

# ★ Quick Start Guide for Client Editors

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Your site admin URL = [https://\[public site name\]/admin](https://[public site name]/admin)

## Logging in:

Note: A site administrator must first give you editor permissions.

1. First time login:
  - a. If the option is available, login with your Penn State Account.
  - b. If you cannot login with your Penn State Account, request a new password, using the “forgot password” link and enter your Penn State email address.
2. Subsequent logins: If you needed to create a new account and password in Step 1, use those credentials to login.

## Editing existing content:

1. Navigate to “Entries”
2. Navigate to Pages (under the “Structures” heading) to see the pages you can edit and look below the “Channels” heading to see channel entries you can edit.

## Updating Directory

Navigate to “Entries”

Navigate to “Directory” in the “Channels” heading.

### Edit Existing:

Select the entry (person) you wish to edit, then make any necessary changes to their record and Save.

### Remove/Hide Existing:

You can also remove someone from the directory without actually deleting them (recommended!) by either toggling the “Enabled” switch and/or by removing their assigned categories to control where and whether they are displayed on the site. Click Save.

### Add new

Click the red “New Entry” button.

Complete the person’s information as needed. At a minimum, you must supply their first and last name. When you are finished editing, click Save.

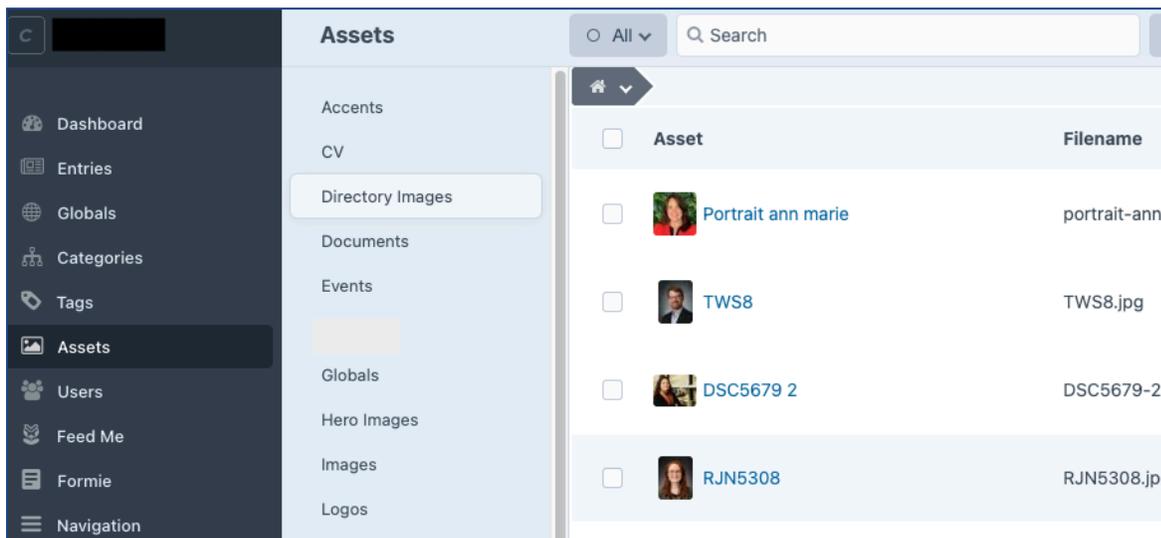
After editing, hiding, or adding directory entries, you can refresh the directory pages on your site to confirm that people are appearing where you think they should be appearing.

## Updating photos

### Swapping Photos

First, find the photo you want to replace.

Photos are considered “Assets.” Navigate to “Assets” and select the type of asset you want to replace. (Images or Directory Images would be the most common). Search for the image you want to replace. Click the blue link to see more details about the image.



One option on this screen is to Replace File. You can click this button to pick a new image from your computer. Update the alt text, caption, and credit fields, to reflect the new image, if needed. Save. Once you save, the image and its connected information will change *everywhere* it appears across the site.

**Hamer 2308 designactivismstudio** View Download Replace file Save

**Title** \*

**Image Alt Tag** \*  
 Required for accessibility.

**Not Required**

**Image Caption**  
  
 <> B / ↻

**Image Credit**

**Image Credit URL**



Filename: hamer\_2308\_designactivismst  
 Location: Images  
 File size: 222 KB  
 Uploaded by: Steve Nelson  
 Dimensions: 683x522  
 Created at: 8/14/2023, 4:20 PM  
 Updated at: 8/14/2023, 4:21 PM

## Adding Photos

Images can be uploaded from your computer to Assets or can be uploaded from within image-based blocks and fields in Entries.

