SHRM Hosted Sites
Website Administrator Guide

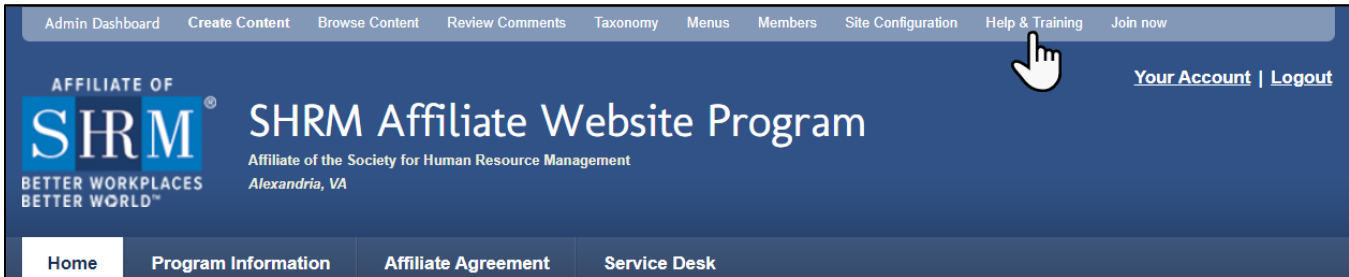# Contents

Introduction

This guide is for Administrators of SHRM hosted websites and is designed to provide you with a basic overview.

Please review the information found in the Training Center that is built-into your website which will provide you with more details and instruction.

Drupal is the name of the content management system that is driving your dynamic website. The purpose is to provide a system for you to be able to update and manage your website content via a web interface, rather than relying on coded, static pages that require a web developer to change.

The content management system stores your website content, images, documents & settings in a database, so your content can be easily edited by your chapter/council and delivered via the website.

As a website administrator you will be able to log in and manage your content and other elements of your website directly online, without needing any prior knowledge of HTML or the other languages that make up your website.

Common Terminology

Drupal uses common words to refer to things within your website's system. Below are a few most common and their definition:

Node

A common term within Drupal is 'node'. A node is a piece of content on your website, such as a page, an image, an event, etc. Each piece of content is stored individually within your database as a node. Each node has fields such as the title and body.
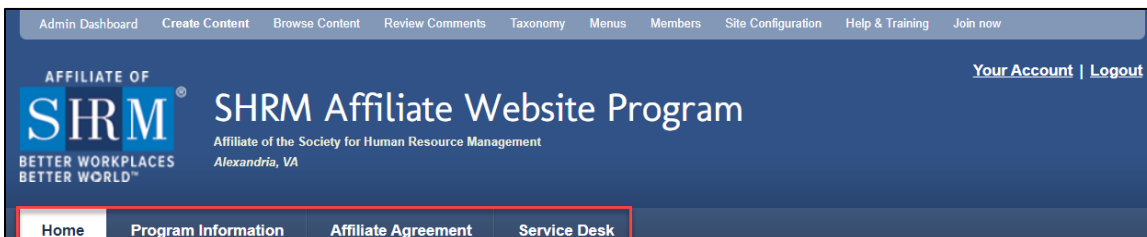
WYSIWYG

WYSIWYG is an acronym for What You See Is What You Get. The WYSIWYG editor in your Drupal website allows you to edit content on your page and apply web site styles (such as bolding, bulleted lists, tables, etc.) without needing to add HTML code.
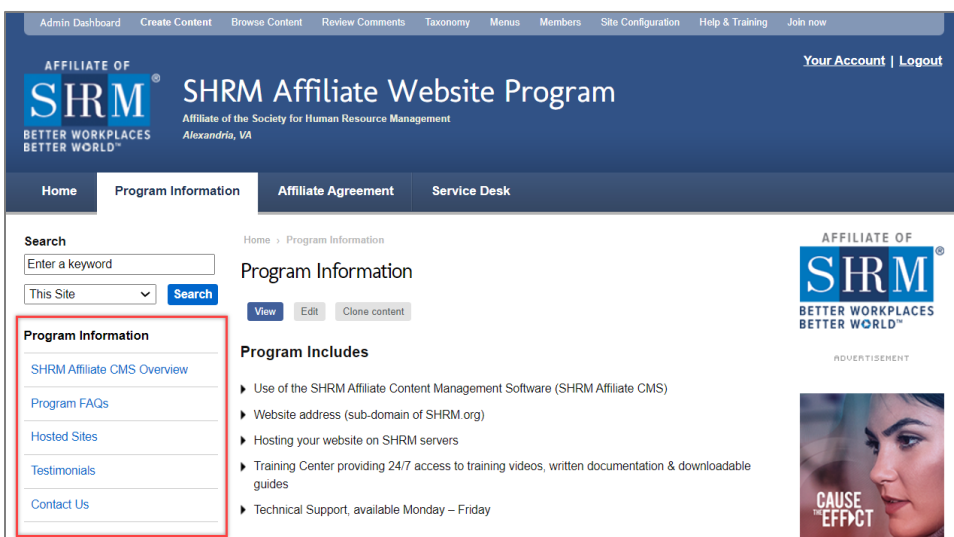

Main Menu

This is the horizontal menu bar located beneath the site title and logo:

Side Menu or Side Navigation

This is the vertical menu that appears on the left-hand side of the main content area on site sub-pages:

Special Menu Items

There are three menu items that will automatically appear as soon as you create your first piece of content. These content types are Meeting & Events, News and Blog. These content types are explained further in this guide as well as in your Training Center.

Logging In

Click the link Sign In located in the upper right-hand corner of the site and enter the username and password that you have been provided.

