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Advanced Editor's Guide

Drupal 7, GeorgiaGov Platform

Prepared by: Digital Services Georgia

Support: For further assistance, visit **our support page** (digitalservices.georgia.gov/support)

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1.   Review

1.1.   Terminology

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

Alternative (or Alternate) Text
A text description for an image. Search engines and screen readers present alternative text for site visitors who have visual disabilities.

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 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 refer to content items as **nodes**.

Content Type
The formatting a content item uses. Examples include Blog Entries, Photo Galleries, Site Pages, and Press Releases. Each of these comes with structuring specific to that type of content.

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 relative URL is a partial web path and points to specific content on your site, e.g. /education

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

2.   Webforms

When you need to collect information or feedback from 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 several 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.

2.1.   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) 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.

6) When you're done, **Save** the beginning of your form.

Note: The fields for **Secure with SSL** and **Access Restrictions** are only needed for Secure Webforms. **Secure Webforms** allow you to create a forced HTTPS Webform for secure communication and submissions through your website. Submissions through the secured Webform are stored in a way that only authorized and authenticated users can view the results. For more information and training materials on how to use Secure Webforms, ask your GTA Web Account Manager.

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2.1.1. Understanding Components

Now you will add **Components** to your new form. Components create the interactive fields that allow visitors to submit their responses. You can collect data in the following formats using Webforms:

Component	Purpose
Date	Select a date by Month, Day, and Year format, or using a pop-up calendar.
Email	Requires a response in e-mail address format.
Fieldset	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. (This field's function is very specific, and it's unlikely that you'll need to use it. To learn more about Hidden fields, visit Drupal.org.)
Markup	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.

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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.

Figure 1 Form Components

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.

2.1.1.1.   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** – Chose whether you'd like the data to reference the *User's* timezone, or the *Website's* timezone
- **Validation**
  - Check **Mandatory** to make this field mandatory.
  - Set a **Start** and **End date**. By default, the start date can fall up to 2 years before the date of the Webform submission, and it can extend up to two years after the Webform submission. You can change these parameters to best suit your needs.
- **Display**
  - Check if you want to **Enable popup calendar** to display, or if you want to **Use a textfield for year**.

Figure 2 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. (We recommend just leaving that box unchecked.)

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

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2.1.1.2.   E-mail

Mandatory fields:

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

Optional fields:

- **User email as default** – check to prepopulate the field with the email address of a person logged into the system (typically not needed – leave this unchecked).
- **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 **Mandatory** to make this field mandatory.
  - Check **Unique** to make sure no one has entered that email address into this form before. (Useful if you want to ensure that each person only fills out a form once.)
- **Display**
  - **Width** is not used. (overridden by theme styles)
  - **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. (We recommend just leaving that box unchecked.)

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

2.1.1.3.   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.
- **Display**
  - Check to make the fieldset **Collapsible** or **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, 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. (We recommend just leaving that box unchecked.)

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

After saving, you'll return to the main Webform page. To move components, click and hold on the *handle* to the left of the component name; now drag-and-drop those components into your new fieldset (nested components will be indented under the fieldset).

⊹	Complaint Information	Fieldset	-		Edit	Clone	Delete
⊹	Incident Date	Date	-	☐	Edit	Clone	Delete
⊹	Time of Submission	Time	-	☐	Edit	Clone	Delete
⊹	Your Thoughts	Textarea	-	☐	Edit	Clone	Delete
⊹	Description of Incidence	File	-	☐	Edit	Clone	Delete

Figure 3 Components nested under a fieldset

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2.1.1.4.   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.
- Choose whether the **Upload destination** will be *Public* or *Private*
    - Set as **Public files** for JPG, GIF, TIFF, PNG, or PDF file types only. All other file types must be set to **Private**.
    - If a Webform accepts file uploads to a **Public** file storage, an anonymous user can upload a malicious file and then go directly to that file storage URL to access it and run malicious code. The form does not have to be submitted. As soon as it is uploaded, it is available.
    - When files are uploaded to **Private** file storage, the form recipient will need to log into Drupal to access the file(s).
- 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. (Be sure to follow standard web folder naming conventions and do not include spaces or special characters in your directory name.)

Upload directory

webform/ | test-directory

Figure 4 Upload Directory with new directory added

- **Validation**
  - Check **Mandatory** to make this field mandatory.
  - You can define a **Maximum upload size**
  - You can define specific **Allowed file extensions**

Figure 5 Validation options

- **Display**
  - **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.
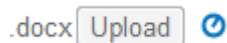

Figure 6 Throbber indicator   **Figure 7** Bar with progress meter

- **Private** – checking this box limits who from your agency can see the results from that field.
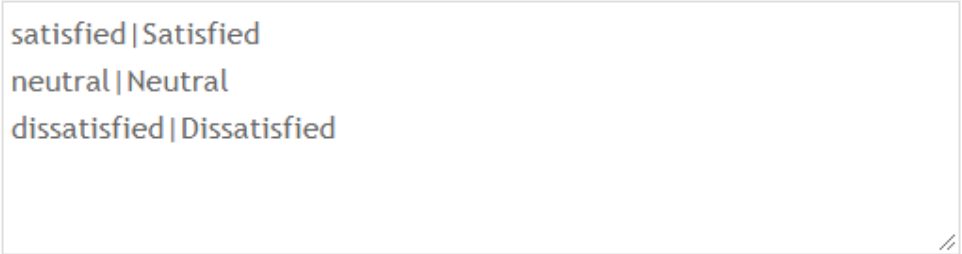
When you've finished filling out the form, click **Save**.

2.1.1.5.   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:

Options (required)
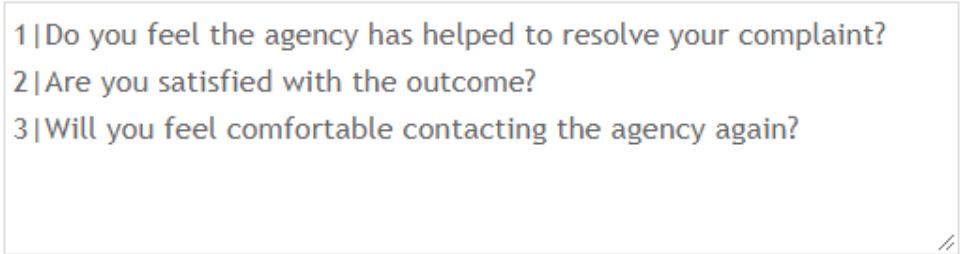
satisfied|Satisfied
neutral|Neutral
dissatisfied|Dissatisfied

Figure 8 Grid Options field

Note: To type in a vertical bar on a PC, 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:

Questions (required)

1|Do you feel the agency has helped to resolve your complaint?
2|Are you satisfied with the outcome?
3|Will you feel comfortable contacting the agency again?

Figure 9 Grid Questions field

Optional fields:

- **Description** – help text that will show beneath the field to guide respondents as they answer.
- **Validation**
  - Check **Mandatory** to make this field mandatory.
- **Display**
  - If you'd like to put the options in a random order, check **Randomize Options**
  - If you'd like to put the questions in a random order, check **Randomize Questions**
  - If you don't want the field label to display, check **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. (We recommend just leaving that box unchecked.)

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

	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 10 Grid component

2.1.1.6.   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.
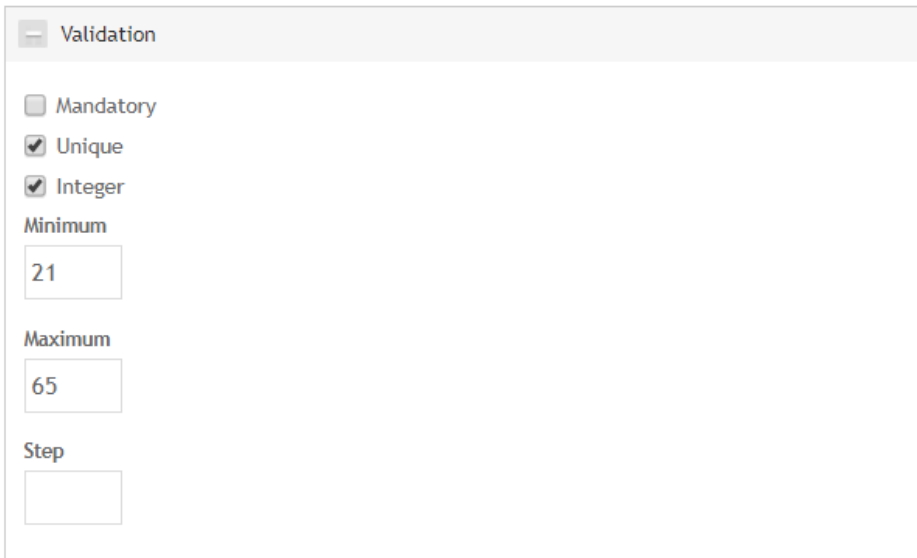
When you've finished filling out the form, **Save**.

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2.1.1.7.   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 **Mandatory** to make this field mandatory.
  - Check **Unique** so that the same value cannot be used by any other respondents.
  - You can determine whether you'd like your respondents to type in only **Integers**
  - Set a **Minimum** and **Maximum** 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.

Figure 11 Sample Number Validation fields

- 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**.

- **Display**
    - Choose whether you'd like to collect information from a **Text field** or from a **Select list**.
    - You can add text **Labels** to the *Left* or *Right* of the textfield, if necessary.
    - Determine how many **Decimal places** you'll accept
    - 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.
    - To prevent respondents from entering text into the field, check to **Disable** the field. (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. (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**.

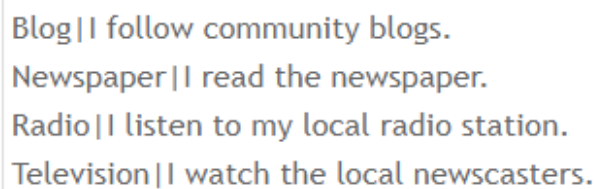**Digital Services**
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2.1.1.8.   Page Break

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**.

