

Advanced Editor's Guide: Exercises

Drupal 7, GeorgiaGov Platform

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How to Use this Guide

Use these exercises during the Advanced Editor's Training session for hands-on experience with Drupal. Your instructor will provide you with the URL, username, and password for a training site you will use for these activities.

Naming: To distinguish your files from other students' files, add your initials at end of the Titles of content you create. For example, John Doe (initials "JD") would title the Webform in Exercise 1: "Satisfaction Survey – JD."

Accessing Exercise Files

Find the exercise file for this training session on the [Advanced Editor's Training page](http://digitalservices.georgia.gov/advanced-training) on our website (digitalservices.georgia.gov/advanced-training)

Download the JPG file, and save it to your Desktop to use in the exercise below.

Exercise 1: Creating a Webform

For this exercise, you will use the **Webform** content type to create a Customer Satisfaction Survey. You want to collect the following details from people who fill out your form:

- Customer's name (Textfield)
- Customer's email address (Email)
- Date of call (Date)
- Name of Representative (Select Options)
- Satisfaction Ratings (Grid)
- Comments (Textarea)


To create a Webform:

- 1) Select **Add content** from the shortcuts menu bar.
- 2) From the list of content, select **Webform** from the list of content types.
- 3) In the **Title** field, title this page "Satisfaction Survey – [Your Initials*]"
**see note in [How to Use this Guide](#) on exercise page titles*
- 4) In the **Body** field, type: "You recently made a call to our offices. Please tell us how it went."
- 5) Click **Save**.


Add Components

You will now add **Components**, or fields, to your form.


Customer's name (Textfield)

- 6) Click in the "New component name" field, and type "**Your Name**"
- 7) Select "**Textfield**" from the dropdown menu.
- 8) Click 
- 9) In the page that loads, you can add additional details to your form field. We don't need to add anything to this Textfield, so scroll down and click **Save Component**.

Customer's email address (Email)


- 10) Click in the "New component name" field, and type "**Your Email**"
- 11) Select "**Email**" from the dropdown menu.
- 12) Check the box in the **Mandatory** column to require that this field be filled out.
- 13) Click 
- 14) In the page that loads, you can add additional details to your form field. We don't need to add anything to this Textfield, so scroll down and click **Save Component**.

Date of call (Date)

- 15) Click in the "New component name" field, and type "**Date of Call**"
- 16) Select "**Date**" from the dropdown menu.
- 17) Check the box in the **Mandatory** column to require that this field be filled out.
- 18) Click 
- 19) In the page that loads, you can add additional details to your form field.
 - a. A user should only be select a date within the previous two weeks, and nothing in the future.
 - b. Under **Validation**:
 - i. Type "-2 weeks" for **Start Date**
 - ii. Type "today" for **End Date**
- 20) Scroll down and click **Save Component**.

Name of Representative (Select Options)

To collect the name of the customer service representative the customer spoke with:

- 21) Click in the "New component name" field, and type "**Name of Representative**"
- 22) Select "**Select Options**" from the dropdown menu.
- 23) Check the box in the **Mandatory** column to require that this field be filled out.
- 24) Click 
- 25) In the page that loads, you can add additional details to your form field.
 - a. Under **Options**, type the following list of representatives:
 - a|John Smith
 - b|Allison Johnson
 - c|Rachel Ramsey
- 26) Under **Display**, check "**Listbox**" to display the options in a drop-down list.
- 27) Scroll down and click **Save Component**.

Satisfaction Rating (Grid)

Now we want the user to rate their call, which we can do using a Grid component.

28) Click in the “New component name” field, and type “**Rate Your Call?**”

29) Select “**Grid**” from the dropdown menu.

