

# Human Resources Website Drupal User Guide

## Logon

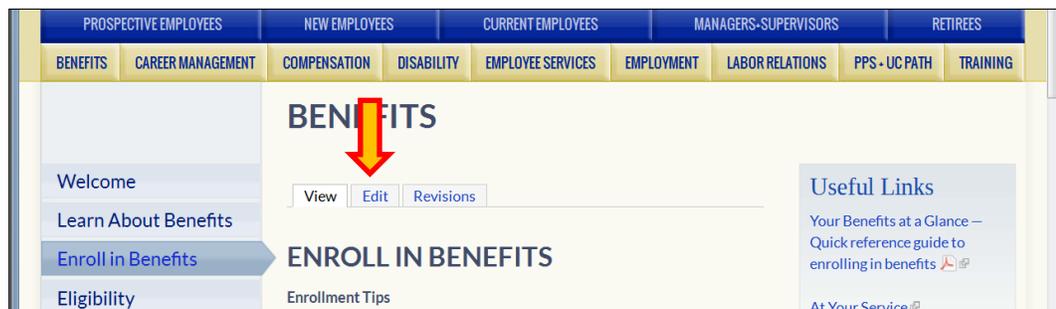
<http://www.hr.ucsb.edu/user>

You will be given a unique username and password for editing the website.

## Basic Tools – Quick Start

### 1. EDIT TAB on content page

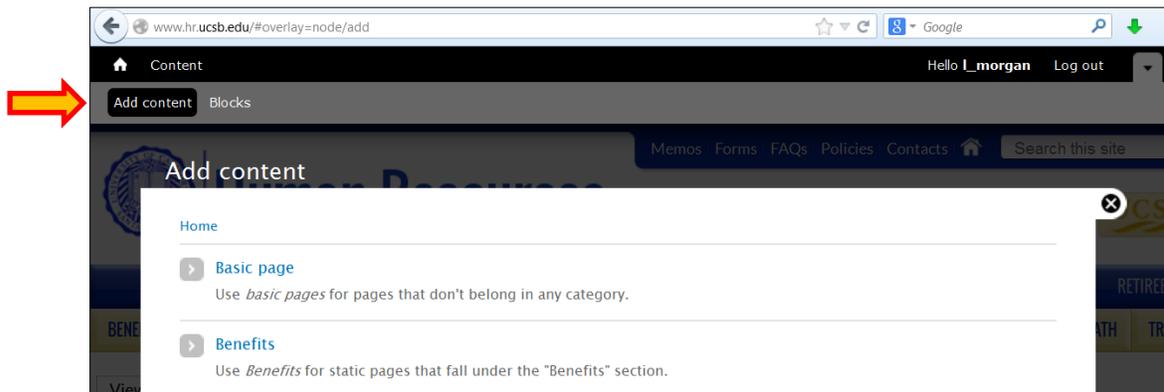
- Add or edit text in body of page, Useful Links, accordions.
- Add or edit links on body of page and Useful Links boxes
- Add documents (not forms) and link to content in body of page
- Edit Home Page News, Memo



