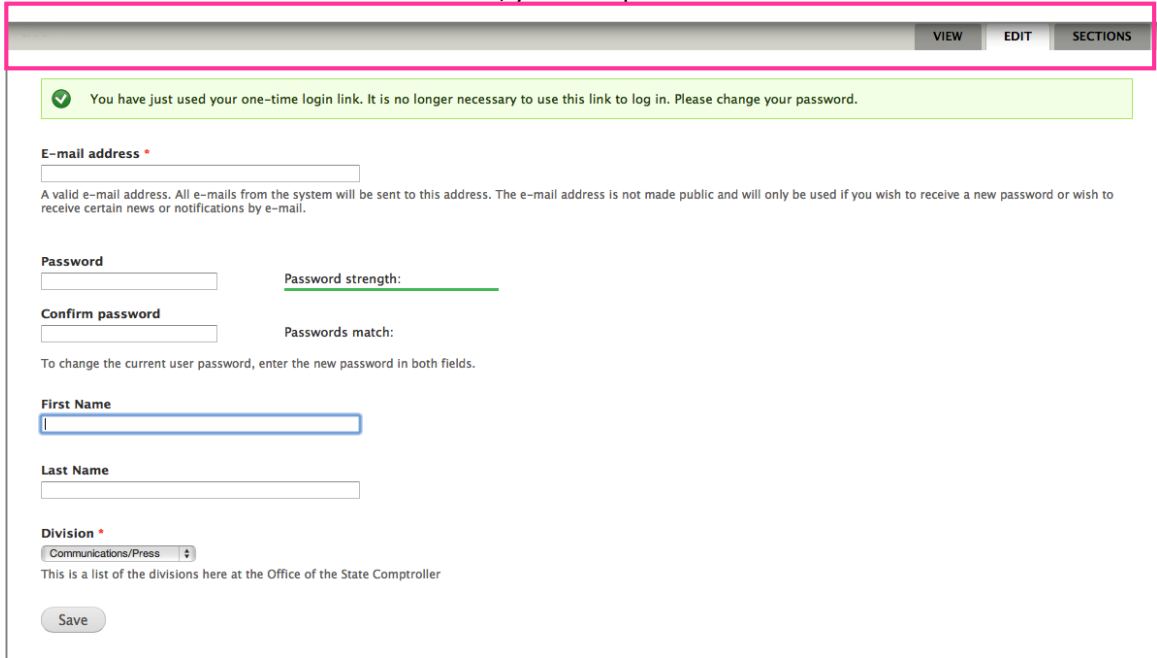


Drupal Use Case – Providers

Logging in:

1. You will receive an email indicating that a user account has been created for you. The email will include an activation URL.
2. Click the first URL. Once the URL is clicked, you'll be presented with the screen below.



The screenshot shows a web interface for setting up a user profile. At the top, there is a navigation bar with 'VIEW', 'EDIT', and 'SECTIONS' tabs. Below this, a green message box states: 'You have just used your one-time login link. It is no longer necessary to use this link to log in. Please change your password.' The form includes the following fields and sections:

- E-mail address ***: A text input field with a note below it: 'A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.'
- Password**: A text input field with a 'Password strength:' indicator showing a green bar.
- Confirm password**: A text input field with a 'Passwords match:' indicator.
- First Name**: A text input field.
- Last Name**: A text input field.
- Division ***: A dropdown menu currently showing 'Communications/Press'. Below it is a note: 'This is a list of the divisions here at the Office of the State Comptroller'.
- Save**: A button at the bottom left of the form.

3. You will need to:
 - Create and confirm a new **Password**.
 - Enter your **First** and **Last Name**.
 - Select your **Division**.
 - Click the **Save** button.

After your initial login, you will use the following URL to access the Drupal login screen.

<http://drupal.rtpinterdev.ent.nysret.osc.state.ny.us/?q=user/>

4. Enter your **Username** and **Password** and click the **Log in** button.
5. This will log you into Drupal and bring you to your **Profile Page**.

