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?
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
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
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.
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.
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
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
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.
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