Drupal – Site Admin Training

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Creating user accounts

1. Click Admin Bar People then Add User
2. Enter a unique username
3. Enter a unique email address
4. If you leave the password field blank a random password will be created. We recommend using this option unless the person will be editing the website.
5. If you checked the “Notify User of New Account” the system will send an email to the person with login information.

User List – CSV File

1. Click Admin Bar People then Select Downloadable User List
2. Click the “CSV “ at the bottom of the page
3. CSV file will be created and down loaded

Assign Permissions and Roles

1. Go to the department you want to assign permissions for
2. Click the “Group“ tab then click “Add people”
3. Enter the Username (e.g. bsmith)
4. Place a check in the appropriate checkbox
5. Click “Add users” button at the bottom

Creating Person Profile (See Detailed Instructions)

1. Make sure that a profile doesn’t already exist for that person
2. Go to the department you want to add them to and click the Create Person link in the left column
3. Add the basic profile information (First and Last name, phone, etc.)
4. Then click on the Department or Board Membership tab, find the Department or Board you want to add this person to, and make sure the Membership Status is set to Active.

Finding Missing/Unpublished Departments/Content

1. Go to the Admin Bar click on Content menu option
2. Use “Show only items where” to filter on Unpublished content
3. Click on Updated column to change sort order

Creating Department, Board or Committee

1. Go to the Admin Bar > Content > Add content >Department/Board Home Page
2. Add the Department or Board name to Title box
3. Click General Information tab and check Department or Board checkbox
    - If Board then enter Name of Board into “Title when listed as a Board”

4. Click on Navigation Settings tab, place a check in the “Provide a menu link” checkbox
5. Enter name that you want to appear in the navigation in the “Menu link title: “ field,
6. Open the “Select parent item for link title” drop down box and select the location for this link to be placed under. For example, Department, Boards & Commitees, or Government.
7. Click Save and Close.

Note: remaining information can be updated by going to the page and clicking on the EDIT tab.

Adding Key Contacts – Department Page

1. Go to the desired Department or Board Page
2. Edit the department you want to add the key contact to.
3. Click on the Key Contact, Staff Member, Board Member tab
4. Type in the name of the key contact you want to add. (Create

Department Page Revision Publishing

1. Go to the desired Department or Board Page
2. Click the Revision tab
3. Click the Revert link for the version of the page that you want to be live on the website
4. You also have the option of selecting 2 different versions and clicking the Compare button to see the differences between version of the webpage.

Site Background Image

1. Go to the website homepage and click Edit
2. Click the Site Display tab
3. Locate Site Background Section
4. Click Choose File , then Click Save and Close (do not use Upload button)

Calendar Color Coding

1. Go to the Admin Bar > Configuration > User Interface > Calendar Colors
2. Click into the box listed below desired department, board or committee
3. Select the color by clicking the outer ring and then click in the center square for the desired color
4. Click Submit button at the bottom

Homepage Quick Lnks Tab (if feature in use)

1. Go to the website homepage and click Edit
2. Locate Quick Links Section
4. Enter Title and URL
5. Optional to have it Open URL in New Window
6. Click Save and Close

URL Redirects

1. Go to the admin bar and mouse over Configuration, then Search and Metadata
2. Click on the link for URL Redirects.
3. Click Add Redirect
4. In the From field put the path to the items on the old website
5. In the To field put the new Path to the item on the new website

Citizen Action Menu Access (if feature in use)

1. Go to the Admin Bar > Structure, click on Menu
2. Click on List Links for the Citizens Action Center

Add a Button

1. To add a new entry click Add link at the over Menu Link title
2. Enter the name of Button to be displayed on Homepage
3. Enter URL into the Path field
4. Make sure Parent link show "Citizen Action Center"
5. Click Save button at the bottom of page.

Edit a Button

1. To edit an button entry click Edit
2. Update the name of Button displayed on Homepage
3. Update the URL into the Path field
4. Make sure Parent link show "Citizen Action Center"
5. Click Save button at the bottom of page.

Mega Menus – Custom Content Panes

1. Go to the Admin Bar > Structure, click on "Customer content panes"
2. Identify the appropriate menu and column that you want to change.
   - For Example, mega_menu_businesses_column1 references the Businesses mega menu and specifically Column1 of the mega menu
3. Click the Edit link at the end of the row associated with the menu you want to edit.
4. In edit mode you will see the Body section (also known as WYSIWYG editor). Make change in this section as you would in any other webpage free form area.

Main Menu

Do not make changes to this menu layout. Contact VTS for instructions or questions

Webforms Listing

1. Click Admin Bar > Content then Select Webforms
2. To modify click edit link end of row (Webform Training)
3. Click Submissions to view form submitted forms
4. Click Download, then click download button in upper right to create CSV to view form submitted

Report Generation for Email List Address Subscribers

1. Login
2. Append the "/subscribe/report" to the domain displayed in the URL (e.g. http://anytown.vt-s.net/subscribe/report)
3. Click the XLS button at the bottom to download into an excel file.

Masthead Slideshow (if feature in use)

1. Go to the Admin Bar click on Content menu option
2. Use "Show only items where" to filter on Slideshow/Gallery content type
3. Home Masthead Slideshow – click edit
4. Add a new file (repeat if you want additional ones)
5. Save and Close