

# Getting Started with the ADOA-ASET Agency Platform Websites

Guide to the core concepts  
and functions



Table of Contents

The Basics

Customization Options

Change Management

Business Processes

Additional Resources

Site Analytics

The Basics ..... 2

Customization Options ..... 4

Change Management ..... 17

Business Processes..... 19

User Training ..... 24

Additional Training Resources..... 41

Site Analytics..... 43

# The Basics

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What is a CMS

What is Drupal

What are Dev and Prod environments

Drupal Roles and Permissions

## What is the ADOA-ASET Agency Platform?

A platform can be defined as a combination of hardware architecture and software framework which together provide a set of core, reusable capabilities and services . A platform also creates a base for other technologies or processes to be built. With that understanding, the ADOA-ASET Agency Platform is an open platform with documented interfaces. This open structure enables anyone to build on top of the platform and encourages data-sharing between agencies. The Agency Platform is flexible and extensible to integrate with other existing agency systems.

## What is a CMS?

CMS stands for Content Management System. It is a computer program that allows publishing, editing, and modifying of content on a website within a collaborative environment.

## What is Drupal?

Drupal is a free and open-source content management framework. It's a multi-user, web development CMS which features provide a webmaster with a diverse set of easy to use capabilities. It's used by thousands of high profile web sites, including whitehouse.gov. Drupal is also a secure system which is regularly

subjected to security testing by both the Drupal community and security experts around the world.

## What are Dev and Prod environments?

The Dev (Development) environment is where configuration changes to the structure of the website are made and tested. When completed, the content is pushed to the Prod (Production) environment, which is where final site data is stored for interaction with the website audience.

## Drupal Roles and Permissions

### What are roles?

Drupal has two basic roles, anonymous users, and authenticated users. The State agency Drupal distribution adds three additional roles, editor, contributor, and power user.

Each role is assigned a specific set of permissions. Permissions control what users can do on the site.

### Anonymous user:

This role is used for users that don't have a user account or are not registered on the site. Anyone that visits a Drupal site is considered an anonymous user until they login.

### Authenticated user:

This role is automatically granted to all logged in (registered) users. Therefore, all permissions assigned to the authenticated user role will apply to all registered users.

### Contributor:

The contributor only has permission to create and edit their own content and cannot publish content, edit content created by others, or make any configuration changes to the system.

### Editor:

The editor can create, modify and publish content.

### Power User:

This role is designed for agencies with technical staff capable of performing limited configuration changes to the site.

### Administrator:

This role can create content, new pages and views, change appearance settings, create user accounts, etc.

# Customization Options

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Templates, Themes, and Colors

Template Structure

Layout Options

Navigation

Included Content Types

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### What are templates?

Templates are design themes that are installed into the Agency Platform to customize the look and feel of the website. Content in the site is mapped to various regions of the template providing a clean, consistent, easy to use and navigate site.

### Template Themes and Colors

You may choose from one of two basic themes and apply one of ten color palettes. The templates were specifically designed to support a varied range of agency types from government and political to educational and historical. The color palettes were inspired from photographs of a variety of cities and townships throughout the State of Arizona.

#### AZ Government Template



#### AZ Branded Template



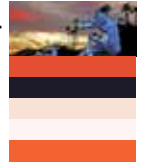
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##### Scottsdale

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#fef2ef  
#f16330



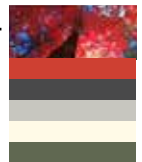
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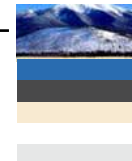
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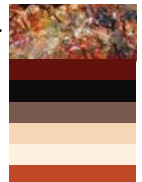
##### Flagstaff

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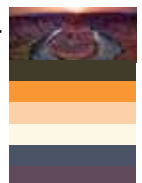
##### Strawberry

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#d2bfab  
#fcf6e5  
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#403b28



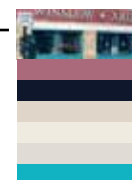
##### Page

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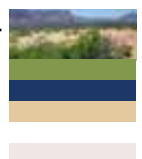
##### Winslow

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#eee8de  
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##### Douglas

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#f4973a  
#fcd1a7  
#fcf8e5  
#4b5467



## Template Structure

### Sliver:

The sliver provides access to a directory of State Agencies, a comprehensive listing of State Services, search capabilities across az.gov and collects full site analytics.

