Website Tutorials

Content management is the administration of digital content throughout its lifecycle, from creation to storage or deletion. The content involved may be images, video, audio and multimedia, as well as text. These tutorials will guide you through updating and adding content to the DFR website.

Website Management Overview

The purpose of the Vermont Department of Financial Regulation's website is to advance the department's mission while communicating with both the financial entities and the general public to ensure we help that protect consumers while ensuring industry partners operate in a responsible manner. The website is intended to be dynamic and user-friendly with relevant content, universally accessible to all users.

The website is not intended to serve as a permanent document repository, a collaboration space, or an archive for social news.

http://financialregulation.vermont.gov
http://dfr.vermont.gov

Responsibility

At the direction of the DFR Commissioner, the web manager, shall develop, maintain, and manage the official new DFR website. The web manager will consult with the leadership team and agency staff in the development and management of website, as needed. The web manager will coordinate with web liaisons to provide help implementing these guidelines.

Goals and Requirements

All DFR official websites must:
- Support and/or promote the mission and vision of the Department of Financial Regulation;
- Adhere to all relevant agency, State of Vermont and federal policies or laws;
- Have an internet domain name owned and registered by the State of Vermont;
- Be responsible for copyright compliance;
- Be accessible to users with disabilities; and
- Ensure the privacy and security of personal information.

Table of Contents

Web-Based Content Management System

The DFR website was created by a state contractor, Vermont Information Consortium, using a web-based content management system called Drupal.

To access and update the DFR website use either Google Chrome or Mozilla Firefox as a web browser. It is recommended that you **avoid using Internet Explorer and Edge**.

Login

To login, go to the login page: http://dfr.vermont.com/login. Use your assigned username, usually your full work email address and password.

If you forget your password, use the link to request a new password.

While the site is still in production, use this link to login: http://finreg.vcms.vt.dev.cdc.nicusa.com/login.

Find Content

Select Find Content in the top left corner.

Enter the criteria that fits the content you are searching for and Apply.
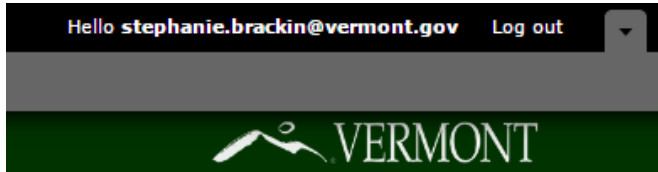

Search Content

To search for information, use the search bar in the top right corner and click Search.

Logout

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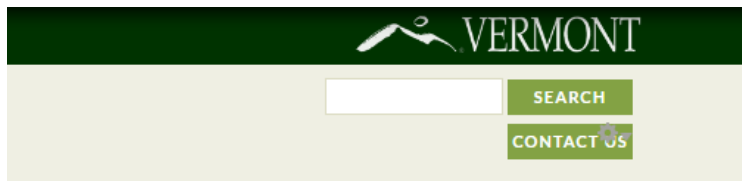
In the top right corner, click Log out.

Edit a Page

To edit an existing page, navigate to the page you wish to edit. Click the edit tab on the page. (You must be logged in to see the tabs.)

Step 1

Navigate to the page and select Edit.

Step 2

To edit only the text or links within the Body of page, use the WYSIWYG editing tool.

Step 3

Use the built-in Spell Check.

Step 4

Any time you paste text into the editor, use this tool to **paste as plain text**.

Step 5

Use the preformatted tools for numbering, bullets and styles.

Step 6

Save your edits.