2.1.1.9.   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 (required)

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

Figure 12 Select Options "Options" field

> **Note:** To type in a vertical bar on a PC, 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.
- **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. (All *single* options will by default display as radio buttons, not checkboxes.)
- You can also choose to **Load a pre-built option list** for:
  - Countries
  - Days of the week
  - U.S. states
- **Validation**
  - Check **Mandatory** to make this field mandatory.

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- **Display**
    - o Check **Listbox** if you'd like the options to show in a dropdown selector.
    - o If you'd like to put the options in a random order, check **Randomize Options**
    - o **Label Display** – can be set to *None* from the label display dropdown if you don't want the label to show.
    - o **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. (We recommend just leaving that box unchecked.)

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

2.1.1.9.1.   Select Options Possible Displays

I follow community blogs.

I read the newspaper.

I listen to my local radio station.

I watch the local newscasters.

Figure 13 *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.

Figure 15 *Listbox* checked; *Multiple* checked

I follow community blogs.

I read the newspaper.

I listen to my local radio station.

I watch the local newscasters.

Figure 14 *Listbox* not checked; *Multiple* not checked

I follow community blogs.

Figure 16 *Listbox* checked; *Multiple* not checked

2.1.1.10.   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 **Mandatory** to make this field mandatory.
- **Display**
  - **Width** is not used. (overridden by theme styles)
  - **Height** is not used. (overridden by theme styles)
  - **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. (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. (We recommend just leaving that box unchecked.)

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

2.1.1.11.   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 **Mandatory** to make this field mandatory.
  - Check **Unique** 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.
- **Display**
  - **Width** is not used. (overridden by theme styles)
  - You can add text **Labels** to the *Left* or *Right* of the textfield, if necessary.
  - **Label Display** can be set to *None* from the dropdown if you don't want the label to show.
  - To prevent respondents from entering text into the field, check to **Disable** the field. (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. (We recommend just leaving that box unchecked.)

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

2.1.1.12. 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 whether you'd like the data to reference the *User's* timezone, or the *Website's* timezone
- **Validation**
  - Check **Mandatory** to make this field mandatory.
- **Display**
  - **Time Format** – select whether you'd like your time field to display standard *12-hour* (AM and PM) or *24-hour* military time.
  - **Minute increments** — Select what increments you want the minute dropdown to offer
  - **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. (We recommend just leaving that box unchecked.)

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

2.2. Apply Your Knowledge: Exercises

Complete **Exercise 1** in your **Advanced Editor's Guide: Exercises** manual (digitalservices.georgia.gov/advanced-training).

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2.3.   Completing the Webform Setup

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 side of the component's title.

Figure 17 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*, *Form Settings*, and *Generate PDF*.
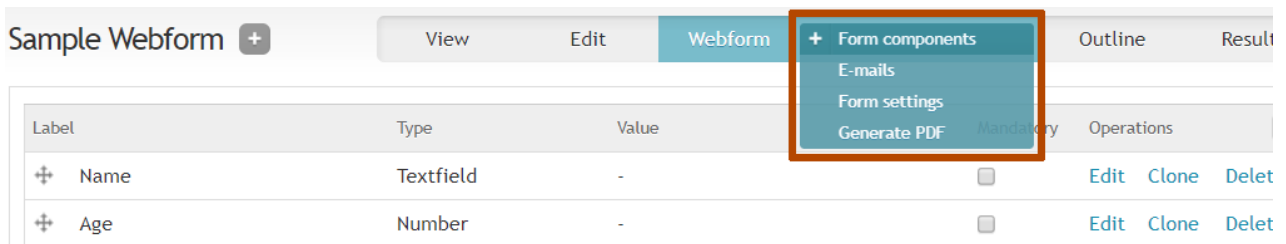

Figure 18 Accessing Form Components

4) First, click on **Form Settings**.

    a. **Submission settings**

        i. **Confirmation Message** - type in the text that should display once a respondent has submitted the form.

        ii. **Redirection Location** — 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* and paste the destination URL. (We recommend including a confirmation message; some respondents may not think their forms have been delivered unless they read a confirmation.)

        iii. 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.

        iv. Set a **Per user submission limit** only if you want to receive a limited number of forms from each person.

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> v. 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*.

b. Under **Submission Access**, *do not make any changes*. (Drupal considers your site visitors to be *anonymous users*.)

c. Click the **Advanced Settings** header to see more settings

> i. **Available as a block** — This will let your Webform to show on your homepage or landing pages. (Contact **Digital Services Georgia support** at digitalservices.georgia.gov/help to place this block on your homepage.)
>
> ii. Show your **complete form as a teaser**.
>
> iii. Allow authenticated users – your site's editors – to **save their own submission drafts**.
>
>> 1. When a logged-in user goes to the Webform, they'll see a "Save Draft" button at the bottom of the page. If they click this button and leave the Webform, their answers will still display when they return.
>>
>> 2. Logged-out users will not see this button and their answers will not save if they leave the Webform.
>
> iv. **Automatically save drafts between pages** of a multi-page form for authenticated users — your site's editors.
>
>> 1. When a logged-in user goes to the next page of a multi-page Webform, their answers will save as a draft. If they leave the Webform, their answers for the first page will still display when they return.
>>
>> 2. Logged-out users's answers will not save if they leave the Webform. However, if they go to the next page of a multi-page Webform, they will see their answers if they click the "Previous Page" button, as long as they don't leave the Webform.
>
> v. Notify respondents if they've **previously submitted** a form.
>
> vi. Change the Submit button text. (It says "Submit" by default)

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. Click **Edit**

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. (Unlike other content types, Webform does not use Workbench, so you will not see your forms listed there.)

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2.4.   Setting Up Email 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*.
4) 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*. (Because building custom templates requires greater knowledge of Token values, we'd suggest using the default settings.)
   c. Click **Included e-mail values** to select which fields your recipient will see. (All fields are selected by default.)
5) When you're done formatting this email address, **Save e-mail settings**.

You can add multiple submission recipients to your Webform this way.

2.5.   Setting Up E-mail Confirmation

To send Webform results to the user who filled out the form:

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) Select the **Component Value** radio button and choose *Email* from the dropdown.

> Note: In order for a recipient to receive an email, the Webform itself must contain a field for their email address.

4) 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*. (Because building custom templates requires greater knowledge of Token values, we'd suggest using the default settings.)
   c. Click **Included e-mail values** to select which fields your recipient will see. (All fields are selected by default.)
5) When you're done formatting this email address, **Save e-mail settings**.

You can add multiple submission recipients to your Webform this way.

2.6.   Viewing & Exporting Results

To review Webform results:

1) Navigate to your new Webform, and select the **Results** tab.

Figure 19 Webform Results tab

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

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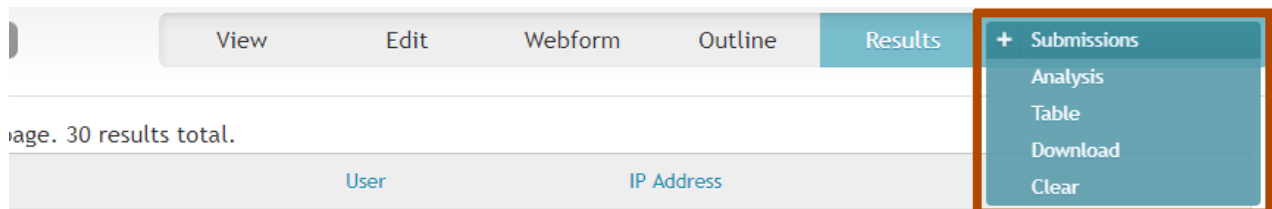

Figure 20 Results view options

2.6.1. Downloading Results

To download your Webform results:

1) After you open the **Download** tab, select your **Export Format** — either *Delimited Text* or *Microsoft Excel*.
   a. If you chose to download in Delimited Text, you'll also select your *Delimited text format*. The default is set as the *Tab* format.

2) Click **Select list options** to expand
   a. 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.)
   b. **Select list format** — Decide if you want select list data to display as *Separate* or *Compact* data.

3) Click **Included export components** to expand
   a. Select which components you'd like to include in your export. (All components are checked by default.)

4) Click **Download range options** to expand
   a. Select which submissions you'd like to include in the report. You can limit your submissions by *number* or *submission ID*.

2.7.   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.

Note: 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 can 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.

2.8.   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.

2.9.   Apply Your Knowledge: Exercises

Complete **Exercises 2-3** in your **Advanced Editor's Guide: Exercises** manual (digitalservices.georgia.gov/advanced-training).

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2.10. Convert Webform Submissions to PDFs

You can convert individual Webform submissions to downloadable PDFs with a few additional settings. Site editors can download these PDFs from the Webform Results page, and you can set it so that the PDF is attached to the emails sent to the form recipients.

Agencies can design the format of the PDF using HTML, and the Webform will automatically populate the fields of the PDF and apply a PDF version for each submission. These PDFs are simple, but can be customized to adhere to a specific format by using HTML.

To add PDF conversion to your Webform:

1) In the Webforms toolbar, mouse over + Form Components and select **Generate PDF**.
2) Check **Generate PDF Document** (By clicking this box, you enable editing options)
3) Click **General Settings** to expand
    a. Set the **Paper size** to the appropriate site (e.g. *Letter*, *Legal*, etc.).
    b. Set your **Page orientation** as either *Portrait* or *Landscape*.
    c. You can upload a **Background image** for your PDF (e.g. watermark).
4) Click **E-mail Settings** to expand
    a. To include the PDF in an email to be sent to the recipient, check **Attach PDF** as an attachment to the emails sent to the form recipients. Use this feature if it is necessary for the user to receive a copy of the form they filled out (e.g. a complaint form, voluntary background check form, etc.).
    b. **Don't attach PDF file** — Control which email addresses should or should not receive the attachment. If any form recipient *should not* receive it, *uncheck* that specific email account.
5) Click **PDF Header** to expand
    a. **Upload left side logo** — click *Choose File* and select a graphic from your machine to appear in the top-left corner of the PDF. If the size of the uploaded image is more than 270x205, it will be resized to this size.
    b. **Header text** — enter any text you want to appear at the top of the page. This text should explain the document or act as a title.
    c. **Text alignment** – Choose the alignment for your paragraph text.
    d. **Font Family** – Choose the preferred font family to use for your PDF.
    e. Adjust the **Font size** of your PDF.
    f. **Upload right logo** — click *Choose File* and select a graphic from your machine to appear in the top-right corner of the PDF. If the size of the uploaded image is more than 270x205, it will be resized to this size.