### Header:

Agencies can upload a logo and/or display a site name and slogan. If no logo is selected, the State seal will appear by default.

### Home Page Feature:

Customizable home page slide show.

### Preface:

The preface highlights important or popular content.

### Main Content:

The standard configuration is shown here. Content can be displayed in a variety of layouts.

### Footer:

The footer echoes header settings for logo, site name, and slogan. It also contains a utility menu for site map, privacy policy, and a postcard containing agency contact info. "Follow" links contain optional agency social media connections.

### Sliver Header

1. Logo
2. Site Name & Slogan
3. Main Menu

### Home Page Feature

### Preface

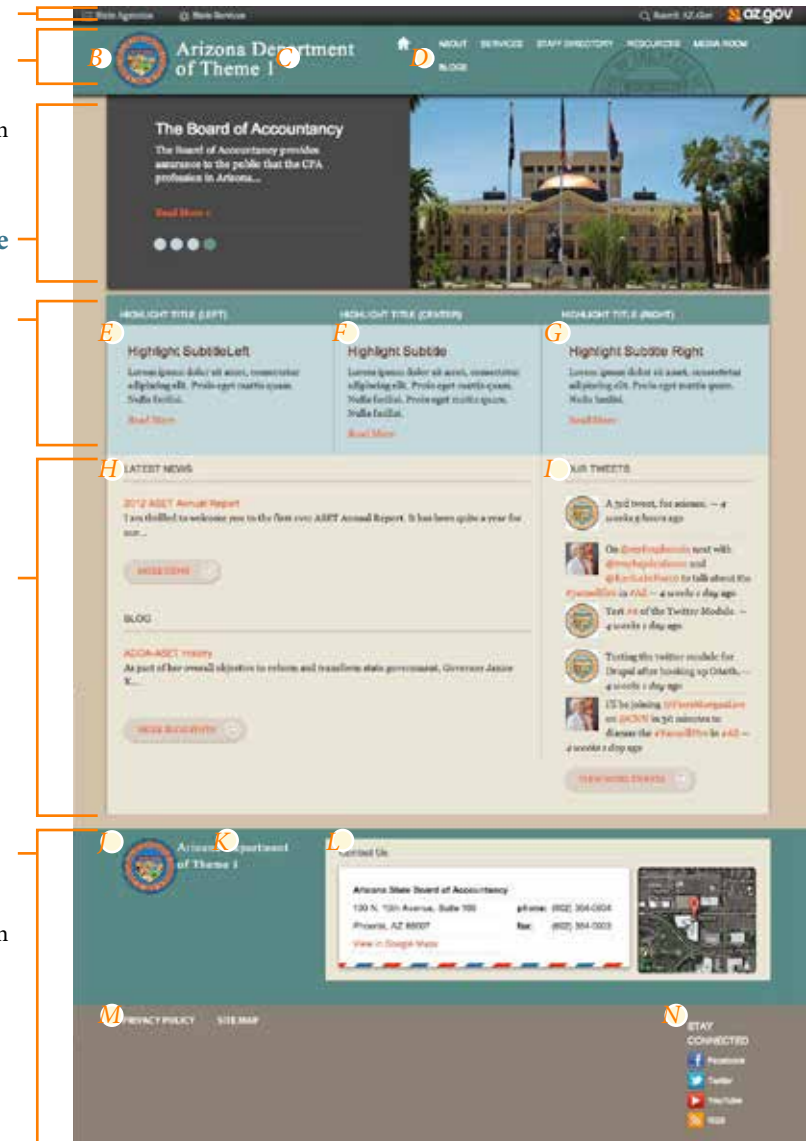
4. First
5. Second
6. Third

### Main Content

7. Content
8. Sidebar Second

### Footer

9. Logo