If you are a member of the chapter and have now been given the Administrative Role, it is recommended that you make sure to logout before attempting to login, and then the administrative tools will be available:
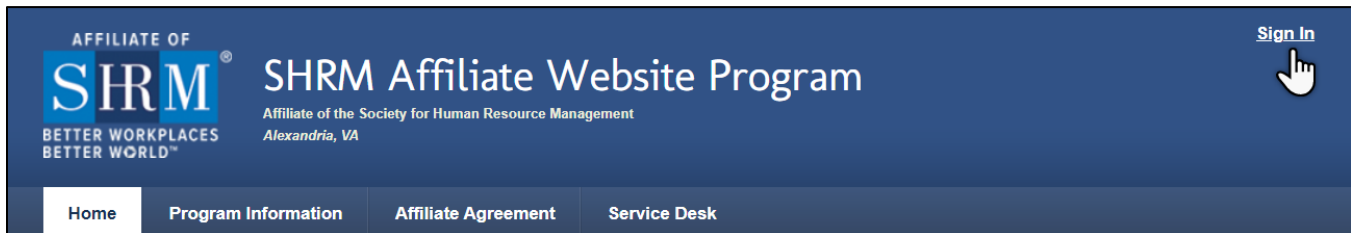
Should you have any issues logging in the first time as an administrator, please contact the individual within your chapter/council that gave you administrative rights.

Administrative Tools

Once you login as an administrator, you will see the Admin Links at the top of your site:
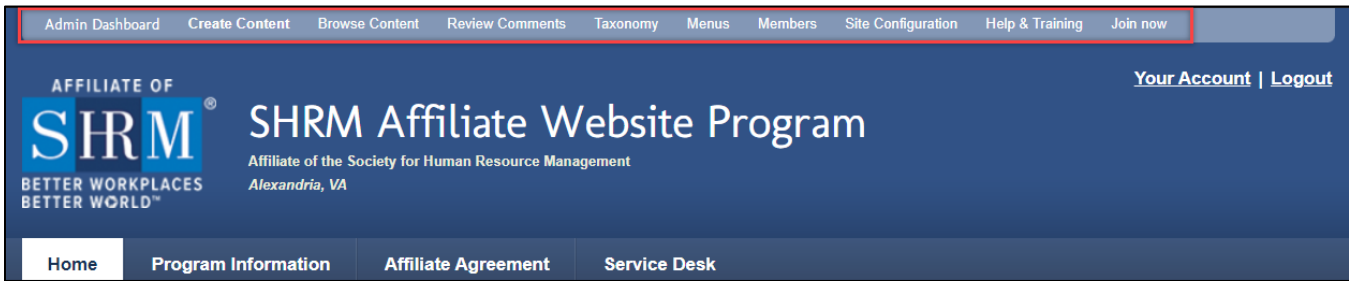
You will have access to the following using these Admin Links:

Admin Dashboard: This administrative dashboard provides you with all the tools needed to fully manage your site.

Create Content: When you need to create new content for your site, clicking this link will take you to the listing of all content types so you can make your selection:

- Blog
- Event
- Form
- News
- Page
- Survey

Browse Content: This link takes you to a list of all the content that has been created for your site. This includes not only Pages, but News items, Blog entries, Events, etc.

Review Comments: If your site is using the Blog feature, this link takes you to the comments that have been posted allowing you the ability to manage them.

Taxonomy: This link takes you to a page to manage the categories defined on your site for Blogs and Events.

Menus: This link takes you to the page that gives you the ability to arrange the main menu tabs.

Members: This link takes you to your Member Database.

Site Configuration: This takes you to a page where you can manage your Chapter Settings, Homepage Content, Share Icons and Site Styling.

Help & Training: This link leads you to the Help & Training Center which provides you with instruction to manage your website.

File Browser

Your website was not set-up to copy and paste images into the content. Instead, you have a File Browser that you will use and work with to store your image files.

Before adding an image into your content, you must first upload the image to the File Browser. When the image is uploaded to the File Browser, it is stored on a SHRM server.

Within the File Browser, you can create folders and store not only images, but documents as well such as Word, PDF, Excel and PowerPoint.

To access the File Browser, click the Admin Dashboard link found at the top of your site and the scroll down to the Browse Content sub-heading where you will find the link for the File Brower.

To learn more about the File Browser, please view the article title Working with the File Browser found in the Training Center under the section called Images & Videos.
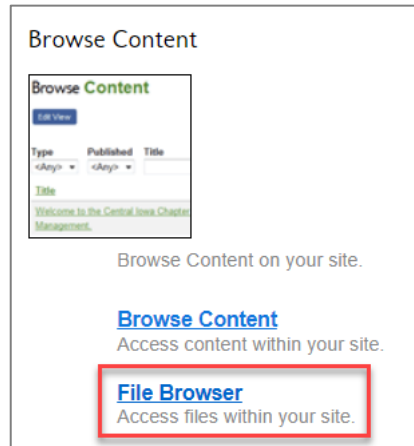
Site Configuration

Chapter Details

The information that is found in the footer of your website can be updated within Chapter Details and can include the following information:

Chapter Information

- Chapter or Council Name
- Site Slogan
- Email Address
- Chapter Number

Chapter Information

Chapter Name

SHRM Affiliate Website Program

Appears in the site header

Site slogan

Website resource for SHRM Affiliate Chapters and State Councils

Used for meta tag description. (255 character limit).

Email Address

hostedhelp@shrm.org

Used as the *FROM* address on member directory emails

Email Address for notifications

hostedhelp@shrm.org

Notifications about new user account are sent to this address.
You can enter more than one email address separated by a comma.

