WEBSITE DEVELOPMENT & MANAGEMENT

REFERENCE GUIDE

For Member Organization Website Editors   **August, 2024**
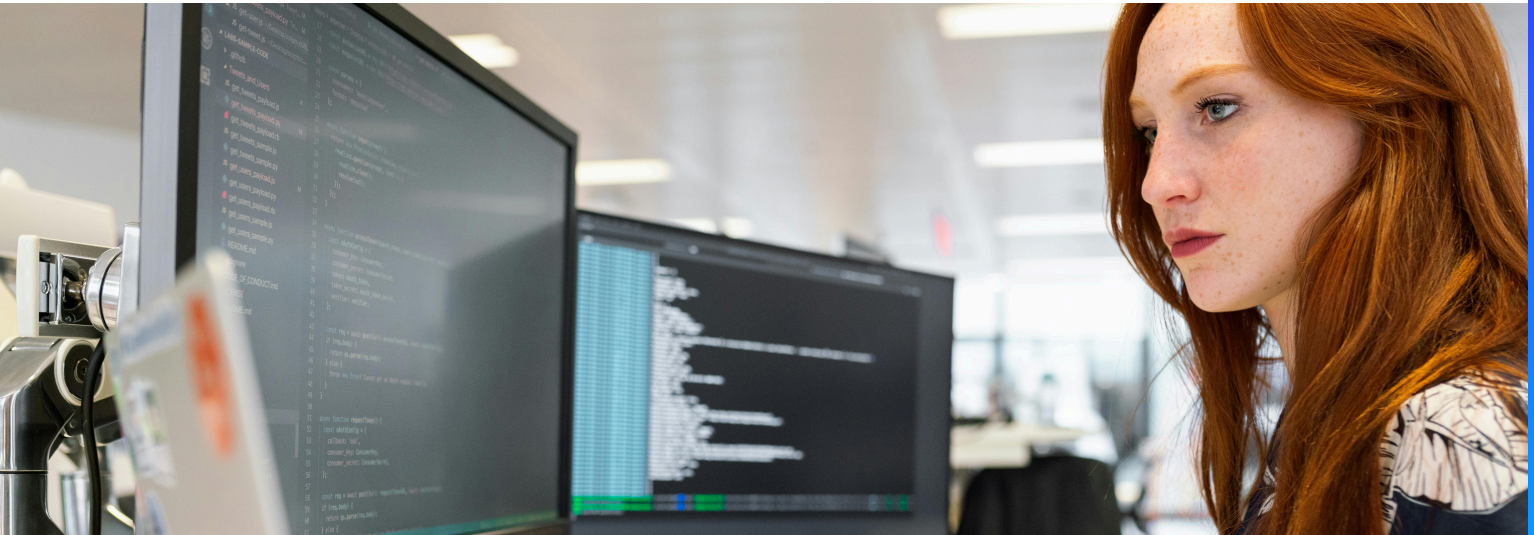
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THIS DOCUMENT

Welcome Reader!

This is the Website Management and Development Reference Guide! This comprehensive document is designed to serve as your go-to resource for all aspects of managing and developing your GRAV CMS based Member Organization (MO) website. Whether you are a seasoned web developer or a newcomer to website administration, this guide provides valuable insights, an explanation on the total infrastructure, and practical instructions to help you effectively build, maintain, and enhance your website for your MO.

As a member who is responsible for managing and developing your MO website - this guide will assist you with the knowledge to do exactly what you need and what you can do as an MO editor. However, if there is anything you need assistance with, please email CASARA National at casara@casara.ca for further discussion.

GRAV CMS

GRAV CMS is an open-source, flat-file content management system (CMS) known for its speed, simplicity, and flexibility.

Unlike traditional database-driven CMS platforms, GRAV uses a flat-file architecture, which means it stores content in text files rather than a database. This approach offers several advantages, including improved performance, ease of deployment, and straightforward backups.

This makes it ideal for personal or corporate informational websites that want an alternative CMS to other traditional ones that exist on the marketplace.

GRAV ADMIN AREA

Website Link: *https://<< Your MO Website >>/control*

For Example:
CASARA National Site – *https://casara.ca/control*
CASARA AB – *https://ab.casara.ca/control*

Please Note: The GRAV Content Management System is linked with TMMS for user account permission and login authentication. In order to access this page, you will need to be set as a website editor within TMMS by your MO Director (Access Permission Setting). This is covered in the Security & Permissions section.

Firstly, lets start with your website admin area. The admin area is the central backend that empowers us to manage aspects of your website efficiently. Whether you are updating content or configuring settings the admin area provides you with all the tools you need in one centralized location. Here is a section by section walkthrough outlining each area and its main functions.

1) Dashboard

Your Dashboard is a main location where you view notifications from GRAV, news feed items, and a log history of what pages you recently edited. You won't need to access much on this page operationally.


National View

However, national can clear system cache stored or check for system updates within the Content Management System. You will notice you do not have this option in the top right of your screen.

Please Note: since you have MO level access permissions, you will not be able to use this area of the site. However, it's important to know that it does exist as cache on the server can sometimes interfere with image loading in your browser when viewing the site after making an update (rare).

2) Configuration

The GRAV CMS Configuration page is the central hub for managing the settings and preferences of the GRAV website. This page is designed to give you control over various aspects of your site, ensuring it runs smoothly and meets your specific needs. However, these are set from the national website to utilize the existing defaults. The Configuration page is divided into five main sub-tabs: System, Site, Media, Security, and Info.
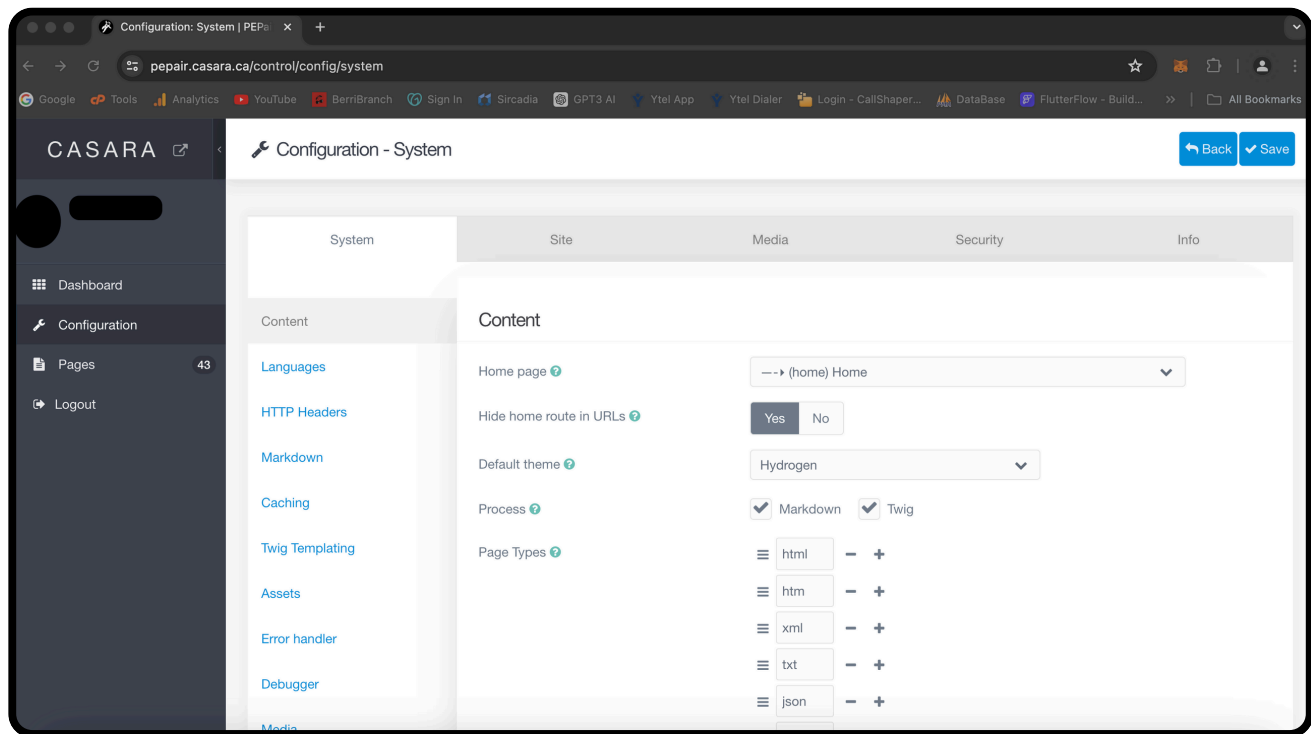
MO View

A) System

The System tab allows you to configure the core settings of your site. Here, you can adjust performance settings, such as cache and session management, as well as define system-wide behaviors like timezones, languages, and error handling. This tab is essential for ensuring your site operates efficiently and is tailored to your server environment.

B) Site

The Site tab focuses on the general settings of your website. This includes the site title, default language, and metadata information such as descriptions and keywords. These settings are crucial for your site's identity and for improving its search engine visibility. You can also manage the contact email and other basic site configurations here.

C) Media

In the Media tab, you manage the handling of various media types used on your site, including images, videos, and documents. This tab allows you to set default settings for media uploads, such as allowed file types and image compression options. By configuring these settings, you can ensure that your media content is optimized and properly managed.