10. Site Name & Slogan
11. Postcard
12. Utility Menu
13. Follow Links



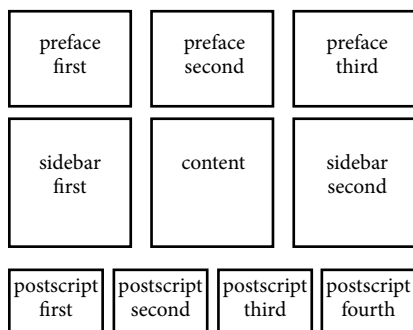
### Content Layout Options

The template allows for a wide variety of layout patterns by implementing different regions. Several options are illustrated here.

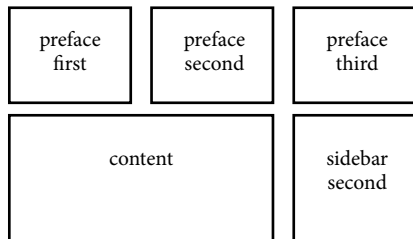
Note:

The content, preface, and postscript regions expand or contract depending on whether or not neighboring regions are utilized.

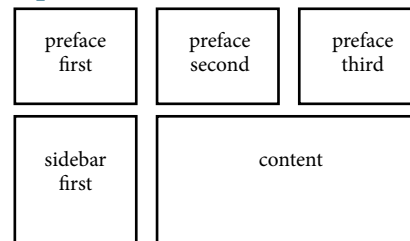
#### Default Content Regions:



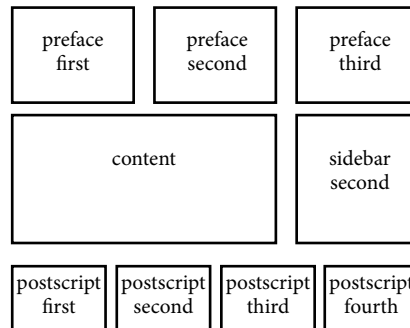
#### Standard Layout:



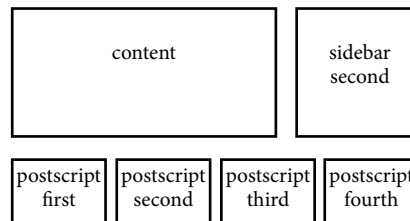
#### Option 1:



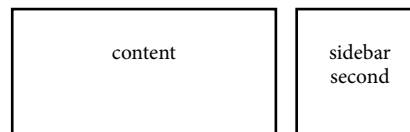
#### Option 3:



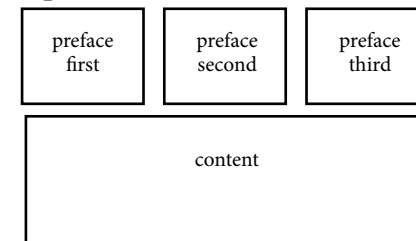
#### Option 5:



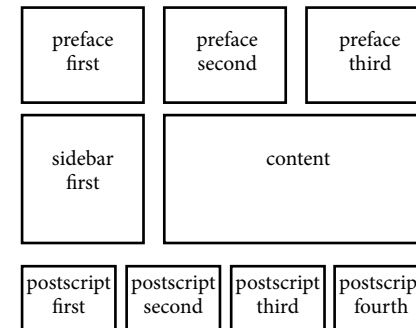
#### Option 7:



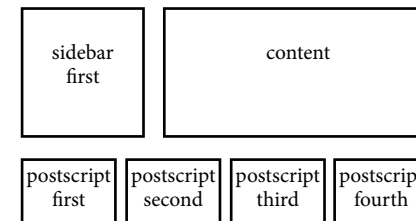
#### Option 2:



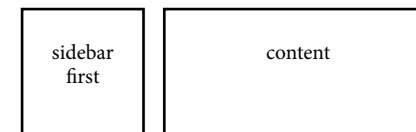
#### Option 4:



#### Option 6:



#### Option 8:





The Basics

Customization Options

Change Management

Business Processes

Additional Resources

Site Analytics



## Navigation (Menus)

The following navigation system is built into your new website. To conform to best practices in responsive design, it is recommended for the site to remain within these guidelines for best the user experience on smaller screens:

- The site allows for up to six horizontal main menu items in addition to the Home link
- Each main menu item can contain up to five submenu items
- Breadcrumb trail navigation is automatically included for all menus and submenus
- The footer contains a utility menu for privacy policy and site map.

## What is a Content Type?

Content types are how site editors can input original content for display on a Drupal site.

## Included Content Types

Each new site has three content types pre installed however custom content types can be created for specific needs.

### Basic Page

Typically basic pages are used for static content that can be linked to the main navigation bar. Basic pages can be styled and contain:

- Images
- Videos
- Documents
- Accordion lists
- Menu tabs

### Basic Block

Basic blocks are typical small content sections that can be applied in a variety of regions and pages on your site. Basic blocks can be styled and contain:

- Images
- Videos
- Documents
- Accordion lists

### Basic Slideshow

Basic slideshow creates a rotating series of images that is typically placed below the header of the home page, however slideshows can be created on any page and any region of your site.

The  
Basics

Customization  
Options

**Change  
Management**

Business  
Processes

Additional  
Resources

Site  
Analytics

# Change Management

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Overview

Development

Production

## Overview

There are two basic types of site changes, content and architectural. The majority of changes will be content, meaning simple website content such as text, images, and links added or modified within the site's existing structure. These changes can be handled directly by the site owner within the content management system.

Architectural changes tend to be structural in nature and include things such as adding or editing views, menus, or modules. Due to their complexity, architectural changes fall outside of the scope of content management and may require the agency engaging with the following change management process:

### Change Management Process:

The change management process in systems engineering is the process of requesting, determining attainability, planning, implementing, and evaluating changes to a system. It has two main goals: supporting the processing of changes and enabling traceability of changes, which should be possible through proper execution of the organization's established process.

### Development (DEV)

DEV changes will require approval of the business owner, and can be executed during a scheduled change window during business hours as long as the change will not impact any non-related systems (ie. Changes on shared web hosting servers that require a server reboot).

### Production (PROD)

Production system changes will require the following:

1. A completed Service Desk request.
2. A Change Control Form (CCF) must be reviewed by the business owner and the technical resources that will execute the change. The CCF should be attached to the Service Desk request.
3. Review and approval by the Change Advisory Board (CAB) must be received prior to any changes taking place. The CAB meeting takes place every Thursday morning at 9 a.m. to review and approve all new and

ongoing change requests.

4. Approval from the business owner, and an agreement to make a resource available from the business owner user group to test all changes during the designated change window.
5. Approval from the technical resource groups that will be involved with the change to confirm that they will have resources available during the requested change window.

For more information visit the [Change Advisory Board](#) page on the ADOA-ASET website.

