Portal Agency Training Manual

Advanced Editors Guide

Drupal 7 – GeorgiaGov Platform

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Support: For further assistance, fill out a Support Request at http://portal.georgia.gov/support

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1.0 Review

1.1 Terminology

Absolute URL – a link that is formatted with a full web path, e.g. http://georgia.gov/education.

Alternative (or Alternate) Text – a sentence that describes what's happening in a graphic or photograph. Search engines and screen readers display alternative text for site visitors who have visual impairments. The better your agency's alternative text, the more accessible and user-friendly your site will be.

Block – a placeholder for content on a page, also known as a content area.

Box – a feature that is placed inside of a content area on a page (Page Elements)

Categories - the Master "tag" list for content on the GeorgiaGov Platform. This list is filled with high level categories that can define any content item.

Content Area – a placeholder for content on a page

Content Item – a piece of content (built with articles, images and videos) that typically corresponds to a single page on your agency's site and includes a title, an optional body and other customized fields. In Drupal, developers also refer to content items as **nodes**.

Content Type – the formatting you chose for a content item. Examples include blog posts, photo galleries and press releases.

Menu – a place to organize your content so that users can find it. The Navigation Menu is your primary menu for this.

Node – Drupal term for any Content item.

Relative URL – a link that is formatted with a partial web path and points to content on your agency's site. On GeorgiaGov, for example, the relative URL "/education" points to http://georgia.gov/education. These URLs work on all content types, although they do not work on the homepage.

Template - the layout and presentation display that your information "fits" into.

2.0 Managing the IMCE (Image & File Upload)

While many Web managers treat content management systems as substitutes for file management systems, it's important that you not fall into that behavior on the Drupal platform. The image and file upload area, or IMCE, is not built to serve as an archive for content. It's just a temporary holding place for files, whether they be JPGs, DOCs or PDFs, that you deliver to your site visitors. Because the IMCE is not a file management system, remind others at your agency to back up all files they send to you for upload.

Generally, you won't access the IMCE directly. Most often you'll visit the area when you're uploading an image from the WYSIWYG of a site page, press release or other content type. If you do need to access your IMCE directly, go to **youragency.georgia.gov/imce.**

When you arrive, you'll notice at the top of the IMCE a master toolbar with options to upload and delete files, create image thumbnails, resize images, search for files and manage directories.

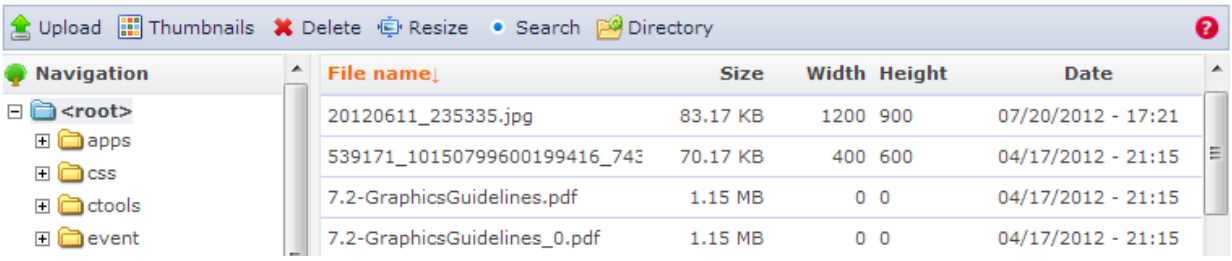


Figure 1 IMCE Tools and Navigation

You'll also notice in the left navigation, the master directories structure for your site. Of the dozen or more directories listed here, you'll most often curate the images and files in these:

Directory	Purpose
Root	Stores all sub-directories that organize a site's files and images
Event	Stores thumbnail images attached to events listings
Imagebox	Stores images that display on a homepage image box
Photo_Gallery	Stores images that display in a site's photo galleries
Profile	Stores the headshots attached to profile pages
Promotionbox	Stores images that display on a homepage promotion box
Promotionlist	Stores images that display on a homepage promotion list
Related_Files	Stores files and images that display on site pages, press releases and other content types
Rotator	Stores images that display on a homepage rotator
Video	Stores thumbnail images for video pages
Webform	Stores the files Webform respondents submit to your agency. ***Note**: If you created a new directory when you built your Webform, you'll find that new directory under this Webform directory.*

2.1 Uploading Files & Images

To upload a new file into your system:

1. Select the directory you'd like to upload your file into.

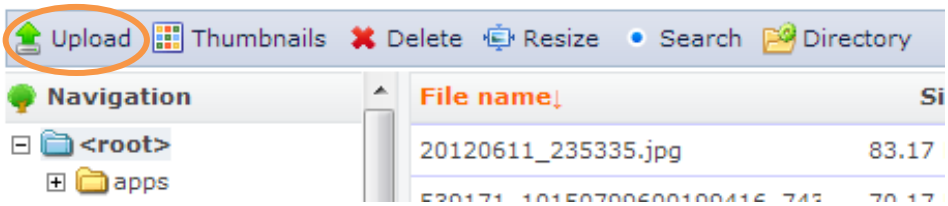


Figure 2 Uploading a file to IMCE

2. In the master toolbar, click **Upload,** and then from the box that appears, click **Choose File**.
3. Browse your computer for the file you need, and select that file.
4. If you'd like to create a thumbnail of your image, check one of the Small, Medium or Large options.

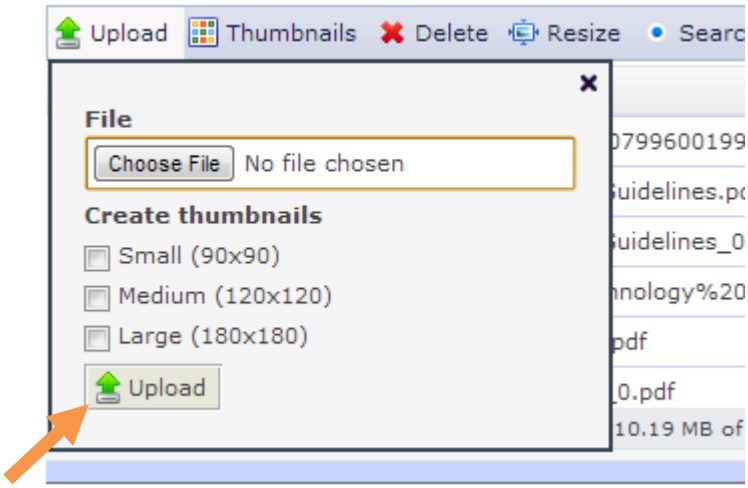


Figure 3 Uploading an image to the IMCE

5. Click the bottom **Upload** button.

If you are using the IMCE directly from a WYSIWYG field on a content item, you can then click the **Insert** button in the toolbar to insert the image into the field.

2.1.1 Naming Conventions

Because you'll offer many files and images to your site visitors, it's easy for the contents of your agency's IMCE to become difficult to manage. By standardizing your file naming convention, you can effectively reduce some of this backend confusion.

Web managers generally recommend one of three conventions for file naming:

Naming Convention	Example
Hyphens	**new-agency-policies.pdf; Application-for-Service.doc**
Camel Case (no spaces)	NewAgencyPolicies.pdf; ApplicationForService.doc
Underscores	New_Agency_Policies.pdf; Application_for_Service.doc

While any of these is acceptable, we recommend using hyphens because that format will mirror the Drupal platform's friendly URL format.

DO NOT use spaces in your file names. Some browsers, such as Internet Explorer, will display the space as **%20**. So, in your status bar, the file name "New Agency Policies.pdf" will read "New%20Agency%20Policies.pdf." In some cases, having a file name with spaces can create a problem wherein the link does not work or causes references to the file within Drupal to break.

Also keep in mind that it's best to avoid naming a file with a mix of conventions. This happens frequently on state agency sites, particularly when more than one editor works on a site. This mix of conventions in file naming will over time contribute to the IMCE seeming cluttered and unusable.

After you pick a file naming convention that works best for your site's needs, make sure to share that convention widely with other editors on your site.

2.2 Searching for Files

To Search for files in the system:

1. In the master toolbar, click **Search,** and type in part of the file name.
2. Check *Case Insenstive* if you want the search to find all versions regardless of letter case.
3. Click **Search**.