D) Security

The Security tab is where you configure the security settings for your GRAV site. This includes settings for user authentication, password policies, and other security measures to protect your site from unauthorized access and potential vulnerabilities. Properly configuring these settings is essential for maintaining a secure and safe online presence.

E) Info

The Info tab provides a detailed overview of your GRAV installation. Here, you can find information about your server environment, including PHP version, installed GRAV plugins, and other technical details. This tab is particularly useful for troubleshooting and ensuring your system meets the necessary requirements for optimal performance.

By utilizing the GRAV CMS Configuration page and its sub-tabs, you can effectively manage and customize your website settings to ensure it is up to your requirements.

Please Note: Based on the utilization of the default settings, we recommend that you do not change these unless it is needed for certain functionality.

3) Accounts

The Accounts page in GRAV CMS is a critical component for managing user profiles and access permissions for your website. It allows administrators to control who can access the site and what they can do once they are logged in. This is controlled by CASARA National, but utilizes TMMS profiles.

If you are looking to change or modify who can access different pages on the site, this will be discussed in other sections.

Please Note: since you have MO level access permissions, you will not be able to use this area of the site. However, it's important to know that it does exist.

4) Pages

The Pages section is where you will spend most of your time as you build and maintain your website. It is designed to be intuitive and user-friendly, allowing you to quickly create new pages, organize them into a hierarchy, and edit content with ease. Whether you are adding a simple blog post or a complex landing page, the Pages section provides the tools and flexibility you need.
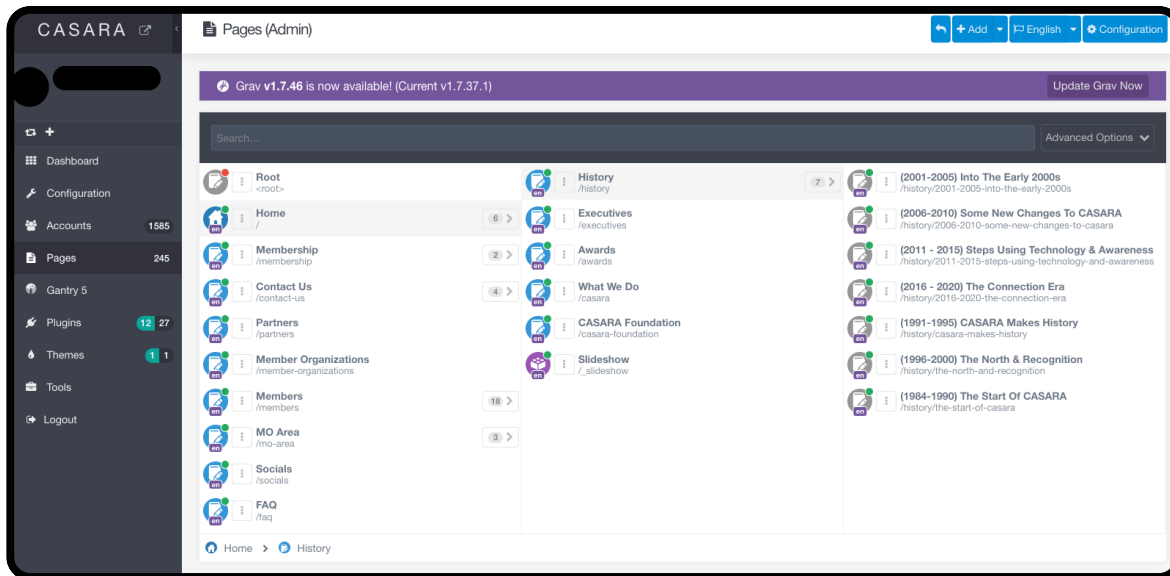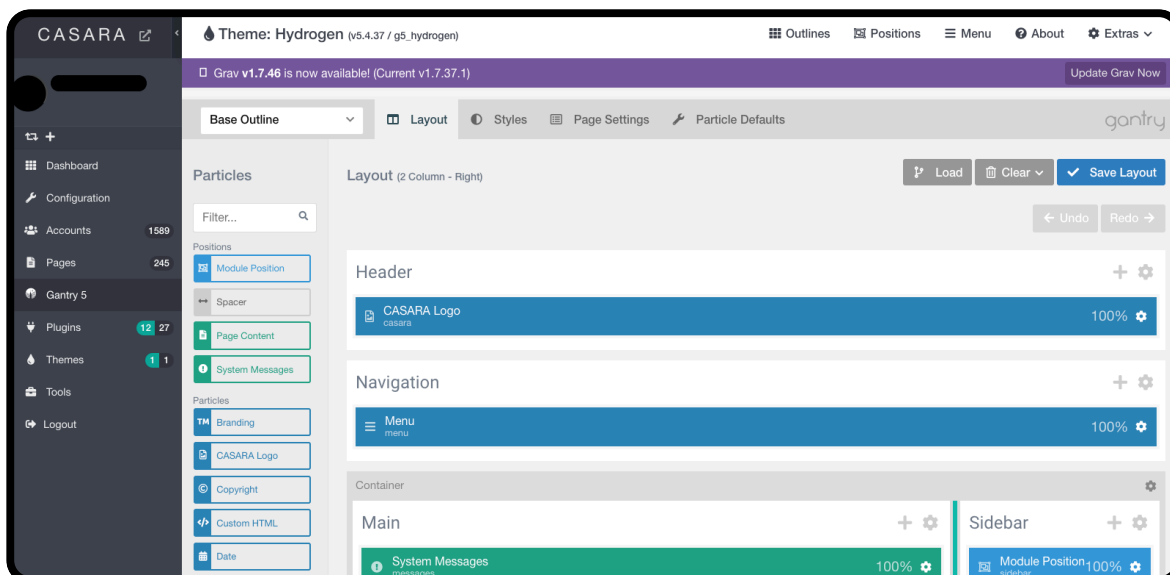

National View

5) Gantry 5

The Gantry 5 page is your core location to edit the Gantry 5 theme settings that are in place for your website. This allows the editor to create custom theme settings (what is used for custom Member Organization displays) in order to configure certain layout conditions to exist. You can also modify colours, menus, and more.

Please Note: since you have MO level access permissions, you will not be able to use this area of the site. However, it's important to know that it does exist.
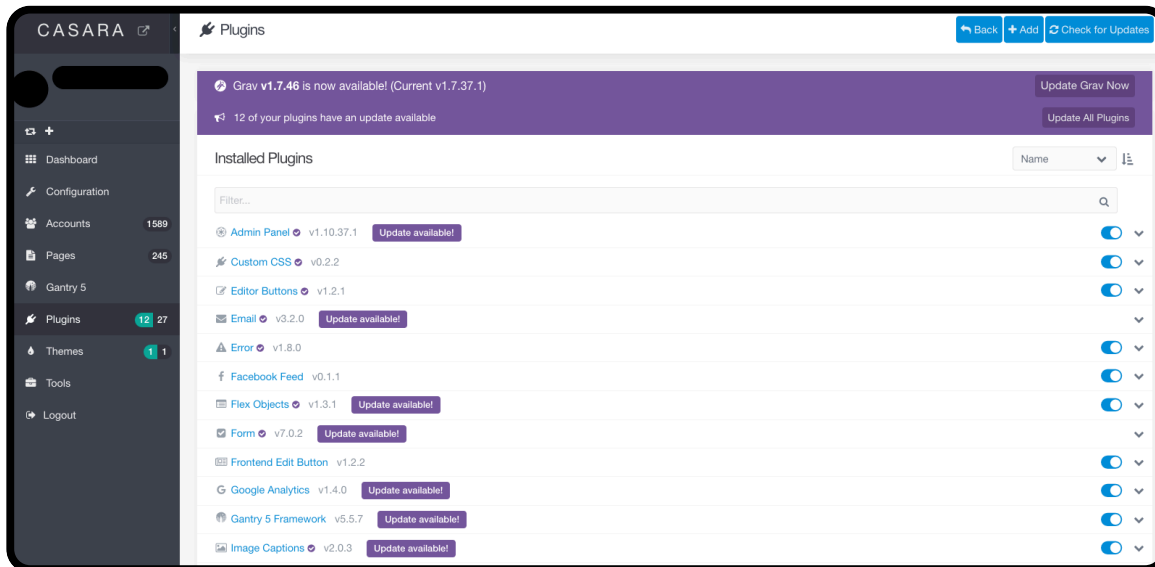

National View

6) Plugins

The GRAV CMS Plugins page is your primary destination for managing the plugins used on your website. This page allows administrators to install, update, and configure various plugins that extend the functionality of the GRAV CMS. You can enable or disable plugins, adjust their settings, and access plugin-specific features to tailor your site's performance and capabilities to your needs.

Please Note: since you have MO level access permissions, you will not be able to modify the plugin settings on this page. However, it's essential to be aware of its existence and functionality.

National View

6) Themes & Tools

The GRAV CMS Themes page is your main hub for managing the visual appearance of your website. This page allows administrators to install, activate, and customize themes to control the site's look and feel. The Tools page allows administrators to utilize features like backups, site health checks, and cache management to ensure the site runs smoothly and efficiently. You can perform maintenance tasks, monitor site performance, and troubleshoot issues using the available tools.