30) Click 

31) In the page that loads, you can add additional details to your form field.

a. Under **Options**, type the following options:

5 | 5 (Strongly Agree)
 4 | 4
 3 | 3 (Neither Agree nor Disagree)
 2 | 2
 1 | 1 (Strongly Disagree)

b. Under **Options**, type the following options:

a | My call was answered in a timely manner
 b | The representative was friendly and courteous
 c | The representative was knowledgeable about my issue
 d | My issue was resolved

32) Scroll down and click **Save Component**.

Comments (Textarea)

Finally, we want the user to be able to add any other comments in a Textarea box, which is larger than a Textfield.

33) Click in the “New component name” field, and type “**Comments**”

34) Select “**Textarea**” from the dropdown menu.

35) Click 

36) In the page that loads, you can add additional details to your form field. We don't need to add anything to this Textfield, so scroll down and click **Save Component**.

To preview your form, click the **View** button in the upper right.



Figure 1 View Webform button

Exercise 2: Configuring Form Settings

For this exercise, you will configure the Webform Settings to send the results via email, test your form, and view the results in Drupal.

To configure what happens after a user submits your form, you will need to adjust the Webform Settings.

- 1) If you're Previewing your form, you will need to get back to the Webform backend. To do so, click the **Webform** button just above your page title.

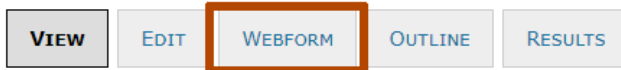


Figure 2 Webform button

- 2) When you're on the Webform screen, you will see an additional menu associated with the Webform section, that says + Form Components. Hover over + **Form Components** and click **Form Settings**.

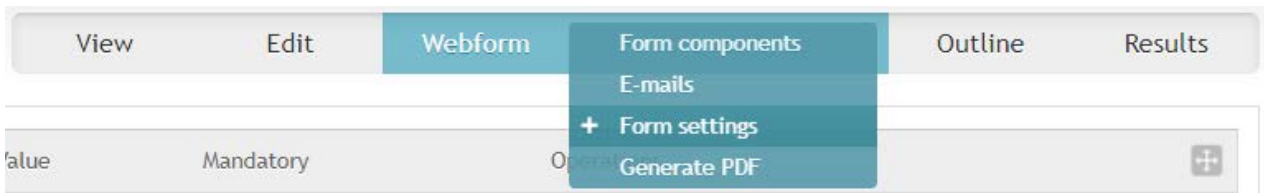


Figure 3 Form settings button

- 3) When a user submits the form, we want them to be sent to a Confirmation page that lets them know that their form has been submitted.
 - a. In the **Confirmation Message** field, type:

“Your survey results have been sent. Thank you for your feedback!”
 - b. Scroll to the bottom and click **Save Configuration**
- 4) Hover over the + **Form Settings** button and click **E-mails**. You want to receive an email with the form results each time a user submits the form.
 - a. In the **Address** field, replace email@example.com with your email address, and click **Add**.
 - b. On the page that appears, you can configure how the email looks when you receive it.
 - i. Under **E-mail From Address**, change the radio button to **Component: Email**
 - ii. Under **E-mail From Name**, change the radio button to **Component: Your Name**
 - c. Click **Save E-mail Settings**

Exercise 3: Testing and Viewing Form Results

Testing Your Form

To test your form:

- 1) Click the **View** button, and fill out the form to confirm that everything works as expected.
- 2) If you have time, fill it out a second time with different responses.

Viewing Form Results

You should be receiving an email with the results of every form submission. You can also see the form results in Drupal.

To see your Webform Results:

- 1) Click the **Results** button above the page title. You can click through individual form responses, or
- 2) Hover over the **+ Submissions** button and view the results in a different format.
 - a. Choose **Table** to see a listing of all results.
 - b. Choose **Analysis** to see a count of the varied responses.
 - c. **Download** your results as an Excel file.

Exercise 4: Creating a Menu Item

Now that you have finished setting up your form, you want to make it available to your users. The form is automatically **Published** when you first create it, but will only be available to people who know the URL. Once you're ready for people to use your form, you can link to it from anywhere.

