

**Portal Agency Training Manual**

**Editors Guide:**

# **Exercises**

**Drupal 7 – GeorgiaGov Platform**

---

**Prepared By:** GeorgiaGov Interactive

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

## Contents

Portal Agency Training Manual .....	1
Editors Guide: Exercises .....	1
<b>Drupal 7 – GeorgiaGov Platform</b> .....	1
Contents .....	2
How to Use this Guide .....	2
Accessing Exercise Files.....	2
Exercise 1:    Creating a Site Page .....	3
Exercise 2:    Adding Attachments to your Content .....	5
Exercise 3:    Posting an Event.....	7
Exercise 4:    Creating a Press Release .....	8
Exercise 5:    Creating an Index List .....	9
Exercise 6:    Moderating Content.....	11
Additional Practice – Exercise 7:    Creating a Document page .....	13

## How to Use this Guide

These exercises are meant to be used during the 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 Site Page in Exercise 1: “About DCH – JD.”

## Accessing Exercise Files

You will find all the exercise files for this training session at  
**[portal.georgia.gov/interactive/editors-training](http://portal.georgia.gov/interactive/editors-training)**

Download the Zip file, and unzip it to your Desktop in order to use these files in the exercises below.

## Exercise 1: Creating a Site Page

A Site Page is designed to display static, informational content on your website.

### Exercise Files:

- About DCH.doc
- DCH\_Overview\_FY12.pdf




1. To create a Site Page, select **Add content** from the shortcuts menu bar.
2. From the list of content, select **Site Page** from the list of content types.
3. In the **Title** field, title this page “About DCH – [Your Initials\*]”  
*\*see note in “How to Use this Guide” on exercise page titles*
4. In the **Body** field, you will paste the contents of the **About DCH.doc** file.
  - a. Open the Exercise File, **About DCH.doc**. Select the contents of this Word document, and copy it.
  - b. Return to the browser window with the Create Site Page screen open. Click in the Body field, and Paste the content you copied.
  - c. The contents will appear, with some formatting removed, into the Body field.
5. Next, you need to fix and add some formatting to the Body content.
  - a. Scroll to the end of the Body area, where you see the bullet list of **Core Organizational Values**. Depending on the web browser you’re using, the bullet list may or may not have moved over with the proper formatting.



#### Improperly formatted bullets

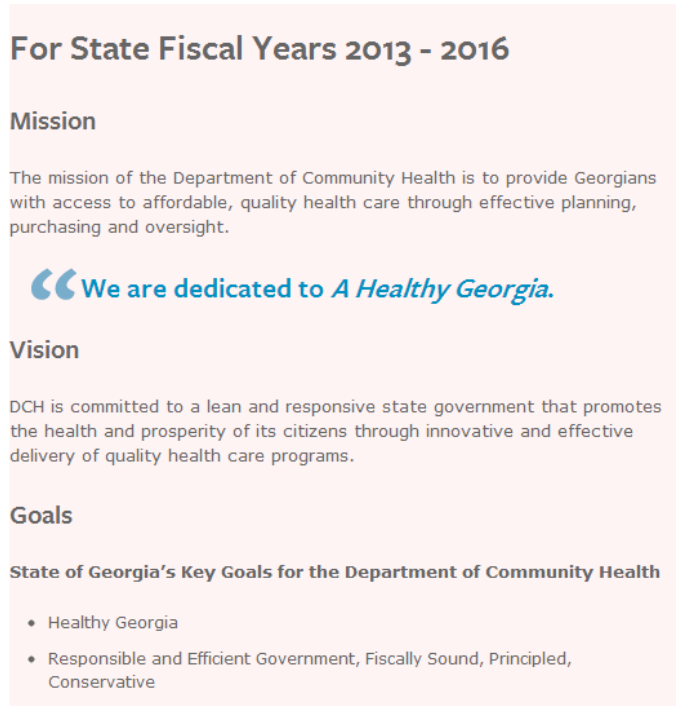
- Accessible and Affordable Health Care
- Program Integrity/Ethics


#### Properly formatted bullets

- Accessible and Affordable Health Care
- Program Integrity/Ethics
- Fiscal Responsibility and Efficiency

- b. If your bullets are improperly formatted, highlight the bullets, and click the  bullet icon to add in proper bullets. Then you will need to delete the small character bullets and extra spacing from the beginning of each bullet item.
  - c. Scroll up to the list of **State of Georgia’s Key Goals for the Department of Community Health**. These goals should be bulleted. Highlight the two goals below the heading, and click the  bullet icon.
  - d. Repeat these steps for the list of Goals under the heading, **Department of Community Health’s Key Goals**.
6. You also want to link to one of the services you mention in the Body text. Scroll to the top of the Body content, and look for the term **State Health Benefit Plan (SHBP)**. To link this text to a description of the service:
    - a. highlight the text “State Health Benefit Plan (SHBP)” and click the  **hyperlink** icon.