Creating a new basic page

1. Log in to Drupal.
2. Select the **Create Content** tab.

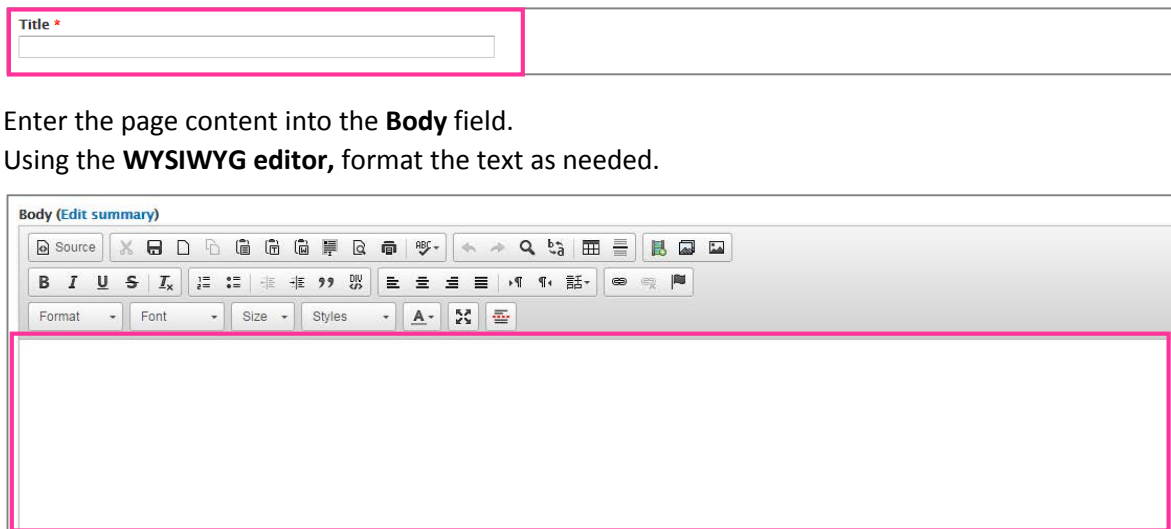


3. Select **Basic page**.



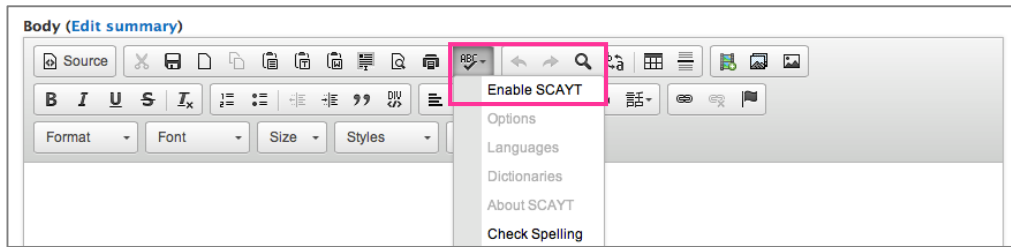
FORMATTING CONTENT

4. Enter the page title in the **Title** field.
5. Enter the page content into the **Body** field.
6. Using the **WYSIWYG editor**, format the text as needed.

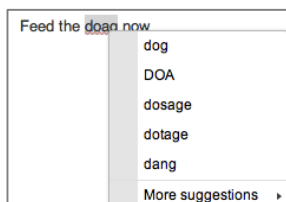


Drupal Use Case – Providers

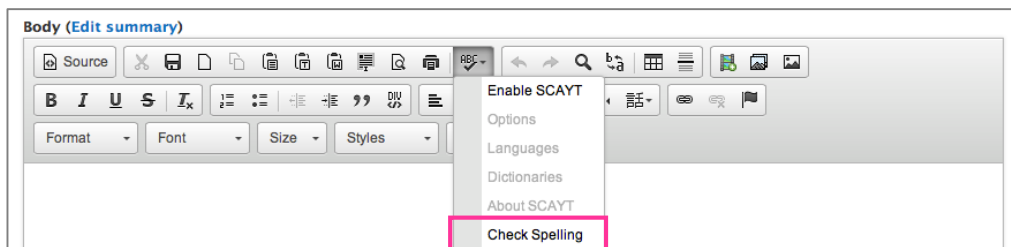
- To enable spell check, select **Enable SCAYT** (SpellCheckAsYouType) from the Spelling icon dropdown menu.



- When SCAYT is enabled misspelled words will be underlined. To correct any errors, right-click the word and make a selection from the the suggested options.



- You can also run a Spell Checker by selecting **Check Spelling** from the Spelling icon dropdown menu.



Adding text, links and images to an existing page

- Log in to Drupal ([see login instructions above](#)).
- Under **All Recent Content**, find the Content that you created in the **Actions** column.