Chapter Number

Contact Information

- Street Address
- Street Address (Line 2)
- City
- State
- Zip Code
- Phone Number
- Fax Number

Contact Information

Street Address

1800 Duke Street

Street Address (Line 2)

City

Alexandria

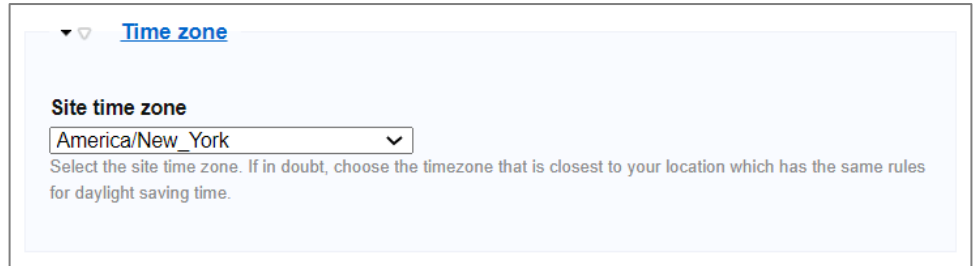**State Abbreviation**

VA

ZIP Code
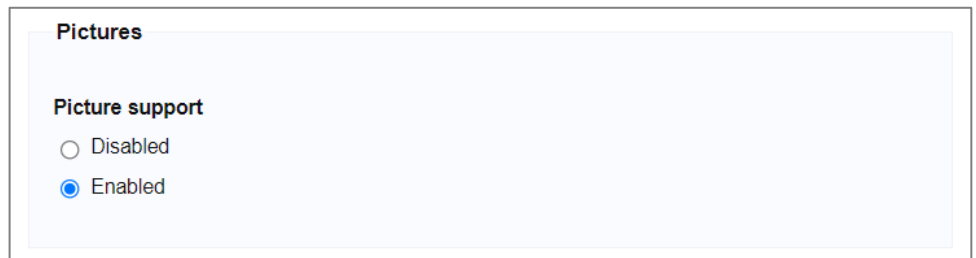
22314

Phone Number

Fax Number

Time Zone

Site Time Zone (drop-down menu). The time zone should reflect what zone your chapter or council is located in. It's important that this is the correct time zone because the date displayed for events and blog posts that you create will depend on the time zone you have chosen.

▾ ▽ **Time zone**

Site time zone

America/New_York ⌄

Select the site time zone. If in doubt, choose the timezone that is closest to your location which has the same rules for daylight saving time.

Pictures

Within the member database, you can choose to allow members to upload an image to their record. To control whether this is an option or not can be done here by choosing to enable or disable.
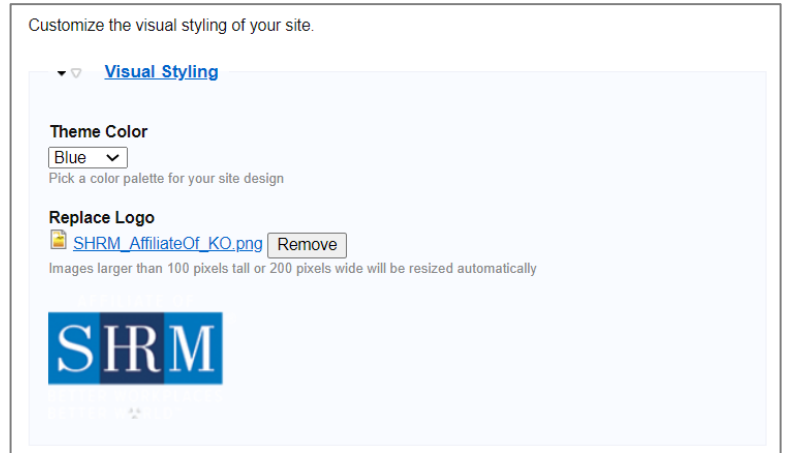
Pictures

Picture support

○ Disabled

◉ Enabled

To learn more about the above options, please view the articles and videos found in the Training Center under the section called Site Settings.

Site Styling

You can choose a color theme for your site as well as update the logo:

Theme Color

This is a drop-down option with the following color choices:

Replace logo

This includes a tool for you to browse your computer and upload a new logo image file. Your site logo should be no more than 200px wide and tall.

To learn more about the above options, please view the article or video titled Website Logo & Site Color Theme found in the Training Center under the section titled Site Settings.

Homepage Content
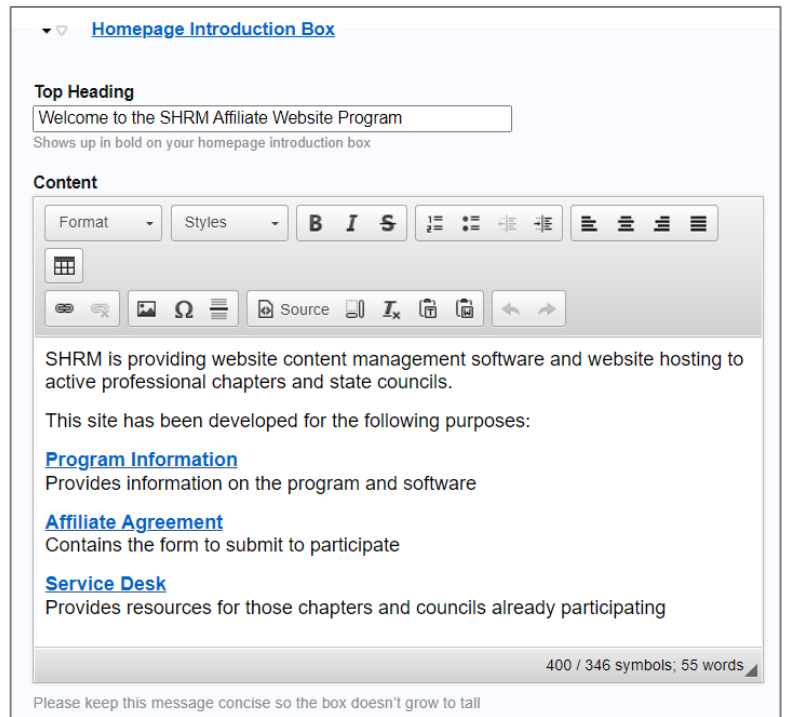
Customize the look and feel of your home page.

