta Tags section is located in the right sidebar when editing a page of content. Expand the Meta Tags accordion and also expand the Basic tags accordion to reveal the fields.



The main two fields to add meta tag content to are the Page Title and the Description. The Page Title is automatically generated with the tokens that are already there, so there's no need to change it except for maybe the Homepage where you would want something better than "Homepage". The Description field is where you would add a short summary of what the page is about.

Simple meta t

Leave the title tokens as they are. The site and site title get pulled in automatically

Page title

`[node:title] | [site:name]`

The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page, or as the page title in a search engine result. It is common to append '[site:name]' to the end of this, so the site's name is automatically added. It is recommended that the length be no more than 55 - 65 characters and no more than 100 spaces.

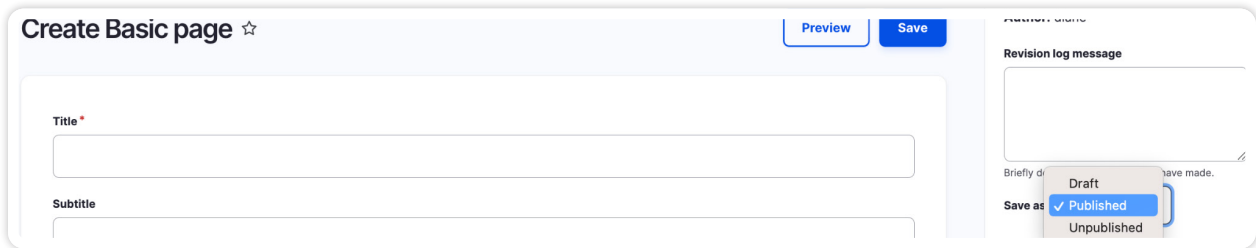
Add a description of the page's content here with a maximum limit of 160 characters

Description

A brief and concise summary of the page's content that is a maximum of 160 characters in length. The description meta tag may be used by search engines to display a snippet about the page in search results.

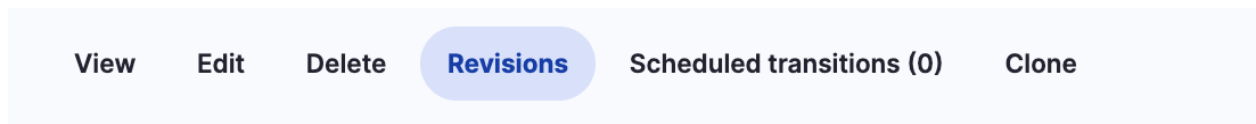
Publishing

When you save the page, on the right-hand side, you will see that it is being saved as Published. If you do not want it published, you can save it as a Draft or Unpublished.

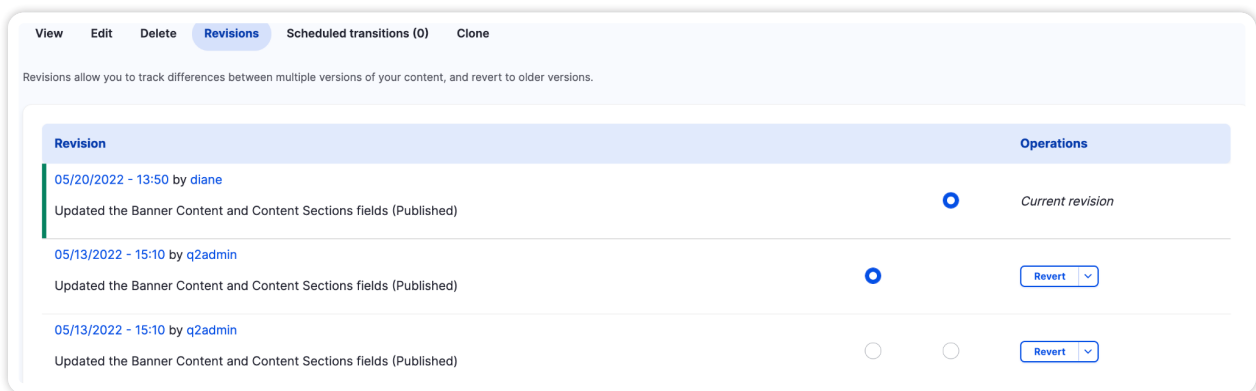


Revisions

If you need to revert to an older version of a page, then you can do this on the Revisions tab. This tab is located in editing menu for the page:



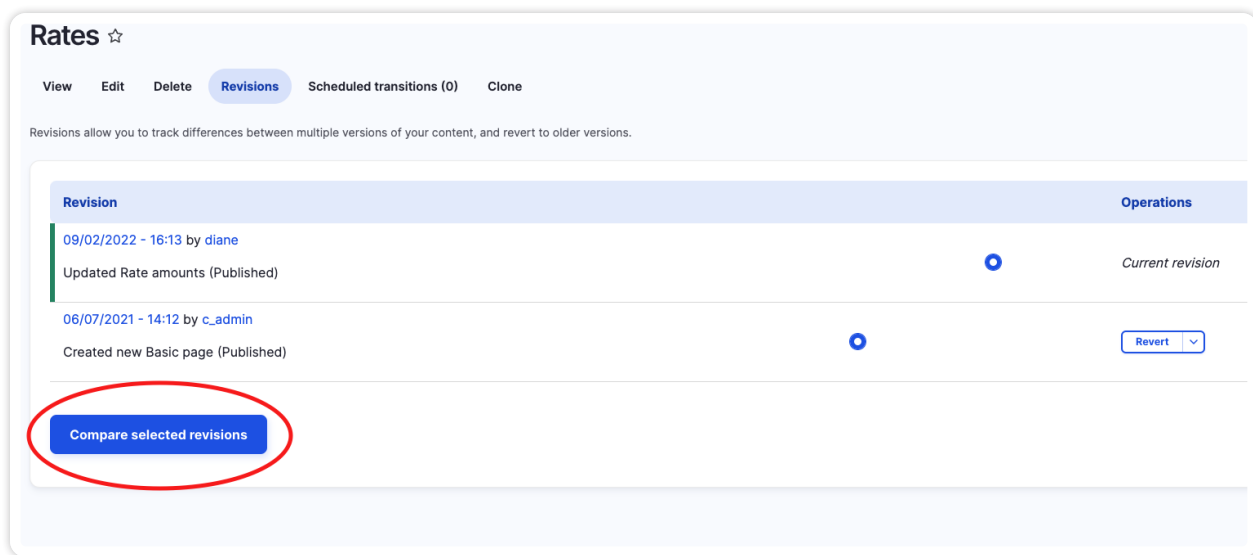
On this page, you have the ability to view a revision prior to reverting it. To do this, go to the revisions page and find the revision you think is correct. To view it, click on the date/timestamp on the left side of the page:



You will be able to see this version of the page. If it is not correct, then keep looking through versions until you find the correct one. Keep in mind that ANY changes to the page after that time will get erased when you revert the page.

Once you find the correct version, click on the radio button on the second column and click revert.

You can also compare two versions of the page and see the differences that are highlighted.



The screenshot shows the 'Revisions' tab for a page titled 'Rates'. The interface includes a navigation bar with 'View', 'Edit', 'Delete', 'Revisions', 'Scheduled transitions (0)', and 'Clone'. Below the navigation bar, a note states: 'Revisions allow you to track differences between multiple versions of your content, and revert to older versions.' The main content area is a table with two columns: 'Revision' and 'Operations'. The table lists two revisions:

Revision	Operations
09/02/2022 - 16:13 by diane Updated Rate amounts (Published)	<input checked="" type="radio"/> Current revision
06/07/2021 - 14:12 by c_admin Created new Basic page (Published)	<input type="radio"/> Revert ↓

At the bottom of the table, there is a blue button labeled 'Compare selected revisions', which is circled in red in the image.

View the highlighted differences between versions:

DIFF GENERAL SETTINGS

The perfect rates to meet your goals

Comparing
09/02/2022 - 16:13 **diane** Updated Rate amounts
06/07/2021 - 14:12 **c_admin** Created new Basic page

Layout **View mode**
Visual Inline ▾ Default ▾

Rates

VEHICLE LOANS as low as 0.74 0.80 %	HOME LOANS as low as 3.63 4.12 %	CREDIT CARDS as low as 5.24 6.32 % APY	PERSONAL LOANS as low as 2.99 3.12 %
--	---	---	---

SUB HEADING

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam ac quam id dolor sodales convallis vel dapibus purus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam ac quam id dolor sodales convallis vel dapibus purus.