Please Note: since you have MO level access permissions, you will not be able to modify the plugin settings on this page. However, it's essential to be aware of its existence and functionality.

Now you have an outlook at the various admin pages that exist for the GRAV CMS as a website manager for your MO. This context will aid you and your ability to make site changes and request the necessary modifications you may want to make with your MO website. As always if you have any questions or concerns, you can always email CASARA National at **casara@casara.ca**

HOW TO SERIES

This series will teach you how to edit the pages of your website. First we will start with standard things to know before you make page edits. Then, we will dive into "How To" do various edits such as uploading/displaying images, documents, and much more.

THINGS TO KNOW

1) How to add/remove/duplicate pages
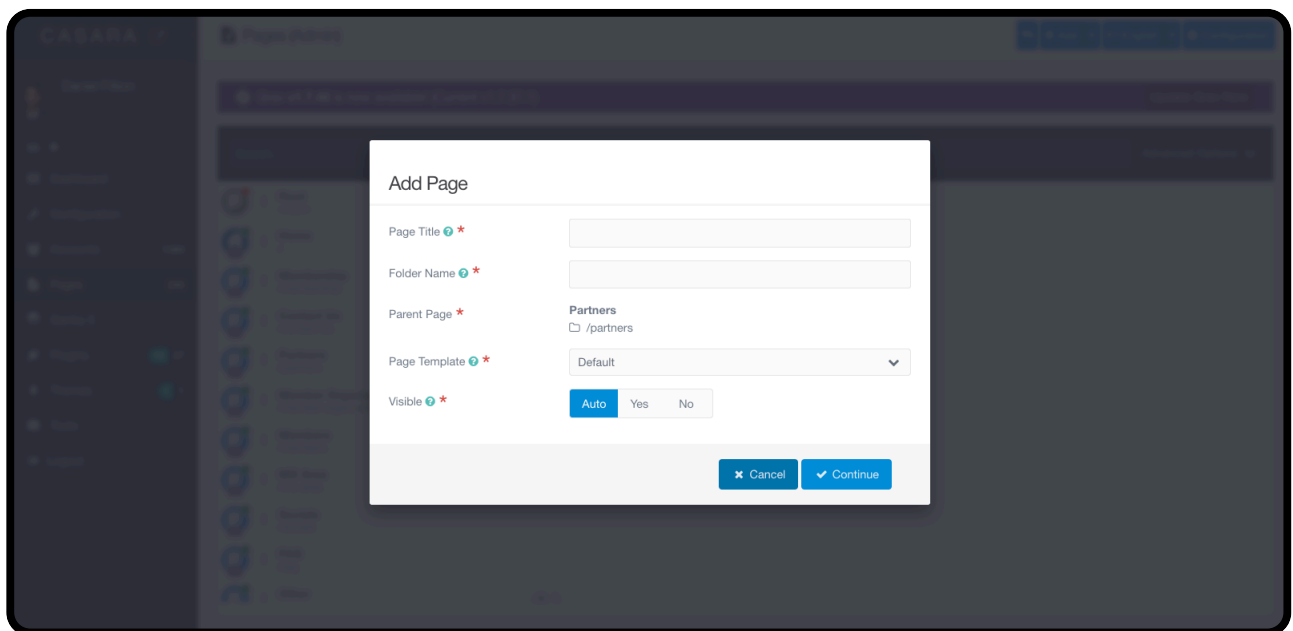
National View

Add New Page:

1) Click the "+ Add" button in the top right of the pages area.

2) Then, fill out the following details for this page (as seen above)

- **Page Title**: What you are going to call the page

- **Folder Name:** This is what the folder (file) will be called on the server. This will auto populate based on the Page Title you enter.

- **Parent Page:** This allows you to set the page level for the new page at the normal level (root) or nest pages within others.

- **Page Template:** This allows you to set the template of the page. Default is recommended for standard pages.

- **Visible:** This allows you to set if the page will be visible or invisible to site visitors. This is particularly useful when making menu items visible or not from your menu drop downs.

3) Click "Save" on the newly generated page. This will lock in the new page you have created, so that you can freely start editing it further.

Please refer the image on the right which showcases the notification to ave the page and the location of where the save button is.
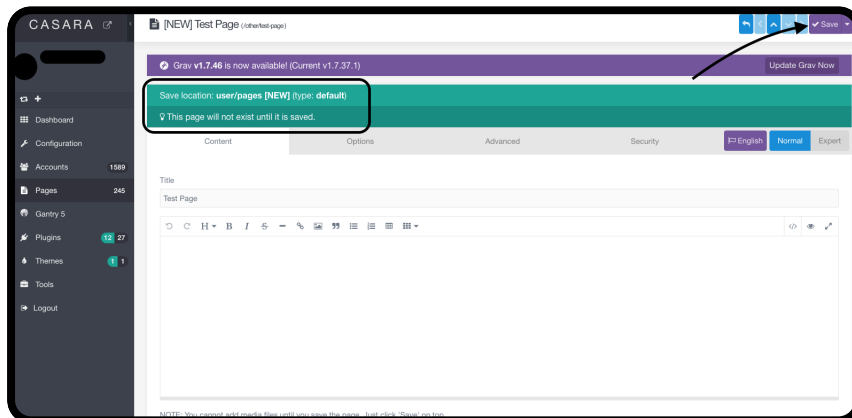
National View

<u>Delete Page:</u>

1) Click the three dots ⋮ on the page you want to delete within the pages area to open the dropdown (image below).
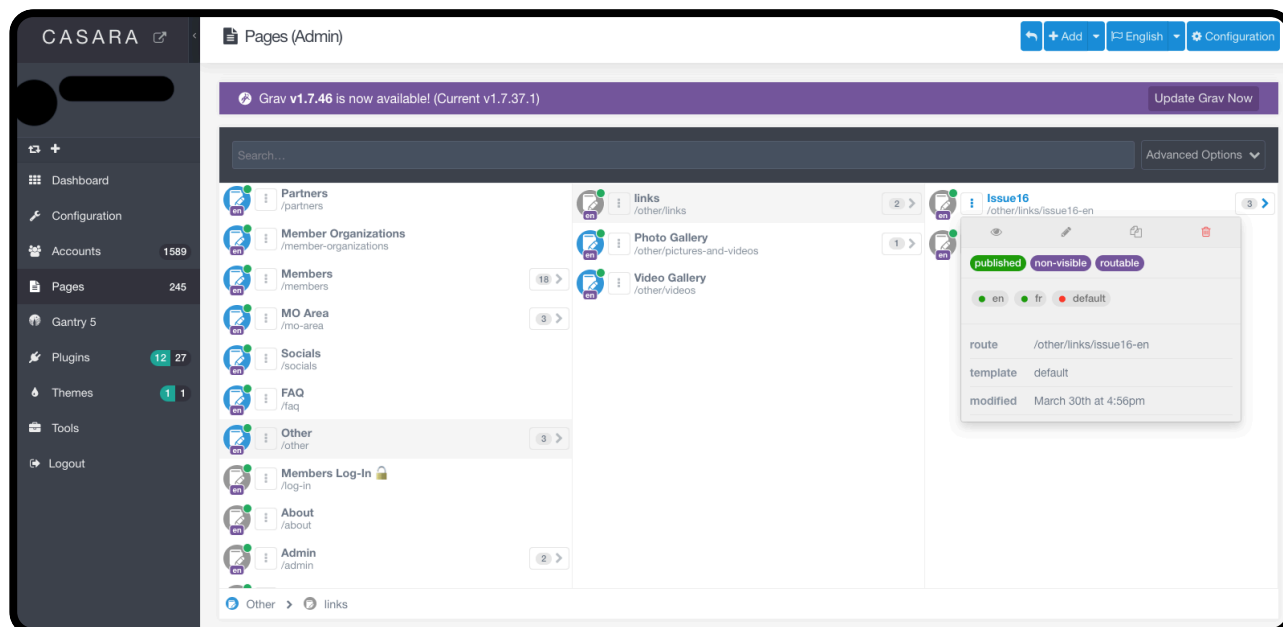
2) Click the trash icon 🗑 to delete the page

Duplicate Page:

1) Click the three dots ⋮ on the page you want to delete within the pages area to open the dropdown (image below).

2) Click the trash icon 🗐 to delete the page

Click the "Continue" button on the pop up message/modal in order to finalize the deletion (pop up may not occur). That's it, you deleted the page!
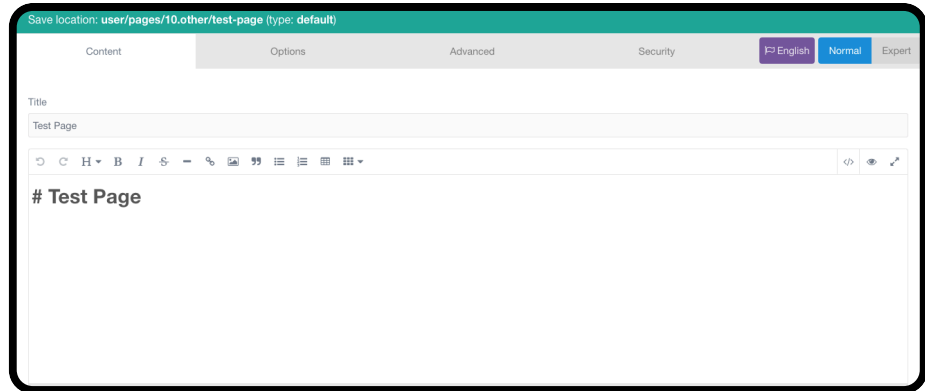

National View

2) How to add Headings

When adding headings to your page, you can utilize GRAV's format by adding "#" in front of the text you want to for a heading.

