

ESW Website Usage Guide

Hello!

With the creation of our new website, I'm going to attempt to write up some documentation - this is the first piece, highlighting registration, group permissions, and how to add or edit content. If you have questions, please let me know, and I will do my best to update this guide accordingly. Similarly, if there is a guide you would like to see, send me an email.

Cheers,
Alex Dale
Director of Communities and Technology, 2012

Website Overview (for those who are interested):

The site is built on two main systems: Drupal and CiviCRM. Drupal is the basis for all web content - static pages, blog posts, file storage, the basic login system, etc. CiviCRM deals with people - contacts, memberships, financial transactions, detailed information such as schools and majors, and event planning and registration. Within Drupal, a third module known as Organic Groups provides the ability for users to create and join groups, and share editing rights. In sum, all users has two sets of data:

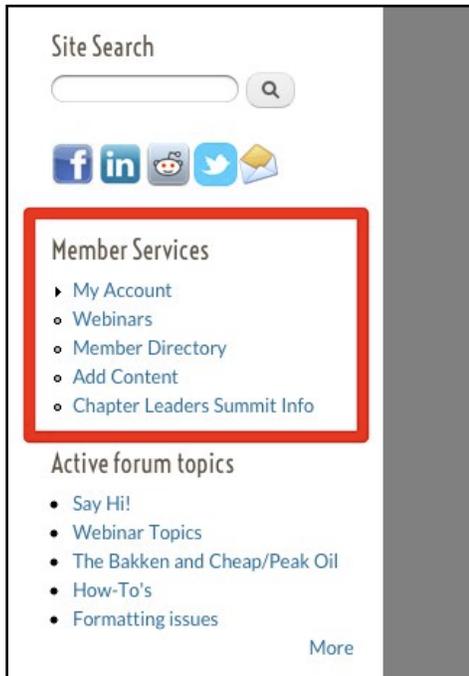
- A contact record in CiviCRM with detailed information, registration dates and membership status, and chapter identification
- A user record in Drupal with site permissions (creation, editing, visibility) and group memberships, particularly for appropriate chapters' content.

Site Registration:

If you were registered with our old site, your account is likely ported over. Try retrieving your username and password by going to (<http://www.eswusa.org/user/password>) and putting in the email you registered with.

If you have never registered with National, or are looking to register new members: Using the website technically only requires a Drupal account, which can be created at (<http://www.eswusa.org/user/register>). However, for active membership and for ease of use, it makes far more sense to create both a Drupal and CiviCRM record at the same time by registering as a chapter member at (<http://www.eswusa.org/civicrm/contribute/transact?reset=1&id=1>). This registration process is free so long as your chapter is in good standing, and should be relatively painless.

Once you have created an account and activated it using the emailed link, or reset your password for an imported account, you should see a new box of links in the right hand sidebar, just underneath the social media icons. You may need to log out and in again.



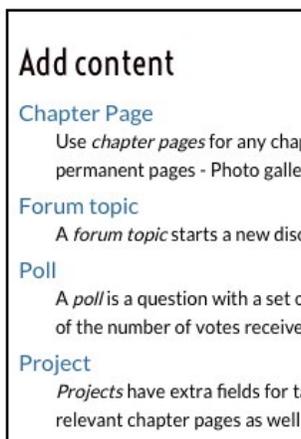
The rest of this guide is dedicated to the resources seen in this list.

My Account lets you edit settings for the site, as well as your personal information. There is an additional page of information on schools, service interests, etc. that is editable here but not part of the registration form.

Webinars will take you to the list of past webinars, along with access to recordings.

Member Directory lets you search active members of ESW (both chapters and paid professional and student-at-large members). You can search by school, city, and state, as well as by major. Contact information is hidden - if you want to contact someone, click on 'Website profile' next to their name and hit the 'Contact' tab at the top of the profile.

Various links may appear at the bottom of this list - this image is from just prior to the 2012 CLS, when that information was important. Generally, key events will have informational links here as well as other places on the site.



The final link here is the '**Add Content**' link. This does just what it suggests - lets you add material to the site. The following content types are relevant here:

Visible to all members:

- Forum thread (self explanatory)
- Project

Visible to chapter leaders only:

- Chapter Page
- Poll

Both Chapter Pages and Projects are designed to be attached to Groups (created by National Team members), which are normally chapters, and which individual users are added to (either by NT members or by group admins - generally chapter leaders).

Polls let you ask questions of the community - I don't expect that they'll be used too much (and I don't currently have them displaying anywhere), but if you want to make one and send out the link, you are welcome to do so. We might use them from the National level occasionally.

Projects are the heart of the organization (here Projects includes events and educational activities - this might eventually shift, but for now one content type is sufficient), and the Projects content type is designed to capture each and every project in a general template. Click on it and you'll see the information that it collects, which currently includes (in addition to title and general written content):

- Leaders (not currently contact-linked, but eventually)
- Status (used for sorting)
- Tags (pre-set list that I'm happy to add to)
- File upload (for final report or a zip file of documents)

Images can be embedded into the main text of the project (and we encourage you to do so!). Part of every project's wrap-up should be having someone enter it into the website. As long as that person is a member of the chapter's Group (and if they're not, email info@eswusa.org), you can attach it to that chapter and it will show up on the chapter's homepage automatically. If you want different fields or adjustments, let me know.

Chapter Pages are designed to be static content for chapters - they'll show up automatically in a list on the chapter's homepage (eswusa.org/chapters/XXXX), and are only createable and editable by chapter leaders. Use them for chapter photo galleries, overviews of leadership, ways for how to get involved locally, etc. If you want to host your website on our national page, this is how you'd do that.

In all cases, these content types should be pretty automatic - you shouldn't have a lot of extra options to worry about, and they'll self-sort based on site rules (it's part of the reason we're using a system like Drupal). That being said, if you run into problems, send me an email and I'm happy to help - info@eswusa.org is always your friend.