- 1) To add the form to your main menu, click the **Edit** button above the page title.
- 2) Scroll down to **Menu Settings** and check **Provide a menu link**.
- 3) Change the **Parent Item** to "About Us." This will move it to under the About Us menu.
- 4) Click **Save**.

Exercise 5: Managing Menus

You can manage the position and titles of your Main Menu items from the Main Menu section.

- 1) Click **Main Menu** from the Shortcuts bar.

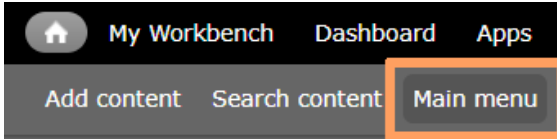


Figure 4 "Main menu" shortcut link

- 2) To the right of the **Satisfaction Survey** line, click **Edit**
- 3) Change the **Menu Link Title** to "Satisfaction Survey" (remove your initials). This changes the Menu title, but does not change the title of the Webform itself.
- 4) Change the **Parent Link** to "Services." This will move it to under the Services menu.
- 5) Click **Save**.
- 6) You will now find the Satisfaction Survey menu at the bottom of the list of links under Services. To move it above "Sub-Level1" in that list,
 - a. Click and hold down on the Anchor handle **+** to the left of **Satisfaction Survey**.
 - b. While holding your mouse button down, drag the menu item to above **Sub-Level1**.
 - c. Click **Save Configuration** at the bottom of the page to save your change.

Note: The Main Menu is only designed to accommodate up to 7 menu items. You will need to keep your Main Menu set to 7 items or less, and structure the rest of your pages to be organized within those 7 items.

Exercise 6: Updating the Homepage Rotator

Exercise Files:

- survey-rotator.jpg

You can edit the content of a Rotator (or any other manually curated content box) on your homepage at any time.


- 1) Go the homepage, and find the rotator.
- 2) Hover your mouse over the content area.
 - a. Select the small gear icon  that appears in the upper-right corner of the content area, and then click on **Edit Box** in the dropdown that appears.



Figure 5 Gear icon for Rotator box

- 3) An “Edit Box” dialogue will appear, showing you the options for the rotator. Each slide in the rotator has a set of information that needs to be added to it. You will be deleting one slide, and adding a new one.
- 4) To delete a rotator item, scroll to the bottom of that item’s details, and click the **Remove** button just before the next item’s details begin (this will be the second “Remove” button for that item).

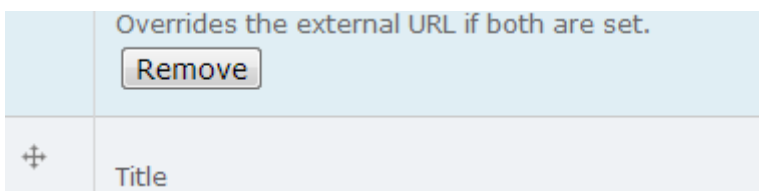



Figure 6 Rotator item Remove button

- 5) Once the item has been removed, scroll down until you see a blank Rotator listing.
 - a. In the **Title** field, type:
"Take Our Satisfaction Survey"
 - b. In the **Description** field, type:
"Have you spoken with one of our Customer Service representatives? Take our Satisfaction Survey now!"
 - c. Under the **Image** label, click **Choose File**. Navigate to your Exercise Files (most likely on your Desktop), select the "survey-rotator.jpg" image, and click **Open**.
 - d. In the **Alternate Text** field, type "Sharpie marker checking a survey checkbox."
 - e. In the **Node Reference** field, begin to type "Survey" and select your "Satisfaction Survey" title from the list.
 - f. To **move** this item to the first position, click the Anchor handle  to the left of the Title, and drag it above the other rotator items.
 - g. Click **Save**.

You have now deleted one Rotator item, and added a new one.