Homepage Introduction Box

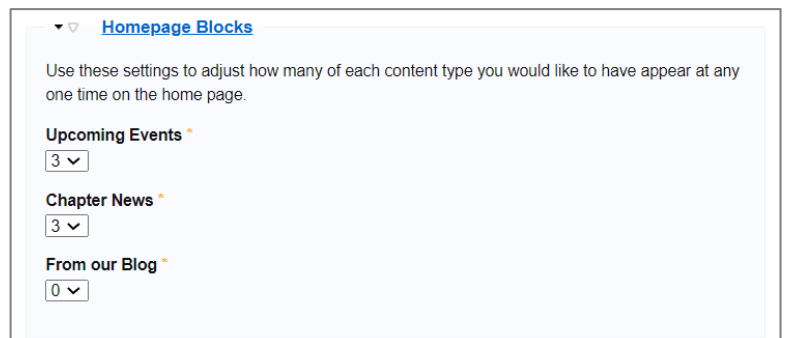**Top Heading:** This is the first heading that appears in the Intro box and will show up bold.

Content: This is the information listed below the Top Heading and can contain text, images and links. This should be used as a short introduction to your chapter or council and 1 to 3 paragraphs is ideal.

Homepage Blocks

Homepage blocks are the areas for certain content types that you can create. These content types will automatically feed into your website in two places: one in a designated page and secondly as pre-programmed block sections on the homepage.

Below are the homepage block content types and you can control the number that appears:

Social Media

If you have a Twitter, Facebook, LinkedIn or Instagram account you can enter the link to your group.

Social Media Access

If any of these are filled out, a **Social Media** bar will appear on your homepage

Twitter

http://www.twitter.com/SHRM

Enter a full URL — for example: https://twitter.com/shrm

Facebook

http://www.facebook.com/societyforhumanresourcemanagement

Enter a full URL — for example: https://www.facebook.com/shrmchapter

Linkedin

https://www.linkedin.com/company/shrm/

Enter a full URL — for example: https://www.linkedin.com/companies/shrm

Instagram

https://www.instagram.com/shrmofficial/

Enter a full URL — for example: https://www.instagram.com/companies/shrm

Awards

There is a designated area on the homepage to display SHRM chapter/council award images.

Awards

Chapter Awards

Guide to the Homepage

Introduction Box

Each SHRM hosted site homepage features an introductory heading message. This should be a paragraph or two to introduce your chapter/council. If too much content is added in this space, it will push the other important homepage content further down and this means it may be missed by users of the site.
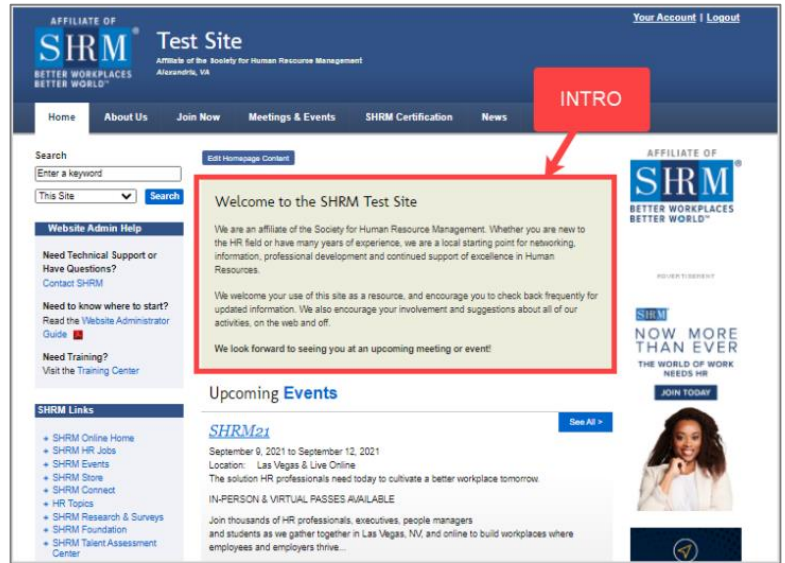
Homepage Blocks

The blocks on the homepage consist of **Upcoming Events**, **News** and **From Our Blog**.

Whenever you add a new event, news item, or blog entry to your website your homepage can automatically update with the title and teaser text to the content. This keeps your homepage content current and interesting to your members and site visitors.

Upcoming Events: You can set the display between 1 to 5 of your upcoming events and based on the
event date, they will automatically roll on and off.

Affiliate News: You can set the display between 1 to 5 of your news articles.

From our Blog: You can set the display between 1 to 5 of your blog entries.

Social Media Access

If you have a Twitter, Facebook, LinkedIn or Instagram account you can enter the link to your group. This will display on your homepage as a Social Media bar including the icon that users can click on to access.

Award Images

There is a designated space on the homepage to display awards received from SHRM.
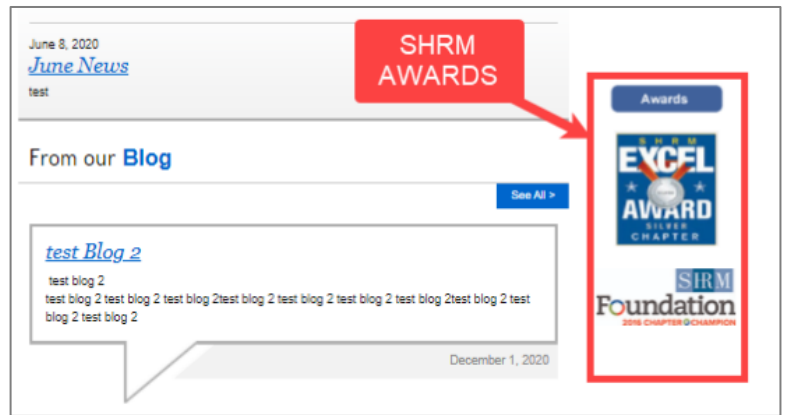
News from SHRM

