Drupal 7 Manual

Omega Theme:

www.nwu.ac.za

distance.nwu.ac.za

news.nwu.ac.za

IT Training & Empowerment

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Drupal 7 Manual: Omega theme

1. Take note

- Remember this url to log in with: http://www.nwu.ac.za/user/login
- Always use **Mozilla Firefox or Google Chrome** as browser when creating or editing in Drupal. If this browser is not available on your workstation, please log an IT-Help and request the Firefox version as used for Share.
- **Never** upload documents in **Word** format. Save the document to PDF first.
- Keep images to below 1MB filesize.
- Try to upload images in png format rather than jpeg.
- There must be no spaces in filenames when uploading documents or images to Drupal, for example:
  - **test image.png** should rather be **test-image.png** or **testimage.png**

Contact the Web Office any time:
WebOffice@nwu.ac.za

2. How to login

Open your Firefox browser and type http://www.nwu.ac.za/user/login in die address line to open Drupal. Login with your NWU staff number and network password. (We recommend that you bookmark this page)

After successful login, the following screen (with the black *Administration* toolbar at the top of the Drupal window) will appear.

3. Starting a page

3.1. Create a new page

- Log in to Drupal (see *section 2*)
- Go to **Content**> **Add content**
- Choose *Information About*
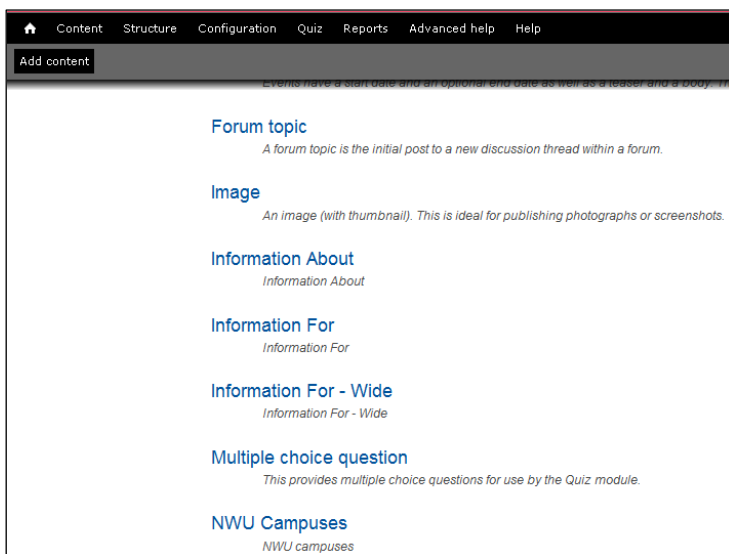
- Continue with page set-up (see the next section).

3.2. Page set-up

The page set-up is very important, as it will determine your page ranking, language settings, which business unit the page will fall under (important for navigation) and more. It is also very easy!

You will need to complete the following fields:

- Title
- Body (**do the rest of the set-ups first, then return to body**)
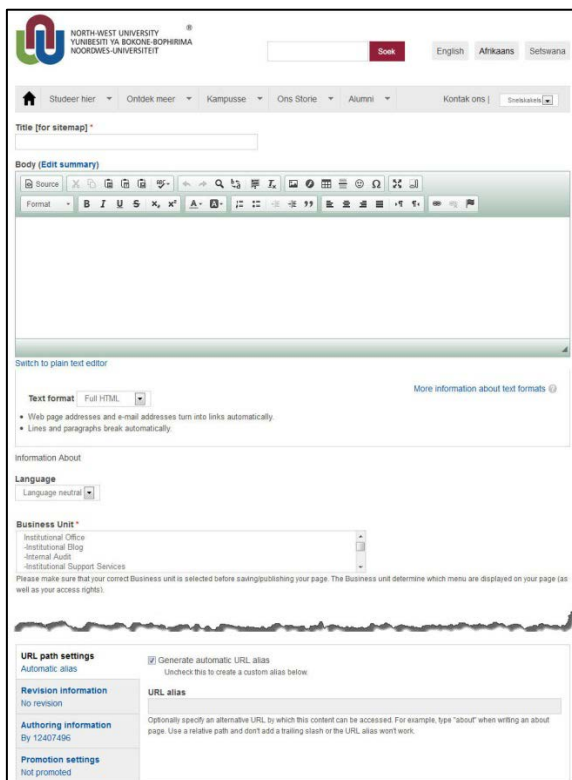- Language (start with English. Once your page is complete, there is a translate option to create the Afrikaans and Setswana equivalents).
- URL path settings (This will be your web address)
- Meta tags (important for search engine optimisation and page ranking)

3.2.1. Title [for sitemap]:*

a) Home page

If the page you are creating is the first page (home page) of your new site, use only the name of your department. The NWU name will be added automatically. An example is:

You type:

Research Support

Your web page visitors will see the following:
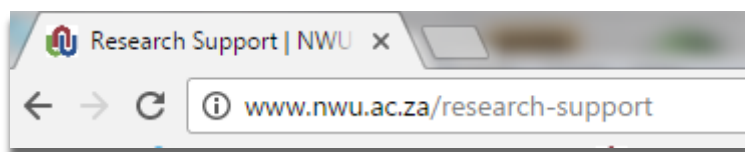
b) Secondary pages

If the page you are creating is a secondary page, the order changes somewhat. Now write page topic, then your business unit. The NWU name will once again be added automatically. You type for example:

Contact	Research Support

Tip: *Google cuts the page title after 70 characters remember to keep the limitation in mind. You can use acronyms provided it is the recognised name of your department (e.g. CTexT instead of Centre for Text Technology).*

3.2.2. Language

Choose the relevant language (<u>do not</u> choose Language neutral). We recommend that you start with English. Once your page has been set up, there is a translate option to create Afrikaans and Setswana versions of the same page.

3.2.3. Business Unit*

Click the drop-down menu and select your Business Unit from the list displayed.
Please **make sure** that you have chosen the right Business Unit before saving or publishing your page.

Business Unit *	Institutional Office ▼
	Please make sure that your correct Business unit is selected before saving/publishing your page. The Business unit determine which menu are displayed on your page (as well as your access rights).

3.2.4. URL path settings

The page URL is the "address" that people see when the page is listed in search engine results:

CTexT | Potchefstroom Campus | North-West University
www.nwu.ac.za/**ctext**/ ▼
The Centre for Text Technology (**CTexT**) is a research and development centre in the field of human language technology, specialising in text technology ...

Go to URL path settings to create a custom URL:

Menu settings
Not in menu

☐ Generate automatic URL alias
Uncheck this to create a custom alias below. Configure URL alias patterns.

URL path settings
Alias: ctext/index

URL alias

ctext/index

Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.

URL redirects
No redirects

- "Generate automatic URL alias **should not** be ticked
- Anything you add in the field will automatically be added to the NWU domain URL, for example:

  You type:
ctext

  The URL that will be created will be:
  www.nwu.ac.za/ctext

  Similarly, if you type:
 | ctext/staff |
  |---|

  The URL will be:
  www.nwu.ac.za/ctext/staff

- If you are creating a home page, only type the name of your department or business unit. It should be as short as possible, but should also still make sense to the user. If you have an acronym, use only that, e.g. www.nwu.ac.za/trade

- For secondary pages, do the above, but add the subject of the page, e.g: trade/vision-and-mission. The URL will then be www.nwu.ac.za/trade/vision-and-mission

