Portal Agency Training Manual

Advanced Editors Guide:

Exercises

Drupal 7 – GeorgiaGov Platform

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Support: For further assistance, fill out a Support Request on the home page of http://portal.georgia.gov

Contents

How to Use this Guide

These exercises are meant to be used during the Advanced Editor's Training session to give you hands-on experience with Drupal. Your instructor will provide you with the URL, username, and password for a training site you will use for these activities.

Naming: To be able to distinguish the files you're creating from the files of other students, you will be asked to append your initials to the end of the Titles of content you create. For example, John Doe (initials "JD") would name the Webform in Exercise 1: "Satisfaction Survey – JD."

Accessing Exercise Files

You will find one exercise file for this training session, at
portal.georgia.gov/interactive/advanced-training

Download the JPG file and save it to your Desktop in order to use it in the exercise below.

Exercise 1: Creating a Webform

For this exercise, you will use the Webform content type to create a Customer Satisfaction Survey. You want to collect the following details from people who fill out your form:

Customer's name – Textfield
Customer's email address – Email
Date of call – Date
Name of Representative – Select Options
Satisfaction Ratings – Grid
Comments – Textarea

1. To create a Webform, select **Add content** from the shortcuts menu bar.

2. From the list of content, select **Webform** from the list of content types.

3. In the **Title** field, title this page "Satisfaction Survey – [Your Initials*]"
   **see note in "How to Use this Guide" on exercise page titles*

4. In the **Body** field, type, "You recently made a call to our offices. Please tell us how it went."

5. **Click Save**.

6. You will now add Components, or fields, to your form.

7. To collect the Customer's name,

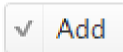
   a. Click in the field that says "New component name," and type "Your Name" into the field
   b. Select "Textfield" from the dropdown menu.
   c. Click Add 

   d. In the page that loads, you can add additional details to your form field. We don't need to add anything to this Textfield, so scroll down to click **Save Component**.

8. To collect the Customer's email address,
   a. Click in the field that says "New component name," and type "Your Email" into the field
   b. Select "Email" from the dropdown menu.
   c. Check the box in the **Mandatory** column to require that this field be filled out.
   d. Click Add 

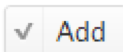
   e. In the page that loads, you can add additional details to your form field. We don't need to add anything to this Textfield, so scroll down to click **Save Component**.

9. To collect the Date of call,
   a. Click in the field that says "New component name," and type "Date of Call" into the field
   b. Select "Date" from the dropdown menu.
   c. Check the box in the **Mandatory** column to require that this field be filled out.

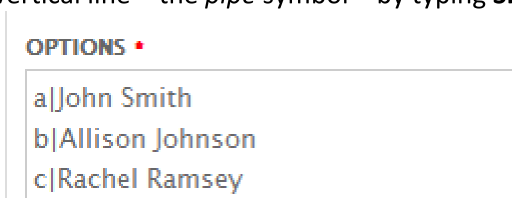
d. Click Add 

e. In the page that loads, you can add additional details to your form field.
   i. Under **Validation**, a user should only be able to select a date within the previous two weeks, and nothing in the future. Under **Start Date** type “-2 weeks.”
   Under **End Date** type “today.”

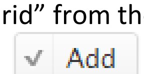
f. Scroll down to click **Save Component**.

10. To collect the name of the customer service rep the customer spoke with,
    a. Click in the field that says “New component name,” and type “Name of Representative”
    b. Select “Select Options” from the dropdown menu.
    c. Check the box in the **Mandatory** column to require that this field be filled out.
    d. Click Add 

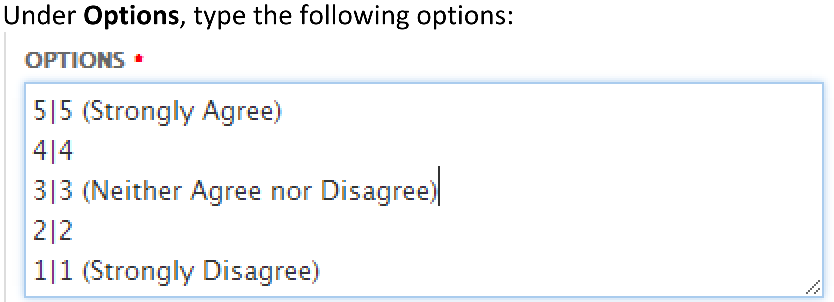
    e. In the page that loads, you can add additional details to your form field.
       i. Under **Options**, type the following to list the representatives (Note: you will find the vertical line – the *pipe* symbol – by typing **Shift** + the **** key)



