Instruction Manual

Web Administrator Training, Version 3

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Sandbox

Your new website is created using a content management system (CMS) called Drupal. A template has been developed incorporating a contusive global design in a structure called the Sandbox. The Sandbox contains:

- Navigation Structure that is the foundation of the website
- Landing page and post templates that organize all your content
- Administrator tools to create, edit and regulate content and users

Layout

The website is organized into three layers of magnification.

1) Home page

The home page is the launch pad for visitors. It displays a variety of timely and static content depending on your school's needs. Most of the content will be linked to other areas of the website.

2) Landing page

Each navigation term is organized in a landing page format. On a landing page, multiple pieces of content called posts are displayed.

The landing page format consists of a:

- **Navigation panel** along the left side showing the terms under the current term
- **Middle content zone** where most of the content is organized.
  - Top post is called the Overview and introduces the content the foundation of the website

Right sidebar shows secondary content including contact information, related posts or staff profiles.

Navigation

The structure of the website is built using navigation terms. Navigation terms are a hierarchy of fields that organize all the content on the website. Because this

Log in to the Sandbox

1. Log into the sandbox or website by hovering in the bottom left corner of your internet browser window.
2. A small grey gear icon will appear as you hover over the area. Click the icon.
3. Then click the Log in menu prompt.
4. Enter your email and password provided.

Administrator Tools

Now that we are logged into the system we can see a bottom toolbar of tools.

Commands Menu

Once you're logged in you'll see a gray Commands button in the lower left corner of your screen. Click it for the menu to expand. It gives you shortcuts to various things you can do within the site.

a. **My account**

channel), you'll see [+] buttons for each type of post you can add. Selecting one of them will bring you to the editing screen.

Template Choice

Right next to the Content Zones button, this menu allows administrators to change the formatting of a landing page.

Preview View

This menu button of the bottom right, allows administrators to preview page with a different access role.

Website Structure

As mentioned above, the website is organized by a hierarchy of fields called navigation terms. As a web administrator, you have the ability to rearrange the terms, edit them and create new ones.

How to change and add navigation terms

Go to Manage Nav Terms on the Commands menu.

To reorder the terms, grab the handle to the left of a term and drag it to its new location. Make sure to save the order (button at the bottom of the page) when you're done or your changes will be lost.

To rename terms, click the Edit link to the right of the term, under the Operations column. Make the desired changes and click save.

To add new sub-terms:

- Click the Add term tab at the top of the Manage Nav Terms area
- Give the term a name (keep in mind that this will display in the site navigation, including any drop down and sidebar menus)

Note: When creating new terms, be sure to choose a parent for the term! If you don't choose a parent it will default to "root," which will make it appear at the top level in your navigation bar, as mentioned above.

Posts

All content on the website is created in a post. Each post type is formatted for a specific type of content.

Post types included in your school template are:

- **Overview** – formatted to always appear at the top of a landing page
- **Post** – formatted for general content
- **Announcement** – formatted for school and event announcements
- **Blog** – formatted to allow for comments
- **Carousel** – formatted to display on the home page in the image carousel
- **Article** – formatted for an article or news item
- **Email blast** – formatted to bundle content and send it out as an email
    - **Email Blast newsletter** – specifically set up for a newsletter format
- **Event** – formatted for a school or community event.
- **Document** – formatted for post with a file attachment
- **General Information** – formatted for a general information piece or bulletin
- **Photo Gallery** – formatted for multiple photos displayed in a gallery
- **Press Release** – formatted for a standard press release
- **Profile** – formatted for a staff profile page.
    - **Administrator Profile**
    - **Teacher Profile**
    - **Staff Profile**
- **Teacher Information** – formatted specifically for teacher pages
    - **FAQ**
    - **Homework**
    - **Resources**
    - **Supply list & requests**
    - **Teacher's Announcement**
- **Pod** – a shortcut to other content

Create and Edit Posts

In this manual, the five main type of posts will be examined. For more information on other post types, refer to the Help Menu on your website.

Create a Post

1. Hover over the commands bar in the lower left corner of the screen and click [+] Create post.
2. Under Post options: choose post.
3. **Title*:** Type in a title. You are limited to 128 characters.

   Tip: it's good to keep the title as succinct as possible since you also have a subtitle field to use. A shorter title is easier for users to read when scanning pages.

4. **Subtitle:** Type in a subtitle.
5. **Custom author/date info:** This field appears in small type underneath the headline.
6. **Body text area*:** This area is where you content is typed or copied into. It features a Word-like editor to help you format your content. Note that if you paste text (copied from Word, etc), the formatting will be removed so that your content starts out clean. A toolbar above the text area gives you many standard formatting options including bold, italic and spell check. Check out the Formatting section of the manual for more information on all the features.
7. **Nav Term Choice*:** Pick the nav term(s) that you want this post to appear on. If you don't pick one, the post will only be accessible by its URL.
8. **Secondary Elements:**
   a. Images: Upload an image file from your computer or select a remote URL and transfer. You can upload as many images as you like, but only the first one will be highlighted on the post.
   b. Related links: If your post references another site or document at an external URL, please enter it in this field. Please include a title for each link.
   c.