All Recent Content							
ACTIONS	TITLE ▼	EDITORIAL GROUP(S) SECTION	FROM STATE	CURRENT	TYPE	AUTHOR	LAST UPDATED
edit	test	publisher	draft	No	Basic page	pwmcmahon	18 min 3 sec ago
edit	test	publisher	needs_review	Yes	Basic page	pwmcmahon	18 min 3 sec ago

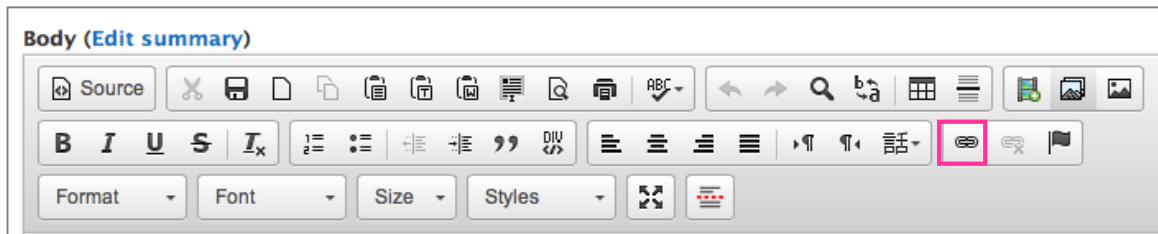
[view all](#)

- Use the **WYSIWYG editor** to add and format text.

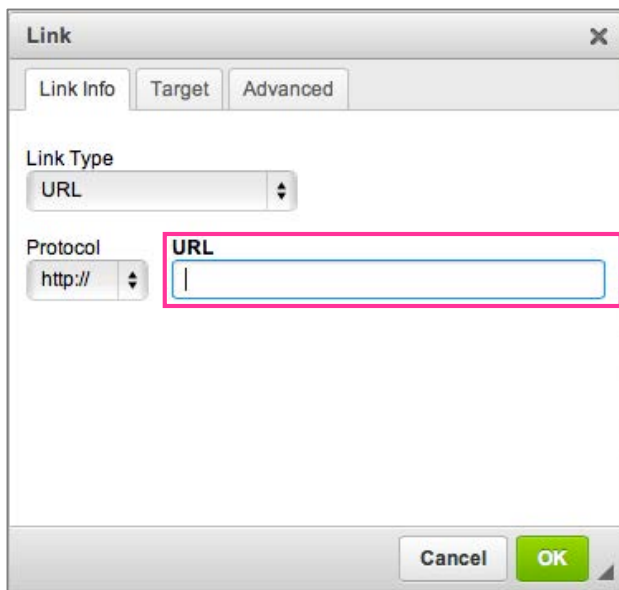
Drupal Use Case – Providers

ADDING A LINK

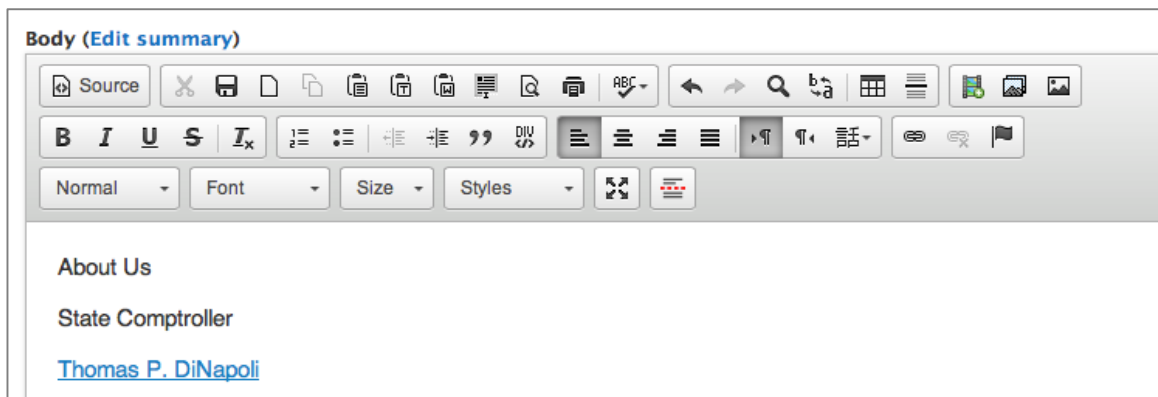
4. To add a link, highlight the text you wish to make a hyperlink and then click the **Link** icon,