More detailed information will be addressed in the section for Creating a New Page.
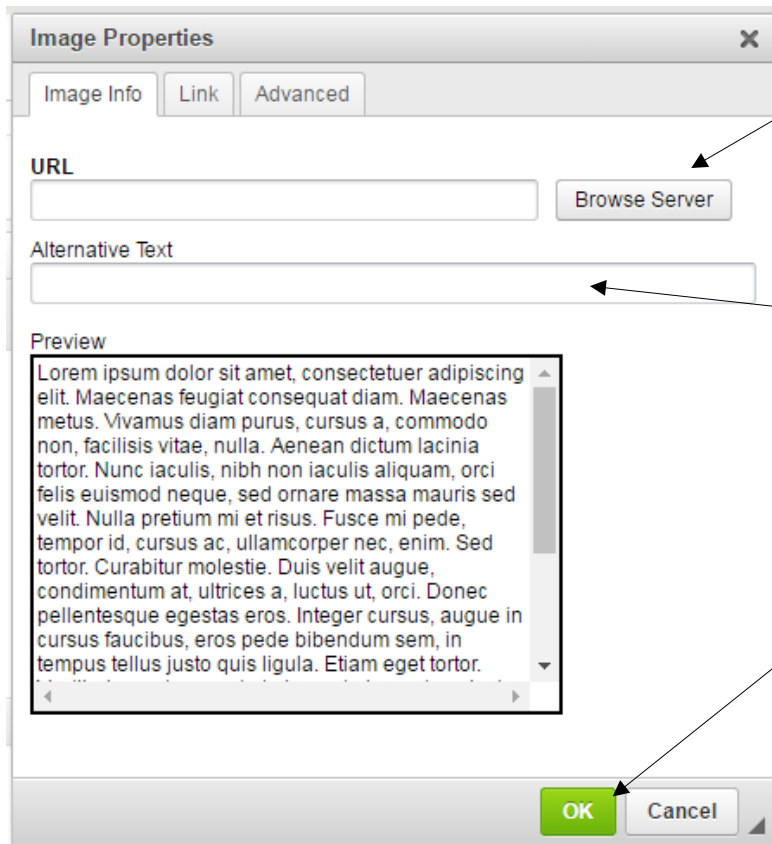
Add an Image

To edit an existing page, navigate to the page you wish to edit. Click the edit tab on the page. (You must be logged in to see the tabs.) Note, please size your image before uploading it. Images should be no larger than 300 pixels.

Step 1

From the WYSIWYG editing tool, select the image icon.
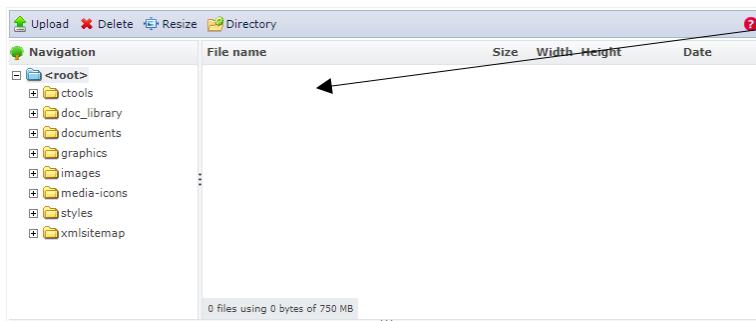
Step 2

From the pop-up box, on the Image Info tab, select Browse Server.

Step 4

Once the image is uploaded, enter Alternative Text. This is a short description of the image and is important for visitors that are visually impaired.

Step 5

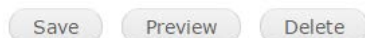Once complete, scroll to the bottom of the edit page and click Save.

Step 3

Select an image and click Insert File.

Or Select Upload and browse to a new file to add.

When the image is placed, you may use the drop-down Styles option to align the image to the left or to the right. Once complete, scroll to and click Save.

Add a Hyperlink

To add a hyperlink, you must edit the web page. Navigate to the page you wish to edit. Click the edit tab on the page. (You must be logged in to see the tabs.)

The following have specific directions to create to links to:

- External websites,
- Internal webpages and documents,
- Anchors within the webpage, and
- Email addresses.

Tips and Reminders

- Every link must have "linking text" that is descriptive. Avoid spelling out the full URL address. Avoid using "click here" or other generic phrases.
- Do not add links to **Headings**.
- Even for email address, use linking text. For instance, use the intended recipient's name, [Stephanie Brackin](#).

