

# Drupal Training Guide

## Getting Started

Drupal Information page on the IT site: <http://it.santarosa.edu/drupal>

On this page is information about Drupal sign up, what Drupal is, which is a content management system.

### Signup to Migrate or Create Your Site

To start the process, IT needs to create a space on the server for your files and a URL address for your department site. See the sign-up link on the Drupal Information page. Look over the themes, as you will need to indicate what theme to assign to the site when signing up.

### Themes

You will need to pick a template or theme that dictates the layout of the pages of your site at the time you put in a request for a Drupal site. See the theme choices on the IT Drupal information page:

<http://it.santarosa.edu/drupal>.

IT recognizes that departments may have needs that are not served by the 5 themes to choose from. You may choose to use parts of the different themes in combination to get the desired layout. Contact IT if you need a variation on the themes shown on the IT Drupal information page.

### URLs are expressed as sub-domains

Sub-domains have the department name come before santarosa.edu with a dot between the department name and santarosa.edu. Most departments with 2 words have a dash between them, this would have been worked out with IT and your department when the account was first established by submitting an IT ticket. For instance the Study Abroad site is:

**study-abroad.santarosa.edu**

This URL is different than the earlier site that would reflect sub-folders of the site as appended to the end of the URL: santarosa.edu/study-abroad.

### Re-Directs from your old URL

If your department has an existing site in the old style, the URL will change when migrating to Drupal to be a sub-domain. IT will set up a re-direct so that anyone clicking on the old site will be automatically directed to the new site. This re-direct is not perfect. The opening or landing page of your site will re-direct to the new opening page just fine. But second level pages will direct to the new site to an “oops” or missing page.

For instance, santarosa.edu/slo will re-direct to slo.santarosa.edu. But the about page on the site: santarosa.edu/slo/about will re-direct to **slo.santarosa.edu/oops-something-went-wrong**. This page will show your opening page, except the heading and content will be replaced with missing page information. The navigation for your site will show, so hopefully your viewers will find the correct page to navigate to.

Your old site will be removed from the server soon after the migration. It is recommended that you back up your older files onto a hard drive or where you backup and store your files on a server or X drive. IT will coordinate with you when the old files get deleted from their server.

### Who can edit a site

Each person who wants to have editing and/or publishing rights to a site needs to be added by submitting a ticket to IT at:

<http://it.santarosa.edu/form/online-ticket-request>

There are 2 roles

1. **Editor** – can make edits, but does not have publishing rites
2. **Administrator** – has publishing and editing rites

In most cases, individuals a department chooses to have editing rights would also be tasked with publishing their edits. Consider your workflow and personnel responsibilities when choosing these roles.

## How to Access the Editing Interface

Log in to the admin/editing for your site by adding **/user** to the URL of your site  
For the Study Abroad site you would log in at **study-abroad.santarosa.edu/user**

Use your login information that you use for your SRJC email and other SRJC login points. Any individuals assigned to work on a Drupal site need to be in the JC system, assigned an SRJC email account.

### Landing Page

After logging in, you will arrive at a page listing your name, with two buttons underneath to View or Edit. The Edit button will take you to a page to edit the information about the user, not a place where you can edit a page. To edit a page, you can choose to enter the editing interface in two ways:

#### 1 Edit Button when viewing page

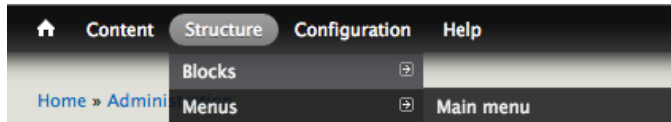
If your site already has pages and content, click on a page in your site navigation and then click on the Edit button.

#### 2 Top Navigation Bar

Look to the top of the page and you will see a black horizontal bar with navigation links.

- **Home** icon takes you to the home page of the site. Using the Edit button once on the home page will open up the editing interface to edit the home page.
- **Content** link takes you to the main Administration page with links to all the pages
  - Under the Content link is a sub navigation drop-down with a choice of **Add Content**
  - The Add Content pop-out menu nav leads to **Basic Page, Slide, Staff, and Web Form.** Choose one of these links when creating a new basic page, new slide for a slideshow, a new staff page, or a new web form
- **Structure** link for creating blocks and menus (more later on this)

#### Structure and Content sub-navigation



### Main Content Page

Clicking on the Content link (not one of the sub-navigation links) will take you to the main Administration page, your main hub to finding pages or slides to update. From here will see a list of all pages and slides in your site.

