Basic Drupal End-User Training Manual

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Logging In

To login in to the site to make changes, begin by opening a web browser and going to:

[www.yoursite.com](http://www.civicgovernance.ca/)/user

NB: This system can be accessed from any computer with an internet connection.

**If you forget your password:**

On the login page there is a tab called “request a new password”. You must enter your user name *or* your email address, and the system will send you a new password by email. If you enter your user name, it will send your password to the email address that the system has on file for you.

User Accounts, Permissions/Access Control

There are **[x]** main types of users for your Drupal website: **[list user roles]**. Each level of user has different permissions on the site, allowing them to access different parts of the site administration, and manage content.

**Anonymous:** this user is the general public, and is not logged in on the site.

**Member:** has the same access as an Anonymous user, and additionally can view content in the Members Area **[list members area URL].**

**Site Admin**: has the highest level of access, and can add/edit/delete all content, as well as manage things like menus, and user accounts.

New User Accounts

**Member Accounts:** Signing up for member accounts can be done by **[give instructions]** or by going directly to **[**[**http://www.yoursite.com/user/register**](http://www.yoursite.com/user/register)**]** which is the user registration page. [The new user will then be sent a confirmation email, with instructions that they *must* follow to activate their account. You do not need to approve their account manually.]

If a user loses their password, it can be reset through this same user page by entering and saving the new password and emailing it to them. If a Web Account user with an external email address loses their password, they can simply click on the “Request new password” tab on the login page.

Members Area

**[Provide instructions on logging into the Members Area.]** Once logged in, they will see a page that looks like this:

**[IMG]**

**[Provide instructions on how to navigate to the Members Area.]** There is also a “Log Out” link in this box.

The Members Area page looks like this:

**[IMG]**

**[ADAPT instructions on managing Member Area content to site.** The Members Area page is **manually updated**, which means that content does not appear here automatically. You must manually enter text and link it to the content that you have added for the Members Area. As a general rule, you will want to add content for this area by clicking the menu item Create Content  Member Content, as this content type will then be shown to logged-in members by default.

You will notice that the Members Area page (as well as other site pages) has a new tab labelled “Access Control”. This area is used to set which types of users are able to view, edit, and delete content. Because the different content types have been set up with default behaviours, you should not need to use this function.]

Overall Site Structure Review:

This manual was created to provide a reference point for administering different content related tasks on your website. There are several general types of site content on this website:

* Event
* Newsletter issue
* Page
* Story

In this type of website, which is a content management system (CMS), the terminology used to refer to each of those types of content is as follows:

**Event**

Events are entries that have a set start and end date, and which can be automatically archived from the live version of the site once the end date has passed. Events will appear on the Events page ([www.yoursite.com/event](http://www.yoursite.com/event)), and can also appear in a shortened form on the homepage or all pages.

**Newsletter Issue**

For creating and sending email newsletters through the website.

**Page** (Regular Content Pages)

These pages are single pages, that can have a link from the main menu and contain regular content. They may contain documents, images or just regular text, and must be manually translated if you have a multi-language site.

**Story** (Content as a page and in listings)

Stories display on their own individual pages, like a 'Page', but can also be automatically displayed in listings of groups of stories that are categorized by topic or other parameters.

Editing Site Pages

To edit a regular Page of your website:

* If you have added a menu item for this page, click the “Edit” tab at the top of the page
* Begin by logging in at [www.yoursite.com/user](http://www.bcfed.com/user/)
* You will now see a slightly different version of the site that introduces Editing tabs.

**[IMG]**

* To edit any page, you must navigate to the page you wish to make a change on, and click on the **“Edit” tab** at the top of the site content. Your view of the page will now change to look like this:

**[IMG]**

* To make a change to site content, place your cursor in the content editing window and make your changes.  
    