Link to an External URL
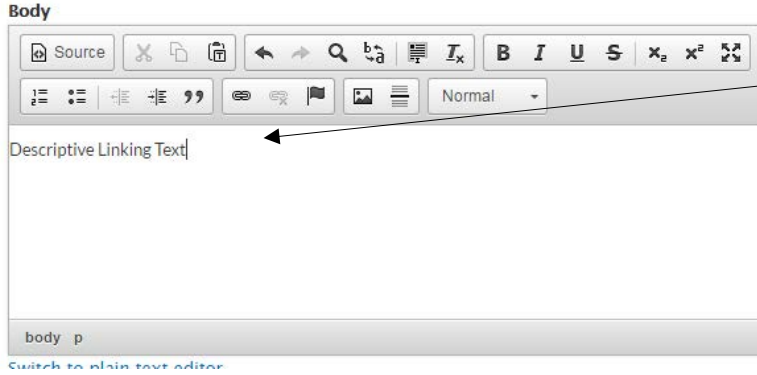
Step 1

From the WYSIWYG editing tool, select the hyperlink icon.
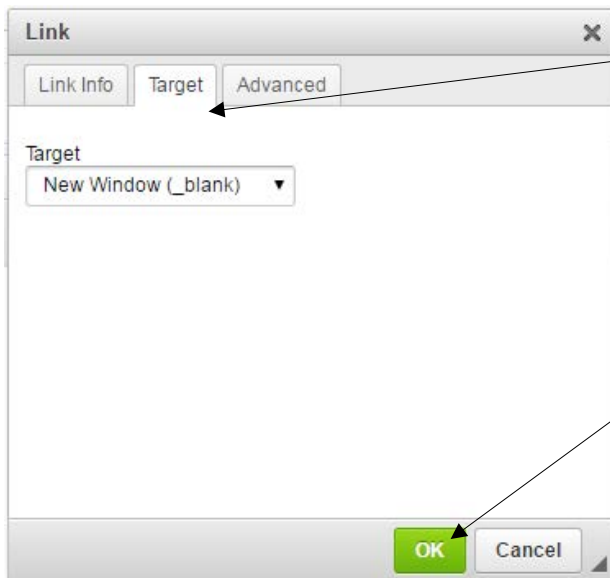
Add descriptive linking text

Step 2

From the Link Info tab, select the Link Type as URL, anchor or email. Depending on which type you select the options will change.

Step 3

If the link is pointing to an external URL, copy and paste the full URL into the field, including http://sample.website.address.com.
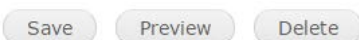
Step 4

Then select the Target tab. Change the target to New Window (_blank).
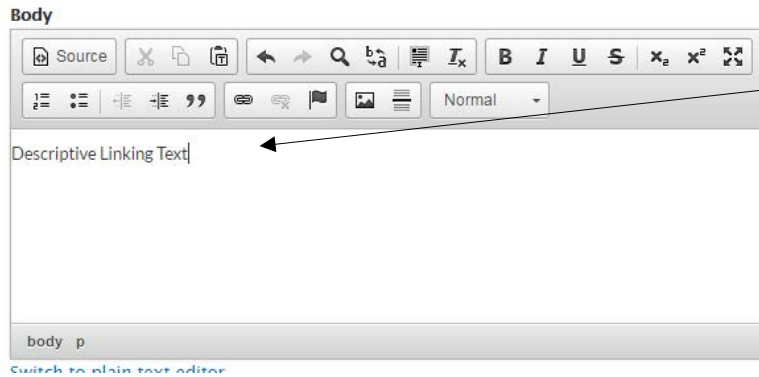
Step 5

Click Ok.