*IMPORTANT: use only lower case for URL path settings, and put "-" between words where necessary. **There must be no spaces!***
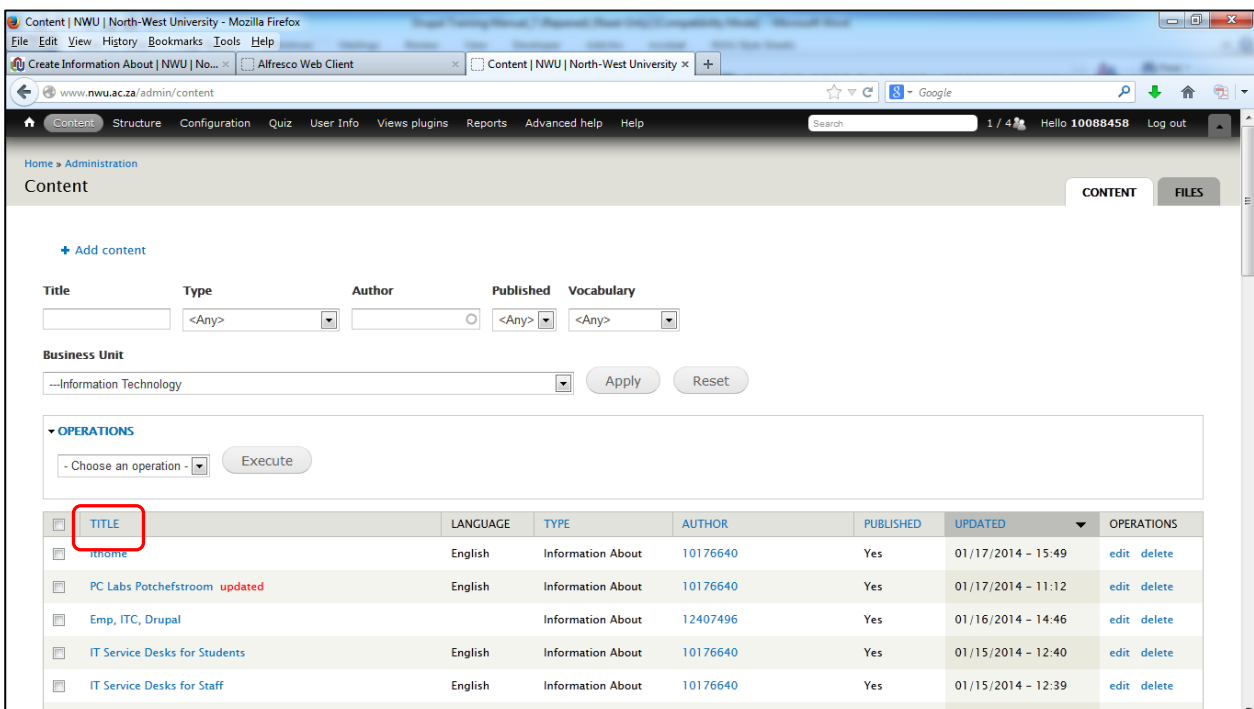
4. Editing an existing page

4.1. Method 1 (Selecting a Business Unit)

- Log in to Drupal by going to www.nwu.ac.za/user/login
- Click on **Content**
- Select the relevant **Business Unit** from the given drop-down list
- Click on **Apply**
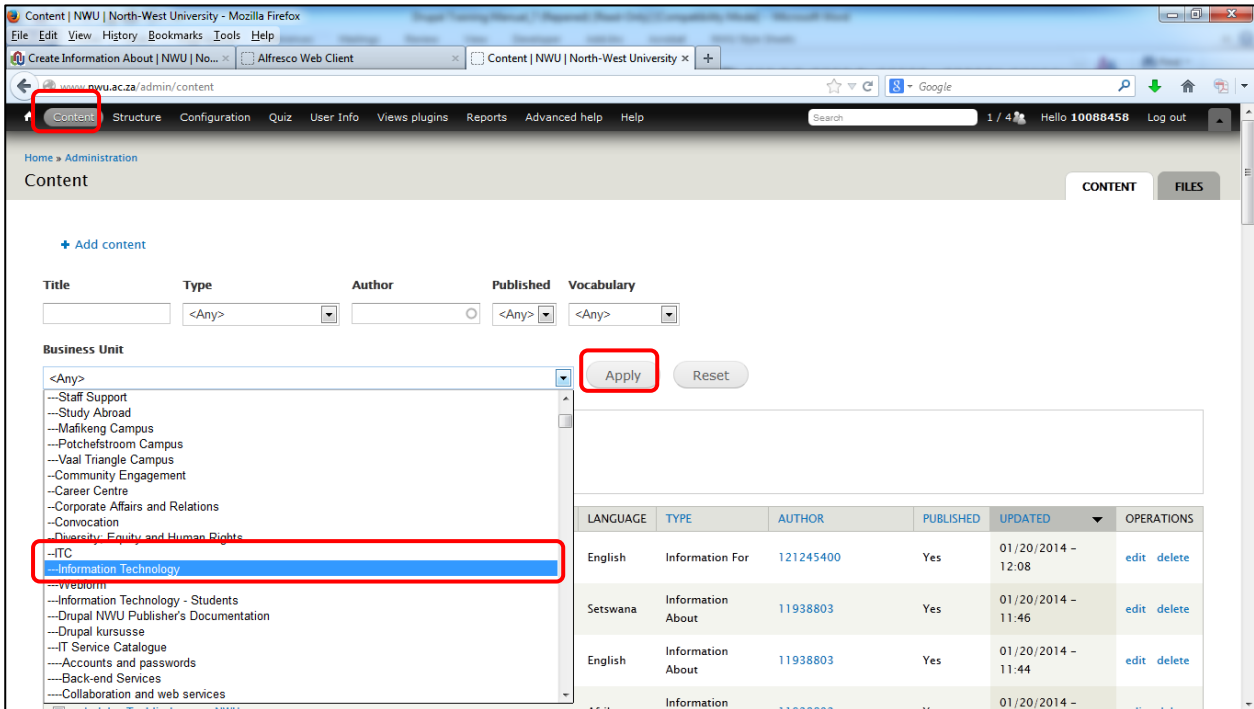
- A list of all the pages within that business unit will appear:

- To list these pages in alphabetical order, click on **Title** to sort the list.
- Find the relevant page and click on **edit** (in the operations column).

- You will now be in the editing page (*see section 5*)