  *NB: You will see several formatting tabs at the top of this content editing window. These all function much like they do in a regular word processing program (like OpenOffice or MS Word), or if they require more detailed instructions are covered in later sections of this manual. These include:*

**[IMG]**

*Top Row (L-R):*

* Bold
* Italic
* Underline
* Left Justified Paragraph
* Centre Justified Paragraph
* Right Justified Paragraph
* Bullets
* Numbered Lists
* Remove Indent on Text
* Indent Text
* Undo
* Redo
* Link (for making links, covered in detail later in the manual)
* Remove Link (for removing existing links)
* Anchor Link

*Second Row (L-R):*

* Text Formatting Box (to choose paragraph, Heading 2, etc. styles)
* Style Formatting Box (for styling text, more detail later in manual)
* Insert An Image (covered in detail later in manual)
* Superscript
* HTML View (allows you to see the HTML code view)
* Insert Horizontal Rule

*Third Row:*

* Cut
* Copy
* Paste
* Clean up code tool
* Special characters
* Help
* Paste Word Content as Plain Text
* Insert A TableVarious Table formatting tools
* When you are done, you can click “Preview” at the bottom of the page to preview your change in the full site template.
* When you are satisfied with your change, click “Submit” to save your change.

Advanced Editing Options: Styling Text

Within the site content, a stylesheet has been developed that pre-defines various heading styles for use on your website. You can apply those heading styles to site content via the content editor, choosing from a “Format” drop down box which offers you six levels of headings:

* Paragraph: [list styles]

[Sample sentence in paragraph style.]

* Heading 1: **Not used inside content area.**
* Heading 2: list styles

[Sample sentence in h2 style.]

* Heading 3: list styles

[Sample sentence in h3 style.]

* Heading 4: list styles

[Sample sentence in h4 style.]

* Heading 5: list styles

[Sample sentence in h5 style.]

* Heading 6: list styles

[Sample sentence in h6 style.]



To set a heading style, select the line of text that you wish to make a heading in the content window, and then choose a style from the formatting drop down. Note that by default all regular text will be set as a Paragraph.

*NB: In order to set a heading style the line that is being given the style must be separate from the next paragraph, ie. you can’t give something a heading style in the middle of a sentence.*

Advanced Editing Options: Making Links

There are three different types of links you can add to a web page: email links, absolute links and relative links. Email links are links that go directly to someone’s email address, typically opening up an email client for the user to send a message to that address. Absolute and relative links refer to two different types of links that will take you from one page in a one website to a page in another, or from one page in a website to another within the same site. We will deal with absolute and relatives links first, offering more information about them below, and then will cover making email links.

**Absolute vs. Relative Links:**

Absolute link is a term that refers to links that go to other websites outside of [http://www.yoursite.com](http://www.yoursite.com/). To make absolute links work, they need a full prefix in front of them, for example: [http://www.yoursite.com](http://www.cbc.ca/) not just [www.yoursite.com](http://www.cbc.ca/) is required for that link to work. Often the easiest way to ensure that you have the correct URL for an absolute link (and don’t accidentally mistype something) is simply to copy the URL from the address bar of your browser to then paste it into the editing window (explained in detail below).

Relative links are links that go from one page of your website to another. So for example, you may wish to make a link from the About Us page to the Contact Us page. Relative links do not need the [http://](http:///) protocol in front of them, and in fact they do not even need the [www.yoursite.com](http://www.bcfed.com/), they need only the rest of the information from the URL. Where possible, we have tried to make the URLs for site pages on this site “human friendly,” meaning that they are intended to follow some logic, so for example:

About Your Site = about

Contact Us = contact\_us

*NB: For a relative link that is not the default page link (ie. /node/287), you must have defined the URL when you created the page or story, under the "URL path settings".  If you did not previously do this, you can go back to edit the page and define the URL path.*

**Some things to note:**

* URLs can never have spaces in them, so where we intend a space to exist a “ \_ “ is generally used.
* As convention, the URL paths are typically all lower case.

