



Velonetic

CMS User Manual v2.9

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Version History

Version	Date	Author	Overview of Changes
0.1	29/08/2023	Toni Simpson	Initial creation
0.2	13/09/2023	Toni Simpson	Addition of Dot Digital Embed
0.3	18/09/2023	Toni Simpson	Revisions section made clearer and labelled. This is amending content that is published
0.4	28/09/2023	Toni Simpson	BluePrint 2 additions
1.0	03/10/23	N Abbasi	Review and revisions to URLs
2.0	30/10/2023	Luke Holmes/Jack Holding	<ul style="list-style-type: none"> • Audit • Migrate to Google Doc • General restructuring • Added sections
2.1	15/11/2023	Luke Holmes	Changes from release 1.6.0 including: <ul style="list-style-type: none"> • Media library categorisation • Adding icons to buttons • Linking to media items • Inactive state text • Page last updated stamp • Image resizing/cropping
2.2	29/11/2023	Luke Holmes Cedric Hillion Jack Holding	Changes from release 1.7.0 including: <ul style="list-style-type: none"> • Updates to media library categorisation • Updates to navigation • Added Search section • Updates to feedback button
2.3	5/12/2023	Nic Borda Luke Holmes	<ul style="list-style-type: none"> • Added section on cropping image with text. • Added page numbers
2.4	13/12/2023	Cedric Hillion Luke Holmes Jack Holding	Changes from release 1.8.0 including: <ul style="list-style-type: none"> • Accordion variants • Added rich text button details • Opengraph tagging • Updates to User roles • Updates to Scheduled Content • Updates to Content Cards & Stat Cards • Added List Links component details • Adds description of Section as a parent component • New section navigation component • Breadcrumbs for Velonetic section
2.5	16/1/2024	Luke Holmes Cedric Hillion	Changes from release 1.9.0 including: <ul style="list-style-type: none"> • Hero component • Bulk Media Upload • Accordion column config



			<ul style="list-style-type: none"> • Heading 1 in Rich text • Content card updates • List Link changes • Sharing unpublished content • Downloadable content • Exporting the users' listing • Grid • Timeline button icon
2.6	26/1/2024		<p>Changes from release 1.10 including:</p> <ul style="list-style-type: none"> • Component ordering • Logging in redirect • Hero full width field removal • Media library file type removal • Feedback banner (Velonetic)
2.7	15/02/2024	Cedric Hillion	<p>Changes from release 1.11 including:</p> <ul style="list-style-type: none"> • Site sections • Copy page functionality • Media download link for content cards • Bulk media upload improvements • Stat card suffix • Velonetic hero banner
2.8	TBC	Jack Holding	<p>Changes from release 1.13 including:</p> <ul style="list-style-type: none"> • Two-Factor Authentication (TFA) <ul style="list-style-type: none"> ◦ TFA for CMS Users ◦ TFA Administration
2.9	20/3/2024	Luke Holmes Cedric Hillion	<p>Changes from release 1.x.x including:</p> <ul style="list-style-type: none"> • Secure Access Area • Secure Access Global Settings



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General Information

The following guide will provide CMS users with instructions on how to edit the Velonetic website.

Website Details

Website URL	www.velonetic.co.uk
CMS Platform	Drupal
Version	10
Hosting Provider	Pantheon

Requesting CMS Access

To request access to the CMS you will need to ask an administrator for an account:

For Velonetic, contact Vijay.reed@dx.com

For Blueprint2, contact charlotte.walking@lloyds.com

Logging in to the CMS

Once you have an account, you can log in to the CMS using the following URL:

www.velonetic.co.uk/user/login

Once logged in you will be redirected to the Velonetic home page.

Forgotten Passwords

Please use the [Forgot your password?](#) link on the page to reset your password.

If you have trouble logging in contact the administrators (above)

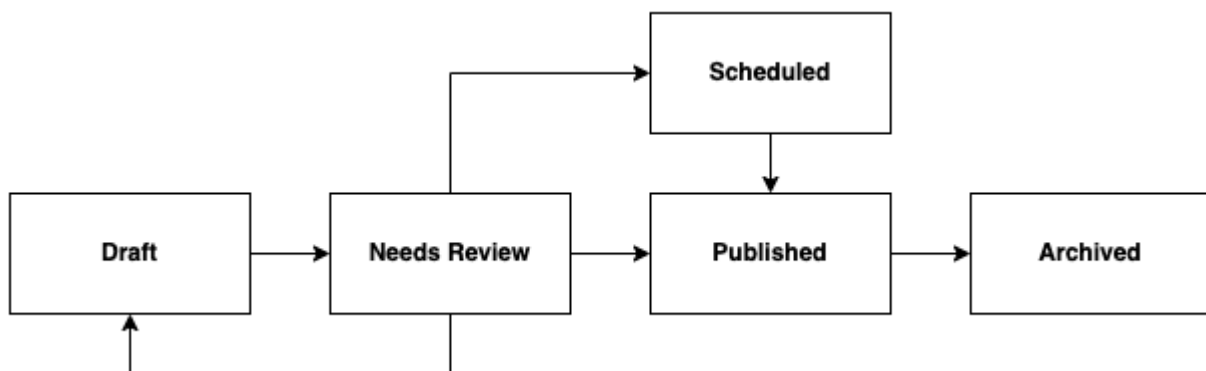


Content Workflow

All pages on the site are created and published via a bespoke content workflow. A page can have one of **five** states as detailed in the table below.

State	Description
Draft	All new content starts in the draft state. Content in the draft state can only be viewed by logged in CMS users.
Needs Review	Content in the needs review state is ready for an administrator to review and approve the page for publishing. It can either be published, scheduled for publishing or sent back to draft with feedback.
Published	Content with a published state is accessible to all users of the website.
<i>Scheduled</i>	Content with a scheduled state is either in draft or needs review state, until it is switched to a published state by .
Archived	Content with an archived state is unpublished and no longer accessible to anonymous users of the site.

Content Workflow Diagram



Users with the **Content Editor** role can only create pages in a **Draft** state, and then change state to **Needs Review**.

Users with the **Administrator** role can then review, schedule and/or publish the pages.

Submitting Content for Approval

When a content editor has finished editing/creating a page they should complete the Revision log message and change the moderation state to **needs review**.

Last saved: Not saved yet

Author: admin

Revision log message ?

Hello, I've added initial content and images and this is ready for review.

Save as: Needs review ▾

Reviewing Content

When an **administrator** logs in they can navigate to **Content > Moderated content**.

This dashboard provides a view of content currently in moderation. Content can be filtered by **Moderation state** to quickly see which content is awaiting review.

Back to site | Administration / Content

Moderated content ☆

Content Comments Files Media

Overview Moderated content Scheduled content

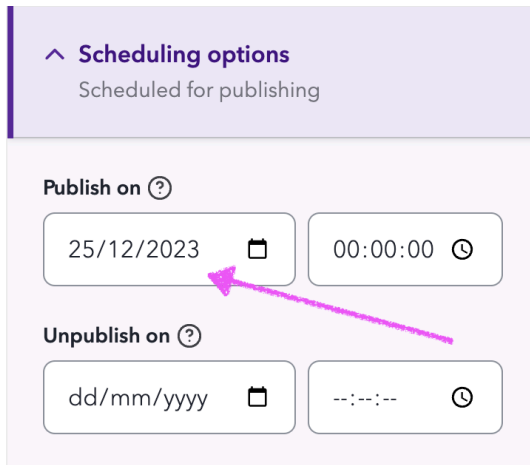
Title Content type Moderation state Language Filter Reset

Title	Content type	Author	Moderation state	Updated	Operations
Joel Test Page	Page	Joel McParland	Needs review	10/13/2023 - 11:38	Edit ▾

From this section the Administrator can view or edit the content, review the revision log notes from the editor, and choose to publish, schedule or return to **draft** state with feedback.

Scheduling Content

An administrator can schedule a page to be published at a given date and time using the **Scheduling options** tab in the right hand section when editing a page.



The screenshot shows the 'Scheduling options' tab in a Drupal interface. It has a sub-header 'Scheduled for publishing'. Below this, there are two sections: 'Publish on' and 'Unpublish on'. Each section contains a date/time input field with a calendar icon and a clock icon. A pink arrow points from the 'Unpublish on' clock icon to the 'Publish on' date input field.

Scheduling options
Scheduled for publishing

Publish on ⓘ

25/12/2023 ⓘ 00:00:00 ⓘ

Unpublish on ⓘ

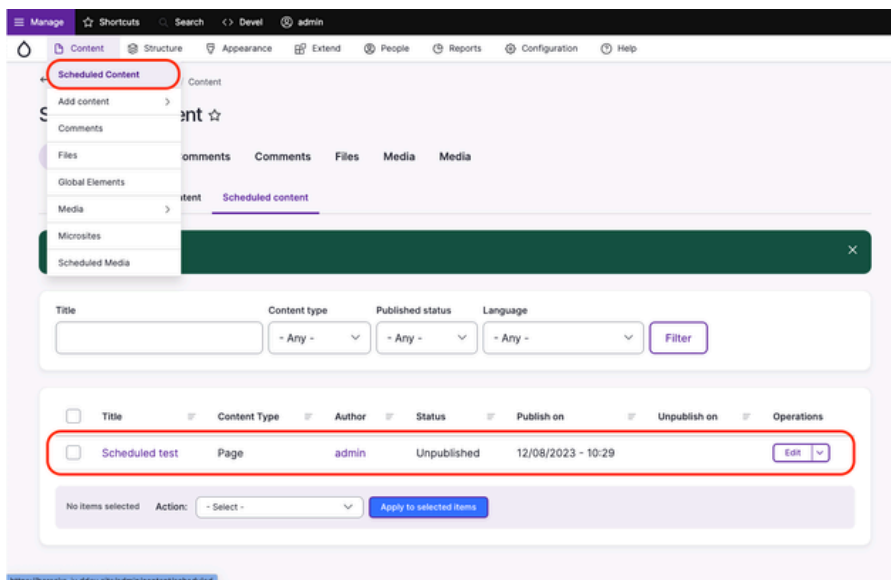
dd/mm/yyyy ⓘ --:--:-- ⓘ

The Drupal cron will run automatically every hour, roughly within 5 to 10 minutes of half past each hour, which means content may be published up to 59 minutes after it is scheduled.

As an example, if content was scheduled to be published at 10:45, the content would not be automatically published until the next cron run, which would be approx. between 11:30 - 11:40.

Content with a particularly sensitive release time should be published manually.

Content scheduled for publishing/unpublishing will appear in the [Scheduled Content admin page](#).



The screenshot shows the 'Scheduled Content' admin page in Drupal. The left sidebar has a 'Scheduled Content' link highlighted with a red circle. The main content area shows a table of scheduled content. The table has columns: Title, Content type, Author, Status, Publish on, Unpublish on, and Operations. A row is highlighted with a red circle, showing 'Scheduled test' as the title, 'Page' as the content type, 'admin' as the author, 'Unpublished' as the status, and '12/08/2023 - 10:29' as the publish time. The 'Operations' column for this row has an 'Edit' button.

Scheduled Content

Content

Add content > Comments Files Comments Files Media Media

Global Elements Content Scheduled content

Microsites Scheduled Media

Title Content type Published status Language Filter

- Any - - Any - - Any -

<input type="checkbox"/>	Title	Content Type	Author	Status	Publish on	Unpublish on	Operations
<input type="checkbox"/>	Scheduled test	Page	admin	Unpublished	12/08/2023 - 10:29		Edit

No items selected Action: - Select - Apply to selected items

Content Revisions

There comes a point when you might need to edit a live page but may not want to publish the changes made straight away.

To do this, edit the page and save it as **draft**. This will not unpublish the version that is already live, but instead creates a new **revision**.

In the screenshot below, the green highlight shows the revision that is live and the one above is new and being worked on.

View

Edit

Latest version

Revisions

Revisions allow you to track differences between multiple versions of your content, and revert to older versions.

Revision	Operations
08/22/2023 - 22:43 by ToniCE	<div>Set as current revision</div>
08/18/2023 - 17:12 by ToniADMIN	Current revision
08/18/2023 - 17:11 by ToniADMIN	<div>Revert</div>
08/18/2023 - 17:01 by ToniADMIN	<div>Revert</div>

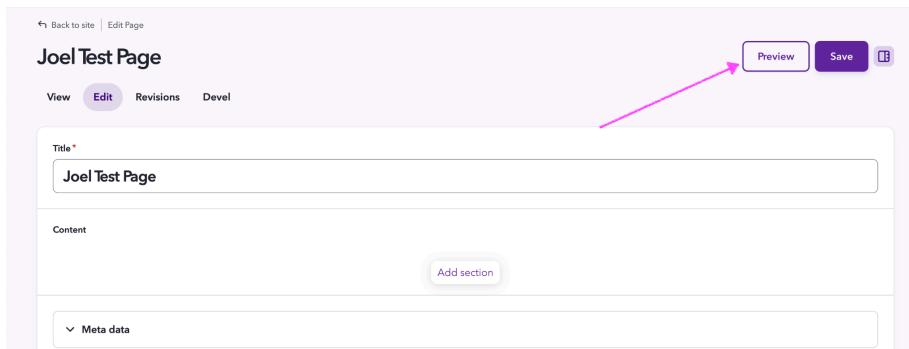
There is also a **latest version** tab which previews the new draft version being worked on.

The **View** tab shows the page that is live.

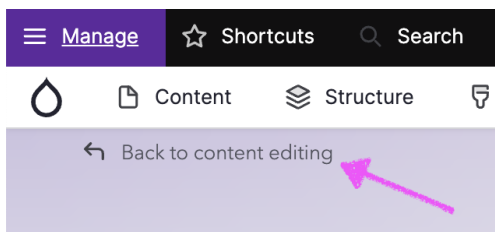
Once you are ready to publish you can either save the page as **published** from the main edit screen or you can set a scheduled publish option (admins only) for the changes to be applied on a certain date.

Previews

When creating pages you have the option to preview the content as it will appear to the end user.



To return to the edit page there is a small link on the top left:



Sharing unpublished content for review by unauthenticated users

It is now possible to share a link to a page that has not been published yet with a user who does not have an account on the website by following these steps:

- Edit a page which has not been published yet; there will be a new dropdown on the right hand side that reads 'Temporary unpublished access',
- Set the desired timeframe you would like to make the share link available for and click 'Generate token',
- Click on 'copy' after the token has been created,
- Save the page,
- Paste the token link that was saved in your clipboard to share it in an email, text message, etc.

Page Types

There are three content types on the site:

Page type	Description
Page	Used for most instances of content on the site, such as home page, about page etc
News Article	<p>This is used for adding news articles to the site. Items of News Article are pulled through into news listing blocks.</p> <p>These pages are built in the same way as the page type, but includes additional metadata information such as tags and short description. This information is pulled directly into news cards on other pages.</p>
Secure Page	Used for building secure pages as part of the secure access area .

Page

From the Home Page you can create Pages by clicking on the **+ Add Content** button.

After selecting **page**, you are presented with a form. Complete each field on the form as necessary to create your page.

The screenshot shows the 'Create Page' form. At the top, there are 'Back to site' and 'Add content' links. The main form area has a 'Title' field, a 'Content' area with an 'Add section' button, and a 'Save as' dropdown menu. The sidebar on the right contains settings for 'Menu settings', 'Meta tags', 'URL alias', and 'Scheduling options'.

Title: this is the page name i.e. About Velonetic

Site section: the section (Velonetic / Blueprint Two) the content belongs to.

Save as: can be **published**, **draft** or **needs review**, depending on user rights

Content: Add content blocks here to build out the page content.

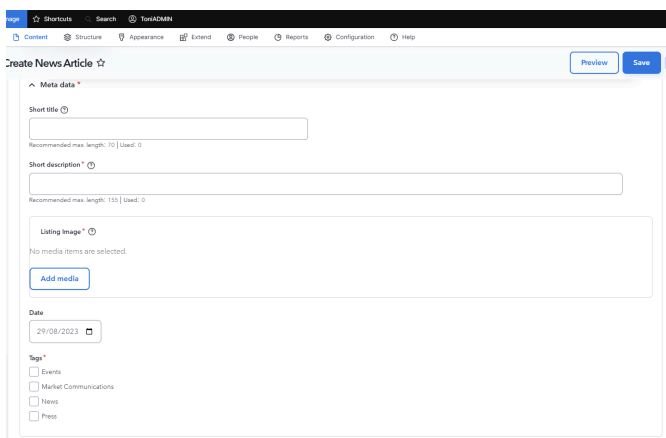


News Article

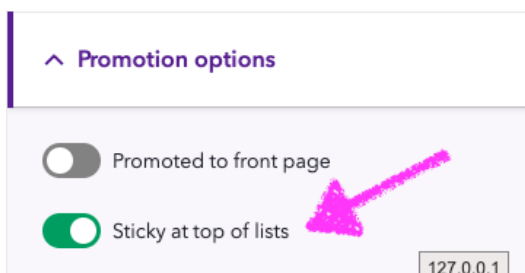
JV & Blueprint Two will be sharing news content via the website. News articles are created in a very similar way to a page.

After creating the title and picking the site section, the initial data entry is for the metadata. This will be used when creating news blocks on other pages and for filtering on the main news article listing page.

Note: The date for the article does not impact when it is published, for this the scheduling option should be used.



To pin a news article you need to use the **Promotion Options** on the right hand side and enable the **Sticky at top of lists** option. This will make sure the article is shown at the top of any listings, regardless of article date.



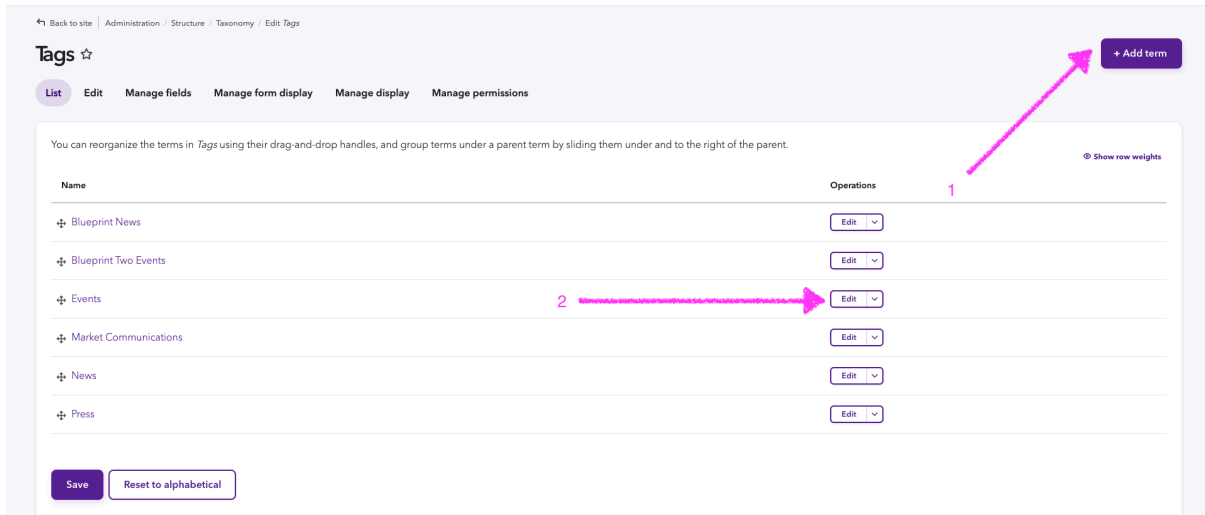
Once a **News Article** page is published it will appear on the News listing page automatically and the metadata added/selected will be applied, i.e. filtering.

The **Promoted to front page** option currently doesn't have any effect.

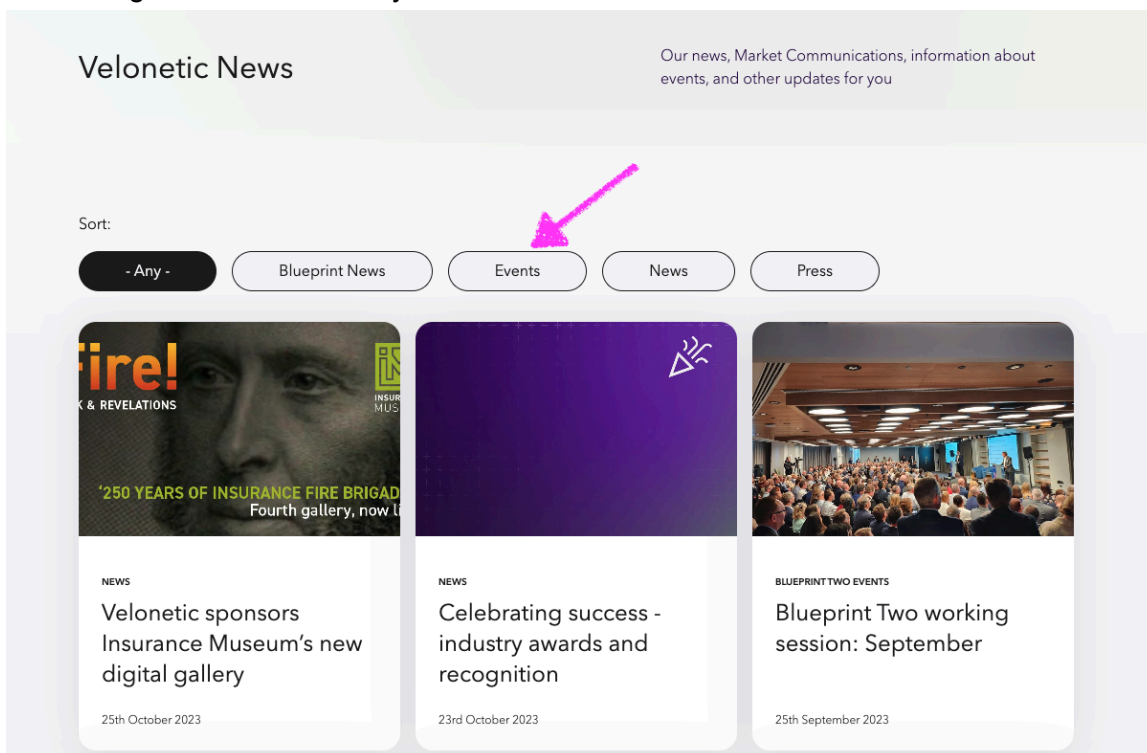
Taxonomy

Taxonomy vocabularies are Drupal's way of categorising content. Currently the only categorisation on the site is News article tags.

Structure > Taxonomy > Tags



1. An editor can add new tags.
2. An administrator can edit existing tags.
3. Tags are used as a way for the end user to filter news content.