**Assets** All  Date Uploaded Upload files

Asset	Filename	File Size	File Modified Date
<input type="checkbox"/>  <a href="#">Portrait ann marie stanley</a>	portrait-ann-marie-stanley.jpg	237 KB	8/11/2023
<input type="checkbox"/>  <a href="#">TWS8</a>	TWS8.jpg	11 KB	7/24/2023

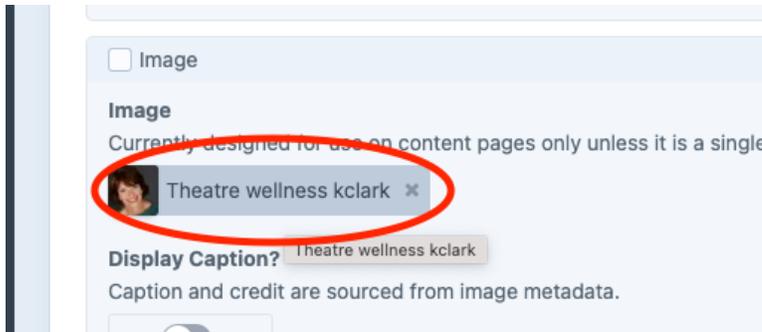
Every image must have a title and alt text. [Visit Accessibility at Penn State for image alt text best practices](#). The title does not need to be the same as the filename. Image captions, image credits, and a URL for the credit (such as copyright details or original source) may be added.

! Note: alt text should succinctly describe the visual content to someone with visual impairments.

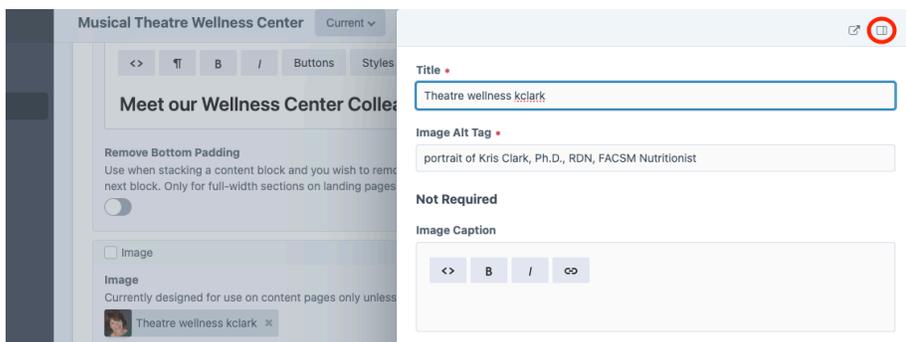
## Editing photos

You can make basic changes to existing images. While you have to be in Assets to replace an image, you can Edit an image and its text content directly from a page entry.

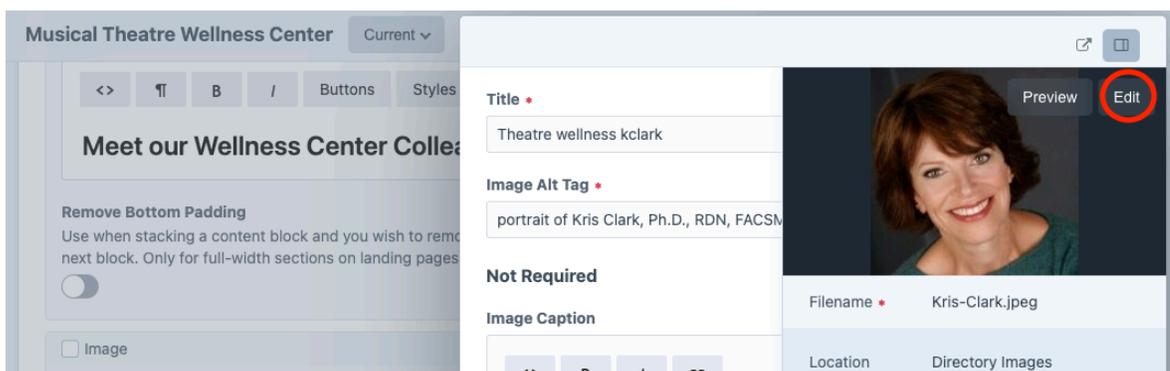
To edit directly from a page entry, locate the image on a page entry and double click the image to open a side panel.