6) Click **Content of the PDF document** to expand

   a. Control the *text*, *layout*, and *fields* of the PDF using the **WYSIWYG**. Use the *field key* of each Webform field to generate the results in the PDF.

      i. To add a **field key**:

         1. Use a separate browser tab to navigate back to **Form components** and click **Edit** under Operations for each specific field.

         2. Copy the text under the **Field Key** header.

         3. Back in the Content of the PDF Document browser window, paste the field key in your desired location, in the format: **%value[FIELD_KEY_HERE]**. You will need to do this for each field you want to display in the PDF form.

      ii. Use the dropdowns to adjust the *Text alignment*, *Font Family*, and *Font Size* of the field keys

7) Click **PDF footer** to expand

   a. **Upload left side logo** — click *Choose File* and select a graphic from your machine to appear in the bottom-left corner of the PDF. If the size of the uploaded image is more than 270x205, it will be resized to this size.

   b. **Header text** — enter any text you want to appear at the top of the page. This text should explain the document or act as a title.

   c. **Text alignment** – Choose the alignment for your paragraph text.

   d. **Font Family** – Choose the preferred font family to use for your PDF.

   e. Adjust the **Font size** of your PDF.

   f. **Upload right logo** — click *Choose File* and select a graphic from your machine to appear in the bottom-right corner of the PDF. If the size of the uploaded image is more than 270x205, it will be resized to this size.

Once the PDF is set up, click **save**.

> **Note:** If you need a custom template for your Webform, please contact **Digital Services Georgia support** (digitalservices.georgia.gov/help).

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3.   Managing Menus

Menus establish the navigational hierarchy of your site. They control the main navigation and the navigation that appears when you click on each of those pages.

3.1.   Types of Menus

The site has the following important menus that provide navigation to Site Visitors:

Menu	Purpose
Header Utility menu	A single row of menu items at the top of all pages
Main menu	The multi-level menu. It appears as a dropdown menu at the top of all site pages, showing the first 2 levels of navigation.
	The sub levels of a top level Main Menu item are also displayed as left-hand navigation. Up to 4 levels of the menu can be displayed on the left of pages that appear in the menu.
Footer Utility menu	The single row of menu items at the bottom of all pages.

Figure 21 Header Utility and Main Menus

Figure 22 Footer Utility Menu

There are other utility menus available that site visitors don't see. These include *Management*, *Navigation*, and *User Menu*. **Do not change these menus**, as they affect how the backend functions for contributors. If you believe that the menu needs to be altered, please consult with a Site Manager or the Digital Services Georgia team

3.2.   Editing Menus

To administer menus, select **Structure** > **Menus** from the Admin Toolbar.

Title	Operations
Footer Utility Utility menu that is located in the footer, site-specific	list links edit menu add link
Header Utility Utility menu appearing in the agency-branded section of the header	list links edit menu add link
Main menu The *Main* menu is used on many sites to show the major sections of the site, often in a top navigation bar.	list links edit menu add link
Management The *Management* menu contains links for administrative tasks.	list links edit menu add link
Navigation The *Navigation* menu contains links intended for site visitors. Links are added to the *Navigation* menu automatically by some modules.	list links edit menu add link
User menu The *User* menu contains links related to the user's account, as well as the 'Log out' link.	list links edit menu add link

Figure 23 Menus edit screen

For each menu, there are controls to customize it:

- **List links** to view all of the links that are within the menu and their hierarchy
- **Edit menu** to edit the description and settings for a menu
- **Add link** to the menu

Select **list links** to see the hierarchy of a menu and edit the menu items

Menu link	Enabled	Operations	
✛ Blog	☑	edit	delete
✛ Our Work	☑	edit	delete
✛ Case Studies	☑	edit	delete
✛ Accessibility	☑	edit	delete
✛ Responsive Migration	☑	edit	delete
✛ Georgia.gov IA	☑	edit	delete
✛ Drupal Migration	☑	edit	delete
✛ Georgia.gov Redesign	☑	edit	delete
✛ Press & Recognition	☑	edit	delete
✛ Awards	☑	edit	delete
✛ Georgia.gov	☑	edit	delete
✛ Write for Georgia.gov	☑	edit	delete
✛ Guidelines for Guest Bloggers	☑	edit	delete

Figure 24 List links for the Main menu

- To **move** menu links around in the hierarchy, click the *handle* to the left of the menu item, and drag and drop it to its new place in the menu. Click **Save Configuration** at the bottom of the page to save your changes.

- To **disable** menu links (so they don't appear in the visible navigation menu), uncheck the *Enable* checkbox for the menu item. (Unless otherwise indicated with a Parent Reference, the page will still display with the same side menu as when its menu link was enabled, but it will not actually appear in the menu.)

- To **edit** a menu item's URL or Title, click the **edit** link to the right of the menu item.

- To **delete** a menu item, click the **delete** link to the right of the menu item.

3.2.1. Editing Links

Go to **Structure** > **Menus** and click on **list links** in the "Main menu" row.

Figure 25 "List links" link on the Menus edit screen

Click **Edit** to the right of a link to update it.

Figure 26 Edit link on the Main Menu list links page

Required fields:

- **Menu link title:** The menu title displayed to visitors.

- **Path:** The target URL that the menu should link to. (Include everything *after* the first **/** in the page URL for internal links)

Optional fields:

- **Description:** The text description of the menu item, which will not be displayed to the user.
- **Enabled:** To turn the link on or off in the Main Menu
- **Show as expanded:** To indicate if the menu item has children, or sub-items.
- **Parent link:** To assign a menu item to a parent menu item. If you select <Menu Name>, the link will display at the top level of the menu
- **Weight:** A text-based way to place a menu item. When done, select Save to close the menu.

> **Note:** You may find it easier to edit the *Parent link* and *Weight* visually on the list links page. To move menu links visually, click the *handle* to the left of the menu item, and drag and drop it to its new place in the menu. Click **Save Configuration** at the bottom of the page to save your changes.

When you've finished editing the menu link, **Save**.

3.2.2. Adding Links

Go to **Structure** > **Menus** and click on **+ Add link** in the "Main menu" row.

Title	Operations		
Footer Utility Utility menu that is located in the footer, site-specific	list links	edit menu	add link
Header Utility Utility menu appearing in the agency-branded section of the header	list links	edit menu	add link
Main menu The *Main* menu is used on many sites to show the major sections of the site, often in a top navigation bar.	list links	edit menu	add link

Figure 27 Add link on the Menus edit screen

The screen to add a new link matches the screen for editing a link.

Required fields:

- **Menu link title:** The menu title displayed to visitors.
- **Path:** The target URL that the menu should link to. (Include everything *after* the first **/** in the page URL for internal links)

Optional fields:

- **Description:** The text description of the menu item, which will not be displayed to the user.
- **Enabled:** To turn the link on or off in the Main Menu
- **Show as expanded:** To indicate if the menu item has children, or sub-items.
- **Parent link:** To assign a menu item to a parent menu item. If you select <Menu Name>, the link will display at the top level of the menu

- **Weight:** A text-based way to place a menu item.

> **Note:** You may find it easier to edit the *Parent link* and *Weight* visually on the list links page. To move menu links visually, click the *handle* to the left of the menu item, and drag and drop it to its new place in the menu. Click **Save Configuration** at the bottom of the page to save your changes.

When you've finished editing the menu link, **Save**.

3.2.3. Adding Special Pages to the Menu

There are several special pages on your site that can be linked to from menus or from within body content.

> **Note:** These pages auto-generate, but will not appear in your navigation until you create a menu item.

Page Type	Page Path	Description
Blogs	blogs	Listing page showing blog entries, with the most recent at the top. This page shows 10 blog entries at a time.
Press Releases	press-releases	Listing page showing press releases, with the most recent at the top. This page shows 10 press releases at a time.
Press Release [year]	press-releases/[yyyy]	Listing page showing press releases only from a specific year.
Press Release [month]	press-releases/[yyyy]-[mm]	Listing page showing press releases only from a specific month and year.
Staff Directory	staff-directory	Listing page showing all Profiles checked with the Staff or Leadership attribute. This page shows 10 Profiles at a time.
Leadership	staff-directory/leadership	Listing page showing all Profiles checked with the Leadership attribute. This page shows 10 Profiles at a time.
Event	events	Listing page showing upcoming events, with the soonest occurring at the top. This page will show 5 events at a time. In addition, a "Featured Event" content area appears at the top of the page to promote events.
Documents	documents	Listing page showing documents, with the most recent at the top. This page shows 10 documents at a time.
Forms	documents/forms	Listing page showing forms, with the most recent at the top. This page shows 10 forms at a time. This page has a filter and search bar to navigate through the forms types.
Services	services	Listing page showing services, with the most recent at the top. This page shows 10 services at a time.
Media	media	Shows a Gallery style view of all media items on the site using the Photo-Gallery or Video content types.
Photo Galleries	media/photo-galleries	Listing page showing photo galleries, with the most recent at the top. This page shows 10 galleries at a time.
Videos	media/videos	Listing page showing videos, with the most recent at the top. This page shows 10 videos at a time.
Locations	locations	Listing page showing all locations.

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Page Type	Page Path	Description
Locations [type]	locations/[type]	Listing page showing all locations checked with a type attribute.
Find a Location	find-location	Map of all locations, using geolocation. The checkbox filter on the page works with the search bar or separately. By default, the page will show all location types.
Find a [type]	find-location/[type]	Map of all locations checked with a type attribute, using geolocation. The checkbox filter allows you to filter by services offered under that type, and it works with the search bar or separately. By default, the page will show all services offered.

These pages are available to help organize site content. To add one to your website, use the steps in **3.2.2. Adding Links**, and use the Page Path above in the Path field.

