Rochester Institute of Technology

Finance and Administration

Drupal 7 Training Documentation

Written by:

Enterprise Web Applications Team
Upload Files ............................................................................................................................................. 16
Add Employee to Directory ..................................................................................................................... 18
Create a form .......................................................................................................................................... 18
Adding Components ............................................................................................................................ 19
Common Components: ........................................................................................................................ 19
Set up email addresses ........................................................................................................................ 22
Set up form Settings ............................................................................................................................ 24
Editing Content ............................................................................................................................................ 27
Edit a Page ............................................................................................................................................... 27
Add a PDF to a page ................................................................................................................................ 27
Update a PDF/Document that already exists .......................................................................................... 30
Update an image that already exists ....................................................................................................... 31
Update an Employee that is in the directory .......................................................................................... 31
Add a link ................................................................................................................................................. 32
**WORKFLOW**

Workflow is the pattern of how the edits, deletions, and creation of content will flow through a department. There are three roles that will have access to make changes to a site:

**Contributor** – This person will be able to edit and create new content.

**Approver** – An Approver can approve the changes the Contributor makes. This person will also be able to edit and create new content.

**Publisher** – This role will publish the changes made by the Approver or Contributor. Publishing means making the changes live for public viewing on the department’s site. Publishers will also be able to edit content, create new content, and approve changes.

For the workflow to work properly, each role must change the Moderation State to complete their responsibility. Each time the state is changed, the next person in the workflow will receive an email indicating they have an action to make. There are four moderation states:

**Draft** – The content is in the process of being edited.

**Needs Review** – The content has been edited and is ready for review and approval.

**Approved** – The content has been reviewed and approved and is ready to be published.

**Published** – The content has been published and is now able to be seen by the public.

**EXAMPLE OF HOW THE WORKFLOW WORKS**

A **Contributor** makes content changes to a page. Once their changes are made, they click “Save.” On the next page, they can review the change they made. If they need to make more changes, they can click the “Edit draft” tab and continue making changes. Each time they save their changes they will be directed back to the “View Draft” page to review them. When they are happy with their change, they must change the Moderation State to “Needs Review” by clicking “Apply.” Changing the state will ensure that the change is pushed to the next responsible person to approve it.

Once the Moderation State is changed to “Needs Review,” the **Approver** is sent a notification e-mail stating that “content needs review and approval.” There will be a link in the e-mail for the Approver to click on. They will be prompted to sign in to the site and directed to the draft page that needs approval.
The Approver has three options:

1) **Approve the change** – The e-mail link will take them directly to the draft of the page that needs approval. The Approver should make sure the Moderate drop down menu says “Approved” and click “Apply.” This will trigger an e-mail to be sent to the Publisher so that they know the content is ready to publish.

2) **Put the page back to “Draft” state** – Click the drop down next to Moderate and select “Draft” and click “Apply.” This will trigger an e-mail to be sent to the Contributor stating that more edits need to be made. The Approver should contact the Contributor directly to discuss the extra changes that need to be made. *The Approver might do this if they would like the contributor to make additional content changes.*

3) **Edit the draft** – Click the “Edit Draft” tab, make more changes to the page, and click “Save.” If the moderation state is kept as “Needs Review,” the Approver will receive another e-mail that the content needs approval. The Approver can then approve the content by changing the Moderation state to “Approved.”

Once the moderation state is set to “Approved,” an e-mail will be sent to the **Publisher** notifying them that “content is ready to be published.” There will be a link in the e-mail for the Publisher to click on. After clicking the link, they will be prompted to sign in to the site and directed to the draft content that needs to be published.

The Publisher has the same options as the Approver, as well as the ability to publish changes.

**Publish Changes** – The e-mail link will take them directly to the draft of the content that needs to be published. If they are ready to publish the content, they should make sure the Moderate drop down menu says “Published” and click “Apply.” This will move the new content to production so it is viewable by the public. It will also send an e-mail to the Contributors, Approvers, and Publishers for that site so everyone is notified of the new change.