	Current Rate	APY*
• Lorem ipsum dolor	30-Year Fixed	4.361% 4.361%

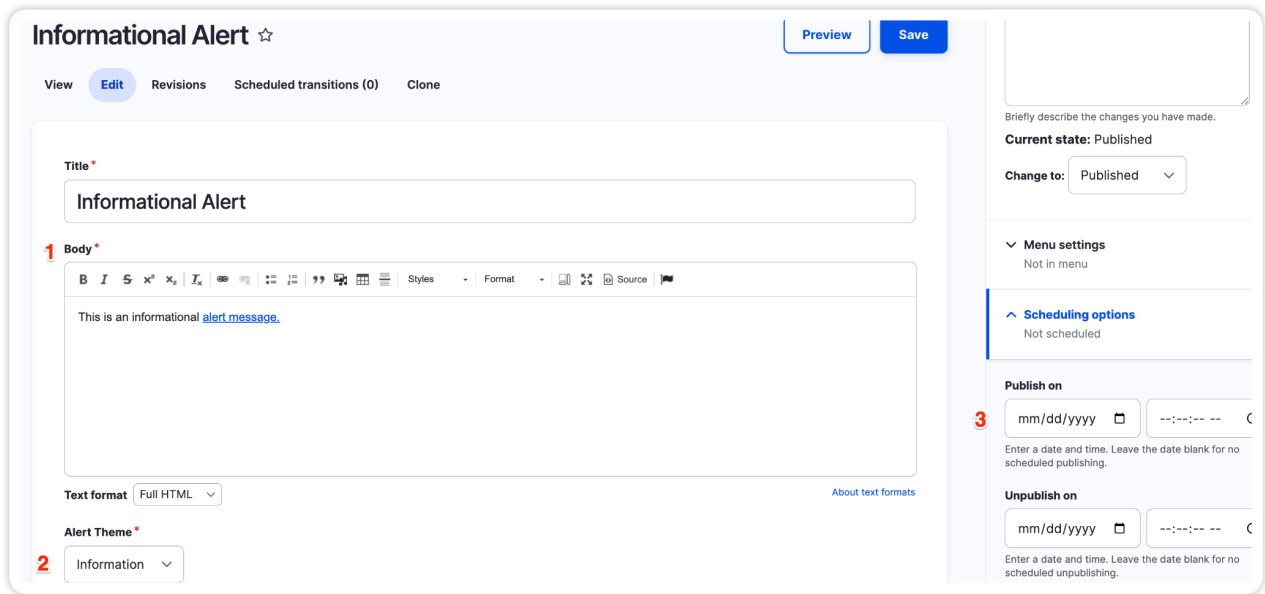
Scheduling/Updating an Alert

Alerts allow you to provide important, time-sensitive information on your website.

To begin, go to “Content” and filter by “Alert.” If you have multiple alerts, select the appropriate alert and click “Edit” under “Operations.”

On the editing page, you can do the following (see the image with corresponding numbers):

1. Update the content for the alert
2. Change the Alert Theme (General, Information, and High Priority)
3. Schedule it to publish and unpublish at a specific time.

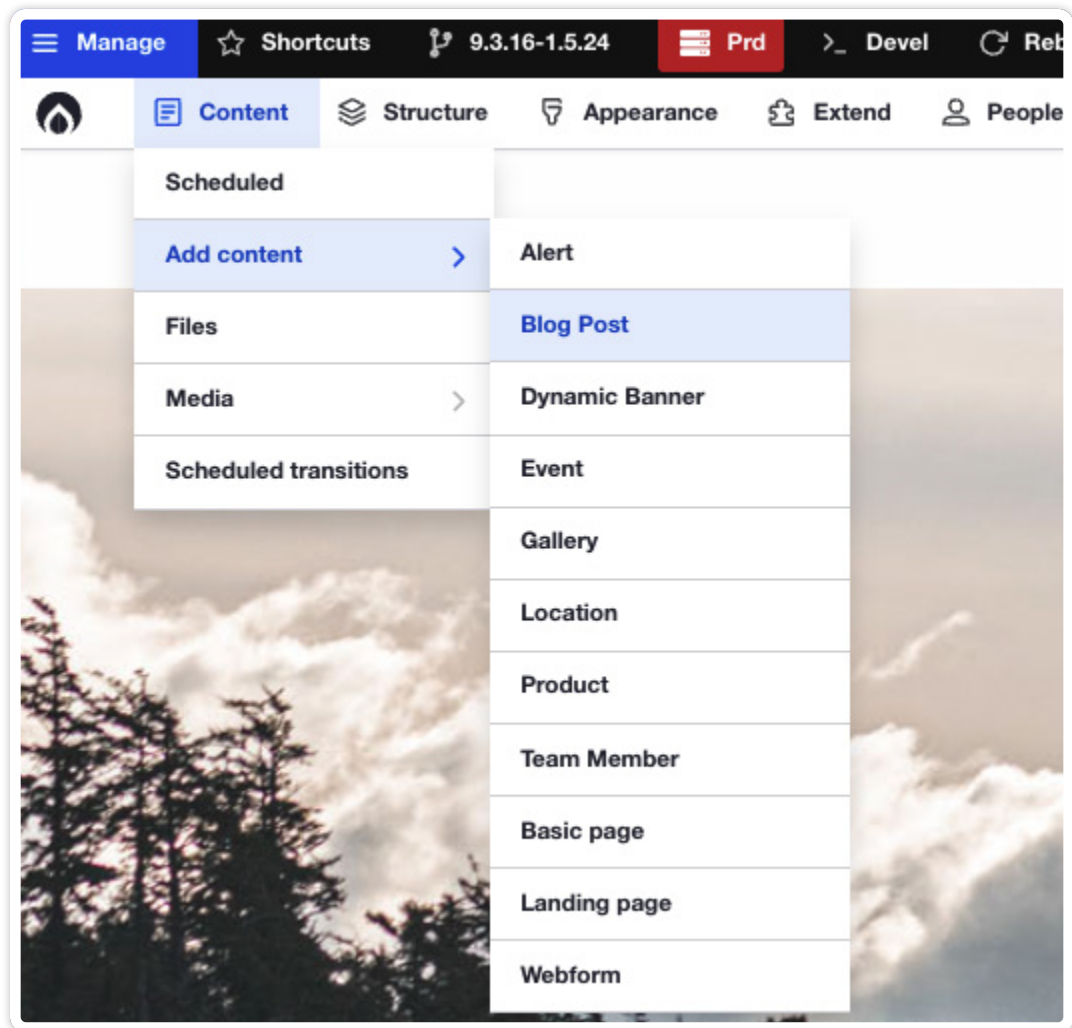


NOTE: Ensure that you have added [ARIA label text](#) if you are using a “Learn More” link.

4. Click “Save.”

To create a new blog post, follow these steps:

1. Go to Content > Add Content > Blog Post



2. Filter content type by “Blog Post.” Click on Filter.
3. Find the blog that you would like to edit.
4. Click on “Edit” under “Operations.” On the editing page, you can update the below information as needed:

- Title

- Featured image
- Content
- Categories (for Advanced Blog module only)
- Tags (for Advanced Blog module only)

5. Click “Save.”

To edit an existing blog article, follow the below steps:

1. Go to the main Content page.
2. Filter content type by “Blog Post.” Click on Filter.
3. Find the blog that you would like to edit.
4. Click on Edit.
5. On the editing page, you can update the below information to the content of the blog post:
 - Page title
 - Featured image.
 - Content
 - Categories
 - Tags
6. Click “Save”

Creating/Editing an Event

To create an event, follow the below steps:

1. Go to Content > Add content > Event.
2. Fill in the appropriate fields, including title, event location, event dates (you do not need to include an end date if it is unknown), and event body. If you need help with the event body, then see Intro to CKEditor for content adding/editing instructions.
3. Click "Save."

To edit an event:

1. Go to the main Content page.
2. Filter content type by "Event." Click on Filter.
3. Find the event that you would like to edit.
4. Click on "Edit" under "Operations"
5. On the event page, you can update the fields as needed.
6. Click "Save."


NOTE: If you include an end date for the event, the event will drop off your calendar at the specified date and time.

Creating/Editing an Image Gallery

To create a new image gallery:

1. Go to “Content” > “Add content” > “Image gallery”
2. Add Title, Subtitle (optional), choose whether you would like to disable the banner or override the default banner.
3. Add an Admin title for the gallery image.
4. Add gallery image; you can either upload a new image or choose from an image from the library.
5. Add an image caption (optional).
6. Choose whether you would like to link the image. If yes, choose Modal (which opens a larger version of the image in a modal) or Link (which allows you to link to a page). If not, choose No Link.
7. Add as many images as you’d like; there is no limit.
8. Click “Save.”

If you would like to edit an image gallery, follow the below steps:

1. Go to the main Content page.
2. Filter by content type “Image Gallery”. Click on Filter.
3. Find the gallery that you would like to edit.
4. Click on “Edit” under “Operations.”
5. To change the order, you can click on the six dots  for an image and drag and drop it where you would like it to go.

6. To update an image and/or its caption or link, click Edit on that image.
 - To change the image, click the x on the top, right-hand corner of the image and choose a new image.
 - To add/update a caption, update the text in the Image Caption field.
 - To update Link Type or Image Link, update those fields as needed.
 - To add more images, click Add Gallery Image.
7. Click “Save.”