4.2. Method 2 (navigating via home page)

- Log in to Drupal by going to www.nwu.ac.za/user/login
- Click on the home icon in the upper right corner
- Navigate to your page (the same way you would if you were a user visiting the home page)
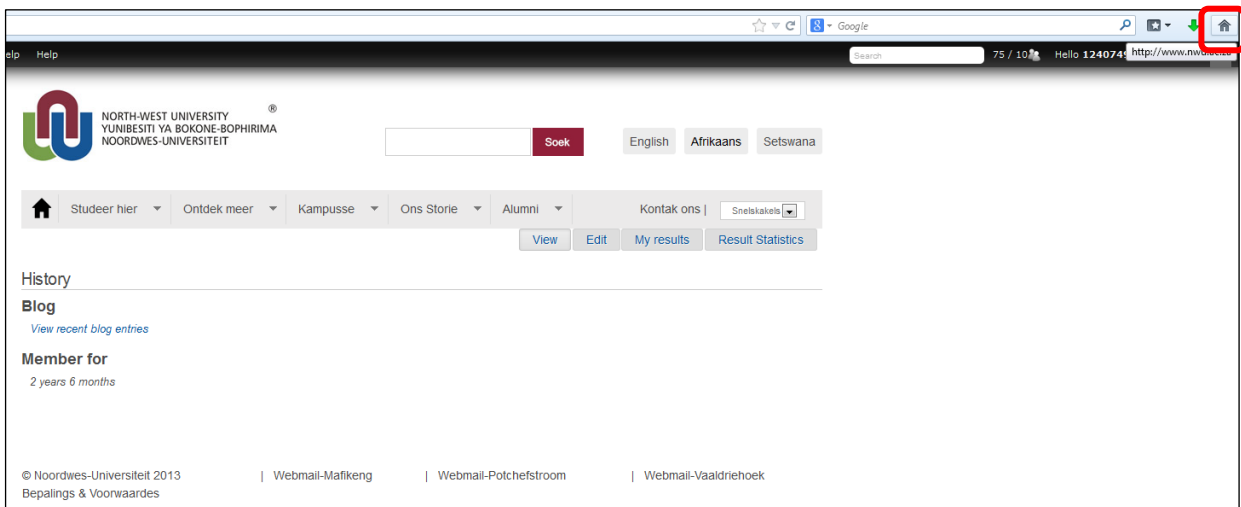
- You will see several tabs. Select the **edit** tab. If you cannot see the tab, you either did not log in correctly, or you do not have permission to edit this page. Contact the Web Office for assistance.
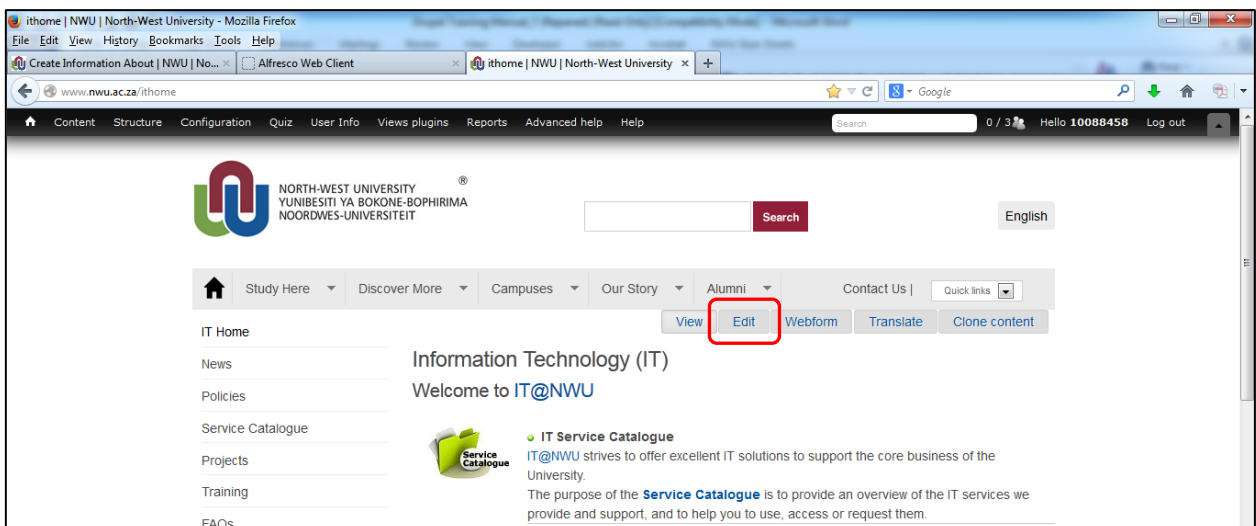
4.3. Method 3 (using page URL)

- Log in to Drupal by going to www.nwu.ac.za/user/login
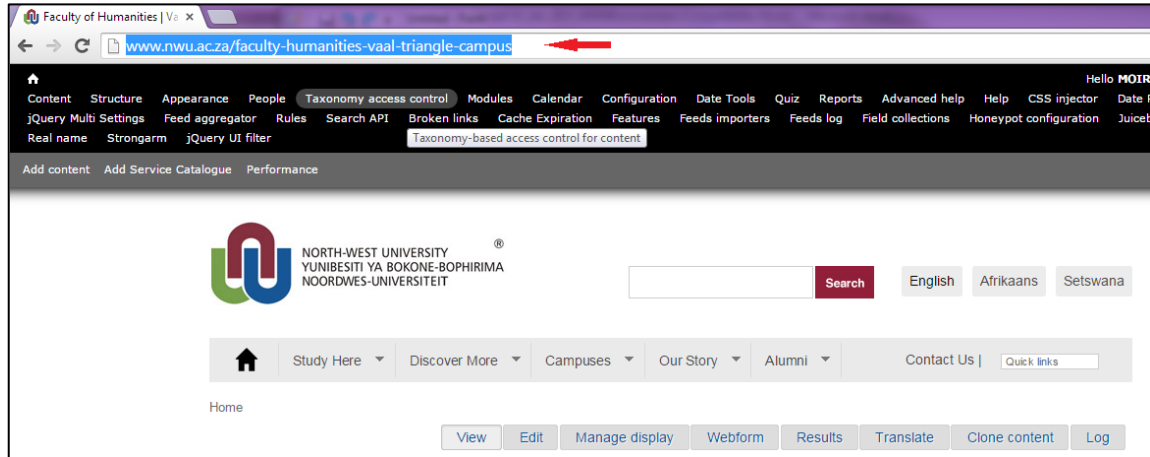- Insert page URL in browser address bar
- Enter

- You will see several tabs. Select the **edit** tab. If you cannot see the tab, you either did not log in correctly, or you do not have permission to edit this page. Contact the Web Office for assistance.
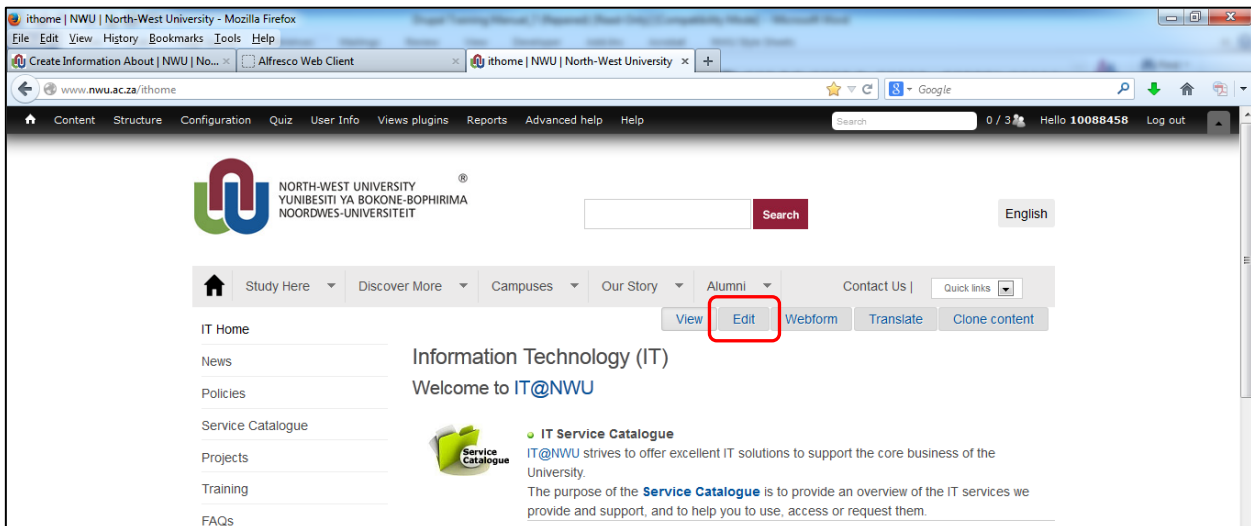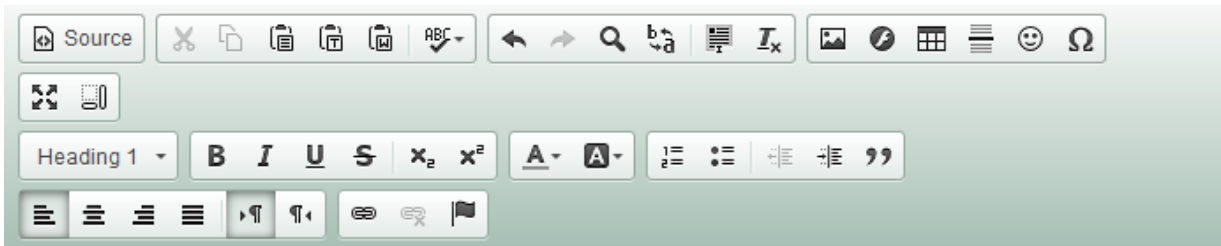