[+ Add content](#)

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**SHOW ONLY ITEMS WHERE**

status

type

---

**UPDATE OPTIONS**

---

| <input type="checkbox"/> | TITLE                                   | TYPE       | AUTHOR     | STATUS    | UPDATED             | OPERATIONS                                  | WEIGHT                         |
|--------------------------|---|------------|------------|-----------|---------------------|---|--------------------------------|
| <input type="checkbox"/> | Test for Demo                           | Basic page | chaverinen | published | 04/05/2015 - 4:13pm | <a href="#">edit</a> <a href="#">delete</a> |                                |
| <input type="checkbox"/> | Prospective SRJC Instructors            | Basic page | chaverinen | published | 04/05/2015 - 3:47pm | <a href="#">edit</a> <a href="#">delete</a> |                                |
| <input type="checkbox"/> | Rich History of Study Abroad <b>new</b> | Slide      | chaverinen | published | 03/16/2015 - 3:50pm | <a href="#">edit</a> <a href="#">delete</a> | <input type="text" value="0"/> |

## Filtering the List of Links

You can filter what types of content to view, which is helpful when working on a large site. You can filter by:

- **Status** drop down to view just pages that are published or not published, promoted or not promoted, sticky or not sticky. On most sites you will just be dealing with published or not published. Promoted is for promoting information to the front page. Sticky works for similar content that you want to keep on the home page. Both of the promoted and sticky content features work much like using a blog or event list that changes on a regular basis.
- **Type** drop down to view just basic pages, staff pages, slides, or web forms

## Weighting/Ordering

You can set the order of slides and pages by using the weight category from the main content page. Use the numbers to set the order to the slides or pages. There is a range from -19 to 19, with 0 being the middle setting. By default, menu links are set to 0, so if you did not set a weight when creating the link, there may be several 0 weighted links. The links will be ordered then alphabetically.

## Main Menu

You can set the order of pages more easily from the **Structure > Menus > Main Menu** view. In this view you can drag and drop pages to change the order of the main menu and also nest links.

| MENU LINK                                   | ENABLED                             | OPERATIONS  |
|---|-------------------------------------|-------------|
| + Study Abroad Home                         | <input checked="" type="checkbox"/> | edit delete |
| + Programs                                  | <input checked="" type="checkbox"/> | edit delete |
| + Barcelona Fall 2015                       | <input checked="" type="checkbox"/> | edit delete |
| + Barcelona Fall 2015 Information           | <input checked="" type="checkbox"/> | edit delete |
| + Barcelona Fall 2015 Classes               | <input checked="" type="checkbox"/> | edit delete |
| + Barcelona Application Process             | <input checked="" type="checkbox"/> | edit delete |
| + ROME SUMMER 2015                          | <input checked="" type="checkbox"/> | edit delete |
| + Rome Summer 2015 Information              | <input checked="" type="checkbox"/> | edit delete |
| + Rome Summer 2015 Classes                  | <input checked="" type="checkbox"/> | edit delete |
| + Rome Summer 2015 Classes (PDF) (disabled) | <input type="checkbox"/>            | edit delete |

The screen shot above shows the menu list of pages on the Study Abroad site, with some links nested into categories. See the screen shot to the right to view how the nested links display on the page.

Notice in the Main Menu view you can choose to disable pages, delete pages, and choose **edit** to open a page into editing mode.

## Adding a Page

You can choose to add a new page in a couple of ways.

1. From the Content link in the black nav bar, choose **Add Content > Basic Page**.
2. From the main Administration page, click on the **+ Add Content link** and then click on the **Basic Page link**

The result of creating a new page will be the Create Basic page view. From this view, in the first available field you will

Study Abroad Home

**PROGRAMS**

**BARCELONA FALL 2015**

- Barcelona Fall 2015 Information
- Barcelona Fall 2015 Classes
- Barcelona Application Process

**ROME SUMMER 2015**

- Rome Summer 2015 Information
- Rome Summer 2015 Classes

Title \*

add a **Title** to the page. This title will determine how the page is listed in the main Administration page, and will be the first heading on the page (heading level 1).