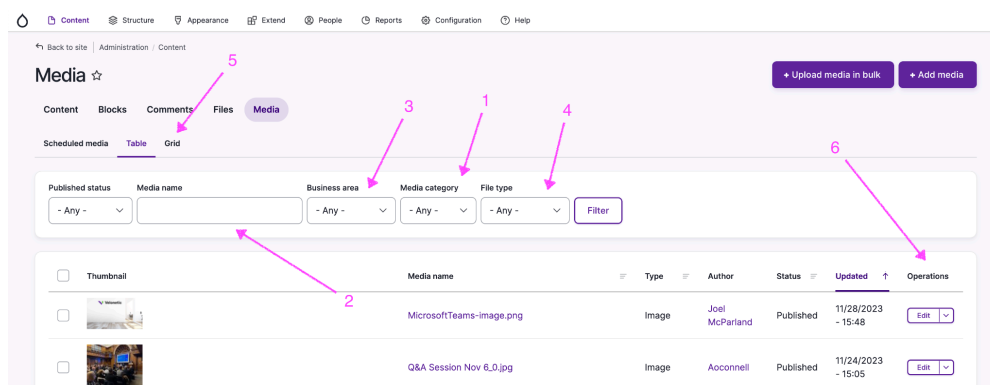


Media Library

The Velonetic media library is a media management tool that enables editors to upload, store and reuse media assets across multiple pages. It allows you to search, sort, and create media items with a robust, easy to use, and customizable interface.

The media library can be access via the navigation menu:

Content > Media



1. The editor can filter by media category
2. The editor can search by media name.
3. The editor can filter by business area (BP2/Velonetic).
4. File type is restricted to Administrator use only, editors will not see this option.
5. Editor can switch between a list view and grid view.
6. Editor can edit/delete items using the operations.

Once a media item has been uploaded to the media library, it can be used in multiple content blocks across the site. If the editor uploads a new piece of media for a content block, this will automatically be stored in the media library and available for re-use.

Media Categorisation

When adding assets to the media library, editors can tag the asset with a **Media category** and a **Business area**. This allows editors to filter and find media items by these categories.

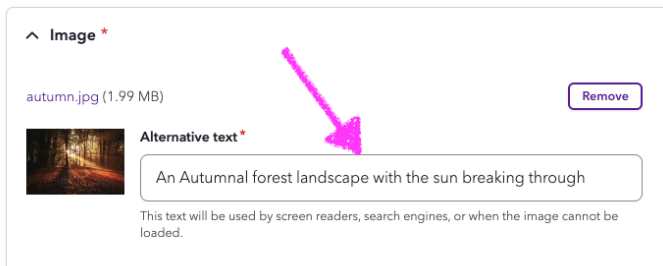
Media category and Business area categories can be managed here:

- https://www.velonetic.co.uk/admin/structure/taxonomy/manage/business_area/overview
- https://www.velonetic.co.uk/admin/structure/taxonomy/manage/media_category/overview

Alt / Title Text

When adding images to the media library, editors should always add an appropriate alt text for the image. Guidance for alt text can be found here:

<https://blog.hubspot.com/marketing/image-alt-text>



Downloadable content/document upload

When adding a document to the Media library, there is now an option to alter the link text so that the file name is overridden.

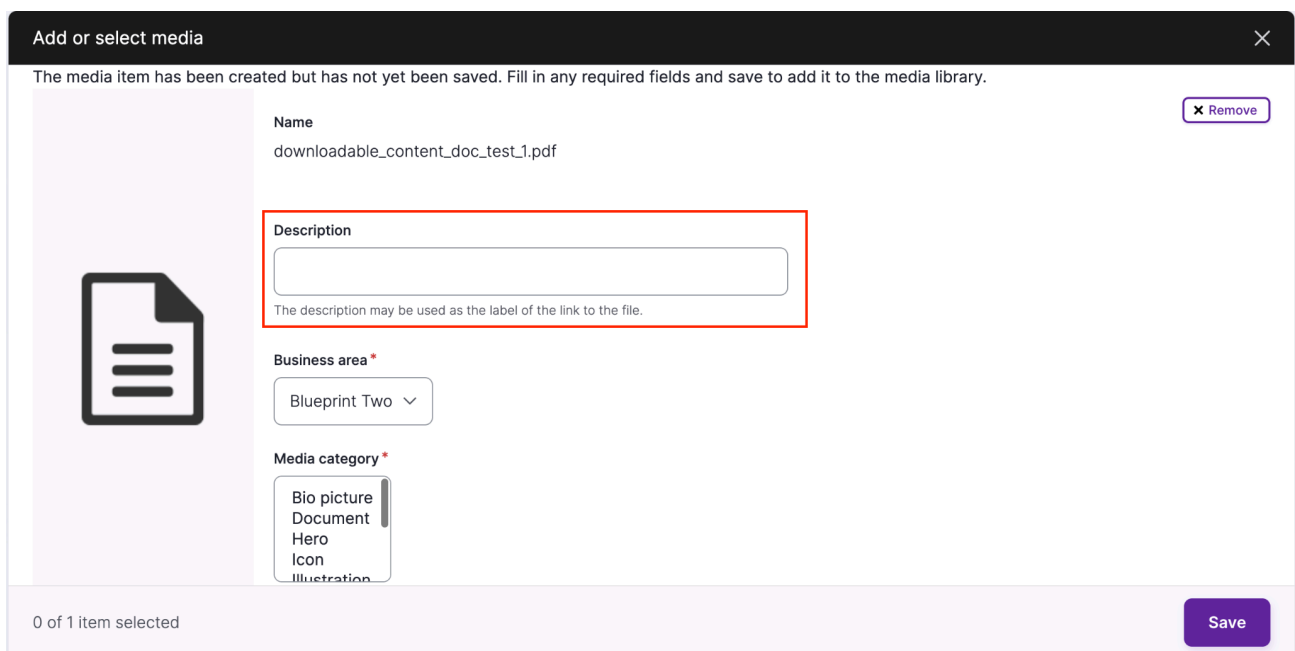
A screenshot of the HubSpot 'Add or select media' dialog. The dialog has a dark header with the title 'Add or select media' and a close button. Below the header, a message states: 'The media item has been created but has not yet been saved. Fill in any required fields and save to add it to the media library.' On the left side, there is a large document icon. On the right side, there are several form fields: 'Name' with the value 'downloadable_content_doc_test_1.pdf' and a 'Remove' button; 'Description' with an empty text input field, which is highlighted by a red rectangle and has a note below it saying 'The description may be used as the label of the link to the file.'; 'Business area *' with a dropdown menu showing 'Blueprint Two'; and 'Media category *' with a dropdown menu showing 'Bio picture', 'Document', 'Hero', 'Icon', and 'Illustration'. At the bottom left, it says '0 of 1 item selected'. At the bottom right, there is a 'Save' button.

Image Cropping

When uploading or editing images, the editor has the option to apply crop positions for a defined list of image styles. This ensures that for images that have a specific focal point, the editor is able to ensure the relevant part of the image is shown on the front end.

If the user doesn't select any cropping, the image by default is cropped around the centre point of the image.

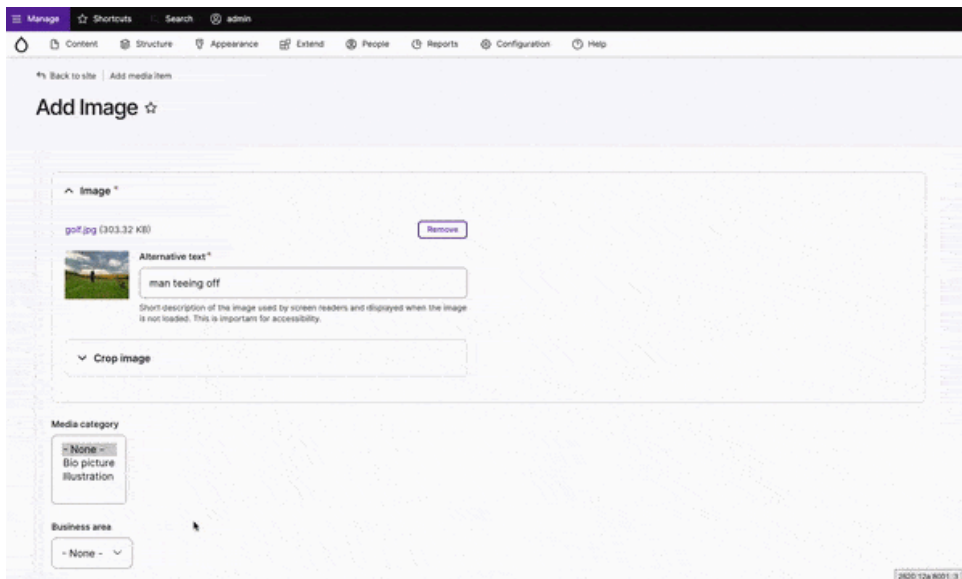
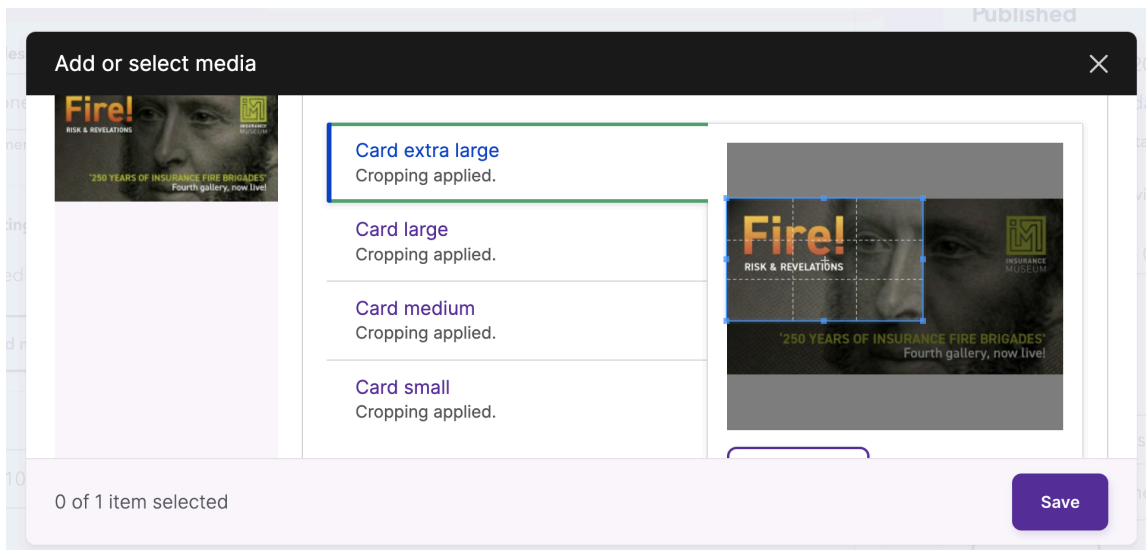


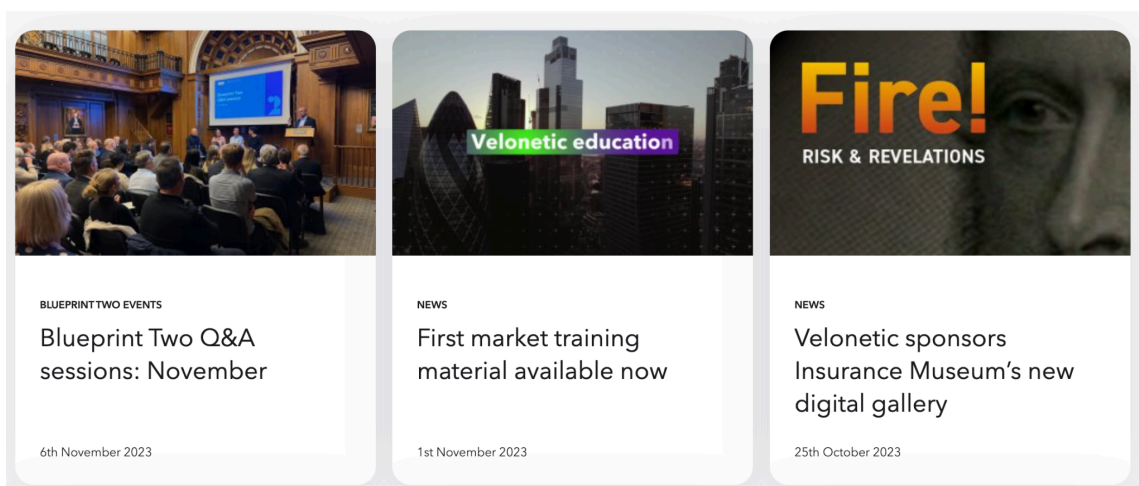
Image Cropping for images with text

Sometimes an image will have text and in order for that text to not appear to be cut off in the image we can apply some cropping for the different breakpoints where the image changes in size and crop.

When uploading the image with text the editor must make sure that every crop made does not cut off any text for every breakpoint crop.



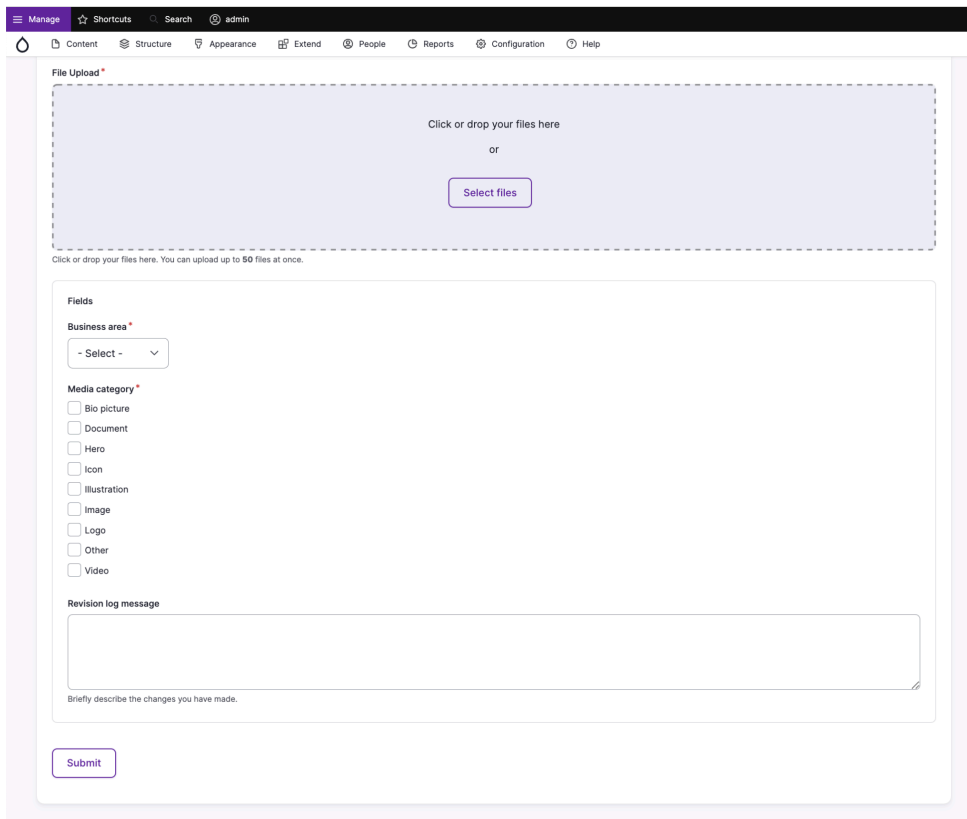
After the crops are made an editor can validate the crops have been applied on the different breakpoints.



Bulk Media Upload

The CMS allows editors to upload media in bulk. This feature can be accessed via the admin menu:

Content > Media > Bulk Media Upload



The screenshot shows the 'Bulk Media Upload' form in the CMS admin interface. The form is titled 'File Upload' and has a dashed border. Inside the form, there is a large light blue area with the text 'Click or drop your files here' and 'or' below it. A 'Select files' button is located in the center of this area. Below the file upload area, there is a section for 'Fields'. The 'Business area' field is a dropdown menu with '- Select -' as the current selection. The 'Media category' field is a list of checkboxes with the following options: Bio picture, Document, Hero, Icon, Illustration, Image, Logo, Other, and Video. Below these fields is a 'Revision log message' text area with a placeholder text 'Briefly describe the changes you have made.' and a 'Submit' button at the bottom left.

Required steps

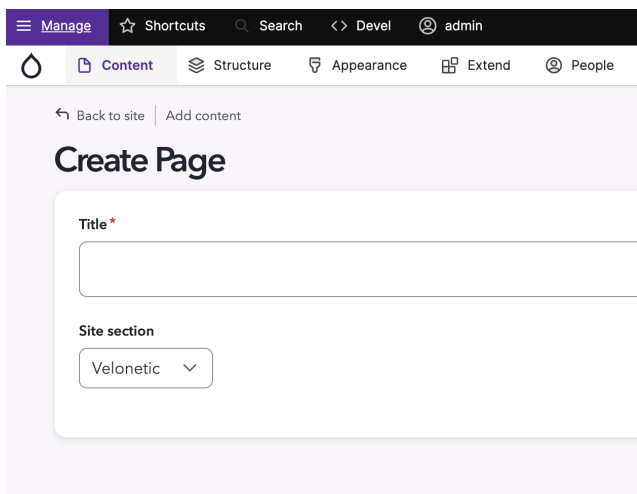
1. Click on the **Select files** button to choose your media items from your computer. Alternatively you can drag and drop multiple files onto the **File upload** field.
2. Fill out the **Business area** and **Media Category** fields. Note that the options you select here will be applied to all of the items added above.
 - a. It is therefore best practice and most efficient to upload items of the same business area and category.
3. **Optionally** add a **Revision log message** and click submit.
4. The editor will now be unable to save the media until the bulk upload has been completed
5. On completion the items will have been uploaded to the media library and be available for use across the site.
 - a. You can edit or update these individual items by locating them in the media library: www.velonetic.co.uk/admin/content/media

Theme Switching / Site Sections

The website supports switching themes at a page level. This allows for individual pages to be assigned the JV or Blueprint2 visual styling.

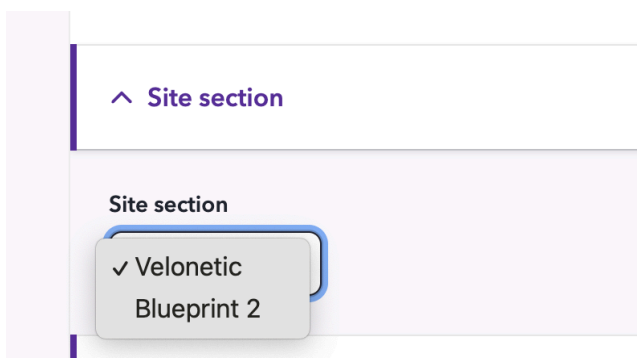
Site Sections

The site section will now be set when creating a new piece of content. The editor will be presented with a first page where they will need to enter the title for their content and the site section it belongs to (see below).



The screenshot shows the 'Create Page' form in the admin interface. The top navigation bar includes 'Manage', 'Shortcuts', 'Search', 'Devel', and 'admin'. Below the navigation bar, there are tabs for 'Content', 'Structure', 'Appearance', 'Extend', and 'People'. The 'Create Page' form has a 'Title' field with an asterisk indicating it is required, and a 'Site section' dropdown menu currently set to 'Velonetic'. There are also links for 'Back to site' and 'Add content'.

This can still be amended when editing the content. The editor can select the **Site section** within the right hand sidebar. (see screenshot below).



The screenshot shows the right-hand sidebar of the editor. It features a 'Site section' dropdown menu with a chevron icon. The dropdown menu is open, showing two options: 'Velonetic' (which is selected and has a checkmark) and 'Blueprint 2'.

Adding a new theme

The below steps will only need to be completed if a new theme/section is added to the site. Although adding the site section can be done within the CMS, this is only a small part of the process to add a new theme. It is recommended that new themes/sections should be requested through TPXimpact.

In order to utilise a new theme, an associated **site section** page must be created to enable other pages to be associated with it. This can be done by navigating to **content > add content > Site section** via the admin menu.

The user then creates the section and populates fields with required data. Note that this has already been completed for the Blueprint 2 section.

Editing an existing site section

Each site section has a default front page field in the backend. The value added here determines the page the custom theme's logo points to.

For example, the Blueprint two page logos point to the Blueprint two home page.

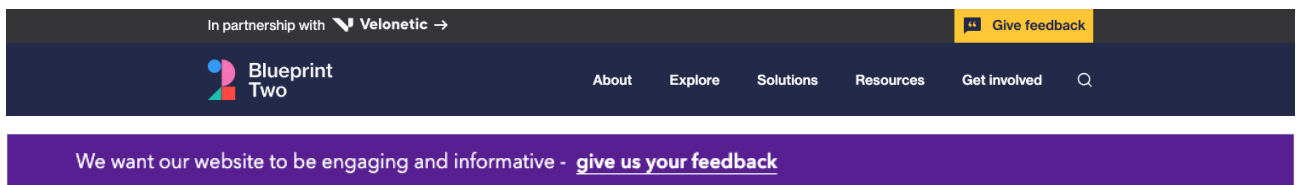
<https://www.velonetic.co.uk/blueprint-two>

The screenshot shows the 'Edit Site Section' interface for 'Blueprint 2'. At the top, there is a breadcrumb trail: 'Back to site' > 'Edit Site Section'. The title 'Blueprint 2' is displayed prominently. To the right of the title, there is a 'Published' toggle switch (which is turned on), and buttons for 'Preview', 'Save', and a settings icon. Below the title, there are tabs for 'View', 'Edit' (which is selected), 'Revisions', 'Children', and 'Devel'. The main form area contains three fields: 'Title*' with the value 'Blueprint 2', 'Site theme' with a dropdown menu showing 'Blueprint 2', and 'Front page (Home)' with a text input showing 'Homepage (291)' and a search icon.

Global Elements

Feedback Banners

There are certain content elements that appear across the site globally. An example of this is the Blueprint Two feedback button in the header, and the Velonetic version in the footer.