5. Next, enter the URL into the URL field. Click OK to embed the link and return to the WYSIWYG editor.



6. The text you highlighted will now be an active link.



ATTACHING A FILE

7. To attach a file scroll down to the **File Uploader** and click **Choose File**.

Drupal Use Case – Providers

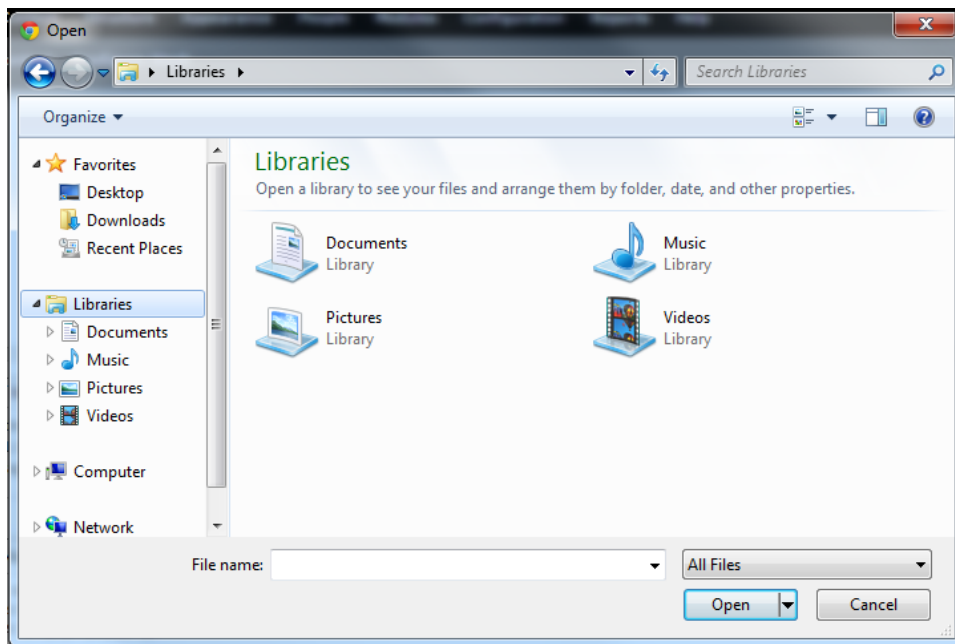
FILE UPLOADER

Add a new file

Choose File no file selected **Upload**

Files must be less than 8 MB.
Allowed file types: txt pdf jpg png doc docx xls xlst xlsx gif ppt.

8. After clicking the **Choose File** button you will be presented with a file selector. Browse to the file you want to upload and click **Open**.



9. The file you selected will now be in the **File Uploader**. To the right of the file name, click **Upload**.

FILE UPLOADER

Add a new file

Choose File tpd_bio.pdf **Upload**

Files must be less than 8 MB.
Allowed file types: txt pdf jpg png doc docx xls xlst xlsx gif ppt.

10. The uploaded file will be listed in the **File Information** box. You can enter a description in the **Description** field. The file can be deleted with the **Remove** button to the far right.

FILE INFORMATION	OPERATIONS
<p>✚ tpd_bio.pdf (243.87 KB)</p> <p>Description</p> <p><input type="text"/></p> <p>The description may be used as the label of the link to the file.</p>	<p>Remove</p>