The quantity of "#" symbols will dictate the heading number as shown below.

Title = H1
Title = H2
Title = H3
Title = H4
Title = H5
Title = H6

You can alternatively click on the "H" symbol from the page editing tool menu in order to select what Heading style you want for your text.

National View

3) How to Add Images

Here are the steps in order to add an image to your website page.

1) Click on the Page Media bar at the bottom of the page & upload an image.

2) Once uploaded (denoted by checkmark) you can click the "+" icon on the image itself to add it to the page as seen below.
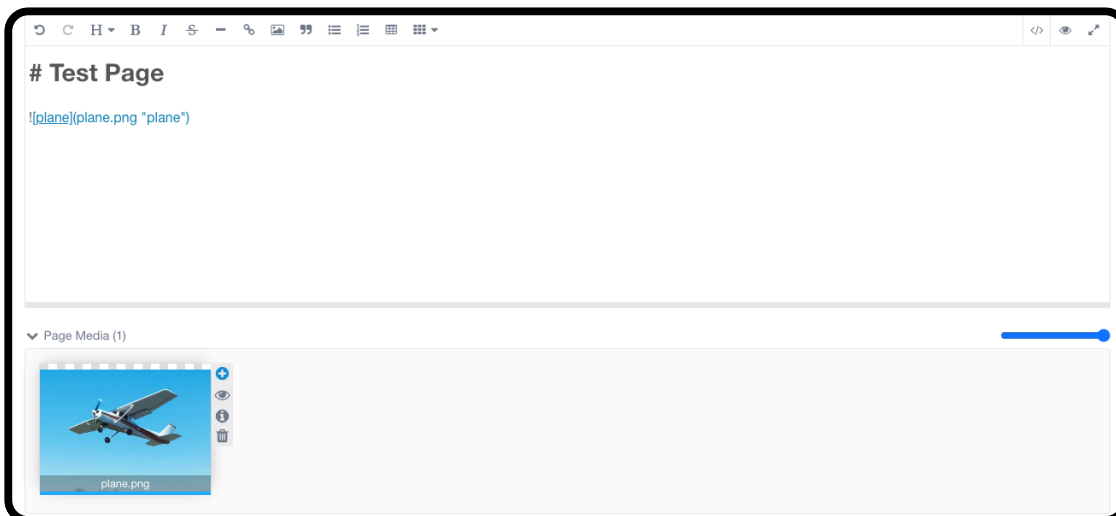
National View

Please Note: If you are looking to style your image with CSS formatting, you can do so by adding the style tag to the image as noted here for example: ![plane](plane.png?style=margin-left:0;)

4) How to Embed Video Content

If you're looking to add some external video on the internet on your website (i.e. YouTube), you can do so by conducting the following.

1) Add this HTML markup to your website in order to have a scrollable list on the page.

- <div style=overflow-x:hidden;overflow-y:scroll;height:1000px;>

- </div>

2) You can either copy provided embed HTML from the video source or add this to your page.

- <iframe width="100%" height="478px" style="border-radius:5px;" src="" frameborder="0" allow="accelerometer; autoplay; clipboard-write; encrypted-media; gyroscope; picture-in-picture; web-share" allowfullscreen></iframe>

3) From there, make sure to add the correct "src=" address from the internet as seen below.
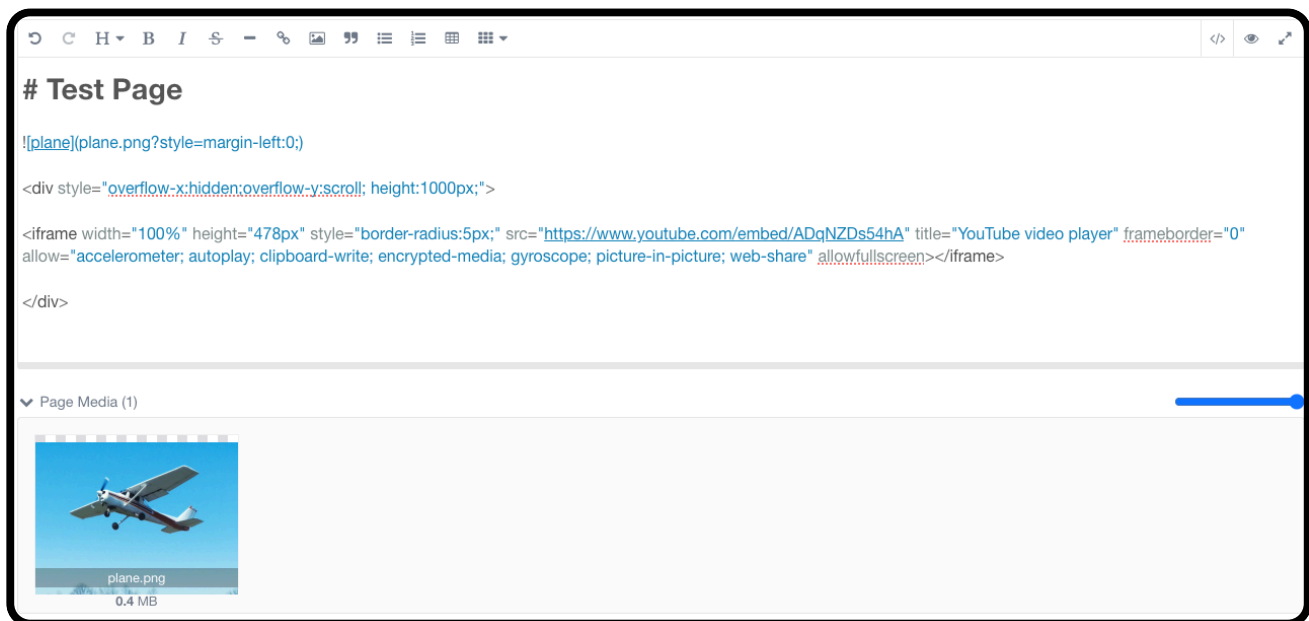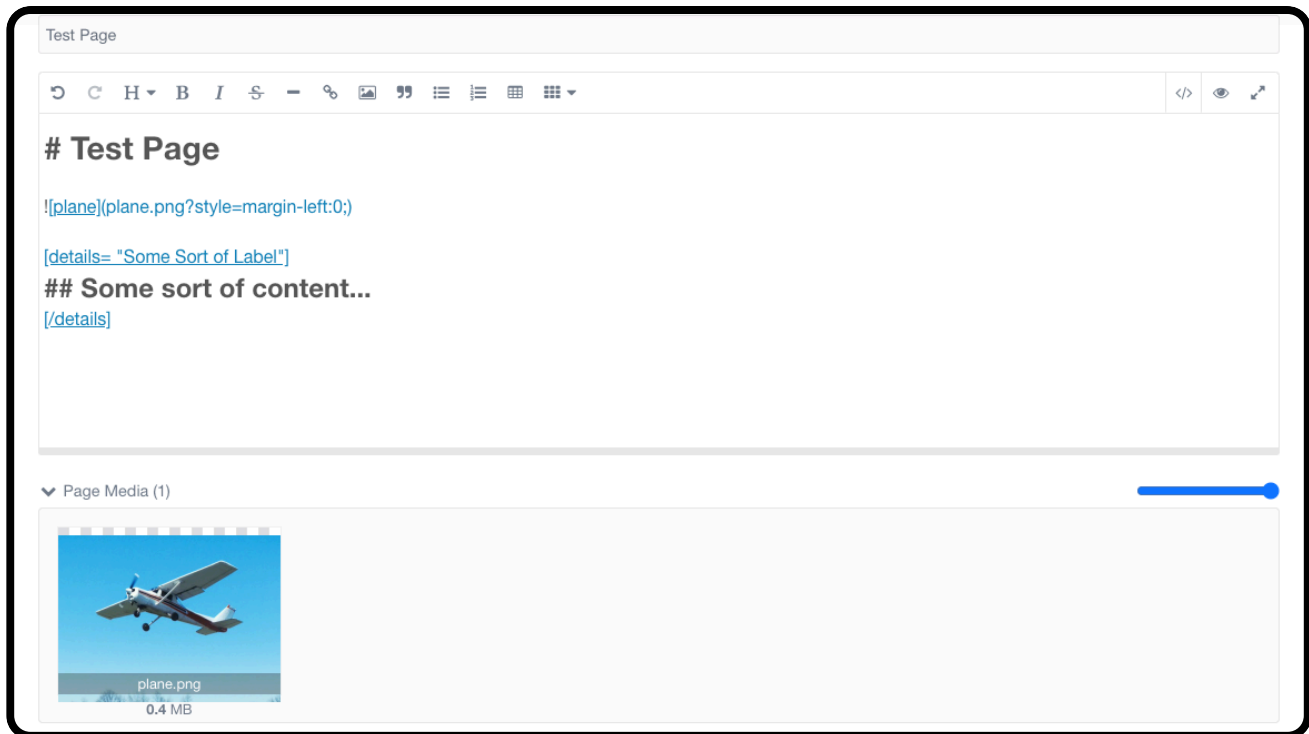

National View

Please Note: due to the higher file sizes for videos, we recommend you do not upload images to the webserver. Embedding videos greatly reduces the total storage consumed. Platforms like Youtube, Vimeo, and SharePoint can serve as a great location for you to upload and embed video content for your website.