The feedback banner copy for both Velonetic and Blueprint Two can be managed in the CMS via the navigation menu:

Content > Global Elements

1. Select the Feedback banner tab.
2. Edit copy as needed.
3. Click the Save button.



Search

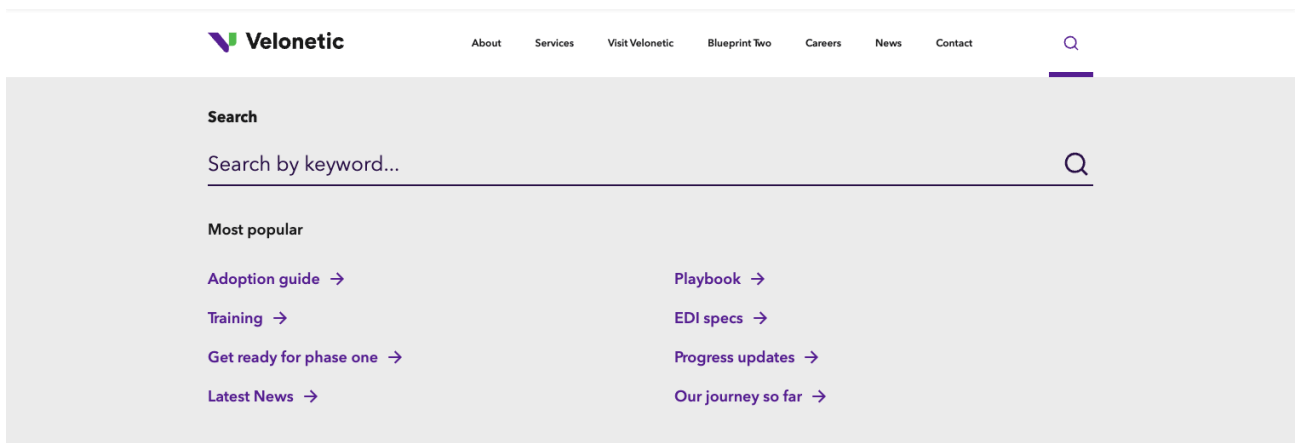
The search results page for both Velonetic and Blueprint Two can be found at the following URL:
<https://www.velonetic.co.uk/search>

The user is presented with the relevant theme based on the part of the site they initiated the search from. This is achieved by using URL parameters.

For example, the Blueprint2 search results page will always have the **?theme=blueprint2** parameter.

Popular Searches

Within the CMS it is possible to define a list of popular searches. These are displayed underneath the search bar in the header, and on the search results page (when there are no results available)



The list of popular searches are shared between Velonetic and Blueprint Two. Although they will appear differently, the links will be the same.

These can be configured via the navigation bar:

Content > Global Elements > Search

or via direct link:

<https://www.velonetic.co.uk/admin/content/global-elements>



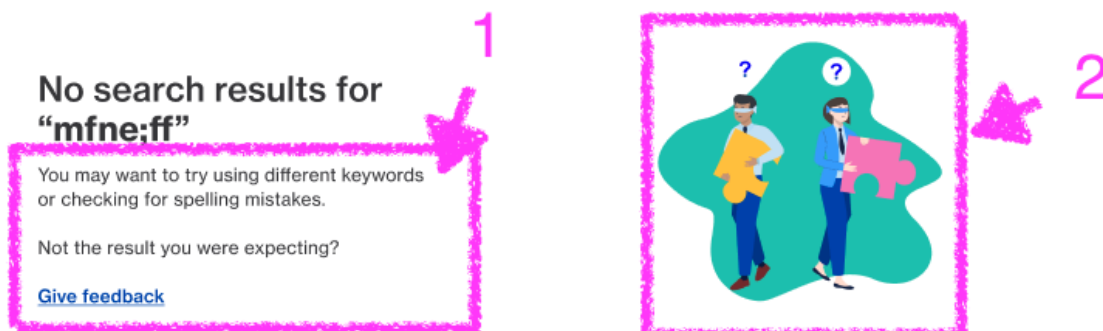
No search results content

The content that is shown on search results pages with no results can be customised within the CMS at the following location:

Via admin menu: **Content > Global Elements > Search**

Direct link: <https://www.velonetic.co.uk/admin/content/global-elements>

1. No results copy
2. No results image



Secure Access settings

These allow for the customisation of the copy in various pages and forms displayed in the Secure Access area of the site.

User messages

403 Page (logged in)

This message is displayed to users who are logged in as a secure access user but who can't access the page in question.

403 Page (logged out)

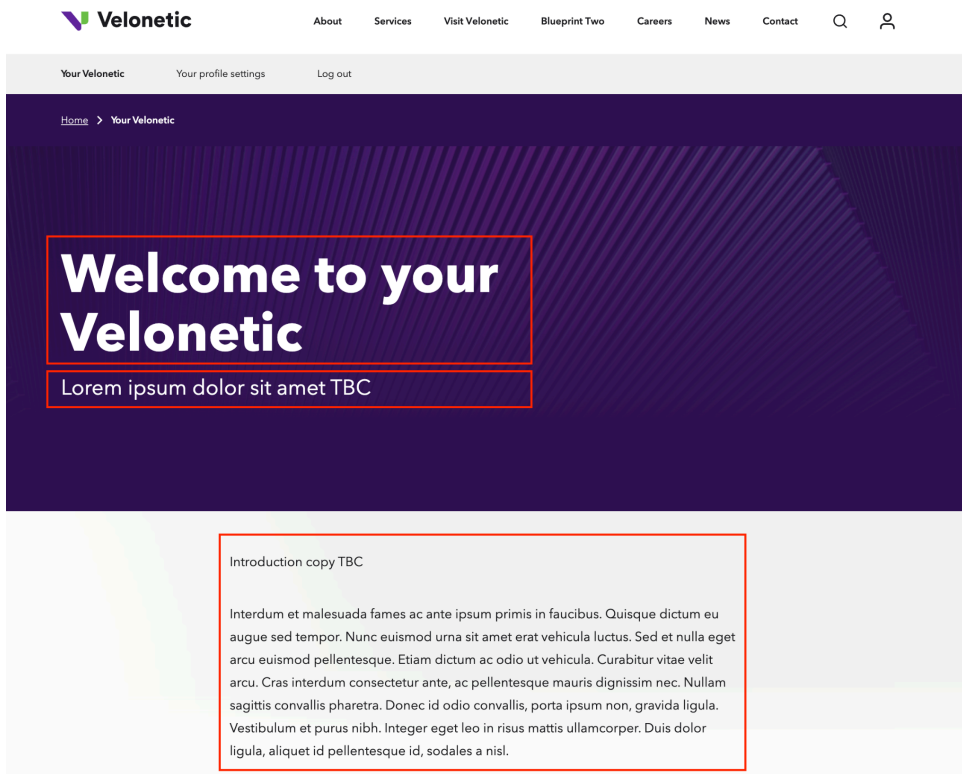
This will be displayed to users not logged in as secure access users trying to view a secure page.

User Profiles

Copy text displayed at the top of the secure access user account page.

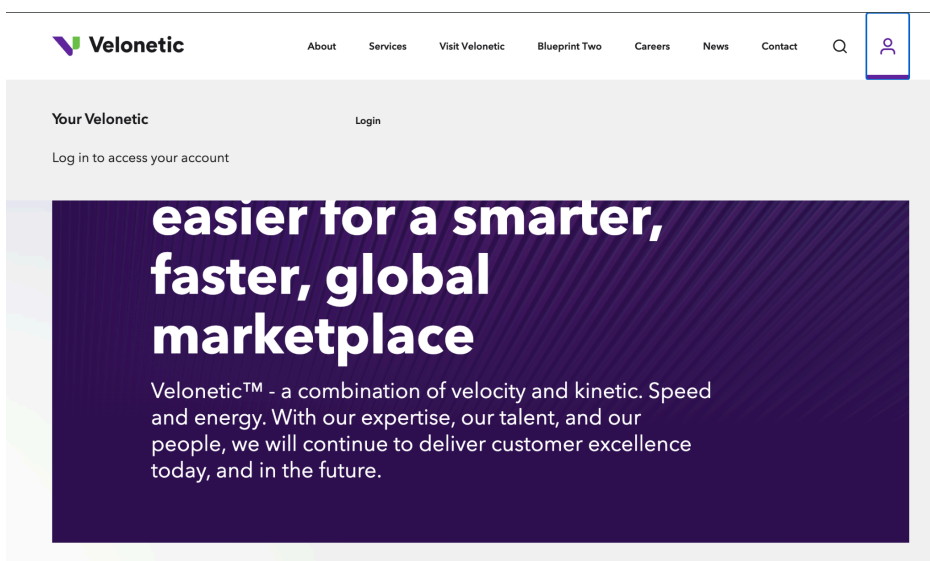
User dashboard

This is displayed on the secure access user dashboard page (/your-velonetic).




Navigation dropdown

This allows for editing the content of the dropdown menu triggered by a click on “login” in the main menu.



Terms & Conditions

Use this to amend the copy of your T&C page (displayed when a newly registered user logs in).



Terms and conditions

Please review and confirm your acceptance of the terms and conditions relating to the use of Velonetic's 'Resources' provided in your account.

Please check the following option

☐ By ticking this box, you confirm that you have read, understood, and accept our terms and conditions.

*

Confirm

Content Blocks

Each page on the site is built using a combination of content blocks within a parent component called Section.

Section

The section component is a “wrapper” for one or multiple content blocks. It provides various options to help with specific layouts and spacing of the elements within it.

- **Variant:** this is where you can decide if you would like to split your content in 1, 2 or 3 **columns** of equal width (the columns then stack up on mobile devices),
- **Rows:** you can add multiple rows to a section
- **Display as a grid:** this settings adds borders between the different cells of a grid defined by columns variant and rows (needs to be used with **Column Gap Horizontal** and **Column Gap Vertical** as “none” for a visual grid effect),
- **Width:**
 - The “content” option restricts the width of the contained element so as to make it more easily readable on screen. This would be ideal for a simple rich text component,
 - The “container” option restricts the width to the normal width of the website content. It is the “standard” option,
 - “Full” means that the included content will cover the full width of the browser. This is perfect for a Hero banner, for example.
- **Fill:** this changes the whole background of a section to white or grey. As a result, it will also dictate the background colour of card components included within the section (for example, a grey section background will render cards with a white background),
- **Column Gap Horizontal:** this determines the horizontal spacing between the section columns (if more than one). Setting this to “none” in combination with “Display as grid” is necessary for a visual grid display,
- **Column Gap Vertical:** this determines the horizontal spacing between the section rows (if more than one). Setting this to “none” in combination with “Display as grid” is necessary for a visual grid display,
- **Padding top** and **Padding bottom:** this is to adjust the padding between sections.



Content Block List

A summary of the content blocks are shown in the table below. More complex content blocks will also have a page with additional guidance.

Name	Description	Visual
Stat Card	Displays some information quickly on the page. These can be placed in 1/2/3 column set up and will resize to fit the available container width	View
Hero	Appears on the top of pages and can consist of an image, heading, paragraph text and a button. There are two different banners, one for JV and one for Blueprint 2	View
One Column Expertise	This is a block of text that spans the content width of the page with JV branded colours behind the text. Only used on the home page and only for Velonetic	View
Content Card	Displays content with icons, copy and buttons. These can be placed in 1/2/3 column set up and will resize	View
Bio Card	A card showcasing talent, with an image, name, job title, linkedin bio	View
Downloadable Content	For PDFs and other files available for download	
Secure Documents	For secure PDFs and other files available for download. This component is used exclusively on secure pages with any files uploaded being stored in a private directory.	
Timeline Horizontal	A small component block to add onto pages to drive people to view the detailed vertical timeline	View
Timeline Vertical	This is the news card block (name change required) this block can be used on any page to share news content	View
Rich Text	A block to place rich text	View
Content Reference	This is the news card block (name change required) this block can be used on any page to share news content	View



(News cards)		
Content Listing	This is the block on the News listing page which automatically populates when news article pages are created. This should not be used except on the News page	View
Video	Allows you to share a video from YouTube. This can be placed in a 1 or 2 column layout	View
Image	Display an image in either 1 or 2 column layout. There is the option to say this is 'Interactive' which allows the user to zoom in and move around a complex image. Not available for JV	View
News Ticker	For use on JV home page to showcase latest news. Automatically populated	View
Embed	This is used to embed external content onto the site. For example Dot Digital form embeds	
Accordion	The ability to hide/show content to prevent page scroll	View
Carousel	Displays images and content that can be scrolled through with pagination	View
Table	Ability to add basic layout tables onto a page	View
Divider	Simple component that displays a dividing line. Used to help visually separate sections of content	View
Call to Action	Displays a label, title, description and button to a page	View
Image & Text	Displays an image alongside some text.	View



Hero

The hero banner should be used at the top of pages to provide initial context to the page. See the below table for details on the fields that can be included in a hero component. The width of the hero image will depend on the width of the section it is added to.

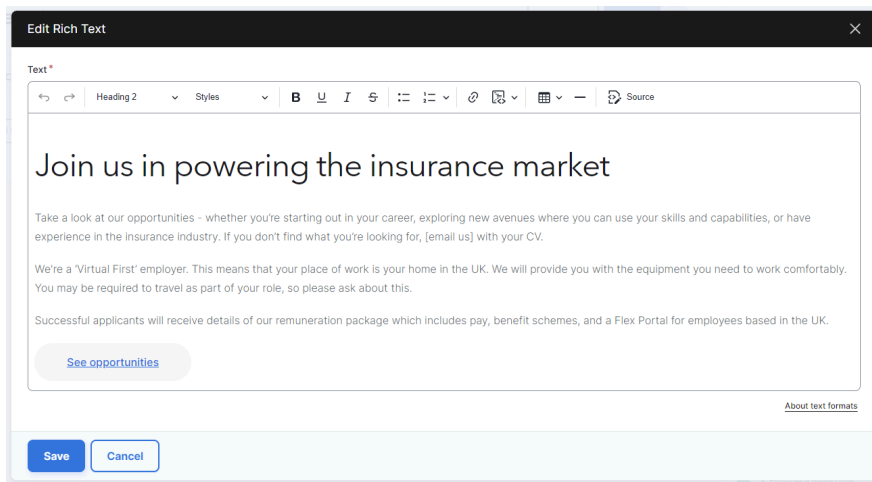
Field	Theme	Description
Image	Blueprint Two	An image to be used as the background of the hero component.
Heading	Shared	Heading text
Text	Shared	Copy to accompany the heading text.
Heading tag	Shared	Option to determine whether the heading field is rendered as a h1 or a h2. Styling will not change, but the HTML element type will. For optimal SEO every page should include only one h1.
Button	Velonetic	A link and link text, which renders as a clickable button directing users to other pages.
Style	Velonetic	Allows for a choice of Hero background (a “dark” version called “Image and purple gradient” and a “light” version called “Soft gradient”).
Background colour	Blueprint Two	Determines the background colour for the hero component. This only shows if an image is not provided.
Text colour	Blueprint Two	Determines the text colour of the hero component. Care should be taken to ensure suitable contrast is chosen between the background and text colour.
Status tag	Blueprint Two	A status field, which is rendered beneath the hero heading and text.

Rich Text Block

This should be used for paragraph style information, you can select header/paragraph styles, bullet lists, number lists, Bold/Italic and view the source markup. Formatting is carried through to the block.



Each page on the website should only contain one **heading 1**. Whilst a heading 1 can be added to any rich text component, it is the responsibility of content editors to ensure that only one heading 1 is used on any given page.



Buttons and Hyperlinking

Text Link: Highlight the required text and click on the paperclip icon. A pop up will be displayed. Within this popup, enter a page name to link to (from within the site, the page needs to have been created already). If the link is external enter the full https://URL.

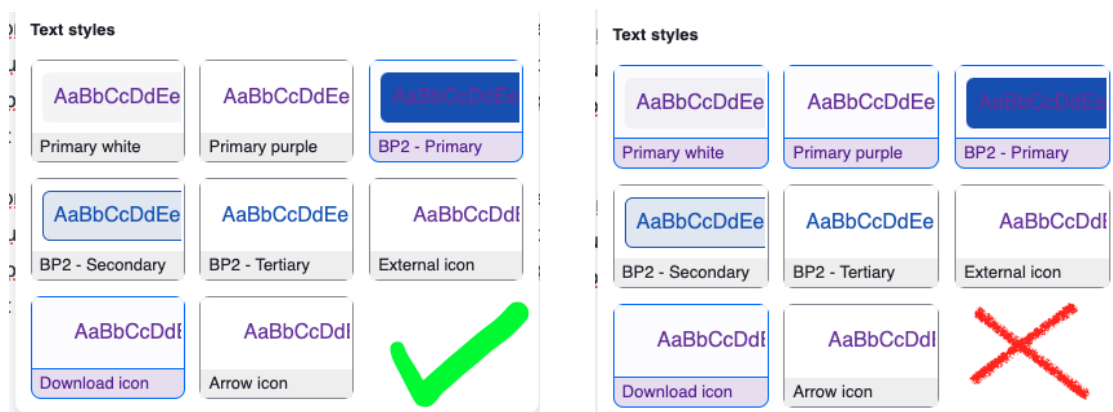
Media Link: Highlight the required text and click on the paperclip icon. A pop up will be displayed. Within this popup, enter a media name to link to (from within the site, the media needs to have been created already). Media are grouped by “bundle” (type) so as to make it easier to find the right one. The link will open and show the media in a browser’s window, where it can be downloaded. It is also possible to save the media straight from the website page by right clicking on the link and selecting “Save link as...”.

Button Hyperlinks:

- Create the hyperlink on the text first as described above.
- Highlight the text and under **Styles** select the button type required.

Styles show the different text options, i.e. Purple for Velonetic. Blueprint Two styles are prefixed with BP2.

You should only select one button style at a time, do not combine a primary and a secondary style. You can however combine a primary or secondary style with an icon style.



Copy and Paste

If you are entering text from a word document into the CMS it is advised to paste the information in with no formatting. When you have the rich text editor on screen instead of Ctrl + V right click and select 'Paste as plain text'. This removes any formatting from the original document for you to then add in the rich text editor.

Accordion

Accordions can be used across the site to reduce the page scroll where there are long items of text/components. Accordions can be used with any content type, and within the timeline component where additional content is added. Accordions can be set to be open or closed on initial page load.

Other content blocks can be added inside the accordion container. There are two variants of the accordion component as described below. The variant can be determined by the **Accordion type** field.

Accordion type *

Default ▼

Choose whether the accordion is styled with the default styling, or the updated design pattern with a defined title.

Default

The default variant shows a short preview of the accordion components, which is faded out before a **Show more** link is provided for the user to open/close the accordion. Note that for the default variant, the **Accordion title** field is not used.

Default accordion dolor sit amet, consectetur adipiscing elit. Ut suscipit congue mauris, eget pulvinar neque blandit non. Nam id molestie ipsum, non ornare risus. Donec tempor iaculis placerat. In posuere varius enim. Aenean ullamcorper purus urna, nec porta erat feugiat id. Etiam et dolor et turpis iaculis posuere nec id nibh. Maecenas viverra dignissim nibh, vel aliquam dolor molestie at.

Show more ▼

Titled

The titled variant shows a user defined title alongside a **Show more** link, which expands the inner contents of the accordion.

This is the new style accordion with a title.

Show more ▾

In the titled variant, the editor enters a value into the provided **Accordion title[1]** field. In order to show the titled variant, the editor has to select the **With title** option in the **Accordion type[2]** field.

Edit Accordion

Accordion type *

With title ▾ 1

Choose whether the accordion is styled with the default styling, or the updated design pattern with a defined title.

Accordion title

This is the new style accordion with a title. 2

Column Configuration Within Accordions

It is possible to add columns within an accordion component by using the section component. Add an accordion component, and within the **Accordion components** field, enter a **Section** with your desired column configuration. You can then enter additional elements within the columns.

Create new Accordion

Accordion type *

With title ▾

Choose whether the accordion is styled with the default styling, or the updated design pattern with a defined title.

Accordion title

Accordion example

Initial state *

closed ▾

Choose the default state of the accordion when it first loads on the page.

☐ Is minimal?

Select this to only show the "Show more" link, and no preview of the accordion content.

Accordion components *

Section

Column 1

Column 2

Column 3

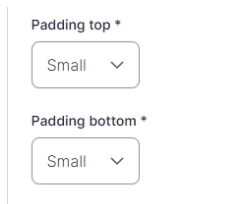
Save Cancel

Bio Cards

These cards allow you to display employee information including name, photo, linked in bio etc.

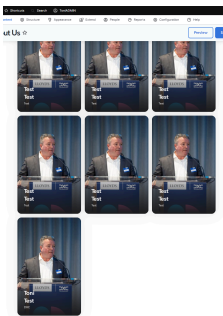
Each row of three cards will need to be in their own 'section'. This will allow you to only add 1 or 2 cards vs all three. *If you try and add multiple rows in one section with only 1 or 2 cards in a row the alignment is thrown out.*

When creating the **section** select the **3 column variant**. You will also need to change the **Padding top** and **Padding bottom** to be small. This will pull the sections closer together so it looks like one section. On the last section leave the bottom padding as default.



The image shows a configuration panel for Bio Cards. It has two sections: 'Padding top *' and 'Padding bottom *'. Each section contains a dropdown menu with 'Small' selected and a downward arrow icon.

The below shows three sections together allowing for one row to hold only one card.



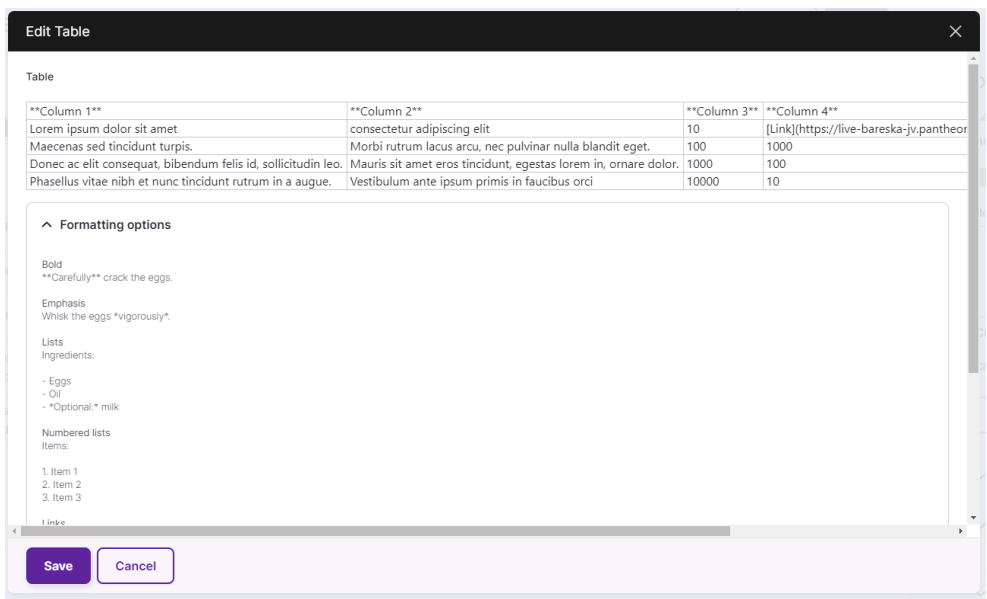
Bio cards for Blueprint Two do not have the ability to turn over, all content is on the front.