- b. In the field that appears, type <http://dch.georgia.gov/wellness> into the **URL** field.
  - c. Click OK.
7. Right now, the subheadings for Mission, Vision, and Goals are in the normal font size, with bold and italic formatting. You would like these to stand out as subheadings.
  - a. Highlight the word “Mission” and click the  **B** **I** **U** **Bold** and **Italic** icons to turn off that formatting.
  - b. Click on the word “Normal” in the styles dropdown list, and choose **Heading 3**.
  - c. Repeat these steps for the Vision and Goals subheadings.
8. You want the tagline to stand out, so you will set it up in block quotes. Block quotes have a very bold formatting, so you should use them sparingly.
  - a. Scroll to find the line “We are dedicated to a Healthy Georgia,” and click your cursor somewhere on that line.
  - b. Click the  **block quote** icon. The text will indent, but here you will not see much additional formatting. The block quote formatting will show when you save your page.



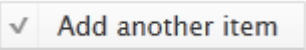
9. Add links to keywords in your text by highlighting the text and using the  Insert/Edit link icon.
  - a. Highlight “The Mission” text to add a hyperlink and click the Link icon. A pop-up box will appear.
  - b. From the Link Type dropdown box, you can choose to link to an external URL, an internal Anchor, or an Email address.
  - c. Fill out the field that says URL with [dch.georgia.gov/about-us](http://dch.georgia.gov/about-us) click **OK**.

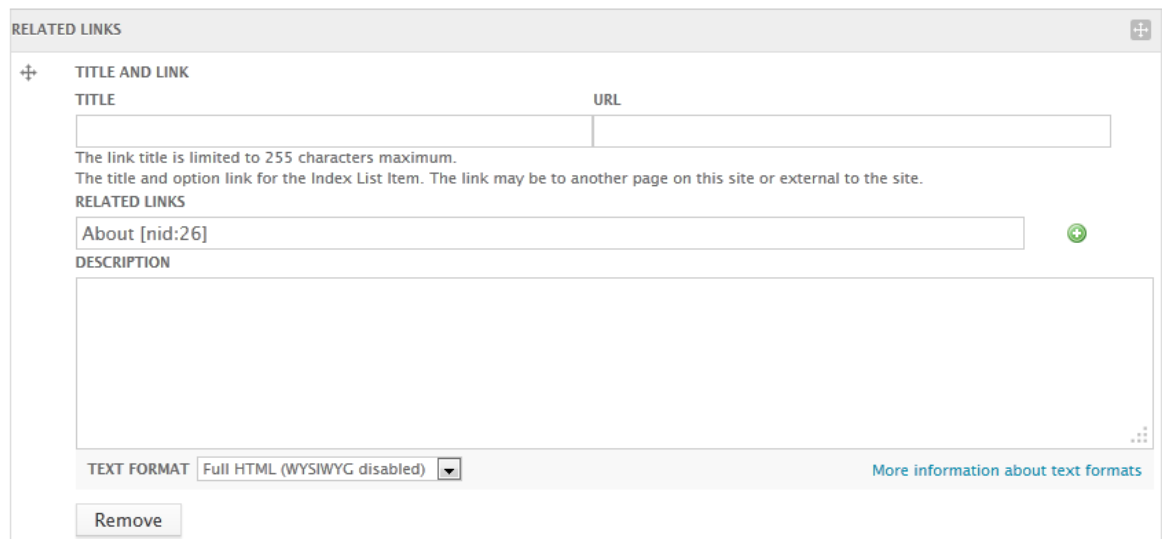
10. Now, you want to save your work to preview the formatting thus far.  
**Click Save.**

You will see the page as it will appear on the live site. A faint pink background indicates that this is a Draft, not a

published version.