Where things can start to get a bit tricky is when you get to sub pages within a section, so for example:

About Us: News = about/news

Contact Us: Location: Map = contact\_us/location/map

What you’ll probably notice here is that the URL path becomes broken down by sub sections. So pages that live, for example, in the Media section have “media” and then a “/” before you get to the actual page name. The reasoning for this is that the website is built much like a folder structure on your harddrive, and all pages that are housed inside of Media Room, live in the Media Room folder. In order to set a link to a sub page of a top level section, you must first indicate what top level section (or folder) the page is in, ie. media\_room/, and then include the name of the page itself: media\_room/07\_news\_releases.

**To Make An Absolute or Relative Link:**

Follow the steps for Editing Site Pages up to and including Step Four [(pages 4-5)], then:

* With your cursor, highlight the text you would like to make into a link.
* You will now see the “Link” button on the editing window change from being greyed out to turning light blue, making it available to click on:  
    
    
    
  Click on the link button and a pop-up window will open up.  
    
  
* The pop-up window will look similar to this image above. To set the link you must first fill out the required boxes in the pop-up window. Start with the **Link URL** box where you will insert the link itself. Remember, **if it is a link to another website be sure to include the** [**http://**](http:///) before the full link.
* You can then choose the “**Target**” for the link, if you would like it to open in a new window. By default this box will stay at “Open in this window/frame” which is fine for all internal links.
* If you would like, you can also now set a Link Title, by filling in the **Title** box. The Link Title is not necessary but helps to increase the site’s accessibility giving extra information about where the link points to for users who are visually impaired and using screen readers. The Link Title should just be descriptive telling the user what link you are sending them to. So a link to a newspaper article may have a link title like: “Newspaper article on inequality in the workplace.” *This step is not required for your link to function, but falls under the category of best practices.*

**To make an Email Link:**

As above, follow the steps for Editing Site Pages up to and including Step Four (pages 4-5), then:

* With your cursor, highlight the text you would like to make into a link – in this case this will typically be an email address or someone’s name.
* You will now see the “Link” button on the editing window change from being greyed out to turning light blue, making it available to click on:  
    
    
    
  Click on the link button and a pop-up window will open up.  
    
  
* The pop-up window will look similar to this image above. To set an email link you need only pay attention to the first box: **Link URL**. To make an email link you need to start by entering “mailto:” followed by the email address. So for example a link to info@yoursite.com would look like: [**mailto:info@yoursite.com**](mailto:info@yoursite.com)
* You can now select Insert and your email link has been created.

**To link to an uploaded PDF file:**

As above, follow the steps for Editing Site Pages up to and including Step Four (pages 4-5), then:

* With your cursor, highlight the text you would like to make into a link – in this case this will typically be the name of a publication or document.
* You will now see the “Link” button on the editing window change from being greyed out to turning light blue, making it available to click on:  
    
    
    
  Click on the link button and a pop-up window will open up.  
    
  
* The pop-up window will look similar to this image above. To link to a document that you have already uploaded to the site, click on the little blue/red box to the right of the Link URL field. You will now see a list of all the images and PDF files that have been uploaded to the site:  
    
  
* Select the file you would like to link to, or use the “Browse” feature at the bottom of the page, to upload a new file. Click on the “add” link to the right of the file name and the file’s path will be added to the Link box.
* You can now choose whether or not the file should open in a new window (the convention with PDF documents is that they open in a new window). And add a title if you wish. You can then click the Insert button and your file link will have been added.

Advanced Editing Options: Adding an Image to a Page

Image formats for the web are somewhat restrictive. In order for an image to show up on the website, it must be saved as either a .jpg or .gif file and should be saved at the final size that you would like the image to display on the website.

In general, .jpg files are best for photographic images, while the .gif format is best for flat colour images like logos.

If you need to add a new image to a page on the website, ensure that you have saved it at the proper size and in the correct file format before you proceed through the steps below. It is usually best not to upload images wider than the content area of your site's pages **[x px wide]**.

**To Add An Image to a Page:**

Adding an image to a page is quite straightforward and is done through the content editing box. Like with making a link, you start by following Steps 1 – 5 in Editing Site Pages above. Once you have the page open, follow these steps to add an image:

* Click on the Image icon in the editing toolbar (it looks like a little green tree and is third from the right in the image below).  
    
