Websites built using Drupal in the BSOS College: A User Guide

The BSOS Website Collection................................................................. 1
Your Role in Maintaining the Website.................................................. 1
Logging In.............................................................................................. 2
Logged-in Navigation Menu.................................................................... 2
   Common Logged-in Navigation Menu Items....................................... 2
Your Account and Profile ...................................................................... 3
   Account = Boring! ............................................................................. 3
   Profile = Tell Us about Yourself!........................................................ 3
Editing Your Profile ............................................................................ 3
   Profile Editing Notes ........................................................................ 3
   My Profile is Missing!......................................................................... 3
What is Content? .................................................................................. 4
Creating Content.................................................................................. 4
   Content Creation Notes (also see Profile Editing Notes)..................... 4
Editing Content ................................................................................... 5
   Workflow........................................................................................... 5
   Workflow States................................................................................ 5
Appendix A. Using the Filtered HTML Text Editor................................. 6
   Adding Images - in the Filtered HTML Text Editor.............................. 6
      Add an Image using Image (Recommended for image uploads)......... 6
      Upload an Image using Media .......................................................... 7
   Adding Non-Image Files (Documents, PDFs, etc)................................. 7
Websites built using Drupal in the BSOS College - A User Guide

The BSOS Website Collection

The BSOS College has an assortment of websites using the Drupal framework and Drupal content management system (CMS). These websites are dynamic, eye-catching, and easy-to-use for those who are browsing the web as well as for those who are updating website content.

BSOS Drupal websites are built using templates that

- Help end users with
  - site identification
  - navigation
- Allow editors to concentrate on the message to be shared
- Optimize web pages for search engines
- Automatically link related information within the website (profiles to projects, publications, other profiles, etc.)
- Adhere to UM standards and Federal requirements

Unit home pages contain designated areas for department content, such as news, events, featured stories, social media and other contacts. Menu landing pages contain groupings of content and links to quickly get users to information. Content pages can contain text, graphics, links, calendars, lists, and other advanced web content.

Your Role in Maintaining the Website

Each Faculty, Staff, and Grad Student can

- Log in to the site
- Edit their own profile
- Create content
  - Publication profile
  - Project profile
- Propose content
  - News
  - Events
  - Featured stories
- Update information as it changes

What does this mean that you should do?

- Update your user profile, ensuring to keep your contact and bio information current
- Add past accomplishments and ongoing undertakings via project and publication profiles
- Submit news, events, and featured content stories for consideration.

Some departmental members will have the ability to update focus areas of the website. These super-users may be able to update landing pages, web content pages, news items, events, featured content items, links, and more.

Keep information on your unit’s website updated, so that the content continues to be fresh and engaging. The Drupal website platform supports this goal by providing a secure way for departmental members to update the website.
Logging In

To update information on the website, **you will need to log in**. There is a Login link on the darker red Footer area of the page template. Click the Login link and the My Account page appears.

- In the area labeled “**Username**”, enter your UM campus Directory ID. This ID is a login name used on the UM campus that generally is made up of some parts of your name. For example, “pshackel”, “mngates”, “cwerner” are UM directory IDs.

- In the area labeled “**Password**”, please enter the UM password related to your UM Directory ID. [sent securely and not stored]

- Click the “**Log in**” button to log in.

The system may delay a few seconds while looking up your login. If so, please be patient.

Logged-in Navigation Menu

Upon a successful login, the page will refresh to display information about your account and a menu of actions.

**Note the menu at the right** that contains items such as “My account”, “Create Content”, and “Log out”. This is your Logged-in Navigation Menu. Use this menu to help you add website content or edit existing content. Depending on your role(s) within the department, you may have more options available than those shown.

The **Logged-in Navigation Menu is only visible when you are logged-in to the system**, and it may push nearby page content aside. Because of its “push”, some pages may look oddly formatted when you are logged in.

**Common Logged-in Navigation Menu Items**

- **Create content** List those website items that you can create. (Some items will publish immediately, and others will go through an approval process.)
- **Edit content** List the website content that you can edit
- **My account** Edit your account details, such as your profile
- **Log out** Log out of the system
Your Account and Profile

The interesting information related to you is connected to your profile and other web content that you create, such as Projects and Publications. Your account information does not include any user-editable information.

Account = **Boring!**

Your website “account” consists only of your

- login ID
- time zone
- website roles assigned to you

Choose the “My Account” option in the Logged-in Navigation Menu to see your sparse account summary and a link to your Profile.

Profile = **Tell Us about Yourself!**

Your profile contains your contact information and other information that you can use to describe yourself.