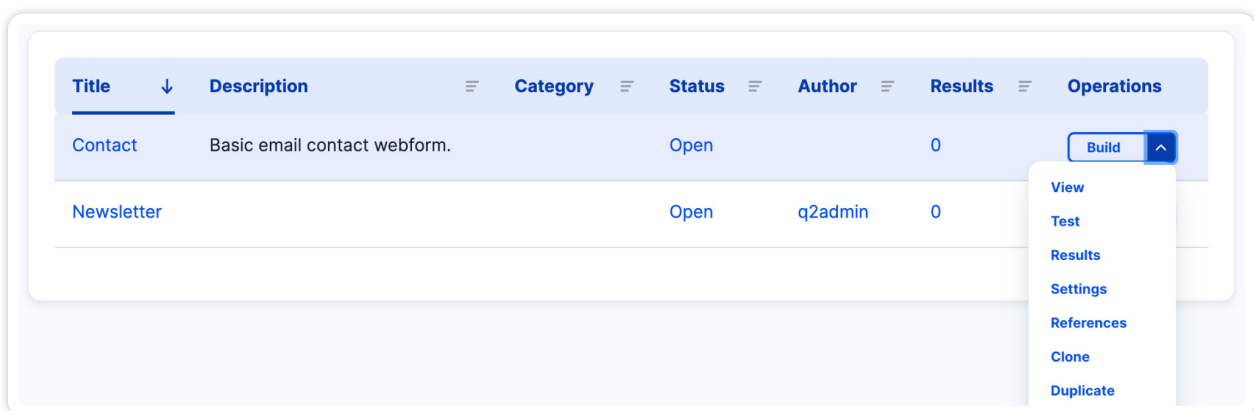
Adding a New Webform

Should you need to update where a form submission goes, or add a new email address for a submission to be sent, please follow the below instructions:

How to Edit Email Address Information for Form Submissions

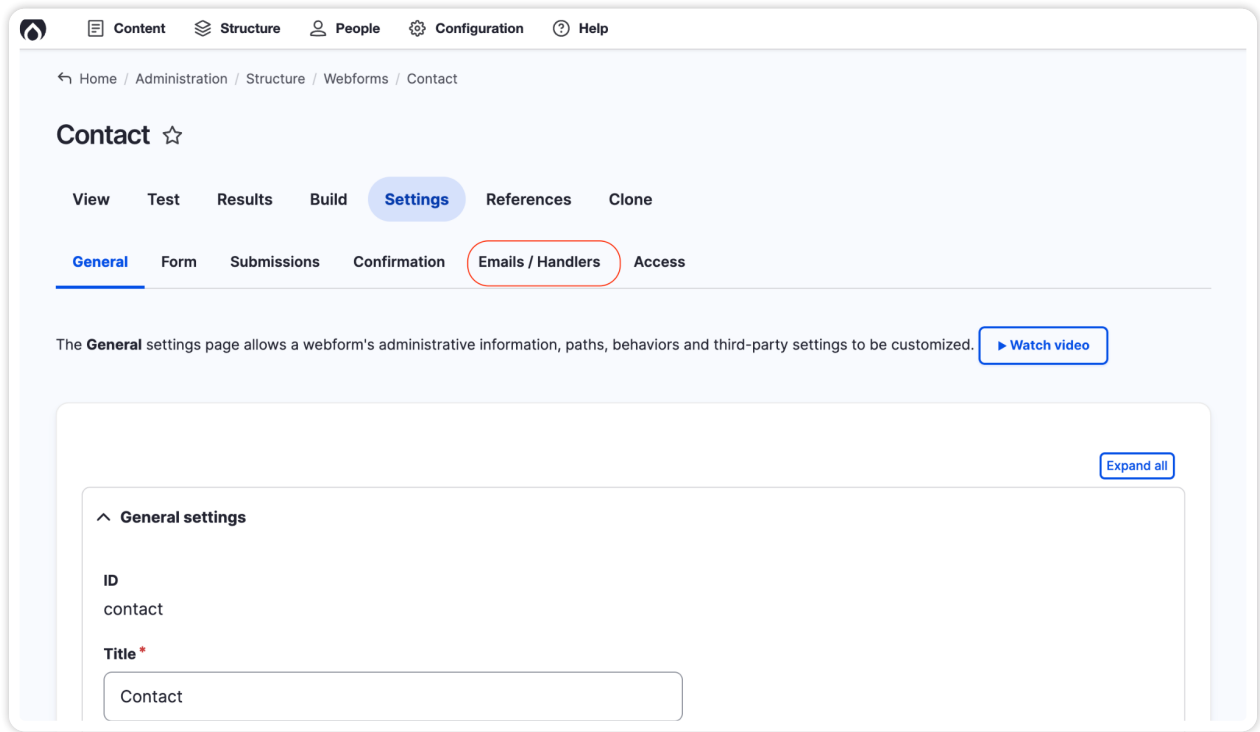
To edit an existing email address for form submission, find the form on the list of current forms.

For example, if you want to edit the “Contact” form, under “Operations” click on “Settings” for this form. This header for this page will look like the following:



Title	Description	Category	Status	Author	Results	Operations
Contact	Basic email contact webform.		Open		0	Build
Newsletter			Open	q2admin	0	View Test Results Settings References Clone Duplicate

Under the second level menu, click on “Email/Handlers”. The next page will look like the following:



1. On this page, under “Title/Description”, you will notice “Email confirmation” and “Email notification”.
2. The “Email confirmation” is the email that is sent to the end user upon form submission. This will default to an enabled status. Should you want to disable it, just click on “Edit” under “Operations” and click on “Disable”.

NOTE: you must save for this change to take effect.

3. The “Email notification” is the email that is sent to your internal team to let them know a submittal has been received for this form. To edit the email address:
4. Click on “Edit” under “Operations”.
5. On the next screen, you can update the following fields:

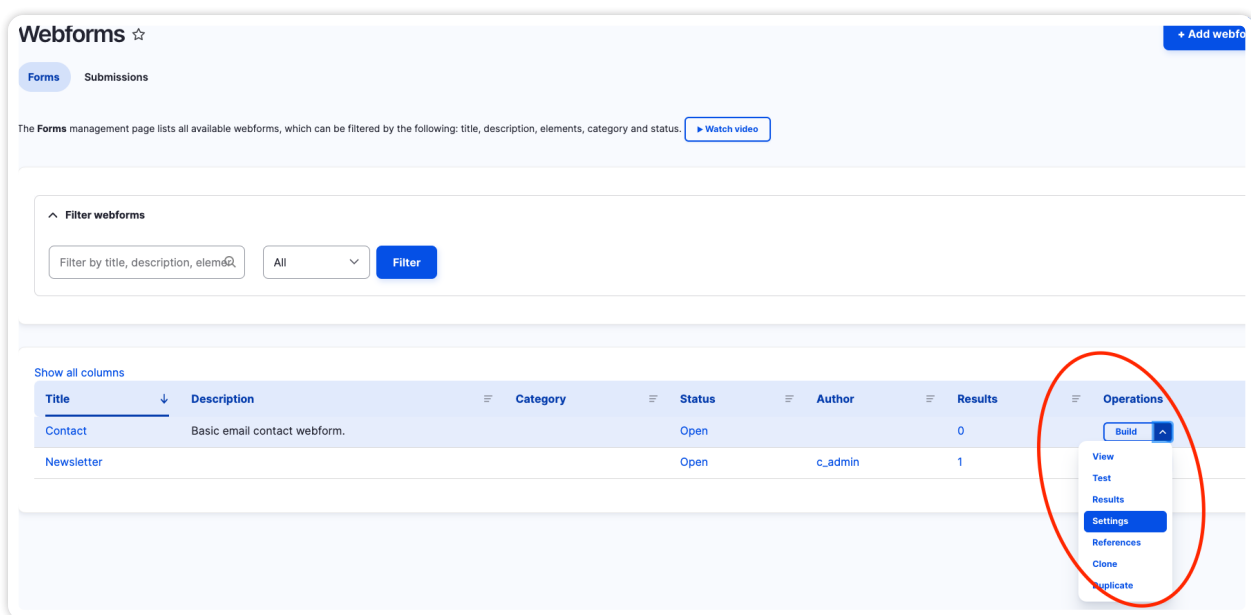
6. Under “General Settings”:

- A. “Title” – This is the title of the Webform Submission. This default to the machine name but can be changed if desired.
- B. Under “Send To” : “To email” – This is where the notification for the form submission will be sent. This defaults to the site email but can easily be changed.
- C. Under “Send From” : “From email” – This is usually set as the site default email address but can also be set at the email address from the end user that submitted the form.
- D. Once you have completed your updates, be sure to save.

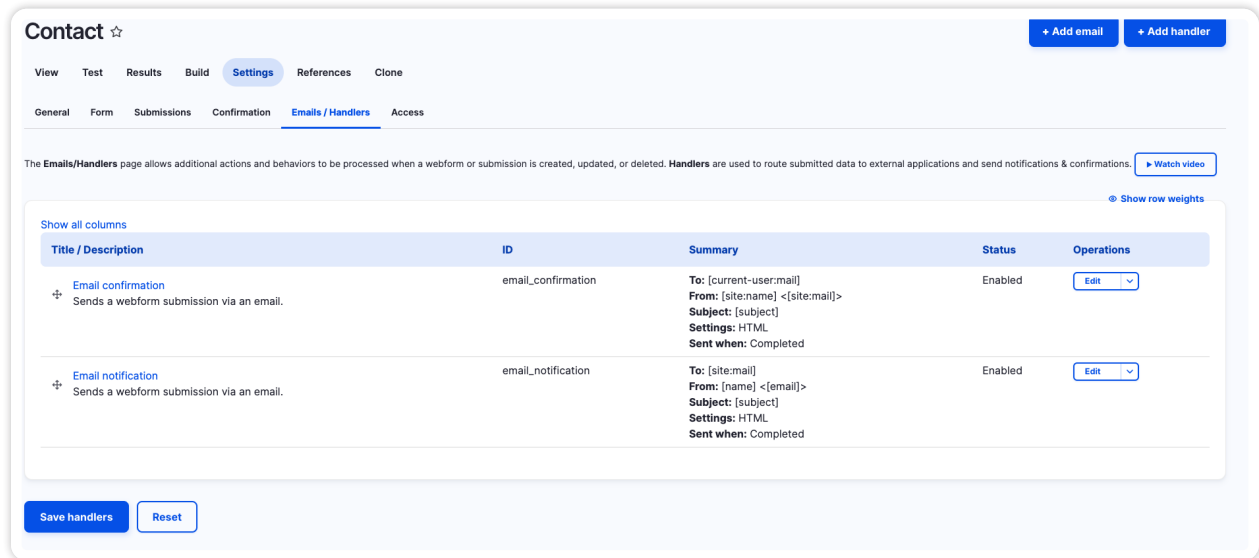
How to Edit Email Address Information for Form Submissions

To add a new email address for form submission, find the form on the list of current forms.