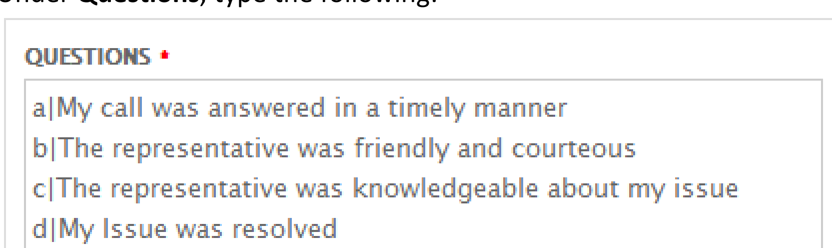
    f. Under **Display**, check “Listbox” to display the options in a drop-down list.
    g. Scroll down to click **Save Component**.

11. Now we want the user to rate their call, which we can do using a Grid component
    a. Click in the field that says “New component name,” and type “Rate Your Call?”
    b. Select “Grid” from the dropdown menu.
    c. Click Add 

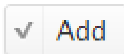
    d. In the page that loads, you can add additional details to your form field.
       i. Under **Options**, type the following options:



       ii. Under **Questions**, type the following:

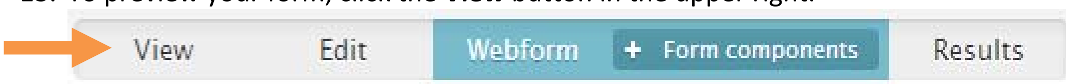


e. Scroll down to click **Save Component**.

12. Finally, we want the user to be able to add any other comments in a Textarea box, which is larger than a Textfield.
    a. Click in the field that says "New component name," and type "Comments"
    b. Select "Textarea" from the dropdown menu.
    c. Click Add 

    d. In the page that loads, scroll to the bottom and click **Save Component**.

13. To preview your form, click the **View** button in the upper right.



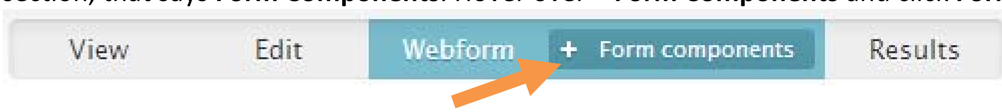
Exercise 2: Configuring Form Settings

For this exercise, you will configure the Webform Settings to send the results via email, test your form, and view the results in Drupal.

To configure what happens after a user submits your form, you will need to adjust the Webform Settings.

1. If you're Previewing your form, you will need to get back to the Webform backend. To do so, click the **Webform** button just above your page title.

2. When you're on the Webform screen, you will see an additional menu associated with the Webform section, that says **Form Components**. Hover over **+ Form Components** and click **Form Settings.**



3. When users submit forms, we want them to be sent to a Confirmation page that lets them know that the form has been submitted.
    a. In the **Confirmation Message** field, type:
    "Your survey results have been sent. Thank you for your feedback!"
    b. Scroll to the bottom, and click **Save Configuration**

4. Hover over the **+ Form Settings** button, and click **E-mails**. You want to receive an email with the form results each time a user submits the form.
    a. In the **Address** field, replace email@example.com with your email address, and click **Add**.
    b. On the page that appears, you can configure how the email looks when you receive it.
        i. Under **E-mail From Address**, change the radio button to **Component: Email**
        ii. Under **E-mail From Name**, change the radio button to **Component: Your Name**
    c. Click **Save E-mail Settings**

Exercise 3: Testing and Viewing Form Results

To test your form:

1. Click the **View** button, and fill out the form to confirm that everything works as expected.

2. If you have time, fill it out a second time with different responses.

Viewing Form Results

You should receive an email with the results of every form submission. You can also see the form results in Drupal. To see your Webform Results,

1. Click the **Results** button. You can click through individual form responses, or

2. Hover over the **+ Submissions** button and view the results in a different format.
    a. Choose **Table** to see a listing of all results,
    b. **Analysis** to see a count of the varied responses.
    c. You can also **Download** your results as an Excel file.

