times-up.org Drupal 7not-so-quick quick-guide - RM, 3/2013

DRAFT

Hi! Welcome to the not-so-quick quick-guide to updating times-up.org using the Drupal 7 CMS (content management system) with which the site was built. More advanced instructions and **links to Drupal documentation** are in the 'Advanced' sections of this guide.

To log in for editing: http://times-up.org/user

Glossary of terms used in Drupal:
- 'frontend': the site that the public sees
- 'backend': the administration ('admin') area where we log in to update content
- 'field': refers to one of the many areas where content is edited or added.
- '**node**': a content item that displays on a website page (ie: the stuff in the center column
- 'teaser': The clickable short preview of a page ('node') that shows a thumbnail image and brief text
- 'wysiwyg': Pronounced 'wizzy wig'. Refers to a 'what you see is what you get' editor window that allows you to add and edit text much in the way you would with MS Word.
- 'block': Container for various chunks of content placed outside of nodes in the side columns, footer, header.
- 'taxonomy': Essentially an outline of the site's content structure of sections (vocabularies) , and subsections (terms) used to tie related content together in various displays.
- 'view': an advanced Drupal feature for building displays of related content.
- HTML: the code used to make webpages. We create webpages with Drupal, and Drupal spits out the HTML for the browser to interpret and display.
- 'stylesheet': a centralized text document that all the pages on the site look to for formatting instructions (text sizes, colors, spacing etc). Uses 'CSS' ('cascading style sheets').

EDITING/ADDING CONTENT:

IMPORTANT: **Do NOT paste content directly from MSword** or other formatted word processing program into the content editor window. It creates extra work for others. More on this below.

IMPORTANT Filepath/url info: Broken internal site links and missing images are usually fixed by correcting the path:
- A leading slash (/) fixes many broken internal links. Example:
  Broken: bike-co-op/welding-workshops **Fixed:** /bike-co-op/welding-workshops
- The **default filepath** to images from the old xup site: **/sites/default/files/uploads/**
  Example: /sites/default/files/uploads/images/bike_coop/workshop-tube.jpg

TIPS:
- While editing the site, use one browser to view the backend (admin) and another to view the frontend (refreshing to see changes).
- Look at pre-existing content in the backend as an example as to how things are done.
- Once logged in, you can open multiple back end items simultaneously on different browser 'tabs'

IMPORTANT: You may not be able to edit a number of things that you see on the site (such as things that appear in the header, footer and side columns). These are currently set to be edited by advanced site updaters.

To edit existing content, you may either:

- While viewing the site with a logged-in browser, navigate to the existing item ('node') via the site menus, then click the 'edit' tab at the top of that item's content.
- On a section index page (like the campaigns sub-pages in the top menu), hover over an item and click on the gear graphic that pops up towards the right and the resulting 'edit' link you'll see there.
- Click the 'content' link at the very top left of the site admin and find the item in the list. You can narrow results by using the 'type' dropdown field. Most content is of the 'basic page' type. Press center pages are of the 'book page' type.

To add New content, you may either:

- Click the 'content' link at upper right of admin, click '+ Add content' at the upper right, then choose your content type.
- Click one of the 'add' links in the shortcut menu at the top of admin.

Content (node) types for times-up.org:

- **Basic Page:** most of the pages on the site, aside from 'press center' pages
- **Basic Page – 2 column:** same as basic page, but makes 2 columns – typically text on left, images on right
- **Book Page:** pages in the 'press center' are organized into 'books', a Drupal way of organizing large related collections of content. We can create books for other sections in the future.
- **Calendar Event:** nodes for the calendar (see calendar section below in this guide).
- **Home Slide:** for the homepage slideshow
- **News:** News items to show on the homepage, although technically, *any* node can assigned to the homepage.

The Editing Interface: (**TIP:** Most of these fields have explanatory text just below them. Fields vary per content type.)

Typical fields:

Title - The text that appears at the top of the content on a page.

Recurring event reference - makes this node (page) available as a link on calendar event nodes (pages).

Section - assign the node to a section of the site

Image for teaser - This the 300 x 200 image that will appear in the 'teaser' (preview) of the node on the homepage or a section page. It's best to include if it'll appear in either of those locations, but not required. **IMPORTANT:** the image must be edited in advance to be 300 pixels wide by 200 pixels high, 72dpi. (See PhotoShop tips below).

BODY field – Main content area of a node (page).

IMPORTANT: Just below the *Body* field, in the 'Text Format' area, there are 3 editing modes available for the *Body*:
- *Default editor* – choose this to see and use the 'wysiwyg' editor.
- *Full HTML* – choose this when needing to enter content with more advanced 'tags' (like when embedding video), if you know what those are.
- Plain text - thoroughly strips inputted content of all HTML and other code.

Edit Summary field: click this link to open up a optional field where you can custom design what will appear as the node's teaser content, otherwise the first chunk of content will be used. This is helpful when the main content begins with a large image that would take up too much room in the teaser.

Hover your mouse over the buttons in the wysiwyg editor **for popup text** that explains their functions.