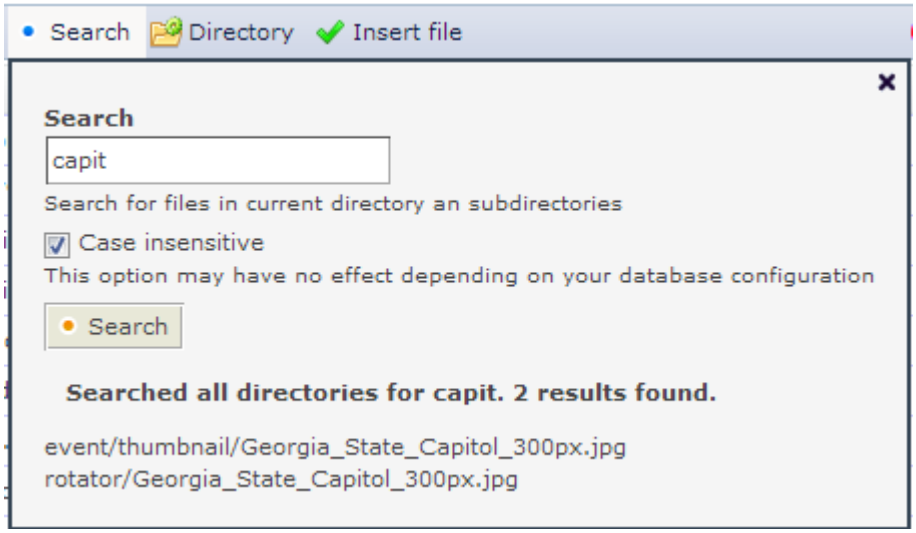


Figure 4 IMCE Search Results

The system will return a list of results. From these results, you will have the relative path of the file, which you can use to navigate to the appropriate directory and find your file.

For example, to find the **Georgia_State_Capitol_300px.jpg** file located at:

event/thumbnail/Georgia_State_Capitol_300px.jpg

you would navigate to the **event** directory, then the **thumbnail** directory, and find it there.

2.3 Creating Image Thumbnails

To create image thumbnails:

1. Highlight the image that needs a thumbnail.
2. In the master toolbar, select **Thumbnails**, and check the box for the thumbnail dimension you need.
3. Click **Create Thumbnails**.

The system will generate a thumbnail image and name it based on the dimension you selected.

2.4 Resizing Images

If the image you have is too large for your website, you can use the IMCE to resize the image to the appropriate dimensions for your needs. DO NOT use the Resize tool to try to make an image *larger* than the original, as the resulting image will be of poor quality. The Resize tool should only be used to make an image *smaller* than the original.

To resize images:

1. Highlight the image that you want to resize.
2. In the master toolbar, select **Resize**, and input a new Width or Height. The IMCE will adjust the other dimension to maintain the appropriate proportions.
3. If you want to keep the original file intact, keep "Create a new image" checked.
4. Click **Resize**.

The system will generate your resized image and, if you chose to create it as a new image, append **_0** to the file name.

2.5 Deleting Files & Images

Deleting a file or image is not as straightforward as uploading one. If a Site Page, Press Release or other content item references a file, you ***will not*** be able to delete that file from the IMCE.

To delete a file from the IMCE:

1. Identify which content items reference the file you want to delete.
2. For each content item that contains this file:
   a. Edit the content item
   b. Delete the file reference from those content items.
   c. Go to the **Moderation** tab for that Content Item, and *delete all other revisions* of the content item.
3. Go to the IMCE at **youragency.georgia.gov/imce**
   d. Find the file from the navigation structure
   e. Click on the file name to select it.
   f. Click **Delete** from the IMCE toolbar.

Keep in mind that your IMCE is not a file management system. The IMCE's purpose is to ensure that your site's links don't break. For that reason, the IMCE is by nature protective of its content. In most cases, deleting any reference to the file from your live content items will effectively remove the file from being accessed by visitors, so you won't need to delete the actual file.

2.6 Managing Directories

Because you'll most often access your IMCE through a content item, there will be little reason for you to add directories. Just as it is with files, removing directories is not as straightforward as adding them. Once you create a directory and make a reference to a file in that directory from a content item, it will be difficult to delete. For this reason, we suggest leaving directories in your system, even if you are no longer actively using those directories.

To create a new directory:

1. Select the parent directory you'd like to place your new sub-directory in.
2. In the master toolbar, select **Directory.**
3. Type in the new sub-directory name.
4. Add the directory.

3.0 Webforms

When you need to collect information or feedback from your site visitors, you'll need to build a webform. Many agencies use webforms to build interactive *Contact Us* pages, for example.

After visitors fill out the form, those form results can be stored in a number of ways. You can send their responses to a recipient via e-mail, and view results when you're logged into Drupal. You can also export the results into an Excel spreadsheet to review data trends.

3.1 Building a Webform

To start building your webform:

1. From the Admin Toolbar's shortcut area, click on **Add Content.**
2. From the **Add Content** screen, select **Webform.**
3. Add a **Title**. This title should be unique for each webform you build, as it will create the page URL and serve as a reference when you *Search Content*.
4. Enter introductory **Body** text. This text will display directly above your form.
5. If you'd like to publish your webform at a later date, you can set a future date in the **Scheduled Date** fields.
6. Add terms to **Categories**, so that search engines know what topics your webform addresses. ***Note:*** *Once you start typing in your term, you should see an auto-complete list drop down. Select the correct term from the dropdown. If your term doesn't prompt the dropdown to display, you can leave this section blank.*
7. Under **Menu Settings**, ***do not*** check "Provide a menu link" yet. Only after you've built your entire form and checked it for accuracy will you want to create a menu link.
8. When you're done, **Save** the beginning of your form.

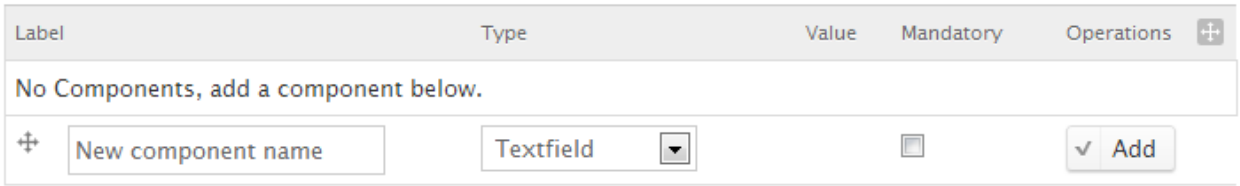
3.1.1 Understanding Components

You'll now need to add **Components** to your new form. Components create the interactive fields that allow visitors to submit their names, e-mail addresses and other responses. Drupal offers a number of components you can use:

Component	Purpose
Date	Allows respondent to specify a date by Month, Day, and Year format. User can also select a date using a pop-up calendar.
E-mail	Requires a response in e-mail address format.
Fieldset	Allows you to organize multiple components in one section and make the section collapsible.
File	Allows the respondent to upload a file.
Grid	Creates a multiple-choice survey table.
Hidden	Allows you to submit additional information about the form's processing to a Web application. Your form respondents will not see these fields. (Because this field's function is so specific, it's unlikely that you'll need to use it. To learn more about Hidden fields, visit Drupal.org.)
Markup	Allows you to add additional text between interactive component fields.
Number	Accepts only numerical data.
Page Break	Creates a multi-page form with a "Next" button to advance to the next series of form fields.
Select Options	Allows for creation of dropdown lists, select lists, checkboxes and radio buttons.
Text Area	Allows the respondent to enter a block of text. (e.g. comment fields)
Textfield	Allows the respondent to enter one line of text. (e.g. name field)
Time	Allows respondent to specify a time by Hour and Minute.

Once you know the information you need to gather from your form and determine which components will work best, you'll continue building your form on the Webform Components page. To add components:

1. Under **Label**, type in the *New Component Name* field. This is the title for your field. So, if you want to collect a respondent's name, you'll type in "Name" for *New Component Name*.
2. Under **Type**, select the type of component you need (see list above for descriptions).
3. If you'd like to make the field **Mandatory**, select the checkbox.
4. Under **Operations**, click to **Add** the component.



You'll be directed to a new screen to add more information about that one component. The following section outlines the settings you will see on your next screen based on the component type you select.

3.1.1.1 Date component

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Default Value Timezone** – which timezone you'd like data to reference.
- **Validation** – to make the field *mandatory* and set parameters on the date itself. By default, the start date can fall two years before the date of the webform submission, and it can extend two years after the webform submission. You can change these parameters to best suit your needs.
- Under **Display**, check if you want the **popup calendar** to display, or show the year as a textfield.