The  
Basics

Customization  
Options

Change  
Management

**Business  
Processes**

Additional  
Resources

Site  
Analytics

# Business Processes

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Agency Engagement

Migration Planning Pre-work

Agency Content Cleaning Check List

Migration Planning

Content Migration

Validation and Sign-off

Agency Operational Support

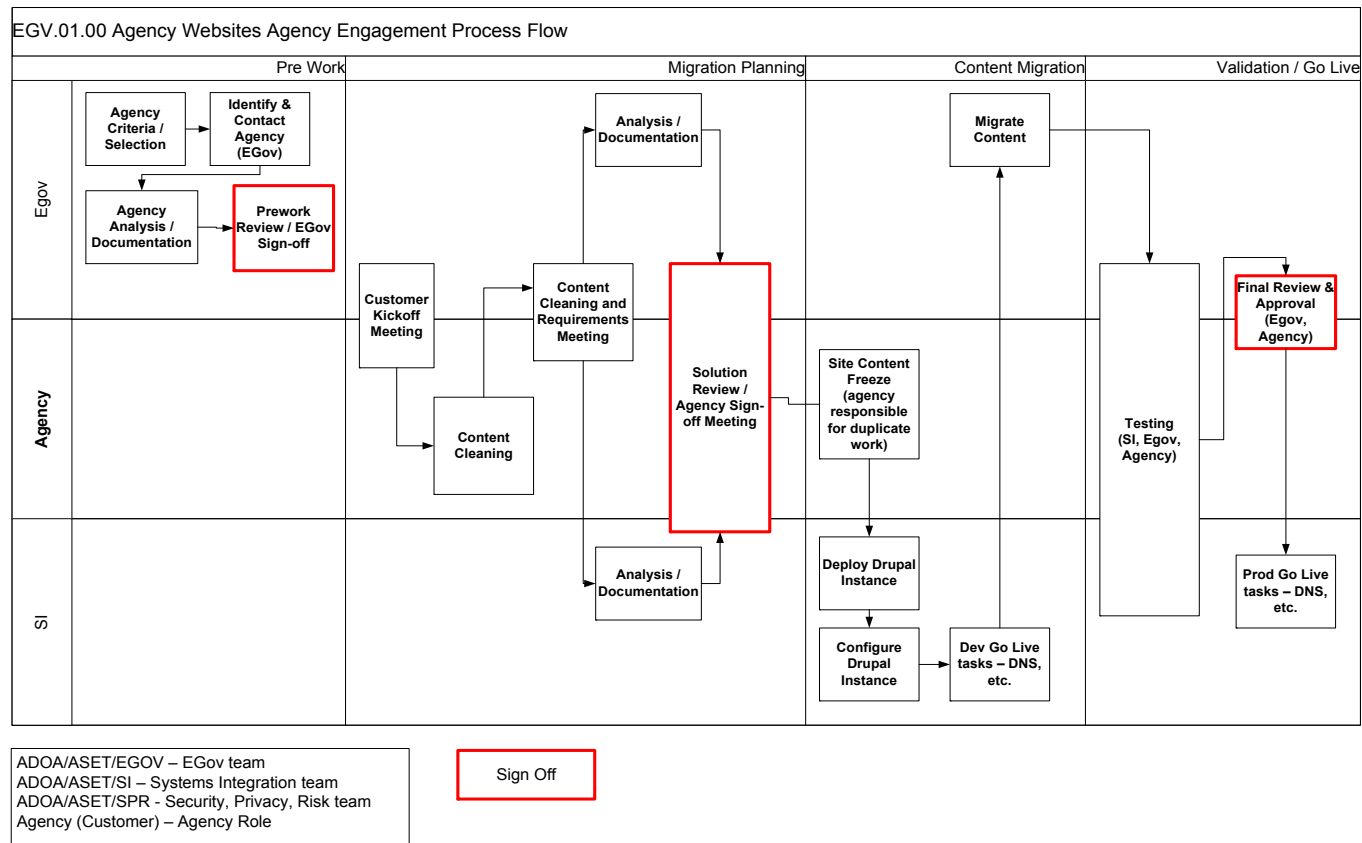
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Section  
Contents



## Agency Engagement

The process of planning, engagement, migration and sign off of an Agency website



### Migration Planning Pre-work

- Agency analysis / documentation
  - Pre-work documentation that can be completed prior to meeting with agency
  - Digital Government team reviews pre-work materials before meeting with agency
  - Pre-work review / Digital Government team sign-off

### Migration Planning

- Customer kick off meeting
  - Overview of process
  - Estimated timelines
  - Resource needs (agency and ADOA-ASET)
  - Review pre-work documentation
  - Advantages – selling points
    - Cloud-based solution
    - Built-in resiliency and scalability
    - Site backup and restoration
    - Making own site Changes
    - Responsive design