This is a newsfeed that is controlled by SHRM.
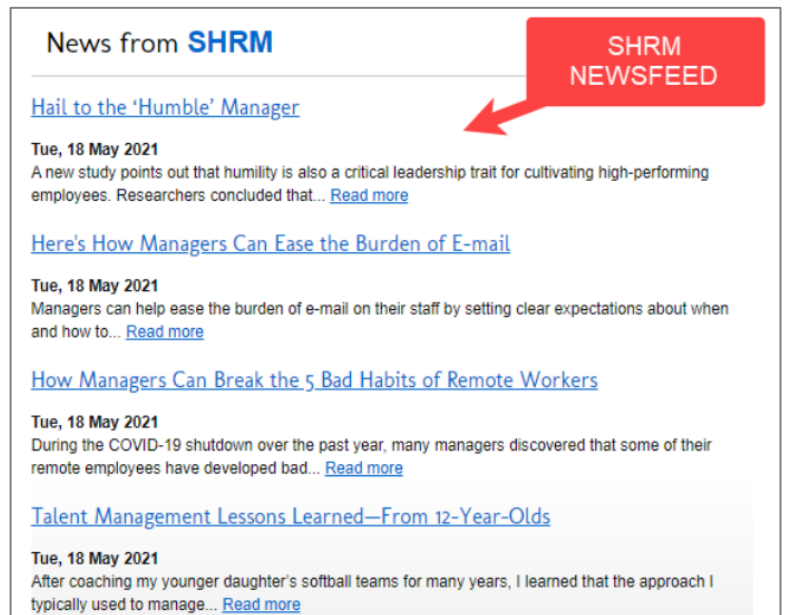
Additional Homepage Content Area

This space allows you to add additional content to your homepage.
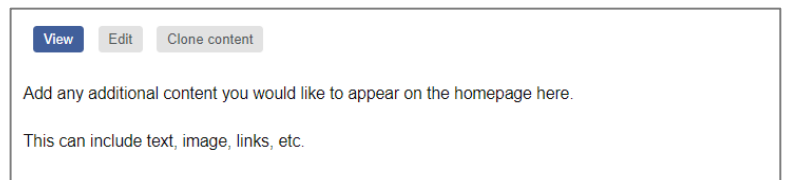
Footer

The footer of your website consists of the Contact Information, Main Tabs and SHRM Links.

Contact Information

This information is auto generated from what has been entered by the chapter/council.
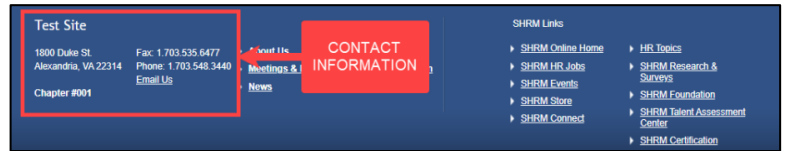
Main Tabs

This is an auto generated listing of the main tabs found at the top of your website.
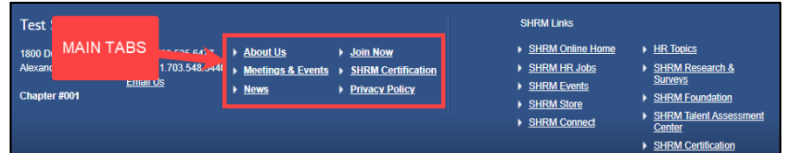
SHRM Links

These are links to SHRM.org and are controlled by SHRM.

Left Side Content

The content that displays in the left column of the website is controlled by SHRM and consists of the following:

Search

There is a search box which allows your website visitors to enter a keyword and then select to search your site (this is the default search option) or choose to search the SHRM.org site.
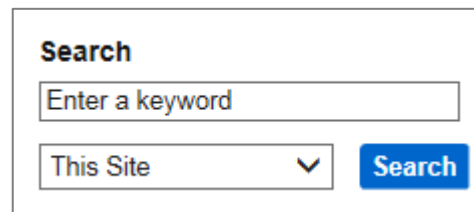
SHRM Links

SHRM Ads

Examples

Right Side Content

The content that displays in the right column of the website is controlled by SHRM and consists of the following:

Affiliate of Logo

SHRM Ads

Examples
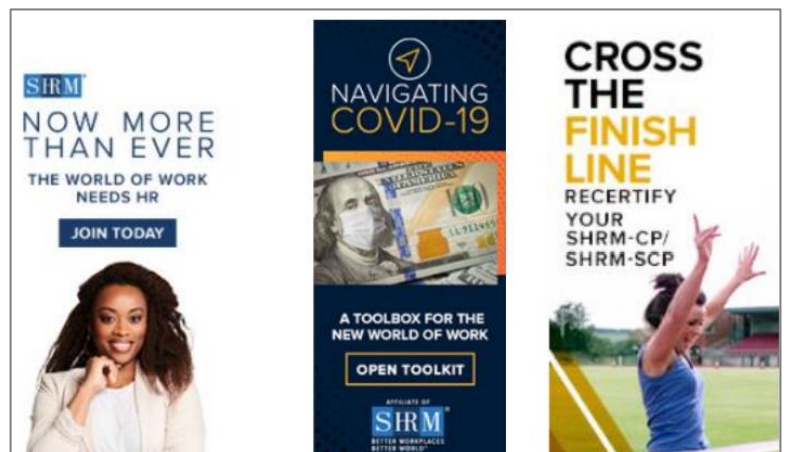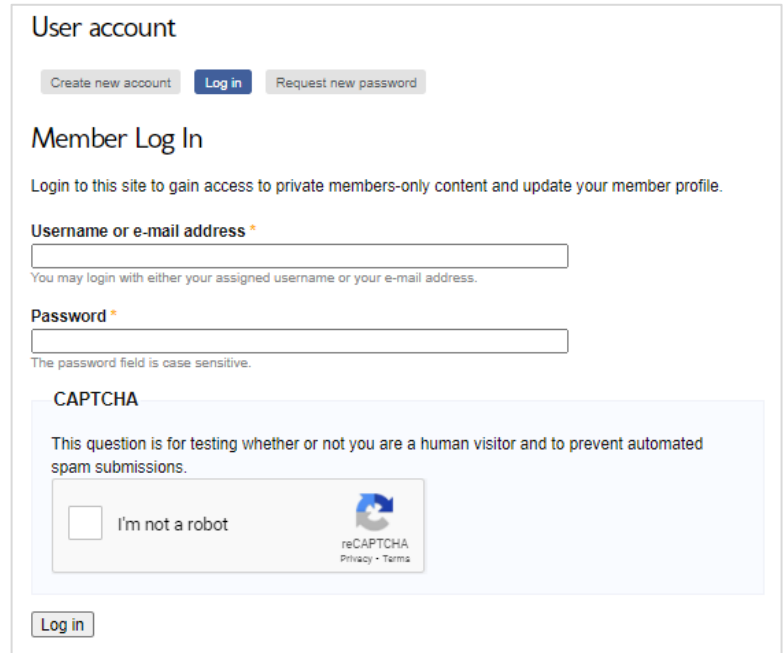
Sign-In and Join Now link