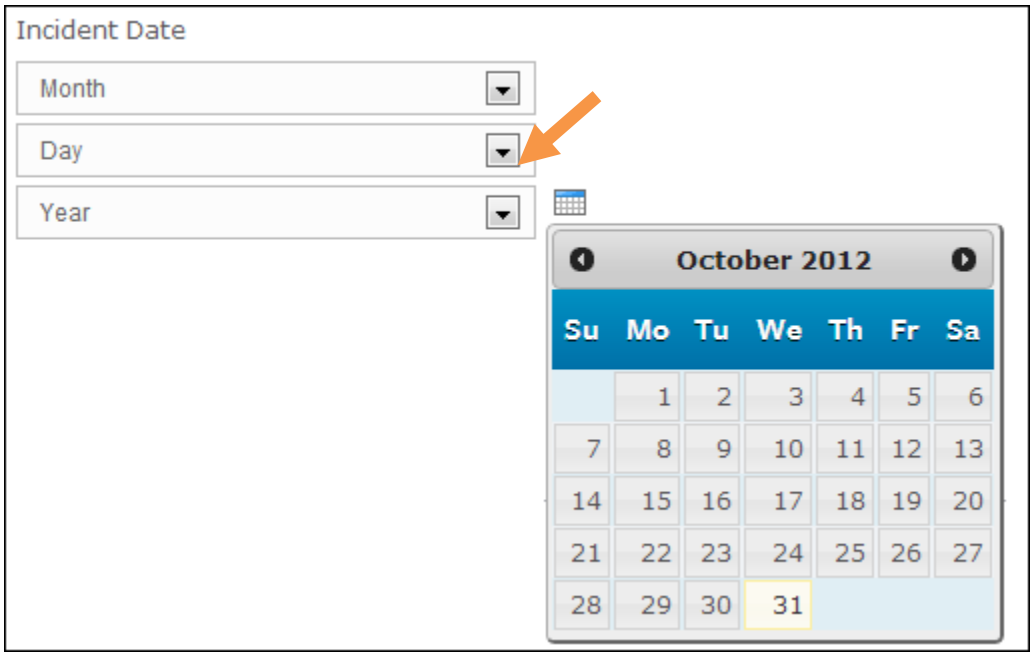


Figure 5 Date field with popup calendar

- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, click **Save**.

3.1.1.2 E-mail

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **User e-mail as a default** – prepopulates the field with the e-mail address of a person logged into the system (*typically not needed – leave this unchecked*).
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation** – check to make the field *mandatory*. You can also make it *unique*; this will check to make sure no one has entered that e-mail address into this form before. (Useful if you want to ensure that each person only fills out a form once).
- **Width** – Not used. Because your agency site uses a particular theme that comes with defined styles (via its cascading style sheet, or CSS), this setting is overridden.
- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Disabled** – check if you don't want respondents to type an answer into this field.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.1.1.3 Fieldset

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Description** – this help text will display beneath the fieldset's label and guide respondents as they answer.
- Check to make the fieldset ***Collapsible***, and you can chose to have the fieldset show as ***Collapsed by default***. Unless your form is long, there's little reason to make the fieldset collapsible.
- If you don't want the field label to display, you check to ***Hide label***.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

After saving, you'll return to the main Webform page, where you will need to click and hold on the handle to the left of the components to drag-and-drop other components into your new fieldset (nested components will be indented under the fieldset).

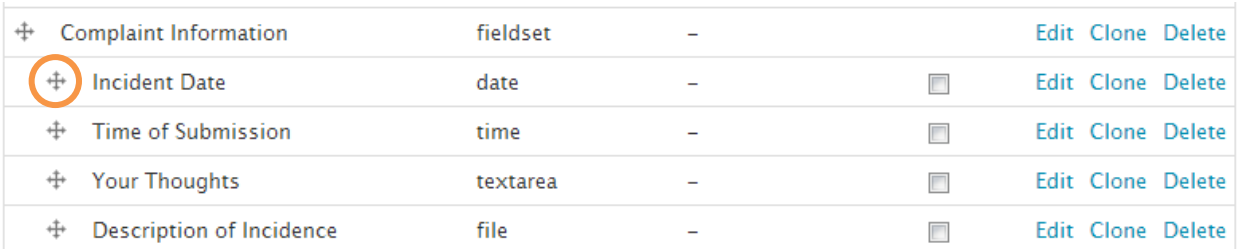


Figure 6 Components nested under a fieldset (*handle for drag-and-drop is circled*.

3.1.1.4 File

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Description** – help text that will show beneath the field to guide respondents as they answer.
- Select which **Upload Directory** you'd like to store your files. By default, the system stores your files in the *webform* directory. Optionally, if you'd like to store files in a folder under the webform directory, type in your new directory name. Your image and file upload area, or IMCE, will create this new directory as a sub-directory of its root folder. (***Note**: be sure to follow standard web folder naming conventions and do not include spaces or special characters in your directory name.*)

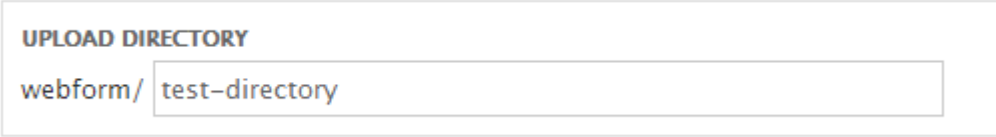


Figure 7 Upload Directory with new directory added

- **Validation** – check to make the field *mandatory*. You can also define what your maximum file upload size will be and what file extensions you'll accept.

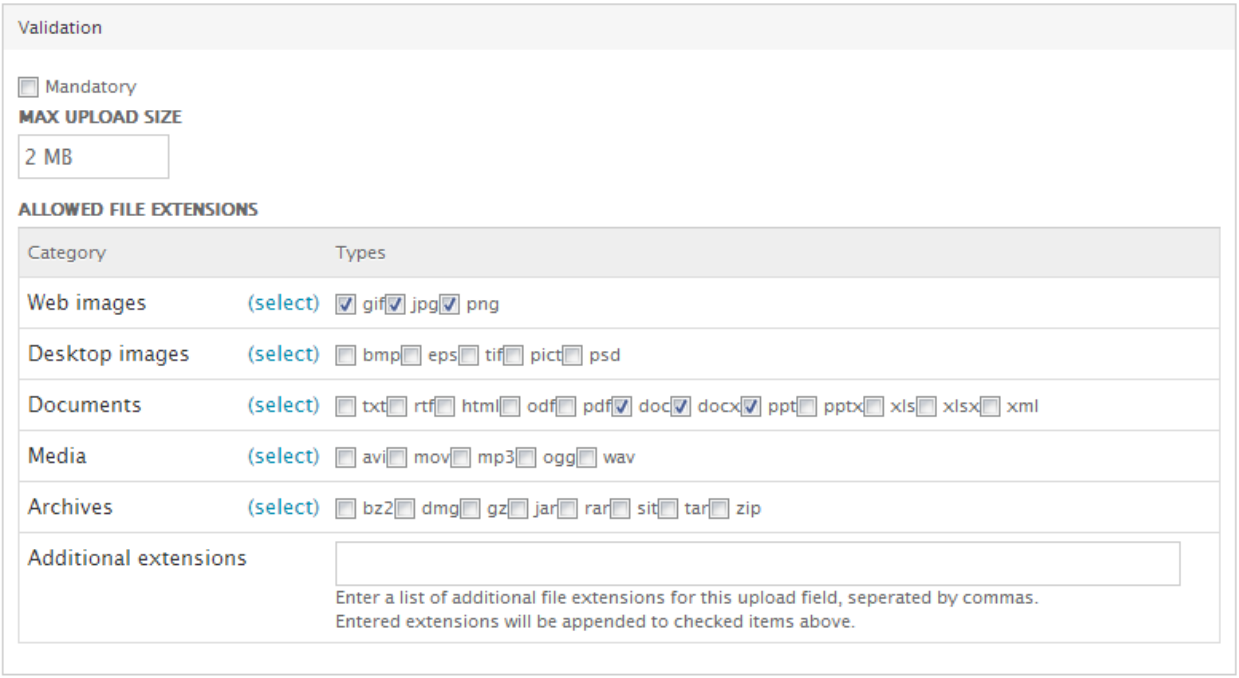


Figure 8 Validation options

- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Progress Indicator** – shows while a file is in the process of uploading. Choose between the ***throbber*** or the ***bar with progress meter***.

