Instruction Manual

Web Administrator Training, Version 3

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Table of Contents

SCUSD.EDU

Our website is created using a content management system (CMS) called Drupal. A website template has been developed incorporating a contusive global design in a structure. It 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.
  - o Top post is called the Overview and introduces the content displayed on the page.
  - o A variety of other posts are organized under the overview
- **Right sidebar** featuring highlighted and linked content called pods.

3) Post view

Each individual piece of content is called a post. When you click on a post, it is expanded to show the full post view. This is slightly different than the landing page format.

- **Navigation panel** along the right hand panel now shows the post location in the navigation structure. Also shows how to share this post online.
- **Middle content zone** shows the expanded view of the post content

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 website is content based, you can link content to more than one term.

The top level of nav terms are called root terms. They make the navigation bar that runs across the top of your website page under the banner. Secondary and tertiary terms are shown when you hover over the each root term.

As a web administrator, you have the ability to rearrange the terms, edit them

Log in to the Website

1. Log into the 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**: The link to your website account page, where you can edit your user name, change your password, etc.
b. **Create post**: Allows you to create new content.
c. **Manage content**: Takes you to the content management system where you can make batch operations and filter content of you and other users.
d. **Manage navigation**: Takes you to the navigation term tree, where you can edit, add or reorder nav terms.
e. **Manage post types**: Takes you to the post type term tree, where you can edit, add or reorder post types.
f. **Manage users**: Takes you to a page where you can activate memberships, assign roles, edit users, etc.
g. **Log out**: This button logs you out of the site altogether.

Content Zones Button

This button allows administrators to create and edit content directly from a landing page. When the button is selected, you have some additional editing features.

To use the Content Zones, go to the section of the site you want to post content to and click the Content Zones button (light grey, lower right of screen). The areas where you can add content will glow green a bit - typically you'll see this in the main area and the right sidebar area. If you hover over the very top of the main area you'll see [+] Overview, which will allow you to add an Overview at the top of the page. If you hover just below that (or over the first post in the main 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 navigation 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 on SCUSD are listed below (microsite list may very). The most popular post types are highlighted.

- **Overview** – formatted to always appear at the top of a landing page
- **Quicklink** – used by System Admin to add global links to the website
- **Post** – formatted for general content
    - **Article** – used for press pieces and other articles
    - **Bid Announcement** – used by Contracts & Purchasing
    - **Blog entry** – used when you want the ability for users to leave comments.
    - **Board Update** – to post Board updates
    - **Bulletin** –used by Administrative Services
    - **Course** – used to add a course description to the site
    - **District Staff** – formatted for staff profile that included their contact information
        - **Board Member** – specific for board members
        - **District Office** – specific for our district offices
        - **Department Quick Link** – posts for the A-Z Directory
    - **District Program** – for program information used by Communications.
        - **School Program** – specific information on school program
        - **District Service** –information on district services used by Communications
    - **Document** – formatted for post with a file attachment
        - **Audit Report** – specific for audit reports
        - **Board Document** – for agendas and minutes
        - **Board Policy** – specific for board policy posts
            - **Administrative Regulations**
            - **Exhibit**
        - **Common Core Document** – specifically for Common Core documents
        - **ISO Form** – formatted for ISO Forms
        - **Email blast** – formatted to bundle content and send it out as an email

e-Connections Newsletter – specifically set up for a e-Connections newsletter format

Newsletter section – to be used in the e-Connections post

- **Event** – formatted for a school or community event.
    - **Board of Education Meeting**
- **Form** – to be used for webforms
- **Letter** – formatted for posting a letter
- **General Information** – formatted for a general information post
- **Photo Gallery** – formatted for multiple photos displayed in a gallery
- **Press Release** – formatted for a standard press release
    - E-Connection Post
    - **Press** Advisory – for press advisories. Used by Communications.
- **Principal Bulletin** – to be used to post on the Principals' Bulletin page. It is automatically added to the page.
- **Public Notice** – for public notices
- **Request for Proposal** – to be used by Contracts and Purchasing for RFPs
- **Salary Schedule – to be used by HR**
- **Scholarship** – to be used to post scholarship information
- **School** – formatted for information on each SCUSD school
- **Video** – formatted for video

Pod – a shortcut to other content. Appears as a square post in the sidebar or on the home page.

- **Grey Pod** – specific type of pod for the home page.

Create and Edit Posts

In this manual, the four 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. File attachments: Upload files from your computer or a remote URL into the file attachments field. Add a description for each file attachment.

       Tip: Use a short action description like ”Download document.”

9. Save the post. Click the save button at the very bottom of the screen to save the post as a draft.
10. Review the post. You will now be able to see the post formatted. This gives up the option to look it over and proofread it before it's published.
11. Edit the post. Hover over the top right hand corner of the post and click the notepad icon that appears. Select "edit this post" and you will return to the editing window.
12. Scroll down to Publishing Options and

4. In the Body text area, enter the staff member's biography (optional).
5. For the Nav Term, select the appropriate staff roster page
6. Add any relevant images, related links, file attachments or video on the tabs below the text area.
7. Under the Contact Information tab, enter the staff member's email, phone number and address.
8. Save the post, review it in draft format and then edit it to publish.

Create an Event post

Use the Event post type for upcoming school and community events that you want listed on the school calendar.

1. Hover over the commands bar in the lower left corner of the screen and click [+] Create post.
2. Under Post options: choose pod.
3. Only the title, description and image will appear on the actual pod.
4. Destination redirect: Use this field to redirect the user to another page when they click on the Pod. Using the Destination redirect field is normal behavior for pods, which, when clicked, immediately jump the user to another page.

   Note: Use caution when using this field for post types which would link externally. (It isn't very nice to suddenly redirect the user to another site. In that case, consider using the field instead.)

5. Save the post, review it in draft format and then edit it to publish.

Formatting Posts

Descriptions of the formatting toolbar from left to right.

Bold and Italics Buttons: Highlight the content you want bold, italic or aligned and click the appropriate button.

Bullet and Numbered Lists: You can use bullets or numbers to help format lists of information.

To create a bulleted list: highlight the items you want in your list and click the Bulleted Lists button. To create numbered lists, type your content, highlight everything you want to be included in your numbered list, and click the Numbered List button. If you then want certain subitems in that list to be lettered (second level), highlight just the subitem(s) and click the Indent button to push them in another level.

Indent Buttons: Highlight the content you indented and click either the decrease or increase indent button.

Undo/Redo Buttons: Use the buttons if you need to undo or redo an action.

Insert Link Button: You can insert a: 1) link to another website or to a page within your site, 2) to an email address or 3) to an anchor in the text (more on this in a bit) using this tool. To insert a link, highlight the text in the body you wish to turn into a link and select the button that looks like a globe with a chain link in front of it. A popup will appear asking for the parameters of the link. You can link to a variety of content, but the most commonly used will be URLs and e-mails. Select the link type from the drop-down, type in the address and click ok to set the link. Note: if you want to link to a post within your site, simply paste or type in a link

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 a ppear 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 website are the ability of relate and bundle posts. These features add more connectivity between your content and also makes it

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 .

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

Web Administrator Support

Please check the Web Administrators Training (http://www.scusd.edu/web-administrator-training) page for the most up-to-date manuals and support documents.

For more information, contact Andrea Landis at (916) 643-7421 or at andrea-landis@scusd.edu.