*A Publisher has the ability to promote content directly from “Needs Review” to “Published.”

**LOGIN AND LOGOUT**

To log in, find the “Login” link at the top of the web page. Use your RIT user name and password to log in.

To log out, find the “Log out” button at the top right corner of the web page. It will turn red when you hover your cursor over it. After you have logged out, refresh your browser.
UNDERSTANDING THE STATE OF A PAGE

PUBLISHED AND CURRENT

This shows that the page you are looking at is current and published. The tabs give you the options to make a new draft or moderate.

**New draft** allows you to make changes to the contents of the page.

**Moderate** allows you to view the past changes that have been made to that page. Depending on your role, you may be able to change the moderation state from this tab.

**View published** shows you the current page that the public is able to see.

PUBLISHED AND NOT CURRENT

This shows you that the page you are looking at is published, but it is not the most current draft. This means that there has been a change made to this page that has not been published yet. You will also notice there is an extra tab.

**View draft** appears when there has been a change made to that content and it is in the middle of the workflow process. You can click on that tab to see what changes have been made.
By clicking on the “View draft” tab you can see that this draft page is in the “Needs Review” state and it is the most current draft. This page is not publicly viewable until it is published.

Since the Approver and Publisher can approve pages, they both have the Moderation Status drop down menu. They can select “Approved” from the drop down and click the Apply button.

This draft has been approved and is waiting to be published. It is not publicly viewable yet.
This draft has been approved and is waiting to be published. It is not publicly viewable yet. Since the Publisher has authority to publish, this role has a drop down menu to change the moderation state and publish this draft to be publicly viewable.

After the content has been published, the “View draft” tab will no longer be displayed.
Here are some tips that will make your life easier when making changes to your Drupal site.

### Getting Rid of Extra Spacing When Adding Content

- **Pressing Enter** will add a new paragraph and a blank line between the two paragraphs.
  
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. --extra spacing for new paragraph--

  Duis autem vel eum iure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis elefet option congue nihil imperdiet doming id quod maximus placerat facer possim assum. Typi non habent cliantatem insitam, est usus legentis

- **Pressing Shift + Enter** adds a new line with no extra spacing.
  
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. 

  Duis autem vel eum iure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis elefent option congue nihil imperdiet doming id quod maximus placerat facer possim assum. Typi non habent cliantatem insitam, est usus legentis

### Icons

- Spell Check as you type. A drop down will appear by clicking this icon, select “enable SCAYT”.

- Add a link

- Add an image to your content

### Can’t See the Updated Document/Image

If you update a document, you may notice that when you go to its link, it is still displaying the old version of the document. This happens because your browser saves the old version in memory. This is called caching.

To view the newest version that you have just uploaded, you may need to **hold down the Shift button and refresh your browser**. This will force the browser to reload the file from the server instead of from its memory.
Each role and site may have a different Options menu so some of these options may not be available to you based on your role or site.

The menu, regardless of your role, will be located across the very top of the page. Hovering your cursor over the links in the menu bar will trigger additional drop down menus, allowing for shortcut navigation.

**OPTIONS – CONTRIBUTOR VIEW**

![Options Menu - Contributor View](image)

**OPTIONS – APPROVER/PUBLISHER VIEW**

![Options Menu - Approver/Publisher View](image)

**Approvers/Publishers only** — A list of useful shortcut links will be available to you upon hovering your cursor over the “F&A Admin Functions” menu item in the top left corner, as you can see below. This means you can create basic pages, add slideshow images, upload files, etc. without having to open “My Workbench” all the time.
My Workbench allows you to view all of the content that has been created in the site, check the pages you have edited and the drafts you have created. Depending on your role, you can approve and publish changes from My Workbench as well.

Click on the “My Workbench” link in your menu bar.

To the right, you will see the “My Edits” table. It shows the past five pages you have edited. If you want to see all of the edits you have completed, click the “view all” link under the table, or the “My Edits” link at the top left of the table.