  
* A pop-up box will appear that looks like this:  
    
  
* If you know the location of your image on the website’s server, you can enter that location in theImage URL field, but it is more likely that you will want to click on the Blue and Red box icon to the right of that field to find the image/upload a new image. Once you’ve clicked on that you will see:  
    
  
* You may now either click on the image you would like to add, if it has already been added to the site, or use the Browse field at the bottom of the window to add a new image. The image should be uploaded at the size you would like it to appear on the website. If you wish to upload the file into a specific folder, eg. “images”, click on the dropdown below the list of files that says “Directory: /files” and select “/images”. Click on the upload button and you will now see the uploaded file in the bottom section of the popup window. Click on the file or the ‘add’ link next to the file name in the top section, and you will be returned to the Add an Image box with the Image URL field completed.
* You can now fill out the remaining fields:  
    
  
* Image Description: filling this field out ensures that users who browse the web with alternative technologies like screen readers will know what the image is of (the screen reader will read this text).
* Alignment: allows you to position the image in relation to the paragraph of text.
* Dimensions: these will be auto completed based on the size of the image you uploaded.
* Border: if you would like to set a border on the image you may do so here, but there is normally default border styles set in the site’s stylesheet.
* Vertical and Horizontal space: insert empty/white space between the image and the text. There is, by default some vertical and horizontal space set by the site’s stylesheet, but if you would like to add more, use these fields. Measurements are all in pixels.
* Submit the page to save.

Advanced Editing Options: Adding a Document to a Page/Story

In most cases, the documents being uploaded to the site should be PDF documents, as they are more universally readable by site users, and can not be edited or altered by site users. In some cases you may have a need to upload a text document or spreadsheet file, all of these files can be uploaded following the same steps as outlined below.

To upload a document to a site Page (the same instructions work for other content types), simply follow the same steps we reviewed for editing a site Page, which are outlined briefly again here:

* Ensure you are logged in to the site. If not, login at: <http://www.yoursite.com/user/>
* Either find the page that you would like to add the document to, or click on Create Content and select Page or the other type of content you would like to create.
* Place your cursor in the content editing window.
* With your cursor, highlight the text you would like to make into a link – in this case this will typically be the name of a publication or document.
* You will now see the “Link” button on the editing window change from being greyed out to turning light blue, making it available to click on:  
    
    
    
  Click on the link button and a pop-up window will open up.  
    
  
* The pop-up window will look similar to this image above. To link to a document that you have already uploaded to the site, click on the little blue/red box to the right of the Link URL field. You will now see a list of all the images and PDF files that have been uploaded to the site. If you want to look in the pdf’s or documents upload folder, click on the dropdown below the list of files that says “Directory: files/” and select “/pdfs” or “/documents”. If you would like to sort the files displayed by file type, click on the dropdown above the list of files that says “Display:” and select the file type (images, .pdf, .jpg, etc.) that you would like see.  
    
  
* Use the Browse field at the bottom of the window to find the document you wish to upload to the site. Once you have found it, click on the Upload file button and the document will be uploaded to the site (appearing now in the list at the top of this window) and the file will appear in the bottom section of the popup window. Click on the file or the ‘add’ link next to the file in the list if it has already been uploaded. The document’s link location will automatically be inserted into the Link box.
* You can now choose whether or not the file should open in a new window (the convention with PDF documents is that they open in a new window). And add a title if you wish. You can then click the Insert button and your file link will have been added.

Advanced Editing Options: Deleting a Document

If, once you’ve uploaded a document, you realize it is the wrong one, or that you no longer need to attach it to the Page (or Story as covered in a later section), you can easily remove the Document from the page.

Once your document has been uploaded, click on the Link dialogue box as before, and locate the document, then click on “delete” to the right of the document’s name. It will now be removed from the site. Please remember, however, that if you had a link to this document somewhere, you will need to go remove that link or the link will not work for site visitors.

Editing Stories

This section covers making changes to existing story content. It is worth noting that making changes to existing content here is much like making changes to regular site Pages, which we covered above, with a few key differences which will be noted.