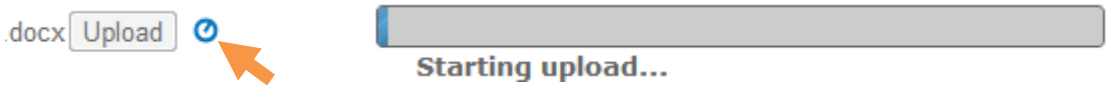


Figure 9 Progress Indicators: Throbber (left), Bar with progress meter (right)

- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.1.1.5 Grid

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

- Under **Options**, type in the multiple-choice options you're offering respondents. You'll also need to add **a key,** or short identifier, for each of those options. You'll divide your key from its option using a vertical bar. So, for a satisfaction survey, your options could look like this:

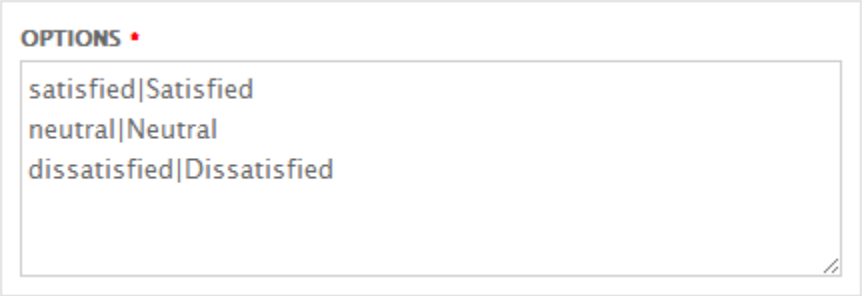


Figure 10 Grid Options field

Note: *To type in a vertical bar, press* ***Shift*** *+* **** *(the backslash key). The backslash key is directly above Enter.*

- Under **Questions**, type in the multiple-choice questions you're asking respondents. Again, add a key for each of those questions, and divide your key from its question using a vertical bar. For the satisfaction survey, your questions might read:

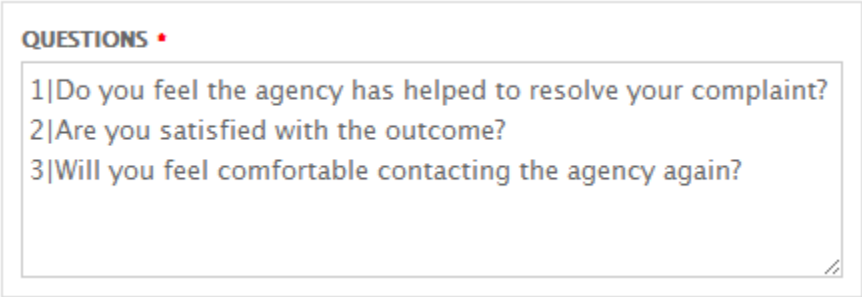


Figure 11 Grid Questions field

Optional fields:

- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation** – check to make the field *Mandatory*.
- Under **Display**, you can opt to *Randomize* the order of the Options and Questions. You can also check *Hide Label* if you don't want the form component's label to show.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**. Below is an example of a completed Grid component.

	Satisfied	Neutral	Dissatisfied
Do you feel the agency has helped to resolve your complaint?			
Are you satisfied with the outcome?			
Will you feel comfortable contacting the agency again?			

Figure 12 Grid component

3.1.1.6 Markup

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Value –** this is where you add whatever text you need in the middle of your form.

When you've finished filling out the form, **Save**.

3.1.1.7 Number

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation** – check to make the field *mandatory*. You can also make it *unique*; this means that the same value cannot be used by any other respondents.
- Also under **Validation**, determine whether you'd like your respondents to type in only *integers* and set a *minimum* to *maximum* range for numbers. So, if your field asks about age, and you want to see forms from respondents of professional working age only, you might set your minimum as 21 and maximum as 65.
- If you want to collect information at numerical intervals (*i.e.* the sequences ***2, 4, 6*** or ***5, 10, 15***), you can also choose a *step.*

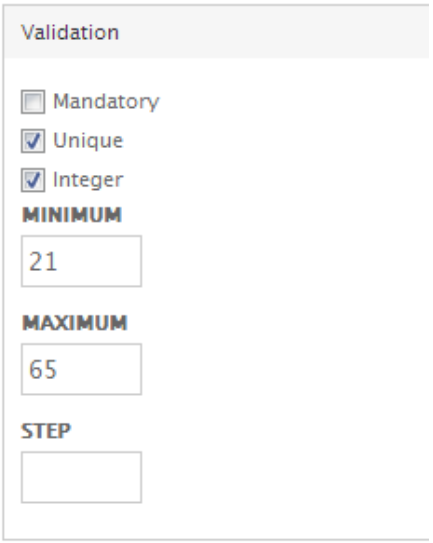


Figure 13 ***(Right)*****Sample Number Validation fields**

- Under **Display**, choose whether you'd like to collect information from a *text field* or from a *select list*. In this area, you may also add *labels* to either side of the field, determine how many *decimal places* you'll accept and select styling for the *thousands separator* and *decimal point.*
- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*
- **Analysis** - If, when you analyze your data, you'd like to ignore instances of the input value "0," check *Exclude Zero.*

When you've finished filling out the form, **Save**.

3.1.1.8 Page Break

Your **Label** already shows the field name you've selected, and the **Field Key** automatically fills in based on that label. For this component, simply click **Save**.

3.1.1.9 Select Options

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

- **Options –** type in the options you're offering respondents. You'll also need to add **a key,** or short identifier, for each of those options. You'll divide your key from its option using a vertical bar. For example, if you were to build a multiple option list that asks respondents how they get community news, it could look like this:

  OPTIONS •

  Blog| I follow community blogs.
  Newspaper|I read the newspaper.
  Radio| I listen to my local radio station.
  Television| I watch the local newscasters.

  Note: *To type in a vertical bar, press* ***Shift*** *+* **** *(the backslash key). The backslash key is directly above Enter.*

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **Description** – help text that will show beneath the field to guide respondents as they answer.

Your list can take on one of the following display options based on your settings:

Listbox: not checked, **Multiple**: checked ☐ I follow community blogs. ☐ I read the newspaper. ☐ I listen to my local radio station. ☐ I watch the local newscasters.	**Listbox**: not checked, **Multiple**: not checked ○ I follow community blogs. ○ I read the newspaper. ○ I listen to my local radio station. ○ I watch the local newscasters.
Listbox: checked, **Multiple**: checked I follow community blogs. I read the newspaper. I listen to my local radio station. I watch the local newscasters.	**Listbox**: checked, **Multiple**: not checked I follow community blogs.

- **Multiple** – check if you'd like users to be able to select more than one option, or if you'd like to build a checkbox for a single option. ***Note:*** *All single options will by default display as radio buttons, not check boxes. That's why you would need to select "Multiple" for a single option checkbox.*
- You can also choose to ***Load a pre-built option list***; you can use a pre-built list to list countries, days of the week, or US States.
- Under **Validation**, you can make the field *mandatory*.
- Under **Display**, check *Listbox* if you'd like the options to show in a dropdown selector. If you'd like to put the options in a random order, check *Randomize Options*
- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.1.1.10 Text Area

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation** – check to make the field *mandatory*.
- **Display** - *Width* and *Height* are not used. *Resizable* is checked by default. If you don't want users to be able to resize this box manually, uncheck the *Resizable* box. If you don't want the field label to display, check *Hide Label*. To prevent respondents from entering text into the field, check to *Disable* the field. ***Note:*** *Because this may confuse your respondents, we do not recommend that you disable a field.*
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.1.1.11 Textfield

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank.
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation** – check to make the field *mandatory*.
- **Display** - *Width* and *Height* are not used. *Resizable* is checked by default. If you don't want users to be able to resize this box manually, uncheck the *Resizable* box. If you don't want the field label to display, check *Hide Label*. To prevent respondents from entering text into the field, check to *Disable* the field. ***Note:*** *Because this may confuse your respondents, we do not recommend that you disable a field.*
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*
- Under **Validation**, you can make the field *mandatory*. You can also make it *unique*; this will check to make sure no one has entered the same text into this form field before (useful for creating unique usernames, for example). Entering a number into *Maxlength* sets the maximum number of characters a person can fill into this form field.
- **Width** – Not used. Because your agency site uses a particular theme that comes with defined styles (via its cascading style sheet, or CSS), this setting is overridden.
- You can add text **Labels** to the **Left** or **Right** of the textfield, if necessary.
- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Disabled** – check if you don't want respondents to type an answer into this field.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.1.1.12 Time

Mandatory fields:

- **Label** already shows the field name you've selected
- **Field Key** automatically fills in based on that label.

Optional fields:

- **Default Value** – text to automatically display in the field itself. If you don't set a Default Value, the field will be left blank. ***Note***: you may input strings such as **now**, **+2 hours**, and **10:30pm** as valid responses.
- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Default Value Timezone** – chose which timezone you'd like data to reference.
- **Validation** – check to make the field *mandatory*.
- **Time Format** – select whether you'd like your time field to display standard 12-hour (AM and PM) or 24-hour military time.
- **Label Display** – can be set to ***None*** from the label display dropdown if you don't want the label to show.
- **Private** – checking this box limits who from your agency can see the results from that field. Because only one or two contacts at your agency will likely ever see these results, this option to add privacy to a field is not so important. ***Note:*** *We recommend just leaving that box unchecked.*

When you've finished filling out the form, **Save**.