Table

There are two ways to add tables, one is within the rich text editor but this has limited styling associated to JV.

For Blueprint Two there is a new Table component, although this is basic and requires time to customise. The CMS editor will need to right click on the table to add/remove columns and rows.

To format items i.e. Bold, numbered lists the user will need to look at the formatting options and add the required special characters. A later enhancement should be added to the backlog to make this process easier for the CMS editor.



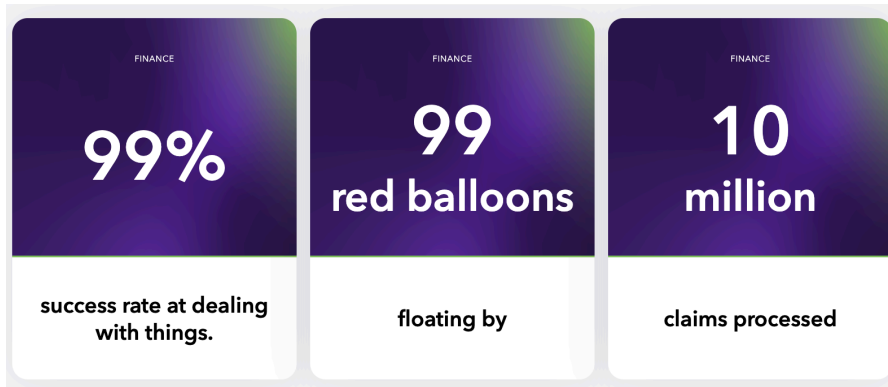
Example:

Column 1	Column 2	Column 3
Lorem ipsum dolor sit amet	consectetur adipiscing elit	10
Maecenas sed tincidunt turpis.	Morbi rutrum lacus arcu, nec pulvinar nulla blandit eget.	100
Donec ac elit consequat, bibendum felis id, sollicitudin leo.	Mauris sit amet eros tincidunt, egestas lorem in, ornare dolor.	1000
Phasellus vitae nibh et nunc tincidunt rutrum in a augue.	Vestibulum ante ipsum primis in faucibus orci	10000



Stat Cards

These cards have flexibility around their size and can be added into 1, 2 or 3 column blocks and will re-size accordingly.

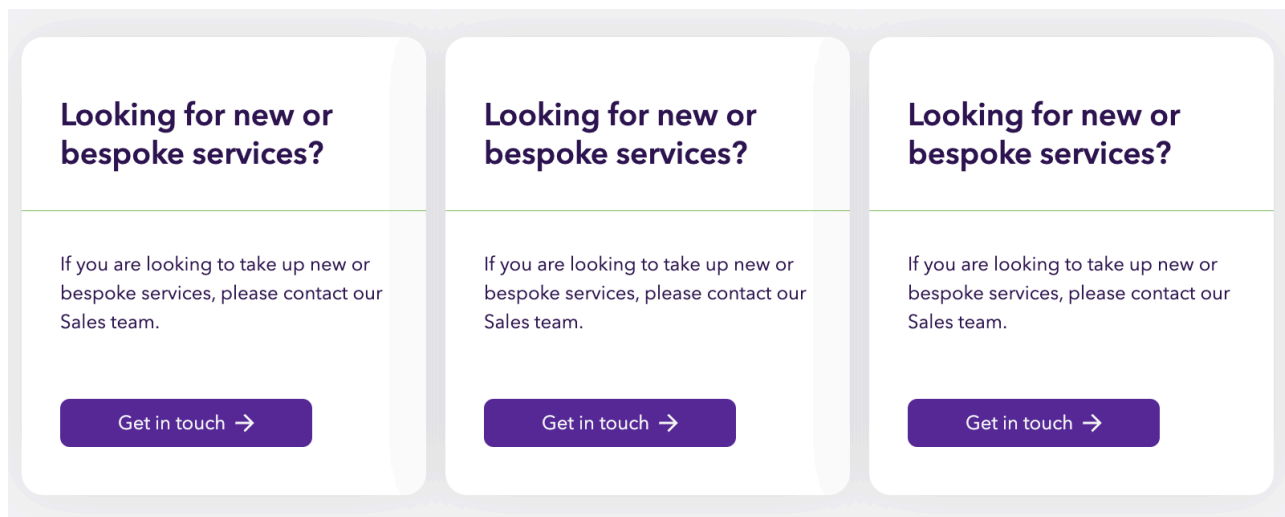


Field	Theme	Description
Label	Shared	Provides a label at the top of the card.
Figure	Shared	
Prefix	Shared	Shown to the left of the Figure value and recommended for currencies.
Suffix	Shared	Shown directly to the right of the Figure value.
Statistic (text)	Velonetic	Shown directly underneath the figure. Useful for instances where the suffix is not a single character like %.
Text	Shared	Shown underneath the figure and suffix as a further explanation of the stat.
Button	Shared	Optional clickable button to redirect user to another page.
Link align	Velonetic	Determines whether the link is centre or right aligned.
Image	Blueprint Two	Redundant. To be removed in the next deployment.
Colour	Blueprint Two	Determines the text colour.



Content Cards

These cards have flexibility around their size and can be added into 1, 2 or 3 column blocks and will re-size accordingly. The variant of the card shown will depend on the content added to the component. For example cards can display with or without images, buttons etc.



For Velonetic:

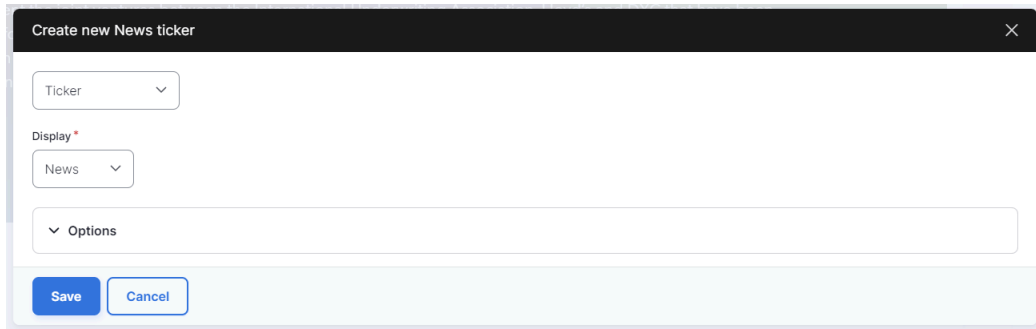
- The editor has the option to choose the icon that is added to the button using the **Link icon** field. The choices are **Arrow**, **External** and **Download** (the latter being now deprecated in favour of the below option, but still present to ensure legacy file links are still functional),
- In addition to a simple link, there is now a dedicated field for linking media items directly. This is now the recommended way of adding a link to a file

For Blueprint Two:

- The icon size can be set as large or small.
- The style of the card can be set as **Primary** or **Secondary**
 - **Primary** sets an appropriate background colour for the card based on the section background.
 - Cards on a white section have a grey background
 - Cards on a grey section have a white background.
 - **Secondary** sets the background colour for the card to transparent.

News Ticker

This block is intended to be used on the home page only. It will showcase content the most recent articles created, using the options drop down the editor can specify the number of news articles to be displayed.



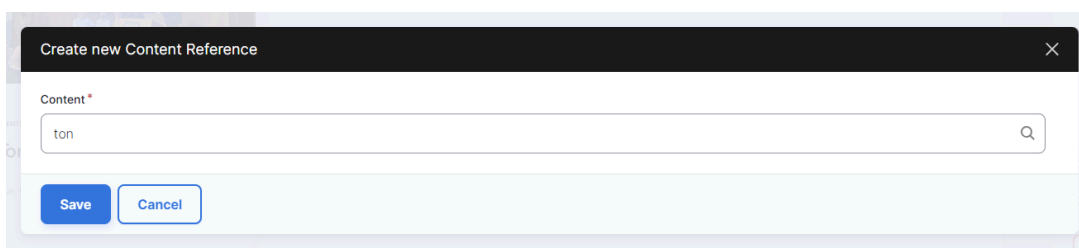
A dialog box titled "Create new News ticker" with a close button (X) in the top right corner. The dialog contains the following elements:

- A dropdown menu labeled "Ticker" with a downward arrow.
- A label "Display" followed by a red asterisk, positioned above a dropdown menu labeled "News" with a downward arrow.
- A large, empty rectangular area with a downward arrow and the label "Options" on the left side.
- At the bottom, there are two buttons: "Save" (blue) and "Cancel" (white with a blue border).

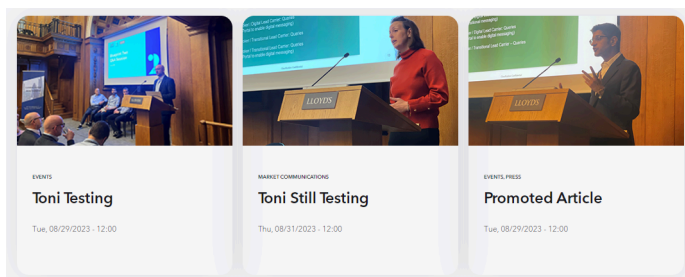
Content Reference

This component allows the editor to reference an internal page that is displayed as a content card that links to the associated content. This component can be added to a 1, 2 or 3 column section, although we suggest a minimum of 2.

On selecting the *Content Reference* block the below will appear. When you start typing the title of a page in the CMS, autocomplete suggestions will appear below the field input for you to select the page to be displayed as a card.

A screenshot of a modal dialog box titled "Create new Content Reference" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Content *" with the text "ton" entered. A magnifying glass icon is on the right side of the input field. Below the input field, there are two buttons: "Save" and "Cancel".

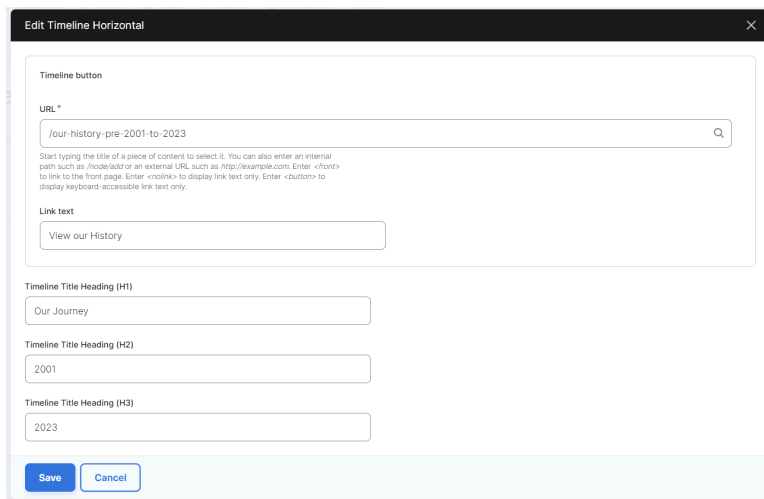
The appearance of the content card will depend on the type of content that is referenced and will automatically display any relevant details for the selected content. For example, if a *News Article* page is referenced, the card will display extra details such as the tags and publish date, as visible in the screenshot below.



Horizontal Timeline

This is a compressed timeline to encourage people to visit the detailed vertical timeline. It is a block that can be added to any page but should be used in a 1 column section.

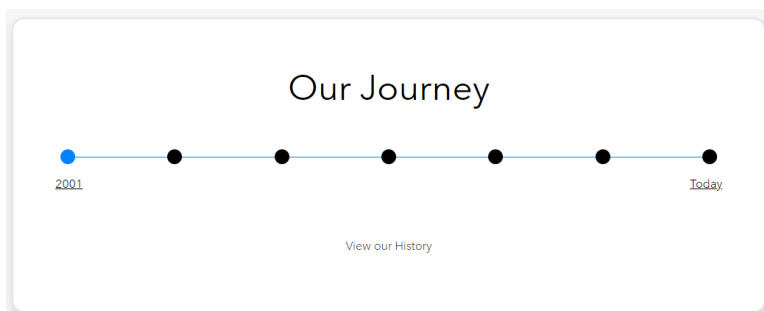
Here you enter the URL of the page you want to take the user to for viewing the detailed timeline. Heading 1, 2 and 3 are shown below.



The screenshot shows a form titled "Edit Timeline Horizontal" with a close button in the top right corner. The form is divided into several sections:

- Timeline button**: Contains a "URL *" field with the placeholder text "/our-history-pre-2001-to-2023" and a search icon. Below the field 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/123 or an external URL such as http://example.com. Enter <front> to link to the front page. Enter <node-link> to display link text only. Enter <button> to display keyboard-accessible link text only."
- Link text**: A text field containing "View our History".
- Timeline Title Heading (H1)**: A text field containing "Our Journey".
- Timeline Title Heading (H2)**: A text field containing "2001".
- Timeline Title Heading (H3)**: A text field containing "2023".

At the bottom of the form are two buttons: "Save" and "Cancel".

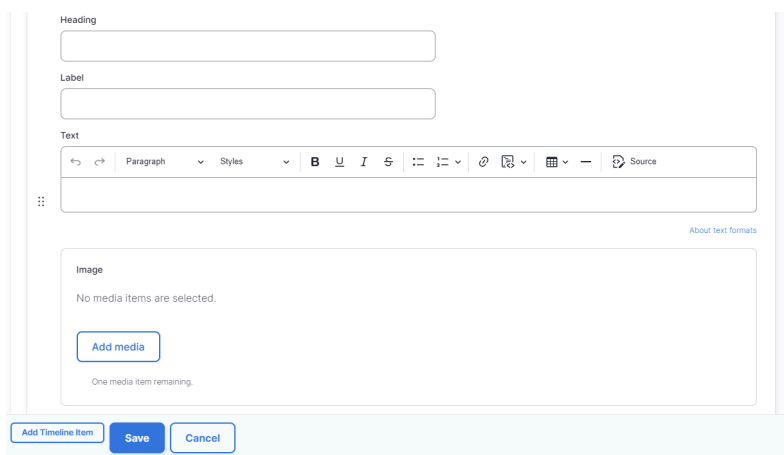


Vertical Timeline

This is the detailed timeline which can include content and images, this should always be placed in a 1 column content section.

There can be multiple **Timeline Items** added to the timeline. These will automatically alternate the display, image left – copy right, the next copy left – image right, the final item will be centred.

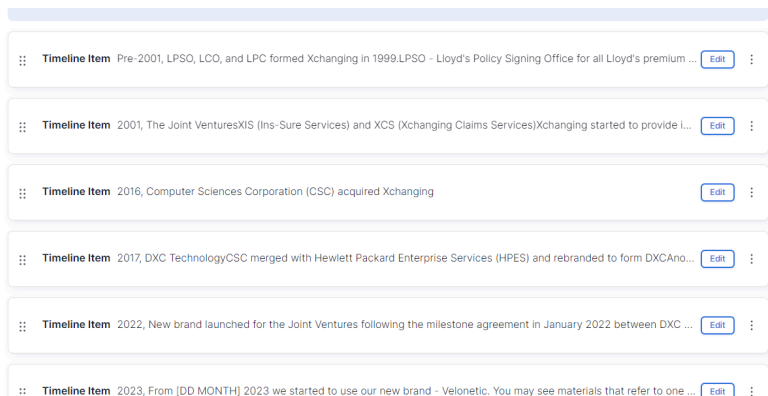
When you add the block you can enter multiple items as once, when you complete one click on the **add timeline item** button.



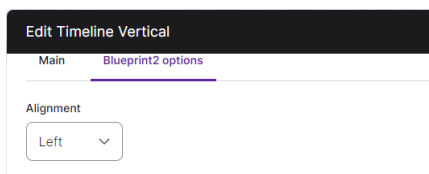
A timeline item button with an arrow icon can be now added within the text field. Proceed as follows:

- Add some text that contains a link,
- Highlight the link and apply the following 2 Text styles:
 - BP2 Tertiary
 - Arrow icon

If you need to edit the block it will display each timeline item collapsed, allowing you to edit each section. You can also use the 6 dots to the left of each line to reorder the timeline items.

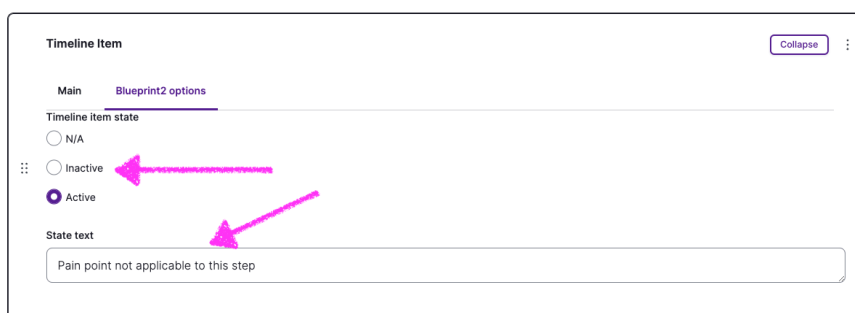


For BP2 additional options that have been added, these are only available to Blueprint Two styling. The CMS user can select whether the content is left or right aligned by selecting the **Blueprint2** options at the top of the box.



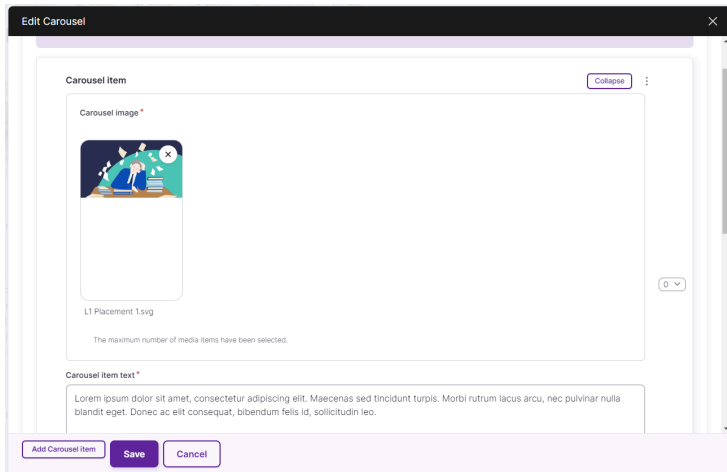
Within a **timeline component item** there are further customisations for Blueprint Two, selecting whether the item state is Inactive or Active.

The editor is able to manually edit the inactive state text for each timeline item using the fields in the **Blueprint2** options tab.

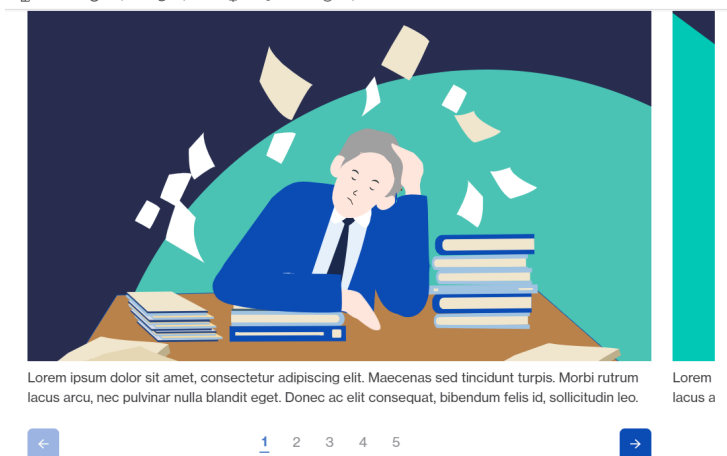


Carousel

The carousel is best used in a 1 column section. The carousel consists of individual slides containing an image with some mandatory text beneath. Multiple items can be added which allows the user to scroll through.



Each **Carousel item** requires an image and text. Using the **add Carousel item** button will add another section. You can reorder the items around using the six dots icon to the left of each slide.



Content Listing

The content listing block will show a listing of published news articles, offering the user filtering and pagination options. This block will dynamically include any new News Articles that have been added to the site.

Filtering allows you to say that you only want 'News' articles shown or 'Events' shown. This is currently a little fiddly to implement and is listed as a later enhancement to simplify the process. You can also only filter on one type currently.

In the 'options' section you will need to turn on 'Filters', under Argument you will need to add the taxonomy term ID.

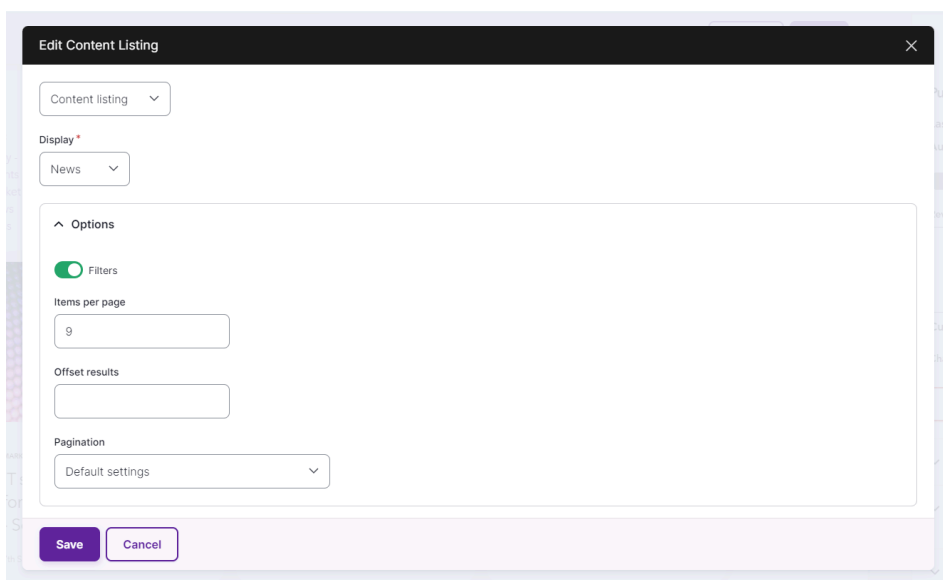
To find the taxonomy code, navigate to: **Structure > Taxonomy > Tags**

Here you will see a list of all tags for JV and Blueprint Two. Click **edit** on the one you wish to use.

