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Introduction

This is the Chapter Administration Training Document for the new Turnaround Management Association website. It describes each piece of functionality available for Chapter Administrators, including the following:

- 1. Logging into the website administration section.
- 2. Adding, editing, and deleting Sponsors.
- 3. Adding, editing, and deleting Sponsor Levels.
- 4. Managing Sponsor display on the homepage.
- 5. Adding, editing, and deleting Documents.
- 6. Viewing a list of all content.
- 7. Adding Basic Page content.
- 8. Managing Chapter menu links.
- 9. Selecting a Member as a Featured Member or Leadership Member.
- 10. Switching between Chapter Homepage layouts.
- 11. Editing Chapter information.
- 12. Editing Committee information





Terminology

Before working in Drupal, the administrator must understand these Drupal-specific terms.

- 1. A **Node** is an individual piece of content (e.g. a Sponsor, a Page, or an Event).
- 2. A **User** is a person with a Drupal account. There are two types of users:
 - a. ACGI User: Each ACGI account has a synchronized account within Drupal. This allows these users to be displayed in the Membership and Certification Directories, in user profiles, and assigned as Featured or Leadership Members.
 - b. Drupal Admin User: A user created specifically for Drupal administration. This user is not related to an ACGI account in any way.
- 3. A **Content Type** is utilized to store different kinds of data. Drupal websites contain many Nodes, each of which has a particular Content Type.
- 4. A **View** is a dynamic representation of content in page or block form. Views are used to obtain data from the database and display it based on a set of criteria.
- 5. A Taxonomy Vocabulary is a set of Taxonomy Terms (e.g. Sponsor Level).
- 6. A **Taxonomy Term** is a category. It can be assigned to a Node (e.g. Assign a Sponsor Level to a Sponsor).
- 7. An **Organic Group** is a group of users. Each Chapter is represented on the website by an Organic Group.
- 8. The **Drupal Administration Section** is the administration backend portal.
- 9. The **Drupal Frontend Section** is the part of the website with which all users interact.

Website URL

Before the new website goes live, access the new TMA site at <u>http://tma.utdev.com</u>.

After the new website goes live, access the new TMA website at <u>http://www.turnaround.org</u>.

Logging in

Each Chapter administrator will be provided with credentials by TMA Global staff. Use these credentials to login to the website.

Before the new website goes live, login to the new TMA site at <u>http://tma.utdev.com/tma-admin</u>.

After the new website goes live, access the new TMA website at <u>http://www.turnaround.org/tma-admin</u>.

Chapter Administration Dashboard

Upon login, the administrator will be brought to the Chapter Administration Dashboard. This Dashboard contains multiple dashlets, each of which contain links to all potential actions that a Chapter Administrator may take.

The bar across the top of the page contains the administration menu. It remains on top of the page at all times, even if the administrator moves from the administration section to the frontend section.





At any time, go back to the Chapter Administration Dashboard by clicking "Chapter Administration" in the top menu.

Dashlets

My Chapter

Administrators can view information about their Chapter.

Recently Updated Chapter Sponsors

Administrators can view recently updated Sponsors, add a Sponsor, or edit a Sponsor.

Sponsor Levels

Administrators can view all Sponsor Levels and add a Sponsor Level.

My Committees

Administrators can view all Committees in their Chapter.

Quick Links

Administrators can view all Chapter content, edit Chapter information, view/edit Member information, view/edit the Chapter menu, and view/edit Sponsor Levels.

Upcoming Events

Administrators can view/edit upcoming Events.

Recently Updated Documents

Administrators can view recently updated Documents, add a Document, or edit a Document.

Managing Content

View All Content

- 1. To view all content assigned to this Chapter, click on the "View All Chapter Content" in the "Quick Links" dashlet.
- 2. From this page, the administrator can search all of the Chapter's content.

Add Content

Quickly add content by hovering over "Add Content" in the top menu. The administrator can select the desired content type to add.

WYSIWYG Content

When editing body content on a Page, Document, News, or Chapter, administrators will be presented with a WYSIWYG editor containing content formatting options. This is a description of each option from left to right.

- 1. Bold: Highlight text and click this button to bold that text.
- 2. Italic: Highlight text and click this button to italicize that text.
- 3. Underline: Highlight text and click this button to underline that text.
- 4. Strikethrough: Highlight text and click this button to strikethrough that text.