3.2 Completing a Webform

Once you've added all the components you need for your Webform:

1. Place all the components in the desired order for the form by dragging the handle on the left hand side of the component's title (*see diagram*).

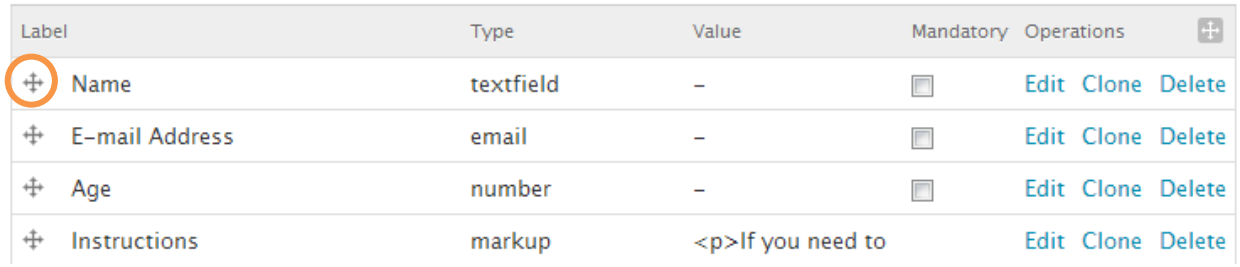


Figure 14 Rearranging Form Fields

2. **Save** your changes by clicking the Save button at the bottom of the form.
3. In the Webforms toolbar, mouse over **+ Form Components.** You'll see dropdown selections for **E-mails** and **Form Settings.**

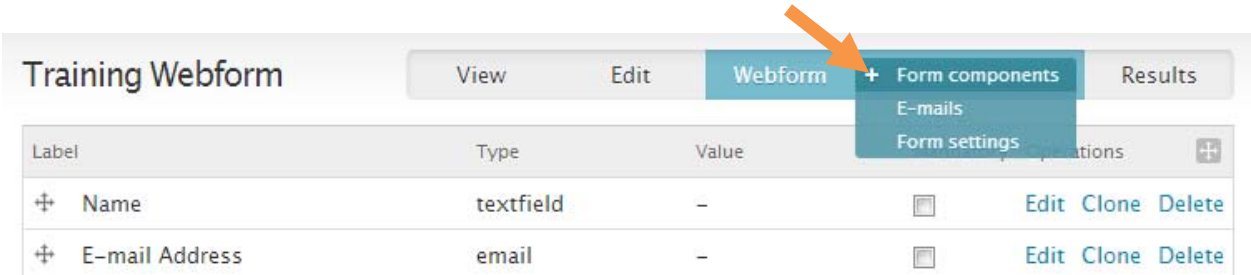


Figure 15 Accessing Form Components

4. First, click on **Form Settings**.
   a. **Confirmation Message** - type in the text that should display once a respondent has submitted the form.
   b. If you don't want to show a confirmation message but instead want to send the respondent to another page on your agency website, select the radio button for *Custom URL* under **Redirection Location**, and type in the URL on your website to which you want to direct users. ***Note:*** *We recommend including a confirmation message; some respondents may not think their forms have been delivered unless they read a confirmation.*
   c. Set a **Total Submissions Limit** only if you want to receive a predetermined number of forms, and close the form after the limit has been reached.
   d. Set a **Per User Submission Limit** only if you want to receive a limited number of forms from each individual.
   e. Select the **Status of This Form**. If it's a new form, you'll want to leave the status *Open*. When you no longer need to collect data from the form, but you still want the inactive form to be available on your site, change the status to *Closed*.
   f. Under **Submission Access**, do not make any changes to this form. Drupal considers your site visitors to be *anonymous users*.

g. Click the **Advanced Settings** header to see more settings. From here, you can:
    - Make your webform **available as a block**; this is helpful if you want the webform to show on your homepage. ***Note:*** You'll still need to contact GTA support to place this block on your homepage.
    - Show your complete form as a teaser.
    - Allow *authenticated users* – your site's editors – to save their own submission drafts.
    - Automatically save drafts of a multi-page form.
    - Remind respondents if they've already previously submitted a form.
    - Change the **Submit Button Text**.

5. When you're done formatting the settings, click **Save Configuration**.
6. At the top of the form settings page, you'll see the confirmation, "The form settings have been updated."
7. Now, in the Webforms toolbar, click **View** to see your finished form.
8. Once you're happy with your finished form, you will want to make it available on your website.
    a. **Edit** the Webform
    b. Under **Menu Settings**, check *Provide a Menu Link* and select where your link should appear on your website.
9. Click **Save**.

Your new Webform is now accessible to the public, and it can start collecting data.

When you need to access your Webform again to make edits, you can either navigate directly to the form from the front end of your site, or you can *Search Content* to find the form by its title. ***Note:*** *Unlike other content types, Webform does not use Workbench, and so you will not see your forms listed there.*

3.3 Setting Up E-mail Recipients for a Webform

To send Webform results to a person or people within your agency:

1. Navigate to your new Webform, and click the **Webform** tab.
2. In the Webforms toolbar, mouse over **Form Components** and select **E-mails**.
3. In the *Address* field, type in the complete e-mail address of a person who should receive individual form results, and click **Add**. You'll be sent to a form which will allow you to add more detail:
    a. **E-mail Header Details** - how you want the submission to display its *Subject*, *From Address*, and *From Name*.
    b. **E-mail Template** - you can opt to send the default template, or you can build a custom template. ***Note:*** *Because building custom templates requires greater knowledge of Token values, we'd suggest using the default settings.*
    c. Click **Included E-mail Values** to further customize your e-mail by selecting which fields your recipient will see. If you want the recipient to see only certain components, you can check those particular components and deselect the others.
4. When you're done formatting this e-mail address, **Save E-mail Settings**.

You can add a number of e-mail recipients to your new webform this way.

3.4 Viewing & Exporting Results

To review Webform results:

1. Navigate to your new webform, and select the **Webform** tab.
2. In the Webforms toolbar, select **Results**.

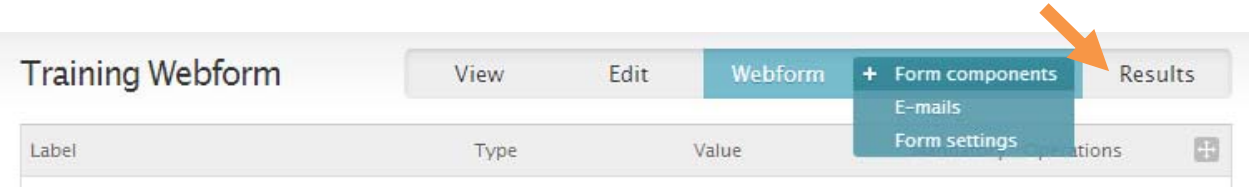
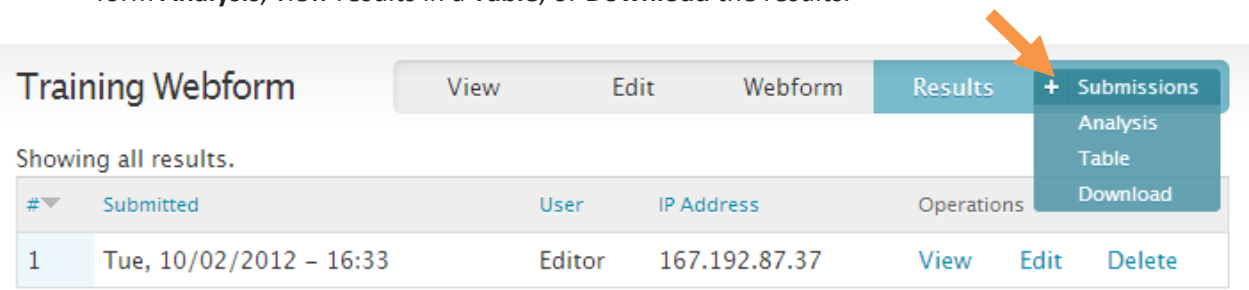


Figure 16 Viewing Form Results

3. From here, you can *View*, *Edit* or *Delete* individual submissions that have come into your system. You can also see your respondents' IP addresses.

4. In the Webforms toolbar, you can also mouse over **Submissions** to look at a comprehensive form **Analysis**, view results in a **Table**, or **Download** the results.