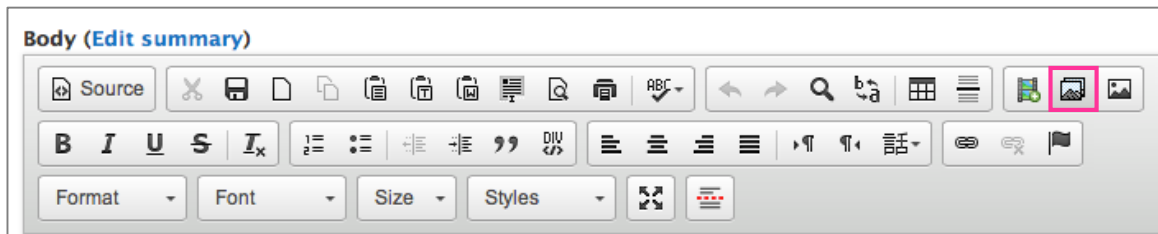
Drupal Use Case – Providers

11. The file will now appear as a clickable link.



INSERTING AN IMAGE

12. To add an image click the **Add Media** button in the WYSIWYG editor.



13. This will bring you to the **Library**. Select the image you want and click the **Submit** button.

14. The image will now appear in the Embedding dialog box. Click the **Submit** button.

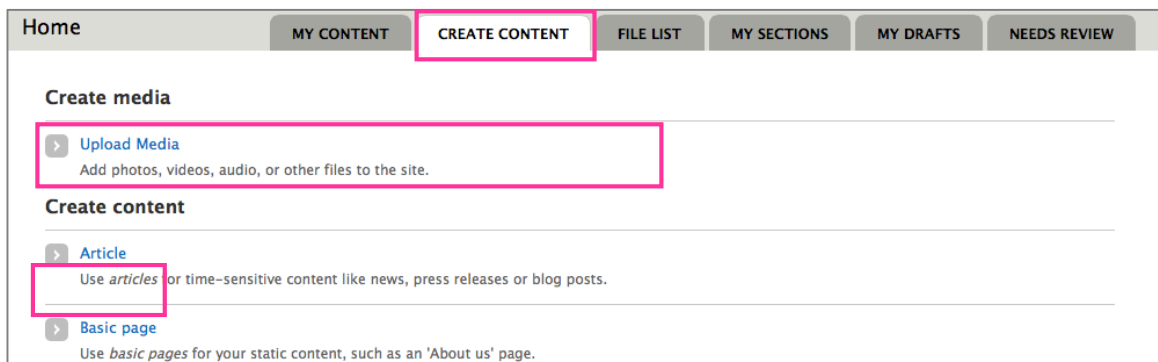
ADDING MEDIA TO THE LIBRARY

15. If you could not find your image in the Library, you will need to add it.

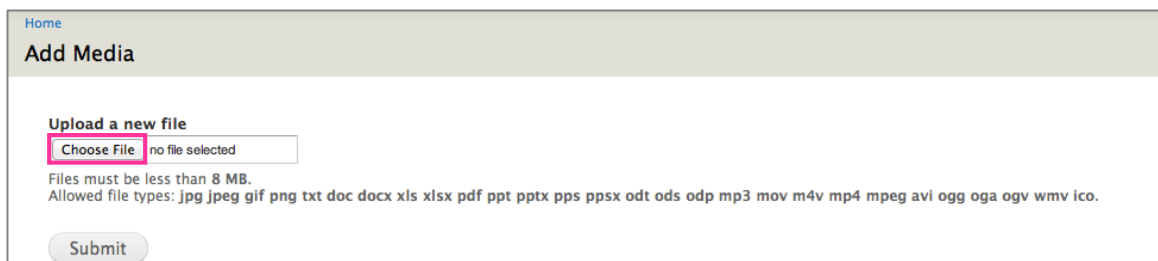
16. Select the **Save** button to save your work and return to **My Workbench**.