There are two types of profiles available on the new website: Faculty/Staff profiles and Graduate Student profiles. You will have access to one of these profiles, depending on your department role. Super-users with the ability to modify others’ profiles will have access to both profile types.

- In the logged-in Navigation Menu, select “My Faculty/Staff Profile” or “My Graduate Student Profile”.
- Input your profile information on this page
- Profile information is displayed in a polished way along with your other data, such as your Projects and your Publications.

Editing Your Profile

To edit your user profile, click the “My Faculty/Staff Profile” or “My Graduate Student Profile” in the Logged-in Navigation Menu.

**Only two (2) required fields are required for your Profile:** First Name and Last Name.
Fill in other information as available and appropriate. **Don’t forget to Save!**

Profile Editing Notes

- **Add Alt tags for images.** Alternate text gives a general idea of what is shown in the image and is required for compliance with Federal Law, Section 508 (Americans with Disabilities Act). A short idea such as “bird on flagpole” or “Smith headshot” or “people smiling” or a person’s name will suffice.
- Any time **multiple values** can be added, a directional arrow appears. To rearrange the values, click the directional arrow and drag the item to another position.
- Many profile items use **collapsible boxes** when editing. When a down-arrow is beside the item title, that area can be collapsed. When collapsed, click the title to re-expand.

My Profile is Missing!

Is a profile missing from the profile listing? To appear in the summary listing of profiles:

- **Select the Category** under which your profile should appear
  - Faculty/Staff Category for Faculty/Staff profiles
  - Department Status category for Graduate Student profiles
- If this **category is set to “<none>”**, then the profile exists but it **does not appear** in the profile summary listings
What is Content?

“Content” refers to the data input into the website - minus the structure, design, user, and user profile information. The types of content on BSOS unit websites include:

- Publication Profiles
- Project Profiles
- News Items
- Events
- Pages
- Course Profiles
- Course Instances
- Featured Content items
- Landing Topics
- Webforms

While your Profile looks and acts like Content, it is directly linked to your User Account and is not considered Content by the Drupal system. That is why Profiles are not listed along with Content.

Creating Content

Add content using the “Create Content” link from the Logged-in Navigation Menu. This link leads to a page that shows the types of website content that you can create. Depending on your role(s) within the department, you may be able to create many types of website content.

For example, Faculty, Staff, and Graduate Students have the ability to create a Publication profile. The created Publication will be linked to that user’s Profile and also will be displayed on the Publications listings.

Note: Some content is immediately available on the website, while other content goes through an approval process.

Content Creation Process

1. From the Logged-in Navigation Menu, select “Create Content”
2. Review the list of the types of content that you can create is presented
   - The Create Content page lists each type of content that you can create, along with a short description
   - In the gold Logged-in Navigation Menu, the Create Content option expands
3. Select the type of content to create by clicking on its title link
4. Fill in fields as appropriate. Fields with a red asterisk (*) are required fields.
5. Save the content to the system using the Save button at the bottom of the page.
   - It may take up to an hour to publish, or may go through an approval process.

Content Creation Notes (also see Profile Editing Notes)

- Add Alt tags for images. Alternate text gives a very general idea of what is shown in the image. It is required for compliance with Federal Law, Section 508 (Americans with Disabilities Act).

- Edit Summary is an option for fields with a WYSIWYG (what you see is what you get) editor. The Summary field can be displayed instead of the complete “body” field if settings are in place. In the Summary field, use HTML to mark up text, or copy from the WYSIWYG’s Disable Rich Text setting.

  Note: BSOS Websites use the Summary field *only* with Featured Content on the home page rotator. The complete Featured Content item’s body are visible when the Featured Content item is viewed on its own page.

- Check if the item is part of a Workflow. If a box labeled “Workflow comment” is just above the Save button, the item must follow a workflow. It is in Draft mode until you change the workflow to “Editor Review”. If the item is ready for review, click the Workflow tab and move the Workflow status to “Editor Review”. [See the Workflow section on page 5.]
Editing Content

To see a list of content that you can edit, select the “Edit Content” option from the Logged-in Navigation Menu. (Don’t forget that you have to be logged in to edit)

Press Apply to show content available given the selected filters.

- **Title** is a link to view the item
- **Updated Date** shows the latest date the item was last edited/updated
- **Type** indicates the item’s content type (see What is Content? for a list)
- **Published** indicates the status of the item
  - Published items are visible/active on the website
  - Unpublished items do not show on the website
- **Related Area** indicates the Category of the item, if applicable
- **Edit** is the link to edit the item

Items that you can edit will have an edit link in the Edit column. If that link is not visible, your assigned roles do not permit you to edit the given item.