In the URL bar you will see something like this:

www.velonetic.co.uk/taxonomy/term/10/edit?destination=/admin/structure/taxonomy/manage/tags/overview

After */taxonomy/term* there is a number, this is what you need to add to the Argument field in the content listing block. This will then filter what articles are shown



The screenshot shows the 'Edit Content Listing' dialog box. At the top, there's a dropdown menu set to 'Content listing'. Below it, a 'Display' dropdown is set to 'News'. An 'Options' section is expanded, showing a 'Filters' toggle switch turned on. Under 'Options', there are three input fields: 'Items per page' with the value '9', 'Offset results' which is empty, and 'Pagination' set to 'Default settings'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Previous/Next

This component allows for navigating between Pages belonging to the same level in the menu tree (i.e. the same “Section”).

← Back to site | Administration / Structure / TB Mega Menu

Config TB Mega Menu ☆

Item Configuration ([MegaMenu Toolbox](#))

Configure each link within a menu.

Show submenu CSS class Icon Item caption

No Yes

Item About Item Explore Item **Solutions** Item Resources Item Get involved

Submenu

Column

Item
[Accredited placing platform](#)

Item
[ACORD data standards](#)

Item
[Core Data Record \(CDR\)](#)

Item
[Delegated Authority \(DA\) Claims Status Tracker](#)

Item
[Delegated Authority \(DA\) Data Strategy](#)

Item
[Delegated Contract and Oversight Manager \(DCOM\)](#)

(Menu configuration is described in the Menu section).

When placed on a Page, they will automatically display a link to the next and/or previous Page. For a full circle navigation, the component will need to be placed on all Pages living on the same menu level.

See below for the first page of a “Section”,

Next →
[ACORD data standards](#)

Then for the next Pages in the same “Section”:

← Previous
[Accredited placing platform](#)

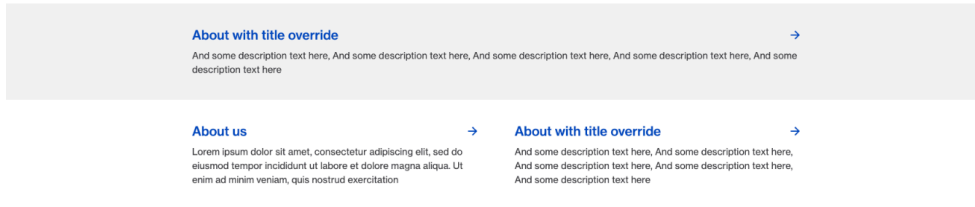
Next →
[Core Data Record \(CDR\)](#)

Note: the top and bottom lines shown on the example screenshots can be added using the “Divider” component.



List Link

The **List Link** component can be used within 1/2/3 column sections and will automatically adapt to the column width.



You can add an internal link, either to a content page or media item – or an external link. If adding an internal link the title & description of the link will be pulled in automatically from the linked page. This can be overridden on an individual component basis using the fields on the component.

If linking to an external or media item, the editor will need to fill out the additional fields in order for the component to show.

For multi-column layouts, you may also want to set the spacing between the links as the default section spacing may make the links appear too close to each other. To update the spacing between the links, edit the parent **Section** component and update the **Column Gap Horizontal** to the desired value.

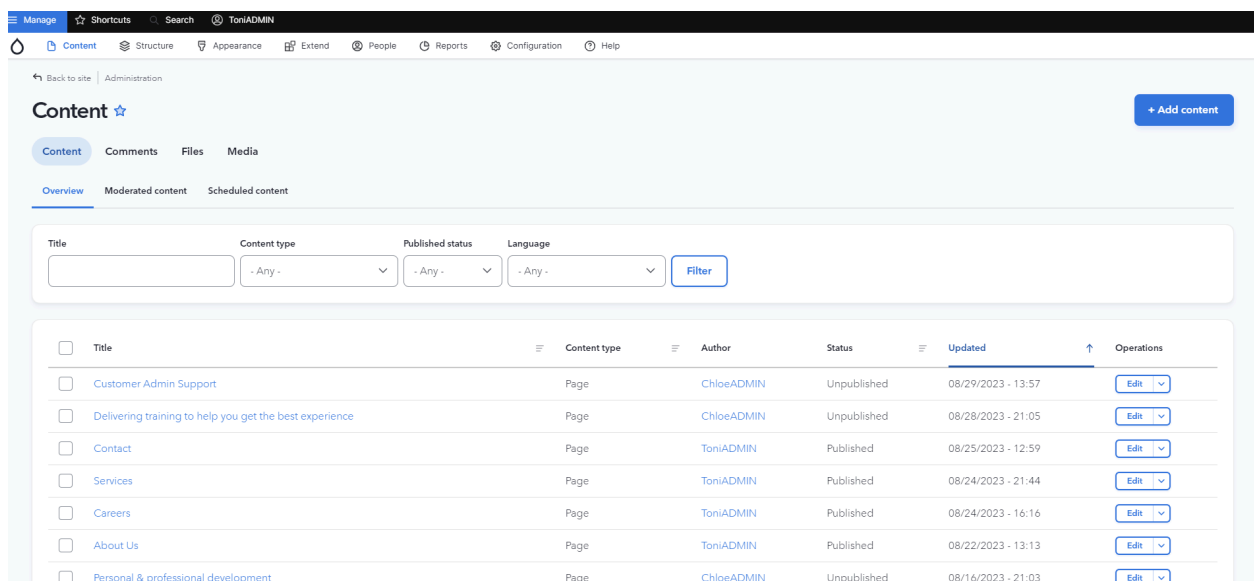


Content Management

Content Listing

When you first log into the CMS you will be navigated to the home screen. Here you can see a list of the pages that have been created.

Manage > Content



From here you can select to **Add content** for new pages or **Edit** next to an existing page you wish to make amends too.

Manage > Content > Content > Moderated

Shows content that is waiting for approval

Manage > Content > Content > Scheduled

Shows content that is scheduled for publication

Content Cloning

It is now possible to clone a piece of content both from its edit page and from the content listing page (see screenshots below). All information will be replicated within the cloned content. A good use case for this would be to create “templates” for both News Articles and Pages.



[Back to site](#) | [Edit News Article](#)

test news

[View](#) [Edit](#) [Revisions](#) [Clone](#) [Devel](#)

Title *

test news

▼ Meta data

Content

Add section

[Content](#) [Structure](#) [Appearance](#) [Extend](#) [People](#) [Reports](#) [Configuration](#) [Help](#)

[Back to site](#) | [Administration](#)

Content

[+ Add content](#)

[Content](#) [Blocks](#) [Comments](#) [Files](#) [Media](#)

[Overview](#) [Moderated content](#) [Scheduled content](#)

Title

Content type

- Any -

Published status

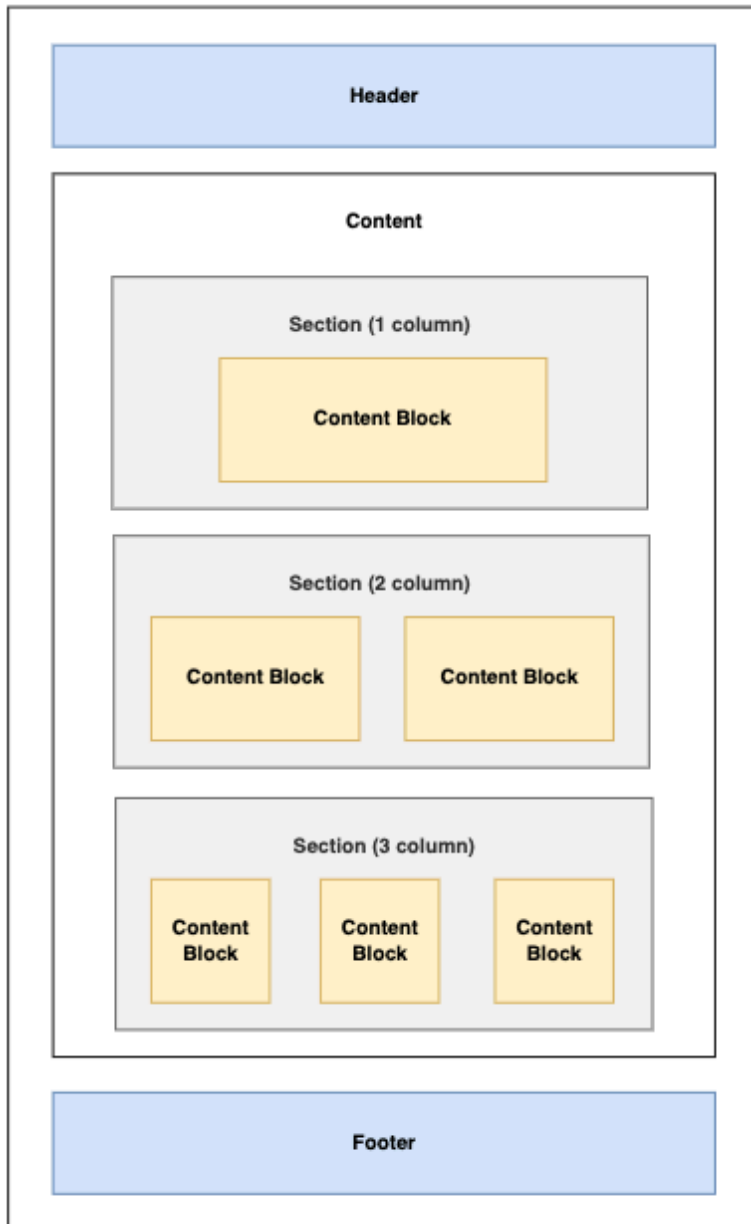
- Any -

Filter

<input type="checkbox"/>	Title	Site section	Content type	Author	Status	Updated	Operations
<input type="checkbox"/>	test news	Velonetic	News Article	admin	Unpublished	02/15/2024 - 10:28	<div>Edit</div>
<input type="checkbox"/>	London Market Central Services	Velonetic	Page	Anonymous (not verified)	Published	02/13/2024 - 17:19	<div>Delete</div>
<input type="checkbox"/>	Homepage	Velonetic	Page	Anonymous (not verified)	Published	02/13/2024 - 16:55	<div>Devel</div> <div>Clone</div>

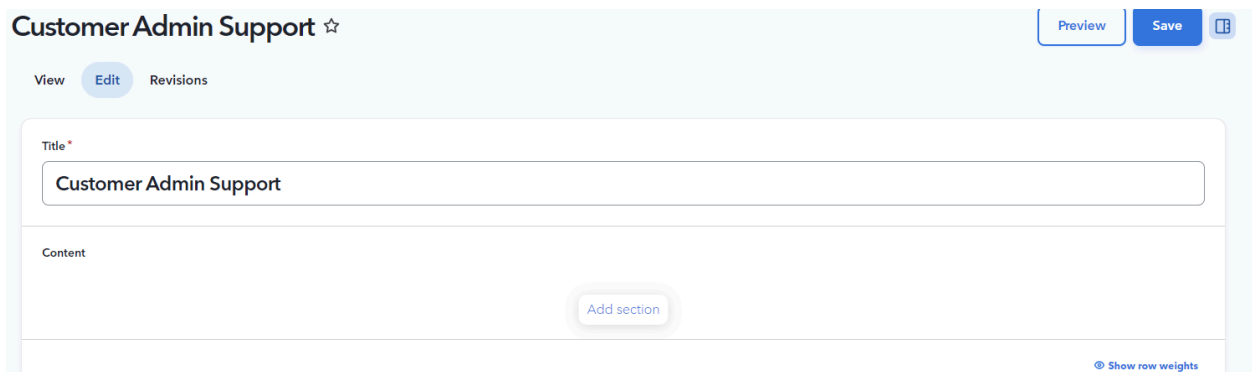
Using the Page Builder

Pages are built using a combination of sections and content blocks. See the following diagram which shows how the page builder works.



- The header and footer will always display on the page.
- Sections are added to the page content field.
- Each section can have 1, 2 or 3 columns.
- Each section(s) column must contain only one content block.

When you create a page you will see the below:

The screenshot shows a web page editor for a page titled 'Customer Admin Support'. At the top, there's a header bar with the page title, a star icon, and buttons for 'Preview', 'Save', and a settings icon. Below the header, there are tabs for 'View', 'Edit' (which is active), and 'Revisions'. The main editing area is divided into two sections: 'Title' and 'Content'. The 'Title' section has a text input field containing 'Customer Admin Support'. The 'Content' section is currently empty and features a button labeled 'Add section' in the center. At the bottom right of the content area, there is a small link that says 'Show row weights'.

A section should contain only one content block i.e. rich text field. This helps to keep the page visuals close to the designs.

Within each section you can select the number of columns, between 1-3. Three columns should only be used with content cards, bio cards or news blocks.

After adding a section you will be presented with the following screen, there are a number of options you can change here.

Width: Options are **Content**, **container** or **Full**.

- Container width is for the new JV Header Banner only
- Most other content should sit in the 'Content' width.
- Full width was previously used for JV banners, this content will stretch the whole width of the screen.

Horizontal & Vertical gaps:

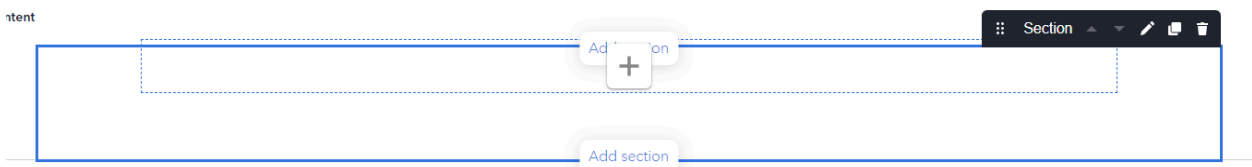
- These should be left as default.

Padding top & bottom:

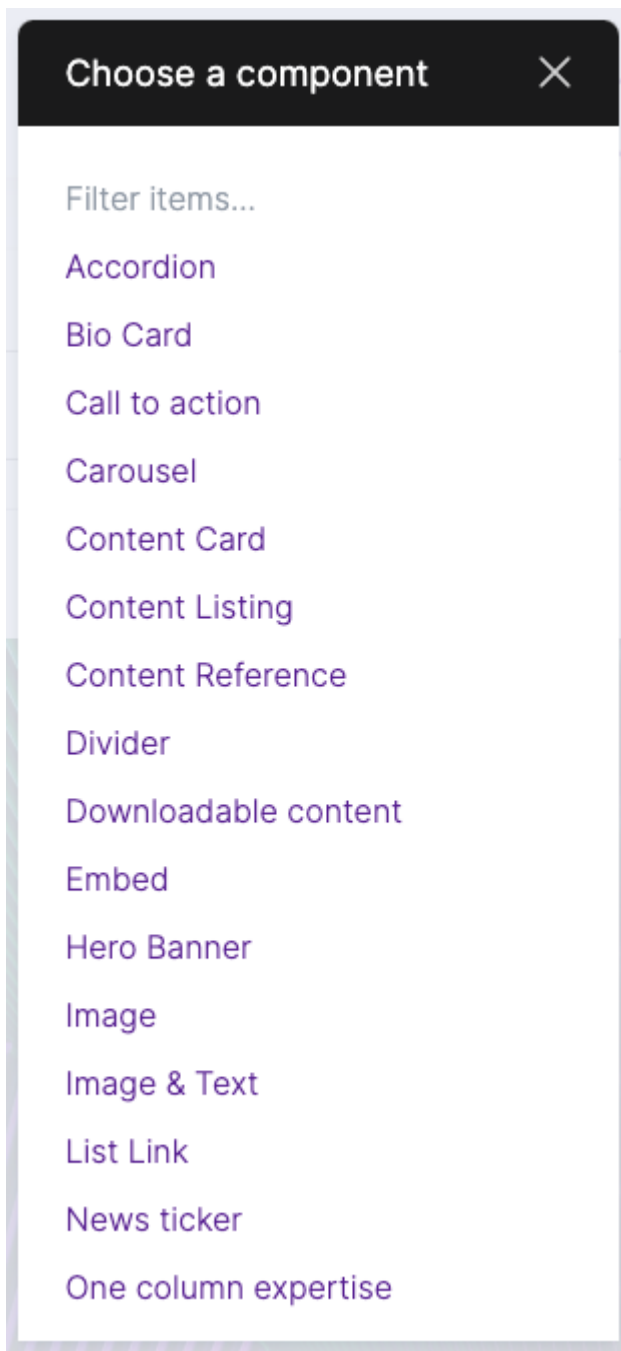
- These are set as default but can be changed. This is recommended where you have multiple sections with bio cards or content cards to show it as a page section. You may need to change and preview to get the look you want whilst entering the content.

Once saved you will see the below, this is a one column section.

From here you can use the black toolbar to **edit** the section (as above – change padding or number of columns) this is the pencil icon.



- Delete by clicking the bin icon
- Duplicate the section by clicking the two page icon.
- Click the + icon to add a content block to the section.

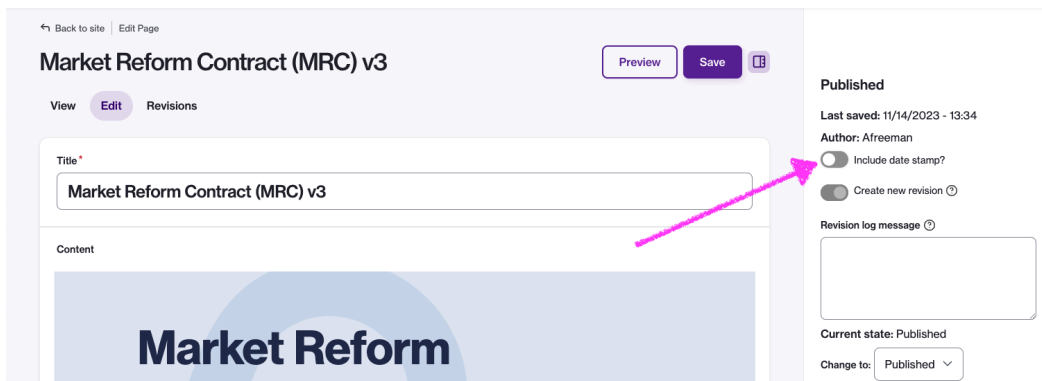


Components are sorted alphabetically.

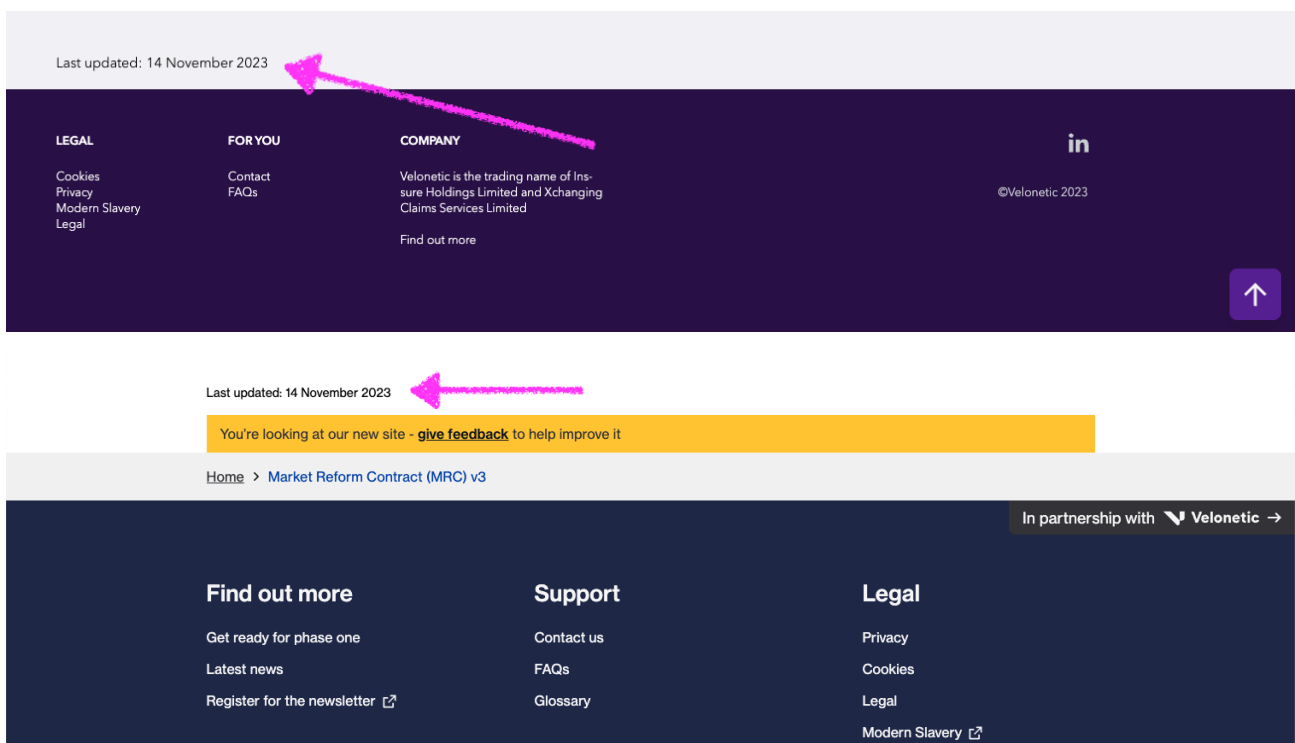
Last Updated Timestamp

For each page, the editor has the option to include a **last updated** timestamp to indicate to the user when the page was last updated.

By default this option is disabled, and will need to be manually checked by the editor in order for the date to show on the page.



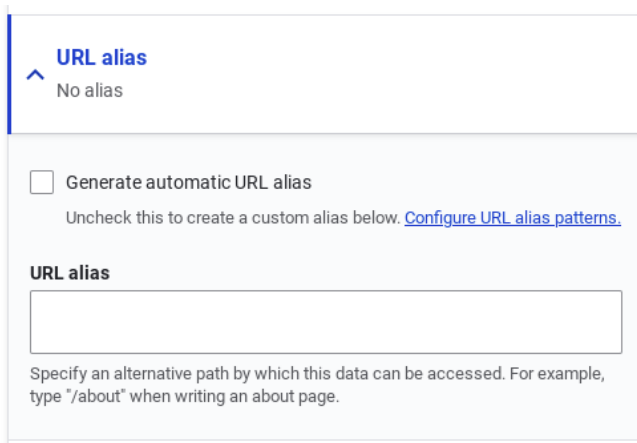
The date the page was last updated is shown left aligned above the footer on both Velonetic and Blueprint Two pages (where enabled)



URL Creation

The site will automatically create a URL in line with the main domain and page name. However we recommend you structure URLs as per the document shared previously (JV URL Creation - SEO)

When entering the URL you don't need to add the domain, just the page i.e /transformation or /velonetic-in-the-news. If the page is a child page to another i.e. transformation that will come before hand i.e. www.velonetic.co.uk/transformation/transformation-two



The screenshot shows a web interface for configuring URL aliases. At the top, there is a section titled "URL alias" with a sub-label "No alias". Below this, there is a checkbox labeled "Generate automatic URL alias" which is currently unchecked. A note below the checkbox says "Uncheck this to create a custom alias below. [Configure URL alias patterns.](#)". Underneath, there is a section titled "URL alias" followed by a text input field. Below the input field, there is a descriptive text: "Specify an alternative path by which this data can be accessed. For example, type '/about' when writing an about page."

