Drupal at IAS

INTRODUCTION TO DRUPAL AT IAS

Purpose of this session

- Give new and current users an overview of why we are using Drupal.
- Share tips and build community.
- Give an overview of key concepts in Drupal.
- Identify resources for content editors.
- Determine how IAS can help the new and current content editors.
- Suggestions for redesign of the current web sites are beyond the scope of this session.

What is Drupal and why do we use it?

- Content Management System (CMS)
  - Separation of design development from maintaining content
  - Separation of roles
  - Easier for non-technical people to use
  - Consistency across the site
  - Modular and expandable
- IAS Specific
  - Many sites are hosted off campus.

Where do I start if I am new?

- Drupal 7 documentation: https://www.drupal.org/documentation/7
  - Understanding Drupal
  - Nodes, content types and fields
  - Organizing content with taxonomies
  - Working with menus
- IAS Content Editor's Guide: https://www.ias.edu/docs
- https://www.itg.ias.edu/drupal-resources

Tip: Think about your audience

- Mobile First Strategy
  - Do not be bound by the idea that your page will look the same to all users on all devices.
  - Use responsive design mode on your web browser.
- What is responsive web design?
- How do you break responsive page design?
  - Static tables for layout
  - Using specific sizes instead of percentages

Tip: Use the staging server for testing

- www-stage.ias.edu
- www-stage.hs.ias.edu
- www-stage.sss.ias.edu
- www-stage.math.ias.edu
- Staging sites are usually wiped clean once a week

User roles and permissions

- What are roles and permissions in Drupal?
- How are they used?
- Default roles – Anonymous, Authenticated and Administrator
- IAS roles
- How to find out what roles you have?

Drupal content: node

- ▶ What is a node?
- ▶ Why is this important to know?

Content Types

- What is a content type?
- What are IAS content types?
  - Resource: IAS Editor's Guide: https://www.ias.edu/docs

Organization: Taxonomy

- Taxonomy is used for organizing your content into categories.

- *Vocabulary* is a container that holds different categories. For example, the vocabulary "Scholar Type" contains categories like "Director", "Faculty", and "Member".

- The categories themselves are referred to as *Terms*.

Displaying information

- Modules included in the setup of IAS Drupal allows us to display information in many ways.
- Views
- Sections
- Stacked Pages

Text Editing

- The WYSIWYG (what you see is what you get) text editor allows you to format the text.

- You will find buttons for common things such as making text bold, italicized, adding an image, hyperlink, lists and setting the text's style.

- Whenever you paste items into a text field be careful not to paste styles from external sources.

- Click the "Remove Format" button Tx (next to "Paste from Word"). This will remove most of the formatting.

Text Editing

▶ To add a heading, select the line of text that you wish to make a heading in the content window, and then choose a style from the "Paragraph Format" drop down.

▶ **Note**: that by default all regular text will be set as a "Normal".

▶ WYSIWYG tip: Use Shift+Enter to create a paragraph break without a large gap between lines.

Working with Images

- Guidelines for Images
  - Resolution is 72 dpi
  - File type is JPG for images
  - File type is PNG for icons, logos, and transparencies

- Further Information for image guidelines is located in the Image Production Guide

Working with Images

▶ To embed an image in the WYSIWYG, use the **Media Browser** button.

▶ In the Media browser, use either Upload, Web, Library, or My Files tab.

▶ Alt Text , Title Text , Image Credit , and Image Caption are optional.

▶ Use the Link Image to hyperlink the image to another web page.

▶ Note: in order to edit media options later on, select the media in the WYSIWYG editor then click the "**Add Media**" button.

▶ Tip: Using alternate text improves accessibility and optimizes it for search engines.

What are links

- Three different types of links:
  - Email Links - links that go directly to someone's email address.
  - Absolute link - contains all the information necessary to locate a resource and uses the following format: protocol://domain/path (e.g. http://ias.edu/scholars)
  - Relative link - locates a resource and typically consists only of the path (and optionally a resource) , but no protocol or domain (e.g. /scholars).

- The Link Button vs "Linkit" Button

Aliases and Redirects

▶ **Aliases** - Drupal uses "nodes" to identify pages by their position in your database. "URL Alias" allows you to provide a more understandable name to the page.

   ▶ Automatically generate URL aliases for new content.

▶ **Redirect** - A URL redirect is a URL that is set to direct visitors to a certain page

URLs

- Some things to **note**
  - URLs should not have spaces in them, so where we intend a space to exist a dash"-" is generally used.
  - As convention, the URL paths are typically all lower case.

Menus

- Menus are a collection of links (menu items) used to navigate a website
- You can add and edit the menu links
- Only create a menu link in one location otherwise there will be duplicate menu links.
- When creating a menu link use the relative path URL for internal links
- Choose the parent item if applicable
- You can change the order of the menu items by simply dragging and dropping

Webform

- A Webform can be used to create a questionnaire (survey), registration for an event, contact form.

- You can add any number of fields to the form.

- You can send confirmations and notifications to the form submitter.

- You can limit the number of submissions for the form

- You can control when a form is open or closed to accept submissions

- See all the submissions submitted in table format, analysis view or export to excel

Training Options

- ITG Website – https://www.itg.ias.edu/drupal-resources

- IAS Drupal 7 Sites Documentation - www.ias.edu/docs/

- LinkedIn Learning

- Drupal.org

Where do we go from here?

- cms-users@ias.edu will be the mailing list for content editors
- Open discussion