IMPORTANT: *Don't get fancy with formatting and aligning text etc.* Let the website's central stylesheet apply the site-wide consistent formatting.

IMPORTANT: Try to make sure text being copied and pasted into the 'Body' field is *'plain text'* and clean of formatting. **Do not copy and paste directly from MSword or a webpage** - paste into, and copy out of TextEdit or NotePad first OR use the 'paste as plain text' or 'paste from word' buttons in the wysiwyg toolbar area. You can also click 'source' button on the editor toolbar, then paste the content in to clean it.

TIP: Drupal is set to preserve 'whitespace' - in other words, Drupal will preserve the paragraph spaces in your pasted text. **FYI, use 'shift + enter' to create single linebreaks.**

To create links, or **apply some other function to a piece of text**: *highlight the text,* then click the related button in the wysiwyg toolbar. Choose 'new window (_blank)' on the 'target' tab when linking outside times-up.org.

IMAGES in the 'Body' area:

IMPORTANT: Edit images to final size and optimize for the web before uploading. (more info on this below in this guide).
Images can be inserted into the body text by placing the mouse cursor where the image is to go, then click 'Image' button towards the center of the wysiwyg toolbar. You will have the option to select an image from the site's media library (click 'browse server') or upload a new image. There is also the 'Insert image or link' just below the 'Body' field, which can be used in non-wysiwyg

mode. You can double click an existing image in the body field to edit it's options.

TIP: to place new image in an existing folder on the server, click 'browse server', then navigate to the desired directory before uploading.

NOTE: Currently, there isn't a way to create new folders in the image library via the media/image interface. Hopefully, more on that soon. Meanwhile, directories can be created via FTP.

Right Column **field on 'Basic page - 2 column'** nodes only: Similar to 'body' field. This faciliates creating a right column of stacked images. Text size is smaller to make captions look nice. **TIP: to move caption text just one line below image use 'shift + enter'** ('enter' alone creates full paragraph break). Sample page: **http://times-up.org/2-col-test**

Section - **Very important**. Select the section of the site that the node is to be included in. An existing page may be moved to a different section here. More sections may be created, but that is advanced territory.

Tags – optional: keywords that relate to the nodes' content

Menu settings - Often not needed. This where the node can be added to site's top or various section menus. Nodes are automatically added to 'books' and things like the 'rides' dropdown menu that appears in the right column of ride pages.
    To add a page to a menu:
    - check 'provide a menu link'
    - enter very short text that will appear in the menu
    - choose the 'parent item' (ex: <main menu>, --About)
    - the 'weight' determines where I the order the item appears
    - the rest of the options can be left blank

 Weight - Generally not needed. A node's weight is it's place in the order of items in it's section. This gives the option of re-ordering things. Best to determine via in the 'menu settings' weight.

URL path Settings - Generally leave alone. A url will automatically be generated based on the selected section and the node's title. This is where a nice, human readable url is set. IMPORTANT: the page's section, if there is one, should set first. If custom creating a url enter the node's section followed by a forward slash and the page name. NO spaces (dashes or underscores between words), ALL LOWER CASE. **Example: about/who-we-are**. See existing pages for other examples.

To preview your edits and/or save them:
Scroll way down the edit page and click 'preview'. You'll see a rough preview of the edited content, but much of the formatting/layout may not show in preview. Then scroll down to continue editing. **Remember**: to most clearly see what the public sees, view the front end in a browser separate from the logged in browser, and refresh the page to see your changes. (While editing, I use *Chrome* for the back end and *Firefox* to view the front end).

IF you're pretty sure of your edits, you can click the 'save' button and see the complete view of the changes.

NOTES ON THE SPECIFIC CONTENT TYPES:

NEWS section items – (homepage content):

News items on the homepage mostly use the 'News" content type. (Although, technically, any node can be assigned to appear on the front page).

Although the layout is slightly unique, you'll create or edit existing News nodes pretty much as you would w any other content type. Most of the fields have explanatory text beneath them.

IMPORTANT: The image for the 'image for teaser' must be edited in advance to be 300 pixels wide by 200 pixels high, 72dpi. (See PhotoShop tips below).

THE CALENDAR:

To find an existing 'calendar event' item (node):
Click 'content' at top of admin area, then filter by 'calendar event' to see list of calendar nodes.
OR
In a logged in browser, navigate through the various calendar areas and click on the desired item. You should see an 'edit' tab at the top of the item.

To create a new item:
Click 'content' at top of admin area, then '+ Add content', choose 'Calendar Event'
OR
Click 'Add a Calendar Event' shortcut link at top of admin area.

The Calendar Event edit page has explanations under most of the entry fields. Everything below the 'body' field can be left alone.

If you don't see an appropriate 'Recurring Event' or 'Location' option for the event, these can be created by the site admin (rogermanningnyc@gmail.com)
OR
If feel confident, click "Structure" at the top of admin, then 'taxonomy ' >> 'add terms' (individual item) in the row for the relevant 'Vocabulary' (collection of terms).

To edit/improve the descriptive text for an Event Location or Recurring Event, click the 'list terms' link instead, and then the 'edit' link for a term. There is also an 'add term' at the upper right of the term list view.