Key things to remember when creating URLs:

- Keep it simple
- Keep it short
- Use descriptive words
- Avoid long number strings
- Use hyphens, not underscores
- Avoid joining words together i.e. 'ourservices' should be 'our-services'
- Use all lowercase letters
- Don't use special characters



Metadata

Simple Metadata

Basic metadata can be added using the **Meta data** tab on the main content edit form. Best practice is to include a short description of the page, which will be used in search engine result previews.

Meta data

Short title ⓘ

Home Page

Text used for the page's meta title, text that is displayed on search engine result pages to indicate the topic of a webpage

Short description ⓘ

Used for the page's meta description. A meta description tag generally informs and interests users with a short, relevant summary of what a particular page is about.

Listing Image ⓘ

No media items are selected.

Add media

Advanced Metadata

There is also an option of adding more advanced metadata to pages. This can be found on the right hand side of the page edit form. For more detail please see the Appendix for guidance

Meta tags

Configure the meta tags below.
Use tokens to avoid redundant meta data and search engine penalization. For example, a "keyword" value of "example" will be shown on all content using this configuration, whereas using the [node:field_keywords] automatically inserts the "keywords" values from the current entity (node, term, etc).
[Browse available tokens.](#)

Basic tags ⓘ

Advanced ⓘ



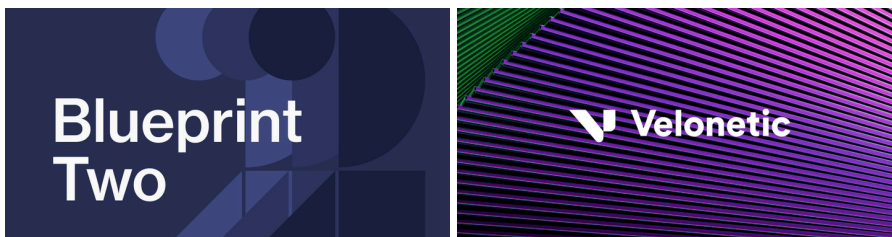
Opengraph

[Opengraph tags](#) provide guidance to social media platforms with regards to how preview links should be displayed.

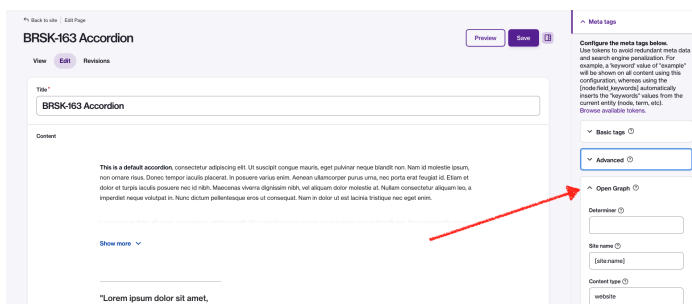
The following mapping is used to determine the content shown:

Website field	Opengraph tag
Page title	og:title
Short description	og:description
Listing image*	og:image
Page URL	og:url
“article” for article pages “website” for basic pages.	og:type
“Velonetic” or “Blueprint Two” depending on page theme.	og:site_name

*If a listing image has not been uploaded to the page, then the page will use the fallback opengraph images provided in the theme, as shown below.



If required specific values can be overridden per page using the opengraph tab in the sidebar.



XML Sitemap

An XML sitemap is a file that lists a website's essential pages, making sure Google can find and crawl them. It also helps search engines understand your website structure.

The XML Sitemap for the Velonetic website is found here:

<https://www.velonetic.co.uk/sitemap.xml>

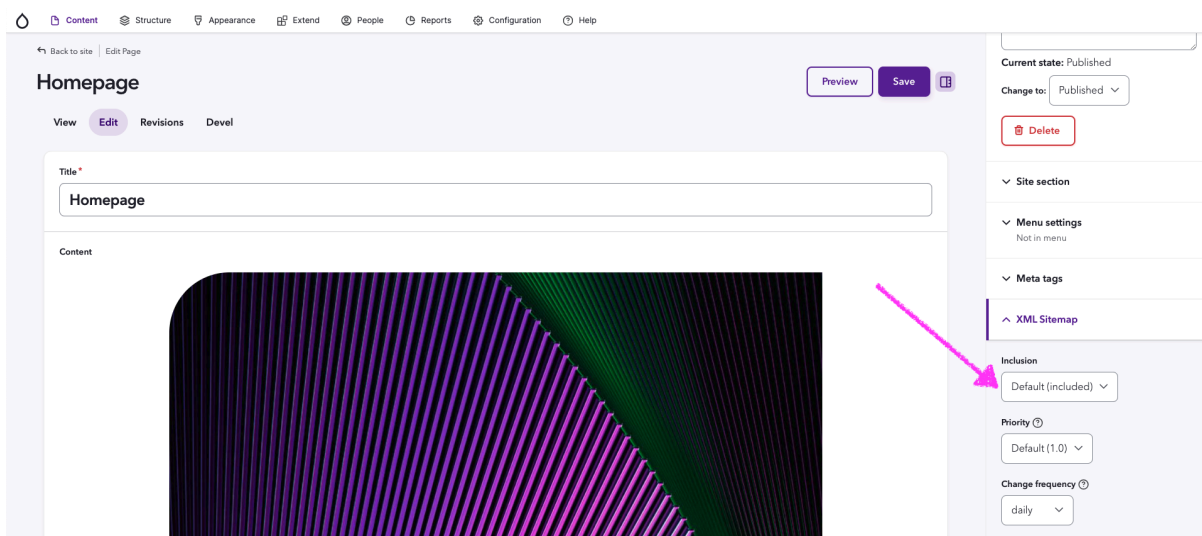
More detailed information about XML sitemaps can be found here:

<https://www.semrush.com/blog/xml-sitemap/>

Including / Excluding pages

It is possible to exclude certain pages from the XML sitemap when editing the page. In the right hand sidebar, there is a section called **XML Sitemap**.

In this section you can opt to exclude or include the page, and override the priority and change frequency of the page.



By default all pages will be **included** in the XML sitemap.

Sensible defaults have been added for the frequency and priority, but these can be overridden per page if required.

Redirects

Implementing redirects can only be accomplished by a user with an **Administrator** role.

Config > Search & metadata > URL redirect

- Click on the add redirect, complete the data as described below:
- Enter the path of the decommissioned page
- Add the page URL you wish to redirect to
- You can use the search here to help find the page
- Leave the default option of 301 moved permanently

NOTE: this is currently not working correctly and will be added to the support backlog for fixing once live as there should not be any redirects when we launch.



Navigation

Menu management

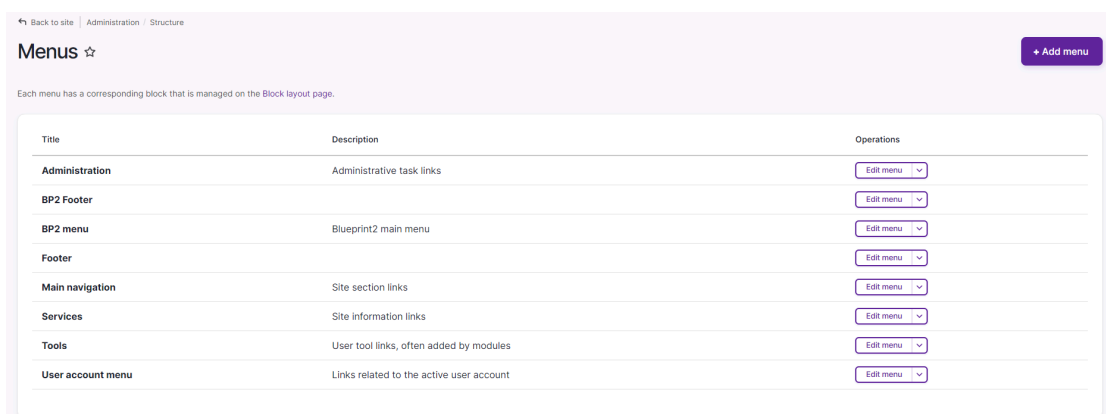
Menus are used to provide a means of navigation around the site for the end user.

There are **four** editable menus on the site:

- Velonetic main navigation (**Main Navigation**)
- Velonetic footer navigation (**Footer**)
- Blueprint Two header navigation (**BP2 menu**)
- Blueprint Two footer navigation (**BP2 Footer**)

There are two ways to add a page into the navigation structure:

Admin users can navigate to **Structure > Menus > [Menu Name]**



Back to site | Administration | Structure

Menus ☆

Each menu has a corresponding block that is managed on the Block layout page.

Title	Description	Operations
Administration	Administrative task links	Edit menu
BP2 Footer		Edit menu
BP2 menu	Blueprint2 main menu	Edit menu
Footer		Edit menu
Main navigation	Site section links	Edit menu
Services	Site information links	Edit menu
Tools	User tool links, often added by modules	Edit menu
User account menu	Links related to the active user account	Edit menu

By clicking edit you will be able to see a list of the menu items. You can use the cursor icons highlighted below to drag and reorder the menu items.

Title *

Main navigation Machine name: main

Administrative summary

Site section links

⊗ Show row weights

Menu link	Enabled	Operations
✚ About	<input checked="" type="checkbox"/>	Edit ▾
✚ Services	<input checked="" type="checkbox"/>	Edit ▾
✚ Visit Velonetic	<input checked="" type="checkbox"/>	Edit ▾
✚ Blueprint Two	<input checked="" type="checkbox"/>	Edit ▾
✚ Careers	<input checked="" type="checkbox"/>	Edit ▾
✚ News	<input checked="" type="checkbox"/>	Edit ▾

From here you can edit an existing menu item or add a new one:

Menu Link Title: The name that will appear in the menu

Description: Will be displayed:

- As part of the flyout submenu for level 1 menu items
- While hovering over a menu item that doesn't have a submenu or deeper than level 1

Link: This is the page the menu item will link to

Enabled: Enables or disables the menu item

Parent Link: Assigns a parent link to allow multiple levels of menu. Note that not all menus support multiple levels in the front end.

Manage ☆ Shortcuts Search TONIADMIN

Content Structure Appearance Extend People Reports Configuration Help

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/50 or an external URL such as http://example.com. Enter <front> to link to the front page. Enter <node> to display link text only. Enter <button> to display keyboard-accessible link text only.

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

Description

Shown when hovering over the menu link.

☐ **Show as expanded**
If selected and this menu link has children, the menu will always appear expanded. This option may be overridden for the entire menu tree when placing a menu block.

Parent link

<Main navigation> ▾

The maximum depth for a link and all its children is fixed. Some menu links may not be available as parents if selecting them would exceed this limit.

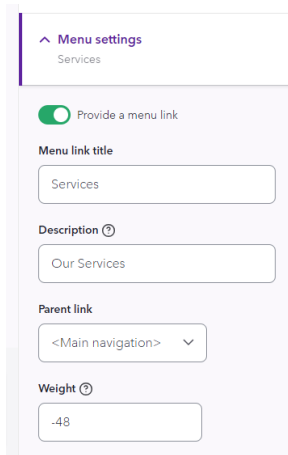
Weight

0

Link weight among links in the same menu at the same depth. In the menu, the links with high weight will link and links with a low weight will be positioned nearer the top.

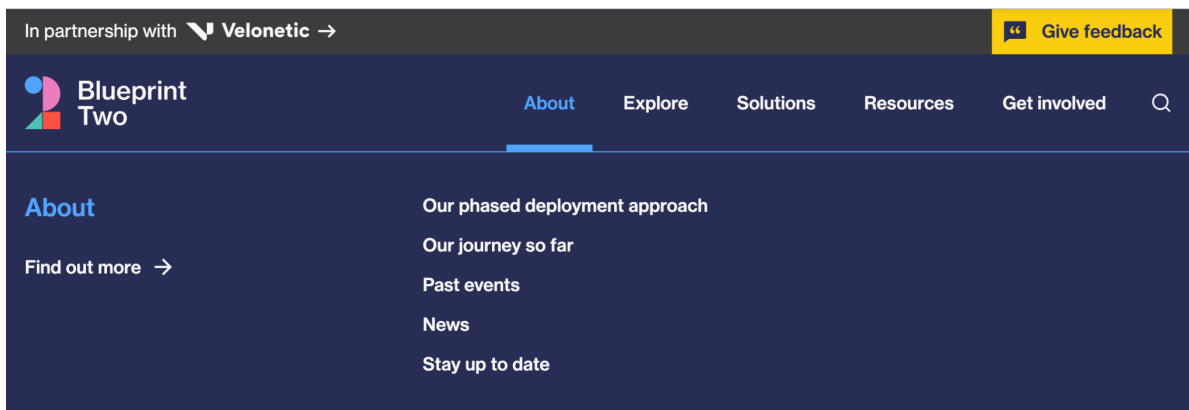
Save

All of the above can also be achieved whilst adding/editing a page. On the right hand side select **Menu Setting** when you can add it to the main navigation or secondary and add **Menu link title** and **Parent link**.



The screenshot shows a 'Menu settings' form for a menu item named 'Services'. It includes a toggle for 'Provide a menu link' which is turned on. Below this are input fields for 'Menu link title' (containing 'Services'), 'Description' (containing 'Our Services'), 'Parent link' (a dropdown menu set to '<Main navigation>'), and 'Weight' (containing '-48').

Megamenu management (navigation appearance)



The frontend appearance of the main navigation for each theme can be controlled by admin users at: [Structure > TB Mega Menu](#) > [Menu Name]

IMPORTANT: Because it directly affects the menu visually, we advise to proceed with caution and make the desired changes on a test environment first.

Once clicking the **edit** button for one of the menus, the following screen will be presented, displaying each menu item. Clicking the **Save** button at any point will save any changes made to the menu. Clicking the **Reset** button will restore the configuration to the last saved state.



← Back to site | Administration / Structure / TB Mega Menu

Config TB Mega Menu ☆

MegaMenu Toolbox
[Edit links](#)

This toolbox includes global menu settings. Click on a menu item, submenu or column for additional configuration options.

Mobile breakpoint
Hide mobile menu
☐ No ☐ Yes
Animation
Submenu arrow
☐ No ☐ Yes
Show submenu on mobile
☐ No ☐ Yes

Item About
Item Explore
Item Solutions
Item Resources
Item Get involved

Menu items

Config TB Mega Menu ☆

Item Configuration ([MegaMenu Toolbox](#))
[Edit links](#)

Configure each link within a menu.

Show submenu
☐ No ☒ Yes
CSS class
Icon
Item caption

Item About
Item Explore
Item Solutions
Item Resources
Item Get involved

Submenu
Column
Flyout Parent
Item Block
BLOCK

Column
Item
Our phased deployment

Selecting a top level menu **item** will open the configuration form above.

Only the following options affect the frontend:

- **Show submenu** - Determines whether the submenu should be visible on the frontend

Menu columns

The screenshot shows the 'Config TB Mega Menu' interface. At the top, there's a title 'Config TB Mega Menu ☆'. Below it, the 'Column Configuration (MegaMenu Toolbox)' section is visible. The configuration form includes several fields: 'Add/remove column' (with '+' and '-' buttons), 'Move row up/down' (with up and down arrows), 'Hide on mobile' (with 'No' and 'Yes' buttons), 'Grid (1-12)' (a dropdown menu showing '4'), 'Blocks' (a dropdown menu showing 'Flyout Parent Item Block'), 'Show block title' (with 'No' and 'Yes' buttons), and 'CSS class' (a text input field). There are 'Save' and 'Reset' buttons at the bottom right of the form. Below the form, there's a preview of the menu structure. The 'Column' is selected, and its configuration is shown in a separate box. The 'Column' configuration includes 'Flyout Parent Item Block' and 'BLOCK'.

Selecting a **Column** will open the configuration form above.

Only the following options affect the frontend:

- **Add/remove column** – Adds a column to the row or submenu
- **Hide on mobile** – Determines whether the selected column should appear on mobile
- **Grid (1-12)** – Determines the width of the column
- **Blocks** – Allows a block to be placed within the column.
 - Currently only supports the following blocks:
 - **Flyout Parent Item Block** – Displays the parent menu item name and description

Nested menu items

Back to site | Administration / Structure / TB Mega Menu

Config TB Mega Menu ☆

Item Configuration (MegaMenu Toolbox) [Edit links](#)

Configure each link within a menu.

Show submenu	Submenu as flyout	Break column	CSS class	Icon	Item caption
No Yes	Yes No	← →			

[Save](#) [Reset](#)

Item About Explore Solutions Resources Get involved

Submenu

Column	Column	Column
Flyout Parent Item Block BLOCK	Item Our phased deployment approach Item Our journey so far	Item Past events News Item Stay up to date

Selecting a nested menu **item** will open the configuration form above.

Only the following options affect the frontend:

- **Show submenu** - Determines whether the submenu should be visible on the frontend
- **Submenu as flyout** - Determines whether the submenu is displayed directly below the selected menu item or only on hover. (Not currently supported, this should be set to **No** when the **Show submenu** option is set to **Yes**)
- **Break column** - Moves the selected menu item to the previous/next column. When the menu item is already in the last column, the menu item is added to a new column

Section Navigation

The screenshot shows the Blueprint Two website interface. At the top, there is a dark blue header with the text 'In partnership with Velonetic →' and a yellow 'Give feedback' button. Below this is a navigation bar with links: 'About', 'Explore', 'Solutions' (highlighted), 'Resources', and 'Get involved'. A search icon is also present. The main content area has a breadcrumb trail: 'Home > Solutions > Accredited placing platform'. A blue bar indicates 'Part of: Solutions' with a 'Hide contents ^' button. The main heading is 'Accredited placing platform' with the subtitle 'A placing system used to support risk placement'. To the right, a list of sub-items is displayed under the heading 'Accredited placing platform':

- [ACORD data standards](#)
- [Core Data Record \(CDR\)](#)
- [Delegated Authority \(DA\) Claims Status Tracker](#)
- [Delegated Authority \(DA\) Data Strategy](#)
- [Delegated Contract and Oversight Manager \(DCOM\)](#)
- [Delegated Data Manager \(DDM\)](#)
- [Digital Gateway](#)
- [Digital Processing Platform for claims \(ICOS\)](#)
- [Digital Processing Platform for premiums \(IPOS\)](#)
- [Faster Claims Payment \(FCP\)](#)
- [Market Reform Contract \(MRC\) v3](#)

This is enabled from the menu administration page (example for BP2: `/admin/structure/menu/manage/bp2-menu`). You will need to edit the “parent” menu item in order to enable the navigation on all “children” by ticking the below toggle.



Menu link weight

Name

⬆️⬆️ About

⬆️⬆️ Explore

⬆️⬆️ **Solutions** (provided menu link)

⬆️⬆️ Resources

⬆️⬆️ Get involved

Change the weight of the links within the [BP2.menu](#) menu by dragging the items up/down.



Enable section menu

Save

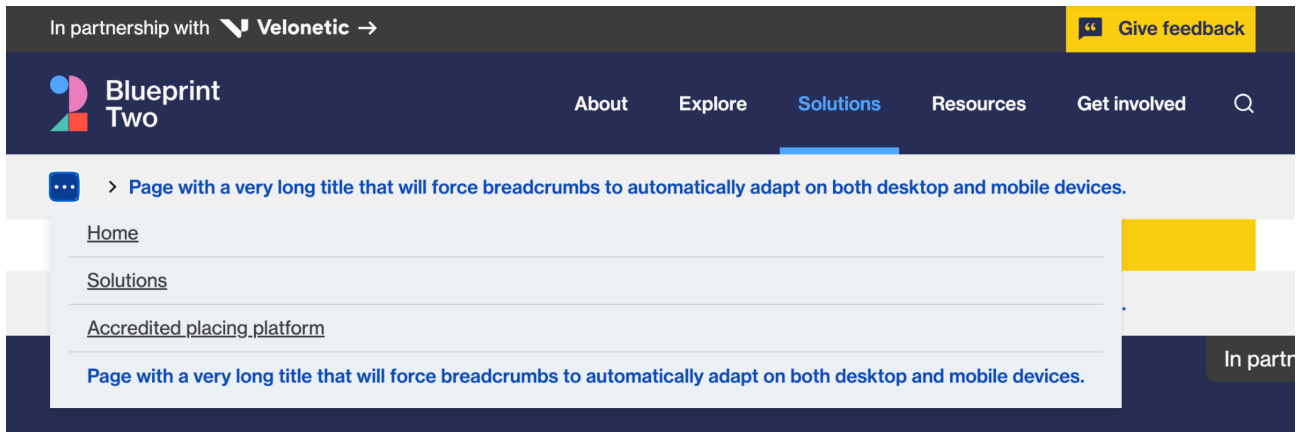
 Delete



Breadcrumbs

They are automatically added to all pages of the BP2 website section, except on its homepage.

Long titles and generally long breadcrumb trails are dealt with using ellipsis, as well as a dropdown menu, both on desktop and smaller devices (see example below).



The Pages will need the following for the breadcrumbs to be optimal:

- to be placed under the relevant Section (here, BP2) in the “Site section” right hand side menu.
- belong to a Menu (“provide menu link”, see screenshot below)

^ Site section

Site section

Blueprint 2 ▾

^ Menu settings

Page with a very long title that will force breadcrumbs to automatically adapt on both desktop and mobile devices.



Provide a menu link

Menu link title

In page navigation

You can enable the component on a page when editing its link in the matching menu (for example: /admin/structure/menu/manage/bp2-menu). See screenshot below:

The screenshot shows a configuration interface for a menu link. It includes several sections: 'Menu link title' with a text input containing 'Accredited placing platform'; 'Description' with an empty text input; a 'Show as expanded' toggle switch which is currently off; a 'View mode' dropdown menu set to 'Default'; and an 'Enable section menu' toggle switch which is also off. At the bottom, there is a section titled 'In page navigation' which is highlighted with a red rectangular box. Inside this section is a dropdown menu currently set to 'Include H2 titles'.

Menu link title *

Accredited placing platform

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

Description

Shown when hovering over the menu link.

☐ Show as expanded

If selected and this menu link has children, the menu will always appear expanded. This option may be overridden for the entire menu tree when placing a menu block.

View mode

Default ▾

Per item view mode selector.