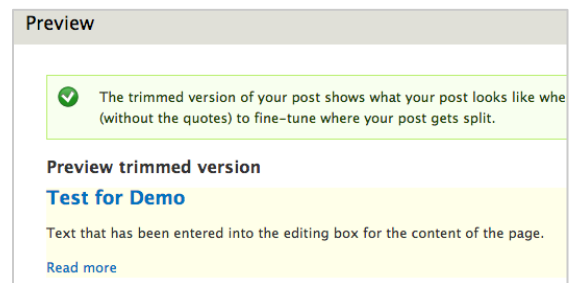
The main menu link will be determined by the text entered in the **Menu link title** field near the bottom of the page in the **Menu Settings area**. It is a best practice to have the text input in the Title match what is input into the Menu link title. This will help the viewer feel orientated to the site and navigation.

In the Menu Settings area, you can also input a **Description** for the page that will display a tool tip revealing the description when the viewer hovers over the link in the menu.

You can choose to nest the link for this page by choosing from the drop down for **Parent item**. By using the **Weight** number, you can determine the order of the menu link corresponding to the page.

### Saving and Publishing Pages

You should always be sure to click on the **Save** button at the very bottom of the page to save your edits, or your work may be lost. You are also provided with a **Preview** button to view your page, and a Delete button if you choose to delete the page. Previewing the page will treat the information entered as a post and just shows the entered information at the top of the editing interface as a “trimmed version” preview (see screen shot to the right). Saving the page will open you up to actually see what it looks like.



You can **Publish** your page before linking it up with navigation. Publishing a page does not make it show to the public unless you also add a menu link. To publish the page, access the **Publishing options** link at the bottom of the page. Then turn on the **Published** check box. Add the **Menu Link title** when you are ready to publish and have the page be visible to the public. This is a concern if your site has already been made an active site, meaning IT has hooked up navigation elements on the SRJC site to go to your new Drupal site. So don't turn on the menu link until you are ready for your page to be viewed by the public.

### Adding/Editing Content on a Page

Drupal provides an editor for adding/deleting/editing content. Once you access the editing interface, the editor provides functions that should be familiar to you if you have used Word, other editing software, or other content management systems.

#### Body (Edit summary)



Looking at the arrangement of icon buttons beginning from the left, the editor has buttons to create bold text (B), italic text (I), underscored text (U), strike-through text (S), align left, align center, align right, justify, bulleted list, numbered list, decrease indent, increase indent, undo, redo, link, unlink, anchor (to create a link to a place on the page, as opposed to another page, sometimes called a jump link), insert picture, superscript, subscript, block quote, page source (to view the HTML), insert horizontal line, paste as plain text, (on the second row in the screen shot) paste from Word, show blocks, remove format.

## Removing formatting

When pasting in text copied from other sources such as Word, emails, web pages, etc. the text will come with some formatting that gets copied behind the scenes. The paste as plain text, paste from Word, and remove format functions can help to remove unwanted formatting.

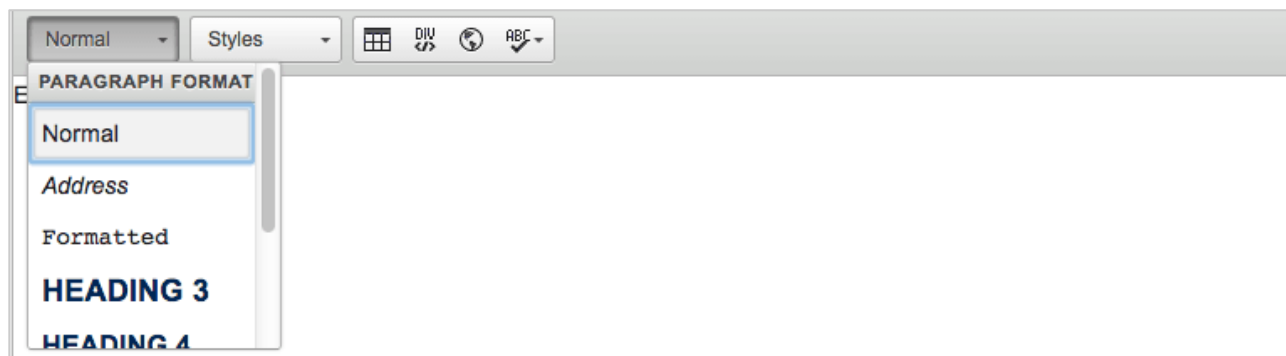
## Heading tags and accessibility

When you arrive for the first time at a page, you are likely to scan the document to get an overview of the page. This will help you decide if you want to stay and where you will want to start reading. Visually disabled users who use screen readers to access documents will want to do the equivalent. By making use of heading tags, they too can get a scan of the page. They can choose to hear all the headings first, or they may jump through the page by advancing to the next heading.