Integrated dynamic functionality  
Basic content approval workflow

Costs  
One-time  
Ongoing

- Agency content cleaning
  - Reduce / eliminate Unneeded sections / outdated material and Content
  - Document as is
- Content cleaning and Requirements meeting
  - Obtain additional agency requirements
  - Map content to new structure
  - Analysis documentation
  - Implementing team and Digital Government team to review and complete planning documentation
- Solution Review / agency sign-off meeting
  - Overview of operational support
  - Review implementation documents

Review development website  
Discuss process for go live  
Agency sign-off on migration effort

### Content Migration

- Site content freeze
  - 1 week prior to migration effort
- Deploy Drupal
- Configure Drupal
- Dev go live tasks

### Validation / Sign-Off

- Testing
- Agency final review / approval
- Prod go live tasks

## Agency Content Cleaning Checklist

### Tips for preparing your current website for analysis and content migration

Your new website will be created directly from your current site's content. Therefore, a careful review of all elements is essential. Evaluate content for usefulness to the target audience:

What should be kept?  
What should be updated?  
What should be discarded?

**Remove** outdated or non-relevant information

**Repair** broken links, typos, and images

**Replace** old documents, forms, and images with updated versions

If your agency does not have direct access to your web content, please contact your content administrator for assistance.

### Page Content

Remove or replace all outdated content  
Verify calendar listings and confirm events are current

### Contacts

Review all staff, vendor, partner, and leadership lists  
Review agency phone numbers, emails, addresses, and available hours

### Links

Check links with a free link checker tool such as: <http://validator.w3.org/checklink>  
Repair all broken links  
Check that all links to third party sites lead to current and relevant content

### Documents and Forms

Ensure all documents are current and relevant  
Remove or replace outdated documents

### Images

Repair broken images  
Ensure images are good quality and current  
Optimize images for web

### Image Editing Tip:

If your agency doesn't have access to Photoshop, try an open-source alternative like GIMP image retouching and editing software:  
<http://www.gimp.org/>

## Agency Operational Support

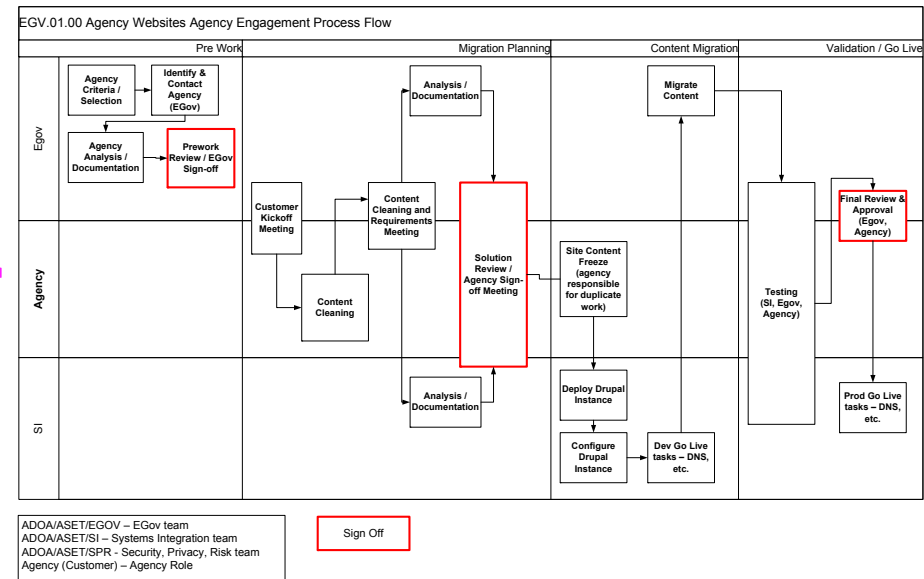
### The process for an Agency to receive support for the Agency Platform

#### Website User Requires Assistance:

- Contact agency webmaster
- Webmaster resolves issue (next process, if issue cannot be resolved)
- Notifies user that the issue is resolved