## Exercise 2: Adding Attachments to your Content

1. You need to add some related information at the end of the site page, so you need to edit the Site Page. Click the **Edit Draft** button above the title.
2. You want to link to some related pages, and upload a related file. Related Links will appear below your Body section, but they do not natively have a heading associated with them. You want to add a heading called “Related Links.”
  - a. Scroll to the bottom of the Body section and place your cursor in a new line below the existing body text. Type “**Related Links:**” on a new line
  - b. With your cursor on that line, click on the formatting dropdown box (currently set to “Normal”) and select “Heading 2”
3. Scroll to the **Related Links** section. Here you can add links to content in the system or anything on the internet.
  - a. For the first Related Link, click in the **Title** field and type “Department of Community Health.”
  - b. In the **URL** field, type “dch.georgia.gov”
  - c. In the **Description** field, type “Visit the DCH website for more information and resources.”
  - d. Click  to create another Related Link.



RELATED LINKS

TITLE AND LINK	URL
<input type="text" value="About [nid:26]"/>	<input type="text"/>

The link title is limited to 255 characters maximum.  
The title and option link for the Index List Item. The link may be to another page on this site or external to the site.

RELATED LINKS

DESCRIPTION

TEXT FORMAT: Full HTML (WYSIWYG disabled)

[More information about text formats](#)

Remove

- e. This time, you will link to a page on your website. To link directly to an existing site page, click in the **Related Links** field and start to type the name of a page.
- f. Type “About” and select the “About” page from the list that appears.
- g. In the **Description** field, type “Learn more about our agency.”

4. Now scroll to the **Related Files** section. These are used to attach files, such as PDFs, specifically to this piece of content. The files will appear at the very bottom of the page as a special download.

Figure 1 Related Files with an item added

- a. To add a file, select the **Browse** button (depending on your web browser, the button may say **Choose File**), and use your system's file browser to find an item. Find the file **DCH\_Overview\_FY12.pdf**
- b. Select **Upload**.
- c. In the **Description** field, type the Name as you want it to appear on the page. For this file, type "**DCH Overview FY12**" into the Description field (if you enter nothing, the filename will be used).

**Note:** If you upload a file with the same filename as an existing file on the system, this one will overwrite the other file. For example, if there is already a PDF titled "Application-form.pdf", and you upload a revised PDF titled "Application-form.pdf" in the same folder, the new PDF will replace the old one, as it would on your computer's hard drive.

5. We want this About page to show up in the navigation menu.
  - a. Scroll to the bottom of the page, and under Menu Settings, check **Provide a menu link**.
  - b. In the **Parent Item** dropdown menu, select About Us to nest this page under the main **About Us** menu.

6. Click **Save**. Now the About Us left-hand menu appears on the page. This page title is NOT in the menu yet, because the page is not published.
7. Scroll to the bottom of the page to see how the Related File(s) appear.
8. You're happy with how this page looks, so you can Publish it.
  - a. Scroll back to the top of the page, and in the yellow box, set the moderation state to **Published**, and click **Apply**.

9. You have published your Site Page, and the menu item can now be found under the About Us menu.

### Exercise 3: Posting an Event

Events are automatically posted to an /events page on your website, and will show in chronological order (with Past Events linked at the bottom of the page). You can also place a Box on your homepage to feature Upcoming Events.

1. To create a new Event, select **Add content** from the shortcuts menu bar.
2. From the list of content, select **Event** from the list of content types.
3. **Title:** Board Meeting – [Your Initials\*]
4. In the **Description** field, type the following (below):

**Agenda:**

- Call to Order
- Opening Comments
- Commissioner's Report
- New Business
- Adjourn

The meeting will begin promptly at 7pm.  
Please plan to arrive on time.

***\*Note:** To insert a line break in the Description field after "7pm."*

hold down **[Shift]** and press **[Enter]**.

5. Under **Event Date**, check **Show End Date**.
  - Click in the first **Date** field to select a Start Date of next Tuesday.
  - Type in a start **Time** of **07:00pm**
  - In the second **Date** field, select the same date as the Start Date.
  - In the second Time field, type **09:00pm**

**Event Date**  
☐ All Day ☒ Show End Date  

DATE	TIME
07/16/2013	07:00pm

**TO:**  

DATE	TIME
07/16/2013	09:00pm

6. Under **Location**, add the following address:  
2 Peachtree Street, NW  
5<sup>th</sup> Floor Board Room  
Atlanta, GA 30303

7. Scroll to the bottom and click **Save**. You will see a preview of your Event.

- Set the moderation state to **Needs Review**, and click Apply. Now this Event is in the queue of content for an Editor’s review.