If you have a fair amount of content that does not have any headings, the screen reader user may have a hard time reviewing content when going back to review, as the document or page is not very navigable. The user will not have the ability to tab around the page easily to find or preview content.

## Heading level hierarchy

Pay attention in particular to what heading styles are brought over. When copying, it is important to stay within the heading style numbering scheme that is already in play on SRJC Drupal sites. There are Heading 1, Heading 2, Heading 3, Heading 4, Heading 5, and Heading 6 tags that can be used in the HTML behind the scenes. The numbering needs to reflect a hierarchy that fits with the content, and with the headings already assigned on the page. This is important for accessibility compliance and increases semantic value, which may affect search engine optimization (helping search engines index and display your site in searches).



The drop-down menu for **Paragraph Format** is located directly under the icon buttons. Notice in the screen shot that the first heading available is a Heading 3. That is because Heading 1 and Heading 2 have already been applied to your page. If you copy text from other sources that bring over formatting, you may end up with a Heading 1 or Heading 2 in your copied text. Using one of the removing formatting options will remove the heading tags, allowing you to assign the correct tag from this drop down.

## Adding/Editing Hyperlinks

Creating and modifying links is as easy in Drupal as in Word. Highlight the text, use the link icon (chain) to add a link, the unlink icon (chain with an x) to remove a link. Check your links carefully, it is one of the first signs that your site is out of date and can affect the viewer's perception of the content's relevance.

## Accessibility Compliance of Hyperlinks

There are a few important considerations when creating hyperlinks:

- Make unique, descriptive hyperlink text. Never make more than one link on a page have the same hyperlink text but go to different locations. (e.g. two links that say "Read More", but go to different pages). You should elaborate, and describe in the active hyperlink text where the viewer is going.
- Do not use uninformative link text such as "Click Here" or "Click For Details" or "Read More". You want to provide more information about the linked content, such as "Read more about cute kitties."
- Make links as concise as possible while still being informative. Don't make a whole paragraph be a link.

- Don't make your link area too small, such as one very short word, in consideration of those with mobility issues.
- Avoid URLs as the hyperlink text, unless the URL is short. It is very tedious to listen to a long URL be read by screen readers and they look bad on the page. Many people still hang onto the practice of putting the URL in as hyperlink text because of the concern of those that print the page will end up with no knowledge of the URL. When printing from the later versions of Chrome and Firefox, the link URL is printed as well.
- Do not have empty links. This can happen behind the scenes in the HTML when deleting linked text. Sometimes the link tag remains, though empty.
- In most cases, you should not have your links open to a new window, as this can be confusing for the screen reader user. There are cases where you still might want to do this, consider notifying the viewer.

### Siteimprove Reports – Broken Links

SRJC has a subscription to Siteimprove, which is a tool to help check your site for broken links, misspellings, and accessibility compliance. If your department has not been contacted about getting the reports sent to you, contact the IT department to get set up to use this tool.

### Email links

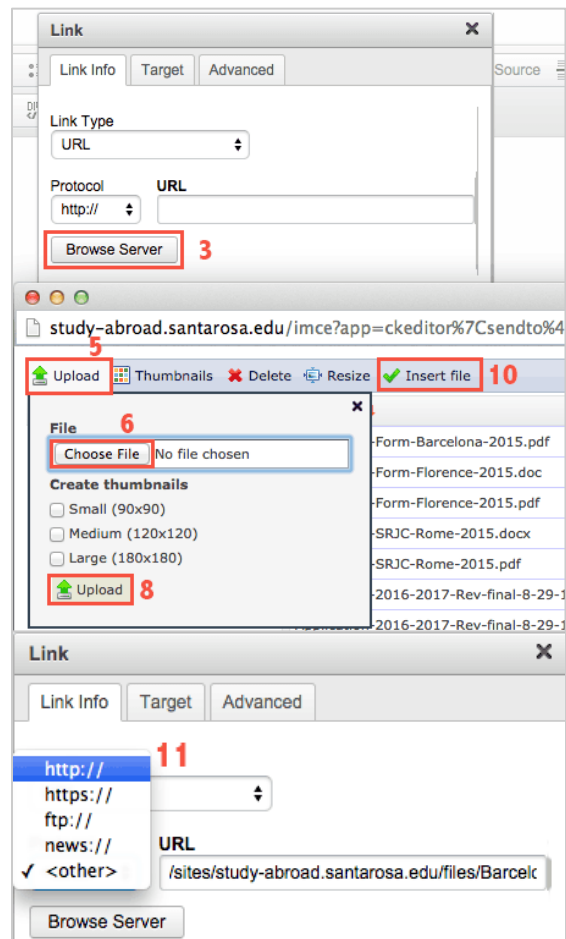
- In the Editor, highlight the text that will become the link
- Click on the Link icon
- In the Link dialog box, change the Link Type drop down to E-mail
- In the E-Mail Address field, input the email address
- The Message Subject and Message Body are optional