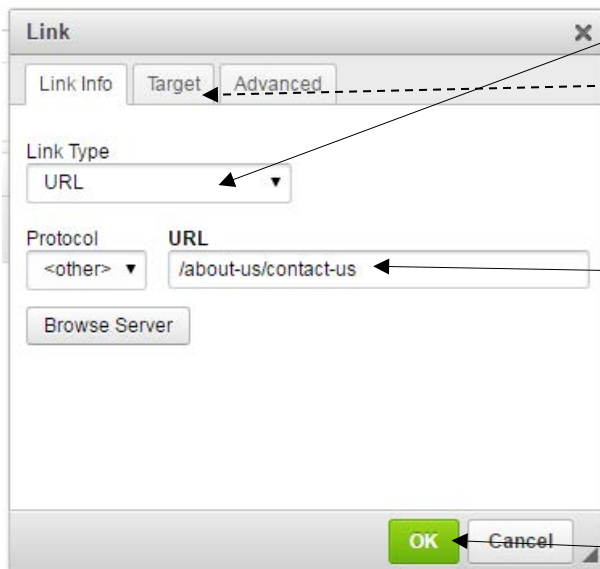Once complete, scroll to the bottom of the edit page and click Save.

Link to an Internal Webpage or Document

Step 1

From the WYSIWYG editing tool, select the hyperlink icon.

Add descriptive linking text

Step 2

From the Link Info tab, select the Link Type as URL, anchor or email. (Do not set the Target for internal web pages. Set a target for PDF documents.)

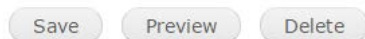**Step 3**

If the link is pointing to a webpage within our website, enter the page URL without the domain name. For example, this internal link http://education.vermont.gov/about-us/contact-us **becomes** /about-us/contact-us.

Step 4

Click ok.

Once complete, scroll to the bottom of the edit page and click Save.

Link to an Anchor

Part 1: Create the Anchor

An anchor is the establishing of a term or phrase which will become a target for a hypertext link on a webpage. Anchor links can be helpful when you want to bring a website visitor to a specific spot on a page.

Navigate to the page you wish to edit. Click the edit tab on the page.
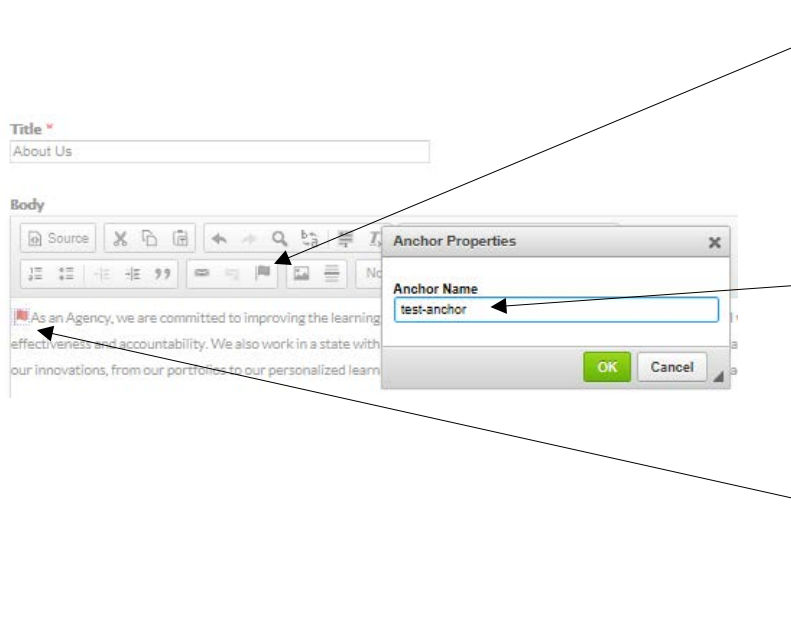
Step 1