My Edits

Five of the most recently updated pieces of content.

<table>
<thead>
<tr>
<th>Title</th>
<th>Section</th>
<th>Type</th>
<th>Published</th>
<th>Last updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Vice President</td>
<td>Workflow</td>
<td>Basic page</td>
<td>Yes</td>
<td>1 hour 57 min ago</td>
</tr>
<tr>
<td>Signatory Authority</td>
<td>Workflow</td>
<td>Basic page</td>
<td>Yes</td>
<td>1 day 5 hours ago</td>
</tr>
<tr>
<td>Ethics and Compliance Hotline</td>
<td>Workflow</td>
<td>Basic page</td>
<td>Yes</td>
<td>2 days 3 hours ago</td>
</tr>
<tr>
<td>Strategic Direction</td>
<td>Workflow</td>
<td>Basic page</td>
<td>Yes</td>
<td>2 days 3 hours ago</td>
</tr>
<tr>
<td>Organization Chart</td>
<td>Workflow</td>
<td>Basic page</td>
<td>Yes</td>
<td>2 days 3 hours ago</td>
</tr>
</tbody>
</table>

view all
The bottom part of the page shows the “All Recent Content” table. It lists the ten most recently published pages on the site. You can view all of the content on the site by clicking the “view all” link at the bottom of the table.

<table>
<thead>
<tr>
<th>Title</th>
<th>Section</th>
<th>Type</th>
<th>Author</th>
<th>Last updated</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Vice President</td>
<td>Workflow</td>
<td>Basic page</td>
<td>webteam</td>
<td>1 hour 57 min ago</td>
<td>edit</td>
</tr>
<tr>
<td>A Message from Dr. James H. Watters</td>
<td>Workflow</td>
<td>Slideshow Image</td>
<td>webteam</td>
<td>4 hours 46 sec ago</td>
<td>edit</td>
</tr>
<tr>
<td>Signatory Authority</td>
<td>Workflow</td>
<td>Basic page</td>
<td>pmrsl</td>
<td>1 day 5 hours ago</td>
<td>edit</td>
</tr>
<tr>
<td>Ethics and Compliance Hotline</td>
<td>Workflow</td>
<td>Basic page</td>
<td>pmrsl</td>
<td>2 days 3 hours ago</td>
<td>edit</td>
</tr>
<tr>
<td>Strategic Direction</td>
<td>Workflow</td>
<td>Basic page</td>
<td>pmrsl</td>
<td>2 days 3 hours ago</td>
<td>edit</td>
</tr>
<tr>
<td>Organization Chart</td>
<td>Workflow</td>
<td>Basic page</td>
<td>webteam</td>
<td>2 days 3 hours ago</td>
<td>edit</td>
</tr>
<tr>
<td>Contact</td>
<td>Workflow</td>
<td>Basic page</td>
<td>pmrsl</td>
<td>5 days 51 min ago</td>
<td>edit</td>
</tr>
<tr>
<td>Sustainability at RIT</td>
<td>Workflow</td>
<td>Basic page</td>
<td>lratts</td>
<td>5 days 54 min ago</td>
<td>edit</td>
</tr>
<tr>
<td>University Financial Transparency</td>
<td>Workflow</td>
<td>Webform</td>
<td>lratts</td>
<td>5 days 1 hour ago</td>
<td>edit</td>
</tr>
<tr>
<td>Code of Ethics</td>
<td>Workflow</td>
<td>Basic page</td>
<td>pmrsl</td>
<td>5 days 1 hour ago</td>
<td>edit</td>
</tr>
</tbody>
</table>

**CREATE CONTENT TAB**

This tab lists the different content you can create. Clicking one of the options will lead to a new page that lets you create that content.
MY SECTIONS TAB

This tab shows you what sections your user name is associated with. The only section available is Workflow.

MY DRAFTS TAB

This tab shows you all of the drafts you have created, along with some information about them.