- You will now be in the editing page (*see section 5*)

5. Editing page

- You should now be on the editing page
- Ensure that all pre-sets are completed (see section 3)
- Go to the "Body" area
- Familiarise yourself with the toolbar
- Insert your headings
- Start adding content

5.1. Toolbar

|	
Source	Source: to edit the html source code
Cut, Paste icons	Cut, Paste
Paste icons	Paste, Paste as plain text, Paste from Word
Undo, Redo icons	Undo, Redo
Find, Replace icons	Find, Replace
Image icon	Image: to insert a picture
Flash icon	Flash: to insert flash content
Table icon	Table: to insert a table
Horizontal line icon	Insert Horizontal Line
Ω	Insert Special Character
Maximize icon	Maximize: to enlarge the editor to full page size
Show blocks icon	Show Blocks: to show paragraph blocks
Heading 1	Paragraph Format: NWU Web Template styles
B I U S x₂ x² A A	For font formatting
Paragraph formatting icons	For paragraph formatting
Link, unlink icons	Link, unlink
Anchor icon	Anchor: to add an anchor

5.2. Headings

Correct use of headings is very important, not only to orientate readers, but also for search engine optimisation. All NWU pages use styles that were pre-set as part of the NWU's theme in Drupal 7 (Search engines prioritise text that was given the Heading 1 styles for example).
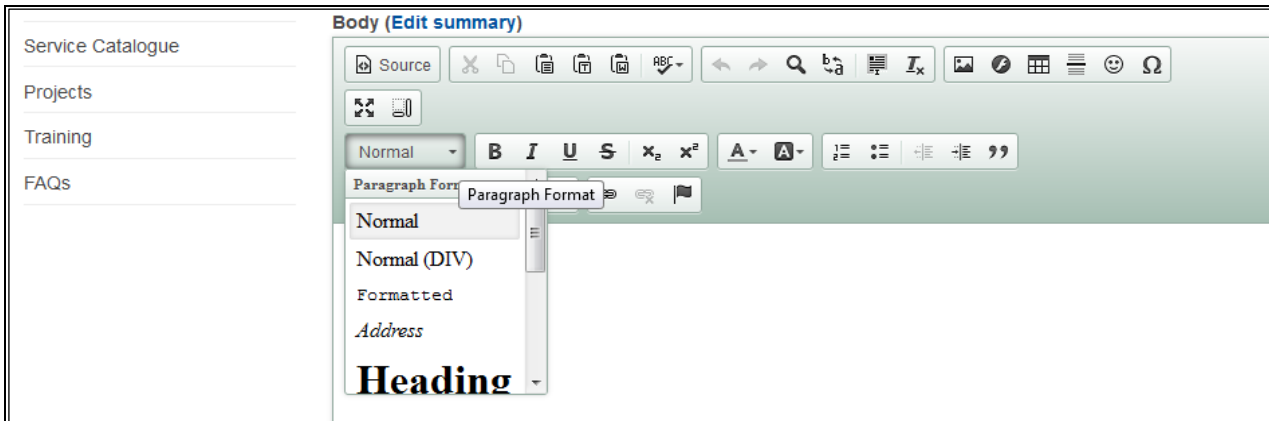
We recommend the following format in the interest of standardisation:
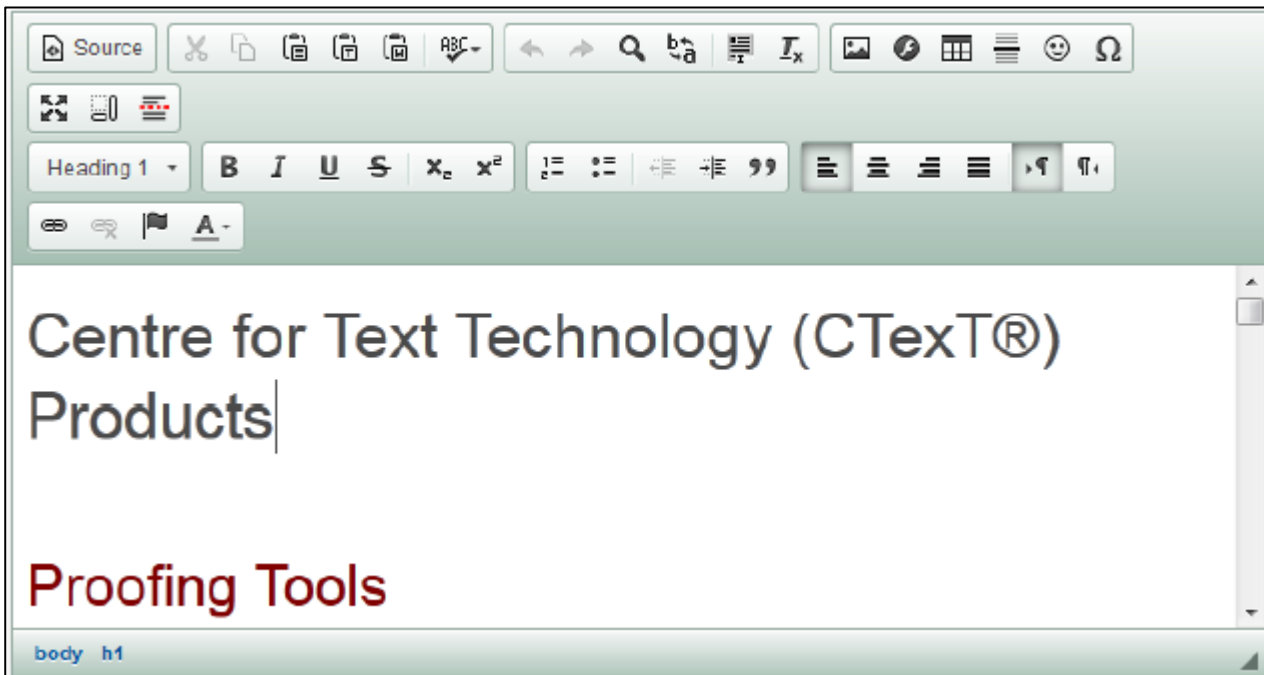
5.2.1. Your business unit home page

- o Heading 1: Faculty name
- o Heading 1 (new line): Business unit
- o Heading 2: Topic
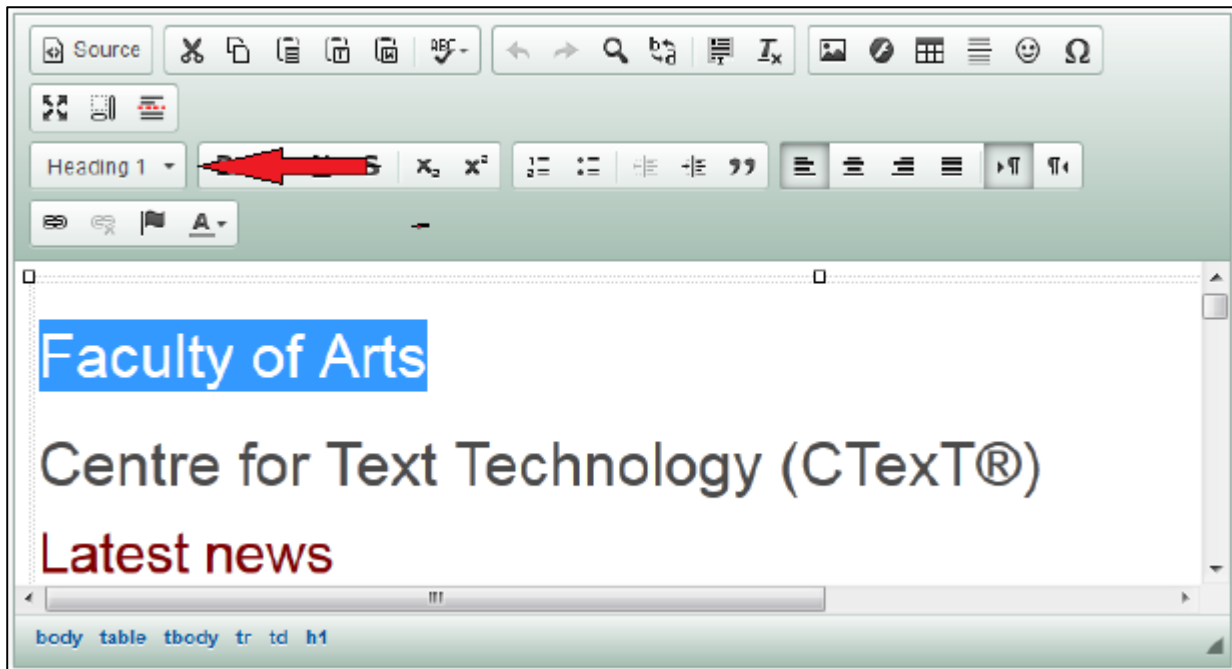
Font colours may be changed, provided it adheres to the NWU corporate identity.