3.3.   Apply Your Knowledge: Exercises

Complete **Exercises 4-5** in your **Advanced Editor's Guide: Exercises** manual (digitalservices.georgia.gov/advanced-training).

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4.   Managing Profiles

4.1.   Organize Profile Listing Page

All published Profiles are listed at **YOURSITE.georgia.gov/staff-directory**. You can also list a subset of Profiles by associating them with a specific taxonomy term. This feature allows you to classify your profiles according to your hierarchal structure. By default, you have the option to set the Staff Type to Leadership on a Profile to display all Leadership profiles under **YOURSITE.georgia.gov/staff-directory/leadership**.

Figure 28 Marking a Profile's Staff Type as Leadership

4.1.1.   Create New Profile Staff Types

To create an additional Profile listing page, you need to add a new term to your Staff Type drop-down list. Someone with Taxonomy Manager permissions for your website can create new taxonomy terms. (Note: this is typically the primary web manager for your website). To create a new Taxonomy term for Staff Type:

1) Go to **Structure** > **Taxonomy** and click on **list terms** in the "Staff Directory" row.

Vocabulary name	Operations		
Blog Terms	edit vocabulary	list terms	add terms
Document Terms	edit vocabulary	list terms	add terms
Document Types	edit vocabulary	list terms	add terms
Form Type	edit vocabulary	list terms	add terms
Location Areas	edit vocabulary	list terms	add terms
Location Types	edit vocabulary	list terms	add terms
Master Terms	edit vocabulary	list terms	add terms
News Release Types	edit vocabulary	list terms	add terms
Service Terms	edit vocabulary	list terms	add terms
Services Terms	edit vocabulary	list terms	add terms
Staff Directory	edit vocabulary	list terms	add terms
Tile Color	edit vocabulary	list terms	add terms

Figure 29 "List terms" link on the Taxonomy edit screen

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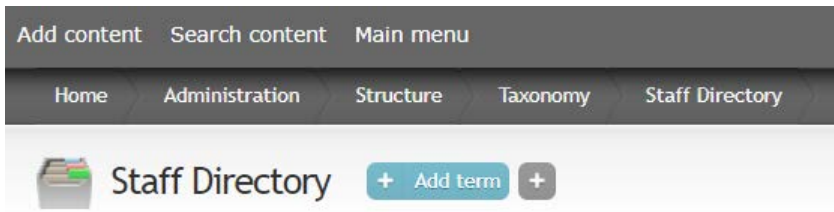2) On the Staff Directory screen, click **+ Add term**

Figure 30 "+ Add term" button on the Staff Directory list terms screen

3) On the new screen, in the **Name field**, enter the name for your term, such as "Board Members."
4) Do not change any of the settings in the Taxonomy menu.
5) Click **Save** to finish adding your term.

4.1.2. To view your new Profile listing page

Upon adding terms to the Staff Directory, you are able to view the URL of the new page by placing your added term after the last slash of **YOURSITE.georgia.gov/staff-directory/**. If your term has more than one word, replace spaces with dashes.

Type **YOURSITE.georgia.gov/staff-directory/[term]**

- e.g. the URL of a listing page showing all Profiles with a Staff Directory type of "Board Members" would be at **YOURSITE.georgia.gov/staff-directory/board-members**

Note: These pages are Views. Although they can be disabled/turned off from showing in the menu, they cannot be unpublished.

4.2.   Sort Profile Pages

You can rearrange the order of your Profiles on the listing pages with drag-and-drop from a special Staff Directory Sort page.

4.2.1.   Sort Using Drag-and-Drop

1) Log in and go to **YOURSITE.georgia.gov/staff-directory-sort**.

2) To move Profiles, click and hold on the *handle* to the top left of the individual profile box; now drag-and-drop those profiles in the order you desire.

Figure 31 Staff directory sort by drag-and-drop handle

3) Click **Save** at the bottom of the page.

4) Visit the associated profile page (e.g. **/staff-directory** or **/staff-directory/leadership**) to make sure changes have been implemented as expected.

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4.2.2. Sort By Row Weights

If for any reason, you have trouble using the drag-and-drop method, you can adjust the order using row weights:

1) To rearrange profiles by row weights, click **Show row weights**.
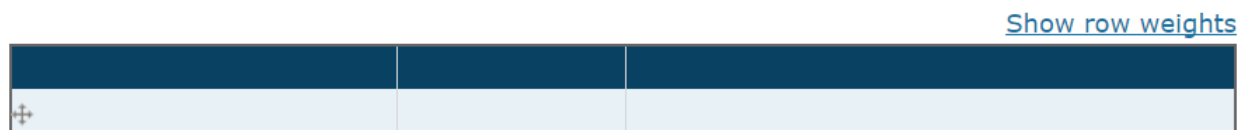
Figure 32 "Show row weights" link on the Staff Directory sort page

2) To change the weight of the profile, simply click the drop-down box next to the profile and choose a weight from the list given. Profiles with lower weight will "float" to the top of lists, while larger numbered items will "sink." Negative numbers are lighter than positive numbers.

Figure 33 Staff Directory sort by weight

3) Click **Save** at the bottom of the page.
4) Visit the associated profile page (e.g. **/staff-directory** or **/staff-directory/leadership**) to make sure changes have been implemented as expected.

5. Managing Metatags

Metadata is data (information) about data. Metadata will not be displayed on the page, but will be machine readable. Meta elements are typically used to specify page description, keywords, and author of the document, last modified, and other metadata. The metadata can be used by browsers (how to display content or reload page), search engines (keywords), or other web services.

Your site uses the following:

- **Description:** Almost all the major search engines like Yahoo, Google, Fast and Altavista will use your description tag. You have a direct input on the way people will see your website in the list of results. And because you control this, you can influence the click-behavior.

- **Abstract:** The meta tag abstract can be used to indicate in just a very short sentence what the web-page is about. So every web-page of your website gets its own abstract-tag.

- **Keywords:** A lot of online proceedings start with a search query. You browse to a search engine and you will fill out certain keywords that match what you are looking for. That's why it's so important to put relevant and correct keywords in your meta tags in the source of your web-page.

- **Note:** Abstract meta tag appears to be equal to the description meta tag but they are different. The description meta tag is used by many search engines as a small text under the click-able title. The abstract-tag is hardly used by anybody.

But there are several search engines that use abstract to archive your page. And this increases your change that your website will be better archived, including a link to your website. But we don't suggest that you edit all your web-pages to add this abstract-tag.

5.1. Homepage

1) Log in as Editor.
2) Click **Configuration** in the Admin toolbar.
3) Click **Metatag** in the "Search and metadata" section.
4) Click **Override** in the "Global: Front page" row. (The option will be Edit if this has already been updated.)

Type	Operations
▶ Global	Override Disable Export
▶ Global: 403 access denied	Override Disable Export
▶ Global: 404 page not found	Override Disable Export
▶ Global: Front page	Override Disable Export
▶ Node	Override Disable Export
▶ Node: Blog Entry	Override Disable Export
▶ Node: Web Guide	Override Disable Export

Figure 34 "Override" link on the Metatag configuration screen

5) Enter desired metatags for each value.

6) Click **Save**.

5.2.   Landing Pages

1) Log in as Editor.

2) Navigate to the landing page you want to edit, and click **Edit** under the title.

3) Scroll to the bottom and select **Meta tags**.

Figure 35 Meta tags edit section on a Landing Page

4) Enter desired metatags for each value.

5) Click **Save**.

5.3.   Site Pages

1) Log in as Editor.

2) Navigate to the site page you want to edit, and click **New Draft** (or Edit Draft) above the title.

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3) Scroll to the bottom and select **Meta tags**.

Figure 36 Meta tags edit section on a Site Page

4) Enter desired metatags for each value.

5) Click **Save**.

6.   Managing the Homepage

Homepages typically contain many content areas to feature content promotions that draw visitors further into the site. In the GeorgiaGov Drupal Platform, some content areas automatically update, and you can use these to directly curate what site visitors see.

> **Note:** All new homepage boxes must be added to your site by an Administrator. To request a new homepage box, contact **Digital Services Georgia support** (digitalservices.georgia.gov/help).

6.1.   Automatic Content Areas

Certain homepage boxes update automatically as new information is published. Some of these boxes are:

- **Latest:** Automatically shows the 3 most recent blog entries and press releases
- **Events Schedule:** Automatically shows the next 3 upcoming events
- **Stay Connected:** Links to your agency's social networking pages. A Site Manager or Administrator can configure this box with the appropriate links.
- **From Twitter:** The latest tweet from a specified Twitter user or hashtag
- **Most Viewed [content type]:** A list showing the documents (or other content type) that are most viewed on the site according to Google analytics.
- **Featured Blog Block:** A "hero style" block to highlight the latest blog entry with a large image and summary.