NEEDS REVIEW TAB

As an Approver or Publisher, you can review any content that needs your attention. The “Set moderation state” column enables you to change the state of content just by clicking the appropriate state in that column. You can also click on the title of the content to view it before you moderate it to the next state.
CREATE A NEW PAGE

1. Hover over “My Workbench” in your menu bar and click “Create content” from the drop down list.
2. Click on “Basic page.”
3. In the Title field, type in a title for the page. In the Body text field, type in the content you want to have appear on the page.
4. Do not change Text Format.
5. Do not change the Section.
6. Do not change Revision information.
7. URL path settings -
   a) Automatically Generate – Drupal will automatically generate a URL for you based on the title of your page. To use this option, keep the “Generate automatic URL alias” checked.
   b) Custom URL – You can assign a custom URL alias.
      ● Un-check the “Generate automatic URL alias” box
      ● Type only the end of the URL you want in the URL alias text box:
        example 1: the URL you want is http://www.rit.edu/sfs/test, type test into the box
        example 2: the URL you want is http://www.rit.edu/sfs/billing/test.html, type billing/test.html into the box
8. Click “Save.”
9. Review the page.
10. Change the Moderation State to “Needs Review” and click “Apply.”

CREATE AN FAQ (FREQUENTLY ASKED QUESTIONS) PAGE

1. Hover over “My Workbench” in your menu bar and click “Create content” from the drop down list.
2. Click on “FAQ Page.”
3. Type in a title for the page in the “Title” field.
4. The “Body” field is optional. If you had something in that area it will display at the top of the page.
5. Begin typing your question in the “Question” field and the answer to that question in the “Answer” area.
6. You can add more questions by clicking the “Add another item” button just below the form.

    Add another item

7. You can reorder your FAQs by dragging the multi-directional arrow up and down.

8. You may change the URL alias if you choose to by unchecking the “Generate automatic URL alias” box and typing your own into the URL alias box (See Step #8 from the previous section).

9. When you are done adding questions and answers, click “Save”.

    *This page will be created and published as soon as you click “Save”. Keep in mind that although it is published, it is not linked anywhere (until you link it) for users to get to easily. However, it still exists and is available.

ADD A SLIDESHOW IMAGE

    NOTE: Currently the site will only display three images so if you upload more than three, the site will display the last three images that have been uploaded.

1. Hover over “My Workbench” in your menu bar and click “Create content” from the drop down list.
2. Click on “Slideshow Image.”
3. Do not change the Section.
4. In the Image Title text box, type in a title for the image. *This title will display if the image does not load properly.
5. To search for the Slideshow Image you want to upload, click “Browse.” Then:
   a. Navigate to the image you want to upload.
   b. Click on the image.
   c. Click “Open.”
   d. Click the “Upload” button.
6. The URL text box is used for the URL that you want the user to go to if they click on the image. If you do not want the image to be a link, leave the URL box blank.

7. Set the weight if you want to control when an image displays in the slideshow. You can leave it at the default of 0 if you don’t have a preference.

8. Do not type a URL alias.

9. Click “Save.”

## UPLOAD FILES

You can use this option to upload one or more documents or images that you want to add to a page.

1. Hover over the “F&A Admin Functions” link in your menu bar, and click on ✂️ Upload Files.

2. A new window will open. This is your file browser.

3. Under the Navigation side, click on the folder that you want to put the file into.
4. Click “Upload.”

5. Click “Browse” or “Choose File,” depending on the browser that you are using.

6. Search for the file on your computer that you want to add, select it, and click “Open.”

7. Click “Upload.”

8. When it is uploaded you will see it appear on the right side of the screen highlighted in blue. Now the file you uploaded will be available for use throughout the site. You can now close the file browser.
ADD AN EMPLOYEE TO THE DIRECTORY

1. Hover over “My Workbench” in your menu bar and click “Create content” from the drop down list.
2. Click on “Employee Directory.”
3. Type in the information that you will use in the directory, not all information will be used. 
   *The information that you fill in will be used for the department staff directory and for personal employee pages.*
4. Do not change the Text format.
5. Photo – If the employee has a photo to display:
   a. Click “Browse” to search for the photo on your computer.
   b. Navigate to the photo and click “Open.”
   c. Click “Upload.”
6. URL path settings – make sure the “Generate automatic URL alias” box is checked.
7. Click “Save.”
   You will see a page where you can review the information you put in. You can click the “Edit” 
tab to make changes if you need to. The employee will then be automatically added to the 
employee directory.