### 2. Content Management Toolbar

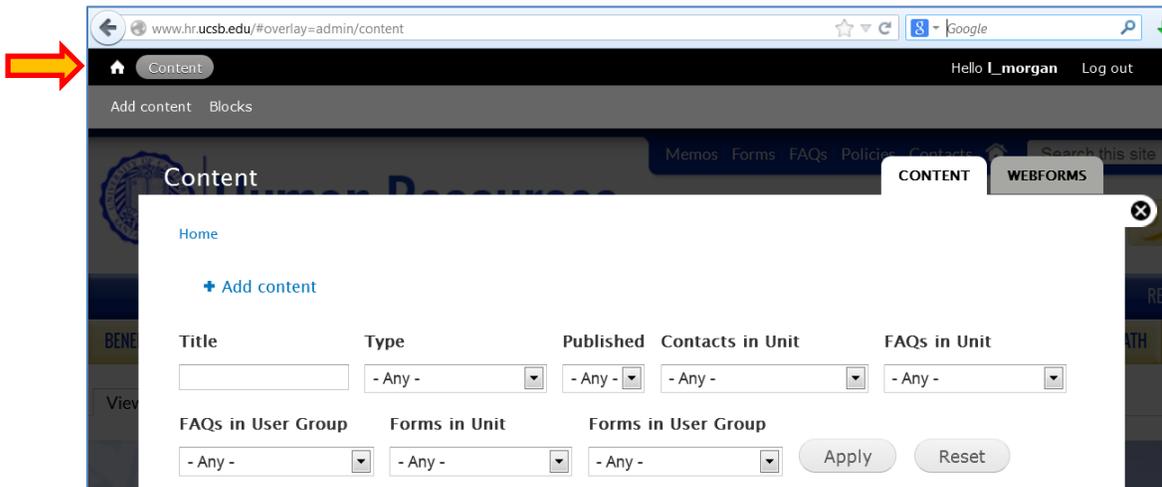
- **ADD CONTENT**

Add new forms, FAQs, Contacts, Memos, Events, Home Page News



- **CONTENT**

**Edit or change** forms, FAQs, Contacts, Memos, Events, Home Page News



## Structural Changes

Structural changes will **not** be made by HR staff as they require advance Drupal skills. Discuss these changes with the Section Owner.

- Adding pages and navigation buttons
- Adding or changing titles on big buttons
- Adding or changing images
- Adding Useful Links boxes
- Adding or changing accordions (?)
- Adding or changing categories for forms and FAQs
- Adding or changing Access Rights

## Roles and Responsibilities

- **Web Advisory Committee** – Advise on website updates or concerns. Authorize structural changes to website.
- **Owners** – Responsible for content on the designated section. Authorizes edits to content. Initiates request for structural changes.
- **Drupal Support Staff** – Edit content, add/update/delete forms and documents. Can make edits upon request or may have responsibility for subpage.
- **Structural Change Support** – Make major changes to structure of website such as adding/deleting pages, adding/deleting buttons, adding/deleting useful links boxes, changing images.
- **Manage Access Rights** – Manage Drupal ID for designated staff and the pages they are able to edit.

## Table of Contents

<b>Page</b>	<b>Topic</b>
<b>3</b>	<b>Content Pages</b> Text in the body of a page
<b>6</b>	<b>Forms</b> Documents that appear in the Forms pages
<b>9</b>	<b>Documents</b> Documents that are linked to text in the body of a page or a Useful Links box
<b>11</b>	<b>Useful Links Boxes</b> Links to documents, forms and other web pages. The box is located in the top right corner of most pages.
<b>13</b>	<b>Contacts</b> Contact information for staff and other organizations that appear on the Contacts pages
<b>14</b>	<b>FAQs</b> Questions and answers that appear in the FAQ pages
<b>15</b>	<b>Memos</b> Memos sent by HR to campus distribution lists

# CONTENT PAGES

## How to edit text in the body of content pages.

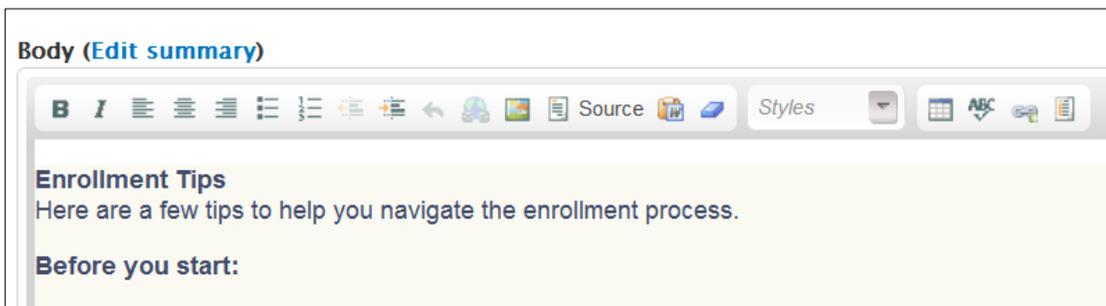
1. Go to the Topic/User page you wish to change. Select **Edit**.



2. **Body:** Edit the text in the Body field. Use the tool bar to format the text. There are standard styles and other formatting feature similar to Word.

If you have a large amount of text to add, you can create a draft in Word and then cut and paste it into the Body field.