5) How to Add Hidden/Expandable Content

If you want to add an expandable tab to hide content on initial page load, while giving members the ability to open areas further, then please use the following GRAV markdown below.

National View

Example Tags

[details= "Some sort of Label"]
Some sort of content
[/details]

The "details" tags above will allow for a dropdown tab to appear on your website page, labelled as the tag label you insert. Once clicked, it will open the tab and display the contents contained in between the tags. This is commonly used for display documents/manuals on the national and MO websites.

In the next page we will look at adding/modifying documents to your page using expandable tags.

6) How to Upload/Update Documents

Uploading or updating your documents can be a common task for web editors on their website. If you would like to upload or update your document file for you MO site, please follow the steps below. Please Note: all national based documents that are linked to SharePoint <u>DO NOT</u> need to be updated, since the src link will be connected to the most current version. This concept is talked about here: **Page 25**
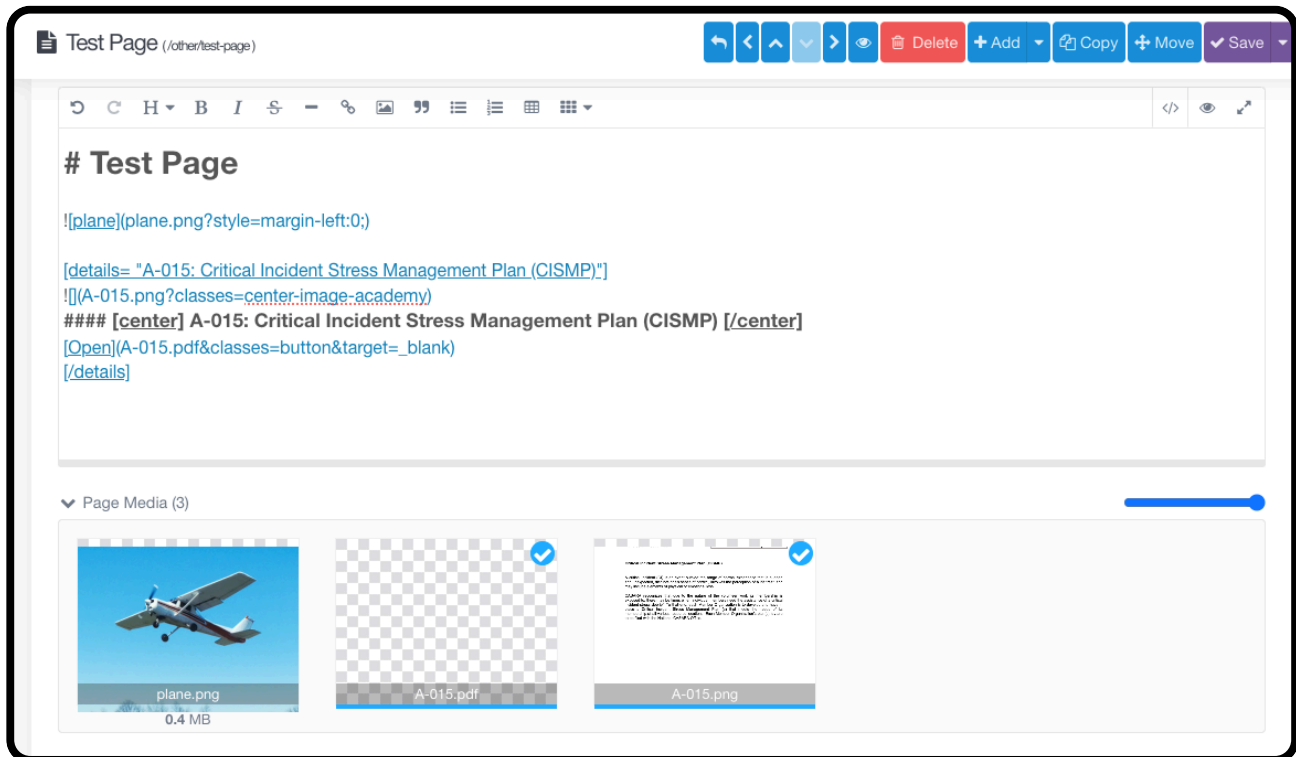
National View

To upload a new document, please follow these steps.

1) Upload PDF file to the page media area.
2) Upload any associated image you want to support the document(s) – optional
3) Then add the [details] [/details] tag to the page editor
4) Fill in the contents of within your hidden/tab area

- **Add Image**

Make sure to add the (?classes=center-image-academy) as seen above in order to have a formatted image display for your document.

- **Add Document Title**

You can add a document title with any heading level, but we recommend the above.

- **Add Document Link**

Please hover over the file in the Page Media area, then click the "+" icon. If you want a button to open the document, please use the formatting as seen above. Done – Now you will have the document added

7) How to Modify Text

You may want to modify text on your page to different formatting. This section will showcase how to make various changes to the platform.
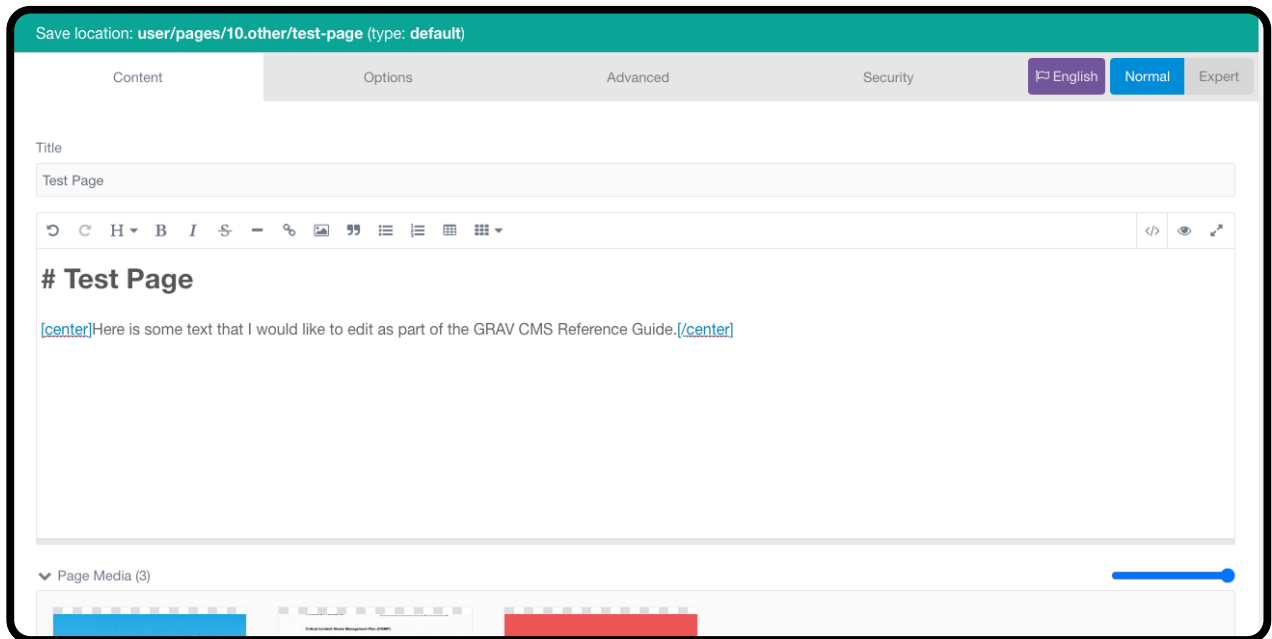
National View

A) Orientating Text (Left, Center, Right)

In order to orientate your text (or heading) to left, center, or right, you can wrap the text with the following.

- Left : [left] Text [/left]

- Center : [center] Text [/center]

- Right : [right] Text [/right]

B) Bold Text

In order to make your text bold you can either highlight the text and click the ⬚**B** in the editing menu OR you can wrap the text with **Text**.

C) Underline Text

In order to underline text you can either highlight the text and click the ⬚**U** in the editing menu under ⬚ or wrap the text with [ul] Text [/ul].