Place the cursor in the body of the text where you want to create the anchor. From the WYSIWYG editing tool, select the anchor icon.
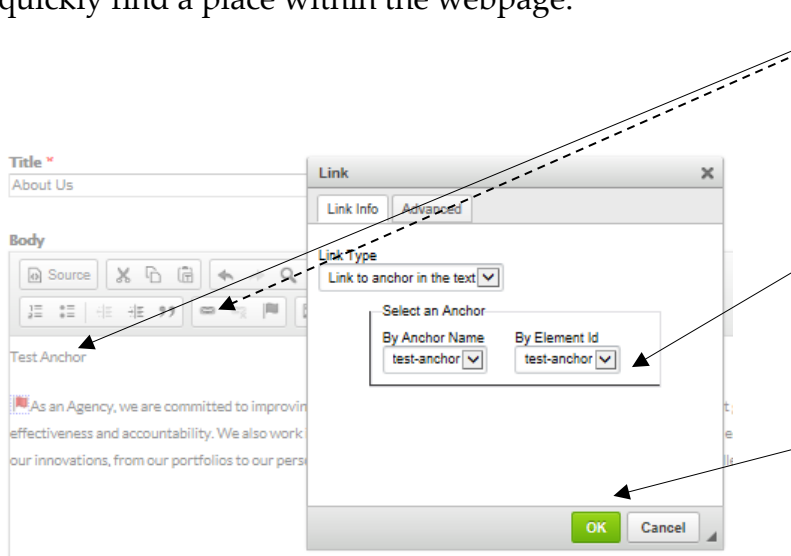
Step 2

Enter the anchor name, using all lowercase letters and no spaces, use hyphens instead.

Step 3

Once complete, a flag will appear in the anchor location.

Part 2: Link to the Anchor

Now you need to link to the anchor that you just created above to allow visitors to quickly find a place within the webpage.

Step 1

Select the text you want to use for the link. Then use the Link icon and select the Link Type as Link to anchor in the text.

Step 2

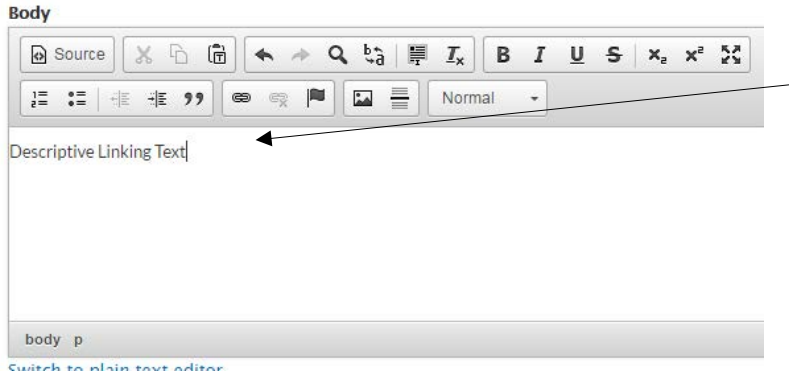Select an existing Anchor (see the directions above to create an anchor) by Anchor Name.

Step 3

Click ok.

Once complete, scroll to the bottom of the edit page and click Save.
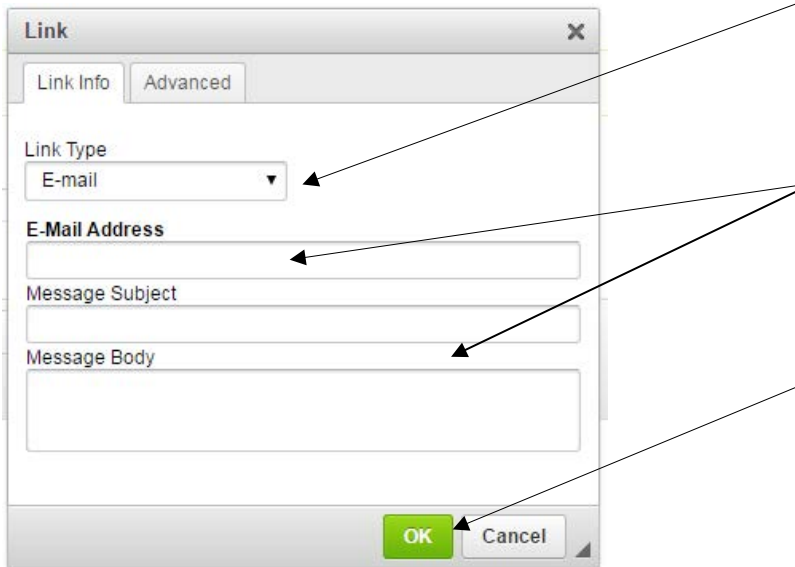
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Link to an Email Address

Step 1

From the WYSIWYG editing tool, select the hyperlink icon.

