Site Admin Training Document

12/14/2016

Once a Site Admin logs-in, you will notice that in addition to the Create Content drop down Menu and the Tabs across the top center right area of the page, you will see a Black Menu Bar at the top of the window. These menu options are for Site Admins only.

1. <u>User Accounts, Permissions and Generating a User List</u>

To create a user account…

1. Go to Admin Bar People, then click on Add User
2. Enter a unique username such as "bsmith" best to use a consistent format for all users
3. Enter a unique email address for the person you are creating the account for
4. Leave the password field blank and a random password will be created
5. Checked the "Notify User of New Account" the system will send an email to the person with login information.

After adding the person, you will now want to grant them permission to update the website

1. Go to the department or board/committee you want to assign the person permission for
2. Click the "Group" tab then click "Add people"
3. Enter the Username (e.g. bsmith)
4. Place a check in the appropriate checkbox to assign permission, VTS Typically recommends Group Admin to allow an individual to create new and update existing content.
5. Click "Add users" button at the bottom

This will give them permission to perform updates for the department, board or committee you are current accessing. If you want to give them access to other departments, boards or committees you will need to go to those homepages and repeat the process.

If you want to give someone Site Admin access like you have you must contact VTS Customer Support at 978-461-5895 or email support@vt-s.net.

You have the option of generating a list of users and then downloading the list to a csv file, which can then be loaded into excel. To generate the user list

1. Go to the Admin Bar People, then Select Downloadable User List
2. Once the list displays scroll to the bottom and click the "CSV" button
3. A CSV file will be created and down loaded

In the user list you may see a number of User Ids that you do not recognize. These belong to the VTS content developers and support staff that provide assistance. Best not to Block these from accessing the website. If you have questions on a specific user Id contact Customer Support at 978-461-5895

2. Department, Board, Committee Pages

To Create a Department, Board or Committee…

1. Go to the Admin Bar Content option, then Add content, then select Department/Board Home Page.

   ****You must perform a minimum of 3 actions to create a page****

2. First add the Department or Board name to Title box
3. Next, click General Information tab and check Department or Board checkbox
   - If it is a Board then enter the Name of Board into “Title when listed as a Board” box
4. Finally, click on Navigation Settings tab, place a check in the “Provide a menu link” checkbox
5. Enter name that you want to appear in the navigation in the “Menu link title: “ field,
6. Open the “Select parent item for link title” drop down box and select the location for this link to be placed under. For example, Department, Boards & Committees, or Government.
7. Click Save and Close.

The Department/Board homepage has now been created and remaining information can be updated by going to the page and clicking on the EDIT tab. Remember if a specific person other than a Site Admin will be editing the page you will need to set the permissions.

Department Pages have a Revision Publishing feature which allows you to revert to a previous version of the webpage. It maybe useful in the event an error is made updating the department page. To Revert to a previous page…

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

3. <u>Menus</u>

When accessing the Main Menu always use extreme caution if you are unfamiliar with how to change things in this menu. Please do not start to drag and drop menu items around. Contact VTS Customer Support for specific instructions or questions before making any changes.

Citizen Action Center, Resources, etc… menus can be updated by…

1. Go to the Admin Bar Structure, then click on Menus
2. Click on "List Links" under the operation column for the Citizens Action Center

To Add a Button….

1. Click Add link over Menu Link title
2. Enter the name of Button to be displayed on Homepage under "Menu link title"
3. Enter URL/link into the Path field
4. Make sure Parent link shows "Citizen Action Center"
5. Click Save button at the bottom of page.

To Edit a Button…

1. Click Edit under the Operations column
2. Update the name of Button displayed on Homepage under "Menu link title"
3. Update the URL/link in the Path field
4. Make sure Parent link shows "Citizen Action Center"
5. Click Save button at the bottom of page.

In some cases, there is an alternative method available for editing homepage menus. Place the cursor in the top right corner of the menu box and a gear will appear. Click on the gear and select links …

1. Place the cursor in the top right corner of the menu box and a gear will appear.
2. Click on the gear, then click on "List Links"

To Add a Button/Link...

1. Click Add link over Menu Link title
2. Enter the name of Button to be displayed on Homepage under "Menu link title"
3. Enter URL/link into the Path field
4. Make sure Parent link shows "Citizen Action Center"
5. Click Save button at the bottom of page.