When a visitor to your website is not logged in, they will see the Sign In or Join Now links in the upper right-hand corner of your site:
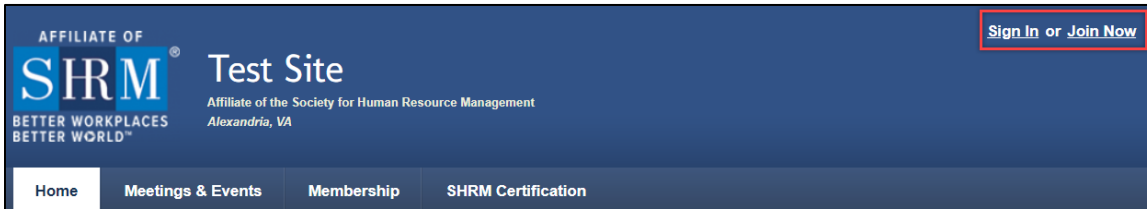
If they are a member, they can click on the Sign In link and enter their username and password to have access to manage their Member Record as well as any member protected content on the site.

If they are not a member and would like to Join, clicking on the Join Now link will direct them to the Join Now page if you are using the Join Now Feature.

You can update the content on the Join Now page by clicking the Join Now link found at the top of your site in the Admin Links:
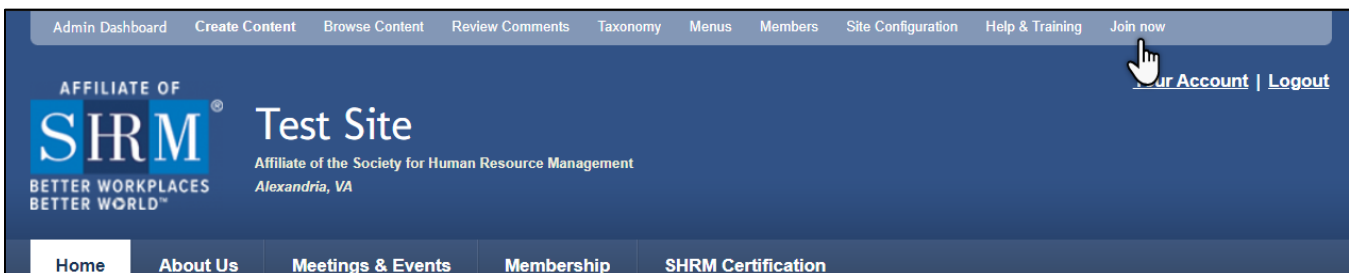
The Join Now Feature is an option that you can use on your website. If you would like this feature enabled/disabled, please submit a Support Request and the SHRM Affiliate Website Program Service desk can assist you.

You can learn more about the feature by reading the Join Now Feature Overview in the Training Center under the Managing Members section.

SHRM Exclusive Areas

All SHRM hosted sites have specific areas on the homepage that are exclusive to SHRM use:

SHRM Links: These are links to pages on the SHRM.org site and it appears in the left-hand column of the website as well as in the footer of your site.

SHRM Affiliate of Logo: This is the current logo. Should it ever change, SHRM will handle the replacement of this image and it appears in the right-hand column of the website.

SHRM House Ads: These are SHRM advertisements for SHRM conferences and products and appear in the left and right-hand column of the website

News from SHRM: This is an RSS Feed of the most recent HR News articles from SHRM

Creating Content / Content Types

There are 6 different content types that you can create. Below is a brief description of each and you can learn more about each content type in your Training Center:

- **Blog:** Posts for the Blog section.

- **Event:** Conferences, meetings, seminars, networking events, etc.

- **Form:** A web form for collecting information

- **News:** Chapter/Council news and press releases

- **Page:** Static content pages to be placed anywhere on the site

- **Survey:** Questionnaires, polls, and surveys

Blog

The software was designed so that when a blog entry is created it will appear on the main Blog page and under the section titled From Our Blog on the homepage.

To create a blog entry, click the Create Content link found under the Admin Links at the top of your site and then select the Blog Content Type.

To learn more, please view the articles in the Training Center under the section titled Blog.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

Upcoming Events

The software was designed so that when you create an event it will appear on the main Meetings & Events page and under the section titled Upcoming Events on the homepage. It is designed to display a listing of the next upcoming events and they will filter on and off based on the event dates.

To create a new event, click the Create Content link found under the Admin Links at the top of your site and then select the Event Content Type.

To learn more, please view the articles in the Training Center under the section titled Meetings & Events.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

Form

The software allows you to create a webform to collect information from users.

To create a new form, click the Create Content link found under the Admin Links at the top of your site and then select the Form Content Type.

To learn more, please view the articles in the Training Center under the section titled Forms.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

News

The software was designed so that when you create a news item it will appear on the main News page and under the section titled Affiliate News on the homepage. The news items will filter on and off depending on your settings.