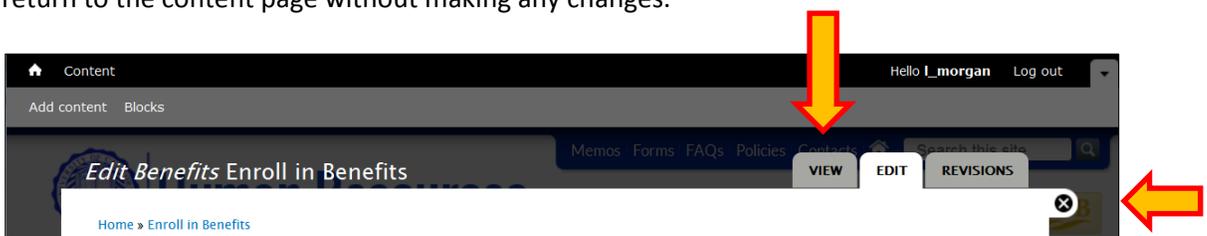
See note about **Accordions** in next section.



3. **Preview:** Scroll to the bottom of the page to select **Preview**. Preview allows you to see how the page will look before it is live on the website.

If you want to make more changes after previewing the page, scroll down past the preview of the text to the **Body** field.

4. If you decide you don't want to make changes after all, select **View or the close symbol** to return to the content page without making any changes.



5. **Save.** If you are happy with your changes scroll to the bottom of the page and select **Save.** Your edits will appear on the live webpage.

**Warning:** The Delete button at the bottom of the page will remove the page from the website page.

## Accordions

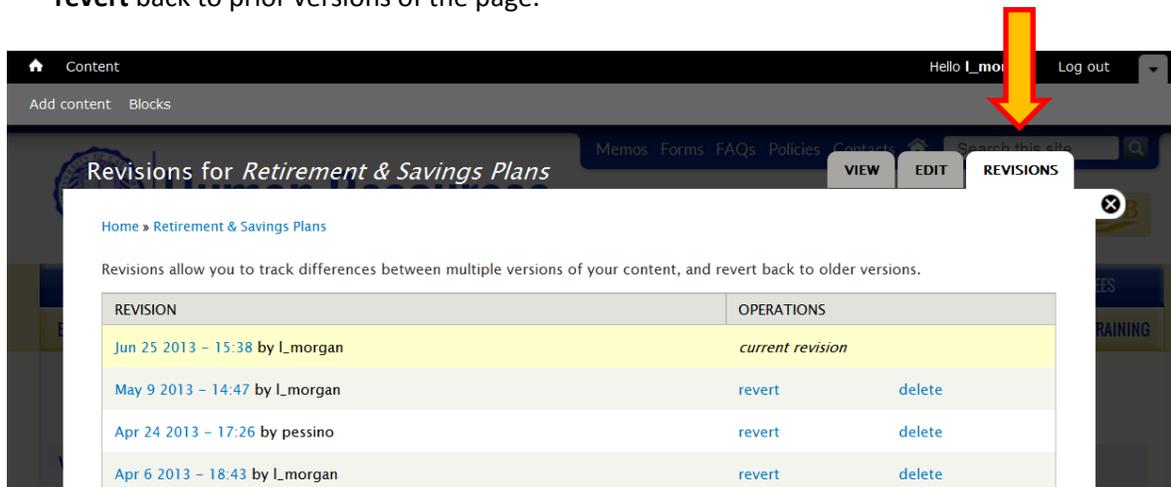
1. Editing accordions can be tricky. Formatting them is an intermediate skill.
2. In the **Body** field, Accordions look like titles followed by paragraphs of text. You must be familiar with the accordion title and text before trying to edit. It is easy to mistakenly disrupt the layout of the accordions. It is difficult to restore the layout.
3. You **cannot** copy and paste an Accordion.

## Tables

1. You can cut and paste a table from a Word document. You can also add a table using the Body toolbar.
2. Right click the table to access the table properties and to format, add or delete columns and rows.

## Revisions

1. The **Revisions** tab allows you to track differences between multiple versions or content and **revert** back to prior versions of the page.