### Linking to Documents such as PDFs and Word docs

Linking to documents involves uploading the document to your site files and creating a link to it. For those migrating existing sites to Drupal, be careful not to link to the PDF where it currently lives on the server. When copying and pasting existing text from your current site, the links may remain intact and you may think that you have successfully completed the text migration. You will need to upload the document and change the link or when your old site files are removed, your links will break.

Follow these steps when linking to a document:

1. In the Editor, highlight the text that will become the link
  - a. Make sure the text is descriptive of what you are linking to
  - b. It is a best practice to include the type of file in the link (PDF or Word doc)
2. Click on the Link icon
3. In the Link dialog box, click on the Browse Server button
4. In the File Browser dialog box that opens, you can select a PDF that is already uploaded OR
5. Click on the Upload button in the upper, left of the browsing dialog box
6. Click on the Choose File button
7. In the browsing dialog box that opens, browse to your document you want to upload and select it
8. Select the Upload button
9. The file will upload and become highlighted in the list of files
10. Back at the top of the File Browser dialog box, select the Insert File button
11. Back in the Link dialog box, make sure the drop down under Link Type is set to **http://**



## Accessibility Compliance of PDFs

Effort should be made to make accessibility compliant PDFs. IT will be arranging accessible PDF trainings for staff in the future.

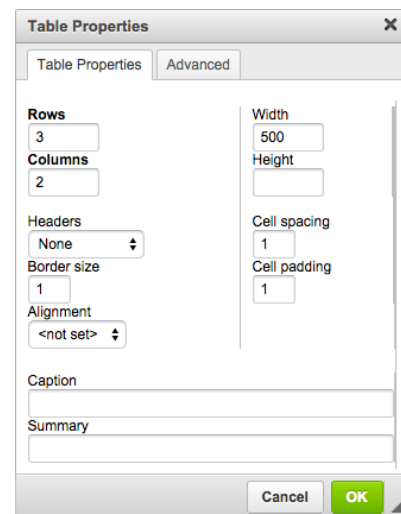
## Tables

Create data tables in the Drupal editor by accessing the table icon. Style sheets behind the scenes style tables by default to have black text on alternating rows of light gray and white with a 1 pixel border around the table. Text size is set to be smaller than body copy, although if a user sets text to be in paragraphs, the text will be the same size as body copy. Text can end up in paragraphs when copying and pasting from other sources, or by hitting the return or enter key when inputting text. To set the text to be in a paragraph, you can select the text and then choose **Paragraph** from the **Styles** drop down in the editing box.



## Table Properties

When creating a new table, you will be presented with a Table Properties dialog box. You may also access the Table Properties dialog box by right-clicking anywhere in a table and then choosing Table Properties. In this dialog box, you can set the number of rows and columns, set the width of the table in pixels (you can also set the height, but it is not advisable), and border size (sets the border size of the cells). Cell spacing and cell padding set the amount of space between the cells, or the space between the text and the edge of the cell, but these settings are controlled by the style sheets, so best to leave them be.



## Table Caption and Table Summary

Use the caption field if you want to add a caption visible above the table. Table summaries do not show visually, and are used for accessibility. The table summary has been used to describe a complicated table for the screen reader users before they read the table. It has been deprecated in the latest version of HTML, however the accessibility community still recommends using a summary for complicated tables.

## Adding or Deleting Rows and Columns

Right-click on the table and choose Rows or Columns. You will be able to Insert a row or column before or after the selected row or column, and delete them as well.

## Cell Properties

When right-clicking on a cell, you can merge and split cells and access Cell > Cell Properties. In the Cell Properties dialog box, you can set alignment of the text, and set background colors and border colors of the cells. Rows span and columns span can also be set, effectively merging cells.