5.2.2. Secondary pages

- o Heading 1: Business Unit
- o Heading 1: Topic
- o Heading 2: Sub-topics

5.2.3. Banners

There is an option to use banners instead of text headings. Banners, while visually more attractive, do however involve more careful set-up to ensure SEO. The following has to be set in the picture properties:

- Alternative text (shows up when browsers do not show pictures. Also important for programmes that make use of speech technology when users can't see the screen).

- Width and height must both be set at 100%. This ensures scalability for users who use different devices (e.g mobile screens). It will however not work if the banner is not designed in the right size.

- Contact Graphikos, your marketing department or the Institutional Web Office for assistance!

- Example:
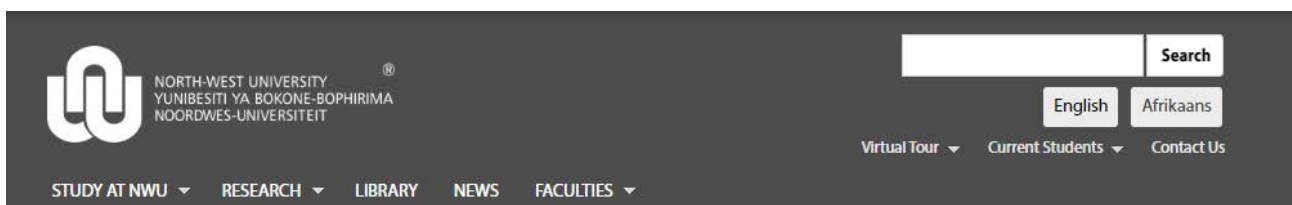
5.3. Adding content

5.3.1. Uploading files

IMPORTANT: In order to be able to link to a document for example, the document (file) must first be uploaded onto the Drupal server. Make sure that your filename contains no spaces as this will result in error messages in on your editing page. Replace spaces with hyphens (e.g. test-document.pdf). The filename should also make sense and act as a type of description of the document (e.g.NWUAnnualReport.pdf). This will benefit SEO

- Assuming you are logged in on Drupal, go to **Content** > **Files**
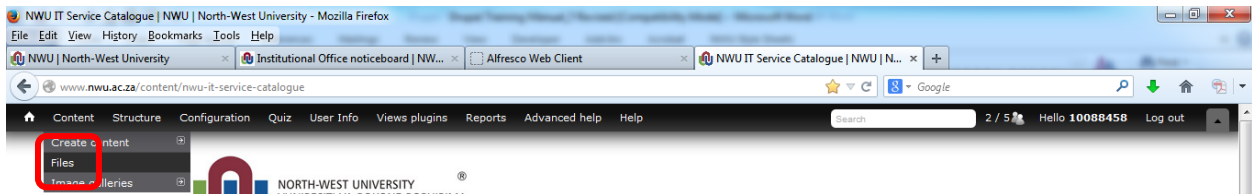
- The file browser window, displaying all the business units in alphabetical order, will appear.
- Navigate to your business unit and choose (or create) a folder to store your documents in.
- Click on the "upload files" icon

- Click on **Browse** so find the file on your computer hard drive. Multiple uploads are possible. Just browse to each file you want to upload.
- Click on **Ok**.
- The file(s) are now uploaded onto the Drupal server, and are ready to be linked to (see section 5.3.2).
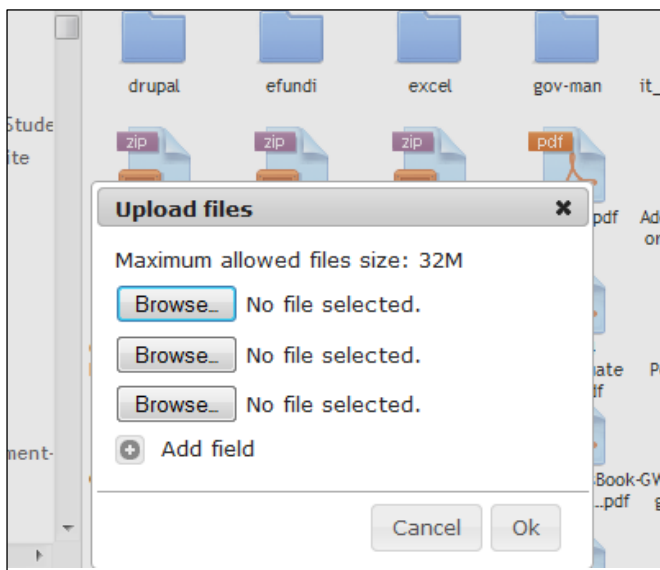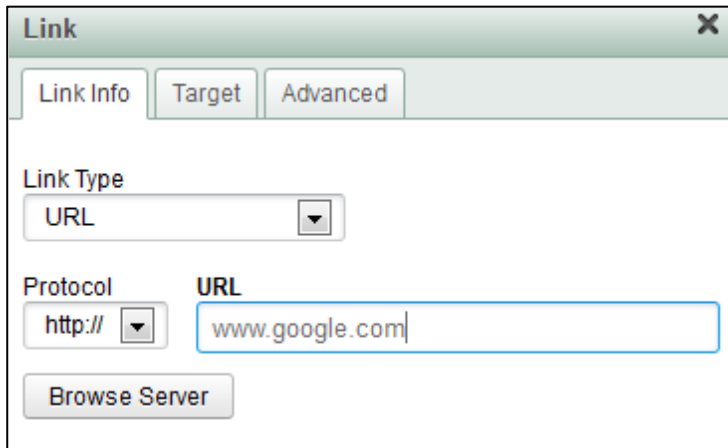

IMPORTANT: If you upload a file/document in a folder, and a file/document already exists within that same folder with the same name, the newer version will automatically overwrite the old version
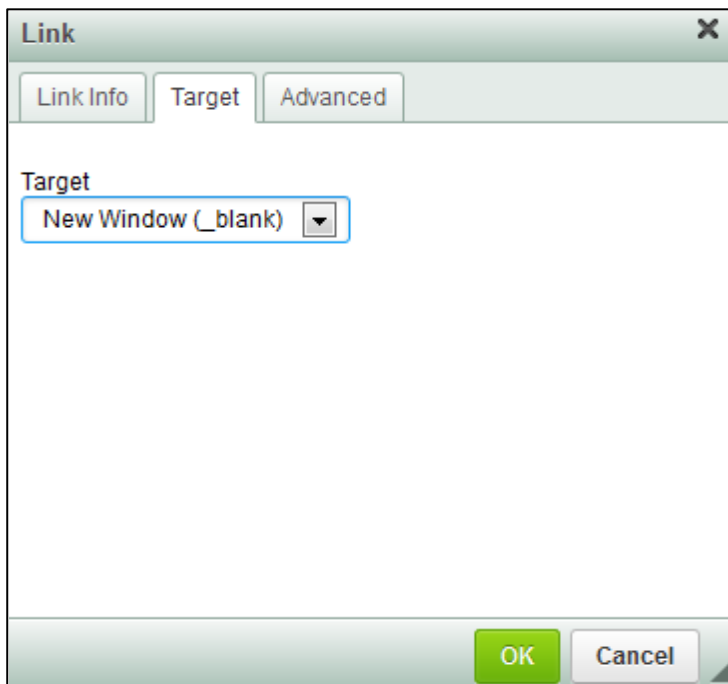
5.3.2. Hyperlinks