6.1.1. Latest

The Latest box shows the 3 latest Blog Entries and Press Releases automatically. When these items are published, they fill the content area with the most recent entry at the top.
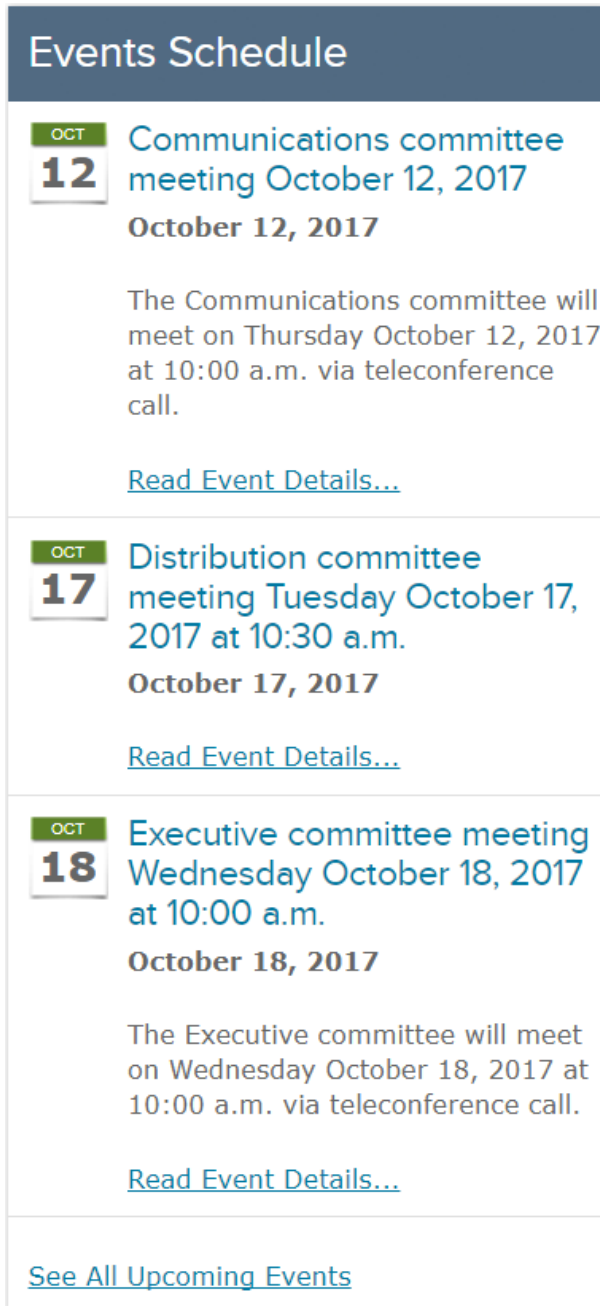

Figure 37 Latest News box

The title and "Read More" link associated with each item go to the full Blog Entry or Press Release. The "See More Latest News" link at the bottom goes to **YOURSITE.georgia.gov/latest-news**, which shows all Blog Entries, starting with the most recent and showing 10 items per page.

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6.1.2. Events Schedule

Upcoming events are displayed in the "Events Schedule" content area. This shows next 3 upcoming events with the soonest at the top.

Figure 38 Events Schedule box

The title and "Read Event Details" link associated with each item go to the full event posting. The "See All Upcoming Events" link directs visitors to **YOURSITE.georgia.gov/events**.

6.1.3. Stay Connected

The Stay Connected box is a special content area to link to your Agency's social networks.
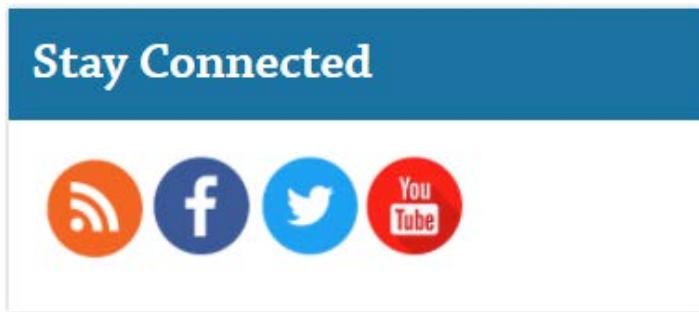

Figure 39 Stay Connected box

From this content area, you can link to the following:

- Agency RSS Feed
- Facebook
- Twitter
- YouTube
- Vimeo
- Instagram
- Pinterest
- blip.tv
- Delicious
- Flickr
- Foursquare
- Google+
- last.fm
- LinkedIn
- MySpace
- Newsletter
- Picasa
- Spiceworks
- Tumblr
- Viadeo
- Virb
- Xing

6.1.4. From Twitter

Once configured, this content area shows the latest tweet(s) from a configured feed or hashtag.

Figure 40 From Twitter box

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** is used in the back-end interface to identify this box, so it should be unique, though it is not shown to site visitors.
- **Box Title** is the title shown to site visitors at the top of the tweet box.
- **Twitter Search** is the **@username** or **#hashtag** that will populate the tweet box. Be aware that hashtag searches are all inclusive of Twitter, so select the hashtag to follow carefully.
- **Max Tweets** is the number of tweets to show at a time. Typically, this is 1, but the content area can accommodate many more. When configured for more, the latest tweet will appear at the top of the content area.

6.1.5.   Most Viewed [content type]

Most Viewed boxes use your Google Analytics code to find the top 5 most viewed items of a particular type on the site. Once configured, they do not require any editing or curation.
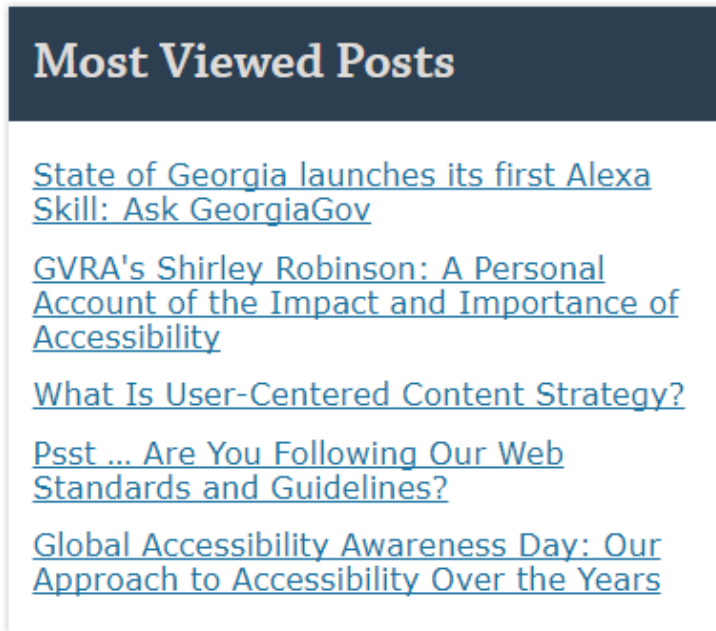

Figure 41 Most Viewed Posts (Blog Entries) box

There are Most Viewed boxes available for:

- Documents
- Blog Entries
- Press Releases
- Pages
- Content

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6.1.6. Featured Blog Block

A "hero style" block to highlight the latest blog entry on a homepage or landing page with a large image and summary. It's designed to take up 2 columns.
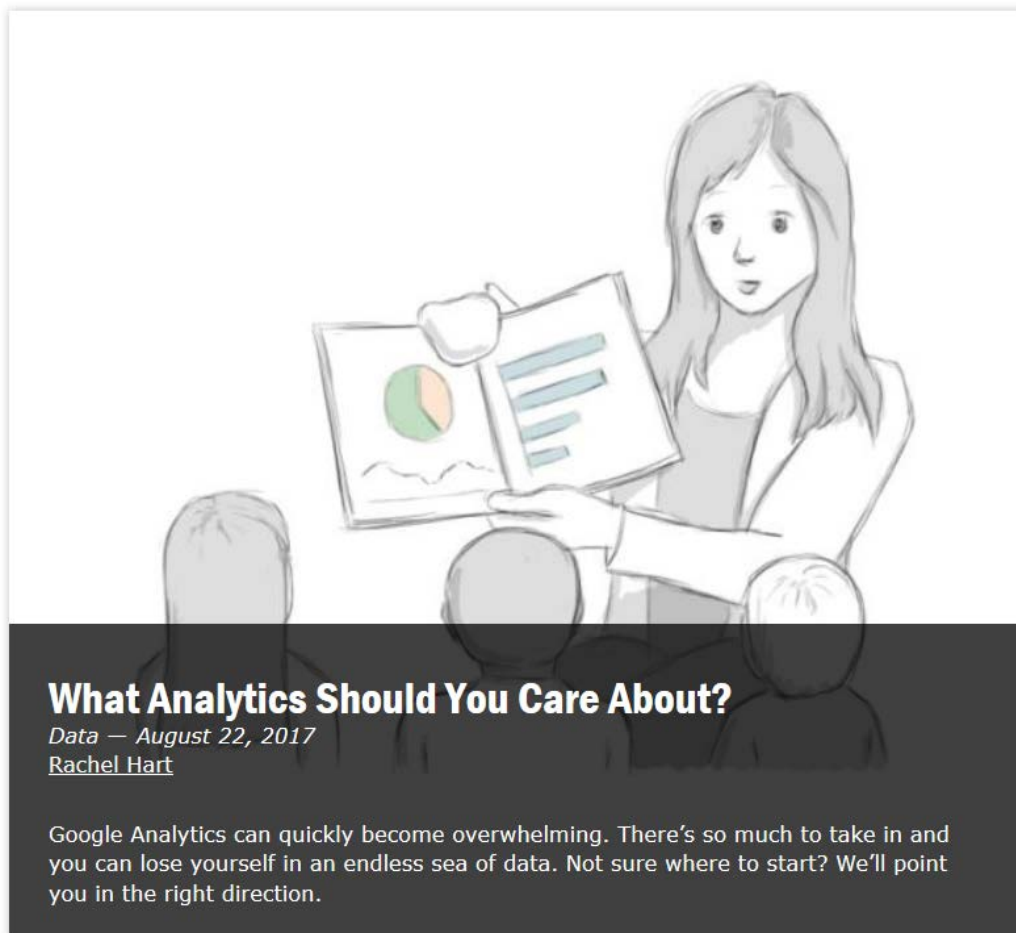

Figure 42 Featured Blog block

See what this block looks like live on **our homepage** at digitalservices.georgia.gov.

The block will automatically display the most recent Blog Entry that meets the following requirements:

- Blog Entries must have a **summary**.
  - We recommend keeping this *text short* – no more than around 260 characters – to display correctly on mobile devices.
- Blog Entries must have a **structured image**. Dimensions must be at least **830px wide** and **625px tall**.
  - We recommend using an image that is *mostly white at the bottom* (such as a line drawing with a white background). If not, we suggest adding a slight feather to the bottom of the image. This will prevent the bottom of the image from standing out behind the transparency.

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6.2.   Manually Updated Content Areas

Certain homepage boxes need to be updated manually. Some of these boxes are:

- **Rotator Box:** Used for the Homepage Feature Rotator
- **Tiles:** Used to highlight certain content items, and paired with icons or images
- **List Index:** List of links (inside or outside the site), with the option to add link descriptions
- **Promotion List Box:** List of links (inside or outside the site), with the option to add link descriptions and thumbnails
- **Image Box:** Image with option to link the image and add text
- **Promotion Box:** Image with option to add text and a link
- **Editor's Choice:** Flexible WYSIWYG box
- **Popular Posts:** A "list style" block allowing you to manually populate and prioritize blog entries on your website.