## Exercise 4: Creating a Press Release

All Press Releases will show on a special Press Releases page, ordered by date, as well as the Latest box on your homepage. All Press items are also added to your site’s RSS feed, which individual users can subscribe to, and Georgia.Gov can use to aggregate your press releases.

### Exercise Files:

- press-release.doc

- To create a new Press Release, select **Add content** from the shortcuts menu bar.
- From the list of content, select **Press Release** from the list of content types.
- Open the Exercise File: **press-release.doc**.
- Copy and paste the Title of the press release into the **Title** field, and add your initials to the end.
- Select and copy the text of the release – starting at “ATLANTA” and ending at [www.dch.georgia.gov](http://www.dch.georgia.gov).
- Paste the release text into the **Body** field.
- By default, a portion of the beginning of the press release will appear on the Press page as a Summary. You can also control what shows in the Summary field by adding it in yourself.
  - Above the body field, click the “**Edit Summary**” link. **BODY (EDIT SUMMARY)**
  - In the Summary field that appears, paste in the bold sentence that appears on the Press Release before “ATLANTA.”

**SUMMARY (HIDE SUMMARY)**

**New portal will provide year-round 24/7 access to conveniently serve all SHBP members**
- Scroll down to the **Release Date**, and type **06/25/2013** into the field.
- In the **Contact Information** field, type “Pamela A. Keene”
- In the **Categories** field, type Health, and then select “State Health Benefit Plan” from the list that appears.
- Click **Save** to preview your release.

CATEGORIES
Health
Social Services
Health
Consumer Health
Behavioral Health
Health Care (Health Insurance)
State Health Benefit Plan

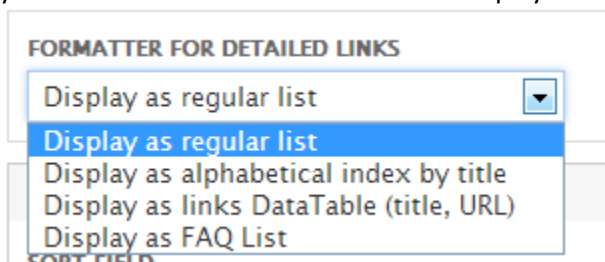


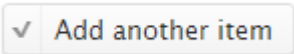
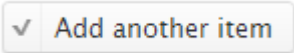
12. Set the moderation state to **Needs Review**, and click Apply. Now this Press Release is in the queue of content for an Editor's review.


## Exercise 5: Creating an Index List

An Index List is very similar to a Site Page, but the focus is on creating a list of links with additional methods for formatting or organizing that list. Index Lists can be formatted as a Regular List, an Alphabetical Index, or an FAQ page. In this exercise, we will create a Regular List. *(For instructions on creating an FAQ list, see the Video Demos at <http://portal.georgia.gov/interactive/training-demos>).*

1. To create a new Index List, select **Add content** from the shortcuts menu bar.
2. From the list of content, select **Index List** from the list of content types.
3. **Title:** Medicaid Resources – [Your Initials]
4. Scroll down to the **Formatter for Detailed Links** box. This is where you can change the formatting of your list if needed. We will leave it at "Display as regular list."



5. Scroll to the **Detailed Links** section. As you've seen in other content types, you can add links by listing its Title and URL for external links, or by typing the name of a content item in the Related Links section for internal links.
  - a. In the first **Title** field, type "Georgia Families"
  - b. **URL:** [dch.georgia.gov/georgia-families](http://dch.georgia.gov/georgia-families)
  - c. **Description:** Georgia Families delivers health care services to members of Medicaid and PeachCare for Kids.
6. Click  to create another Detailed Link. In the next field:
  - a. **Title:** Medicaid Waivers
  - b. **URL:** [dch.georgia.gov/waivers](http://dch.georgia.gov/waivers)
  - c. **Description:** Waiver programs help people who are elderly or have disabilities and need help to live in their home or community.
7. Click  to create another Detailed Link. In the next field, skip the Title and URL. In the **Related Links** field, begin to type "Certificate of Need" and select the **Certificate of Need – Fact Sheet** that you created in a previous exercise.