3.4.1 Downloading Results

To download your Webform results:

1. After you open the **Download** tab, you'll select your **Export Format** - either *Delimited Text* or *Microsoft Excel*.
2. If you chose to download in *Delimited Text*, you'll also select your text format. The default is set as the *Tab* format.
3. Under **Select List Options**, choose if you'd like your keys to display as either full, human-readable options or short, raw options. It's generally easiest to read the first of these.
4. Decide how you want select list data to display. It will export either as separate data or as compact data.
5. Select which components you'd like to include in your export. By default all components will be checked.
6. Under **Download range options,** select which submissions you'd like to include in the report. You can limit your submissions by number or date submitted.

3.5 Editing a Webform

To **add** fields to a Webform:

1. Navigate to your new Webform, and select the **Webform** tab.
2. Add your new components and arrange them as needed.
3. Save the form.

When you need to **delete** fields from your Webform, first ask yourself whether you may ever need to reference those fields' results from previous entries. ***Once you delete a field, all results data associated with that field will also delete.*** If you still need to remove a field, but you'll need to reference that field data at some later point, you will want to either:

- Export all your results data for future reference, and then delete the necessary fields.
- Close your current Webform, and then build a new Webform.

3.6 Closing or Deleting a Webform

When you've finished collecting all data, you can either close or delete your Webform. A **Closed** webform still has a page available on the website but with a message stating that the form has been closed. You can always refer to data gathered from a closed webform in the backend. A **Deleted** webform will no longer appear anywhere on the website, and all data in the backend will be deleted.

To **Close** your Webform:

1. Navigate to your webform, and select the **Webform** tab.
2. In the Webforms toolbar, mouse over **Form Components,** and select **Form Settings.**
3. Scroll down to **Status of your form**, and select a *Closed* status.
4. Save your configuration changes.

To **Delete** your Webform:

1. Navigate to your new webform, and select the **Edit** tab.
2. Delete the webform, just as you would a site page or press release.

4.0 Taxonomy

Taxonomy is a way to classify your content, similar to tagging or categorizing your content. Taxonomy makes it possible for your content to appear in lists filtered by topic.

A site's taxonomy consists of several **vocabularies** (such as "Color"). Each of these vocabularies contains several **terms** (such as "Red", "Yellow", "Blue", etc.).

Your platform contains a few useful vocabularies that are applied to various content types:

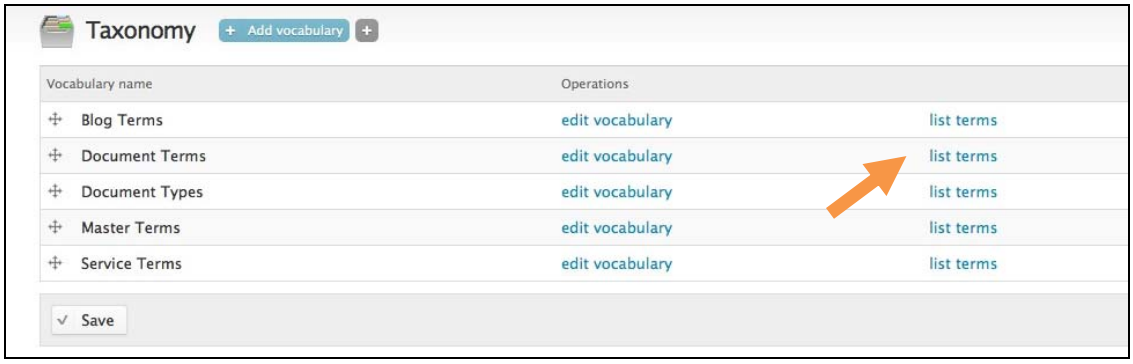
Vocabulary	Purpose
Blog Terms	Used for tagging Blog Content.
Document Types	Used for organizing Documents by type. Users may then filter documents from those terms.
Categories	Used as the master vocabulary for all platform sites
Topics	A "free tagging" vocabulary used to associate content with a common topic.

A user with Taxonomy Manager capabilities can add, edit, or remove terms from these vocabularies to customize them for an individual site.

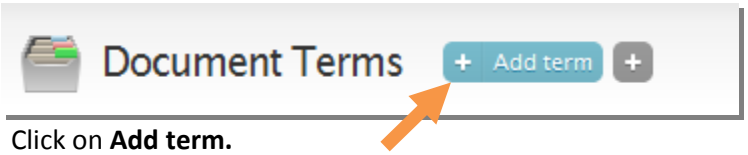
4.1 Adding Taxonomy Terms

To add or view new taxonomy terms:

1. From the Admin Toolbar, click on **Structure.**
2. From the Structure menu, select **Taxonomy.**



3. Click on **list terms** to view the existing terms of a vocabulary to confirm the term you want to add doesn't already exist.



4. Click on **Add term.**

a. Type your term in the **Name** field. Click **Save**.

4.2 Edit and Delete Taxonomy Terms

To edit a taxonomy term:

1. From the Admin Toolbar, click on **Structure.**
2. From the Structure menu, select **Taxonomy.**
3. Click on **list terms** to view the existing terms of a given vocabulary.

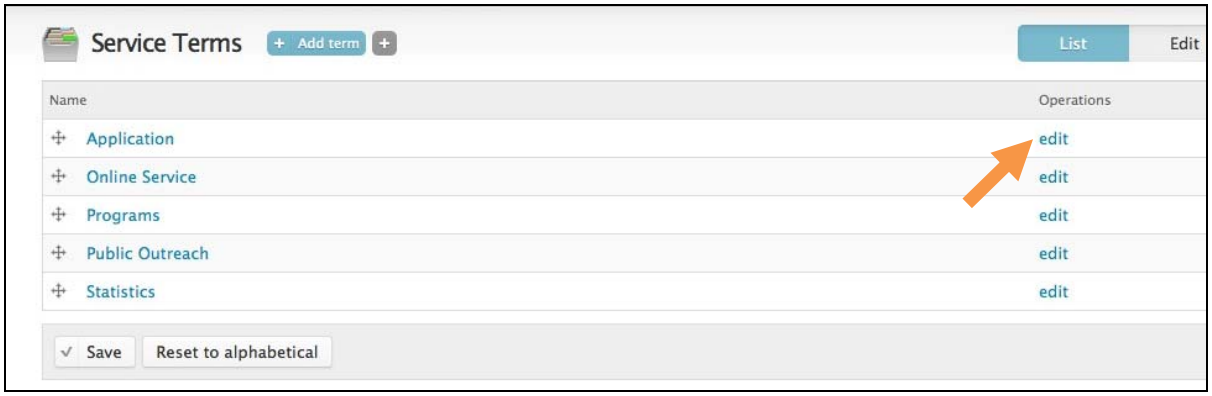


Figure 17 Editing a vocabulary term

4. Click **edit** next to the term you would like to edit in the vocabulary
   a. To edit the term, change the Name of the term and click **Save**.
   b. To permanently delete the term, click **Delete**.

5.0 Administering Users

5.1 Site Users and Roles

- The term **user** represents one person and one e-mail address.
- A **role** determines what tasks (creating new content, editing content, managing menus) a user can perform.
- Users may have more than one role; while one user may serve as only an editor, another may serve as both an editor and taxonomy manager.

5.2 Platform Roles

The GeorgiaGov Enterprise platform has four user roles that apply to agency content managers:

- **Creators** can create and edit content, but CANNOT publish content. A creator also CANNOT make edits to the homepage, landing pages, or navigation menus.
- **Editors** can create, edit, and publish content. An editor CAN edit the homepage and other landing pages, as well as the main navigation of the site.
- **Taxonomy Managers** can edit controlled **taxonomies** used on Georgia.gov or across the platform.
- **User Managers** can add, edit, and delete users from an agency website, as well as assign those users to the roles listed above.

	Create Content	Edit Content	Save Draft	Save as Needs Review	Publish Content	Schedule Content	Manage Menus	Manage Homepage	Create Webforms
Creator	X	X	X	X					
Editor	X	X	X	X	X	X	X	X	X

5.3 Creating a User

If you are the Web Manager for your agency website, your user account will have the User Manager role. As a user manager, you can add new users to your system, and assign them the roles of Creator or Editor.

1. From the Admin Toolbar, click on **People**
2. Click on **+ Add user**

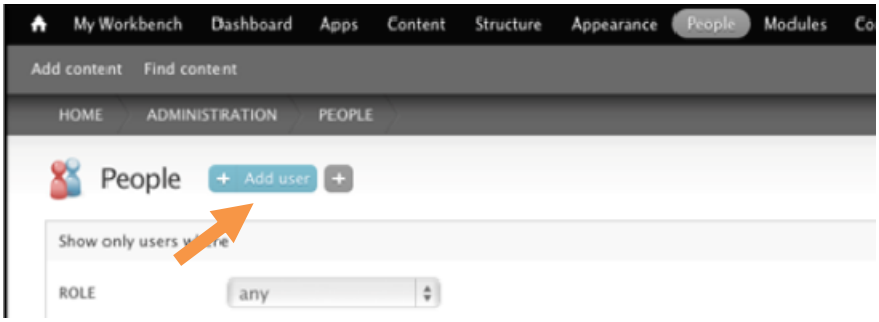


Figure 18 Adding a User

The Add User form will appear.