17. From My Workbench, select the **Create Content** tab.

18. Select **Upload Media**.

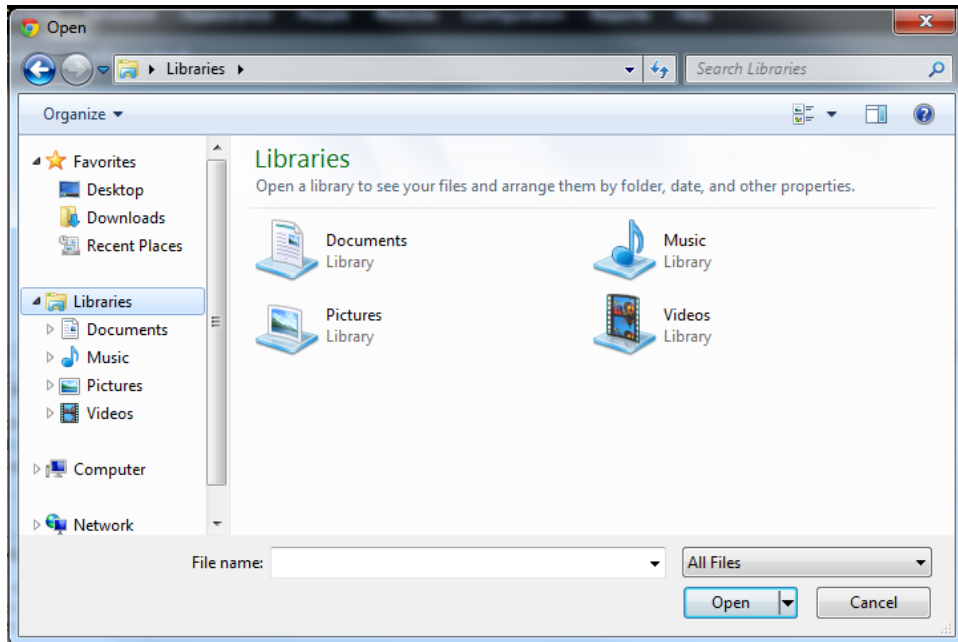


19. From the **Add Media** window, click **Choose File**.



20. After clicking the **Choose File** button you will be presented with a file selector. Browse to the file you want to upload and click **Open**.

Drupal Use Case – Providers



21. Your file will now be listed in the Add Media window.

Add Media

Upload a new file

NYS_Seal_color.png

Files must be less than 8 MB.
Allowed file types: jpg jpeg gif png txt doc docx xls xlsx pdf ppt pptx pps ppsx odt ods odp mp3 mov m4v mp4 mpeg avi ogg oga ogv wmv ico.

22. Click **Submit** to upload it to the Library.

23. To return to the page you are working on select **My Workbench** from the top menu.

24. Select the **My Content** tab.

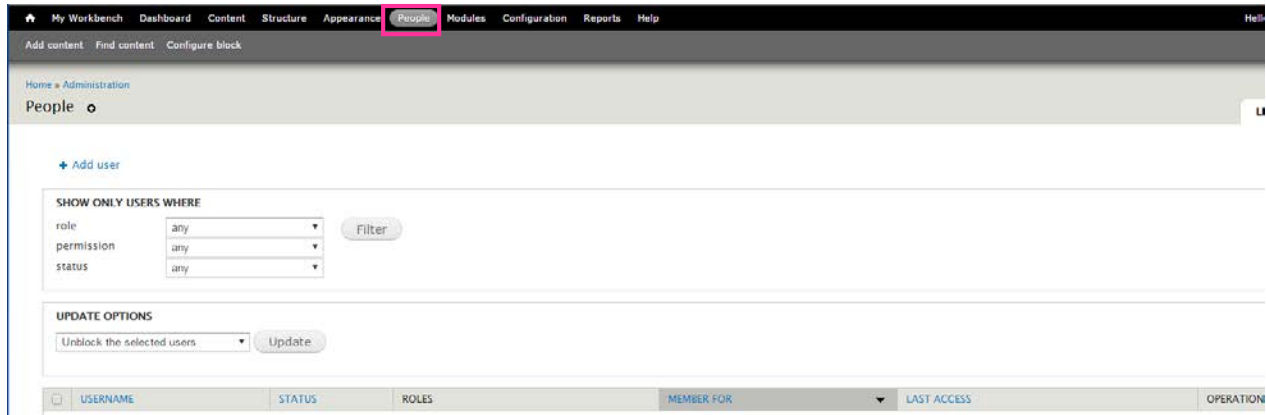
25. Under **All Recent Content**, find the Title and select **Edit** in the **Actions** column to return to the editor.

26. Now that your image is in the Library, follow Steps 14-16 above to add the image to your page.

Drupal Use Case – Providers

Creating and managing users:

1. Log into Drupal
2. Click on the **People** option



3. Click on the **Add user** link
4. Next, enter the information for the user

A screenshot of the Drupal 'Add user' form. The form is titled 'Add user' and contains several fields: 'Username' (with a red asterisk), 'E-mail address' (with a red asterisk), 'Password' (with a red asterisk and a password strength indicator), and 'Confirm password' (with a red asterisk). Below these fields, there is a section for 'Status' with radio buttons for 'Blocked' and 'Active', and a section for 'Roles' with checkboxes for 'authenticated user', 'Administrator', and 'Content Provider'. The form also includes a 'To make your password stronger' section with a list of suggestions: 'Add uppercase letters', 'Add numbers', and 'Add punctuation'. The form is titled 'Add user' and contains several fields: 'Username' (with a red asterisk), 'E-mail address' (with a red asterisk), 'Password' (with a red asterisk and a password strength indicator), and 'Confirm password' (with a red asterisk). Below these fields, there is a section for 'Status' with radio buttons for 'Blocked' and 'Active', and a section for 'Roles' with checkboxes for 'authenticated user', 'Administrator', and 'Content Provider'. The form also includes a 'To make your password stronger' section with a list of suggestions: 'Add uppercase letters', 'Add numbers', and 'Add punctuation'.

