e-branch
in a box

November 2009

* The Most Current Version of this Guide can be found Online at libraries.idaho.gov/e-branch

Presented by the Idaho Commission for Libraries

Site URL:
http://_____________________.lili.org
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WEB PRESENCE: DEFINITION & CRITERIA

The Idaho Commission for Libraries defines Web Presence as a vital website that is an extension of the library providing information about or access to library services. A basic level of web presence for public libraries should meet the following criteria:

- Library Name
- Library address – both mailing address and street address, if different (includes branch information if applicable)
- Library phone number
- Online contact (email address or contact form)
- Hours of operation
- Library Board member names
- Link to the online catalog (if applicable)
- Link to the LiLI Portal
- Or, a link to the individual LiLI Databases and the LiLI Unlimited statewide catalog with the “funded by LiLI” icon/button
- Description of library services available to patrons
- Site content is current
GLOSSARY

**Accessibility** - Providing access to web resources for users of all abilities. Specifically, this is design that takes into account the needs of individuals with disabilities, such as impairments in vision.

**Aggregator** - In this context, software that collects newsfeeds for use in a web site. Related terms: blog, podcast, RSS, syndication.

**Blocks** - A Drupal term identifying chunks of content that can be place in designated areas of the website (e.g. left sidebar, right sidebar, Header, Footer).

**Blog** - An automated system for posting articles or announcements on a web site. Blog articles are usually accessed via a web page with a reverse-chronological listing of these articles, or via an RSS newsfeed. Related terms: aggregator, podcast, RSS, syndication.

**CAPTCHA** – Completely Automated Public Turing test to tell Computers and Humans Apart. CAPTCHA is used to help prevent computer programs (bots) from automatically running and adding accounts, spam messages, etc. from websites. A common CAPTCHA technique is to take a common word and make it all squiggly or put a line through it. Humans are still able to read the word, but computers have a hard time deciphering it because of the difficulties of programming a machine for optical character recognition.

**Content editor** - When editing a node it is the space in which text is entered and formatted. Using the content editor, the user can edit text, add graphics, create tables, and add hyperlinks to the content.

**Content management system (CMS)** - Software that allows users to create, update, and manage documents. In a web context, a CMS is software that lets a user with a web browser create web pages and manage a web site without having to deal with the technical aspects of web design.

**Database** - Software that warehouses data.

**Domain name** - The base of a URL. In http://www.example.com/this/is/a/url.html, example.com is the domain name. Related terms: URL.

**Drupal** - An open source content management system.

**Embed** - Placing a snippet of code, gadget or widget into a website to provide added functionality.
Gadget - A prebuilt piece of code that interacts with a third party website(s) to provide added functionality to a website. Sometimes referred to as a Widget.

Library 2.0 - A concept of interactive library service in the digital age that is loosely tied to Web 2.0. At current, it's still something of a buzzword that means different things depending on the speaker, but generally it denotes the goal of simple but ubiquitous access to library services and resources using technology.

Newsfeed - An automatically produced listing of blog or news headlines and excerpts. Related terms: blog, RSS, syndication

Node - A Drupal term referring to a page or the main piece of content. If you take away the headers, footers, and sidebars on a page, what is left is the node.

Open source - Community-developed and supported software. The development and support is usually facilitated by the Internet. Open source software is available for free in the sense that a kitten is free. It doesn't cost anything, but once you have it, it's your responsibility to care for it.

Parent/Child Relationships - These relationships are used for hierarchy purposes in the Drupal menu system. Parents are the top level items, and Children are items found one level below that.

Podcast - A blog presented in audio format. The term is a combination of the terms "iPod" and "broadcast." Note: An iPod is not necessary to playback podcasts. Related terms: aggregator, blog, RSS, syndication.

Region - Drupal themes are broken down into different regions: header, footer, left sidebar, right sidebar, and content. The header runs along the top of the page and usually contains the site logo and the site title. The footer runs along the bottom of the page and usually contains the library's address and phone number. The left and right sidebars usually run along the sides of the theme and contain the blocks. The content region typically contains the node.