For example, if you want to edit the “Contact” form, under “Operations” click on “Settings” for this form. This header for this page will look like the following:



Under the second level menu, click on “Email/Handlers”. The next page will look like the following:



5. On this page, under “Title/Description”, you will notice “Email confirmation” and “Email notification”.
6. The “Email confirmation” is the email that is sent to the end user upon form submission. This will default to an enabled status. Should you want to disable it, just click on “Edit” under “Operations” and click on “Disable”.

NOTE: You must save for this change to take effect.

7. The “Email notification” is the email that is sent to your internal team to let them know a submittal has been received for this form. To add a new email address to receive form submission notifications:
8. Look for an existing “Email notification”. Under “Operations”, click on the dropdown and select “Duplicate”.
9. On the next screen, you can update the following fields:
 - A. Under “Send To” : “To email” – This is where the notification for the form submission will be sent. Update this to where you want the form submission to also be sent.

- B. Under “Send From” : “From email” – This is usually set as the site default email address but can also be set at the email address from the end user that submitted the form.
- C. Once you have completed your updates, be sure to save.

Submissions

To view form submissions on your site, go to “Structure” > “Webforms”

On the next page, you will be able to see the number of submissions each form has received. To view the submissions, find the Webform of interest on the page and click on “Results” under “Operations”:

Submissions for this form will display on the next page.

Example:

The screenshot shows a table titled "1 submission" with a "Customize" button in the top right. Below the title is a dropdown menu set to "- Select operation -" and an "Apply to selected items" button. A "Show all columns" link is also present. The table has the following columns: #, star icon, lock icon, folder icon, Created, Submitted to, User, IP address, Name, Email, and Operations. There is one row of data with the following values: # 1, star icon, lock icon, folder icon, Created Thu, 06/30/2022 - 15:07, Submitted to Main Landing, User c_admin, IP address 69.237.103.163, Name Test, Email test@test.com, and Operations Edit (dropdown arrow). There is another "Apply to selected items" button at the bottom of the table.

#	Created	Submitted to	User	IP address	Name	Email	Operations
1	Thu, 06/30/2022 - 15:07	Main Landing	c_admin	69.237.103.163	Test	test@test.com	Edit

From this page, you can:

1. **Process the form and mark complete.** To do this, follow the below instructions:
2. **Click on “Notes” under “Operations”.**
3. If the submission has been processed, then on the next screen complete the following steps:
4. **Add “Administrative notes” to detail how the submission was processed.**

5. **Check the box called “Star/flag the status of this submission”.**
6. **Click save.**

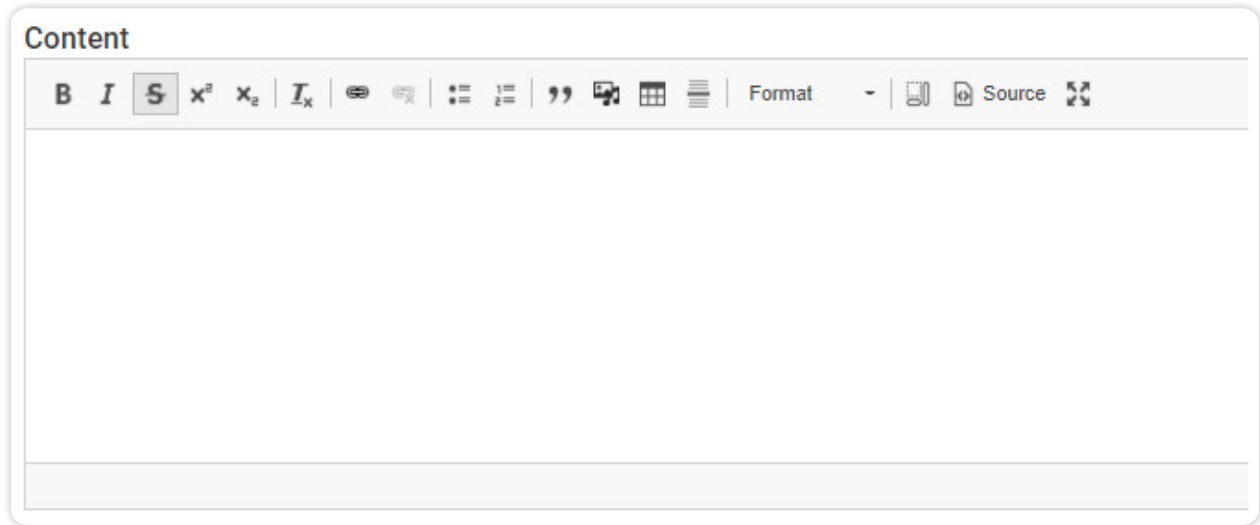
NOTE: To see the forms that have/have not been processed, the filter can be used for “Starred” vs. “Unstarred”. “Starred” means that the submission has been processed and “Unstarred” means that the submission has not been processed.

7. **Download a batch of submissions.** When downloading a batch of submissions, you have the ability to select the format, element options, and date options.
8. **Clear out the submissions.** Note, we cannot retrieve any submissions, so this should be used with extreme caution. After testing and before initial website launch may be a good time to use this feature, so that all submissions are true customer form submissions.

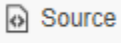



NOTE: The development/editing of forms on Drupal 9 is complex. Prior to making further edits/adjustments to form submissions, please contact Trabian for help.





Intro to CKEditor

CKEditor is the tool that you will use to add content to your site. On the editing page for your site, the CKEditor will look like this:



From this toolbar, you have the ability to perform many tasks. You can hover over each icon in the editor to view a descriptor on what each icon will do. This table will walk you through some common icons and their meanings.

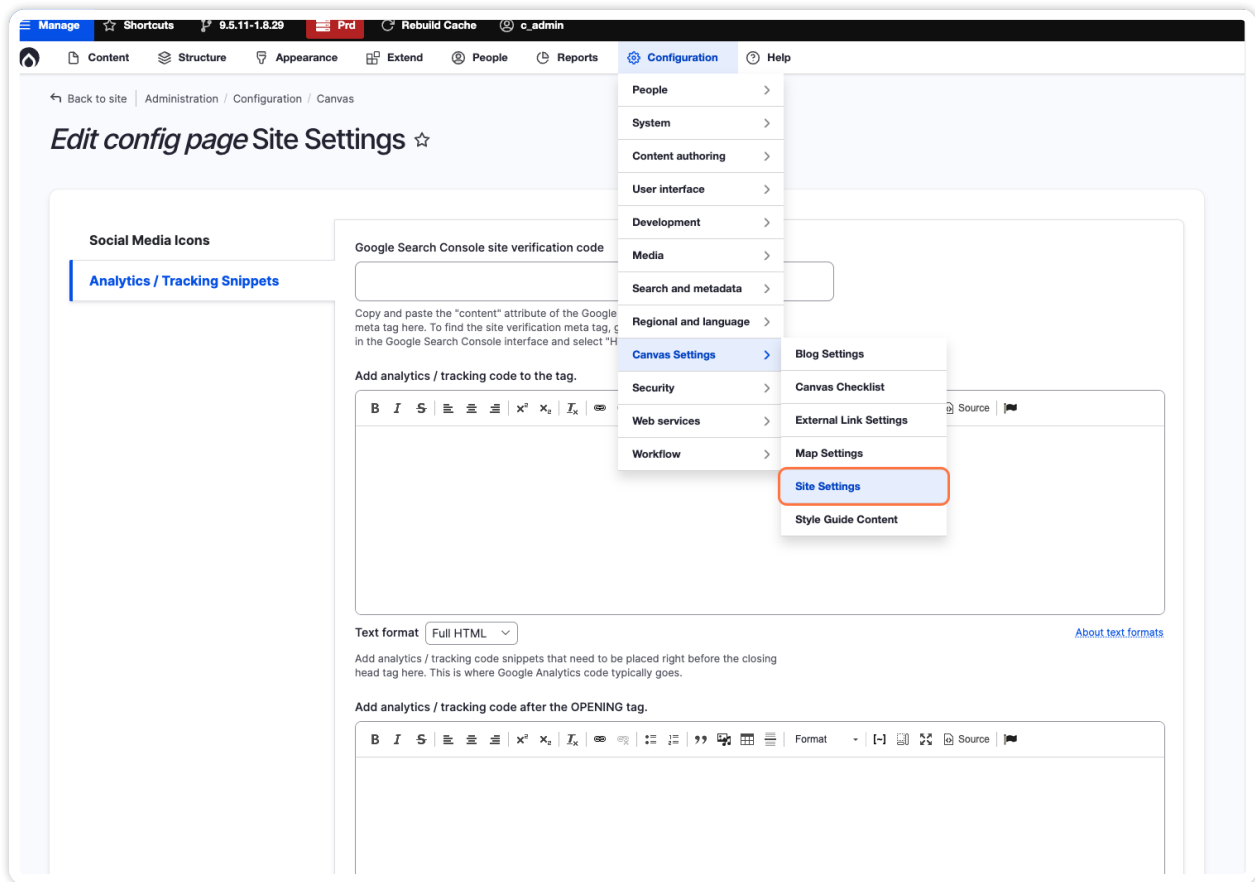
<i>Icon</i>	<i>Description</i>
	<p>Use this icon to see the HTML version of your content.</p>
	<p>Use this icon to see the dividers for your content. This includes p tags and divs.</p>
	<p>Do not use this icon when you are copy/pasting content into your site. It will not remove the additional formatting that comes with the content.</p>
	<p>Use this icon to add an image.</p> <p>You can either upload a new file or select an image via the media library.</p> <div data-bbox="516 1037 1442 1304" style="border: 1px solid black; padding: 10px; background-color: #f0f0f0;"> <p>NOTE: If the image is decorative (i.e., it does not need to convey a message), then no alt text is needed for accessibility purposes. If the image requires alt text, then please reference this section of the document regarding accessibility.</p> </div>