To create a new event, click the Create Content link found under the Admin Links at the top of your site and then select the News Content Type.

To learn more, please view the articles in the Training Center under the section titled News.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

Page

The software allows you to create a static page that can display anywhere on the site.

To create a new page, click the Create Content link found under the Admin Links at the top of your site and then select the Page Content Type.

To learn more, please view the articles in the Training Center under the section titled Creating & Editing Web Pages.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

Survey

The software allows you to create a survey for polls, questionnaires, etc.

To create a new survey, click the Create Content link found under the Admin Links at the top of your site and then select the Survey Content Type.

To learn more, please view the articles in the Training Center under the section titled Surveys.

Add content

Blog
Posts for the *Blog* section, with commenting and future scheduling allowed.

Directory listing
A listing of files similar to how Apache lists files in a directory.

Event
Conferences, meetings and other chapter-only events.

Form
A web form for collecting information.

News
Chapter news and press releases.

Page
Static content pages to be placed anywhere on the site.

Survey
Questionnaires, polls, and surveys with publicly-available results.

Membership Database

The software comes with a membership database. To access the database, click on the Members link found at the top of your site in the Admin Links:

| Admin Dashboard | Create Content | Browse Content | Review Comments | Taxonomy | Menus | Members | Site Configuration | Help & Training | Join now |

AFFILIATE OF

SHRM
BETTER WORKPLACES
BETTER WORLD™

Test Site
Affiliate of the Society for Human Resource Management
Alexandria, VA

Your Account | Logout

| Home | About Us | Meetings & Events | Membership | SHRM Certification |
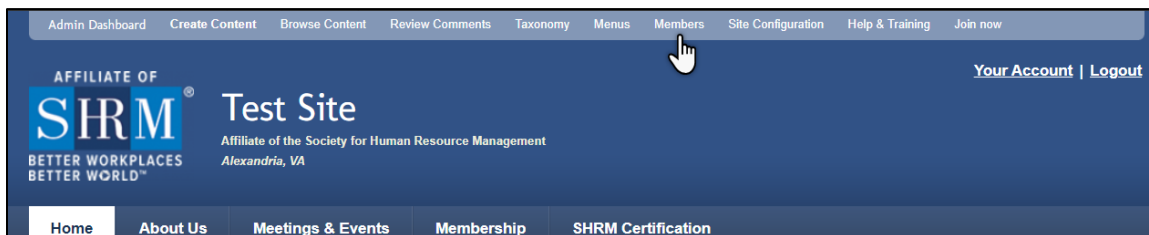
To learn more about the database and how to manage the information, please visit the Training Center and read the articles found under the section titled Managing Members.

Member Categories

Your web site allows you to categorize your members into groups within the member database, and then perform different actions on these groups.

You may want to create categories to further identify your members, such as Students, Volunteers etc.
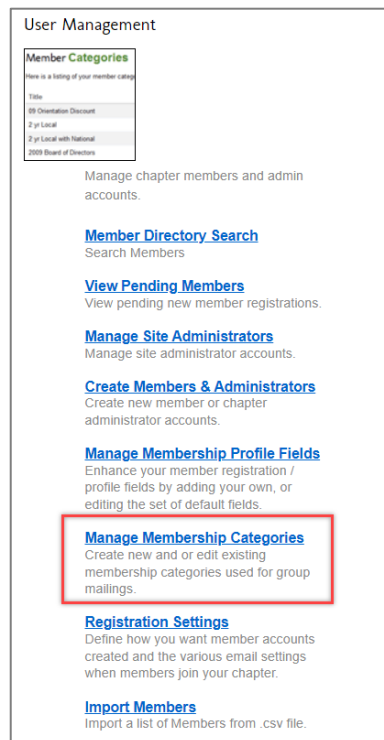
After creating categories, you can then assign your members to one or more category as appropriate.

Once you have categories created and members assigned to them, you can use this as a search feature within the Member Database and preform different actions such as:

- Send a mass email
- Download and export an Excel file

Only administrators can assign a member to a category. Members do not have the capability to choose or join a category. Members can be assigned to multiple categories.

To manage and create Member Categories, click the Admin Dashboard link found under the Admin Links at the top of your site and then select Manage Membership Categories found under the sub-heading of User Management:

To learn more, please view the article called Member Categories found in the Training Center under the section titled Managing Members > Membership Database.

Sending Mass Emails

You can use the website mass email function to send an email to all members or just to certain members of your choice.

To learn more, please view the articles found in the Training Center under the sub-heading of Managing Members > Mass Email Feature.

Website Statistics

We use Google Analytics for our hosted affiliates and this information is added when your website is initially created. With Google Analytics you can see the following types of statistical information for your website:

- Site Visits
- Page Views
- Average Time on Site
- Traffic Sources

For your site to access their Google Analytics information, a chapter or council would have to first set-up a Google account and provide SHRM with the email address used. SHRM then sets up access to the information through that email address.

It is recommended that you use an email address that will stay with your chapter and not a personal email address. This will make the account access within your chapter or council easy to transfer since you will be creating the login information.

If you are unsure if you have login access or would like to get access, please submit the Google Analytics Login Access form after you have set-up a Google account.

SHRM Support

We have created a SHRM Hosted Website Service Desk that provides you with many resources. You can find a link to the Service Desk within your Training Center under the sub-heading of Resources or click here to be directed to the page.

The SHRM Affiliate Website Program Service Desk can assist you when you have questions, need technical support or additional guidance, but it is required that you submit a support request.

You can find a link to the support requests in your Training Center under the sub-heading of Resources.

You can also find a link to the support request forms within the Service Desk site, so you do not have to be logged in to your website to access and submit a request for assistance. It is recommended that you book mark the Service Desk website for easy access.

Please read the SHRM Training and Support Guidelines found in your Training Center under the sub-heading of Resources (and listed in the next section), to become familiar with the support provided by SHRM.