Content Hello L\_morgan Log out

Add content Blocks

Memos Forms FAQs Policies Contacts Search this site

### Revisions for Retirement & Savings Plans

VIEW EDIT REVISIONS

Home » Retirement & Savings Plans

Revisions allow you to track differences between multiple versions of your content, and revert back to older versions.

REVISION	OPERATIONS
Jun 25 2013 - 15:38 by L_morgan	current revision
May 9 2013 - 14:47 by L_morgan	revert delete
Apr 24 2013 - 17:26 by pessino	revert delete
Apr 6 2013 - 18:43 by L_morgan	revert delete

# FORMS

## What constitutes a Form?

A document that appears on the main **Forms** page: (<http://www.hr.ucsb.edu/forms>)

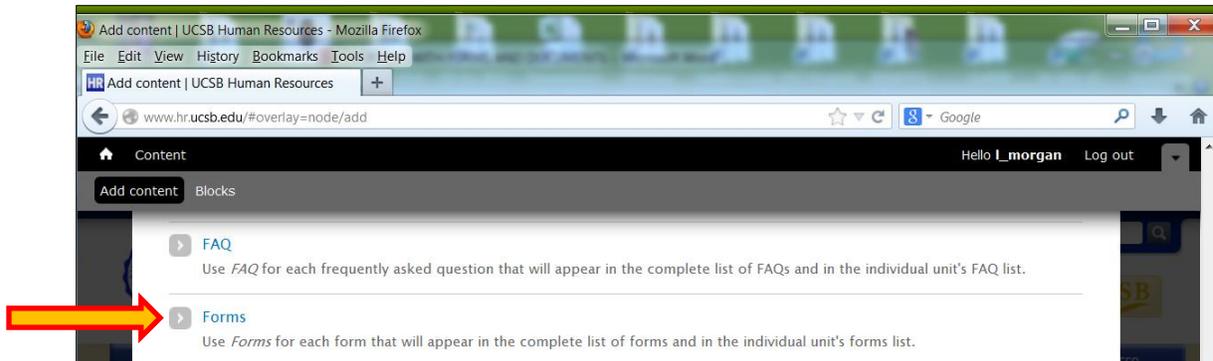
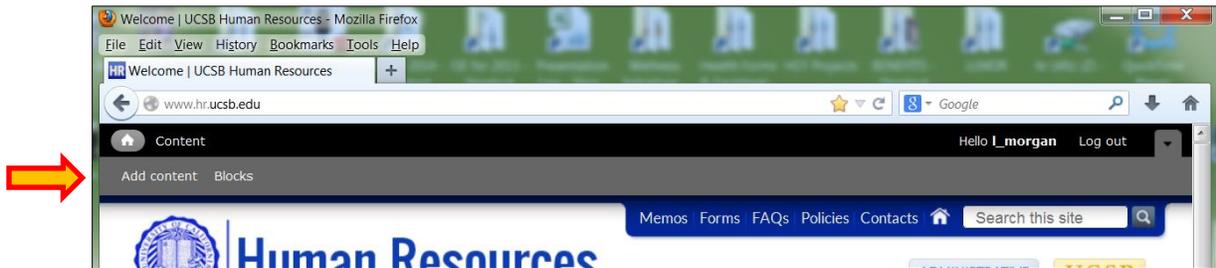
As well as the individual Topic and User **Forms** pages: (<http://www.hr.ucsb.edu/employment/forms>)

## Tips

- Use a **Title /Description** name that is meaningful and understandable to users
- Fill in exactly the same information in both the “Title” and “Description” fields when adding a form.
- Use **\_** between words in the **File** name of the form
- Add “form” to the end of File names when possible
  
- **Add/upload form first**; then link to the form from the Topic web page.
  
- **Common error:** Uploading a form into both the forms folder, and then adding it on to the actual FORMS page in Topic/User section –this creates TWO versions of the same document.
  
- If the file name is wrong – “Remove” the form and add/upload again.

## How to add/upload a form to the Forms pages

1. Go to **Add Content** , then scroll down to **Forms**



2. **Title:** Use a meaningful human-readable **Title** for the form. This is what you will use to find your forms in the **Content** list.
3. **Unit and User Group:** by ticking these checkboxes, your form will appear under the appropriate heading on the main forms list. It will also cause your form to appear in the individual unit forms pages.
4. **File:** Browse your computer to **Upload** your file. First make sure your filename is meaningful and descriptive, it is best if there are no spaces or use \_ between words in the filename.

