Content Management

This course provides an introduction to content management in the Drupal CMS used at UNT. It is geared toward new/novice users. The overall goal of the course is to understand how to author and manage content in Drupal. No advanced experience in web development is assumed. Students are suggested to follow up with additional training sessions and online materials.

What is / is not “Content” in Drupal?

1. Content is the words & media that are managed through a series of web forms, often, but not always, mapping to the main body of a webpage on the site.
2. For this course, content management is most concerned with the day-to-day creating/editing of words-on-page and the larger organization patterns of content on the site.
3. We are most concerned with the “primary intellectual content” of the page, and somewhat less-so additional information that may also show up on page.
4. Due to time constraints we are NOT concerned with basic site-configuration topics like: Changing the site name, user info, or the visual layout of most pages. Similarly we can’t cover best practices for designing images, permissions with users, or installing and configuring advanced modules.

Important Caveats

• No two Drupal sites are exactly alike.
• You may share some/many of the same tools with other sites, but can’t always assume this is true
• A Drupal site typically makes use of many 3rd party ‘modules’ for adding functionality. Often there are multiple modules that let us accomplish similar goals, but may have different ways of going about it.
• If you are inheriting a site from someone else, you are getting his or her good/bad habits. The number of users touching the code multiplies the possible problems you will inherit. Take time to learn how they have organized content before adding your own materials in new/different ways.
• Where possible: Keep it Simple.
• You will get frustrated at times. Breath deep, we are all in this together!
Content Authoring

The least you need to know. Information on creating new and managing existing “content.”

- Creating a “Basic Page”
- Formatting with the Rich Text Editor
  - Standard “Body” and Summary Field
  - Images:
    - Inline – Adding from remote, local sources.
    - Floating (img-left, img-right)
    - Linking
      - An aside about “nodes” and Node IDs
- Text Formats and Allowed HTML /admin/config/content/ckeditor
  - Configuring Filtered Text vs Full HTML
    - Editor Appearance
    - Disable Enhanced Image Plugin and enabling others
    - Cleanup and Output
      - Remove options from Font Formats
    - File Browser Settings
      - IMCE
    - CSS
      - Editor CSS: Use theme CSS.
    - File Browser Settings
      - File Browser Type: CKFinder
- Accessibility of text and images
- Menu Settings
- Revisions
- URL Path Settings
- Authoring Information
- Publishing Options
- Saving / Previewing / Deleting
Info on Content Strategy

There is a large amount of literature about how people read on the web. Good practices will also have positive impacts on accessibility as well. A Google search for “Content strategy” is highly suggested. See also: https://alistapart.com/topic/content-strategy, https://www.nngroup.com/topic/content-strategy/

Here are some basic guidelines to keep in mind:

1. Users will scan your text. Get to the point. Most important info at the top of the page.
2. Break content into sections, divided by headings. Make sure headings form and outline (don’t skip heading levels), just like you learned in Jr. High.
3. Use short sentences.
4. Make paragraphs short, front load important info to the first few words of each.
5. Employ bulleted lists with a limited # of options often.
6. Use active voice, and drop jargon.
7. Use formatting sparingly to make your point.
8. Simplify text formatting and use special colors and formatting options sparingly. Consider how such things will age, or conform to brand.
9. You are in charge of your links. If they break, it looks bad.
10. Audit your content often.

Managing Media

All about file uploads. There are various other ways to do this with more advanced configuration, but these are the out of the box methods of the UNT Drupal installs.

- Adding an Image and media, multiple ways
  - Admin Bar - Workbench
  - Admin Bar - Content - Files
- Viewing Existing Media, multiple ways.
- Already Covered: Browsing Server from Rich Text Editor
Blocks

Blocks aren’t ‘content’, but they are useful. They can come in various flavors from static text, to automatic lists. They are configurable in several ways.

- Adding a simple text block
- Demonstrate Block Regions
- Assigning to a region
  - Left/Right/Highlighted are good examples
- Going Title-less
- Rules for display: only on certain pages, etc.

Menus

By Default, there’s one at the top of the site, but maybe you want more, and in different locations. Here’s how.

- Creating a New Menu
- Adding Menu Items
- Ordering Menu Items
- Editing/Enabling/Disabling/Deleting Items
- Assigning our Menu to a block region
- Editing Region Menu via Contextual Links
Organizing Content with Content Types/Nodes and Taxonomies

Drupal is most powerful when you employ the relational database to structure your content. If your site is small, or frequently not updated, you probably don’t need to consider all of these features, but if you will be creating a lot of content, or think that you will have the same information on multiple pages, and you want to minimize your work, or if you just want a really structured form for entering data that leaves fewer things to question, then you should consider creating a few content types and employing the “taxonomy” system.

Note: If you employ these techniques you will need to become versed in topics related to content layout management, and views, both of which are out of scope for the time we have in this class.

Why are we covering this in class then? Because you might have inherited a site with custom content types and taxonomies already built in.