- a. We want the title to appear differently. In the **Title** field, type, “Medicaid Certificate of Need” to change how the title will appear on the page.
  - b. **Description:** This test content doesn’t really have anything to do with Medicaid.
8. If you want to reorder your links, you can manually click and drag them by their anchor  buttons. Or you can scroll back up to the **Sort Items** section. To reorder the links alphabetically by Title:
  - a. Change the **Sort** drop down field to “Title and Link”

Sort Items

**SORT FIELD**

Title and Link ▼

**COMPARISON TYPE**

String ▼

**SORT DIRECTION**

desc ▼

Sort

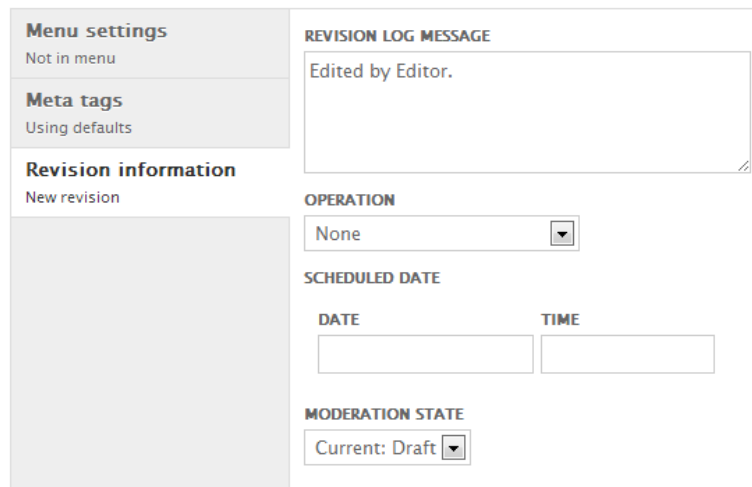
- b. Click “Sort”
    - c. The order of items below will be alphabetized by Title and Link.
9. Scroll to the bottom of the page and click **Save** to save a draft and preview your work.

## Exercise 6: Moderating Content

As an Editor, you can Publish content immediately, schedule content to publish or unpublish at a later date, and Unpublish content. You also have access to the Needs Review panel on your Workbench, where you can Publish others' content that is set to Needs Review status. In this exercise, you will explore those options.

### Scheduling Content

1. If you're not already looking at your "Medicaid Resources" Index list, use Search Content to find that page and view it. Right now that page is in Draft mode. We want this item to publish tomorrow morning.
  - a. Click **Edit Draft**, and scroll down to the bottom of the Edit Screen.
  - b. The bottom of the screen, click Revision Information. You will see the following box:

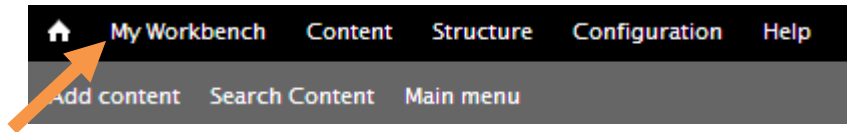


The screenshot shows a sidebar on the left with three sections: 'Menu settings' (Not in menu), 'Meta tags' (Using defaults), and 'Revision information' (New revision). The main area on the right is titled 'REVISION LOG MESSAGE' and contains a text box with 'Edited by Editor.' Below this is the 'OPERATION' section with a dropdown menu set to 'None'. The 'SCHEDULED DATE' section has two input fields: 'DATE' and 'TIME'. The 'MODERATION STATE' section has a dropdown menu set to 'Current: Draft'.

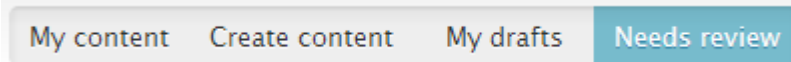
- c. Under **Operation**, choose **Moderate to Published**
    - d. Under **Scheduled Date**, click in the **Date** field and choose tomorrow's date from the Date Picker that appears.
    - e. Click in the **Time** field, and type 8:30 to indicate that the item should publish at 9am tomorrow. (Note: this field uses military time. If the content should publish at 1pm, you would type 13:00).
    - f. Click **Save**.
2. Scheduled operations run during your website's hourly Cron tasks. Your item will publish within an hour of the scheduled time. In this instance, it will publish sometime between 8:30am and 9:30am tomorrow.

## Workbench Content

1. Make a habit of reviewing content from content Creators once a day, and Publishing that content if you decide it's written appropriately. To get started, click **My Workbench**.