5.3.2.1. Linking to a website

- You should now be in the *body* window on the *editing page*.
- Highlight the text that has to link to a website

- Click on the link button ⬛ and the *Link* dialogue box will open up.
- Choose *Link Type* **URL** and insert the page URL that you want to link to in the URL field

- Now navigate to the *Target* tab and select **New Window (_blank)**. Click on **OK.**

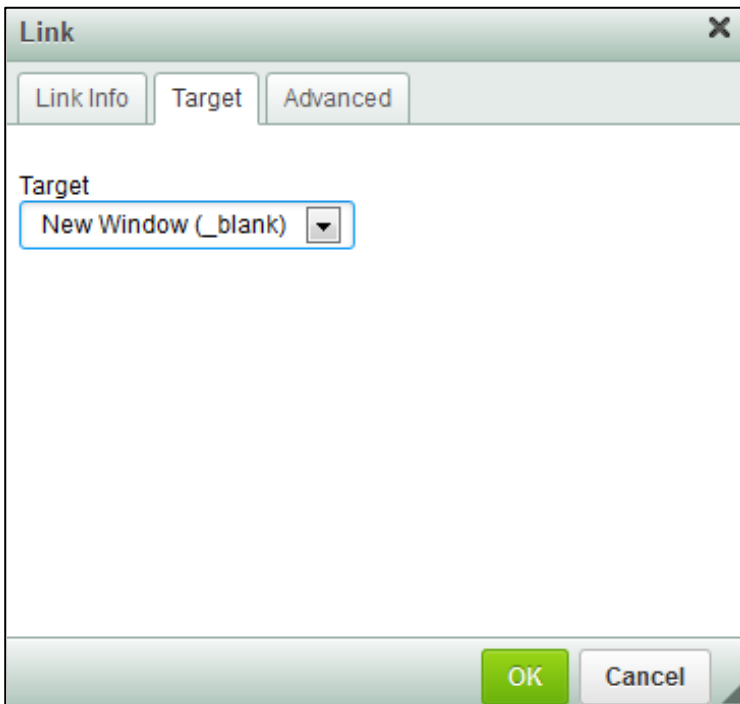#### 5.3.2.2. Linking to another Drupal page on the NWU domain

- You should now be in the *body* window on the *editing page*.
- Highlight the text that has to link to the Durpal page.
- Click on the link button ⬛ and the *Link* dialogue box will open up.
- Choose *Link Type* **URL** and insert the URL of the page that you want to link to (copy the URL when you visit the page in your browser).
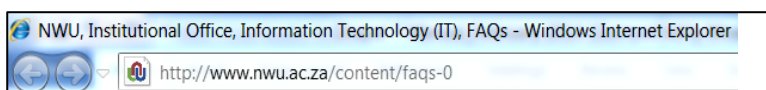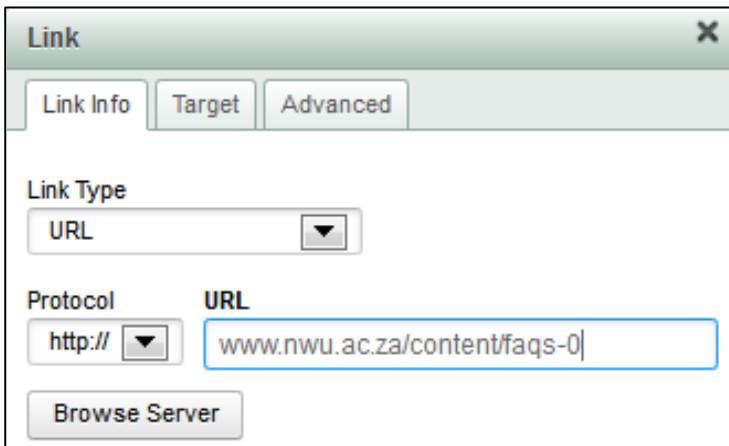
- Now navigate to the *Target* tab and select **New Window (_blank)**. Click on **OK.**

5.3.2.3. Linking to a document

IMPORTANT: Linking to a document can only occur once the document has been uploaded (see section 5.3.1). This example will be based on linking to a document that had already been uploaded.

- You should now be in the *body* window on the *editing page.*
- Highlight the text that has to link to the document.
- Click on the link button   ⊜   and the *Link* dialogue box will open up.
- Choose *Link Type* **URL**
- Click on the **Browse Server** button
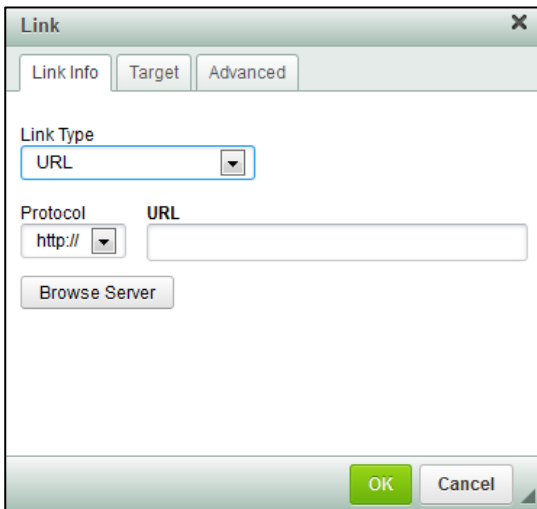
- The **File Browser** window will appear. Business units are displayed in alphabetical order.

- Scroll to and select the relevant business unit.
- Go the folder where your uploaded the document that you want to link to (see section 5.3.1).
- Right click on the document and choose **Select file**
- Now navigate to the *Target* tab and select **New Window (_blank)**. Click on **OK.**

5.3.2.4.   Linking to an e-mail address

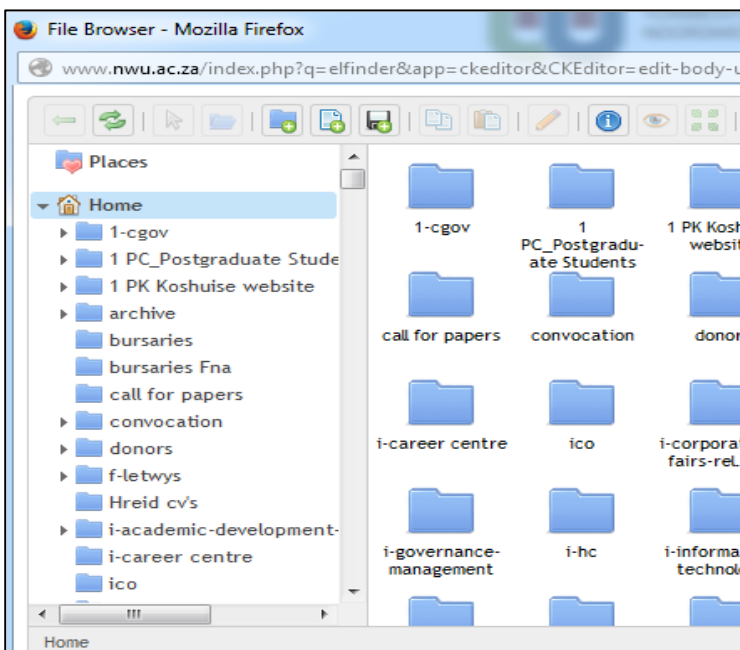*A so-called "mailto" link allows the user to send an e-mail when clicking on it.*

- You should now be in the *body* window on the *editing page.*
- Highlight the text that has to link to the e-mail address.
- Click on the link button   and the *Link* dialogue box will open up.
- Choose *Link Type* **E-mail**

- Type (or paste) the relevant e-mail address in the *E-Mail Address* field.
- You have the option to create a customised subject and message to accompany the e-mail automatically. This is however not compulsory.
- Click on **OK.**

5.3.2.5. Linking to an anchor

Anchors allow you to link to a specific <u>place</u> within the same webpage by creating an anchor link.