**Description:** Once you upload the file, there will be a **Description** field. *THIS IS VERY IMPORTANT TO FILL OUT!* It is what appears on the website as a link to the file. Use *exactly the same name* in both the **Description** and the **Title** field so forms will appear in alpha order on the Forms pages.

5. **Title and Link:** Use this when the form is on another website. Enter the **Title** that you want to appear on the website as a link to the file. Cut and paste the address of the form in **URL**.
6. **Modifiable?** Indicate whether the form is a modifiable pdf or word document.
7. **Tags:** Enter descriptive keywords or phrases separated by commas to be used by the search feature.

If you have category headings in your unit's Forms page, you will need to tag the form with that category.

8. **Save.**

### How to replace a form using the same filename

1. Go to **Content**. You can filter either by **Type=Forms** or **Forms in Unit** or search by the **Title** of the form. Click **Apply**. Find your form and click on the **Title**, then click the **Edit** tab on the page.
2. Where it says **File**, click **Remove**. **Save**.  
*\*this is important so that when you upload your new version it doesn't append a number to the end of the filename.*
3. **Edit** the page again.
4. **Upload** your new file. Browse your computer to **Upload** your file. First make sure your filename is meaningful and descriptive, it is best if there are no spaces or use \_ between words in the filename.
5. **Save.**

### How to replace a form using a different filename

1. Go to **Content**. You can filter either by **Type=Forms** or **Forms in Unit** or search by the **Title** of the form. Click **Apply**. Find your form and click on the **Title**, then click the **Edit** tab on the page.

- Where it says **File**, click **Remove**. **SAVE**.  
*\*this is important so that the previous file gets deleted from the server.*
- Edit** the page again.
- Upload** your new file. Browse your computer to **Upload** your file. First make sure your filename is meaningful and descriptive, it is best if there are no spaces or use \_ between words in the filename.
- Save**.

*Note: If there are any links to this form on other website pages (besides the forms pages), you will need to correct those links by linking to the new filename.*

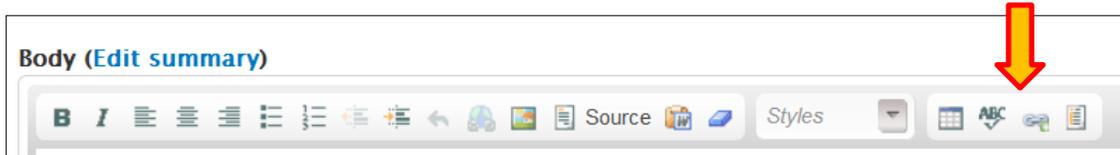
## How to link to a form in the body text of Topic or User pages

*Add/Upload the form before you link it to text on a Topic/User page.*

- Go to the Topic/User page that needs the link. Select **Edit**.



- In the **Body** text, highlight the words you would like to use as your link to the form.
- Click the “linkit” button which looks like a linked chain.



- Click **Open File Browser**.
- Click on the **Forms** folder so that it is bold.
- Locate your form, and click on it so that it is highlighted blue. Click **Insert File**. Then click **Insert Link**. **SAVE**.

# DOCUMENTS

## What constitutes a Document?

A document does NOT appear in the main Forms section or Topic/User Forms page.  
A document is linked to text in the body of a Topic/User page or Useful Links box.

## Tips

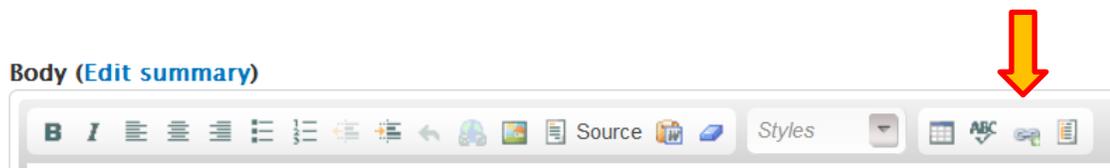
- Use a **File** name that is meaningful and understandable to users
- Use \_ between words in the **File** name of the document

## How to upload and link to a document (that you don't want to appear on the Forms pages)

1. Go to the Topic/User page that needs the link. **Edit** the page.



2. In the **Body** text, highlight the words you would like to use as your link to the form.
3. Click the “linkit” button that looks like a linked chain.