6.2.1. Rotator Boxes

Rotator Boxes are used to feature items on your site, or display pictures related to your agency. They can be placed in several positions and sizes on the homepage:

- Full Width text and Image
- Double Column Image with text below
- Double Column Image with no text (Image Only)
- Single Column Image with text below
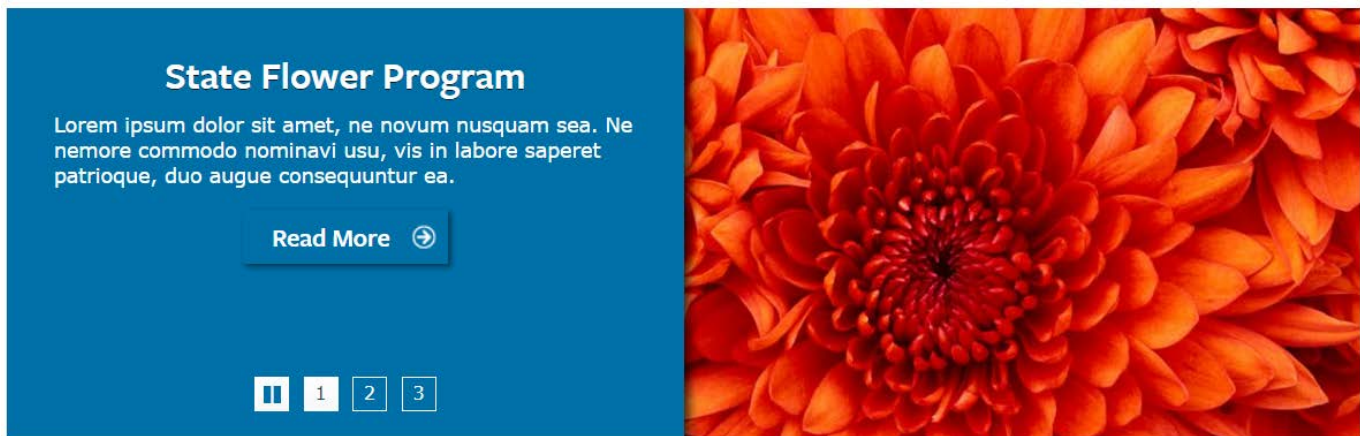- Single Column Image with no text (Image Only)

Figure 43 Full Width text and Image Rotator Box

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** does not show to site visitors and only needs to be a descriptive name to identify the box in the backend interface.
- **Box Title** also does not show for Rotators.
- **Rotator Elements**:
  - **Title** is the title of that rotator item.
  - **Custom Description** gives some detail to that item.
  - **Image** is the image to be used for that item (see **Appendix** for dimensions).
  - **Alternative Text** is text that describes the Image for screen readers.
  - **Title** is used as a tool tip when the user hovers the mouse over the image.
  - **External Link** links this item off to a page that is *not* on your website.
  - **Node Reference** links to content on your website. (If you use this, leave External Link empty.) Start typing the title, and the auto-complete field will show the titles of matching content.
- **Add Another Item** creates another set of fields for adding another rotator element.
- **Image Only**: check this to make this an image-only rotator.

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6.2.2. Tiles

Clickable blocks used to highlight certain content items, and paired with icons or images.
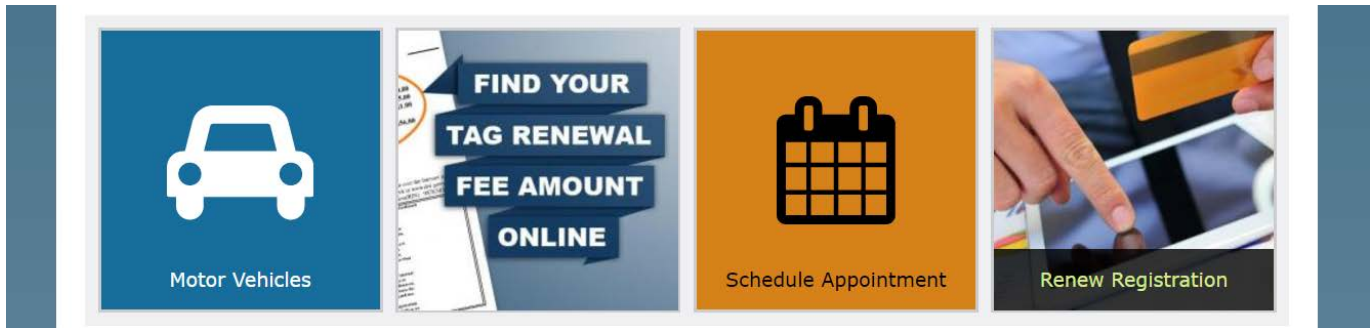

Figure 44 Tiles: 2 Icons with Text, 1 Image with non-visible Link, 1 Image with Text and Link

See what Tiles look like live on our **Tiles demo page** at digitalservices.georgia.gov/tiles-demo

There are 5 Tile Layouts available:

- Icon with Text
- Image Only
- Image with non-visible Link
- Image with Text and Link
- Block of Color

To edit a Tileset (group of up to 8 Tiles), hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit tileset**.

Choose **Add new Tile** or **Add existing Tile** (to choose from a list of previously created tiles; Just start typing in the bar and a list of available Tiles will appear).

See full instructions on adding and editing each type of Tile in our **Tile instructions online** (go to digitalservices.georgia.gov/help and search "Using Tiles")

6.2.3. Image Boxes

Image boxes display an image and its caption in a single column.
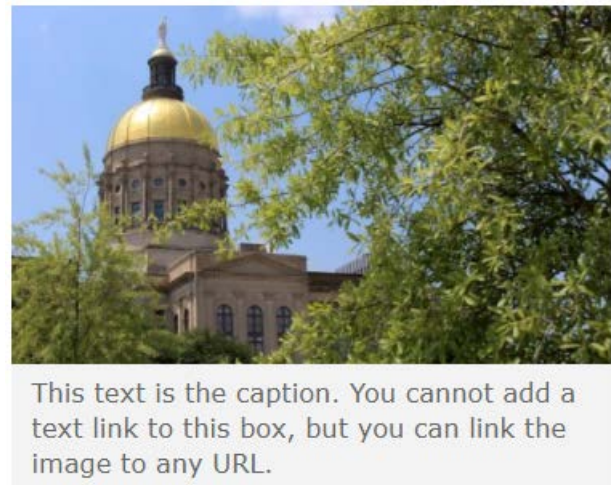

Figure 46 Image Box with a caption, but no title

Figure 45 Image Box with a title and caption

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** does not show to site visitors and only needs to be a descriptive name to identify the box in the backend interface.
- **Box Title** is *optional*. If you enter a title it will show above the image for site visitors.
- **Image** is the image to be used in the box (see **Appendix A** for dimensions).
- **Caption** displays beneath the image to site visitors.
- **Link** specifies what, if anything, the image box should link to (optional):
  - **Title** is the title of the link (not shown)
  - **URL** is the target for the link (must be an absolute URL)
- **Node Reference** links to content on your website. (If you use this, leave URL empty.) Start typing the title, and the auto-complete field will show the titles of matching content.

6.2.4. Promotion Boxes: Images and Calls to Action

Promotion boxes can take two forms: a large image promotion, or a "Call to Action" promotion with a small thumbnail image or icon.

Figure 48 Image Promotion box with explanatory text, a link, and no title

Figure 47 Image Promotion box with explanatory text, a link, and title
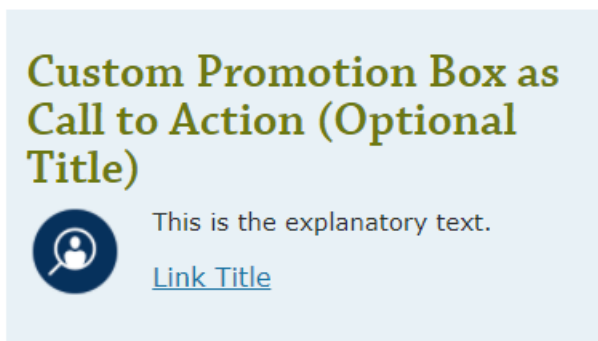

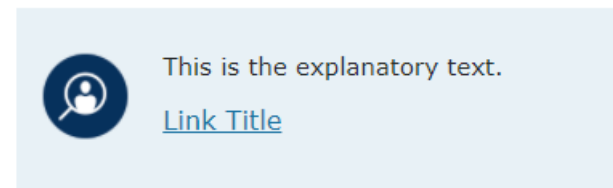**Figure 50** Call to Action box with explanatory text, a link, and no title

Figure 49 Call to Action box with explanatory text, a link, and title

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To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** is not visible to site visitors, and only needs to be a descriptive name to identify the box in the administrative interface.
- **Box Title** shows to site visitors for the Promotion Box as a heading for the content area (note the style difference for Image Promotion and Call to Action promotions).
- **Explanatory Text** shows beneath the heading.
- **Image** is the image to be used in the promotion (see **Appendix A** for dimensions).
- **Link** specifies what, if anything, the image box should link to (optional)
    - **Title** is the title of the link beneath the explanatory text
    - **URL** is the target for the link (must be an absolute URL)
- **Call to Action** is a checkbox that changes the Image Promotion into the differently styled, small image Call to Action promotion.