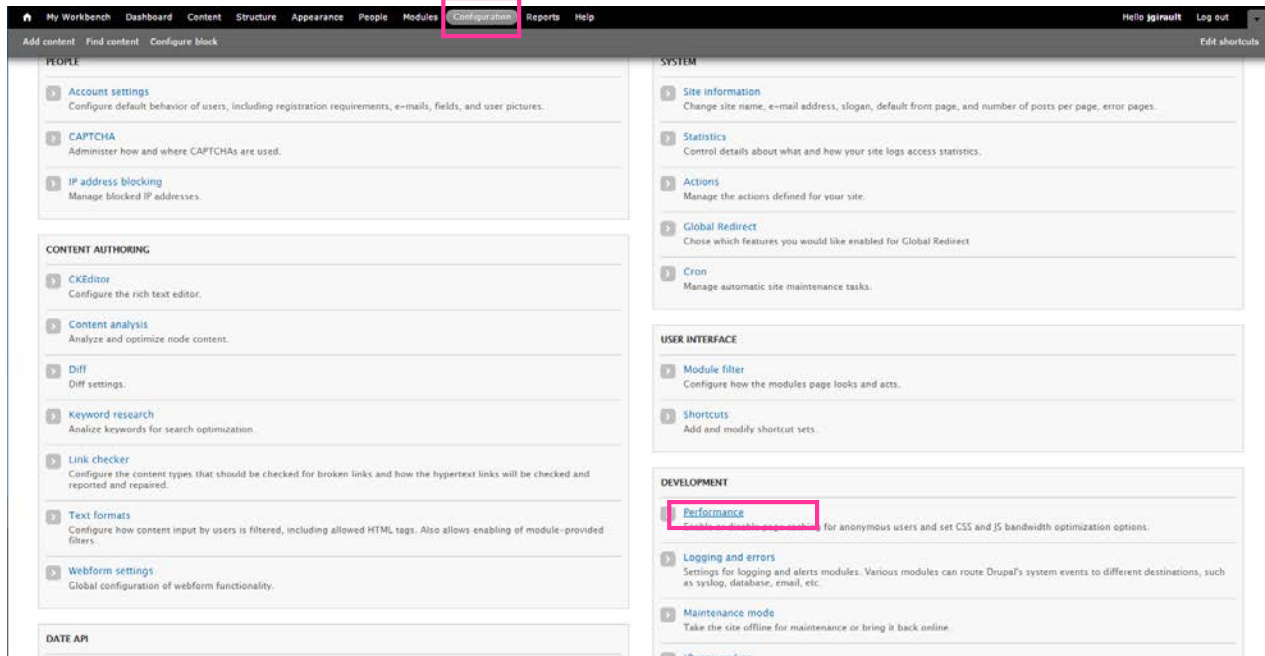
5. Assign the user a Role.
6. Save by clicking the **“Create new user account”** option. If you’ve provided an email account and selected the **“notify user”** option, the new user will receive a notification email.

Drupal Use Case – Providers

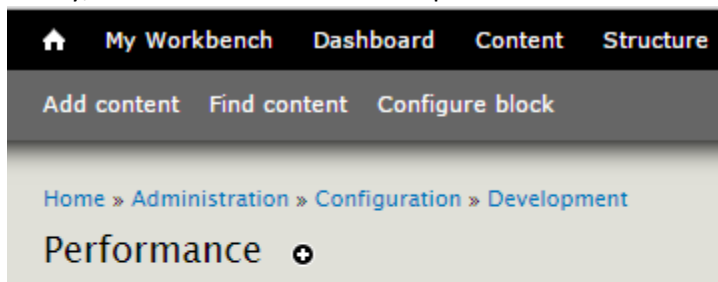
Debugging & Performance issues

A good rule of thumb when experience performance issues it to clear your cache. If you’ve made a change or added a module and don’t notice the changes; try clearing your cache and see if that addressed the issue. To clear cache, go to the “**Configuration**” section.

Click on



Finally, click on the ‘**Clear Cache**’ option



CLEAR CACHE

Clear all caches