<i>Icon</i>	<i>Description</i>
	<p>Use this icon to add a link to text or images.</p> <p>If you are linking to an internal page to the website, then start typing the title of the page in the URL field. It will populate with page options. Select the correct page and click save.</p> <p>If you are linking to a page that is external to your website (e.g., Google), then just copy/paste the link into the URL field and save.</p> <p>This icon can also link to a PDF by searching by the PDF name.</p> <p>Additionally, if you want to turn a content link into a button, then click on “Advanced” and add “Button” in the “CSS classes” field.</p>
	<p>Use this icon if you want to remove a link from content or an image.</p>
	<p>Use this icon if you have a lot of content on a page and would like to expand it to a larger box to see more of it. You will have to click on this icon again to minimize it and save the page.</p>
	<p>Tokens are used for inserting content into multiple places without having to remember where you put it. You can even create Custom Tokens that allow you to create content and edit one place.</p>

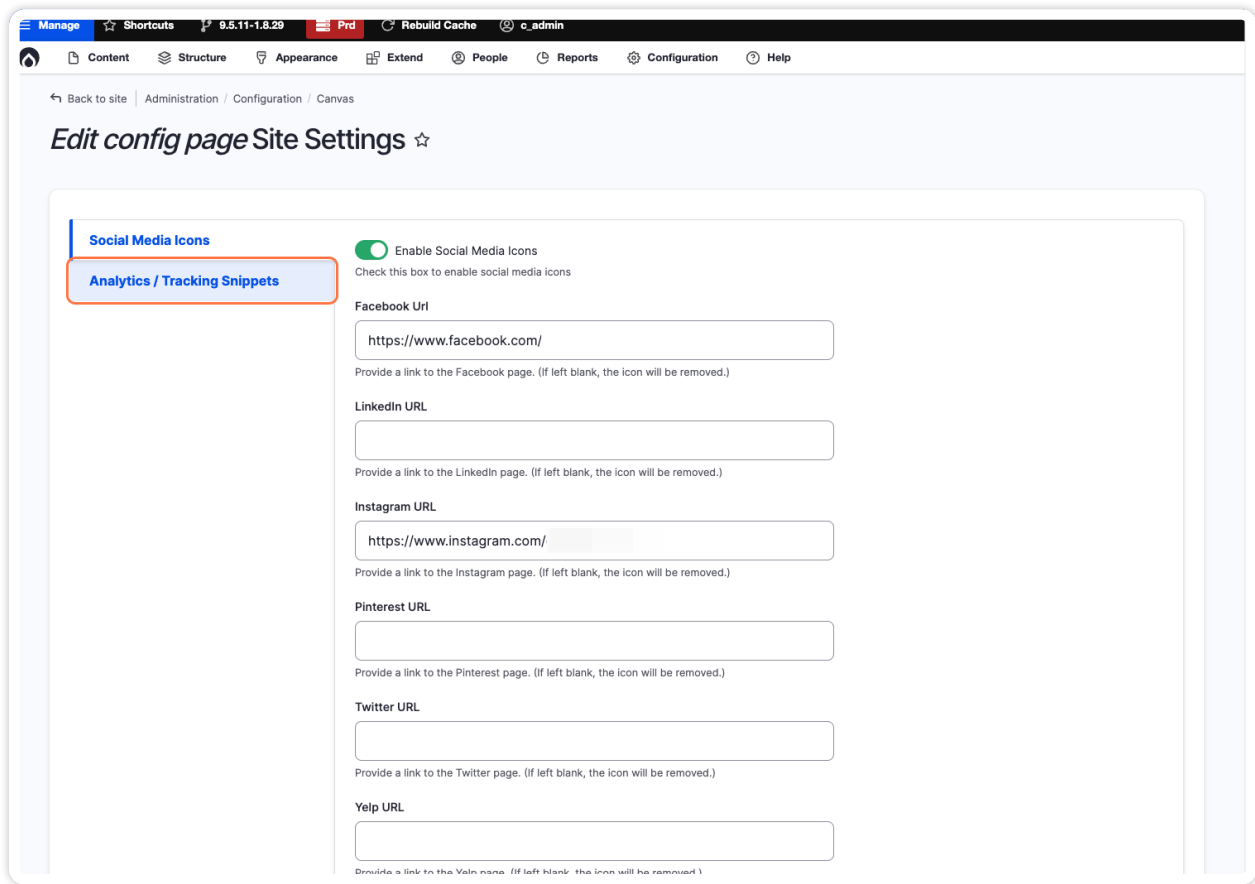
NOTE: If you would like to copy/paste content into the CKEditor, to remove additional formatting with your content, please use Control-Shift-V for your desktop and Command-Shift-V for your mac.

Configuring Analytics and Tracking Code in Canvas

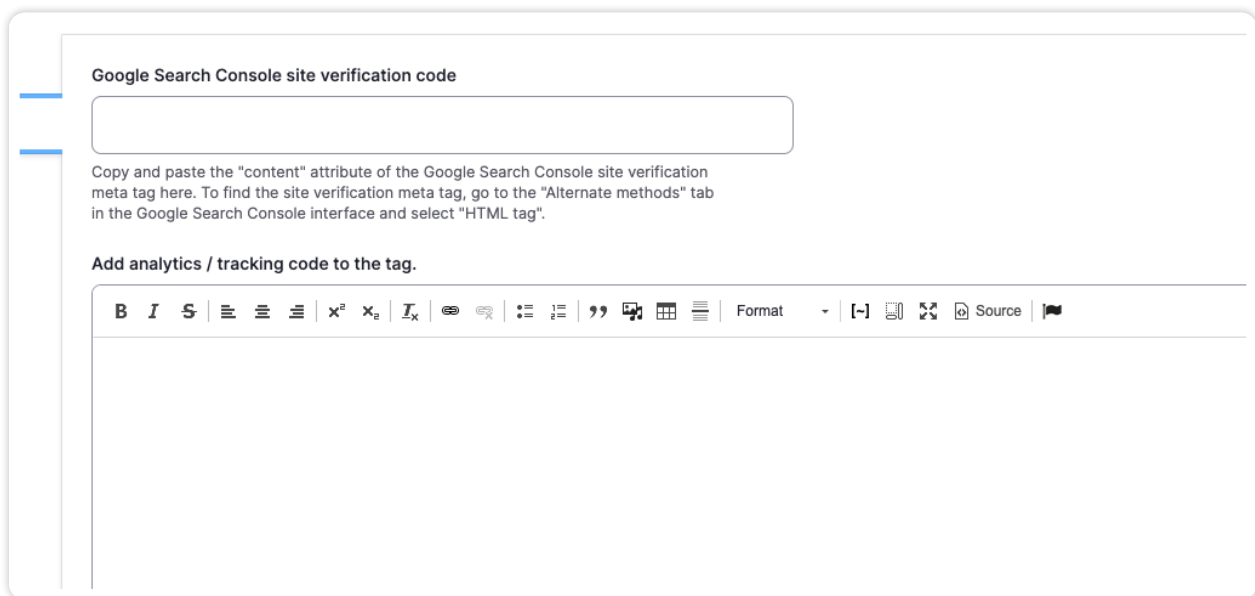
1. Go to Site Settings:



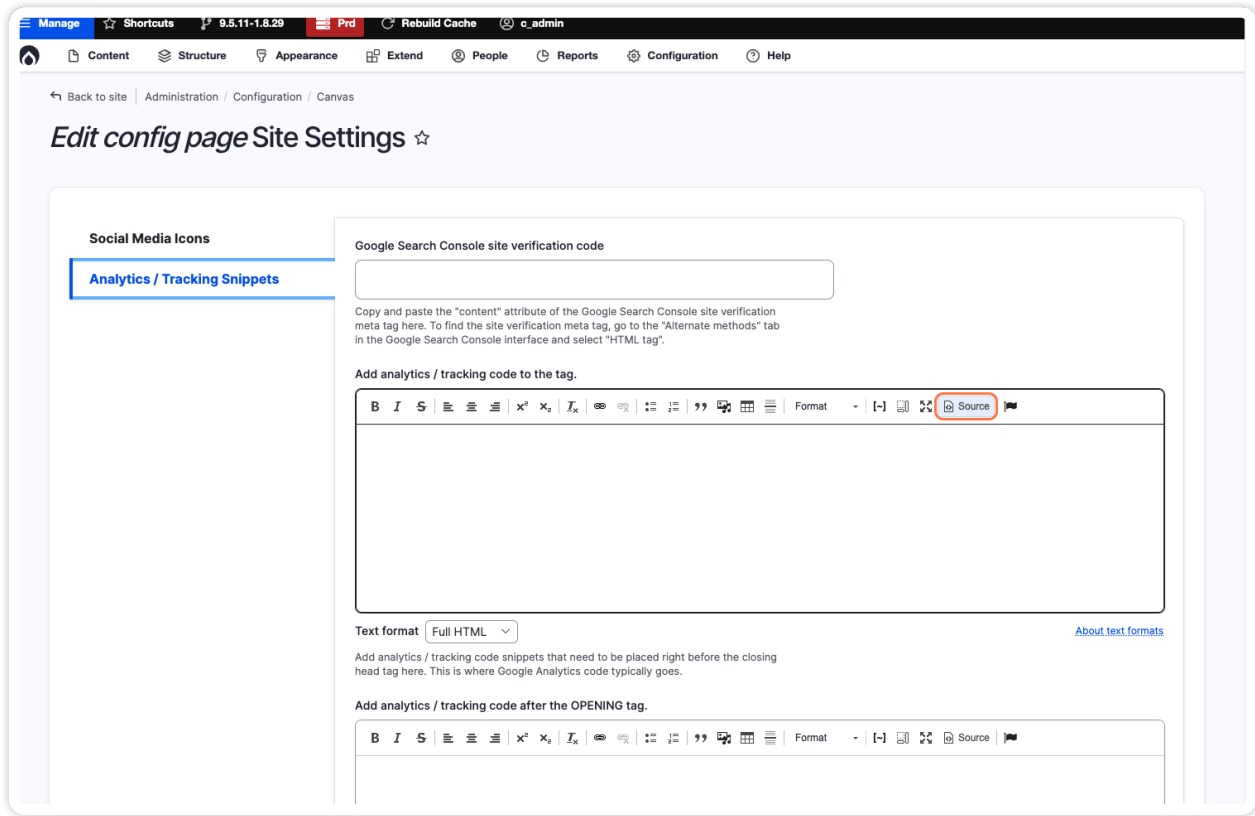
2. Click on “Analytics / Tracking Snippets”



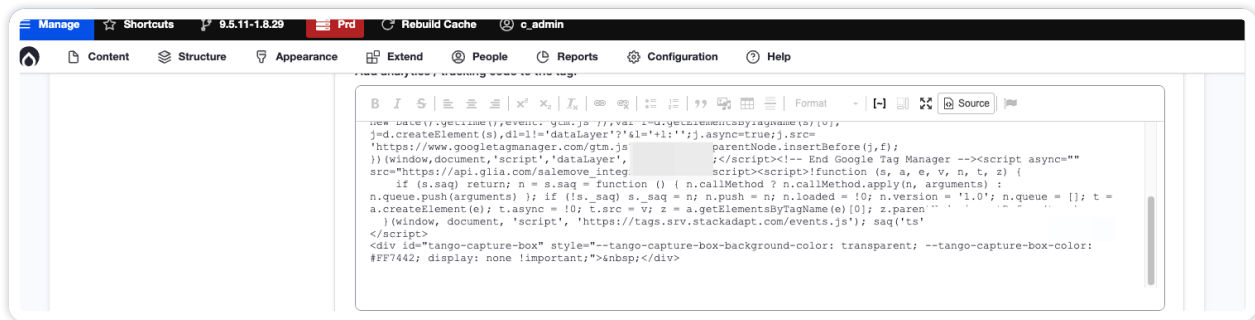
3. For scripts that go in the ‘<head>’ tag, go to the section “Add analytics / tracking code to the tag.” This will apply the script to every page on the website.



4. Click on the Source button to see the HTML code.



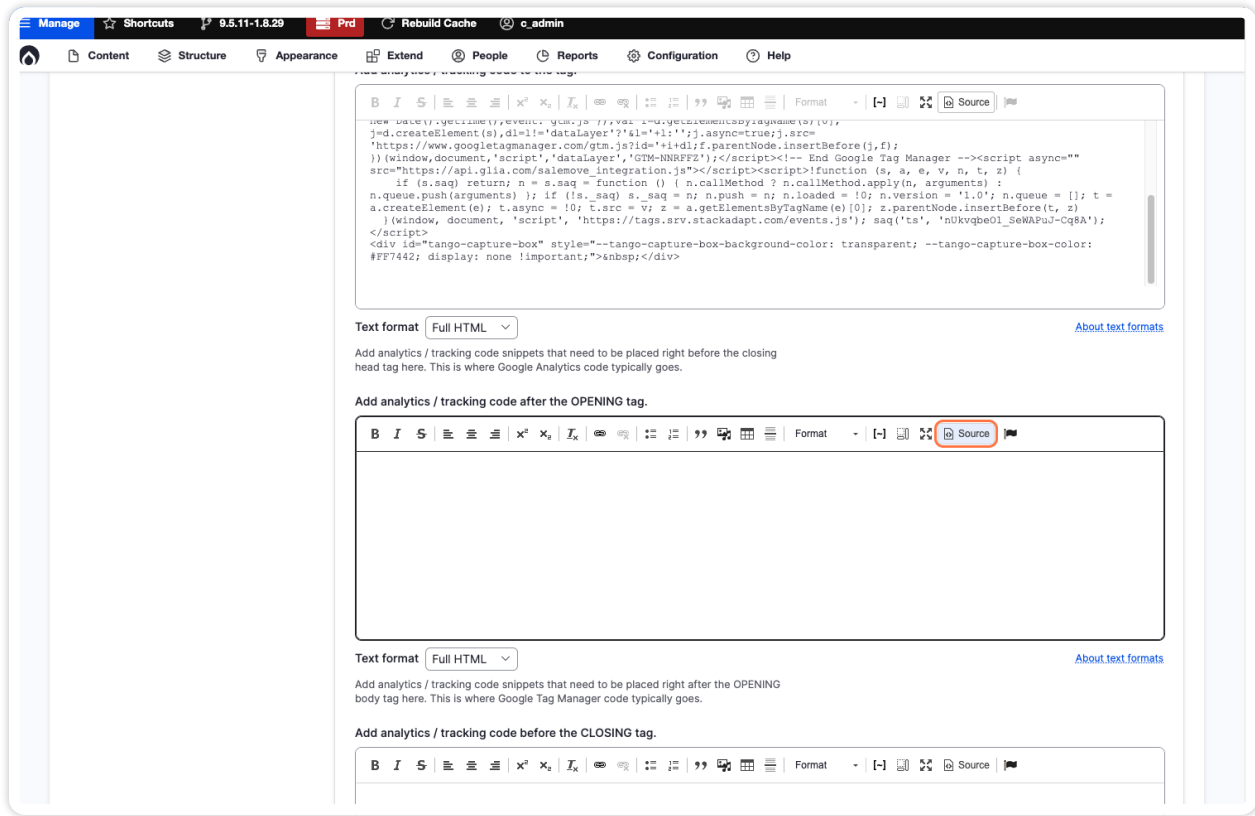
5. Paste in your script. Be careful not to edit any of the existing code that may be there.



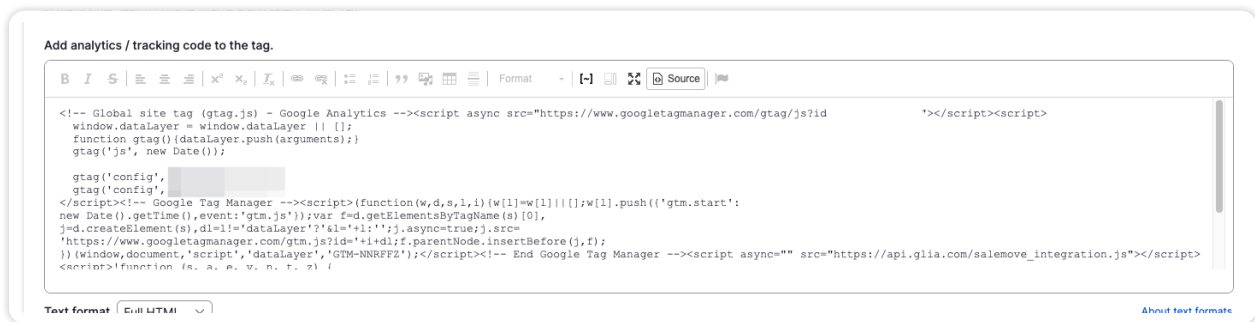
6. For scripts that go at the very beginning of the '<body>' tag, such as Google Tag Manager's '<noscript>' code, go to "Add analytics / tracking code after the OPENING tag." This will apply the script to every page on the website.