1. For simplicity sake, when you create “content” you are usually creating a thing called a “node” according to Drupal.
2. A “node” is an object in the site’s database that can be accessed at a URL: /node/1, /node/2, etc. Every time you create a new piece of content, it is permanently assigned to a new ID#.
3. Nodes, or content types have attributes that are filled in using a form at:
   a. /node/add/some_type_name
   b. /node/ID#/edit
4. There can be different node/content types in a site.
5. All content types share a few basic settings that can be adjusted.
6. Each different type can have unique attributes/fields to fill in, and thus the different content types can serve different purposes.
7. The fields available to content types are re-usable. If more than one type could use an “image” field because it serves the same purpose in both objects, you can save some resources by sharing it between the types. Some customization is allowed when employed on the different object types (one form might say ‘photo’ the other might say ‘image’) but some settings/rules (all images must be 500px wide) will be universal to all types that use it.

The “Basic Page” content type

- Remember our new Menu? Adding content to it from the Node Edit Form.
- Needs to be added to the configuration for the content type at: admin/structure/types/manage/page
- Review the settings. These are customizable to all node types
Custom Types & Taxonomies

Don’t actually do this on your site now. You want to really plan things out before considering this!

Scenario 1: Your dean wants you to build a staff directory on the site.
- You have 20+ employees.
- Each person should have their own web page
- Each person shares some attributes, like a “name” or “office”
- There should be a main directory that shows an overview of all the staff.

The “person” content type.

- What are the attributes of “A person” and how would you map them to form fields.
  - First Name, Last Name, Bio, Photo, CV, Phone, Email, etc.
  - Should I rely on a local copy, or link to an external source (CV)
- Are the attributes singular, or repeating? Ex: First name vs Social Media Accounts.
- What fields are required?

Aside - Managing Similar Content with Taxonomies

Sometimes you will have content that you want to categorize. Like you want to group all content by a controlled vocabulary or a set of keywords. This can be useful for large sites, or when you have a long history of content on a variety of subjects and you want the user to be able to filter the list, or see only a sub-set of the content available.

Admin Menu – Structure – Taxonomy
Path: /admin/structure/taxonomy

- Add a Vocabulary
- Add Terms (for controlled lists), leave it blank for free-tagging
- List Terms and Re-order lists.
- Caveats/Problems
  - Duplicates & Case-Sensitivity

Example: Adding a “location” taxonomy.
Return to – Content Types

Scenario 2: You want to start advertising newsy things on the site.

- You’ll be creating new items every week or two
- You want to automatically archive old items into a list
- You want to be able to categorize news items into one or more of a few buckets for archival purposes.

The “announcement” content type and the “news categories” taxonomy.

- Same sorts of questions apply. What are the fields
- Note: This example uses two of our taxonomies
- Example: Different Node Form Display via Form Groups in Vertical Tabs

Scenario 3: You figure out that events are a special/different kind of news item and need their own fields and workflow:

- Events should have associated dates and locations
- Event Lists should be different that News Lists
- Events lists should show “upcoming” things, or be capable of doing calendar displays.

The “event” content type and the “event categories” taxonomy.

- Same sorts of organizational schemes apply
- Can we “re-use” existing fields like image, media, taxonomies, etc? Yes.
- Uses our specified taxonomies
- Events are location & Time sensitive. Note special Field
  o Example: Add location field and re-order in form.

Fields on Things other than “Content”

Fields, or attributes are most often associated with standard content items, but they are not limited to these:

- Possible to add fields to Taxonomy terms
- Add fields to files
Displays of Custom Content Types

Custom content types are useful, but unless you are inheriting a site with some already in place, you are going to have to do some extra work to get them to display correctly. The following topics are required to make much use out of them:

- “Manage Display” Settings of content types
- Minimum: Views Module for lists or other advanced displays of selected fields. Can take arguments from the URL, or from arbitrary parameters you set in the UI. Almost all work for views can be done through the drupal UI, but some advanced features require filesystem access and knowledge of PHP (though you can do a ton without this knowledge)
- Display Modules: Display Suite, Panels, or other modules that allow you to order/rewrite the associated markup of the content type using the drupal web interface. (not in default installs)
- Theming: Advanced Knowledge of PHP/HTML and access to the themes directory of your site.

A Few Non-Content Administration Screen of Note

These screens are ones you may have to visit now and again, or maybe just once and are fairly basic, but important for new drupal site managers. They may/may-not be content related.

Admin Bar - Configuration – System – Site Information
Path: /admin/config/system/site-information

- Controls Site Name, Admin Email, Footer Info, Social Media Info

Admin Bar – Appearance – Settings – UNT Foundation
Path: /admin/appearance/settings/unt_foundation

- Create a Google CSE at https://cse.google.com
- Search Settings Tab: check the box and add the provided ID from google.

Final Words & Suggestions

1. Attend several follow-up classes to this one. Do the online tutorials from linda.com and other sources.
2. Don’t expect to understand how Drupal/your site works quickly.
3. Take regular time daily/weekly to work with your website. This info is easily confused/lost. Practice often.
4. Audit your content regularly.
5. Have a backup person who can help do simple tasks, particularly for times when you want to go on vacation, are sick, etc.
6. Set your boss’s expectations about what is possible and what is not. Given a task to do, make a good faith estimate about time to delivery, and add 20-60% more depending on your experience level.

7. Don't be afraid to jump onto the discussion boards/help systems. There are experienced people who can give advice or help.