## Table Cell Headers for Accessibility

Table cell headers are important for accessibility compliance and visually help your viewers understand the relationship between cells that define content to the cells below or to the right or left of the header cell. Most commonly, table cell headers are used in the first row to define content for the cells below them. You can set table cells to be header cells in the Table Properties or Cell Properties. The style sheet has a style that puts a thick gray border under the header row of cells. See the following example of table headers.

|            | Col Header    | Col Header       | Col Header | Col Header | Col Header   |
|------------|---------------|------------------|------------|------------|--------------|
|            | Breed         | Type of Breed    | Coat       | Lap Cat    | Adult Weight |
| Row Header | Bengal        | Hybrid           | Short      | No         | 15           |
| Row Header | Scottish Fold | Natural/Mutation | Short      | No         | 9            |
| Row Header | Siberian      | Natural          | Long       | Yes        | 14           |
| Row Header | Tonkinese     | Crossbreed       | Short      | Yes        | 10           |

## Blocks

Access the Blocks area by going to the top navigation bar, **Structure > Blocks**. This area allows you to move types of features into regions of the page. The **Featured region** is the top of your page, just under the SRJC header. You can drag a Carousel to the Featured region to install a slideshow at the top of your page(s).

| BLOCK                              | REGION   | OPERATIONS                |
|------------------------------------|----------|---------------------------|
| <b>Navigation</b>                  |          |                           |
| <i>No blocks in this region</i>    |          |                           |
| <b>Featured</b>                    |          |                           |
| + View: Clone of Carousel: Complex | Featured | <a href="#">configure</a> |

To set the pages that will include the carousel (or other feature), click on the **Configure** link in the **Operations column**. Near the bottom of the resulting page, you can set whether the feature is to be on **All pages except those listed**, or **Only the Listed pages** by selecting one of the radial buttons. To place it only on the front page, click on **Only the listed pages**, and enter **<front>** in the box underneath.

## Creating New Blocks

You can create new blocks by going to **Structure > Blocks > Add Block**. You will need to input a **Block title** and **Block description**. The Block title will show on the page as a heading. The Block description field is for identifying your blocks in editing mode when looking at the page of blocks. You will also need to set a **Region Setting**, or else the block will not appear visually on the page. Access the dropdown menu to choose from the list of possible regions.

Following is an example of using 3 new blocks to create a right sidebar on the page.

| Right Sidebar          |               |                           |                        |
|------------------------|---------------|---------------------------|------------------------|
| + New Info Block 1     | Right Sidebar | <a href="#">configure</a> | <a href="#">delete</a> |
| + New Info Block 2     | Right Sidebar | <a href="#">configure</a> | <a href="#">delete</a> |
| + Contact + Email List | Right Sidebar | <a href="#">configure</a> | <a href="#">delete</a> |

## Photos

Photos can be placed on Drupal pages in a number of ways. If you encounter problems with uploading images, make sure you are not exceeding the allowed size of image in either pixel dimensions or in MB (megabytes), or uploading a size that is too small in pixel dimensions. Size limitations are listed next to the Upload button.

If you are attempting to upload an image that has the right parameters and still cannot do so, be aware that the Drupal system has a frequent issue with permissions issues when uploading photos. Contact IT to see if this is the issue.

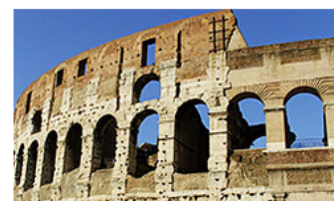
## Header and Teaser Images

When you enter the editing interface for a page, you have the choice of choosing a **Header Image** or a **Teaser Image**. Uploading an image to these fields will not show on the page unless you have set up to use these features in the block editing area (see more in Blocks).

## Slideshows

Slideshows also need to be placed in a block area to be shown, as described in the Blocks section, above. Additionally you need to upload each image into a **slide content type**. Think of this as a page to your

### ROME SUMMER 2015 IS FULL!



Rome Summer 2015 Flyer

### AVAILABLE NOW

[Barcelona Fall 2015 Information](#)  
[List of Barcelona Classes](#)

### CONTACT INFORMATION

#### STUDY ABROAD OFFICE

Room 1525 Emeritus  
Santa Rosa, CA 95401  
707-527-4441

[studyabroad@santarosa.edu](mailto:studyabroad@santarosa.edu)

or contact Patty Warne, coordinator:  
[pwarne@santarosa.edu](mailto:pwarne@santarosa.edu)

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slideshow. You will need a different slide content type for each slide. To create a new slide content type, go to **Content > Add content > Slide**. On the Slide page you will have a button to upload an image. The image will need to be at least a certain size. You will be able to crop the image to select what areas to show. In fact, the required size to upload may cause you to create an image that needs to be cropped to show the essential parts of the image.