Making Changes to Existing Stories

*It is worth noting that for the most part, you will rarely need to make changes to this content as it is by its nature generally not regularly updated.*

* Ensure you are logged in to the site. If not, login at: <http://www.yoursite.com/user/>
* Just as when editing Pages, you will now see a slightly different version of the site that introduces editing tabs.
* Navigate to the Story content you would like to change. Click on the “Edit” tab at the top of the site content. Your view of the page will now look like this:  
    
  **[IMG]**
* Just as with editing Page content, use the content editing window to make your changes.
* **Formatting considerations for Story content:** the content you enter in the title field will automatically be made an **H2 level heading**. If the content requires additional headings within the body text, you should start with **H3** styles and then cascade down to **H4** and **H5** for sub and sub-sub headings.
* Please be careful to ensure that the remainder of your body text is set with **“Paragraph”** formatting.  
    
  *NB: All of these styles can be chosen from the Format dropdown box as outlined on* ***[Page 8]****.*
* Scroll down the page and click “Preview” to preview your change.
* If you are satisfied with your change, hit the “Submit” button.

About Categories:

This website has introduced the ability to categorize content by a number of descriptors. Specifically the following categories have been created for the site:

**[List categories]**

One or more of these categories can be applied to any one Story. By applying the correct Category, you are indicating where in the site the new Story should be filed. **[give example]**

Creating a New page

To add a Page to your website:

* Begin by logging in at <http://www.yoursite.com/user>
* Hover over the “Create Content” link at the top left corner of the page and click “Page”. You will now see a page where you can enter all of the information for your new page.

**[IMG]**

* Fill in the Title and Body content.
* If you would like this page to have a specific URL (other than, e.g., node/54), enter the URL path you wish the page to display on under “URL path settings”. (Enter only what would come after the main site address, e.g. “foo/bar")
* If you would like this page to appear in the menu (if not, you can simply link to it from text on another page), enter the menu info in the “Menu settings” section. You must enter a title, set the “Parent item” (which can be either a top level menu, or a section of the site), and set the weight (how high up in the menu the item should be relative to the other items).
* Click “Submit”
* If you have added a menu item for this page, click the “Edit” tab at the top of the page.
* Under “Menu settings”, click the link “edit the advanced settings”, and then click “Submit”. The new menu item may not appear until you do these last two steps.

Adding Stories:

The Story content type is used to add items that are not pages. Story content can be added to the site individually and the website will **build the listings that appear on the various site pages for you.**

**To add a new Story item:**

* Ensure you are logged in to the site. If not, login at: [http;//www.yoursite.com/user/](http://www.bcfed.com/user/)
* Once you are logged in, you’ll notice that you now have a grey menu running along the top of the page. On the left-hand side of that menu is a drop down for “Create Content”, which is what you will always use to add new content to the site. Click on this to get a drop down option and select “Story”
* You will now be taken to a page to add your Story content, that looks like this:  
    
  **[IMG]**
* Begin by giving the new item a Title.
* You can now select the categories as they apply.
* You can now enter the Body of the story into the Body field, using all the same formatting options covered earlier in this manual.
* If you need to attach a file to the entry, do so following the same method covered in Editing Site Pages: Advanced Editing Options: Adding a Document to a Page.
* By default the system will insert the date that you create this new entry as its date. If you would like to backdate a resource, ie. an old piece of news or a past news release, you can do so by clicking on the phrase “Authoring Information” below the content editing window. You will see your user name in the “Authored by:” field, which you can leave (this will not show up on the public website). Then add the date for the release to the “Authored on:” box, following the format indicated: YYYY-MM-DD. The system will convert the date format to display properly on the public version of the site.
* If you wish to preview your item, click “Preview”. When you are satisfied with your work, choose “Submit”.

Adding Events:

Events are content that gets sorted by date, but can also be archived automatically once a date is passed. Much like with stories, the system will create the Event listing page for you, you simply need to add each event.