☐ Enable section menu

In page navigation

Include H2 titles ▾

H2 and/or H3 contained exclusively with Rich text components will then be scanned and added to the section navigation. Note: as it is attached to the Hero banner, make sure it is present on your page too. You will also need to update the parent section vertical gap to suppress the spacing between the hero and the navigation (see Content Blocks / Section).

User Management

User Roles

Role	Description
Administrator	Full access to all CMS configurations. This role is reserved for the development team at TPXimpact.
Client Admin	Full access to all content management related activities. Also able to create new users and assign roles (excluding Administrator). Access to any configuration which poses a risk to breaking site functionality has been removed from this role.
Content Editor	Restricted access to content management related activities. Can create and edit content, but not publish it.
Content Editor (BP2)	Currently the same as Content Editor. This role was added to future proof in case the permissions for the site needed to diverge based on the editor.

As a security measure, roles and their allocated permissions are managed by TPXimpact. Any requests for enhanced permissions should be made via TPXimpact.

View Users

Manage > People > List

Here you can see a list of users that already exist and have the option to edit or create new ones. You can also see their last login, status and role.



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Home > Administration

People

- List
- Permissions
- Roles
- Role settings

+ Add user

Name or email contains

Status
- Any -

Role
- Any -

Permission
- Any -

Filter

Action
Update URL alias

Apply to selected items

<input type="checkbox"/>	Username	Status	Roles	Member for	Last access	Operations
<input type="checkbox"/>	ContentToni	Active	• Content editor	16 minutes 5 seconds	never	Edit
<input type="checkbox"/>	toni.simpson	Active	• Super User	19 minutes 1 second	never	Edit

Adding Users

Users with the **Administrator** role can add, remove and edit other users as required.

By clicking **add user** you are guided through the process of adding someone to the CMS. As an Administrator you can create Administrators or Content Editors (who have some restrictions to their access)



Back to site Manage Shortcuts developer

Content Structure Appearance Extend Configuration People Reports Help

Home Administration People

Add user

This web page allows administrators to register new users. Users' email addresses and usernames must be unique.

Email address

The email address is not made public. It will only be used if you need to be contacted about your account or for opted in notifications.

Username*

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

Password*

Provide a password for the new account in both fields.

Status

☐ Blocked

☒ Active

Roles

☒ Authenticated user

☐ Content editor

☐ Super User

☐ Notify user of new account

Picture

Add a new file

No file chosen

Your virtual face or picture.
One file only.
2 MB limit.
Allowed types: png gif jpg jpeg

Contact settings

☒ Personal contact form

Allow other users to contact you via a personal contact form which keeps your email address hidden. Note that some privileged users such as site administrators are still able to contact you even if you choose to disable this feature.

Locale settings

Time zone

Manila

Select the desired local time and time zone. Dates and times throughout this site will be displayed using this time zone.

URL alias

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

Create new account

Deleting Users

It is recommended that instead of deleting users, user accounts are **disabled**. This blocks the user from having access to the CMS, but keeps the history intact.

Two-Factor Authentication (TFA)

The CMS uses Time-based One-Time Passwords (TOTP) as a method of TFA. This requires not only your password but also a code generated by an app on a device.



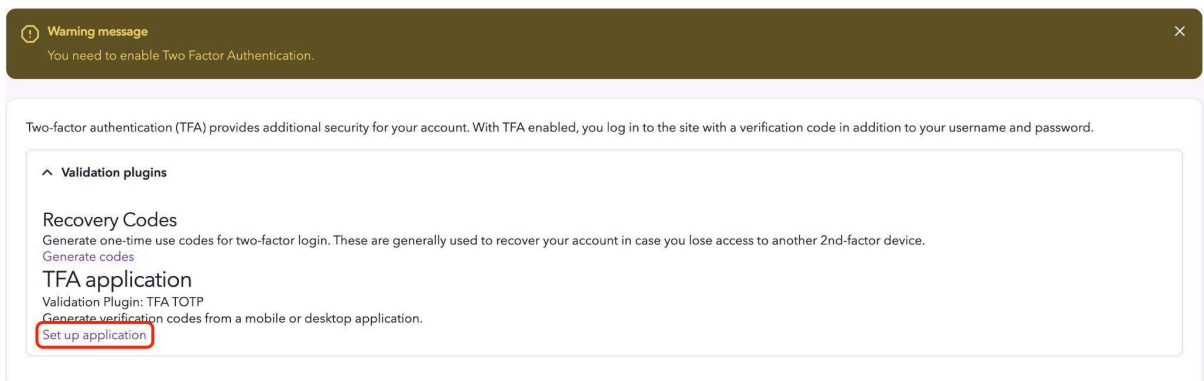
TFA for CMS Users

Initial Login

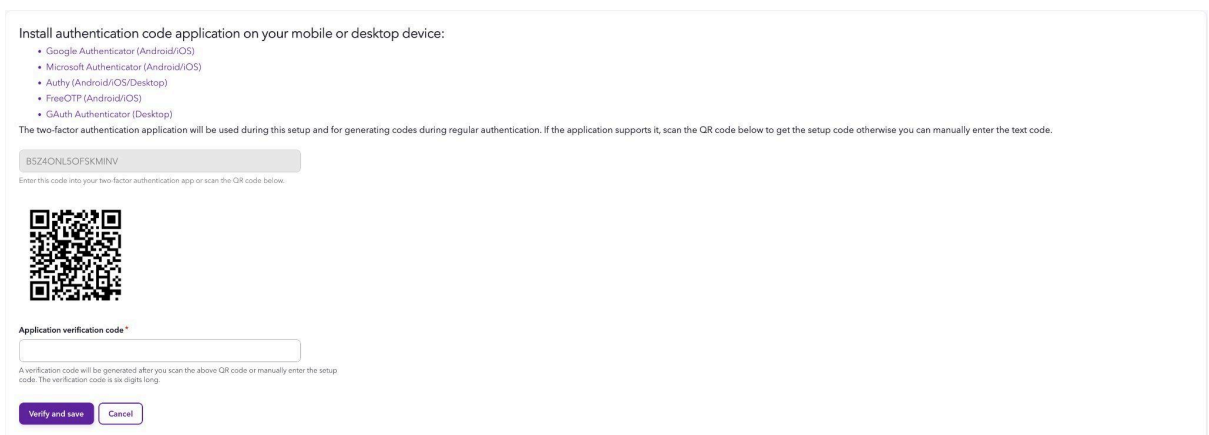
When a user that hasn't set up TFA logs in for the first time, they will be prompted to enable TFA. The user will not be able to navigate around the site and will continue to see the screen shown in the image below until TFA has been enabled for the account.

Setting up TFA

1. Click the Set up application link and enter the current password for the account.



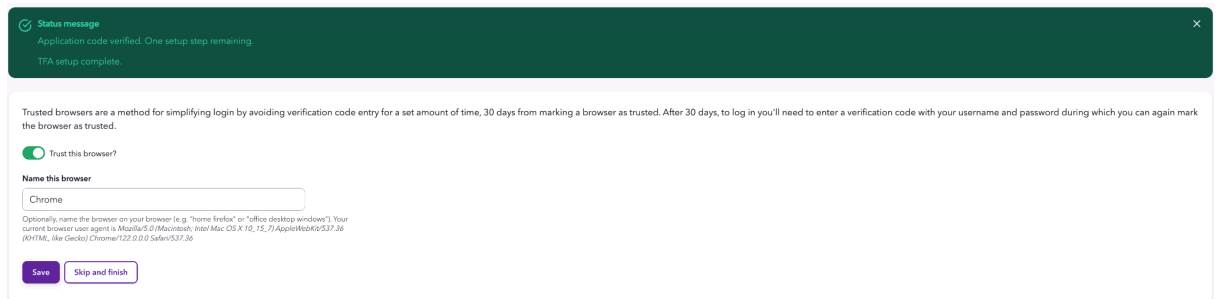
2. After entering the account password, a QR code is presented to be scanned using one of the listed mobile/desktop authentication code applications. Alternatively, if the QR code cannot be scanned, the secret key above the QR code can be copied and entered into the chosen authentication app.



3. Now enter the 6 digit code generated by the chosen authenticator app in the Application verification code field and click the Verify and save button.



4. The user should now see a message notifying that TFA setup is complete and have the choice of trusting the current browser for the next 30 days.



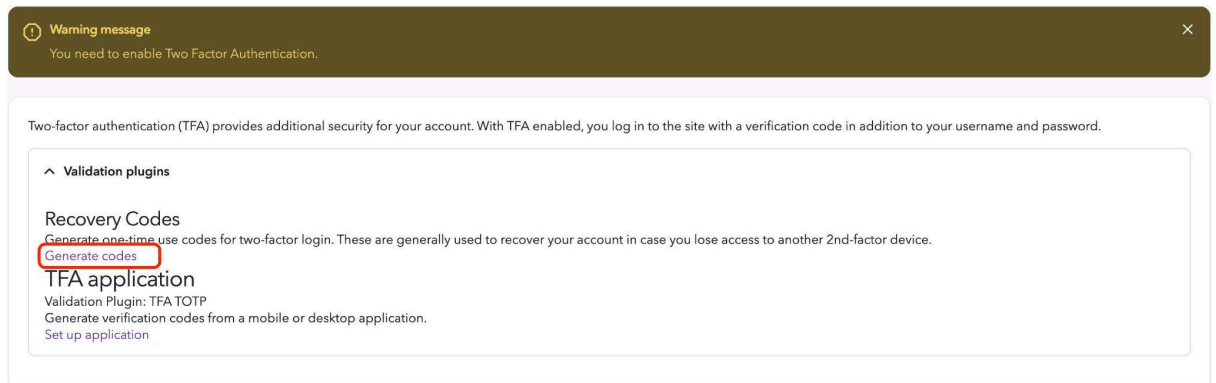
Recovery Codes

It's recommended users also generate backup recovery codes for their account. These are single-use codes that grant access to your account if you cannot use your authenticator app.

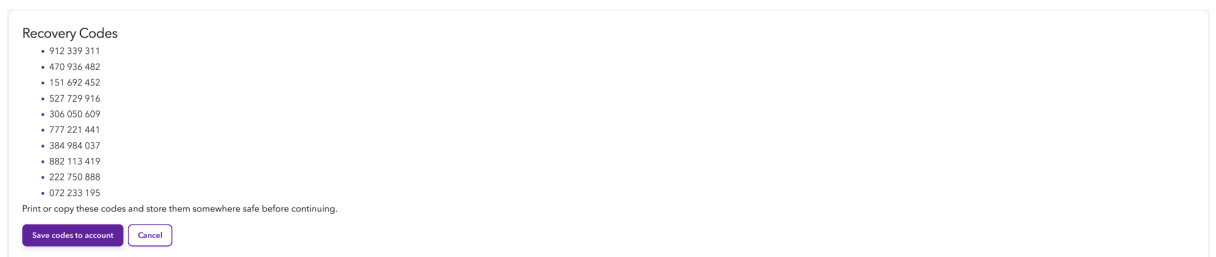
If you're unable to access your authenticator app, you can use one of your recovery codes to log in. Enter the recovery code when prompted for a time-based one-time password (TOTP).

Consider saving the recovery codes in a password manager or printing them out and keeping them in a secure location.

1. Click the Generate codes link and enter the current password for the account



2. After entering the account password, 10 backup recovery codes are presented. While these can be viewed from your account later, it's highly recommended these are stored in a secure location to regain account access if you cannot use your authenticator app.



Managing TFA

Users can manage their TFA preferences later by accessing the TFA link in the user toolbar

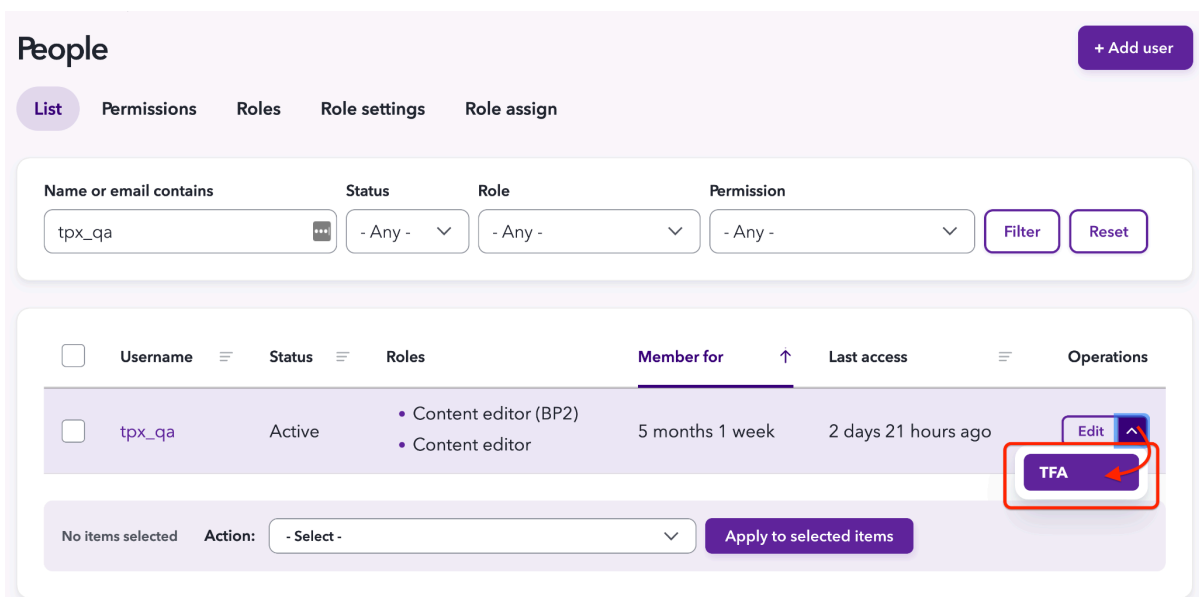


TFA Administration

Resetting TFA

There may be occasions where a user is locked out of their account due to losing access to their TOTP device and not having their backup recovery codes. In such cases, admin users have the capability to reset TFA for the affected user, allowing them to regain access to their account and reconfigure TFA.

1. As an admin user, navigate to the People management screen and find the user that requires their TFA to be reset. Click the drop-button arrow next to the Edit user operation to reveal and select the **TFA** operation.



2. The TFA status for the user's account will be displayed at the top of the page with a link to Disable TFA for the user.

Two-factor authentication (TFA) provides additional security for your account. With TFA enabled, you log in to the site with a verification code in addition to your username and password.

Status: **TFA enabled**, set 1st March 2024. [Disable TFA](#)

^ Validation plugins

Recovery Codes
Generate one-time use codes for two-factor login. These are generally used to recover your account in case you lose access to another 2nd-factor device.
[Reset codes](#)

TFA application
Validation Plugin: TFA TOTP
Generate verification codes from a mobile or desktop application.
[Reset application](#)

^ Login plugins

Trusted browsers
Browsers that will not require a verification code during login.
No trusted browsers found.
[Configure trusted browsers](#)

[Reset skip validation attempts](#)

3. After clicking the Disable TFA link, the admin user must enter their own account password before clicking the Disable button to confirm the operation.

Are you sure you want to disable TFA for user *tpx_qa*?
TFA settings and data will be lost. *tpx_qa* can re-enable TFA again from their profile.

Confirm your current password *

.....

[Disable](#) [Cancel](#)

4. TFA for the CMS user will now be disabled. Next time the user logs in to their account, they will be required to reconfigure TFA for their account following the steps outlined in the Setting up TFA section.

Exporting the users' listing

When logged as an administrator, go to `/admin/people`. Click on the orange button at the bottom of the page (see screenshot below), and a CSV file will automatically be downloaded. Note that it will apply all the filters that may have been applied to the users listing.

<input type="checkbox"/>	VijayADMIN	Active	<ul style="list-style-type: none"> Content editor Client Admin 	6 months
<input type="checkbox"/>	Contenteditor	Active	<ul style="list-style-type: none"> Content editor 	6 months 1 week
<input type="checkbox"/>	admin	Active	<ul style="list-style-type: none"> Administrator 	7 months

No items selected

Action:

- Select -

Apply to selected items

CSV

DotDigital & Forms

For the current implementation of the DotDigital forms an administrator will have to publish the forms in DD before they can be added to the CMS.

Under Content – Surveys, pages and forms you will find a list of all forms available in DD. Select the form you wish to use. If you make any amends to the form you will need to republish before generating the embed code for use on the website.

After publishing click on the **generate embed code** button, copy this link for use in the Drupal CMS.

dotdigital JT Test Contact

Publish

Once a page has been published, it will be publicly available to everyone with the link.

1. Address:
This page is published on [r1.dotdigital-pages.com](https://r1.dotdigital-pages.com/v7LSM-PN/thank-you) with a friendly part of "Thank you".

2. Launch:
Republished on 10 Sep 2023 at 14:10
REPUBLISH **UNPUBLISH**

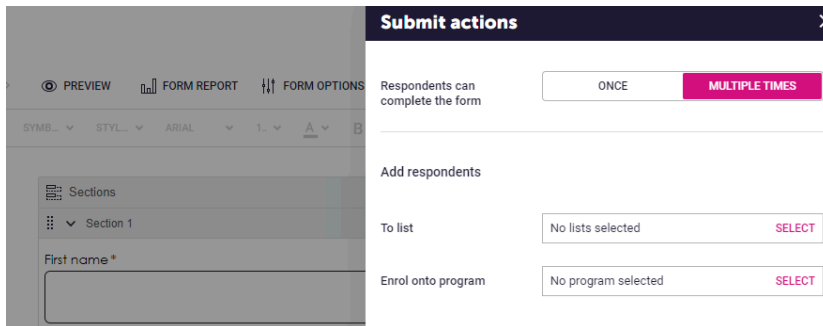
3. Generate embed or pop-over code:
GENERATE EMBED CODE **GENERATE POP-OVER CODE**

This page is live on: <https://r1.dotdigital-pages.com/v7LSM-PN/thank-you>
VISIT LINK
COPY LINK **SHARE ON TWITTER**

CLOSE

Notes under **Form Actions – Submit Actions** you need to make sure the 'Respondents can complete the form multiple times' is set. Otherwise the form will not appear after being used once.

This is also where you can set the data collection to be added to lists for easy reference.



Submit actions

Respondents can complete the form:

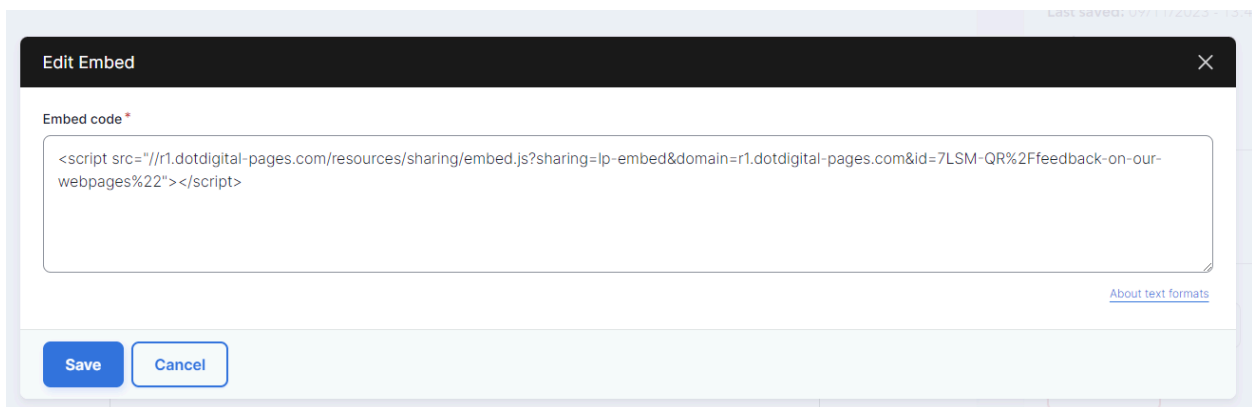
Add respondents

To list: [SELECT](#)

Enrol onto program: [SELECT](#)

Once in the CMS navigate to the page you want to add the form too.

Add a section to your page and then select the **Embed** content block. Here you will be asked to enter the URL of the form you copied from Dot Digital. Save the block and the form will show on preview of the page.



Edit Embed

Embed code *

```
<script src="//r1.dotdigital-pages.com/resources/sharing/embed.js?sharing=lp-embed&domain=r1.dotdigital-pages.com&id=7LSM-QR%2Ffeedback-on-our-webpages%22"></script>
```

[About text formats](#)

If the form is ever not present on a page this will more than likely be an issue with Dot Digital as this is an iframe element.

Reporting

Drupal offers a range of reporting, including revision logs as requested within the NFRs.

When a user makes a change on a page they should enter some information as to the change they have made in the revision log.

Home > > News 4

Edit News Article News 4 ☆

View **Edit** Delete Revisions

☒ Pinned

Title*
News 4

news article title
News article header goes here

^ news image

Published
Last saved: 07/18/2023 - 15:49
Author: admin

☒ Create new revision
Revisions are required.

Revision log message
Briefly describe the changes you have made.

Through **Reports > Recent Log Messages** you can select the type of activity you want to report on. Here you can see we have selected block content and content, and below it shows the most recent amends.

Recent log messages ☆

View Delete

The Database Logging module logs system events in the Drupal database. Monitor your site or debug site problems on this page.

Type	Severity
access denied	Emergency
block_content	Alert
content	Critical
cron	Error
file	Warning
menu	Notice
node	Info
page not found	Debug
paragraph	

Filter Reset

Type	Date	Message	User	Operations
content	07/21/2023 - 11:28	news_article: updated News 4.	ToniADMIN	View
block_content	07/20/2023 - 02:35	basic: updated Form Hubspot.	admin	

You can then go into the details if needed.



Back to site	
Manage	
Shortcuts	
ToniADMIN	
Content	Structure Appearance Extend Configuration People Reports Help
Type	content
Date	Friday, July 21, 2023 - 11:28
User	ToniADMIN
Location	https://qa.london-market-jv.co.uk/node/92/edit?destination=%2Fadmin%2Fcontent
Referrer	https://qa.london-market-jv.co.uk/node/92/edit?destination=/admin/content
Message	news_article: updated News 4.
Severity	Notice
Hostname	159.242.227.142
Operations	View

From the page you can see the information added by the user

Revisions for News 4 ☆	
View	Edit Delete Revisions
Revisions allow you to track differences between multiple versions of your content, and revert to older versions.	
Revision	Operations
07/21/2023 - 11:28 by ToniADMIN Test for revision log	Current revision
07/18/2023 - 15:49 by admin	Revert ▼
07/18/2023 - 15:49 by admin	Revert ▼



Secure Access Area

The Velonetic website has a designated secure access area. Within this secure area, content is created and grouped into secure groups. Authenticated users are then assigned relevant groups and provided access to the content.