For the Complex Carousel, you will also be able to enter text to display with the slide image.

### Inserting Images in the Drupal Editor

You can use the Drupal Editor to insert images into the body of the page. You can also use this method to place an image at the top of a page. An image of 800 pixels wide will fit the same width as the body of the page in the Baker theme with one column of side navigation and one column of content. The image will show beneath the Page Heading 1, as opposed to above it if you are using a block in the featured region for an image or slideshow.

### Responsiveness of images

Images that are wider than 360 pixels will collapse down on smaller screens and devices, constraining the width but not the height. To make the image constrain proportionally as it collapses, click on the image and then click on the image icon, or right-click on the image and choose Image Properties. In the Image Properties dialog box, click on the Advanced tab. In the Style tab you will most likely see the width and height of the image. Replace this code with the following code:



```
max-width: 100%;
```

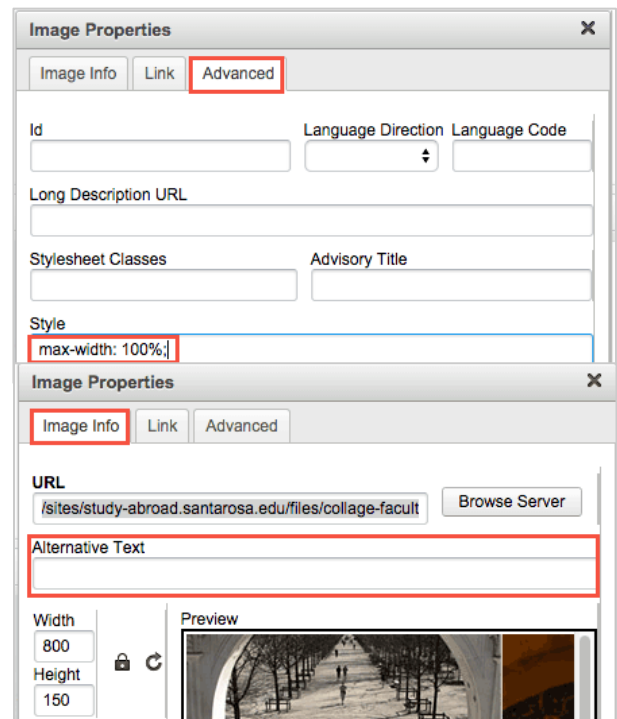
### Alternative Text on Images for Accessibility

When placing images onto web pages it is important to add what is called “alternative text” so that visually disabled viewers using screen readers will have information about the image. Ideally alternative text should be a short phrase that succinctly describes the image.

To assign alternative text to an image, access the Image Properties dialog box either at the time you are placing an image, or afterwards by right-clicking on the image and choosing Image Properties. On the Image Info tab that usually be selected by default, see the Alternative Text field directly under the URL field.

### Basic Tips on Writing Alternative Text

- Keep in mind that the text will be machine read.
- Use words as opposed to abbreviations.
- Write a phrase that is succinct, but adequately describes the image.
- If there is text in the image that is important, that should be included in the alternative text.
- Don't include "Image of ..." or "Graphic of...". Screen reader software announces "graphic" before reading the alt text.



[See the article on the WebAIM site about writing effective alternative text](#)

### Empty Alternative Text

The Drupal system is configured to create empty alternative text if you leave the Alternative Text field blank in the Image Properties dialog box.

- Consider if the alt text is useful content, if not, give it empty alternative text by not inputting any text in the Alternative Text field
- If the explanation for the image is in the body text adjacent to the placed image, use empty alt text

### Aligning Images to the Left or Right

In the Image Properties dialog box, access the Alignment drop down to float an image right or left. Put in numbers for pixel values to add more space around the image in the HSpace or VSpace fields.

### Width, Height, Border

Width and Height values can be set on the image to resize it, and a border value may be added to put a border around the image. Again, the number you enter into the border field will be in pixels. The color will be the maroon red that you see in the header of all SRJC pages and is controlled by the style sheet behind the scenes.