CREATE A FORM

Only **Approvers** and **Publishers** have the ability to create forms. Creating a form can be complicated at first, but it is a great tool to have on your site. Below, you will find step-by-step instructions on how to create a form, in addition to some explanations on the form components.

1. Hover over “My Workbench” in your menu bar and click “Create content” from the drop down list.
2. Click on “Webform.”
3. Type in a Title for your new form.
4. Body – The body of the form will display at the top of the form. You can use this section to display information to the user about the form or just leave it blank. If it is left blank, nothing will appear above the form.
5. Do not change Text Format.
6. Do not change the Section.
7. URL path settings –
   a) Automatically Generate – Drupal will automatically generate a URL for you based on the title of your page. To use this, keep the “Generate automatic URL alias” option checked.
   b) Custom URL – You can assign a custom URL alias.
      • Un-check the “Generate automatic URL alias” box.
      • Type only the end of the URL you want in the URL alias text box:
        Example 1: the URL you want is [http://www.rit.edu/sfs/test](http://www.rit.edu/sfs/test), type test into the box
        Example 2: the URL you want is [http://www.rit.edu/sfs/billing/test.html](http://www.rit.edu/sfs/billing/test.html), type billing/test.html into the box
8. Click “Save.”
9. Add components. (See more information below)
10. Add e-mail addresses and configure e-mail settings. (See more information below)
11. When you are done, click the “X” button on the right side of the overlay menu.

**ADDING COMPONENTS**

Components are the different fields of your form. You have many options to choose from. Each component has a name, type, and the option to make it mandatory or not. You must click “Add” after you set up each component to be able to add another component.

Type in the name, select the type and click “Add.” The next screen is to set up that specific component.

*Each component will have specific fields to fill in to set up that component. Read the descriptions for each field to help you format your form.

**Label** – The name that will be next to the component in the form.

**Field Key** – This is created automatically; you do not need to change it. It is used by the computer.

**Default Value** – This is where you would enter a value that will display if the user does not enter data in this component. You can leave it blank.

**Description** – This is where you can add a description or any other specifics that you want the user to know about this component in the form.

**Label Display** – You can choose to have the label on the same line as your component (Inline), above the component (Above) or not display a label at all (None).

When you are done setting up that component, click “Save component.” Now you can add another component.

**COMMON COMPONENTS:**

**Date** – This allows the user to input a date. It has an optional calendar to choose the date from.

![Date Field](image)

(this is the description field for the date component.)
**E-mail** – This allows the user to input an e-mail address.

```plaintext
email
```

*email description field*

**Fieldset** – Fieldset behaves like a container. It will hold any other components that you put into it.

```plaintext
Fieldset
```

```plaintext
Date
```

```plaintext
Month ▼ ▼ ▼ Day ▼ ▼ ▼ Year ▼ ▼ ▼ ▼
```

*this is the description field for the date component.*

```plaintext
email
```

*email description field*

```plaintext
number
```

*number description field*

**How to set up a Fieldset**

The components you want to appear inside the fieldset container must appear indented under the Fieldset in the settings menu. To do this:

1. Click and drag the cross-directional icon, located next to each component, up/down to reorder each according to your preference, and position it under the Fieldset of your choice.

2. Once it is under the Fieldset, drag it slightly to the right to actually nest the component inside the Fieldset. To remove it from the Fieldset, slightly drag to the left.