Add descriptive linking text

Step 2

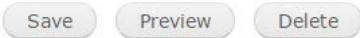From the Link Info tab, select the Link Type... Email.

Step 3

Add the full email address. Include a default subject or body text, if you choose.

Step 4

Click ok.
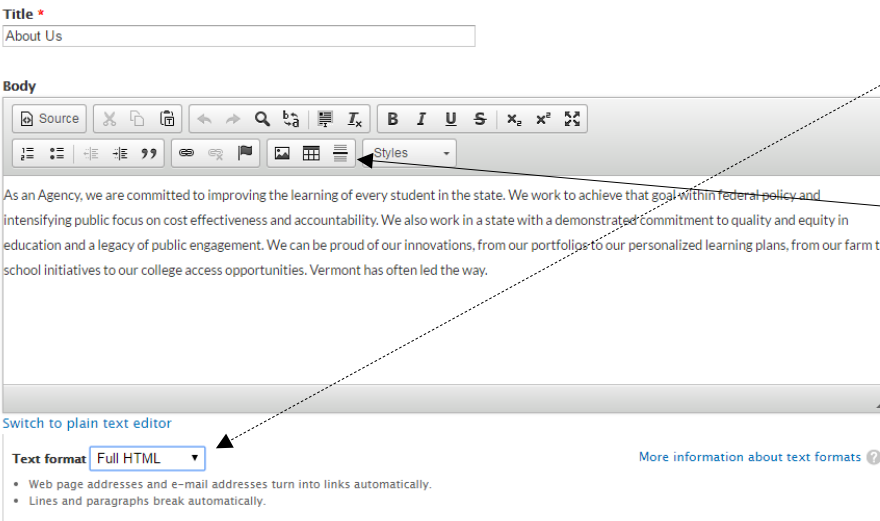
Once complete, scroll to the bottom and click Save.

Add a Horizontal Line

Navigate to the page you wish to edit. Click the edit tab on the page.

The line can be used to separate content, ideas or information. *Note: Horizontal lines should be used sparingly on a website. Only website administrators may use Full HTML.*

Step 1
Change the text format to Full HTML.

Step 2
Click the Horizontal Line icon. This will add the line.

Once complete, scroll to the bottom and click Save.

Add a Document

From the management bar at the top of the website, select Add content. (You must be logged in to see the management bar.)

Remember documents uploaded to the DFR should be on a branded DFR template.

Step 1
Select Add content, and then select Document.

Select Document.

Step 2
A document name is required, as demonstrated by the red asterisk. Keep the name brief, but descriptive.

Step 3
Upload the document. It must be less than 500 MB in size and match one of the file types listed.

Step 4
Select the file format: Text, PDF, Presentation, Spreadsheet, etc.

Step 5
Add the date. Either the date the document was posted or revised or disseminated to the public.

Step 6
Tag the document, as needed. This allows the documents to be aggregated.

Step 7
Skip the thumbnail image.

Description

Category
- None -

URL path settings
Alias: documents/example-of-path-setting

☐ Generate automatic URL alias
Uncheck this to create a custom alias below.

Revision information
No revision

URL alias
documents/example-of-path-setting

Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.

Authoring information
By stephanie.brackin@vermont.gov

Publishing options
Published, Promoted to front page

Step 8
If the document cannot be made accessible, use the following caveat in the Description field: "*Should you experience any difficulty in accessing this document, please don't hesitate to contact us. We will work to provide information to you in an alternative format.*"

Step 9
Uncheck the automatic URL alias. Enter a unique URL beginning with *documents/* and using the naming protocol:
- Lowercase,
- No spaces, and
- Dashes.

Once complete, scroll to the bottom of the edit page and click Save.

Save   Preview   Delete

Update or Edit a Document

To edit an existing document, navigate to the document landing page you wish to edit. Click the edit tab on the page. (You must be logged in to see the tabs.)