> ***Note:*** *If this were a real form, you would also want to enable a Captcha to prevent spambots from submitting to your form. This is a function that only a website Administrator from the GeorgiaGov team can add. To request a Captcha on a form,* ***submit a Support ticket*** *at* ***http://portal.georgia.gov*** *and include the URL of the new form.*

Exercise 4: Creating a Menu Item

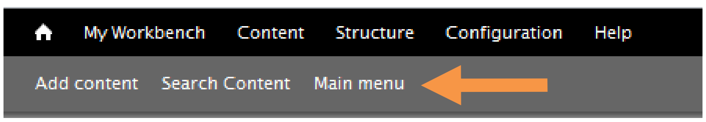
Now that you have finished setting up your form, you want to make it available to your users. The form is automatically **Published** when you first create it, but will only be available to people who know the URL. Once you're ready for people to use your form, you can link to it from anywhere.

1. To add the form to your main menu, click the **Edit** button.
2. Scroll down to **Menu Settings** and check **Provide a menu link**.
3. Change the **Parent Item** to "About Us" and click **Save**.

Exercise 5: Managing Menus

You can manage the position and titles of your Main Menu items from the Main Menu section.

1. Click **Main Menu** from the Shortcuts bar



2. To the right of the **Satisfaction Survey** line, click **Edit**
3. Change the **Menu Link Title** to "Satisfaction Survey" (remove your initials). This changes the Menu title, but does not change the title of the Webform itself.
4. Change the **Parent Link** to **Services**. This will move it to under the Services menu.
5. Click **Save.**
6. You will now find the Satisfaction Survey menu at the bottom of the list of links under Services. To move it above "Sub-Level1" in that list,
   a. Click and hold down on the anchor icon to the left of **Satisfaction Survey.**
   b. While holding your mouse button down, drag the menu item to above **Sub-Level1**
   c. Click **Save Configuration** at the bottom of the page to save your change.

NOTE: *The Main Menu is only designed to accommodate up to 7 menu items. You will need to keep your Main Menu set to 7 items or less, and structure the rest of your pages to be organized within those 7 items.*

Exercise 6: Updating the Homepage Rotator

Exercise Files:

- survey-rotator.jpg *(download at http://portal.georgia.gov/interactive/advanced-training)*

You can edit the content of a Rotator (or any other manually curated content box) on your homepage at any time.

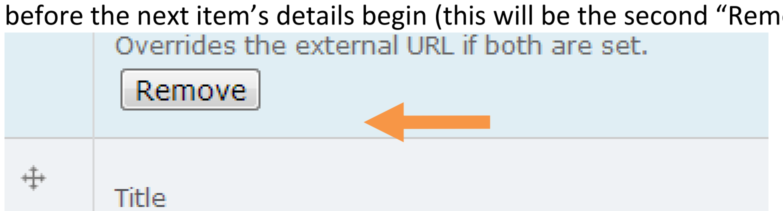
1. Go the homepage, and find the rotator.

2. Hover your mouse over the content area.

   a. Select the small gear icon  that appears in the upper right hand corner of the content area, and then click on "Edit Box" in the dropdown that appears.

3. An "Edit Box" dialogue will appear, showing you the options for the rotator. Each slide in the rotator has a set of information that needs to be added to it. You will be deleting one slide, and adding a new one.

4. To delete a rotator item, scroll to the bottom of that item's details, and click the **Remove** button just before the next item's details begin (this will be the second "Remove" button for that item).



5. Once the item has been removed, scroll down until you see a blank Rotator listing.
   a. In the **Title** field, type "Take Our Satisfaction Survey"

   b. In the **Description** field, type "Have you spoken with one of our Customer Service representatives? Take our Satisfaction Survey now!"

c. Under the **Image** label, click **Choose File**. Navigate to your Exercise Files (most likely on your Desktop), select the "survey-rotator.jpg" image, and click **Open.**

d. In the **Alternate Text** field, type "Sharpie marker checking a survey checkbox."

e. In the **Node Reference** field, begin to type "Survey" and select your "Satisfaction Survey" title from the list.

f. To **move** this item to the first position, click the Anchor handle  to the left of the Title, and drag it above the other rotator items.

g. Click **Save**.

You have now deleted one Rotator item, and added a new one.