<table>
<thead>
<tr>
<th>Label</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample fieldset</td>
<td>Fieldset</td>
<td></td>
</tr>
<tr>
<td>Full Name*</td>
<td>Textfield</td>
<td></td>
</tr>
<tr>
<td>E-mail Address*</td>
<td>E-mail</td>
<td></td>
</tr>
<tr>
<td>Message*</td>
<td>Textarea</td>
<td></td>
</tr>
</tbody>
</table>
File – This allows the user to upload a file in the form. You can choose what types of files the user can upload. This field looks different depending on the browser you are using.

Add a new file

Upload

(Internet Explorer)

Add a new file

Choose File No file chosen Upload

(Google Chrome)

Grid – This allows you to set up a table with options across the top and question on the left side. The user will select the answers to the questions.

<table>
<thead>
<tr>
<th>Grid</th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>what days do you work?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>what days is your weekend?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number – Use this if the only answer that can be input is a number. The user can type in a number or use the up/down arrows. When the form is submitted, it will check to be sure a number is in that box; no text is allowed. If you need text, use a textbox.

Number

3

Page Break – A page break allows you to split up your form into pages with next and previous buttons to navigate through your form. You can choose the wording on the buttons.

Page Break

Select Options – Select Options allows you to set up options for the user to choose from. This can be checkboxes or a pull down menu.
Textarea – Textarea gives the user a box to type multiple words into. This is good for a comment field.

Textfield – This gives the user space for one or two word answers.

Time – This allows the user to put in a time

SET UP E-MAIL ADDRESSES

When you have chosen all of the form components you want in your form, you can set up the e-mail options for your form. This will set up the e-mail address(es) that the form results will be sent to and allow you to format the e-mail that is sent. Click the “E-mails” link.

Type the address that you want to send the form information to in the Address box. Then click “Add”.

Address: email@example.com
Component value: E-mail Address
An “Edit e-mail settings” page will open. You can change the subject line of the e-mail, who the e-mail is from, and which e-mail address sent it.

- **E-mail header details**

  **E-mail subject**

  
  **Default:** Form submission from: University Financial Transparency

  **Custom:**

  **Component:** Full Name

  Any textfield, select, or hidden form element may be selected as the subject for e-mails.

  **E-mail from address**

  
  **Default:** w-fasvp@rit.edu

  **Custom:**

  **Component:** E-mail Address

  Any email, select, or hidden form element may be selected as the sender’s e-mail address.

  **E-mail from name**

  
  **Default:** Senior Vice President

  **Custom:**

  **Component:** Full Name

  Any textfield, select, or hidden form element may be selected as the sender’s name for e-mails.
You can also format the body of the e-mail in the E-mail Template section.

This section has a default template ready for you to view. There are some words that are placeholders for the information in the form that will change dynamically as the form is filled out and submitted.

%date – will display the date the form was submitted

%username – will display the username that signed in to fill out the form

%email_values – all values of the form that the user filled in

%submission_url – a url created each time a form is submitted that will contain the submitted information

--- E-mail template

An e-mail template can customize the display of e-mails.

Default template

Submitted on %date
Submitted by user: %username
Submitted values are:
%email_values

The results of this submission may be viewed at:
%submission_url

Token values

Included e-mail values

---

Scroll to the bottom and click the “Save e-mail settings” button.

**SET UP FORM SETTINGS**

Once the user submits the form, they can be directed to a confirmation page. You can set up the confirmation message to go on that page in “Form settings.” You can also set up the number of times a user can submit the form. You can also stop the form from accepting any more submissions.

Click “Form settings” in the top left of the overlay.
You can create your own confirmation message by typing it in the text area box. If you leave the box blank, a standard default message will appear when the form is submitted:

“Thank you, your submission has been received.”

You can control the number of submissions a user submits or how many total submissions a form receives by using these settings:

**Total submissions limit**
- Unlimited
- Limit to [ ] total submission(s) ever

Limit the total number of allowed submissions.