Workflow

Some content follows a Workflow, meaning that it follows an approval process before displaying on the website. Workflows generally have 4 possible workflow states: Draft, Editor Review, Approved/Published, or Archived.

**Workflow States**

- **Draft**: The author is editing the item; it is not yet ready for publication or review.
- **Editor Review**: The item has been submitted for review and publication. It may be Approved or returned to Draft state.
- **Approved/Published**: The item has been approved for publication and is now live on the website.
- **Archived**: The item is no longer active, but may be visible in archive lists or calendars.

On BSOS web sites, these types of content follow a workflow approval process: News, Events, Featured Content. Other types may follow workflows, dependent on unit needs.

Check if the item you are creating or editing has a Workflow. If it is in “Draft” mode, you will need to move it to “Editor Review” mode so that it can be considered for publication. You can enter an optional comment along with the submission.

Be sure to click the Save button to save your work and change the workflow state. An item saved to the “Editor Review” status will prompt the system to send an email to all users with the “News and Events Editor” role, to alert them of the reviewable item.

Quick Tip

If an **Edit tab** is available when viewing a piece of content, click the Edit tab to go directly to the Edit screen.
Appendix A. Using the Filtered HTML Text Editor

When editing site content and profiles:

- Users can easily create web-formatted content without learning Web coding.
- Information entered in plain text and image upload fields is automatically formatted.

An example of the input area for a WYSIWYG field that can contain configurable web text and graphics:

Adding Text
Edit within the gray box as with a text editor (like Word). Use available options to set up how field content might appear on a web page.

Please note that most manually-entered formatting is stripped out for page consistency.

Adding Images - in the Filtered HTML Text Editor

Inline images that are can be added into the WYSIWYG text editor. Extensions include .jpg, .gif, and .png. Choose from either of 2 options for adding an image into a WYSIWYG field: the Media option or the Image option.

Add an Image using Image (Preferred: Best for image uploads and web image links)
1. Click the “Image” formatting option.
2. You can reuse an image already on the website or upload an image that you own. Inserting from a URL on another server is discouraged for security reasons.
   - Re-using an image from the website:
     1. Click the "Browse Server" button for the File Browser window.
     2. Select the desired file and double-click to "Insert file"
   - Uploading an image:
     1. Click the "Browse Server" button for the File Browser window.
     2. Click the "Upload" option
        1. From the File window that appears, click the “Browse” (or “Choose”) button
        2. Locate the desired image and double-click to “Open”
        3. Choose the "Upload" option. (Then, close that window if necessary)
     3. Click “Insert file”.
3. Enter an Alternative Text description (required for Americans with Disabilities Act).
4. Set options such as image Width and Height, horizontal margins with HSpace, and text wrapping with Alignment.
5. Click OK to insert the image in place.
Upload an Image using Media

1. Click the “Add media” formatting option

2. Select the page tab that corresponds to your need:
   - **Upload**: Add a new image from your local computer.
     i. Choose the "Browse" button
     ii. Locate and select the image
     iii. Double-click the image name or click "Open"
     iv. Click "Submit".
   - **Web**: Enter the corresponding URL for the image, then click “Submit”.
   - **Library**: Find the image from the gallery presented, select it, and click “Submit”.

3. In the Embedding section, select a display size format and click "Submit". (Preview, Large, and Original generally increase in size, Default and Link do not apply)

4. Since the Alternative Text Description tag does not currently work in Media, right-click the image, select the Image Properties tab, and set the "Alternative Text" to describe the picture (as required for ADA compliance)

Additional image options can be set by in Image Properties (right-click image and select). On the Image Info tab, set Width, Height, HSpace (horizontal margin), and Alignment. Advanced options include Stylesheet Classes and Id.

Adding Non-Image Files (Documents, PDFs, etc)

Files such as PDFs, Word/Excel/PowerPoint documents, etc. are uploaded as files, not images. Web pages can contain a link to display one of these documents – which can reside on the same website or on an external website.

1. Add the text or image that will be used as a link.
   For example: “View the Announcement Flyer”

2. Select the text or image to be used as a link by highlighting it.

3. Click the Link icon
   - When linking to a document on an external server, enter the URL in the "URL" box
   - OR -
   - If you have a copy of the document, you can upload it to the server using the “Browse Server” button. Also use the “Browse Server” button to link to a document already uploaded to the server.
     a. If the file is not yet in the list, upload it using the interface
        1. Choose "Upload"
        2. "Browse" for the file on your local system
        3. Select the desired file and click "Open"
        4. Click "Upload" to move the file to the server (If the window does not disappear, close it.)
     b. Double-click the file to put the file name back into the Link window’s URL box

4. Click "OK" to enable the link