Go to the next page to see more…

D) Italics

In order to add italics to your text, you can highlight the designated text and click the I button or wrap the text with _Text_

E) Numbered List & Bullet Points

In order to add a list, please select the text and click the ▤ for numbered lists or ▤ for a bullet point. Alternatively adding below will work as well:

Numbered   Bullet

1. Text   * Text
2. Text   * Text
3. Text   * Text

F) Adding a Grid Table

In order to add a grid table to a page, you can quickly do so by clicking the grid table icon in the page editing menu as seen below. You can select the amount of rows and columns with your cursor. It will output the following for you to edit.
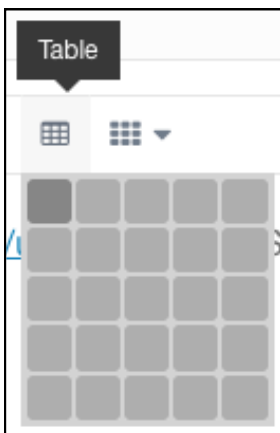
Output

Column 1 Title	Column 2 Title	Column 3 Title
Column 1 Item 1	Column 2 Item 1	Column 3 Item 1
Column 1 Item 2	Column 2 Item 2	Column 3 Item 2
Column 1 Item 3	Column 2 Item 3	Column 3 Item 3
Column 1 Item 4	Column 2 Item 4	Column 3 Item 4

G) How to Edit Forms

Editing forms in GRAV is controlled via the GRAV's Markdown format. For example here is a simple markdown contact form from GRAV's developer section. (**Link**)

(Next Page)

```
---
title: Contact Form

form:
  name: contact

  fields:
    name:
      label: Name
      placeholder: Enter your name
      autocomplete: on
      type: text
      validate:
        required: true

    email:
      label: Email
      placeholder: Enter your email address
      type: email
      validate:
        required: true

    message:
      label: Message
      placeholder: Enter your message
      type: textarea
      validate:
        required: true

    g-recaptcha-response:
      label: Captcha
      type: captcha
      recaptcha_not_validated: 'Captcha not valid!'

  buttons:
    submit:
      type: submit
      value: Submit
    reset:
      type: reset
      value: Reset

  process:
    captcha: true
    save:
      fileprefix: contact-
      dateformat: Ymd-His-u
      extension: txt
      body: "{% include 'forms/data.txt.twig' %}"
    email:
      subject: "[Site Contact Form] {{ form.value.name|e }}"
      body: "{% include 'forms/data.html.twig' %}"
    message: Thank you for getting in touch!
---
```

This is edited in the expert editor mode. MO's will not have access to the expert editor mode within the page editor. However, it's important to know that it exists. If you need to edit or create a form - please contact **casara@casara.ca** we can certainly insert it or modify an existing form.

G) Restricting Pages or Areas

In GRAV, you have the ability to restrict pages or areas of your site to certain members, groups, or positions.

For example, maybe you want to make sure your Members area only contains access to your MO's members (not other MO's). Maybe you want to restrict a page to only a certain zone, you can do that as well. You can even block certain groups from accessing the page.

Below we will show you how pages can be restricted for special use cases on your site!

Please Note: when setting restrictions on a page, all child (sub pages) to the parent are also included in that restriction. (i.e. Members Area --> by default all sub pages are included in the restriction, not just the one page unless specified in each sub page).

Example 1) - Restricting a Page to MO Board Members & Site Admin
access:
  admin: true
  site.nb-board: true

Example 2) - Restricting a Page to MO Member only
access:
  admin: true
  site.nb-members: true

Example 3) - Restricting a Page to Aircrew + Site Admin & Blocking RPAS + Ground Positions
access:
  admin: true
  site.nb-pilots: true
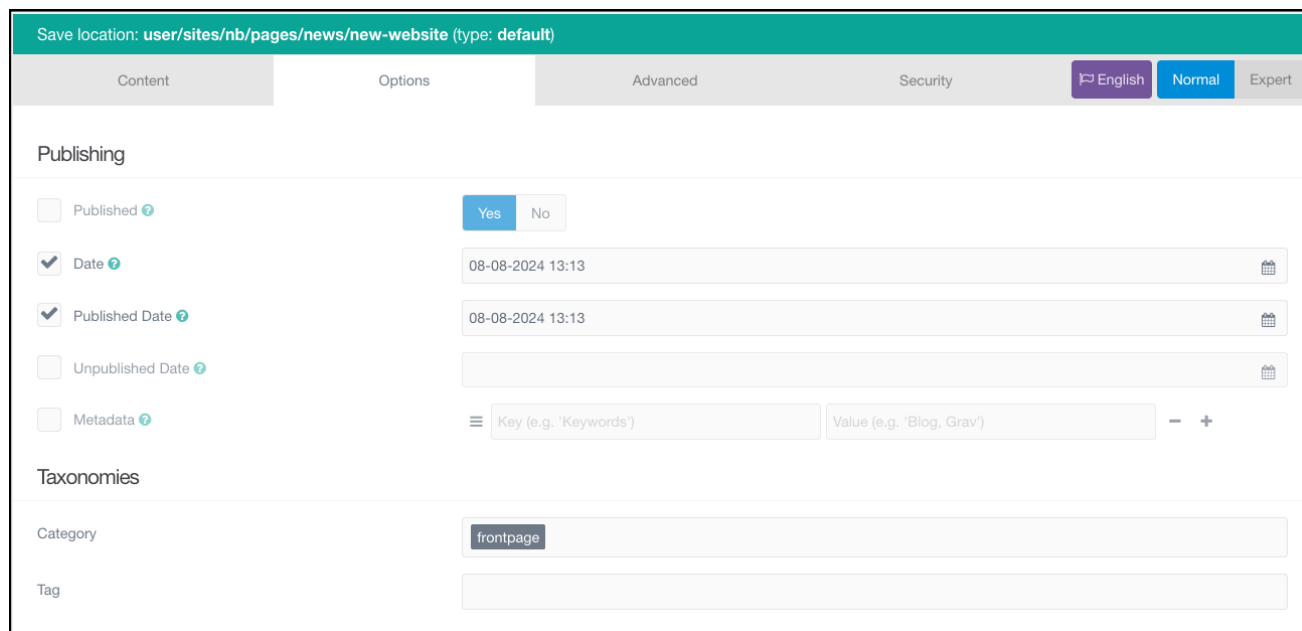 site.nb-navs: true
  site.nb-spotters: true

  site.nb-rpas-pilots: false
  site.nb-rpas-team-members: false
  site.nb-rpas-ia: false
  site.nb-support: false

This ability to set or change security permissions is only accessible to CASARA National. MO's will not have access to the expert editor mode within the page editor or security page. However, it's important to know that it exists to make necessary changes. If you need to edit or create security permissions for a page or area on your site – please contact **casara@casara.ca.**

H) How to Add An Article

In order to add a new article to your MO website, you can follow the steps below.

Steps:

1) Find the News section of your site and duplicate a page or add a new page and nest it within the News area. If you need help with this, visit: **Page 9**

2) Update your title and save it

3) Complete your article contents

4) Make sure to update the Date, Published Date, and set the category = frontpage (as seen above).

Now you will the newly added item to the front page of your site.

** **Please Note:** most MO sites by default have their front page setup with a News style article feed. If you would like that added - please contact CASARA National at **casara@casara.ca**

** **Feed Image:** In order to add one of your images to the News feed block for your new article, you can ask national to do so by contacting **casara@casara.ca.** This is because it needs to be added via markdown in the Expert Mode, that MO's do not have access to.