Inserting an anchor

- You should now be in the *body* window on the *editing page*.
- Highlight the text (or put the cursor right before it) that has to link to be an anchor.
- Click on the anchor button 🏳 and the *anchor* dialogue box will open up.
- Type in any name for your anchor that will make sense to you, provided it is only one word or is hyphenated where more than one word is needed (**there can be no spaces in the name!**)
- You will now have an anchor to link to.

Linking to the anchor

- You should now be in the *body* window on the *editing page*.
- Highlight the text that has to link to be an anchor.
- Click on the link button 🔗 and the *Link* dialogue box will open up.
- Choose *Link Type* **Link to anchor in the text**
- Click on the anchor name that you created.

5.3.3. Images

IMPORTANT: *When uploading your image onto the Drupal server (using the same steps you would when uploading a document – see section 5.3.1), ensure that it is as close to the right size as possible and not bigger than 1MB. Resizing the image in Drupal may cause distortion. It also just resizes the image without reducing the filesize (space the image will take up in the server).*

Preferrably use ***PNG*** *formats.*

5.3.3.1.   Resizing images before uploading them to Drupal

You may use any photo-editing software (such as Adobe Photoshop) to edit your photos. The below example makes use of Windows Paint (a default programme included in most versions of Windows).
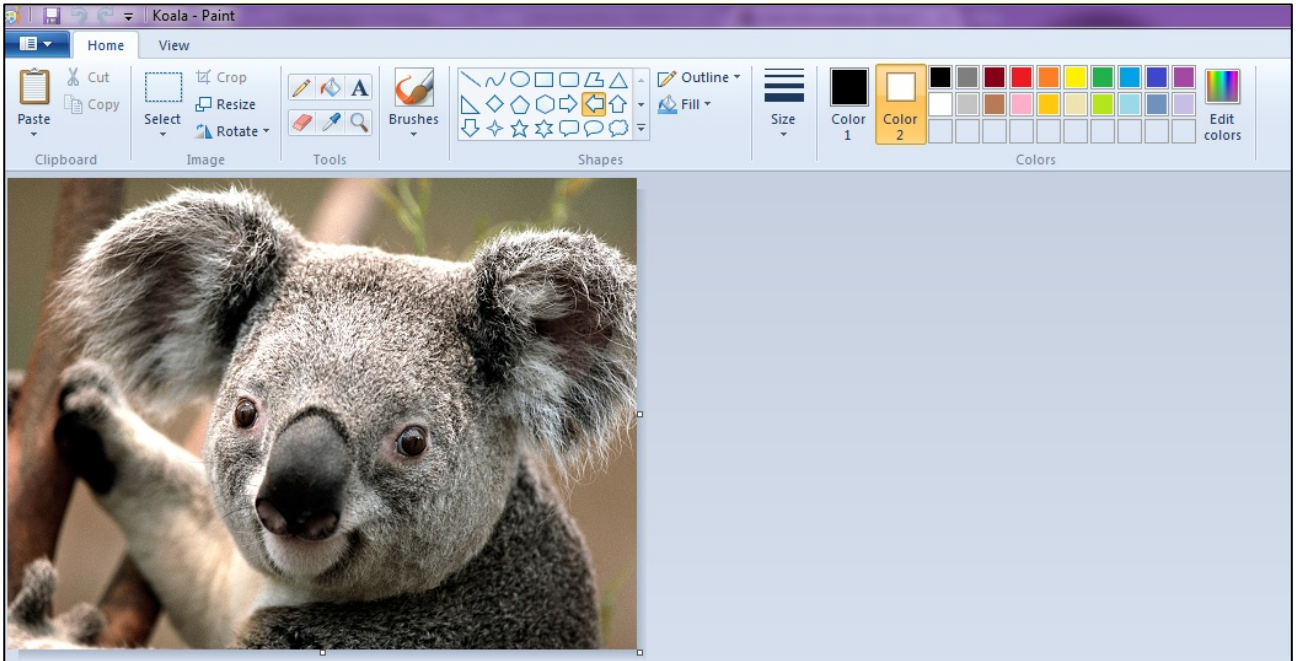
- Go to the Windows start button on the bottom left side of your screen and select **Paint**
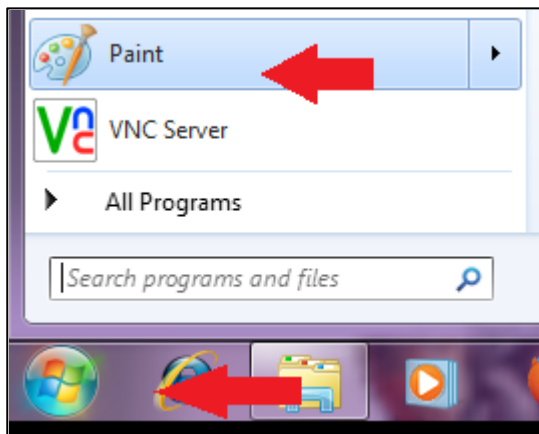
- You will now be in the *Paint* programme
- Click on the *File* icon and select **Open**
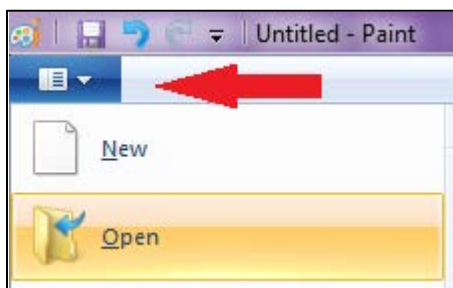
- Click on the *File* icon and select **Open**
- Navigate to the image you want and open it

The image now has to be resized. **Do not** upload the image to Drupal before the image is roughly the right size. Resizing directly in Drupal, will change the image measurements, but the file size (the space the image will take up on the Drupal server) will remain the same, thus wasting precious memory. There are two ways to resize in *Paint*:

- **You want to make the image smaller but do not have exact measurements:**

  o Go to *Home>Resize*
  o Choose the *Percentage* option
  o Make sure that *Maintain aspect ratio* is ticked
  o Enter *Horizontal* and *Vertical* percentages. This indicates the percentage by which the image will be made smaller. If you insert 25 for example (it will automatically be the same for both because you have chosen to maintain aspect ratio...meaning it will resize proportionally), it means that your image will be resized to 25% of its current size. Similarly, had you inserted 50%, both the width and height would have been halved.
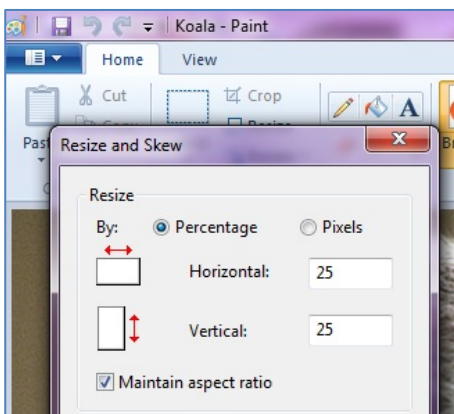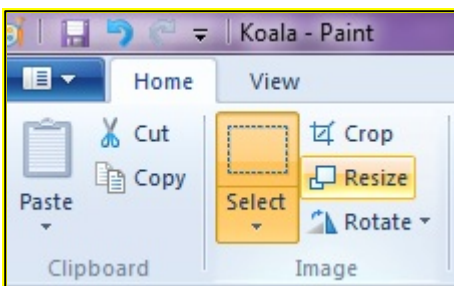
- **You have the exact size that your image should be in pixels**