To Edit a Button/Link…

1. Click Edit under the Operations column
2. Update the name of Button displayed on Homepage under "Menu link title"
3. Update the URL/link in the Path field
4. Make sure Parent link shows "Citizen Action Center"
5. Click Save button at the bottom of page.

Mega Menus are those menus that open as you pass the cursor over the top navigation item listed on the main website homepage. Mega Menus that utilize Custom Content Panes, can include About Us, Business, Resident, Find It Fast, Where Do I Go For, etc…

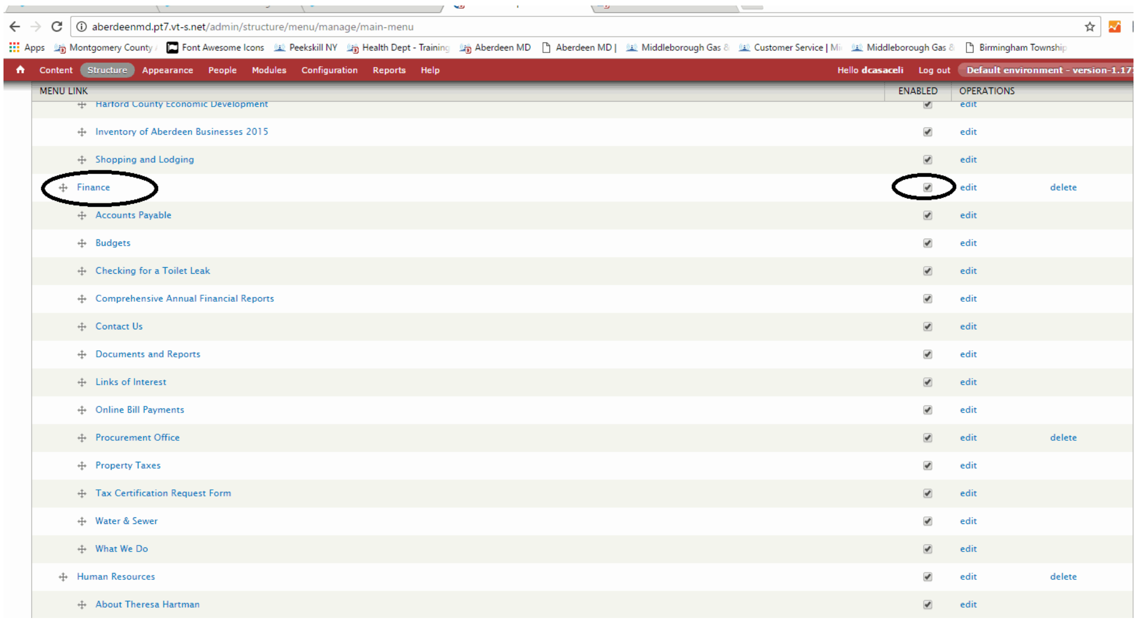
1. Go to the Admin Bar Structure, click on “Customer content panes”
2. Identify the appropriate menu and column that you want to change.
    - For Example, mega_menu_businesses_column1 references the Businesses mega menu and specifically Column1 of the mega menu
3. Click the Edit link at the end of the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

Mega Menus for Department, Boards or Committees - Main Menu

Certain Departments, Boards and Committees Mega Menus are updated from the Main Menu. Always use caution when updating the Main Menu.

1. Go into Structure, click Menus, then click “list links” under Operation column on the row for Main menu
2. Once the Main menu displays you will need to scroll down to until you see the desired Department, Board or Committee entry in the menu.
3. To remove an entry from the Mega Menu, uncheck the Enable checkbox at the end of the row. Remember just do this at the department, board or committee entries. Do not remove check from the menu entries underneath the department, board or committee entries
4. To add an entry back to the Mega Menu, place a check in the Enable checkbox at the end of the row. Remember just do this at the department, board or committee entries.
5. After each update you need to click Save button at the bottom of the page

See example below



Quick Links are typically those links listed to the left side of the homepage or sometimes in a Tab in the center section of the homepage.

Homepage Quick Links can be change by…

1. Click the Edit tab on the homepage
2. Once in edit mode scroll down to locate the Quick Links Section
4. Enter a Title and URL/link
5. You also have the option to Open the URL/link in New Window by placing a check in the checkbox
6. Then click Save and Close

4. Background Images and Masthead Slideshows

Some website homepages have Site Background images that can be replaced or additional images added

To add a new one

1. Go to the website homepage and click Edit
2. Click the Site Display tab
3. Locate Site Background Section
4. Click Choose File, select desired image and double click on it
5. Then Click Save and Close

To replace an existing image

1. Go to the website homepage and click Edit
2. Click the Site Display tab
3. Locate Site Background Section and image you want to replace, then click the Remove button to the right.
4. Next, Click Choose File, select desired image and double click on it
5. Then Click Save and Close

Note the background image size requirements in the Site Background Image section.