Auth0

Velonetic utilises [Auth0](#) as a means of storing secure access user data, and providing a means of authentication into the secure access area of the site. This approach ensures that secure access user data is separated from Drupal, enhancing security and scalability.

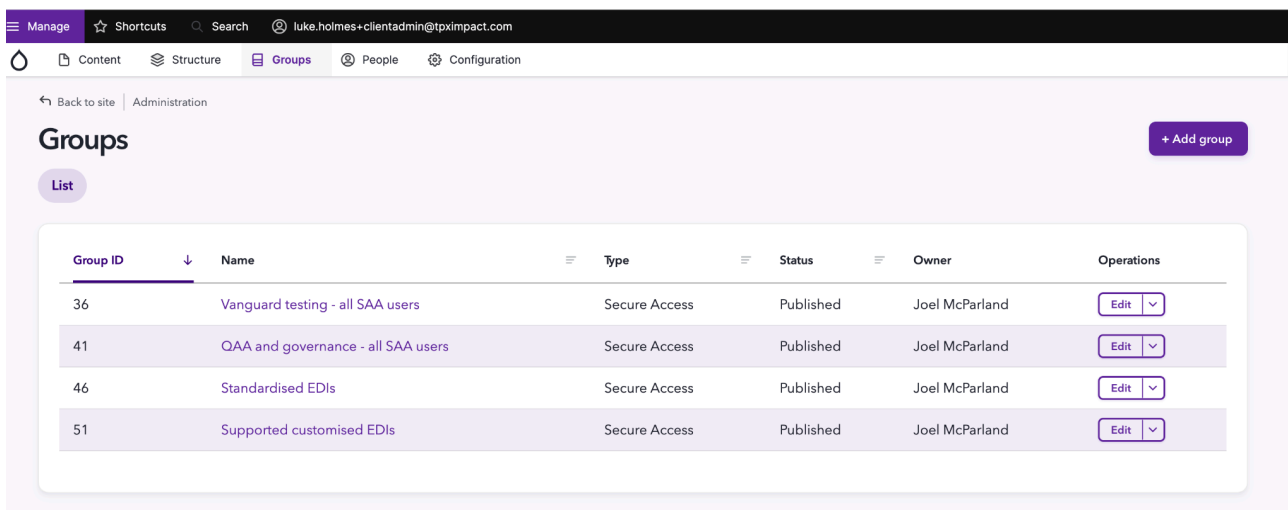
Secure Access Groups

Secure access groups can be managed from within the CMS to group content, and efficiently assign users with access to content.

Viewing Secure Access Groups

A list of secure access groups can be seen by navigation to the following page, via the admin menu.

Groups > List [<https://www.velonetic.co.uk/admin/group>]



Group ID	Name	Type	Status	Owner	Operations
36	Vanguard testing - all SAA users	Secure Access	Published	Joel McParland	Edit
41	QAA and governance - all SAA users	Secure Access	Published	Joel McParland	Edit
46	Standardised EDIs	Secure Access	Published	Joel McParland	Edit
51	Supported customised EDIs	Secure Access	Published	Joel McParland	Edit



Creating Secure Access Groups

Groups > List > Add group [https://velonetic.co.uk/group/add/secure_access]

The screenshot shows the 'Groups' management interface. At the top, there's a navigation bar with 'Content', 'Structure', 'Groups', 'People', and 'Configuration'. Below this, a breadcrumb trail shows 'Back to site' and 'Administration'. The main heading is 'Groups', with a '+ Add group' button on the right. A 'List' tab is selected. The table below lists four groups:

Group ID	Name	Type	Status	Owner	Operations
36	Vanguard testing - all SAA users	Secure Access	Published	Joel McParland	Edit
41	QAA and governance - all SAA users	Secure Access	Published	Joel McParland	Edit
46	Standardised EDIs	Secure Access	Published	Joel McParland	Edit
51	Supported customised EDIs	Secure Access	Published	Joel McParland	Edit

Step 1: From the group listing page, click the + Add group button.

The screenshot shows the 'Add Secure Access' form. The navigation bar is the same as the previous page. The breadcrumb trail shows 'Back to site' and 'Add group'. The main heading is 'Add Secure Access'. The form is divided into two main sections: 'Group details' and 'Revision information'. In the 'Group details' section, there's a 'Title' field with the value 'Vanguard testing' and a 'Homepage' field with the value 'Vanguard testing (446)'. Below the 'Homepage' field, there's a note: 'Assign an SAA Page that should be used as the secure group home page. This page is where users are taken to when clicking on the area from their dashboard.' In the 'Revision information' section, there's a 'Revision log message' field with a placeholder text: 'Briefly describe the changes you have made.' The 'Published' checkbox is checked. At the bottom, there's a 'Create secure access group' button.

Step 2: Enter the title of your group, and the homepage. If you've not created a home page for the group yet, see instructions [here](#).

Editing Secure Access Groups

To edit an existing secure access group, click on the **Edit** button displayed on the right hand side of the [group listing page](#).

The screenshot shows a web application interface for editing a secure access group. At the top, there is a navigation bar with icons for Content, Structure, Groups, People, and Configuration. Below this, a breadcrumb trail reads 'Back to site | Standardised EDIs / Edit Group'. The main heading is 'Edit *Standardised EDIs*'. Below the heading are four tabs: 'Edit' (active), 'Delete', 'Members', and 'Content'. The form is divided into two main sections. The top section, 'Group details*', contains a 'Title*' field with the value 'Standardised EDIs' and a 'Homepage' field with the value 'Standard Electronic Data Interchange (EDI) information (456)'. A small search icon is visible in the homepage field. Below the homepage field is a note: 'Assign an SAA Page that should be used as the secure group home page. This page is where users are taken to when clicking on the area from their dashboard.' The bottom section, 'Revision information', shows 'No revision' and a 'Create new revision' toggle switch. Below this is a 'URL alias' field with the value 'No alias'. At the bottom left of the form are two buttons: 'Save' and 'Delete'.

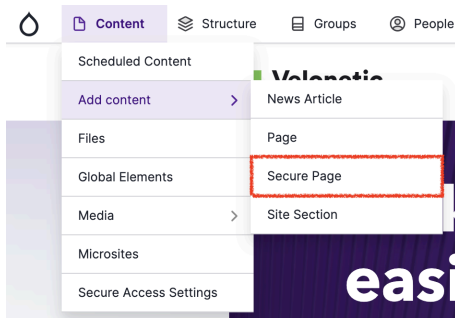
From this screen, you can edit the **Title** of the group – and the assigned **Homepage***

*The homepage is the page users will see when clicking through to the group from their dashboard. A homepage should be created as a **Secure Page** content type.

Creating Secure Content

Content > Add Content > Secure Page [https://velonetic.co.uk/node/add/saa_page]

A secure content page must be added as a **Secure Page**.



Step 1: Add a new Secure Page. From the admin menu: **Content > Add Content > Secure Page**

A screenshot of the 'Create Secure Page' form. At the top, there's a navigation bar with 'Content', 'Structure', 'Groups', 'People', and 'Configuration'. Below this, a breadcrumb trail shows 'Back to site' and 'Add content'. The main heading is 'Create Secure Page'. On the right, there's a 'Continue' button with an instruction '4. Click continue to go to page builder' and an arrow pointing to the button. The form has two main sections. The first section is 'Title*' with a text input field containing 'Vanguard home page' and an instruction '1. Enter the title' with an arrow pointing to the field. The second section is 'Secure Access Groups'. It has a sub-section 'Groups' with the text 'Not yet added to groups.' and an instruction '2. Search for the name of your Group.' with an arrow pointing to a search input field. This search field contains 'Vanguard testing - all SAA users (36)'. Below the search field is an 'Add to Group' button with an instruction '3. Add the page to the group.' and an arrow pointing to the button.

Step 2: Fill out the **title** field and using the **Secure Access Group(s)** field, assign the page to your chosen group(s). Click continue to the page builder interface and add any content components to the page that are required.

Secure components

Secure area pages can be built using the standard [content components](#) used on non secure pages. Additionally to the standard components, secure pages have a **Secure Documents** component. This allows the editor to add a list of documents to a secure page, ensuring that the uploaded files are not made available to anybody outside of the secure group.

Creating a group homepage.

Each group needs to be assigned a homepage. The homepage is a Drupal secure page that Editors can build, utilising the majority of content components. This is the first page an end-user will see when accessing the group from their dashboard.

To create a group home page is the same process as [creating a secure page](#)..

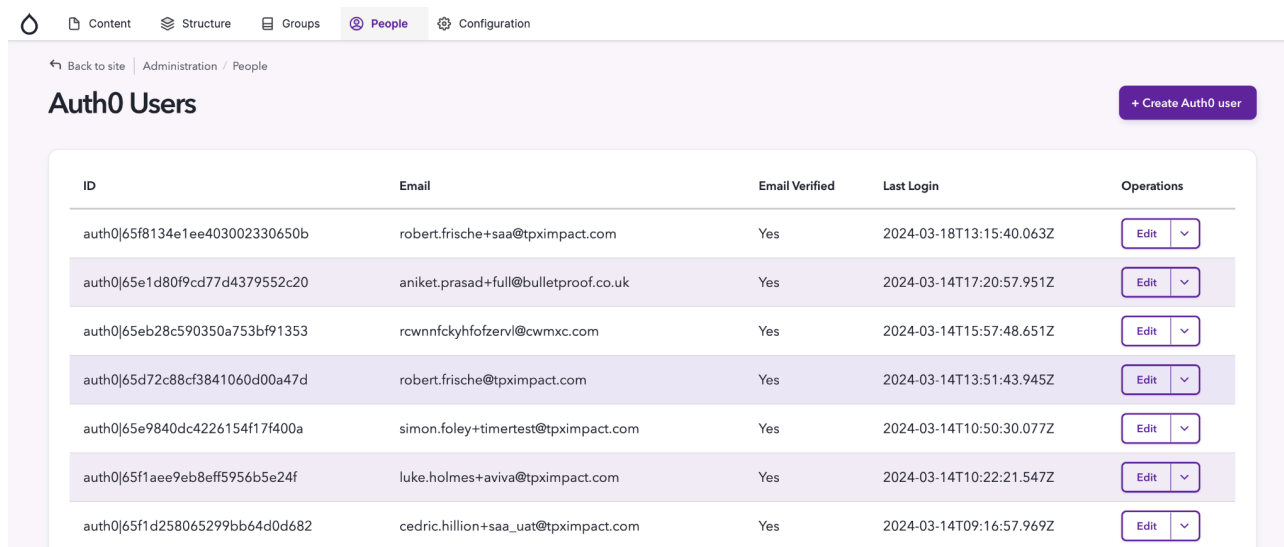
Secure Access User Management

Whilst Secure Access user data is securely stored in AuthO, all user management activities take place within the Drupal content management system.

Secure Access Users

A full list of secure access (AuthO users) can be found within the CMS here:

People > AuthO Users [<https://velonetic.co.uk/admin/people/authO/list>]

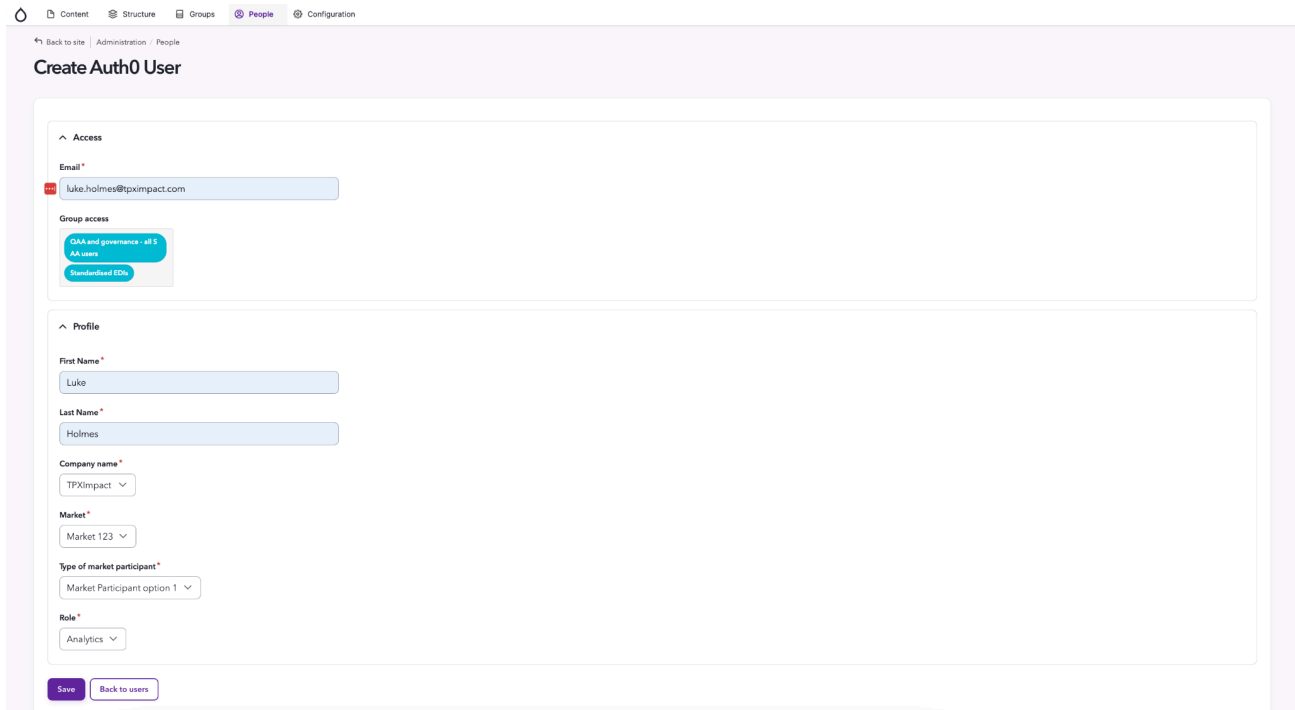


ID	Email	Email Verified	Last Login	Operations
auth0 65f8134e1ee403002330650b	robert.frische+saa@tpximpact.com	Yes	2024-03-18T13:15:40.063Z	Edit ▼
auth0 65e1d80f9cd77d4379552c20	aniket.prasad+full@bulletproof.co.uk	Yes	2024-03-14T17:20:57.951Z	Edit ▼
auth0 65eb28c590350a753bf91353	rcwnnfckyhfofzervl@cwmx.com	Yes	2024-03-14T15:57:48.651Z	Edit ▼
auth0 65d72c88cf3841060d00a47d	robert.frische@tpximpact.com	Yes	2024-03-14T13:51:43.945Z	Edit ▼
auth0 65e9840dc4226154f17f400a	simon.foley+timertest@tpximpact.com	Yes	2024-03-14T10:50:30.077Z	Edit ▼
auth0 65f1aee9eb8eff5956b5e24f	luke.holmes+aviva@tpximpact.com	Yes	2024-03-14T10:22:21.547Z	Edit ▼
auth0 65f1d258065299bb64d0d682	cedric.hillion+saa_uat@tpximpact.com	Yes	2024-03-14T09:16:57.969Z	Edit ▼



Adding Secure Access Users

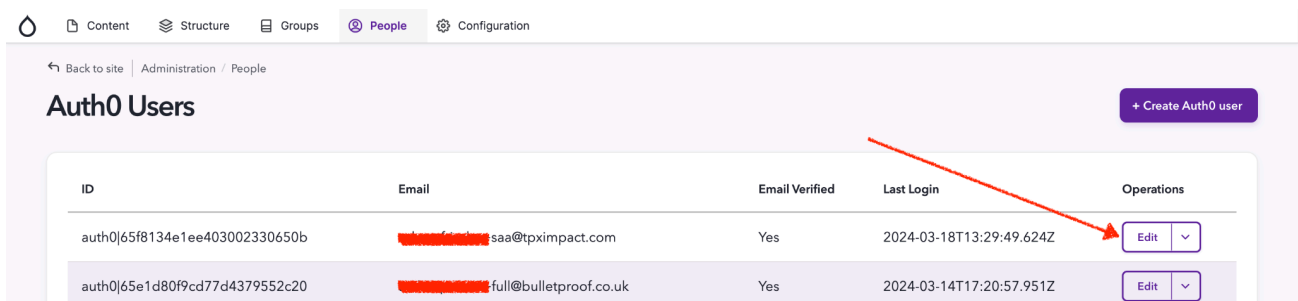
To add a secure access user, click the + Create Auth0 user button from the [user listing screen](#). This will open up a page with a form where user details can be entered.



In this form, you can enter the user email address, name, profile data and select any secure groups the user should have access to. Once details are entered, click **Save**. This will store the user into Auth0 and send over the welcome email to the end user where they can begin their registration journey.

Editing Secure Access Users

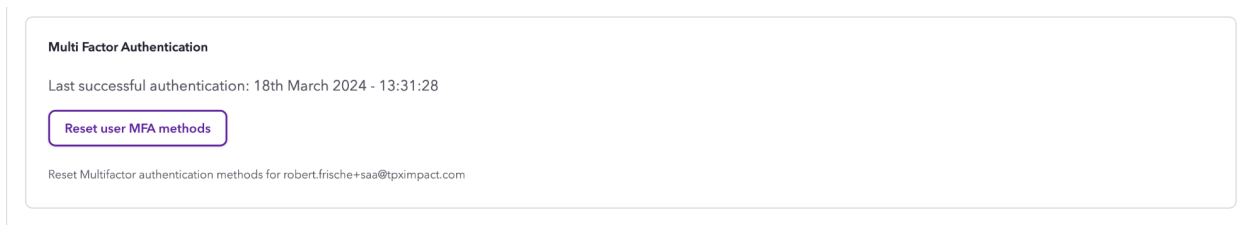
Go to the [user listing page](#), and click **edit** on the user that needs editing. The form on this page will contain the user details stored in Auth0 for this user. You can update the values and save the form to update the user details.



ID	Email	Email Verified	Last Login	Operations
auth0 65f8134e1ee403002330650b	[REDACTED]saa@tpximpact.com	Yes	2024-03-18T13:29:49.624Z	Edit ▼
auth0 65e1d80f9cd77d4379552c20	[REDACTED]full@bulletproof.co.uk	Yes	2024-03-14T17:20:57.951Z	Edit ▼

Resetting User MFA

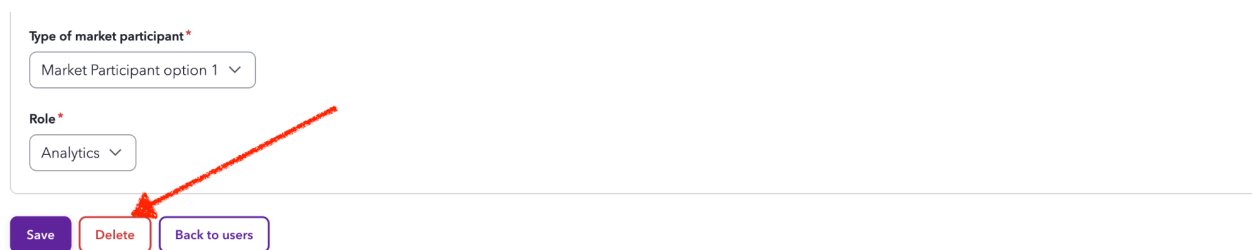
If the secure access user loses access to their MFA access codes, they will not be able to log in to the secure access area. An administrator is able to reset their MFA settings via the user edit screen. This will allow the user to re-enroll in MFA with a new Authenticator application.



The screenshot shows a 'Multi Factor Authentication' section. It displays 'Last successful authentication: 18th March 2024 - 13:31:28'. Below this is a button labeled 'Reset user MFA methods'. At the bottom, it states 'Reset Multifactor authentication methods for robert.frische+saa@tpximpact.com'.

Deleting a secure access user

If a user needs to be blocked or removed from the secure access area, an administrator is able to delete their account by editing the user, and clicking on the **Delete** button.



The screenshot shows a user edit form. It has two dropdown menus: 'Type of market participant*' with 'Market Participant option 1' selected, and 'Role*' with 'Analytics' selected. At the bottom, there are three buttons: 'Save' (purple), 'Delete' (red with a white border), and 'Back to users' (purple). A red arrow points to the 'Delete' button.

Deleting a user account here will remove all trace of the user from Drupal and Auth0. Once the user is deleted, they will not be able to log in to the secure area.

Secure Access Media Management

Any secure files should be uploaded to the **Secure Documents** component. This will ensure that the documents are uploaded to the private file system within Drupal. When a user tries to download a document from the private file system, access checks are run to make sure they are a secure access user with the required permissions to view the file.

Secure Access settings

See details here

(https://docs.google.com/document/d/1j_2c4dxQ1s9qX3ljMpV5--s2iiOpkkyGwhA8sekU2U/edit#heading=h.7lbvpkpOqf3g) for amending the copy of the Profile, Dashboard, Logging, account dropdown and T&C pages.



Appendix

Meta Tags

1. **Page Title:** It's the title of your web page that appears as the headline in search results and the browser's title bar. Make it clear, concise, and appealing to attract visitors.
2. **Description:** A short summary of your web page's content that shows up beneath the title in search results. Write an engaging description to entice people to click on your page.
3. **Abstract:** This field is not commonly used. It's similar to the description and provides a brief summary of your page's content. However, it's not widely supported by search engines.
4. **Keywords:** This field was once important but has lost significance. It allowed webmasters to list relevant keywords related to their content. However, major search engines now don't consider it for ranking purposes. So, it's not as important as it used to be.

In summary, the page title and description are crucial for search engine visibility and enticing users to click on your page. The abstract is not widely used, and the keywords field has diminished in importance. Focus on creating valuable content and using accurate meta tags to describe your web pages.

Metadata [node:title][site:name]:

[node:title] and [site:name] are tokens that can be used within the Meta Tags module in Drupal. Tokens are placeholders that are dynamically replaced with actual values when the page is rendered.

1. **[node:title]:** This token represents the title of a specific page or content item on your website. It dynamically inserts the actual title of that page into the meta tags. For example, if the page is titled "About Us," using [node:title] as a token will display "About Us" in the meta tags.
2. **[site:name]:** This token refers to the name of your Drupal website. It inserts the actual name of your site into the meta tags. For instance, if your site's name is "My Drupal Site," using [site:name] as a token will display "My Drupal Site" in the meta tags.

These tokens help customise the meta tags by automatically including the relevant page title or your site's name, making them more specific and tailored to each page or your overall brand.