GANTRY 5

The Gantry 5 theme is the universal theme that we utilize for both the National/MO level websites. National has the ability to change these settings as they are linked together. If you would like theme level edits changed such as menu navigation, header logos (top of page), etc., please contact National at casara@casara.ca for further.
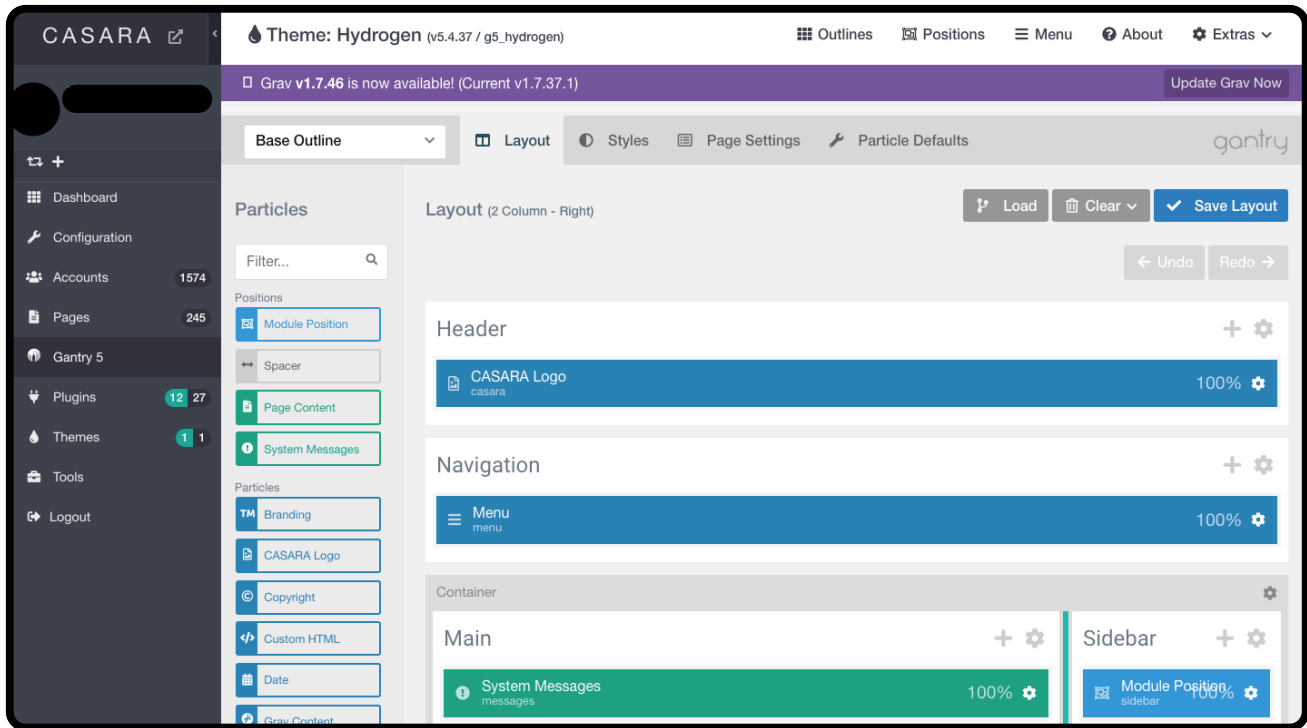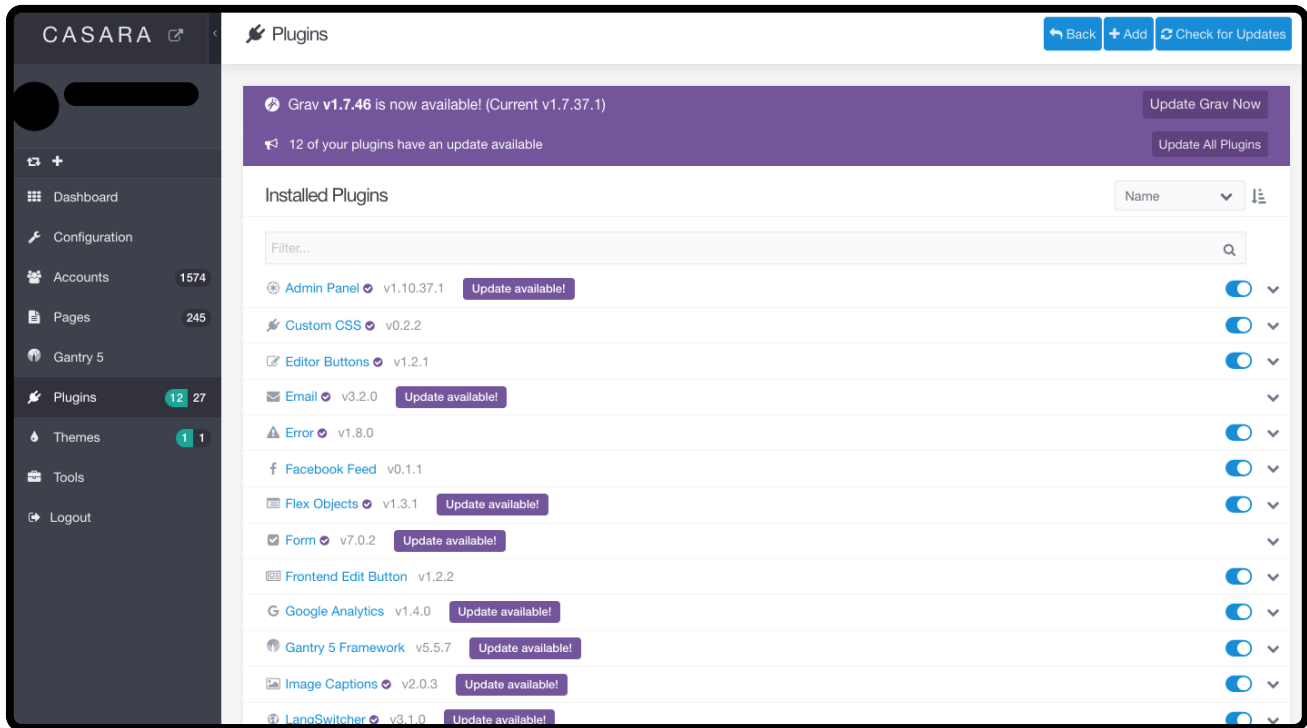

Please Note: since you have MO level access permissions, you will not be able to use this area of the site. However, it's important to know that it does exist and that you can make changes by contacting the national office.

WEBSITE FEATURES

Our Plugins is a universal area that we utilize for both the National/MO level websites. National has the ability to manage and update these settings as they are linked together. If you have any questions regarding this area, please contact CASARA National at casara@casara.ca

Please Note: since you have MO level access permissions, you will not be able to use this area of the site. However, it's important to know that it does exist and that you can inquire about it through contacting the national office.

ACCESSIBILITY & LIMITATIONS

When managing your website's security and permission settings, there are different levels of accessiblity and limitations to each position you hold. In this section we will walk through key concepts related to these topics that you should be aware of. If you have any questions regarding this area, please contact CASARA National at casara@casara.ca

1) Website Administration Permissions

TMMS plays a pivotal role in managing user permissions for website administration within our organization. In order for a member to become a website administrator and gain access to the admin area, the local Director for the Member Organization (MO) must assign the member(s) through TMMS.

2) National vs MO Level Access

The national and MO websites are interconnected via the GRAV CMS, ensuring smooth operation and consistency between the levels. Granting full access at the national level while restricting MO access to their respective pages is a security measure to prevent unauthorized modifications that could affect the website's overall functionality and user experience on the national and MO levels.

Quick Review

National Access:
- Users with national-level access have full editing rights to both the national and Member Organizations (MO) level websites.
- This comprehensive access is essential for maintaining consistency and ensuring that updates are seamlessly integrated across all levels.
- With this access, national-level users can manage all content, ensuring that all pages reflect the latest standards and information.

Member Organization (MO) Access:
- MO users have restricted access, limited to editing only the pages of their MO site (the content of the site).

SITE COMPARISONS

The Member Organization websites have customized information in reference to your specific MO details and location. However among the differences, there are also some similarities or linked pages/documents to the national site that this section will review.
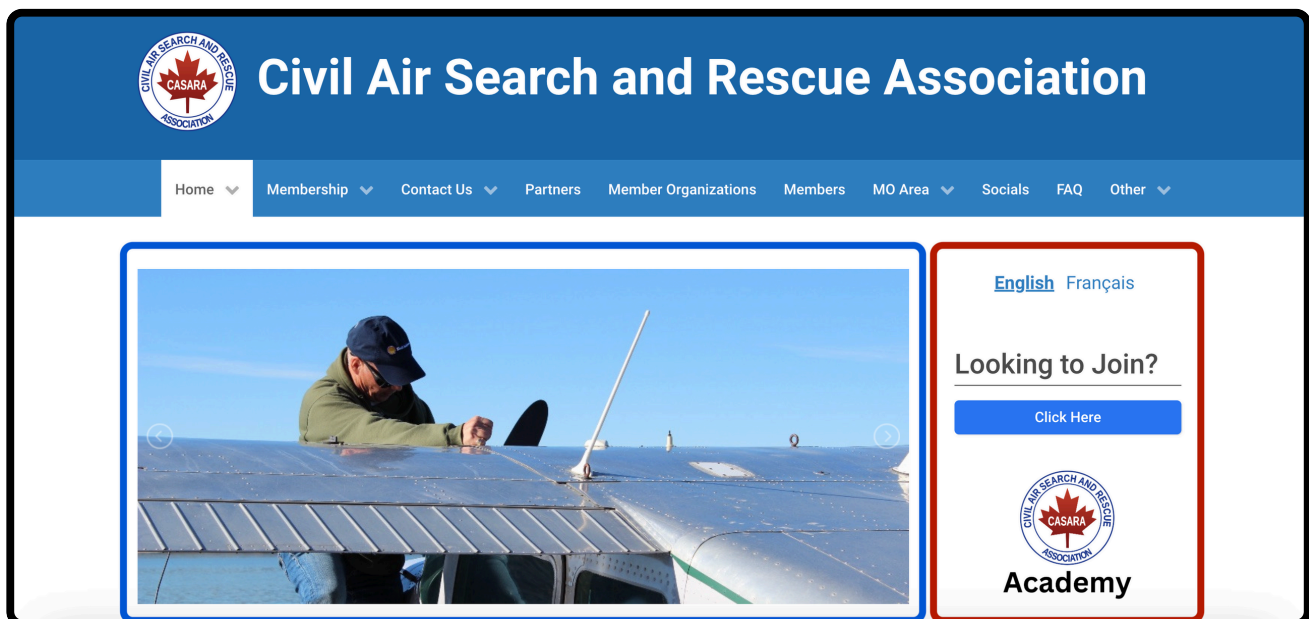
Similarities

The National and MO websites all have some core similarities based on their design and website construct. Your website may not have exactly what is mentioned below based on your MO's website build/editing, but this is for reference purposes.

1) **Website Theme:** The website shares the same Gantry 5 theme -- including colours, page format (header /w logo, menu navigation, and page), and site functionalities.

2) **Navigation Page Options:** Our typical website build structure includes the minimum:
- Home Option (display article feed / main page)
- Membership (web form)
- About (explain what your MO is about)
- Members Area (member protected area -- non public view)

3) **Aside Panel:** As per our design each page contains a aside panel (right part of screen). This means page content is split as the following - 75% page content (blue box), 25% aside panel (red box).