Some website homepages have Masthead Slideshow images that can be replaced or additional images added

1. Go to the Admin Bar click on Content menu option
2. Use "Show only items where" to filter on Slideshow/Gallery content type
3. Look for the Home Masthead Slideshow, then click edit

To add a new one

4. Scroll down to the Slideshow Images section until you see the "Add a new file" button.
5. Click the Choose Files button, locate the image on you PC, then double click on the image you want to upload
6. Repeat step 5 if you want additional ones
7. Always remember to place a description in Alternative text box
8. Save and Close

To replace an existing image

4. Scroll down to the Slideshow Images section until you see the image you want to replace and click the remove button to the right
5. Click the Choose Files button, locate the image on you PC, then double click on the image you want to upload
6. Always remember to place a description in Alternative text box
7. Save and Close

5. <u>URL Redirects</u>

URL Redirects allow you to make a simple url link to a long url string. For example, when someone enters "anytown.vt-s.net/recycle" it will go to the url "anytown.vt-s.net/DPW/Recycling-department" This allows you to use the shorter version in mailings or other websites.

1. Go to the URL bar and enter "/admin/config/search/redirect" after the domain (e.g. **anytown.vt-s.net/** admin/config/search/redirect")
2. Click Add Redirect
3. In the From field put the name of the shortened path to be entered in the url (e.g. "recycle")
4. In the To field put the full url to the webpage on the website (e.g. "anytown.vt-s.net/DPW/Recycling-department")
5. Click Save at the bottom

6. <u>Generate List of Email Addresses from Subscribers</u>

To generate a list of all Email Addresses subscribed to mailings on your E-Subscriber or Notify Me webpage.

1. Append the "/subscribe/report" to the domain displayed in the URL (e.g. <u>http://anytown.vt-s.net/subscribe/report</u>)
2. To export to MS Excel, scroll to the bottom of the page, then click the XLS button to download the file

7. <u>Calendar Color Coding</u>

Entries in the calendar can be color coded based up on the department, board or committee. To implement this …

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

8. <u>Person Profile</u>

Add a name to a Department, Board or Committee webpage with no email address

First make sure that a Person Profile doesn't already exist.

1. Go to the department or board the person is to be added to

2. Click the Edit tab and go to the “Key Contacts – Key Contacts, Board Members, Staff Members” tab

3. Type in the last name of the person into the Board Members or Staff Contacts field where you would like to add the person into. People may have entered the first name differently (Walter vs Wally) so the last name should match easier.

4. Review the questions below to determine the appropriate next step based upon results from step 3

If the name of the person appears in the pop up display box they already have a profile, simply select the name, then click Save and Close.

If the name of the person does NOT show up in the pop up box, then you will need to create a Person Profile for them. Follow these steps to create a new Person Profile:

1. Cancel out of the Edit mode you are currently in
2. In the left sidebar click Create Content and select Person Profile
3. Fill in the First and Last Name then Phone Number
4. Click on the Department or Board Memberships tab on the left side
5. Select the Department or Board from the drop down,
6. Enter appropriate Job Title
7. Click the Active Membership under Membership status.
8. Click Save and Close

After saving the page the person should show up in the staff or board table with an "edit" link next to their name. You can then edit that person to add or change information.

If you want this person to receive email via the website, contact form then you will need a user account setup (User Account setup describe item 1 of this document) Account setup. Contact you Site Admin to create an account. Once the account is created follow these steps.

1. Go to the Department or Board page where the person is listed in the Staff or Board Table.
2. Click the edit link next to the name of the person. If not present, contact your site Admin for assistance.
3. Enter User Id in to the “Username for receiving Email”
4. Click Save and Close

Remove a Person from a Staff or Board Table

1. Go to the Department or Board page where the person is listed in the Staff or Board Table.
2. Click the edit link next to the name of the person. If not present, contact your site Admin for assistance.
3. Click the remove button in the section associated with the role.
4. Click Save and Close

If you need assistance with performing Site Admin Activities for any of the items describe please contact our Customer Support group at 978-461-5895.