Step 1

Navigate to the page and select Edit.

Step 2

Update the information, as needed.

Step 3

To upload a new document, first, remove the document.

Then click Save.

Step 4

Click Edit, again.

Step 5

Choose a new file and upload.

Step 6

Update the information, as needed.

Note: It is necessary to save first before uploading the new document to ensure the old document is properly removed from the server files.

Add a Basic Event

From the management bar at the top of the website, select Add content. (You must be logged in to see the management bar.)
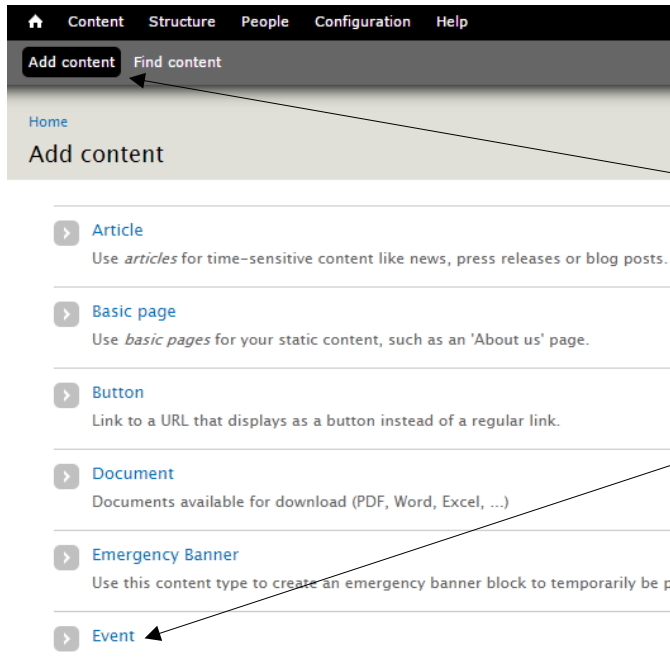
Step 1
From the administrators bar at the top of the website, select Add content.

Step 2
Select Event and begin entering the event information.

Step 3
Enter a descriptive title. A title is required, as demonstrated by the red asterisk. It is okay to use the same title more than once, such as the case for State Board of Education meetings.

Step 4
Enter the event details in narrative form.

Step 5
Select the event type, as follows:
- Professional Learning
- Training
- Testing
- Grant
- Data Collection
- Meeting
- Other
- Public Comment
- Conference

Location

- None -

If applicable, select the location of the event.

EVENT DATE

☐ All Day ☑ Show End Date

Date	Time
2016/11/21	02:45pm
E.g., 2016/11/21	E.g., 02:45pm

to:

Date	Time
2016/11/21	02:45pm
E.g., 2016/11/21	E.g., 02:45pm

☐ Repeat

URL path settings
Alias: calendar/sample-event-url

Revision information
New revision

Authoring information
By stephanie.brackin@vermont.gov

Publishing options
Not published

☐ Generate automatic URL alias
Uncheck this to create a custom alias below.

URL alias
calendar/sample-event-url

Optionally specify an alternative URL by which t̶
type "about" when writing an about page. Use a
the URL alias won't work.

Save   Preview

Step 6
Then select the location of the event, which actually represents which board, council, or team is hosting or sponsoring to the event.

If an option doesn't match your needs, leave this blank.

Step 7
Enter the event date and time. If the event repeats, enter the scope of the additional events.

Step 8
Uncheck "Generate automatic URL".

Step 9
Type in your URL for the event, starting with calendar/.

Step 10
Using the Publishing options tab, select Publish. Then select Save.

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Add an Article

Follow these procedures for adding Articles, another name for news items. Some Articles, such as press releases, memos, white papers, newsletters and op-eds include a corresponding document with the full information. For those Articles, it is a two-step process. Use these instructions for all Articles, except for the Weekly Field Memo.

Add the Document for an Article

Use the same instructions for uploading documents, with these additional steps.