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6.2.5. List Index (Link List)

The Index List is a simple, text-only way to present links on your site.
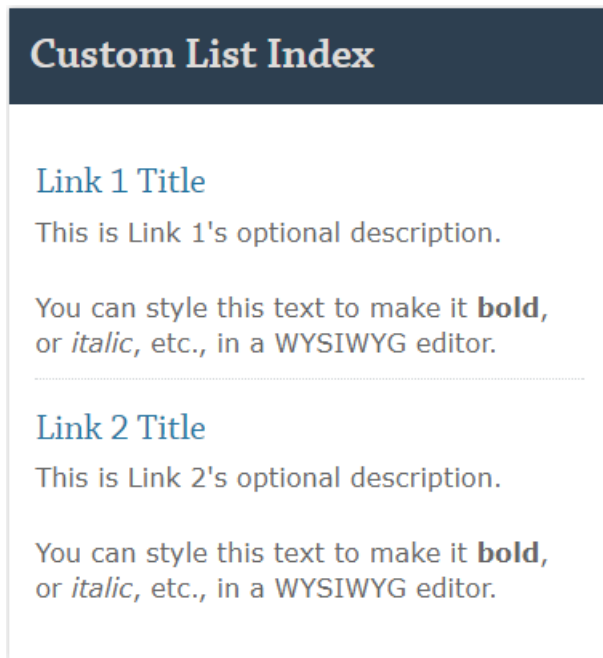

Figure 51 List Index box

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** does not show to site visitors and only needs to be a descriptive name to identify the box in the backend interface.
- **Box Title** is visible to site visitors above the list.
- Each link has a title and link, related content reference and a description:
  - o **Title** and **URL** are used together to specify an external link and the text to show users. (Must be an absolute URL)
  - o **Related Content** can be used *instead of the Title and URL* to select a piece of content on the site by title. (It is an auto-complete field.)
  - o **Description** is shown below the link to describe the link. It can be set to a WYSIWYG field using the Text Format dropdown menu.
  - o **Remove** button to remove the link from the box.
- **Add Another Item** button will add another link to the content area.

6.2.6. Promotion List Box

Featured Items are a list of promoted items along with image thumbnails. More than image links, the small images can be used to draw attention to the topic and description.
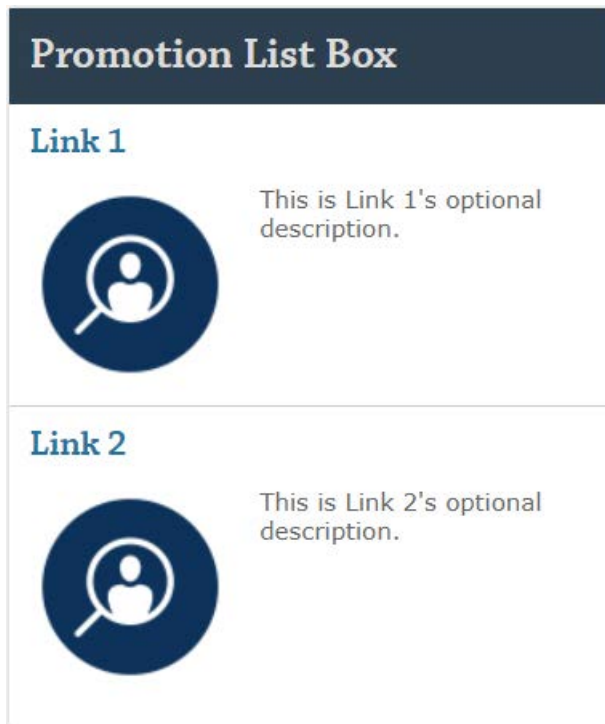

Figure 52 Promotion List box

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Box**. Complete the following:

- **Box Description** is not shown to site visitors but should be a unique title as it is displayed in the administrative interface.
- **Box Title** is displayed to site visitors above the list (e.g. " Featured Topics", above).
- Each link can have an image, title and link, node reference, and a description:
    - o **Image** is an image upload field (see **Appendix A** for dimensions).
    - o **Alt Text** is a field to add alternate text for the image.
    - o **Title** is used as a tooltip for the image (this is shown to users when they hover their mouse over the image).
    - o **Description** is shown below the link.
    - o **URL** is used to specify an absolute URL for the featured item (Must be an absolute URL).
    - o **Related Content** can be used instead of the URL to select a piece of content on the site by title (It is an autocomplete field).
    - o **Remove** button to remove the link from the box.
- **Add Another Item** button to add another featured item to the box.

6.2.7. Editor's Choice

Editor's Choice is a flexible WYSIWYG box that you can edit just like a WYSIWYG box on a Site Page. In most themes, they display without a border or drop shadow.
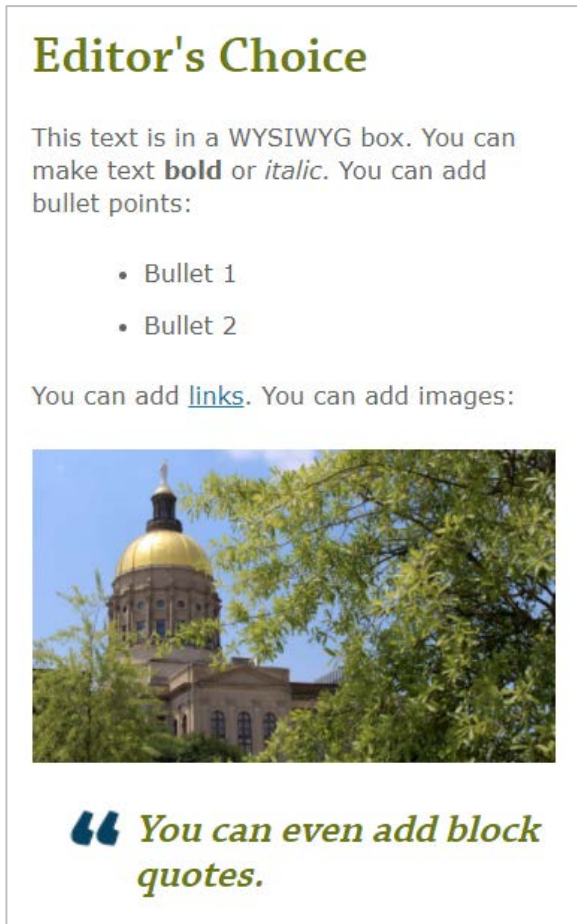

Figure 53 Editor's Choice box (border added)

To edit, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit**.

You'll see an edit screen, similar to the edit screen for a Site Page. Make any necessary changes to the Title and Body, and **Save**.

6.2.8. Popular Posts

Shows a list of **up to 4 Blog Entries**. Once we know what blogs you want to feature initially, we'll add the block to the desired location and you can take it from there. Update however frequently makes sense for your content strategy.

Figure 54 Popular Posts block

See what this block looks like live on **our homepage** at digitalservices.georgia.gov.

To edit which Blog Entries show in this block, hover your mouse over the box, and select the Gear Icon in the upper-right corner. Select **Edit Subqueue**.

- **Rearrange** the list with *handles* on the left of each Blog Entry title.
- Delete list items with the **Remove** button on the right of each Blog Entry title.
- **Add** new items to the list with the field at the bottom
    - Start typing the title of a Blog Entry to see suggestions
    - Select the Entry you want and click **Add Item**
    - If you add more than 4 items, the block will display the last 4 displayed in this list.
- **Save**

6.3.   Apply Your Knowledge: Exercises

Complete **Exercise 6** in your **Advanced Editor's Guide: Exercises** manual (digitalservices.georgia.gov/advanced-training).

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7.   Checking for Broken Links

While many 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.

Download and install **Xenu's Link Sleuth** (xenus-link-sleuth.en.softonic.com).

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**.
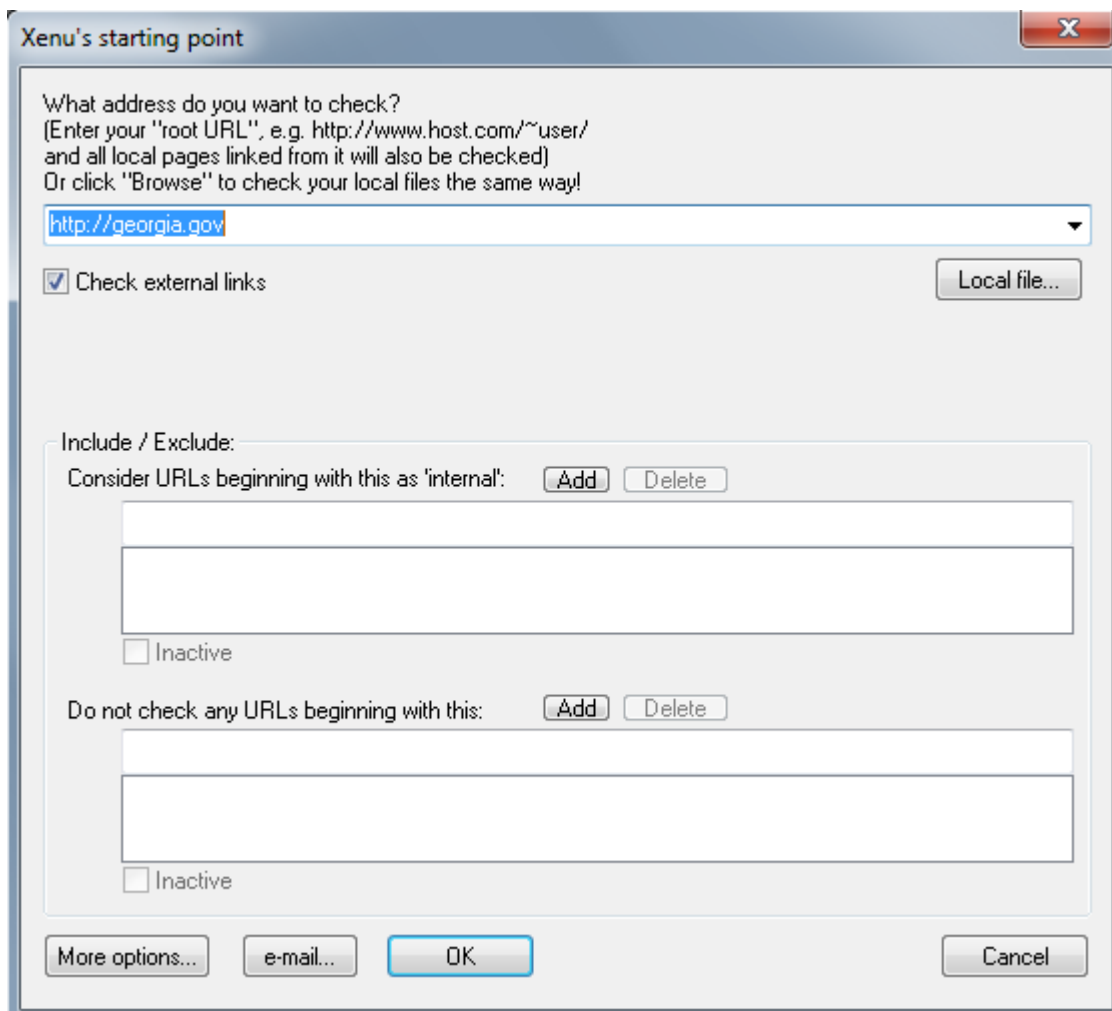2) In the first blank field, type in your site's Web address.