6. Under Contact Information, use the Contact field to relate the post to a particular staff member profile. Just start typing the staff member's name in the field and select.
7. Save the post, review it in draft format and then edit it to publish.

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Show Blocks: This is handy when you're formatting content in the editor as it shows where paragraphs break - this is on by default, so turn it off if the formatting is getting annoying. It doesn't affect the actual formatting of your content.

Remove Format Button: Highlight any text that you want to remove formatting from.

Format Drop Down Box: Use the drop-down Format box to style your content (the box that says "Normal" in it, by default). All body text should use the "Normal" style, with the exception of section headlines, which should use “Heading 3” for major headings and "Heading 4" for subheads. To follow convention, you should use H3s first, then H4s, then H5s if necessary. The Address format can be used for footnotes. Note that there are Switches under Display Options (more on this, later) that will allow you to display all text tagged as H3s as Tabs at the top of your page, or to create Table of Contents from all H3s. This breaks your content up into smaller chunks or adds links at the top. If you want to take advantage of these display options, be sure to make your main headings within the body H3s while formatting.

Spell Check / Spell Check as you Type: Use this feature to spell check the text. Note most browsers have a built in spell checking feature which is much faster than this tool.

Teaser Break: The Teaser button will insert a break wherever your cursor sits. This is great for controlling how much of your post shows up on a landing page, while allowing the entire post to be viewed when the visitor clicks the title or read more.

Tip: If you do not want read more to appear on the bottom of post on a landing page, make sure there isn’t a paragraph return or any spaces after the teaser break.

Relating Posts & Bundling

Two important features of the Sandbox are the ability of relate and bundle posts. These features add more connectivity between your content and also makes it easier for the end user to find the information they need.

Related people & profiles

This feature related one post to another. It is often used when referencing the author of a post or someone who could be contacted for more information. Related posts is also used for staff who want to their own content connected to their profile like a teacher's page.

Create a Teacher Information Page with Related Content

Optional teacher pages are available for those who want to post class announcements, homework and other

Create an email newsletter

To create an email newsletter, follow the “Create a Post” steps above with the following differences.

1. Hover over the commands bar in the lower left corner of the screen and click [+] Create post.
2. Under Post options: choose email newsletter.
3. Enter a short introduction in the text area
4. Fill out all the relevant fields including related links, images and file attachments.
5. Under newsletter content, search for the posts you would like to add to this newsletter.
6. Save the post, review it in draft format and then edit it to publish.

Emailing the newsletter

In order to email out from the sandbox, you will need a Mail Chimp Account. Please contact Andrea Landis for more information.

Forms

Forms are used to collect data from site users. Examples include a donation form, a contact us form, and a submit a request form.

3. Check the box for **Mandatory** if you want the user to be required to fill in this field.
4. Check or uncheck the box for **E-mail** if you want the results of this field sent via e-mail to the recipient of the form.
5. Click the Add button.
6. The next page will give you options for the field you've created, including a description that you can present to your users to help them fill out the field properly. Everything on this page is optional, and will change depending upon the type of field you are creating:
    a. **textfield:** Basic textfield type. You'll have options like Label, Description (text that can help your users fill out that field), etc.
    b. **grid:** Allows creation of grid questions, denoted by radio buttons. Options go across the top (for example, Poor, Good Great), and Questions appear on the side (How are we doing?) The display allows the user to fill in bubbles as responses to each question.
    c. **e-mail:** A textfield that automatically fills in a logged-in user's e-mail, or allows anonymous users to add their e-mail manually.
    d. **file:** Allow users to submit files of the configured types. On the configuration screen you are able to determine the types of files that can be uploaded.
    e. **textarea:** A large text area that allows for multiple lines of input. Options include the ability to change the amount of text you'll accept, change the size of the text box, etc.
    f. **date:** Presents month, day, and year fields. Options include format, time zone and available years.
    g. **hidden:** A field which is not visible to the user, but is recorded with the submission. This field requires that you insert tokens (pieces of code that will pull various information from the visitor) and is for advanced users only.
    h. **time:** Presents the user with hour and minute fields. Optional am/pm fields.
    i. **markup:** Displays text as HTML in the form; does not render a field. For advanced users only.
    j. **pagebreak:** Break up a multi-page form.
    k. **select:** Allows creation of checkboxes, radio buttons, or select menus. Options are created on the second page, where you are able to add the items that you want to appear in your select list.

l. **fieldset:** Fieldsets allow you to organize multiple fields into groups.

Configuring the email recipient of a webform

Once you're done adding the fields you want, click the **Emails** button at the top of the form. Here you can add (one or more) email addresses for whomever should receive the webform submissions.