Differences

The National and Member Organization (MO) websites all have some core similarities based on their design and website construct. However, here are some core differences found between your MO and the national site. Your website may not have exactly what is mentioned below based on your MO's website build/editing, but this is for reference purposes.

1) Contents: The main differences is between the national and MO sites is the actual content of the site, which is localized to your MO on your website (vs. national). You can see the differences highlighted below on the home pages.

National
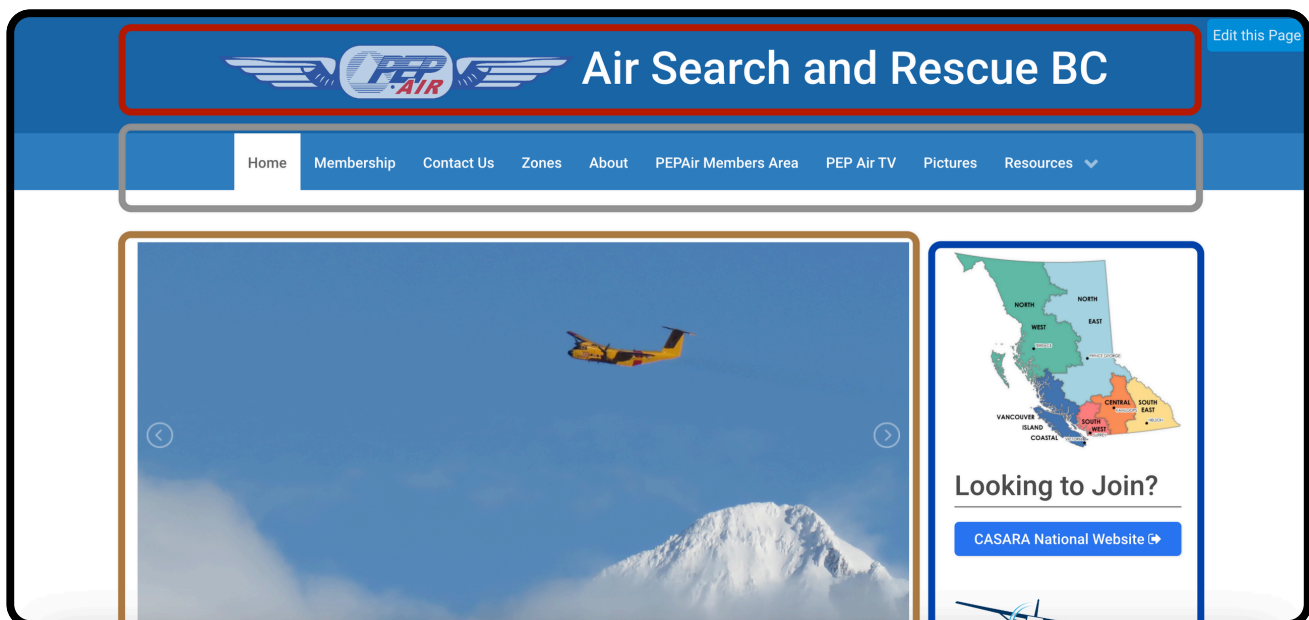
Member Organization

Some of these differences mentioned above include a different header logo, navigation menu & pages, different aside panel options (maps, membership form links, language switcher, news feed articles, etc.), and more.

2) Members Area Access: Even though both the national and MO level websites have members areas, the level of access may vary. For example, on the national website, all members have access to that non-public view set of pages. On MO websites there can different levels of access (i.e. MO specific members, zone specific level, etc).

Linked Pages

Among the pages between the national and MO level websites, there are linked or shared pages between the two. This allows for updated standardized national content to be shared on the MO level, with minimal upkeep by the MO. Your website may not have exactly what is mentioned below based on your MO's website build/editing, but this is for reference purposes.

Example: Membership Inquiry Form

On most MO websites there is the navigation option linking to the national Membership Inquiry Form or Roles & Qualifications page for membership sign up.
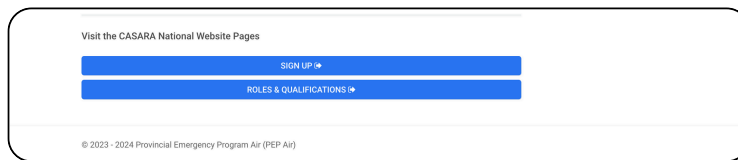
MO Level
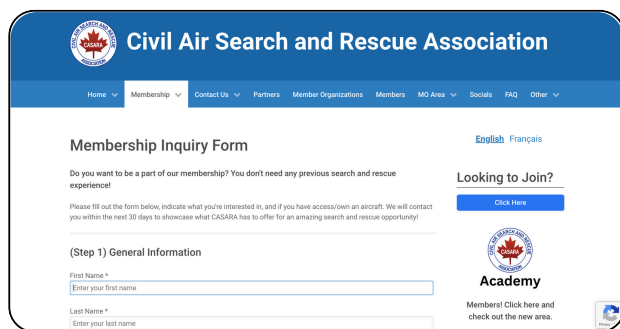
National Level
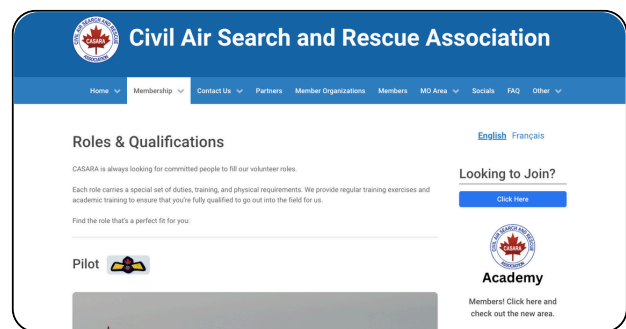
National Level

When clicked, it will take the user to the national website page to learn more about the certain information. In this case, more information about various roles & qualifications needed with the ability to submit an inquiry form to join a MO.

Linked Documents

Among the various documents your MO may list, sometimes it may include national level documents. The best way to link it is by using our Sharepoint document links. This way when a document is updated, it is also updated to the most current version on your MO site as well. This allows for updated standardized national content to be shared on the MO level, with minimal upkeep by the MO. Your website may not have exactly what is mentioned below based on your MO's website build/editing, but this is for reference purposes.
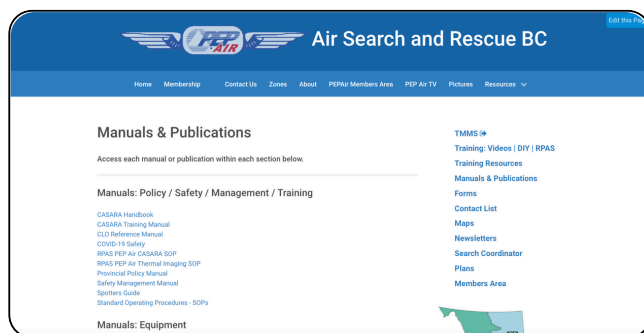
Example: National Policy Manual

In this case the MO website and National website both utilize the same document link, allowing for separate website pages to take advantage of the most current document in the Sharepoint location.

SharePoint Document Location

MO Website

National Website

GOOD TO KNOW

FREQUENTLY ASKED QUESTIONS (FAQ)

Q1: How do I gain access to the Admin Area for editing?

A1: In order to gain access, your Member Organization Director can set you with Website Access permissions via TMMS. Please contact them to request access.

Q2: How do I restrict a page to only a certain type of member (i.e. MO level, Zone level, BOD level, etc.)?

A2: This is set as a page security setting. Please visit the How To Series section of this reference guide to view how to set certain page restrictions accordingly. **(page 18)**

Q3: How do I setup a image slideshow?

A3: Unfortunately, MO's don't have access to the advanced tab within pages to set page types. Please contact CASARA National at **casara@casara.ca** to get a slideshow setup.

Q4: How do I upload/update documents on my site?

A4: This is covered in the How To series **(page 14)**

Q5: How do I setup my own form?

A5: Forms are created using the expert mode via GRAV's markdown format. If you need to have a custom form made, please contact CASARA National at **casara@casara.ca**. **(page 16)**

Q6: Is there a test environment/playground for our MO websites?

A6: There is no playground for MO websites, however there is a preview toggle (icon on the right) for site pages. This can be turned on while editing to view your page edits.

Q7: How do I change the side sections/menus on pages?

A7: These aside panels on pages are part of the navigation/theme settings setup by CASARA National. If you need to make changes or updates to them, please contact CASARA National at **casara@casara.ca** and we can certainly do so.

Q8: How do I post a new article for the front page?

A8: This can be found in our How To series **(page 19)**

Q9: How do I duplicate/add/delete a page?

A9: If you want to duplicate a page please visit here in the How To series **(page 10)**

Q10: How do I embed a video onto my web page?

A10: This is covered in our How To series **(page 12)**

REFERENCE/USEFUL LINKS

1) **Full GRAV Documentation**.. **Open**

2) **CASARA National Website**.. **Open**

3) **Member Organization Websites**.. **Open**

4) **GRAV CMS Forum**... **Open**

5) **GRAV CMS Demo Site**.. **Open**