SHRM Hosted Website Service Desk

Service Desk

Service Request Forms

SHRM Training and Support Guidelines

News

Resources

Presentations

Training Guides

Training Videos

Program Feedback

Hours of Operation

Monday - Friday, 8:00 AM to 5:00 PM (ET), except when SHRM is closed due to holidays, administrative closings or inclement weather.

We respond as quickly as possible to all requests but do ask you to allow at least 1-2 business days to receive a response.

If you have a spam blocker be sure it is set up to accept messages from the "@shrm.org" domain or you will not be able to see our message, thus delaying your access to the assistance you need.

Quick Links

Service Request Forms

Training and Support Guidelines

News

Resources

Program Feedback

SHRM Training and Support Guidelines

This document is an Exhibit to the Affiliate Agreement entered into between SHRM and the chapter/council ("Affiliate") which is a party to that Affiliate Agreement, and serves as a guideline for the training service and support that SHRM will provide to the affiliate while participating in the SHRM Hosted Web Site Program

Description of Services by SHRM under the Affiliate Agreement

SHRM will host Affiliate's web site on SHRM Web Hosting and Virtual Hosting servers.

- Create Affiliate Web site: SHRM will develop a web site for affiliate using a Content Management Software (CMS).
- Web site Hosting: SHRM will host affiliate web site itself or through a third-party hosting service.
- Training: SHRM will provide training materials in the form of written documents and/or videos.
- Ensure application/web server is properly maintained
- Ensure web site is available 24/7
- Application/web server security
- Support: SHRM shall provide Help Desk Services for the CMS as outlined under Help Desk Services.

Availability of Web Hosting Services

SHRM shall attempt to provide Web Hosting and Virtual Hosting for twenty-four (24) hours a day seven (7) days a week throughout the term of this Agreement. The Web Hosting service may be inaccessible or inoperable for any reason, including, without limitation: (i) equipment malfunctions; (ii) periodic maintenance procedures or repairs which SHRM may undertake from time to time; or (iii) causes beyond the control of SHRM or which are not reasonably foreseeable by SHRM, including, without limitation, interruption or failure of telecommunication or digital transmission links, hostile network attacks, network congestion or other failures. SHRM has no control of availability of Web Hosting and Virtual Hosting on a continuous our uninterrupted basis.

Help Desk Services

The following services are provided:

- Resolve issues relating to website outage
- Resolve issues relating to CMS operation malfunction

The following services are not provided:

- In-person and/or phone training
- Maintenance of web site content

Methods for Requesting Assistance

- Service Desk
- Support Request Forms

Hours of Operation

Assistance will normally be available from 8:30 AM to 5:00 PM (EST), Monday through Friday, except when SHRM is closed due to holidays, administrative closings or inclement weather.

Responsibilities of Those Requesting Assistance

Before contacting the Service Desk, users should explore help that is readily available through the training materials provided and/or other administrators using the software for your chapter/council.

When such help has been exhausted and assistance is needed, then the users should submit a Support Request Form which will generate a support ticket.

When contacting the Service Desk the following information must be provided:

1. Complete Contact Information (First & Last Name, Chapter or Council Name, Email and Phone Number)
2. A clear and specific description of the problem or request, including information regarding any error messages you may have received
3. Priority Level for Request-High/Medium/Low (As outlined in the chart below)

Priority Levels for Requests

Priority	Definition
High	A problem that affects the entire web site, i.e. web site is down.
Medium	A general service request or problem with a workaround solution. These types of requests are for issues that occur because the Software is not working as designed.
Low	A service request that does not require immediate attention or involves long range planning or an inquiry about the software or requests for information.

Affiliate Obligations to SHRM

Affiliate must have provided accurate, current and complete information when requesting the creation of a new web site and must notify SHRM within five (5) business days when any of the information Affiliate provided as part of the web site creation has changed. Affiliate must respond within five (5) business days to any inquiries made by SHRM to determine the validity of information provided by Affiliate.

Web Site Content

Affiliate is solely responsible for providing, updating, uploading and maintaining Affiliate's website and any and all files, pages, data, works, information and/or materials on, within, displayed, linked or transmitted to, from or through Affiliate's website, including images, photographs, illustrations, graphics, audio clips, video clips and text.

Storage and Security

Affiliate is entirely responsible for maintaining the confidentiality of its password and account information.

Support Request Forms

The SHRM Affiliate Website Program Service Desk can assist you when you have questions, need technical support or additional guidance, but it is required that you submit a support request.

You can find a link to the support requests in your Training Center under the sub-heading of Resources.

You can also find a link to the support request forms within the Service Desk site, so you do not have to be logged in to your website to access and submit a request for assistance. It is recommended that you book mark the Service Desk website for easy access.

Website Technical Support Form: If you are having trouble with the software, something is not working properly, you need assistance in setting up functions and features

Login Issue Form: If an administrator or chapter member is having login issues. This form should only be submitted by an administrator and not your members.

Request for Training: Use this form if you would like to request training

Website/Program Questions Form: If you have questions about the software, software capabilities, best practices

Mobile Version of Website Form: If you have are having trouble with the mobile version of your site and/or have questions

Google Analytics Login Access Form: If you would like to have login access to the statistics for your website

Agreement Termination Request Form: If your chapter/council has decided you no longer wish to participate in the SHRM Affiliate Website Program, submit this form to terminate the agreement

SHRM Affiliate Program Announcements

Emails

We send emails to all administrators to help introduce and educate you on features of the SHRM Content Management System (CMS). We do not maintain a mailing list of administrators and instead rely on the email address you list on file within your record of the chapter or council website. Please make sure that this information is accurate so that you receive these important emails from SHRM.

News Articles

In addition, we post [News](#) announcements within our [Service Desk](#) site regarding Software Upgrades, Program Enhancements and other important news items. Please visit often to make sure you are kept updated on all happenings with the program.