RSS - Stands for Really Simple Syndication, which is a method for providing newsfeeds on the web. Related terms: aggregator, blog, podcast, syndication.

Sidebars - A Drupal term referring to the columns to the left and the right of the node, or central content area of a web page.

Skin – Can be thought of as a sub-theme. The general layout is the same, but the colors and background imagery is a little bit different. Related Terms: Theme.

Snippet - A small, reusable piece of code that adds additional functionality to a website

Syndication - In a web context, pulling the content from an RSS newsfeed into a web site. Related terms: aggregator, blog, podcast, RSS.
**Theme** - A Drupal term; it is the look, feel, and layout of a website.

**URL** - Stands for Uniform Resource Locator. A web site address, for example: http://www.example.com/this/is/a/url.html.

**Web 2.0** - A new way of thinking about the web which provides tools and functionality for publishing, collaboration, and information access that normally existed only in the realm of desktop computing with software packages like Microsoft Office. Sometimes called "web as platform."

**Widget** - A prebuilt piece of code that interacts with a third party website(s) to provide added functionality to a website. Sometimes referred to as a Gadget.
WRITING FOR THE WEB - TIPS

☐ Use hierarchy to structure relations among information units.

☐ Use bullet lists instead of paragraphs.

☐ Use concise and factual sentences.

☐ Proofread everything twice!

☐ Update your pages frequently.

☐ Make sure all links are hot!

☐ Provide useful, specific information.

☐ Use bold text sparingly and use italics for emphasis.

☐ Avoid using “smart quotes” and auto hyphens.

☐ Avoid jargon and use terminology familiar to the user.

Useful References

Writing for the Web by Jakob Nielson
http://www.sun.com/980713/webwriting/

Writing for the Web by Daniel Will-Harris

10 Tips for Good Web Writing by Jennifer Kyrnin
http://webdesign.about.com/od/writing/a/aa031405.htm
LOG IN

Step 1  Navigate to the URL for your e-branch site

Step 2  Click Login link
         *The link may have a different name if you have renamed it

Step 3  Enter Username and Password

Step 4  Click Log in
CHANGING PASSWORD AND UPDATING E-MAIL ADDRESS

Step 1  When viewing the default screen upon login, click edit to enter Edit Mode

<table>
<thead>
<tr>
<th>View</th>
<th>Edit</th>
<th>Track page visits</th>
<th>File browser</th>
</tr>
</thead>
</table>

User Info

Name
Demo Account

Title
Demo User

History

Member for
2 years 51 weeks

Blog
View recent blog entries

Step 2  Enter the email address you would like to use for public communication

E-mail address: *

demo@example.com

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.
Step 3  Enter your password in the **Password** text field and confirm it by entering in the password a second time in the **Confirm Password** text field

```
Password:

Confirm password:
```

To change the current user password, enter the new password in both fields.

Step 4  Option: Check the **Personal Contact Form** checkbox if you wish to allow logged in users to contact you or other staff members.

A description about what this is used for is listed on the page

```
Contact settings

☐ Personal contact form
Allow other users to contact you by e-mail via your personal contact form. Note that while your e-mail address is not made public to other members of the community, privileged users such as site administrators are able to contact you even if you choose not to enable this feature.
```

Step 5  Select the **Time Zone** for your library

```
Locale settings

Time zone:
Thursday, June 11, 2009 -11:40 AM -0800
Select your current local time. Dates and times throughout this site will be displayed using this time zone.
```

Step 6  Click **Save** at the bottom of the page to save the changes
UPDATE USER INFO

Step 1   Enter Edit Mode

Step 2   From the account page, click on User Info

Account information

E-mail address: *

demo@example.com

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password:

Confirm password:

To change the current user password, enter the new password in both fields.
Step 3  Enter your **Name, Title, and Phone Number**
All of this information is not publicly visible and is used primarily by the ICFL for site contact information

**User Info**

**Name:**
Demo Account
Your real name. The content of this field is kept private and will not be shown publicly.

**Title:**
Demo User
Your position or title. The content of this field is kept private and will not be shown publicly.

**Phone:**
Phone number where you can be reached during business hours. The content of this field is kept private and will not be shown publicly.