**Per user submission limit**
- Unlimited
- Limit each user to [ ] submission(s) ever

Limit the number of submissions *per user*. A user is identified by their user login global Webform settings.
You can close the use of the form and re-open it at a later date if you choose.

Status of this form

- Open
- Closed

Closing a form prevents any further submissions by any users.

When you are done making changes to the settings, click the “Save configuration” button.

Save configuration

When you have configured all of the settings for the form, click the “X” tab at the top, on the right.
EDITING CONTENT

EDIT A PAGE

1. Navigate to the page that you want to edit.
2. Click the “New Draft” tab.

![Image of New Draft tab]

3. Add/Delete/Edit the text on the page.
4. Click “Save.”
5. You can review your changes in the “View draft” tab.

ADD A PDF TO A PAGE

1. Navigate to the page that you want the PDF to be in.
2. Click the “New Draft” tab.
3. In the Body, type in the text that you want the PDF’s clickable link to be. If the text already exists, skip to the next step.
4. Highlight the text and click the link icon: ![Link icon]
5. Be sure that the Link Type is “URL,” and click the “Browse Server” button.
6. A new window will open up. This is your file directory. If your file is already in the file manager skip to step 7, otherwise follow the steps below to upload your document:
   a. Under the Navigation side, click on the folder that you want to put the PDF into.

   ![Image of file directory]

   b. Click “Upload.”

   ![Image of file directory after upload]

   ![List of file names]

   - 2011-2012SpecialInterestHousingApplication.pdf
   - CSI-Brochure-RIT.pdf
   - GVComplexMap2010.pdf
   - GV suites.pdf
   - ImportantDates2012-2013.pdf
   - RITInn_AlumParentsIncentive.pdf
   - RITInn_EmployeeIncentive.pdf
   - RoomInventoryInstructions_AptSuite.pdf
   - RoomInventoryInstructions_ResHalls.pdf
   - SpecialInterestHousingApplication.pdf
   - whattobring.pdf
   - whattobring_apt.pdf
   - whattobring_RITInn.pdf
c. Click “Browse” or “Choose File,” depending on your browser.

d. Search for the PDF on your computer that you want to add to the page, select it, and then click “Open.”

e. Click “Upload.”

![Image of file upload process]

f. When it is done uploading, you will see it appear on the right side of the screen highlighted in blue.

![Image of uploaded PDF]

7. Make sure the PDF you want to add is highlighted, and click “Insert file” from the top menu bar.
8. The address to the PDF will appear in the URL window. Click “OK.”

9. Click “Save.”

10. From the “View Draft” tab, click the link to test it and make sure the correct PDF appears.

**UPDATE A PDF/DOCUMENT THAT ALREADY EXISTS**

Use these steps if you want to replace a PDF or Word Document that is already on the site. By following these steps, you will save over the PDF or document that is already there, and it will keep the same name.

1. Navigate to the page you want the PDF to be in.
2. Click the “New Draft” tab.
3. Click on the text that is the link to the PDF/document you want to change, and click the link icon: 🔄
4. Click “Browse Server” – a new window will open up. This is your file directory.
   a. Under the Navigation side, click on the folder that you want to put the PDF/document/image into. *Make sure that you are putting the updated PDF/document into the SAME folder as the old PDF/document.*
   b. Click “Upload.”
   c. Click “Browse.”
   d. Search for the PDF/document on your computer, select it, and click “Open.”
   e. Click “Upload” at the bottom of the little window – after it has uploaded, it will replace the current PDF/document that was there. *The old and new PDF/document MUST have the same name!*
   f. Make sure the PDF/document you want to add is highlighted, and click “Insert file” from the top menu – the address to the PDF/document will appear in the URL window.
   g. Click the green “OK” button.
5. Click “Save.”
6. From the “View Draft” tab, click the link to test it and make sure the new PDF/document appears. *You may need to hold down the Shift button and refresh your browser to see your updated document.