Figure 55 Entering a URL to check links in Xenu

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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.
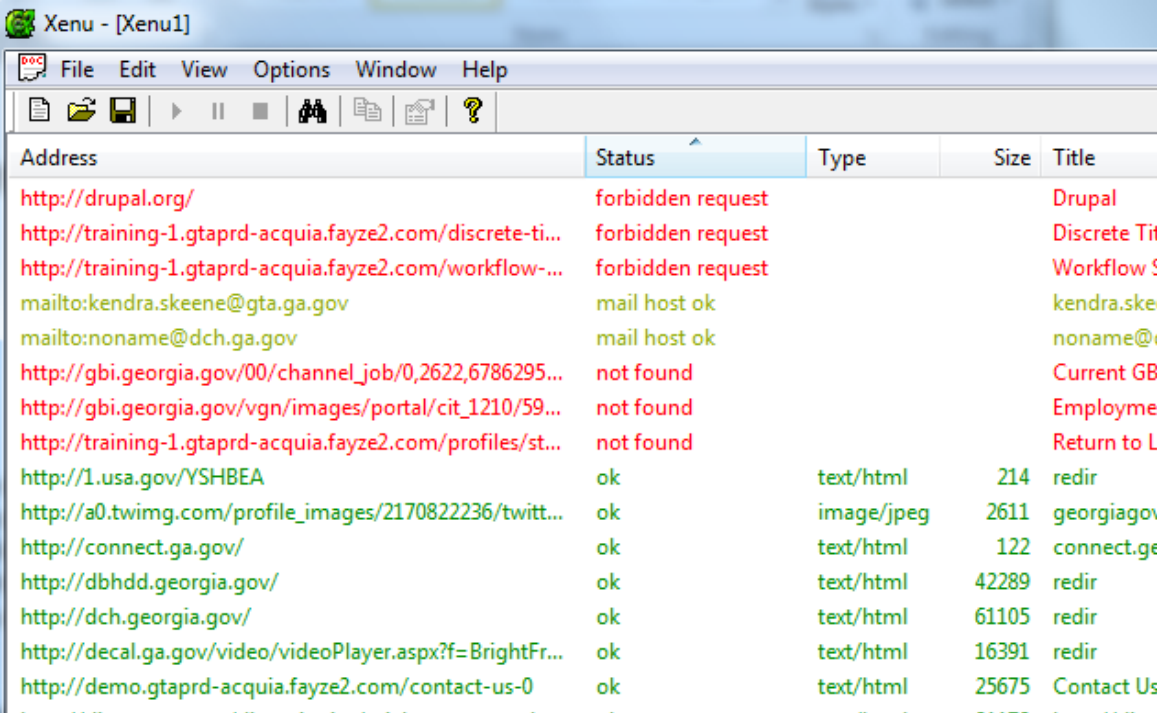
> **Note:** Running a comprehensive check of all links on your site could take some time but is an invaluable way to let you know if any links to external locations no longer work.

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 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 56 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.
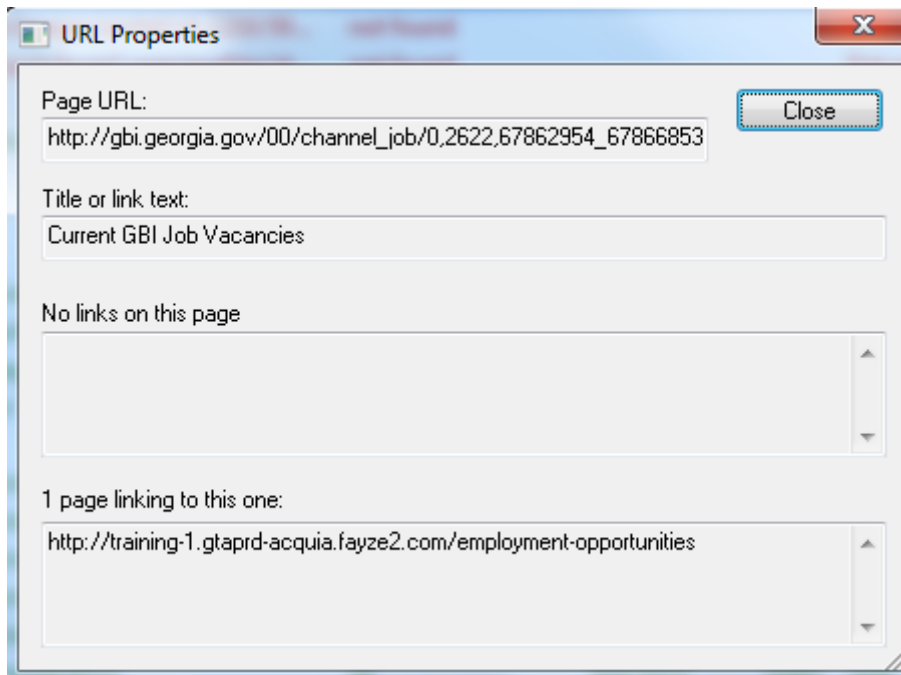

Figure 57 URL Properties

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.

7.1.   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.

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8.   Site Reports

Custom built based on customer reports, we now have Site Reports on our Drupal Platform. Now all of your important statistics are in one place eliminating the need to navigate and login to a different site for the information you need most. Content Count, Document File Entity Count and Least View Content is now baked right into your site.

- **Content Count** – A report of the total number of published content items by type
- **Document File Entity Count** – Total count of document file entities, listed by mime type.
- **Least Viewed Content** – Content items with the fewest page views over the last 31 days.

Log into your site as usual and click on **Site Reports** in the Admin toolbar.

8.1.   Content Count

Content count provides quick access to the total number of published content on your site

Content Type ▲	Count
Blog Entry	173
Document	1
Event	52
Index List	3
Photo Gallery	8
Profile	24
Site Page	59
Video	38

Figure 58 Content Count report

8.2.   Document File Entity Count

Created to help you keep track of the total number of documents such as pdf's, Excel spreadsheets, and MS Word documents on your website.

Mime Type	Count ▼
application/pdf	123
application/msword	8
application/vnd.openxmlformats-officedocument.wordprocessingml.document	5
application/vnd.ms-excel	3
application/vnd.openxmlformats-officedocument.presentationml.presentation	2

Figure 59 Document File Entity Count report

8.3.   Least Viewed Content

Powered by Google Analytics, our Least Viewed Content module gives you access to site data all in one place helping you to better understand and evaluate the performance of your content. Just log into your site as usual. Click on **Site Reports** and **Least Viewed Pages**.

Title	Content Type	Page Views in the past 31 days	Published Date
About	Site Page	0	April 3, 2013
FAQ's	Index List	0	May 14, 2014
Embedded Videos: Georgia.gov and Alabama.gov on 11/10/2015 on a Motorola G, 3G fast network	Site Page	0	June 29, 2016
GOVTalks Fall 2013: Mobile	Site Page	0	September 22, 2017
GOVTalks Spring 2014: Social Media	Site Page	0	September 22, 2017
Content Playbook, Fallon Tweet	Site Page	0	September 28, 2016
Drupal Migration Survey Results	Index List	0	May 21, 2013
GOVTalks Winter 2014: Usability	Site Page	1	September 22, 2017
Content Makeover	Site Page	1	September 12, 2017
GOVTalks Fall 2015: Data	Site Page	1	September 22, 2017

Figure 60 Least Viewed Content report

When looking at this report, make sure to look at both tabs — **Site Page & Index Lists** and **Other Content Types** — for a complete picture of the least viewed content on your site.
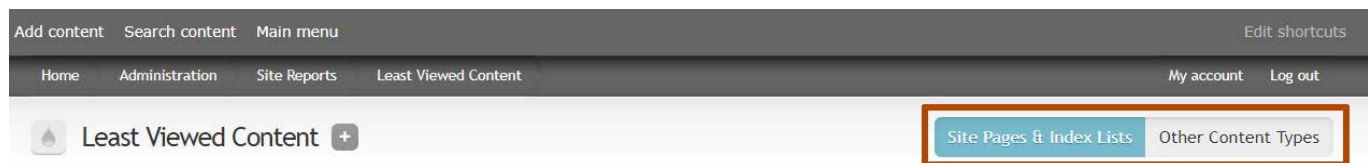

Figure 61 Least Viewed Content view options

Appendix A: Image Sizes

The following are the standard image sizes you may need for different content areas on your website.

Image	Width (Pixels)	Height (Pixels)
Homepage Rotator (Image and Text): Full Width	620	400
Homepage Rotator (Image and Text): 2 Column	600	390
Homepage Rotator (Image and Text): 1 Column	300	195
Homepage Rotator (Image Only): Full Width	940	400
Homepage Rotator (Image Only): 2 Column	600	400
Homepage Rotator (Image Only): 1 Column	300	195
Image Promotion	280 (max)	180-225 (recommended)
Call to Action Promotion (Icon)	48	48
Featured Topics Thumbnail	100 (max)	100 (max)
Featured Image on Media Page	760	570 (recommended)
Photo Gallery and Video Thumbnail	100	100
Photo Gallery Full Size Image	800	600
Profile Thumbnail	200	200

Note: Featured Topic Thumbnail is restricted to 100 pixels in both directions. Images will scale down proportionally so that the largest dimension is 100 pixels.

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