To add a new event:

* Ensure you are logged in to the site. If not, login at: <http://www.yoursite.com/user/>
* Once you are logged in, you’ll notice that you now have a grey menu running along the top of the page. On the left-hand side of that menu is a drop down for “Create Content”, which is what you will always use to add new content to the site. Click on this to get a drop down option and select “Event”
* You can now start adding your Event details, your window will look like this:  
    
  **[IMG]**
* Enter the Event Title.
* You may give the event categories if applicable.
* Fill out all of the remaining fields as they are available.
* If you need to add a file attachment to the event – perhaps a poster or registration PDF – do so following the same method covered in Editing Site Pages: Advanced Editing Options: Adding a Document to a Page/Story.
* Now choose “Preview” to see your work.
* When you are satisfied with your work, choose “Submit”.

Adding Categories:

Categories are used to sort content into areas of the site. By tagging a content item with a term belonging to a specific category it will then show up both on its own page and additionally if set up this way, in listings elsewhere on the site. To review, again we have several vocabularies (or types of category):

**[list vocabularies]**

To add new terms to any of these lists, follow these steps:

* Ensure you are logged in to the site. If not, login at: <http://www.yoursite.com/user/>
* You will now see the grey drop down menu in the top of the screen, for this item you will need to go into the “Administer” menu on the far right side. In Administer you’re going to: Administer  Categories

*WARNING: Once you go into this Administer section the page design may change to the default Administration theme, which looks something like the image below, don’t worry, you didn’t break anything!*  
  
**[IMG]**

* You can now add new terms to the vocabulary. Click on “Add Terms” to the right of each top level category (or vocabulary). Your screen will now look like this:  
    
  **[IMG]**
* Enter the new term
* You can now give the term a description, however this is not used on the front end of the site – this is optional.
* You can ignore the Synonym box for this website.
* Weight: the weight is used to order the terms. “heavier” terms (those with a 10 for example) will sink to the bottom, lighter ones (like “0” or “-10”) will float. Terms with the same weight will order alphabetically.
* Click Submit to add your new term.

Sending an Email newsletter

The email newsletter module has been set up to send HTML newsletters via the website. They have a predefined template already and can be created much like adding Pages or Stories to the system.  
  
The system allows you to build an email newsletter, test it by sending it to yourself and then once you are satisfied, send it to the mailing list. Upon the final send, the email newsletter can also be added automatically to the site’s newsletter archive.

**To create an Email Newsletter:**

* Ensure you are logged in to the site. If not, login at: <http://www.yoursite.com/user/>
* Once you are logged in, to create an Email Newsletter, navigate to Create Content  Newsletter Issue. Your screen will now look like this:

**[IMG]**

* You can now enter a Title for the newsletter. The Title will show up on the newsletter archive page, on the top of the Newsletter itself and as the Subject Line for the Newsletter.
* Under the Newsletter drop down, select the Newsletter category you would like to apply this to – this will also determine the mailing list to which the newsletter sends.
* The **Message** field is then used to enter the main newsletter content. You may add text and photos to these.
* Under “Newsletter sending options” leave the settings as they are when working on draft versions of the newsletter.
* Once you are done working on the newsletter, click “Preview” to preview your work or “Submit” to save it. By default, the newsletter will not be published or sent when you do this.

**Testing a newsletter:**

* When you are satisfied with your work**, it is important that you do a test sending of your email newsletter to yourself** and anyone else who may want to view it before it sends. To do this, make sure you have clicked on the “Edit” tab.
* Under “Newsletter sending options”, under “Sending” switch the setting from “Don’t send now” to “Send one test newsletter to the test address”. In the “Test e-mail addresses” field, add the addresses to which the test will be sent, separated with commas.
* When you are ready to send the test, click “Submit”.
* You should get the test email in you inbox in 10-15 minutes depending on system traffic. Return to the site to make any necessary changes.
* Be sure to check that the links work and that the layout and text are okay. Make any edits to the newsletter by clicking on the “Edit” tab, and then when you are finished, clicking “Submit” to save, with or without sending another test email.