**UPDATE AN IMAGE THAT ALREADY EXISTS**

Use these steps if you want to replace an image that is already on the site. By following these steps, you will save over the image that is already there and it will keep the same name.

1. Navigate to the page that you want the image to be in.
2. Click the “New Draft” tab.
3. Click on the image you want to change and click the image icon: ![Image Icon]
4. Click “Browse Server” – a new window will open up. This is your file directory.
   a. Under the Navigation side, click on the folder that you want to put the image into. *Make sure that you are putting the updated image into the SAME folder as the old image.*
   b. Click “Upload.”
   c. Click “Browse.”
   d. Search for the image on your computer, select it, and click “Open.”
   e. Click “Upload” at the bottom of the little window – when it is uploaded it will replace the current PDF/document/image that was there. *The old and new image MUST have the same name!*
   f. Make sure the image you want to add is highlighted, and click “Insert file” from the top menu – the address to the mage will appear in the URL window.
   g. Click the green “OK” button.
5. Click “Save.”
6. From the “View Draft” tab to ensure your changes took place.
   *You may need to hold down the Shift button and refresh your browser to see your updated image.

**UPDATE AN EMPLOYEE THAT IS IN THE DIRECTORY**

1. Navigate to the Content overlay using the menu bar at the top.
2. Select “Employee directory” from the Type drop down menu, and click the “Filter” button.
3. Scroll down to view the filtered table of employees, and find the name of the employee whose data you want to update.
4. Click the “Edit” link for that employee, located to the right under the Operations tab.

<table>
<thead>
<tr>
<th>Type</th>
<th>Author</th>
<th>Status</th>
<th>Updated</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Directory</td>
<td>pmrslsd</td>
<td>published</td>
<td>08/21/2015 - 10:55</td>
<td>Edit, Delete</td>
</tr>
</tbody>
</table>
5. Edit the information you need to modify as needed.
6. When you are finished, scroll down and click the “Save” button.

**ADD A LINK**

If you want to add a link to a new page that needs to be created, you have to create the page first, and then navigate to the page you want the link on and follow these steps below.

1. Highlight the text that you want to appear as a link.
2. Click the link icon:
3. In the “Link Type” drop down, choose the type of link you need to create:
   - **Internal Path** – this is used to link to a page within the same site. Start typing the title of the page you want to link to then choose the page from the list, then click “OK.”
   - **URL** – this is to link to an external URL. Choose “URL” from the Link Type drop down menu and type the external URL in the URL box, and click “OK.”
- **Link to anchor in text** – this is used to link to a section of the current page.

  There are two main steps to use this type of link.

  1. You have to add the anchor tag in the content of the page where you want the page to move to when you click the link.
     - Put your cursor right before the text on the page that you want the page to move to.
     - Click the Anchor button in the top tool bar.

     **Body (Edit summary)**

     ![Anchor Properties](image)

     - Type in a short name for your anchor in the Anchor Name box, and click “OK.”

     ![Example anchor icon](image)

     - You will see an anchor icon in the block of text where you placed your cursor.

     ![Example text](image)

     2. Now you can highlight the text that you want as the link, and click the link icon.

     **Body (Edit summary)**

     ![Example link](image)
- A Link window will open. Choose “Link to anchor in the text” from the Link Type drop down menu. Then choose the Anchor Name that you assigned from the “By Anchor Name” drop down list. Then, click “OK.”

![Link window screenshot](image)

- After you have saved the page, if you click on the text that you turned into a link, it should bring you to the spot on the page where you placed the anchor.
- **E-mail** – used to turn text into a clickable link that will launch your e-mail client window to compose a new message to that address.
  Select “E-mail” from the Link Type drop down list. In the “E-mail Address” field, type in the e-mail address that you want the e-mail to go to.
  The Message Subject and Message Body are optional. If you add text to those fields, that text will appear in every e-mail sent to that address using the link.

4. Click “Save” at the bottom of the page.
5. From the “View Draft” tab, click the link to test it.