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PRESS CENTER (book nodes):

To add an item to a section of the Press Center portion of site:
- Choose, 'book page' as the content type
- Be sure to chose the 'Press Center Section'
- After filling in the content, be sure to complete the 'Book outline' area towards the bottom of the editing page. 'Weight' refers to the order the node will appear in it's 'book', but this is best set in the next step.
- **To work on the order of items**(nodes) in a 'book', go to 'content', the click the 'books' tab at the upper right. Opening a book on this page takes awhile due to their size. You may drag items around by clicking the cross to the left, or click 'show row weights' at the upper right, and order numerically.
- **To add a year to a Press Center Section:** create a new book page 'content >> add content >> book page' (or use the shortcut link). Title the new book page by year/section (ex: '2013 Coverage'), then select the related 'parent' (ex: 'Press Coverage') via the 'Book Outline' section towards the bottom of the editing page.

HOME SLIDEs:

Find the existing image in the homepage slideshow by clicking 'content' in the admin top menu, then sorting by the 'Home Slide' type. You can re-use existing Home Slide nodes to place new images in the slideshow if are also removing the existing image on that slide. Else wise, create a new Home Slide node and place an image in it.
IMPORTANT as heck: Homepage slideshow images MUST, MUST, MUST be pre-edited to 640 pixels wide by 150 pixels high at 72dpi, and optimized for the web (see PhotoShop tips below). This very likely means creating a cropped version of the photo.

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MORE:

IMAGES inserted in page content:

IMPORTANT: Resize and optimize images to their final intended size before uploading. This will result in best viewing quality and download speed for the viewer.

If you have **PhotoShop**:
- 'image>>mode': choose RGB
- 'image>>image size': 72dpi, 450pixels wide maximum to fit into center column content. Slideshow images: 600w x 400h for landscape; 320w x 400h for portrait.
- 'file>>save for web': jpeg (photos, complex images): quality 60 is fine; gif (logos, solid fields of color): reducing number of colors reduces file size, usually not critical

IMPORTANT
- It's best to organize image or other files in folders on your home computer before uploading.
- Use proper web style filenames: lower case letters; only letters, numbers, underscores and dashes are allowed.
- No spaces – use underscores between words (dashes ok too).
- Name files so they sort by name in the order you want them to. Use at least one zero before single digits. An example:
flowers_rose.jpg
flowers_daisy.jpg
flowers_tulip_01.jpg
flowers_tulip_02.jpg
flowers_tulip_03.jpg

STANDARD PHOTO DIMENSIONS for times-up.org:
Main image on an article: 580 pixels max width
Teaser image for homepage section page items: EXACTly 300 pixels wide x 200 pixels high
Homepage slideshow images: EXACTly 640 pixels wide x 150 pixels high

BTW, Multiple image upload to the media library: ('content>>media' (tab at upper right))
One may uploading more than one image at once in the 'media' area by clicking the '+ Add file' link at the upper left. These images may then be inserted as described above while editing a node.
NOTE: images from the old times-up.org site were uploaded separately and won't show in the list of files displayed here. **NOTE:** Currently, there isn't a way to create new folders in the image library via the media/image interface. Hopefully, more on that soon. Meanwhile, directories can be created via FTP.

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Drupal Documentation links: We are using Drupal, version 7.

May First FAQ has some useful info (scroll down to 'Web Site Related' area):
https://support.mayfirst.org/wiki/faq

The Drupal website and it's documentation section is vast, and perhaps less than useful in the beginning, but here it is: **http://drupal.org**

TIP: Often, answers can be found via google.com. Type in 'Drupal 7', followed by your topic. Example: 'Drupal 7 add item to a menu'

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ADVANCED: Things that most site editors won't see, but we can change that ☺

Taxonomy: ('structure >> taxonomy')

A bit confusing at first. The site content structure of sections , and subsections, are handled via the Drupal 'Taxonomy' feature. The main section (called a 'vocabulary') is called 'main'. Under 'main' are the subsections (called 'terms') *about*, *campaigns* etc etc. *Event Locations, Recurring Events, Press Center, and News* are also vocabularies.

Blocks: ('structure >> blocks')
'Blocks' are various chunks of content placed outside of nodes (main content) in various locations on the pages of the site (such as the side columns, footer, header, and areas of the homepage). This is an advanced area in that various types of blocks fall within expert area.

Views: ('structure >> views' – Experts only!**)**
A 'view' in Drupal is a customized collection of content (in database speak, a 'query'). The 'upcoming events' display at the top of various ride pages is a 'view' displayed within a 'block.' Clicking on the small 'section' link at the bottom of some content takes one to a section 'view' displaying 'teasers' of all the nodes set to that section while editing. The homepage slideshow is also built using a view.

Site information: ('configuration>>system>>site information')
Site title and slogan as they appear in the header are edited here.

Theme: A set of files that determine the look and layout of the site. Expert stuff.

Module: An additionally installed mini-program designed to work with Drupal that adds specific functionality to our site. Expert stuff.

Updates for modules and other items: Only the site administrator handles these as the site database and files need to backed as part of this process.