- 5. Left Align: Highlight text and click this button to left align that text.
- 6. Center Align: Highlight text and click this button to center align that text.
- 7. Right Align: Highlight text and click this button to right align that text.
- 8. Justify: Highlight text and click this button to justify that text.
- 9. Bulleted List: Highlight text to turn it into a bulleted list.
- 10. Numbered List: Highlight text to turn it into a numbered list.
- 11. Outdent: Click on a bulleted or numbered list item. Click on this button to outdent this item up one level.
- 12. Indent: Click on a bulleted or numbered list item. Click on this button to indent this item up one level.
- 13. Undo: Click this button to undo the most recent change.
- 14. Redo: Click this button to redo the most recent change.
- 15. Link: Highlight text and click this button to turn the text into a link.
- 16. Unlink: Click on an existing link. Click this button to unlink that link.
- 17. Anchor: Highlight text and click this button to turn the text into an anchor link.
- 18. Superscript: Highlight text and click this button to superscript that text.
- 19. Subscript: Highlight text and click this button to subscript that text.
- 20. Source: Click this button to view raw HTML.
- 21. Cut: Highlight text and click this button to cut that text.
- 22. Copy: Highlight text and click this button to copy that text.
- 23. Paste: Click this button to paste text into the WYSIWYG.
- 24. Paste as Plain Text: Click this button to paste text into the WYSIWYG as plain text. This is very useful when copying in text that has styles attached.
- 25. Paste from Word: Click this button to paste in content from Microsoft Word. A dialog box will appear. Copy the Word document text into this dialog box and click "OK".
- 26. Add Media: Click this button to add images or video into the WYSIWYG.

Content Types

Sponsors

Add a Sponsor

- 1. To add a Sponsor, click on the "Add a Sponsor" link in the "Recently Updated Chapter Sponsors" dashlet.
- 2. An empty form will appear containing the following fields.
 - a. Title: Enter the title of Sponsor.
 - b. Sponsor Image: Upload the Sponsor Image.
 - i. Click on "Browse".
 - ii. To upload a file, click on "Choose File" and select the file from the computer. Click "Next" to continue.
 - iii. To use a file from the server, click on the "Library" tab. Search by name and type. Select the image and click "Submit".
 - c. Body: Leave this empty.





- d. Sponsor Website URL: When the user clicks on the Sponsor image, they will be brought to this link. Please include "http://" at the beginning of the URL.
- e. Show on Chapter Homepage: Select this checkbox to show this Sponsor on the Chapter Homepage.
- f. Sponsor Level: If this Sponsor will appear on the homepage, select the appropriate Sponsor Level.
- g. Groups Audience: This will default to the administrator's Chapter. No action is required on this field.
- h. Sponsor ACGI ID: When migrating Sponsors from the current TMA CMS to this new system, include the new ACGI ID.
- 3. Click "Save".

Edit a Sponsor

- 1. Go to the Chapter Administration page.
- 2. If the Sponsor is recently updated, it will appear in the "Recently Updated Chapter Sponsors" dashlet. Click the "Edit" link.
- 3. If it does not appear in the table, click on "List all Sponsors". This brings the administrator to the Content Administration screen. All Sponsors will appear on this page. Click the "Edit" link next to the desired Sponsor.

Attach Sponsors to Events

- 1. If the Sponsor is recently updated, locate the "ID" column. Paste this ID into ACGI.
- 2. If the desired Sponsor does not appear in the table, click on "List all Sponsors". This brings the administrator to the Content Administration screen. All Sponsors will appear on this page. Locate the ID column of the desired Sponsor.

Sort Homepage Sponsors

Homepage Sponsors are sorted by Sponsor Level and randomized by Sponsor Level.

Sponsor Levels

Sponsor Levels define the sort order of Sponsors on the homepage.

Add a Sponsor Level

- 1. To add a Sponsor Level, click on the "Add a Sponsor Level" link in the "Sponsor Levels" dashlet.
- 2. Enter the name of the Sponsor Level.
- 3. Click "Save".
- 4. The Sponsor Level has been added to the website.

Reorder Sponsor Levels

- 1. To reorder Sponsor Levels, click on the "Edit Sponsor Levels" link in the "Quick Links" dashlet.
- 2. Click on the four-way arrow next to a term and drag it up or down the table.
- 3. When finished, click "Save".
- 4. Sponsor Levels will now be ordered on the homepage in that order.





Set Event as Featured

All Event data will continue to be entered into ACGI. There is one new field, "Featured Event", which administrators can modify on the Drupal website.

Chapters

Homepage Layouts

Each Chapter can choose from one of four homepage layouts. Certain layouts display certain content, and it is important to make sure appropriate content exists before changing Chapters.

- 1. Full Layout. This is the default layout, and should be used if there is any question about lack of content.
- 2. Events Layout. This layout focuses on Events. Only use if there are at least four upcoming Events for the Chapter.
- 3. Partners Layout. This layout puts focus on Sponsors. Ensure that all Sponsors are entered before using this layout. The layout works best with 6 or more Sponsors.
- 4. Advertisements. This layout focuses on advertisements.

To change the layout:

- 1. From the "Quick Links" dashlet, click on "Edit Chapter Information".
- 2. Look for the field titled "Chapter Website Layout".
- 3. Select the desired layout.
- 4. Click "Save" at the bottom of the page.