4. Click **Open File Browser**.
5. Click on the **docs** folder so that it is bold. Click on the directory you wish to upload the file into. (If you want to create a new directory inside of docs, make sure docs is bold, click the **Directory** button, type in the Subdirectory name and click **Add**.)
6. Click the **Upload** button. Click **Browse** to find the file on your computer. Click **Upload**. Click **x** on the little dialog box to close it.
7. Make sure the form you uploaded is highlighted in blue. Click **Insert file**. Click **Insert Link**.
8. **Save**.

## How to replace or rename a document in the docs folder

1. Go to the Topic/User page that needs the link. **Edit** the page.
2. In the **Body** text, highlight the words you would like to use as your link to the form.
3. Click the “linkit” button which looks like a linked chain.
4. Click **Open File Browser**.
5. Click on the directory where the document is located, click on the document so that it is highlighted in blue. Click **Delete**.

Now you can upload your new file (whether it has the same filename or different)

6. Click on the **docs** folder so that it is bold. Click on the directory you wish to upload the file into. (If you want to create a new directory inside of docs, make sure docs is bold, click the **Directory** button, type in the Subdirectory name and click **Add**.)
7. Click the **Upload** button. Click **Browse** to find the file on your computer. Click **Upload**. Click **x** on the little dialog box to close it.
8. Make sure the form you uploaded is highlighted in blue. Click **Insert file**. Click **Insert Link**. **Save**.

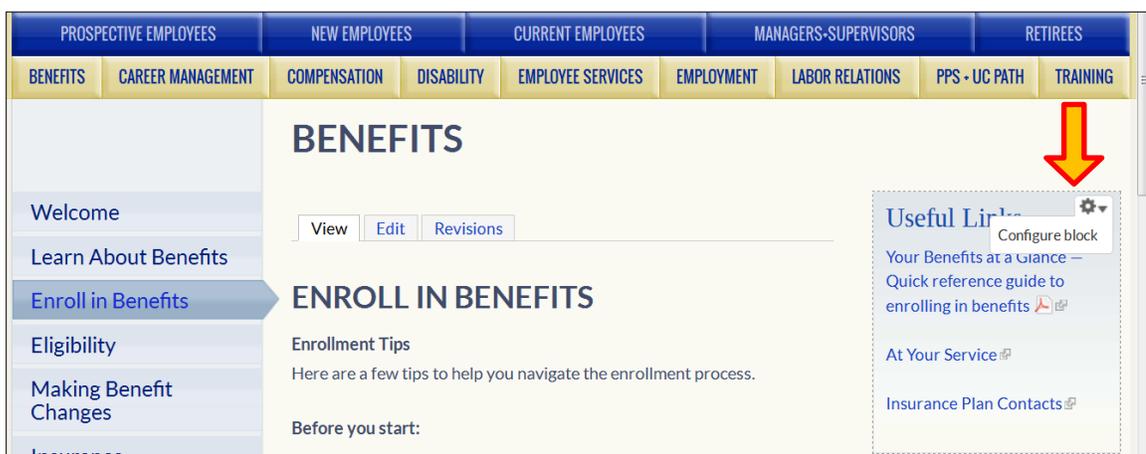
*Note: If you changed the filename, and there are links to that file on other pages of the website, those links will break. You will need to find them and correct them.*

## USEFUL LINKS BOXES

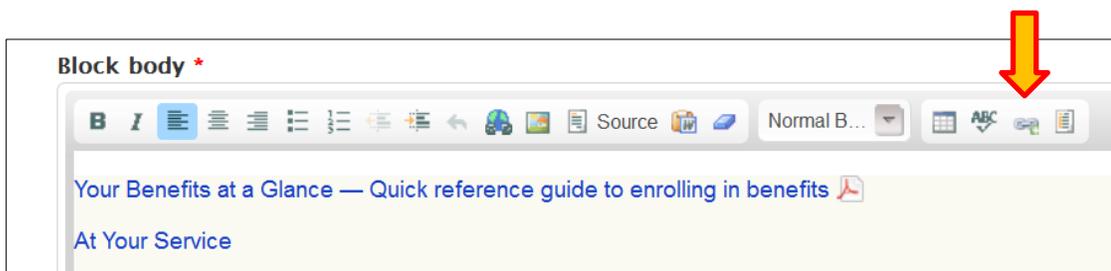
The content of existing Useful Links boxes can be edited.  
Adding a new Useful Links box is a structural change.