Create Document

Document Name *

File

Choose File | No file chosen | Upload

Files must be less than **500 MB**.
Allowed file types: **txt pdf doc docx xls xlsx ppt pps xml rtf epub mp3 zip pptx**.

File Format *
- Select a value - ▼

DATE

Date
12/07/2016
E.g., 12/07/2016

Optionally add a date for the attached file

Description

Category
- None - ▼

URL path settings
Alias: documents/example-of-path-setting

□ Generate automatic URL alias
Uncheck this to create a custom alias below.

Revision information
No revision

Authoring information
By stephanie.brackin@vermont.gov

Publishing options
Published, Promoted to front page

URL alias
documents/example-of-path-setting

Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.

Step 1
Upload the document. It must be less than 500 MB in size and match one of the file types listed. Make sure the document has passed accessibility.

Step 2
News items should be uploaded as PDFs.

Step 3
Add the date the news items was disseminated to the public.

Step 4
If the document cannot be made accessible, use the following caveat in the Description field: *Should you experience any difficulty in accessing this document, please don't hesitate to contact us. We will work to provide information to you in an alternative format.*

Step 5
Select the corresponding Category: Memo, Press Release, OpEd, Newsletter, or White Paper.

Step 6
Uncheck the automatic URL alias. Enter a unique URL beginning with *documents/* and using the naming protocol.

Add a News Item

Step 1

From the administrators bar at the top of the website, select Add content.

Step 2

Select Article.

Step 3

Enter the Article title and Summary.

Step 4

Enter a short portion of the news; a few paragraphs.

At the end, add a sentence that says, "Read the full memo." (Or press release, white paper, etc.)

Link to the news item document.

Step 5

Add the date the news item, Article, was published.

Tags

- None -
Agenda
-Agenda Item: State Board of Education
-Agenda: Consolidated Federal Programs Committee of Practitioners

Please click to make selection. To select more than one hold down control while clicking.

Category *

-Memos

URL path settings
Automatic alias

Revision information
New revision

Authoring information
By stephanie.brackin@vermont.gov on
2017-03-10 09:51:50 -0500

Publishing options
Published

☑ Generate automatic URL alias
  Uncheck this to create a custom alias below.

URL alias
memos/smarter-balanced-assessment-testing-window

Optionally specify an alternative URL by which this content can

Save Preview Delete

Step 6
Select the corresponding Category:
Memo, Press Release, OpEd,
Newsletter, or White Paper.

Step 7
The system will generate a URL
automatically.

Step 8
Save.

*Note: The Article will appear on the Home page under Latest News and under the corresponding
widget on the Communications page.*

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Create a New Page

Generally, the Web Manager will add new webpages. If you need a new page, please coordinate with the Web Manager to ensure the page is placed within the website information architecture correctly.

Step 1

From the administrators bar at the top of the website, select Add content.

Step 2

Select Basic Page.

Step 3

Create a descriptive title for your page. Avoid acronyms.

Step 5

Enter your content, included text, images, lists and links.

Use established styles. Avoid tables.

Step 6

Determine the text for the Menu Link.

Select where the page will be nested.

Select the weight of the menu item, i.e. where it will appear in the list.

Slideshow

- None - ▼

If displaying a Slideshow on this page, select what Category of images to display in the slideshow.

Menu settings	
URL path settings No alias	
Revision information New revision	
Authoring information By stephanie.brackin@vermont.gov	
Publishing options Not published	

☐ Generate automatic URL alias

Uncheck this to create a custom alias below.

URL alias

Optionally specify an alternative URL by which this ⬚

Save   Preview

Step 7

Uncheck "Generate automatic URL alias."

Type in your own URL using the corresponding pathway, of where you page is nested.

For example:
about-us/communications

Step 8

Save.

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Other Website Actions

The website can also be edited to include or modify other features. Please contact the Information Management Office to make changes (edits, additions or removal) to the following items:

- Widgets
- Tags
- Categories
- Homepage Slides
- Slideshows
- Embedded video
- Events
  - Public Comment
  - Data Collections