Login (updated February 2017)

You should log in via CAS which is the same login you use for myUSF and the old USFconnect functions.

1. Go to https://www.usfca.edu/user.
2. Click on “Log in using CAS” link.
3. If you are not redirected to CAS page, hit the yellow LOG IN button.
4. Log in with your myUSF username and password.
5. You are logged in to Drupal when you see the black control bar along the top of your screen.

Workbench – Events Search

We have set up an administrative panel for working with events. You can get there from your personal workbench menu.

1. Click the black bar on the MY WORKBENCH link. Click on the second menu item in the dropdown list: SEARCH EVENTS.
2. All events in the system will be found on this admin panel. The list defaults to showing most recently updated events first. Events can be filtered and sorted by use of menu items that appear above the list:
   - Event Title
   - Category
   - Group Type
   - Group Name
   - Building
   - Contact
   - Event Term
   - Published (yes/no)
   - Featured
   - Calendar Email
   - Event Date
3. Enter information for any of the sort menus, click green APPLY button to see results.
4. Find the event you are searching for in the listing.

   - To open the event for editing: click on the EDIT link in the far right column of the listing.
   - To view the event: click on the EVENT TITLE.
     - Events can also be opened for editing from the event view page. Go to the page editing menu in light gray on the main menu black control bar at the top of the window. Click EDIT DRAFT to open the event in the editor.
Alternate Way to Edit Events – Content Screen

This is the place where all content in Drupal winds up. You will have to sort or search from here to find your events.

1. Click the black bar on the **CONTENT** link.
2. The content list will show every type of content by default, unsorted in any way.
3. From the **TYPE** dropdown select **Events**. Click the **Apply** button.
4. List will now show all events sorted by creation date, with New and Updated events showing at the top of the list.
5. You can also filter the list by entering info in the title field.
6. Open event by clicking on the **Edit** link on the same row as the event on the right under the Operations column OR click the title of the event (the event details will display), then click **EDIT DRAFT** in the gray section of the top control bar.

UPDATED: Editing an Event

1. Select a **Section**. This will relate to your workflow and will trigger messages to your calendar manager. Either select an area related to your office or department at USF or select the section titled Event.
2. **Administrative Title** is the title you see in the edit window list. It is pulled in via EMS and is used as the title in RSS feeds that populate the calendar emails.
3. **Additional Info** is a text area that appears above the image. It is a rich text area that takes HTML formatting. It will have a green highlight on the left side, and any links will be green. It is excellent for instructions. Use it for things like registration links, parking info, and special instructions.
4. **Image** button is where you load an image for your event. The image will appear full width above the event description. It should be a high resolution image, not smaller than 775px x 436px. Images in this spot also become thumbnails for the Calendar page and populate other event feeds on the site.
5. **Body** is a rich text area. This is where you put all descriptive information about your event.
   - Follow good HTML practice and only use headers in descending order.
   - Inline images can also be inserted here. Click on the **Add Media** button on the far right of the tool bar. You can upload a new image or use one from the library. Set size of the image via the **Options -> Display As** dropdown menu on the second popup screen. Images align to the right by default with padding applied.
   - Be careful with cutting and pasting text into the body area as you can copy unwanted code. Always double check pasted coded by changing the Text Format dropdown menu to Full HTML to make sure code remains simple and clean.
6. **Event Category** is a taxonomy that adds events to the dropdown menu on the Calendar page. It helps populate sort options for the end user, as well as target calendar emails listings. You may select as many categories as are appropriate.

7. Select the appropriate **Target Audience(s)** for the event to populate the different versions of the calendar emails and the student-specific myUSF dashboards. Some of these options are not currently active (Alumni and Parents), but may be implemented in other newsletters.

8. **Sidebar Node Reference** can be used to call existing buttons and callouts into the right hand column of your event. Work with Web Services if you need to do anything like this.

9. **UPDATED: Event Terms** is a tagging system that creates lists of events. This is what populates feeds on web pages. To add an event term:
   - Click on the event terms box and either begin typing a term or scroll down to see all the available terms.
   - Select the appropriate term that matches the feed on your site.

   If you have any questions about this topic or need a new term added, please email webservices@usfca.edu and we'll be happy to assist with your request. Terms will be added within a 24-48 hour turnaround time.

10. **Which website(s) should this display on?** These options determine whether the event should be included in listings on the marketing website (USFCA) and the intranet (myUSF). myUSF is selected by default.

11. **Feature in calendar on USFCA.edu?** Selecting Yes causes a yellow highlight in the Calendar page view. Featured event should be reserved for items that have an image and great descriptions and are Admission related, broadly appealing public events, and the most select events of SLE, Alumni, and Giving.

12. **Include in calendar emails?** These options determine whether the event should be included in the calendar emails that faculty, staff, and students receive. Standard is selected by default. To be featured in the calendar emails, the event should have an image and great description and be open to the entire USF community (don't forget to check "USF Community-Wide" under Category). Standard is selected by default.

13. **Below Content Carousel** is where you can create a slideshow of images in your event. This is appropriate for events that recur for example. Give the slideshow a title in the Below Content Carousel Title field. Click Attach Media to load images, then apply crops to each image selected. Image title tag creates captions.

14. When done populating the form click "Save." This will send a notice to your calendar manager who can publish the event to the calendar.

### Updated: February 14, 2017
https://myusf.usfca.edu/marketing-communications/training-resources/events-drupal
User Roles, Workflow, and Publishing

- Most users have the role of Author. Authors can edit any element in the event form as described above, but cannot publish the event to the live calendar. Publishing is reserved for the Calendar Manager role.
- When an Author is done editing and hits Save on the event, their Calendar Manager is sent the event for review and publishing via My Workbench.

Author Role

1. Edit the event as above.
2. At the bottom of the form, click in the gray box area on the tab “Revision Information”.
3. If you are still working on the event and just want to save your current edits and come back later, under Moderation State set the dropdown to Draft. Hit Save.
4. If you are done editing and ready to send out for publishing, under Moderation State set the dropdown to Needs Review. Hit Save.

Managing Workflow in Your Section

1. Click on the My Workbench tab in the top black control bar.
2. You can see any events you have worked on from this interface.
3. Click Needs Review in the gray area on the far right of the top black control bar area. Any events your Calendar Manager has sent back to you for further editing will show up here.
4. Click on the event title to open the event. Click Edit Draft in the gray part of the top control bar area. Edit the event and when done change moderation state back to Needs Review to send back to your Calendar Manager.

Calendar Manager Role

1. You have the same edit ability as the Author role, plus you can edit any event worked on by an Author within your Section.
2. From the form itself you can publish directly. Click the Revision Information tab at the bottom of the form and under Moderation State you will have a third option “Published” in the dropdown. Select this to publish directly after editing an event. Hit Save.

Managing Workflow in Your Section

1. Click on the My Workbench tab in the top black control bar.
2. Click Needs Review in the gray area on the far right of the top black control bar area.

3. Any events from Authors within your section that have been sent to you for approval will appear in the list on this page. You can see the event and who worked on it from this interface.

4. Click on the Event Title in the list.

5. The event will open in its draft state (if there is pink behind the event, it’s in draft state). Review the event for content, tagging and styling.

6. If the event is good to go, in the yellow bar above the event draft click on the dropdown menu and select “Published” then click the gray Apply buttton.

7. If the event needs additional editing by the Author, return to My Workbench and under Set Moderation State click on Change to Draft in the row for that event.

8. The event will leave your work area and return to the Author. When they make additional changes and send it back for approval it will return to the Needs Review area of your workbench. You can then publish when you are ready.