Edit Chapter Information

- 1. To edit a Chapter, click on the "Edit Chapter Information" link in the "Quick Links" dashlet.
- 2. A form will appear containing the following fields:
 - a. Enable menu for this group: Leave this checked at all times.
 - b. ACGI Chapter String: This is the ACGI ID number for the chapter. Do not edit this field.
 - c. Chapter Name: The name of the Chapter. Do not edit this field.
 - d. Chapter Website Layout: See "Homepage Layouts" for more information on this field.
 - e. Body: Enter the "About" information about this Chapter.
 - f. Email: Enter the contact email for this Chapter.
 - g. Logo: Upload the Chapter's logo.
 - h. President: Select the President of this Chapter. Search by ACGI username.
 - i. Facebook URL: The Chapter Facebook page's URL.
 - j. Twitter URL: The Chapter Twitter page's URL.
 - k. LinkedIn URL: The Chapter LinkedIn page's URL.
 - I. Chapter Background: Upload the Chapter Homepage background. This background image must be 1500px by 360px.
 - m. Chapter Location: Enter the mailing address of the Chapter.





Edit Committee Information

- 1. Go to the Chapter Administration page.
- 2. Located the Committee in the "My Committees" dashlet. Click the "Edit" link.
- 3. Chapter Administrators may updated the "Body" field to provide information about the Committee. All other fields should not be changed. These should be modified in ACGI.

Documents

Chapter Administrators can add Documents to Committees. Committee members can view all documents in that Committee's repository.

Add a Document

- 1. To add a Document, click on the "Add a Document" link in the "Recently Updated Documents" dashlet.
- 2. An empty form will appear containing the following fields.
 - a. Title: Enter the title of the Document.
 - a. Document:
 - i. Click on "Browse".
 - ii. To upload a file, click on "Choose File" and select the file from the computer. Click "Next" to continue.
 - iii. To use a file from the server, click on the "Library" tab. Search by name and type. Select the image and click "Submit".
 - b. Groups Audience: Choose the Committee(s) to which this file belongs.
- 3. Click "Save".

Edit a Document

- 4. Go to the Chapter Administration page.
- 5. If the Document is recently updated, it will appear in the "Recently Updated Documents" dashlet. Click the "Edit" link.
- 6. If it does not appear in the table, click on "View all Documents". This brings the administrator to the Content Administration screen. All Documents will appear on this page. Click the "Edit" link next to the desired Document.

Basic Pages

Basic Pages are static pages that can be added to any Chapter.

Add a Basic Page

- 1. To add a Basic Page, mouse over "Add Content" in the top menu and click on "Basic Page".
- 2. An empty form will appear containing the following fields.
 - a. Title: Enter the title of the page.
 - b. Body: Fill in the body content of the page.
- 3. Click "Save".





Edit a Basic Page

- 1. Go to the Chapter Administration Page.
- 2. Click on "View All Chapter Content".
- 3. Filter by Title or Type.
- 4. Click "edit" next to the desired Basic Page.

Members

Define a Member as a "Leadership Member" or a "Featured Member"

- 1. From the "Quick Links" dashlet, click on "Manage Chapter Members". A paginated list of all Members will be displayed on this page.
- 2. Search for the desired Member by:
 - a. Username: The ACGI username of the user.
 - b. ACGI Person ID Number: The ACGI ID number of the user.
 - c. Display Name: The full name of the user.
 - d. Role Name: Drupal roles assigned to the user.
 - e. Click "Apply". Within a few seconds, a filtered list of users will appear.
- 3. Click on "edit" in the Operations column.
- 4. Choose "Leadership Member" and/or "Featured Member" under the "Roles" heading.
- 5. Click "Update Membership". The Roles have now been saved for that user.
- 6. Click on "Chapter Administration" in the top menu bar to proceed back to the dashboard.

Manage the Menu

To manage menu links, click on the "Manage Menu Links" link in the "Quick Links" dashlet.

Reorder links

- 1. Click on the four-way arrow next to a term and drag it up or down the table.
- 2. When finished, click "Save".
- 3. The menu will now be displayed in that order.

Add a Menu Item

Note: If the administrator adds too many menu links, the homepage menu will span two or more lines instead of one. The menu appears best when spanning only one line. The administrator must keep this in mind when adding links.

- 1. Click on Add Item. Fill out the following fields:
 - a. Menu Link Title: The text to be used for this link in the menu.
 - b. Path: The path for this menu link. This can be an internal Drupal path such as node/add or an external URL such as http://drupal.org. Enter <front> to link to the front page.
- 2. Click "Save".

Disable a Menu Item

- 1. Uncheck the "Enabled" checkbox next to any menu item.
- 2. Click "Save".