### How to edit a Useful Links box.

1. Go to the Useful Links box on the Topic/User page you wish to change.
2. Hover the cursor arrow over the top right corner of the box until the setting wheel appears. Click the **setting wheel**, click **Configure Block**.



3. **Block Body:** Type the text you want to appear in the box.



4. **Link to a document or form that is in the Content Manager:**

- Select the text in the **Block Body** that you want to link.
- Click the “**Linkit**” icon on the toolbar.
- Click **Open the File Browser**
- Click on the **docs** or **forms** folder so that it is bold. Click on the directory where document/form is saved. Select the document/form. Click **Insert File**.

(You can also upload a new document to the Content Manager at this time. See instructions on the DOCUMENT page of guide.)

- Click **Insert Link**.
- Scroll to the bottom of the page, select **Save Block**.

5. **Link to a document or web page on another website:**

- Copy the URL from the other site
- Select the text in the **Block Body** that you want to link.
- Click the “**Linkit**” icon on the toolbar.
- Paste the URL into **Target Site**.
- Click **Insert Link**
- Scroll to the bottom of the page, select **Save Block**.

# CONTACTS

## Adding Contacts

1. Go to **Add Content**, scroll to **Contacts**
2. **First and Last Name**  
Use last name field for organizations or non-employee entries.
3. **Unit.**  
If the employee is working in more than one unit with different responsibilities, make a separate record for each unit. The employee must be entered into the system once for each section they need to appear in. This is because their responsibilities are different for each section, and the rank may also be different.
4. **Department Title:** Enter employee's title
5. **Rank** – this is the order that the name will appear in the unit contacts. Unit managers can be 1, other employees are 2
6. **Responsibilities** – enter summary of duties  
Enter flex-work or part-time hours in this field.
7. Enter **phone, email**
8. **Save**

## Editing Contacts

1. Go to **Content**
2. Filter using “Contacts by Unit” pull down menus. Select **Apply**.

*There are not a Contact page in the User sections. All contact information is in the body of the text on the relevant page.*

3. Select the person whose information you wish to change, click **Edit** in the far right column.
4. Make changes.
5. **Save.**

## Deleting Contacts

1. Go to **Content**
2. Filter using “Contacts by Unit” pull down menus. Select **Apply**.
3. Select the person whose information you wish to delete, click **Delete** in the far right column

## FAQs

### Adding FAQs

1. Go to **Add Content**, scroll to **FAQs**
2. **Question:** Type or cut and paste the question. This question will appear as an Accordion in the FAQ sections of the website.

Make sure the question is complete and can stand alone.

“How do I enroll?” is not specific enough

“How do I enroll in Supplemental Disability?” is better

3. **Answer:** Type of cut and past the answer to the question.
4. **Unit and User Groups:** Check the FAQ sections in which this question will appear.
5. **Faq Tags:** Enter descriptive keywords or phrases separated by commas to be used by the search feature.
6. **Preview:** Preview allows you to see how the FAQ will look before it is live on the website.
7. **Save**

### Editing FAQs

1. Go to **Content**
2. Filter using “FAQs by Unit” or “FAQs by User Group” pull down menus. Select **Apply**.
3. From the lists of FAQs, Click **Edit** for the FAQ you wish to change.
4. Make changes.
5. **Revision log message:** Enter why change was made if it provides useful information for revision log.
6. **Save.**

# MEMOS

## Adding Memos

1. Go to **Add Content**, scroll to **Memos**
2. Fill in **title**, **date**, **year**, and **mailing list**
3. **Story**: Cut and paste the memo including the TO, FROM, and SUBJECT lines
4. **Save**

## Editing Memos

1. Go to **Memos** on home page navigation bar
2. Select the memo you wish to edit
3. Select **Edit** tab
4. Make changes
5. **Save**