2. On the Workbench screen, click the **Needs Review** button to the far right.

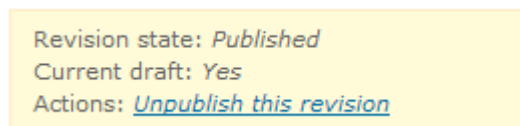


3. This Needs Review screen shows all the content that's ready for your review. Click the Title of the **Board Meeting** event.
  - a. In the yellow box, change the Moderation State to **Published** and click **Apply**.
4. To return to the Needs Review screen, click **My Workbench**, then **Needs Review**. Find the Press Release you created earlier. You've already reviewed this one, so now you just want to Publish it.
  - a. Click the "**Change to Published**" link to the left of the title to automatically publish this item.

## Unpublish (Archive) Content

If you want to remove content from your site, but still want to be able to find it from Search Content in the future while you're logged in, you can Unpublish, or Archive that content. We are going to Unpublish the About Us document you created today.

1. Click Search Content, and look through the list for the **About DCH** page you created. Click the page Title to view it.
2. The yellow Workbench box on this page tells you that the page is **Published**. Click "**Unpublish this revision**".



3. On the next page, click the **Unpublish** button. You have just Archived this content item.

## Delete Content

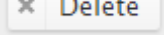
When you want to remove content entirely from the system, you can choose to Delete it. In this exercise, we're going to delete all the content items you created in today's exercises.

1. Click **Search Content**. On the Search and Filter bar,
  - a. Set Current Revision to **Yes**,
  - b. Type YOUR INITIALS into the "Title Contains" field, and
  - c. Click **Apply**.

Current revision	Title contains	Node type	Promoted	Moderation status	Body contains	Apply
- Any -	KS	- Any -	- Any -	- Any -		

2. Only the content you created (with your initials in the title) should be visible on the page. Each item will have an **edit** and a **delete** link associated with it.
  - a. Click the **delete** link associated with your Board Meeting content item .

Board Meeting- KS	Event	admin	edit	delete	Published
-------------------	-------	-------	------	--------	-----------

- b. On the next screen, click  to completely delete this content item.
- c. Repeat steps **a** and **b** above to delete the other content items you created.

## Additional Practice – Exercise 7: Creating a Document page

A Document is designed to present one or more file attachments – typically PDFs. These Documents can be added as menu items on the main menu, and they will all show on a special documents page, where they can be filtered by type.

### Exercise Files:

- FY13\_Fact\_Sheet-Certificate\_Of\_Need.pdf
- Complaint\_Form.pdf

1. To create a new Document, select **Add content** from the shortcuts menu bar.
2. From the list of content, select **Document** from the list of content types.

3. In the **Title** field, title this page “Certificate of Need Fact Sheet – [Your Initials\*]”  
*\*see note in “How to Use this Guide” on exercise page titles*
4. In the **Description** field, you will type in a description of the Document. Type the following description:  
  
“This Fact Sheet covers the details for submitting a Certificate of Need (CON).”  
  
*Note that the Description field is in Plain Text formatting by default. If you need more than one paragraph or other formatting in this field, you will need to change the Text Format to “Full HTML.”*
5. This document dates from July 2013, so in the **Publication Date** field, input **07/01/2013**.  
*Note: if no date is associated with this document, delete the contents of the field.*
6. In the **Document Type** drop-down, select **Publication**. This will categorize the Fact Sheet as a Publication on the Documents page.
7. In the **Attachments** field, you will attach your file(s).
  - a. Click **Browse**, and find the file **FY13\_Fact\_Sheet-Certificate\_Of\_Need.pdf**
  - b. Click **Upload**. The file will upload and the Description field will appear. Type “Certificate of Need Fact Sheet – FY13”
  - c. If you needed to attach another file to this Document, you could do so from the Browse button below. For this document, we only need one file.
8. Click **Save** to save your Draft.
9. Set the Moderation State to **Published**, and click **Apply**. You have now published one Document.

### **Apply Your Knowledge:**

Using the same steps you followed in Exercise 3, create and publish a new Document content item with the following parameters:

- **Title:** Dentistry Complaint Form
  - **Document Type:** Form
  - **Attachment:** Complaint\_Form.pdf
10. Now that you’ve added two Documents, navigate to the Documents page from the menu. You will see all the documents listed. To just see the Form you uploaded, click **Form** in the **Document Types** box to the right.  
*Note: If your agency would like to add new Document Types to the list, a Taxonomy Manager from your agency can do so. Instructions are covered in the Advanced class.*