#### Agency Website Administrator Requires Assistance:

- Submit relevant details and contact information to ADOA-ASET Service Desk
- Service Desk assigns ticket to appropriate support group
- Support group completes the requested work
- Work with agency website admin to test/confirm resolution
- Support group closes ticket
  - Automatic notification upon ticket closure



#### ADOA-ASET Service Desk:

Support services are available 7am - 5pm Monday - Friday  
 ServiceDesk@azdoa.gov  
 60-364-4444

The  
Basics

Customization  
Options

Change  
Management

Business  
Processes

**Additional  
Resources**

Site  
Analytics

# Additional Resources

---

Free Resources

Premium Resources



## Free Resources:

### User Guide

The [User Guide](#) was created specifically for Agency Platform Website users and covers Drupal content management information from the basic concepts and editing to more advanced levels for managing views, blocks, and taxonomy.

### Video Tutorials

A variety of basic content management [tutorial videos](#) are available on the ADOA-ASET website to help you get started or refresh your skills.

### Community

#### *Drupal.org*

Drupal is built, used, and supported by an active and diverse community of people around the world. You can join the Drupal Community at [Drupal.org](https://www.drupal.org) and join Drupal groups in your area. Many groups meet regularly and offer a variety of community based support such as the Phoenix Metro Drupal Group's Drupal Camp.

#### *Hub.az.gov*

ADOA-ASET has established the [Agency Platform Working Group](#) on State of Arizona Collaborative Communities website, [Hub.az.gov](https://www.hub.az.gov). The purpose of the group is to provide a venue for collaboration, learning, and development of best practices around the State Agency Drupal and AESP platforms. Sign up to participate.

## Premium Resources:

Several third party vendors offer a variety of Drupal training from basic content management to theming and development. Below are a few suggestions to get you started.

### Acquia Training

Acquia offers both in-person and online Drupal training. Please contact them directly to discuss the many options that are available to suit your specific needs.

### lynda.com

lynda.com is a premium source of online training for a wide range of software including Drupal 7. You can start a free trial to see if it's right for you.

### NxtTeam

NxtTeam.com offers a wide variety of in person and virtual classroom Drupal 7 courses.

### OSTraining

OSTraining.com offers online, classroom, and onsite training.

The  
Basics

Customization  
Options

Change  
Management

Business  
Processes

Additional  
Resources

Site  
Analytics

# Site Analytics

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Overview

Analysis Tools

**Overview:**

Your new Drupal website comes with access to Google Analytics, a set of powerful analytic tools to help you dive into your data. To connect to your account, provide the email address you use to login to Google to the ADOA-ASET Service Desk. Your email will be applied to your website allowing you to login to Google Analytics to review your site's data.

**Analysis Tools:**

**Real-Time Reporting** - See how many people are on your site right now, where they came from, and what they're viewing.

**Custom Reports** - Build your own metrics dashboard in minutes. Instead of wading through data, you have instant access to the answers you need.

**Custom Variables** - Custom variables help you to understand your customer segments and learn how engaged they are with your site.

**Advanced Segmentation** - Apply predefined segments such as "Visits with Conversions" or "Organic Traffic", or create your own segments. Analyze individual segments or compare a number



of segments across all your reports.

**Dashboards** - Start with a dashboard that includes the most important performance indicators for your organization. Create an "SEO" dashboard for your search engine optimization.

**Visualization** - Google Analytics offers a variety of powerful visualization tools including Flow Visualization and In-Page Analytics.

**Sharing** - Data driven decision making works best when your teams can easily share information. Use the intelligence and alerts feature to discover unexpected changes and notify your colleagues.

Mark key events in your account history for others to see. Easily develop and share custom dashboards for the metrics important to your business.

**API and Customizations** - Applications, plugins, and customizable features are available to help you integrate Google Analytics into your organization's workflows. Take advantage of thirdparty solutions, or create your own apps using the Google Analytics API.



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