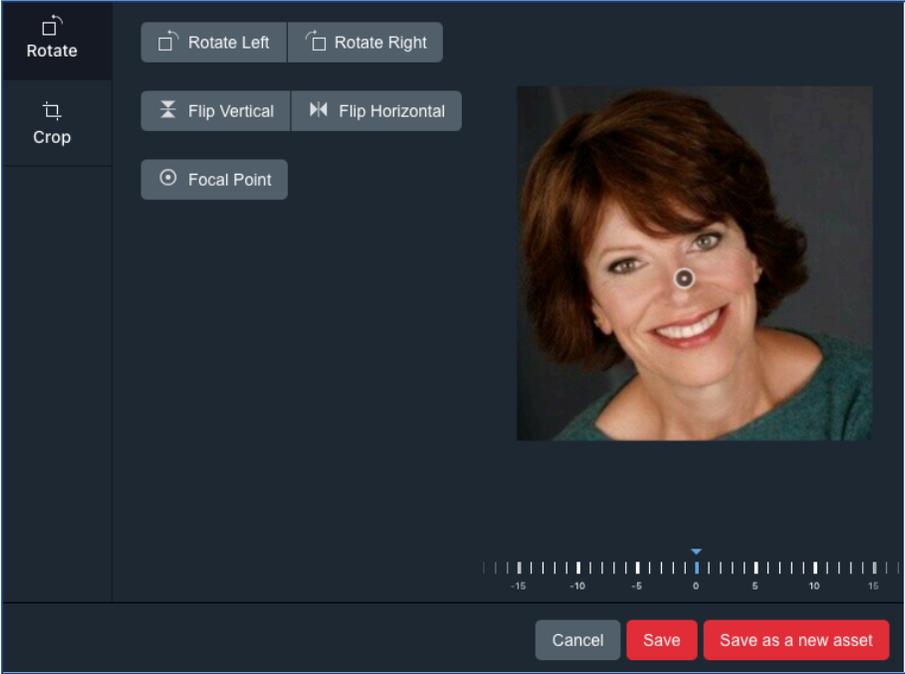
Then, click the small icon to the top right to open another panel.



Hover over the thumbnail of the image pane and click Edit.



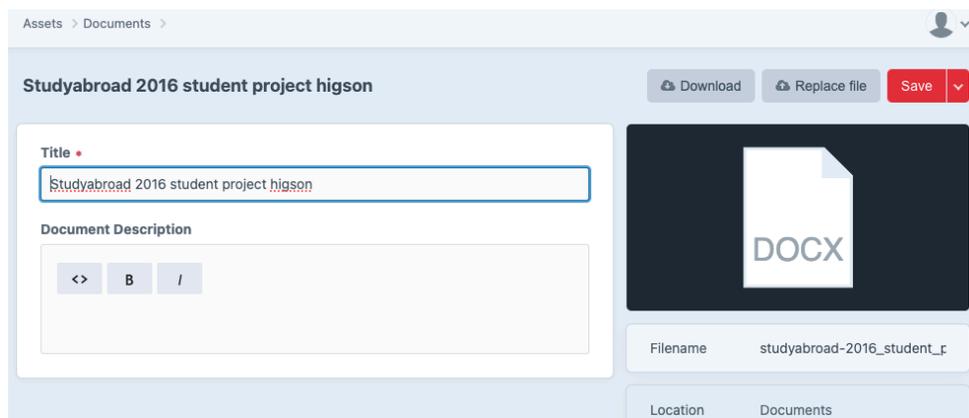
Here, you can crop, rotate, flip, and adjust the focal point to control what part of the image the website prioritizes. You can Save or Save a Copy. Then, Save once again from the first image panel.



## Updating Documents

### Swapping Documents

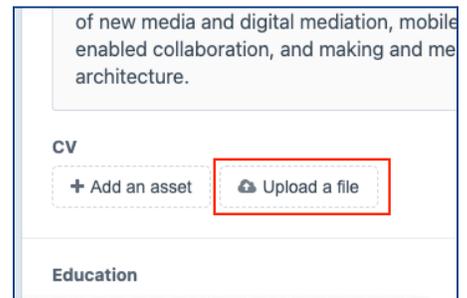
This process is very similar to the process of [swapping photos](#). The difference is just that you will navigate to a volume in Assets that contains documents. This may be “Documents” or “CV” or another document-based asset volume on your site. Once you find the document you want to swap, you can click “Replace file,” select the updated file from your computer, and save. It is okay if the new document does not have the same file name. You can change the title (perhaps to reflect a new version or date).



### Adding Documents:

You can add documents directly to document fields on pages or entries. For instance, you can upload a CV right into someone’s directory entry.

Documents do not require alt text, but documents on your website should meet accessibility requirements. (See Penn State Accessibility for details: [PDFs](#), [Word documents](#), [slides](#), and [spreadsheets](#).)



Click the “Upload a file” button to upload a brand new document from your computer. You can click on the document once it is in place and alter the title from the page or entry.