An example is when you know the photo you should upload with your news article should be at least 600 pixels wide.

     o Go to *Home>Resize*
     o Choose the *Pixels* option
     o Make sure that *Maintain aspect ratio* is ticked
     o Here you need only enter one pixel value (e.g. 600 horizontal). Because you have chosen to maintain aspect ratio, the vertical pixel value will automatically adjust to the new horizontal value, while maintaining the image proportions. If you do not maintain aspect ratio, distortion of the image could take place.
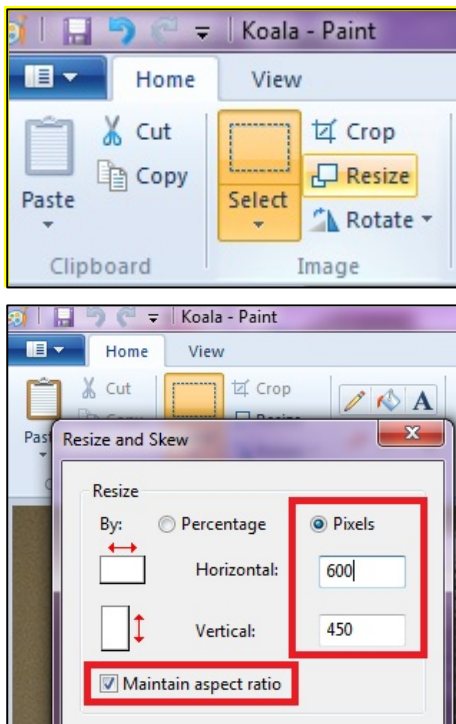
- Go to *File>Save as>PNG picture* to save the image in PNG format on your computer. We recommend this format for all web images.

Your image is now ready to be uploaded to Drupal and to insert into your website.

5.3.3.2. Uploading images to Drupal

- You should now be in the *body* window on the *editing page*.
- Place the cursor where the image should appear on the web page.
- Click on the ▣ **Image** button. The **Image Properties** popup window will be displayed.
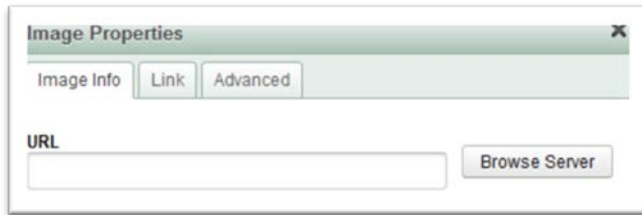

- Click on *Browse Server*
- The file browser window, displaying all the business units in alphabetical order, will appear.
- Navigate to your business unit and open.
- Find the file within your business unit that you wish to upload your image to (you can, for example, create a file called *Images* under your business unit. You can then upload all your images to this one central place).
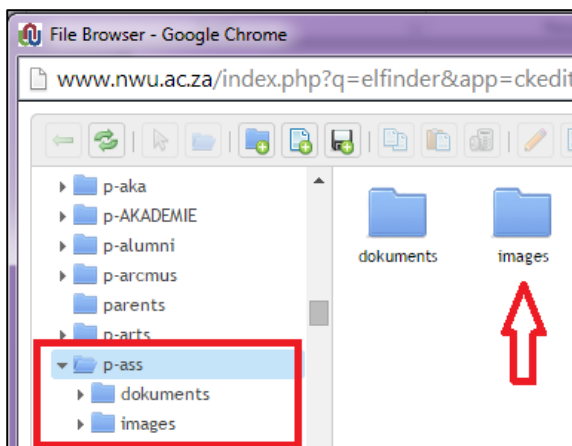
- Click on the *Upload files* icon
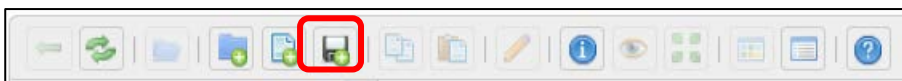
- Click on **Browse** so find the image on your computer hard drive. Multiple uploads are possible. Just browse to each file you want to upload.
- Click on **Ok**.
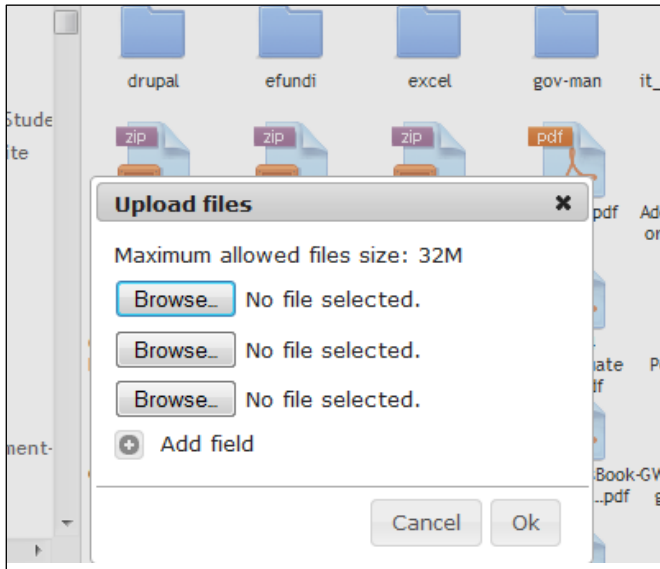
- The images are now uploaded onto the Drupal server, and are ready to be inserted into your webpage (see section 5.3.3.3).

IMPORTANT: If you upload an image in a folder, and an image already exists within that same folder with the same name, the newer version will automatically overwrite the old version

5.3.3.3.   Inserting an image in your website

- If you had followed the steps in section 5.3.3.2 correctly, you should now see the images that you have uploaded.
- Navigate to the image you wish to insert and double click
- The *Image properties* pop-up window will appear.
- If you followed the steps in section 5.3.3.1 correctly your image sizes will be correct, and you will not need to change that.
- You will, however, need to add *Alternative text*. Some users turn off image loading when using a modem or have a slow connection. Whatever you type in this field will then display instead, still informing the user what they would have seen, had the image displayed. It should therefore be quite descriptive.
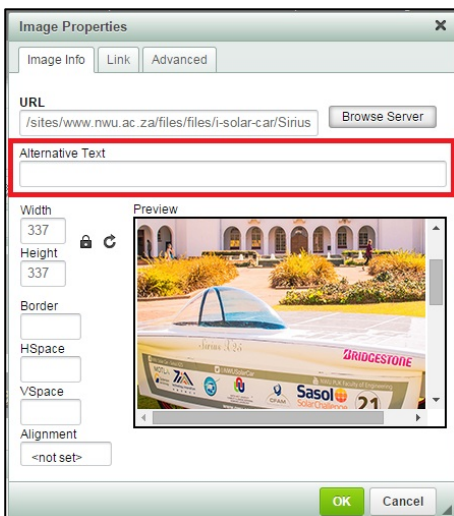
- Choose whether your image must align left, right or centre in the *Alignment* field.

- The *HSpace* (horisontal space) and *VSpace* (vertical space) fields refer to the space that will surround the image. Only insert values if you want "padding" around your image.
- The value that you insert in the *Border* will determine the thickness (if any) of the border around your image (where 1 is very thin and 5 is much thicker for example). If you want no border, simply leave the field blank or insert 0.

6. Multilingual pages and page translation

- Log in to Drupal by going to www.nwu.ac.za/user/login
- Insert page URL in browser address bar
- Enter

Edit the English page.

Click on the **Translate** option.

Click on the **add translation** button.

A copy of the English page will be made with the language automatically set to the language you chose to translate.

Modify the body of the page and save the page.