**Sending/Publishing a newsletter:**

* When you are ready to send the newsletter, click on the “Edit” tab.
* Under “Newsletter sending options”, under “Sending” **switch the setting to “Send newsletter”. Under “Publishing options” click “Published*”****. It is important that you do both at the same time, and do not return to the page and re-submit it after the newsletter has sent, otherwise the system will reset the Newsletter to being Unsent and it may not appear on the public side of the site.*
* When you are ready to send the newsletter, click “Submit”.

Managing Newsletters

The Newsletter module also allows you to manage the email newsletter—there are five parts to the Newletter administration—to begin in the menu at the top of the page, navigate to Administer  Content management  Newsletters. You now have a page with five tabs across the top that looks like this:

**[IMG]**

There are five Newsletter admin tabs:

Sent issues

This page provides a list of all newsletters that have been sent—you can filter this list using the “Show issues from” dropdown.

Drafts

When you click on the Drafts tab, you will get a page that looks like this:

**[IMG]**

This page provides a list of all newsletters whether sent, published, or drafts—you can filter this list using the “Show issues from” dropdown. You can also navigate to and/or edit drafts through this page by clicking on either the title of the newsletter, or the “edit” link next to a newsletter. The column labelled “sent” will display an icon with a green checkmark once the newsletter send has completed—this can take several minutes depending on how large your subscription list is.

Newsletters

When you click the Newsletters tab, you will get a page that looks like this:

**[IMG]**

This page provides a list of all of the categories of newsletters/lists that you have created. From here, you can add a new category of newsletter or edit your existing newsletters. If you click on “Add newsletter” or “edit newsletter”, you will see a page that looks like this:

**[IMG]**

Here, you can add/edit the Newsletter name, a description of the newsletter (optional), and then weight (which controls where it will be positioned when in lists of newsletters).

Subscriptions

When you click the Subscription tab, you will get a page that looks like this:

**[IMG]**

This page (the **List subscriptions** tab) provides a list of all of the subscribers to your various newsletters. From here, you can filter to show subscriptions to specific newsletters, and import or export mailing lists.

**Deactivating subscriptions**: If you need to deactivate any subscriptions (this will deactivate all subscriptions for the email address), go to the List Subscriptions page, and click the “Inactivate” link to the right of the email address. You can also delete the address from subscriptions altogether.

**Importing (adding) and exporting subscriptions**

When you click on the Import subscriptions tab, you get a page that looks like this:

**[IMG]**

To import/add new email addresses:

* Copy and paste them into the text box labelled “E-mail addresses” – they must be in the form of plain text, with each email address separated with a comma.
* Under “Subscribe imported addresses to the following newsletters”, check the boxes for the newsletter(s) to which you would like to add the addresses.
* Click “Import”.
* If for any reason, some email addresses have not been added, the confirmation message will contain an error listing the addresses that have not been added. *Normally, this will only occur if there is a formatting error in an address.*

When you click on the Export subscriptions tab, you get a page that looks like this:

**[IMG]**

To export email addresses:

* Check the lists you would like to filter for (Active/Inactive users; Newsletters subscribed to), and click “Export”. The e-mail addresses will then appear in the box at the bottom in a comma-separated list, which you can copy and paste into a file on your computer.

Settings

This area contains the technical settings for your newsletters. Please do not make any changes in this section.

Managing Blocks (Sidebar Content)

Sidebar content, and other “blocks” can be managed much like regular pages. To manage the content in the sidebars:

* Ensure you are logged in and navigate to AdministerSite BuildingBlocks, there will be a list of blocks for the site:

**[IMG]**

* Find the one with the title matching the block you wish to edit and click 'configure'.
* You can then edit the content like you would a regular page:

**[IMG]**

* Click 'save block' when you're done.

*Please note that editing information in this area other than the block content (which is edited through a regular content editing window) may cause sidebar content to stop displaying properly.*

Logging Out

Once you have finished all of your site updates and work, log out of the system. You will find the “Log out” link in the menubar. Click on the “Logout” link and the system will log you out. If you have any trouble logging out, you can also type <http://www.yoursite.com/logout> into the address bar.

Appendix: Licensing

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