Note: the webform submissions will always be available on the site, but it's a good thing to have someone notified when they are submitted, too.

Webform Form Settings

1. **Confirmation message:** You can optionally enter text that the user will see when they complete the form, or -
2. **Redirect URL:** instead of a confirmation, you might send them to a page within your site.
3. **Submission limit:** optionally restrict the number of times someone can submit the form.
4. **Submission access:** optionally restrict what roles can see the form.
5. **Advanced settings:** click the text to expand this link, and choose from the options provided. Note that "show complete form in teaser" will often be a desired choice, so that the user doesn't have to click through from the teaser to another page to fill out the form.

How to view/download results from a web-based form

1. Browse to the webform post and select the *Results* tab. You will see all the most recent submissions displayed under the “submission” sub-tab. You will see date/time, user, IP Address, and two links to *View* and *Delete*.
2. The system has a built-in analysis function. Select *Analysis* under *Results* to view statistics about the submissions of the form.
3. Click the *Table* button to view the results in a table.
4. You can download all the results to Microsoft Excel or other spreadsheet program by clicking the *Download* button and clicking “Save” when prompted. The file will download onto your computer as a CSV file which can opened, edited, and studied.
5. The *Clear* button will clear all of the webform submissions; not suggested unless you're clearing test submissions before your site goes live.

Administrator Functions

Managing Users

1. Click the Command and then the Manage Users button.
2. If you want to block the user, or add/remove a role from their account: check the box next to their name, use the drop down menu above the user list to choose the operation you'd like to perform, then click the Update button. Operations include blocking/unblocking the user, deleting the user, adding or removing roles. Important note: don't delete users who have contributed content, as their content will then be attributed to the "anonymous" account, which will cause problems. Instead, block them, change their password, or simply rename them.
3. To edit a member's user name or password, click the Edit link for that user, make the desired changes and scroll down to save.

Levels of access

Each user has one (1) and only one of the following standard levels of access assigned to them:

Registered user: Basic user, assigned by default. No member permissions given. A registered user can log in to the site, reset their password, subscribe to updates, but cannot see member-only information.

Member: An approved/authenticated user based on certain criteria. Members are assigned member status by a site administrator, or by a certain set of rules (like if their e-mail address ends in a certain domain, if their e-mail was on a pre-approved list, etc.) Members may submit certain kinds of content for consideration, or may propose edits for any post type they are allowed to edit.

Sometimes the member role is only allowed to edit posts they created or were set as author of, depending on the site's security settings. This is helpful for things like something like a "member profile" post type, where they should be able to edit their own profile but not anyone else's.

Contributor: Staff and/or content contributors. Contributors can propose edits for any post on the site, but nothing can go live without being OK'd by the site administrator. They can't make changes to the navigation of the site like administrators. Contributors can see new posts they created that are unpublished, but other editors cannot. Once their post is approved, other users with the proper permissions be able to see it.

Editor: Staff and/or content editors. Editors can make edits for any post on the site and add new content. Every time an editor makes a change or adds new content, the site administrator is notified. They can't make changes to the navigation of the site like administrators.

Site Admin: Staff who manage the website. Site Admin's can add/remove users, approve and publish pending content, add/edit site navigation, manage post types.

System Admin: Primary point of contact / IT Administrator. It is a special protected administrator role. Not normally used, except for larger sites with lots of administrators. Cannot be edited or deleted by any other user except another system administrator. Sees system logs and can initiate a security lockdown.

Managing Content

There are a couple of different ways you can access your content to manage it, especially if you want to edit only one post.

You can navigate to the post you want to edit, and click the Edit button in the Admin Hover bar that appears when you hover over the text. Or you can click the "edit" tab at the top of the post.

To delete a post, you can edit it, then scroll down and click the Delete button. *Please note that this cannot be undone!*

Managing content in bulk

If you want to edit many posts – say, for example, you want to find all of your posts tagged to "About Us" and add the Navigation term "Contact" to them – then Bulk Operations is the way to go.

1. Click the Manage content button in the Commands menu.
2. Adjust the Filter terms for the content you're looking for, then click Apply.
3. All of the posts tagged to the section you're looking for will appear below. Click the box at the top of the list on the left (this is the "select all" box). If there are more rows than you can see on the page, a message will appear asking if you'd like to "Select all rows." You would.

4. Click the light gray *Show Advanced Options* text link above your search results list.
5. Your advanced options will appear as buttons. Click the button for *Modify Node Taxonomy Terms.*
6. On the next page, choose the *Add the selected terms* radio button, then scroll down and select the proper term that you want to add.
7. Scroll to the bottom of the page and click Next, then confirm on the next page.

Bulk operations can be used for many things in addition to adding/removing Navigation or Administrative Terms. You can change the author of a post (for example, you might want to change all posts authored by admin to another author); another handy use is to publish