The screenshot shows a web editor interface with two text format options. The top option is labeled "Text format" with a dropdown menu set to "Full HTML". Below it is a text area containing the code: `<script>!function (s, a, e, v, n, t, z) {`. Below the text area is a rich text toolbar with icons for bold, italic, strikethrough, bulleted list, numbered list, link, unlink, quote, table, and other formatting options. Below the toolbar is a large empty text area. The bottom option is also labeled "Text format" with a dropdown menu set to "Full HTML". Below it is a text area containing the text: "Add analytics / tracking code snippets that need to be placed right after the OPENING body tag here. This is where Google Tag Manager code typically goes."

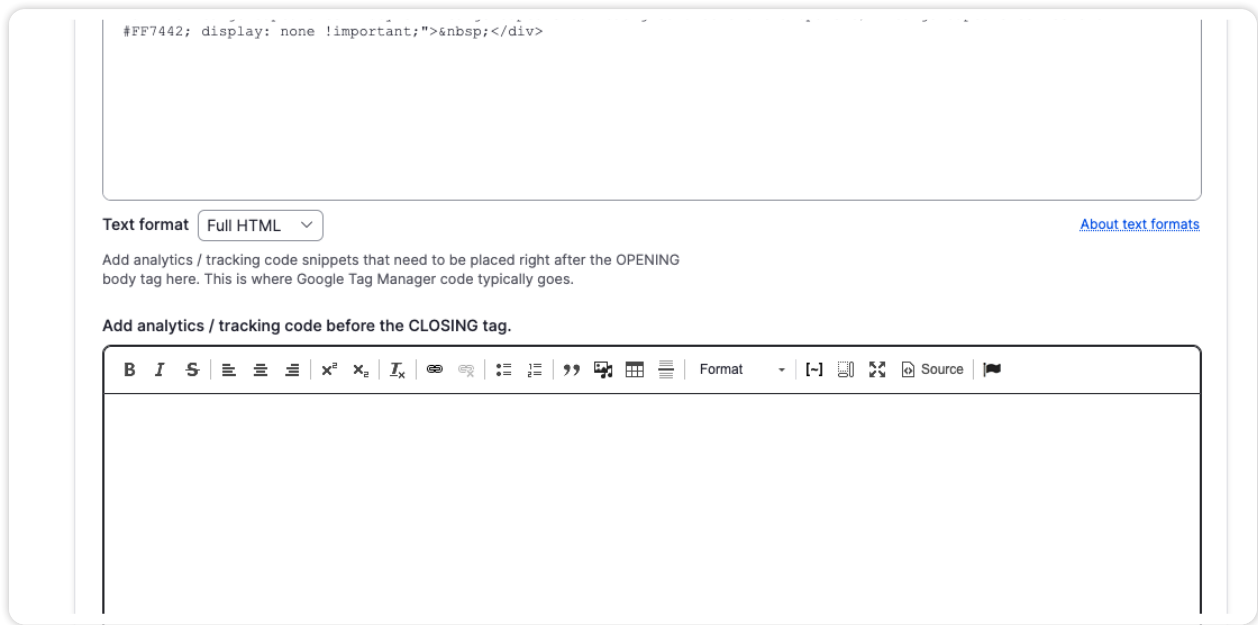
7. Click on the Source button to see the HTML code.



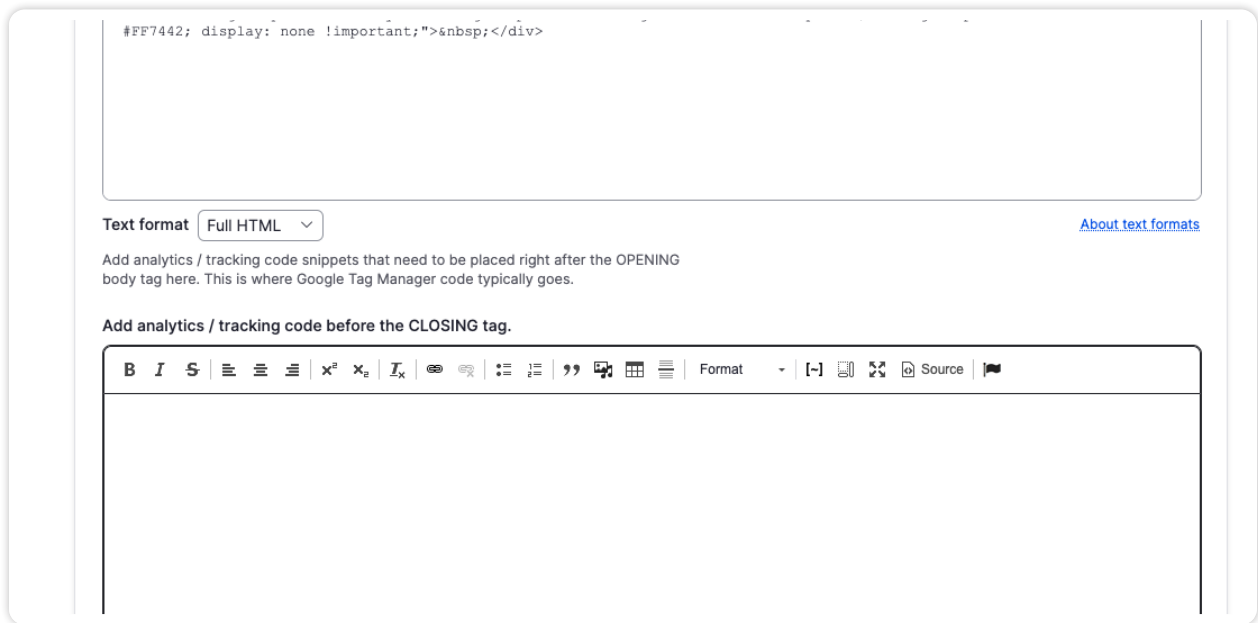
8. Paste in your script. Be careful not to edit any of the existing code that may be there.



- For scripts that go at the very end of the page, ie the '<body>' tag or the '<footer>' tag, go to the section "Add analytics / tracking code before the CLOSING tag." This will apply the script to every page on the website.



- Click on the Source button to see the HTML code.



11. Paste in your script. Be careful not to edit any of the existing code that may be there.

```
<div id="tango-capture-box" style="--tango-capture-box-background-color: transparent; --tango-capture-box-color: #FF7442; display: none !important;">&nbsp;</div>
```

Text format Full HTML

Add analytics / tracking code snippets that need to be placed right after the OPENING body tag here. This is where Google Tag Manager code typically goes.

Add analytics / tracking code before the CLOSING tag.

B I S | **≡ ≡ ≡** | **×** **×** | **↶** | **↷** | **↻** | **↺** | **↻** | **↻** | **↻** | **Format** | **[-]** | **Source** | **]**

```
<p>&nbsp;</p>
```

```
<div id="tango-capture-box" style="--tango-capture-box-background-color: transparent; --tango-capture-box-color: #FF7442; display: none !important; transform: translate3d(8px, 15px, 0px); width: 943px; height: 22.5px;">&nbsp;</div>
```

Text format Full HTML

Add analytics / tracking code snippets that need to be placed right before the CLOSING body tag here. This is where Google Tag Manager code typically goes.

Chapter Four

Accessibility Concerns

In this section:

Text and Image Accessibility

Links and ARIA Tags

Tools

Accessibility Concerns

Trabian has developed your website to be WCAG 2.0 AA conformant. Below are some accessibility items to keep in mind for your website:

- ▶ Image alt text errors
- ▶ Not providing a visual indication of the current focus
- ▶ Failure to use proper labels
- ▶ Non-descriptive text for hyperlinks
- ▶ Link areas are too small
- ▶ Tables markup
- ▶ Improper use of heading elements
- ▶ Color contrast

Accessibility Tools

Below are some automated tools to look for common issues in websites.

NOTE: These automated tools will not catch all issues (e.g., images with embedded text) and may flag issues that are false positives (e.g., empty buttons that users cannot access).

- ▶ **Wave** – WebAIM - <http://wave.webaim.org/>
- ▶ **aXe** – Chrome extension: <https://chrome.google.com/webstore/detail/axe/lhdoppojpmngadmnnindnejefpokejbdd?hl=en-US>
- ▶ **PowerMapper** – <https://www.powermapper.com/>
- ▶ **Functional Accessibility Evaluator** – <https://fae.disability.illinois.edu/>

Text Color Contrast

WCAG 2.0 level AA requires a contrast ratio of 4.5:1 for normal text and 3:1 for large text. Level AAA requires a contrast ratio of 7:1 for normal text and 4.5:1 for large text. Large text is defined as 14 point (typically 18.66px) and bold or larger, or 18 point (typically 24px) or larger.

Check contrast ratio with one of the tools below:

- ▶ **Webaim** — <http://webaim.org/resources/contrastchecker/>
- ▶ **Contrast Analyser** — <https://www.paciellogroup.com/resources/contrastanalyser/>
- ▶ **Text on Background Check** — <http://www.brandwood.com/ally/>
- ▶ **Colors on the Web** — <http://www.colorsontheweb.com/Color-Tools/Color-Contrast-Analyzer>

Images

Avoid creating Images of Text

Text within an image should only be necessary when utilizing a logo or other branded symbol. Images with text cannot be read by screen readers and is one of the easiest ways to make your site non-conformant.