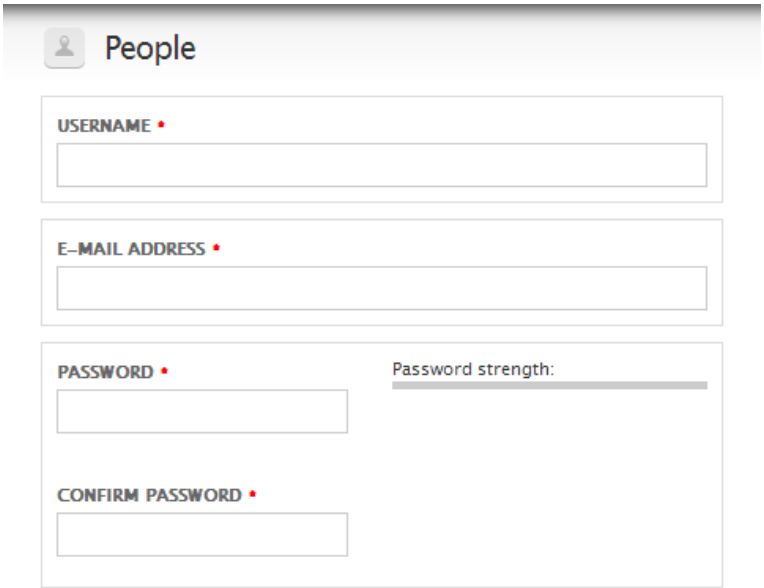


Figure 19 Adding a User

a. Enter a **Username** in the designated field.

***Note**: Usernames in Drupal may contain spaces and capital letters. Please note that user names are case sensitive.*

b. Enter an **e-mail address**. E-mail addresses must be in the proper format (name@site.com).

***Note**: You cannot create two users with the same e-mail address.*

c. Enter a **password** in each password field. This is only a temporary password for account set-up; upon first log-in, the new user will create a unique, secure password.

***Suggestion**: A secure password is one that is at least eight characters long, and contains an uppercase letter, a lowercase letter, and either a number or special character.*

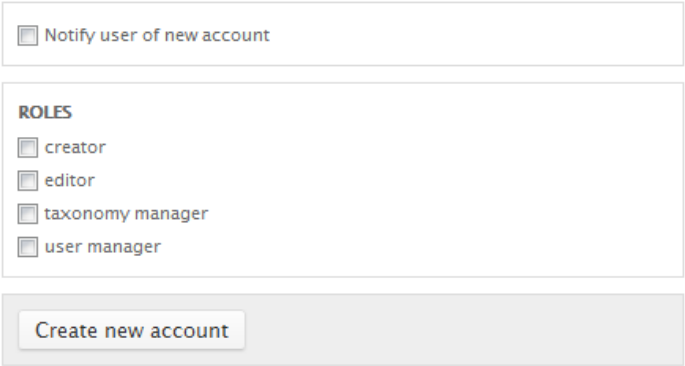


Figure 20 Adding a new user

3. Check "Notify user of new account" to send the user an e-mail with their login information. ***Note:*** If you forget to check this box, you'll need to send the new user an e-mail with the Web address for the login screen and have the user "Request a New Password."
4. Check the appropriate Roles box(es) for that user. *(See Section 2.2 for explanation of Roles).*
5. Click **Create new account.**

5.4 Unblocking accounts

A user account may be blocked if:

- The user tries to log in too many times with the wrong password.
- A User Manager blocks the account.

Anyone with a User Manager role may unblock an account.

1. From the Admin Toolbar, click on **People.**
2. Check the checkbox next to the user(s) whose accounts you would like to unblock.
3. Select "Unblock the selected users" from the dropdown list and click **Update.**

5.5 Blocking accounts & IP Addresses

User Managers may also block a user's account and individual IP Addresses.

5.5.1 Blocking an Account

4. From the Admin Toolbar, click on **People.**
5. Check the checkbox next to the user(s) whose accounts you would like to block.
6. Select "Block the selected users", and click **Update.**

5.5.2 Block an IP Address

1. In the Admin Toolbar, click on **Configuration.**
2. Click on **IP address blocking.**

3. Enter in the IP Address you'd like to block, and click **Add.**

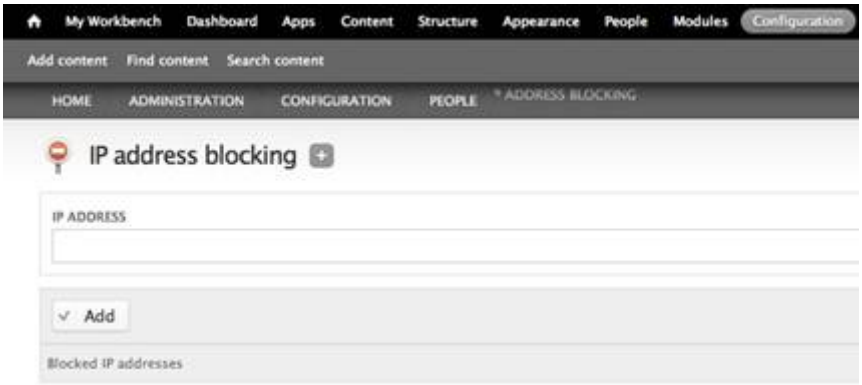


Figure 4 IP address blocking

6.0 Checking for Broken Links

While a number of online tools can help you find broken links on your site, Xenu's Link Sleuth is free and reliable. Xenu scans your site to identify both external and internal broken links and provides you a report that points you to the site pages that reference these broken links.

Visit http://xenus-link-sleuth.en.softonic.com/ to download and install Xenu's Link Sleuth.

After you install Xenu and open the application, you'll see a *Tips & Tricks* pop-up window. If you'd like to disable this pop-up window in the future, uncheck the pop-up prompt checkbox.

You'll now be looking at a large, empty, gray window. When you run your site's links report, the report will fill in on this window.

To run the report:

1. Under **File,** select *Check URL*.
2. In the first blank field, type in your site's Web address.

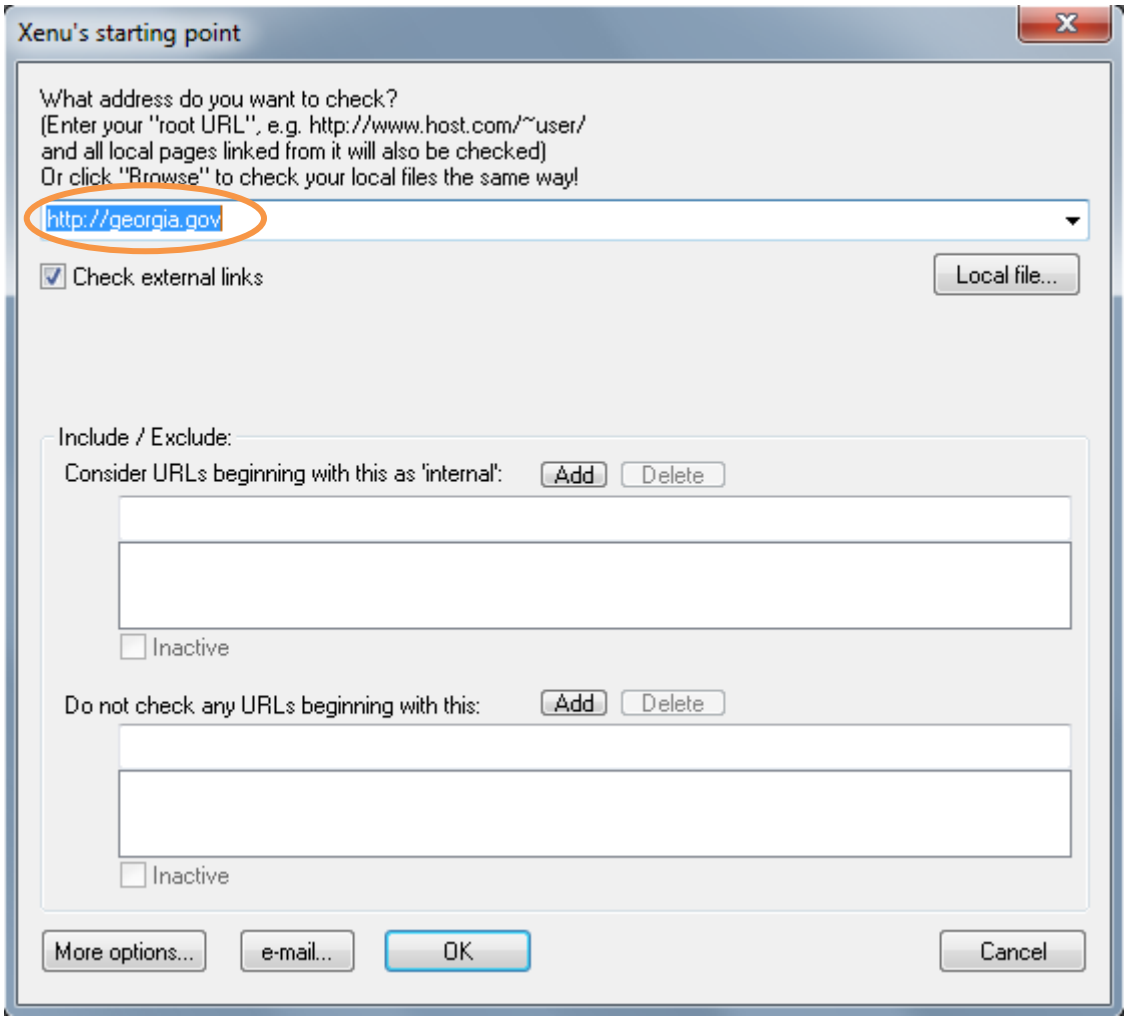


Figure 21 Entering a URL to check links in Xenu

3. If you want to check the status of all links on your site, check the box for *Check external links.* If you'd like to check your sites' internal links only, uncheck that same box. ***Note:*** *Running a comprehensive check of all links on your site could take some time but is an invaluable way to let you know if any links to external locations no longer work.*
4. Under **Include/Exclude**, add additions or exceptions to your URL check.
5. Press **Okay**.

Xenu will now start to look at the links on your site. Your status bar - on the lower right hand side of the window - will show the percent progress of the report. Be patient during this step. It could take upwards to 30 minutes for Xenu to scan the links if you have a large site.

After Xenu completes its scan, the program will ask you if you'd like a report. Unless you need to archive a copy of the links report, you can select **No**.

In the window, you can now review all of your site's links. By clicking **Status**, you can sort your links by those that are *OK* and those that are broken. Broken links display in red, so they're easy to spot.

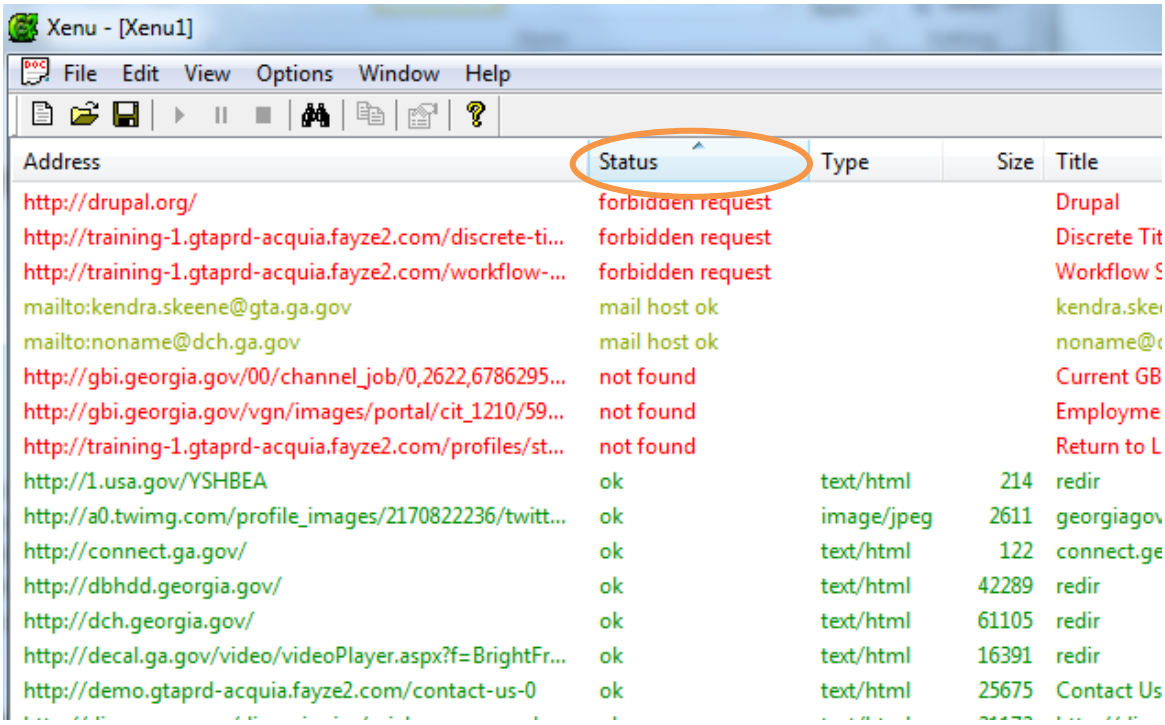


Figure 22 Sorting URLs by Status in Xenu

Once you find your broken links, you can start to fix them:

1. Right-click on the broken link.
2. From the dropdown, scroll down to **URL Properties**.
3. When you open **URL Properties**, look at the bottom of the pop-up window to see the box *Pages Linking to This One*. The pages listed here are those that reference the broken link.

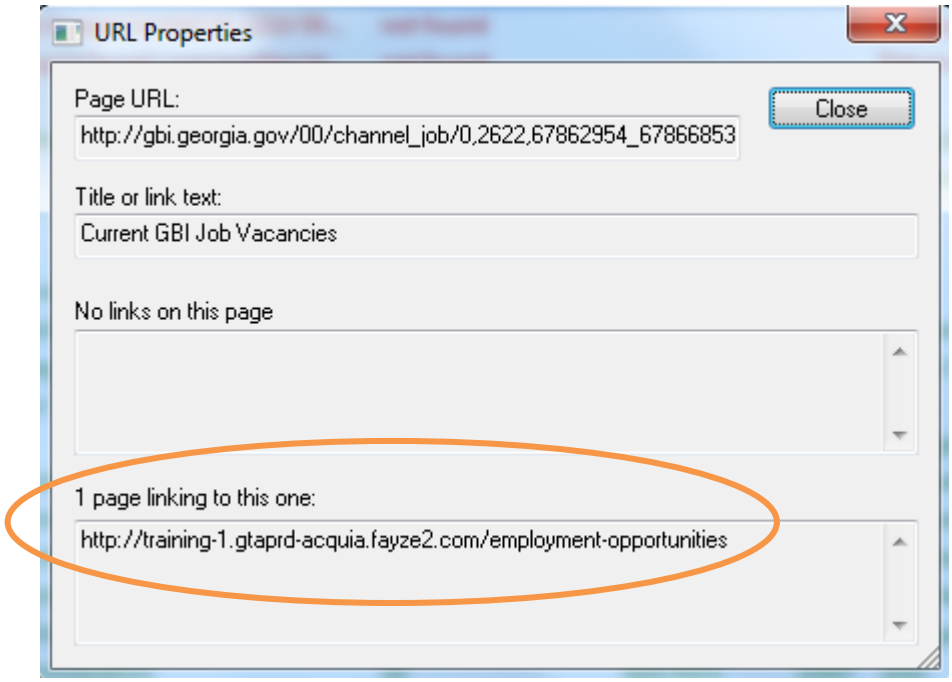


Figure 23 URL Properties

4. Copy the first URL listed under *Pages Linking to This One,* and paste it into your Web browser.
5. Now, looking back at your **URL Properties** pop-up window, look at the field labeled *Title or Link Text*. That's the broken link you'll need to fix.
6. Go back to your Web browser, and on that site page you just pulled up, find the broken link.
7. If you're not already signed into Drupal, log in, navigate to that page and replace the broken link with a working one. If you don't know of a working link, delete the broken link altogether.
8. After you've replaced or deleted the broken link from all pages formerly linking to it, you can close the **URL Properties** pop-up window.

You'll go through this process for each broken link on your site.

6.1 How Often Should I Check my Links?

The larger your site is, the more likely it is that links, both external and internal, will break. So, depending on how much or little content your offer, you may schedule your link checks as frequently as once a month or as infrequently as once every three months. At the very least, plan to run a report twice a year. Running these reports will keep your site healthy and indicate to your visitors that you care about their experience as they browse your site.