Add Alt Tags to Images


If you do use an image of text, the full text needs to be in the alt tag of the image.

To add an alt tag:

1. **Find your image in the media library.**
2. **Click “Edit” under “Operations”.**
3. **In the appropriate field, “Alternative Text”, add alt text.**
4. **Click “Save”.**

^ Image *

pexels-mentatdgt-937481.jpg (5.44 MB) Remove



Alternative text *

asdadsfasdfasdf

Short description of the image used by screen readers and displayed when the image is not loaded. This is important for accessibility.

Revision information

No revision Create new revision

URL alias

No alias

Authoring information

By c_admin (1) on 2022-07-07

Published

Save

NOTE: Do not add alt tags for decorative elements. Alt tags are *required* for images that are links to allow screen readers to determine the purpose of the link/button.

Text

Avoid Using Text in All Caps

This may confuse screen readers causing them to read some words as acronyms.

“Click Here” links and ARIA labels

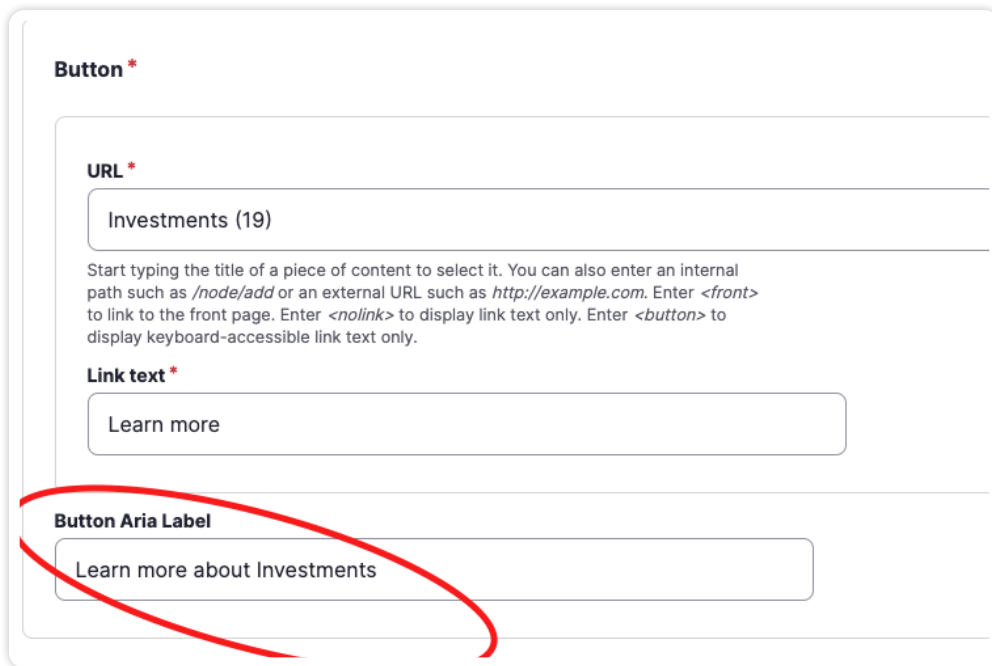
Avoid using “Click Here” or “Learn More” for links and use meaningful text, such as “current

rates” or “view calendar of events.” Using “click here” makes it difficult for screen readers to understand what the link’s purpose is because it does not adequately convey the context of the link. Ensure that link text is unique.

If you must use “Learn More”, you will have to include an aria label. To add an aria label, follow the steps below:


To add Aria labels to buttons, follow these instructions:

1. Navigate to a Button section inside a Banner Item, Grid Item, or Call to Action content sections.
2. Add descriptive text for screen readers in the Button Aria Label field.



The image shows a configuration form for a button. It has three main sections: 'URL', 'Link text', and 'Button Aria Label'. The 'URL' field contains 'Investments (19)'. Below it is a small text block: 'Start typing the title of a piece of content to select it. You can also enter an internal path such as /node/add or an external URL such as http://example.com. Enter <front> to link to the front page. Enter <nofollow> to display link text only. Enter <button> to display keyboard-accessible link text only.' The 'Link text' field contains 'Learn more'. The 'Button Aria Label' field contains 'Learn more about Investments'. A red circle is drawn around the 'Button Aria Label' field.

If you need to add an Aria label directly to the code, here’s some instructions:

1. Once you are in the editor, click the Source button,  Source .
2. Within the a tag, add the text you would like the screen reader to know about the button.

```
<p><strong>Alert:</strong>&nbsp;All branches will be closed on July 4th, in observance of Independence Day.  
<a aria-label="Learn more about our holiday closures" href="#">Learn More.</a></p>
```

3. Click Save once you've updated the code.

NOTE: The text in a button or link MUST be present in the aria label text. For example: if your text says "Learn more," your aria label must read "Learn more about [whatever the topic is]". Using an approximate phrase like "learn even more..." will result in an accessibility error and will negatively affect compliance.

Headings

If it looks like a heading, you should assign a heading tag (e.g., h2, h3, h4). Ensure that the heading level follows logical order (starts with h2, then h3, then h4, as appropriate).

See: <https://webaim.org/techniques/semanticstructure/> and <https://www.w3.org/TR/WCAG20-TECHS/H42.html> for information.

Empty heading and p tags

Because screen readers create a sort of table of contents with the headers on a page, a blank header tag will throw an accessibility error. If you want to add additional space on a page, ensure that you haven't created an empty heading or p tag. While the p tag might not throw an error, it might be confusing to the screen reader as it will try to read the space (e.g.,).

Incorrect:

```
<p>&nbsp;</p> or <h2>&nbsp;</h2>
```

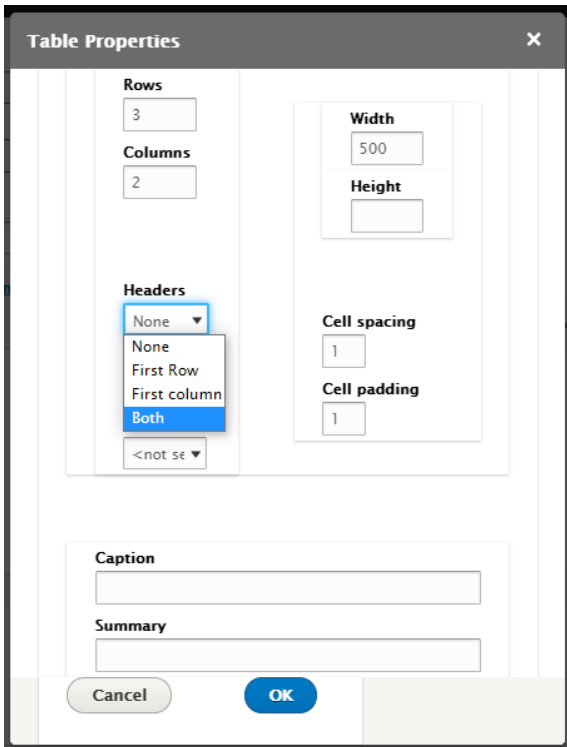
Correct:

```
<br />
```

```
<br />
```

```
<br />
```

Tables



If you are adding a table, ensure that you choose “Both” under the “Headers” drop down to ensure that the correct heading tags are in the table.

Once these header rows are in place, it basically adds scopes in the Source code. You can see how the header rows should be formatted in this example.

```
<thead>
  <tr>
    <th scope="col">Checking</th>
    <th scope="col">Minimum Balance</th>
    <th scope="col">Rate Type</th>
    <th scope="col">Dividend Rates*</th>
    <th scope="col">APY**</th>
  </tr>
</thead>
<tbody>
  <tr>
    <th scope="row">Free Checking</th>
    <td>$0.00</td>
    <td>Variable</td>
```

NOTE: If you need to edit an existing table, we recommend that you create a new one and start from scratch.

Chapter Five

Glossary

Glossary

Alternate Text - Accessibility for screen readers

Captcha - A tool that helps keep out “bots” (malicious computer programs) by providing a simple human challenge, such as a math equation or a series of images the user is required to identify that a robot could not.

CKEditor - This is the name of the WYSIWYG rich text editor which enables writing content directly inside web pages.

CMS - (Content Management System) Your website is built on Drupal, which is a highly customizable content management system.

Font Awesome - An “Icon Typeface” used by Canvas to quickly insert a relevant icon into the content. You can learn more on their website, fontawesome.com.

MIME Type - (Multipurpose Internet Mail Extensions) A method of identifying types of media on the Internet.

Meta Tag - A meta tag is a snippet of HTML code that provides information about a webpage’s content to search engines and website visitors. It is placed in the head section of a webpage and is not visible on the actual page. Meta tags are beneficial to SEO because they help search engines understand the content and purpose of a webpage.

Module - Functionality added to the website that can be turned on and off, or have specific settings.

Thumbnail - A smaller copy of an image or piece of media.

Token - A small line of Canvas-relevant code that can be used to insert a more complex piece of content into a larger body of content.

WYSIWYG - Acronym for “What You See Is What You Get”