Step 4  Click **Save** at the bottom of the page to save the changes

<table>
<thead>
<tr>
<th>Save</th>
</tr>
</thead>
</table>
123 Easy St., Boise, ID 83702 | (208) 555-5555

Login
ENTEERING INTO EDIT MODE

Step 1  Login
If you have logged in previously, the administrator menu will be available to you.

Step 2  Either Create a New Page OR Edit an Existing Page
a. Creating New Pages
Create New Content by Navigating to Create Content and Selecting the Type of Content you want to Create

b. Editing Existing Pages
Navigate to the page you want to edit and click Edit

Step 3  Scroll down the page to the Body section to begin editing/adding content
ADDING/MODIFYING PAGE TITLES

Setting a page title in the e-Branch in a Box system is required because it uniquely identifies pages in list items, is used in internal searches, and optimizes your search results on external search engines such as Google, Bing, or Yahoo.

Step 1 Enter Edit Mode

Step 2 Enter text to describe the page in the Title text field
Note: Items with a red asterisk (*) indicate that the field is required

Title: *
About Us

Step 3 Click Save at the bottom of the page to save the changes
The Drupal system is heavily biased toward text and text manipulation. However, the ICFL realizes that e-Branch users will want to put images and colors into their sites to make them visually appealing. Since ICFL doesn't expect everybody to be HTML gurus, the e-Branch in a Box project uses the open-source, WYSIWYG, TinyMCE editor. This editor provides a Microsoft Word-like interface and automatically creates the underlying HTML code. One word of caution, WYSIWYG editors can be prone to error and are restrictive if you want to go beyond the use of text.

For users who find this interface cumbersome, it can be turned off. If you decide to go this route, the system will allow you to enter in plain text or HTML code into the body field. If you do not know HTML, the organization that writes the HTML standard, the World Wide Web Consortium, has free online tutorials (http://www.w3schools.com).
### BUTTON DESCRIPTIONS

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Bolds the text</td>
</tr>
<tr>
<td>I</td>
<td>Italicizes the text</td>
</tr>
<tr>
<td>☐</td>
<td>Bulleted List</td>
</tr>
<tr>
<td>☐</td>
<td>Numbered List</td>
</tr>
<tr>
<td>☐</td>
<td>Text Color</td>
</tr>
<tr>
<td>☐</td>
<td>Text Background Color</td>
</tr>
<tr>
<td>☐</td>
<td>Converts selected text into HTML paragraphs (&lt;p&gt;), headings (&lt;h3&gt;, &lt;h4&gt;, &lt;h5&gt;, &lt;h6&gt;), addresses (&lt;address&gt;), and preformatted (&lt;pre&gt;)</td>
</tr>
<tr>
<td>☐</td>
<td>Font family</td>
</tr>
<tr>
<td>☐</td>
<td>Font size</td>
</tr>
<tr>
<td>☐</td>
<td>Styles</td>
</tr>
<tr>
<td>☐</td>
<td>Undo last action</td>
</tr>
<tr>
<td>☐</td>
<td>Redo an Undo</td>
</tr>
<tr>
<td>☐</td>
<td>Create Hyperlink</td>
</tr>
<tr>
<td>☐</td>
<td>Remove Hyperlink</td>
</tr>
<tr>
<td>☐</td>
<td>View HTML code</td>
</tr>
<tr>
<td>☐</td>
<td>Creates a Horizontal line</td>
</tr>
<tr>
<td>☐</td>
<td>Paste as plain text</td>
</tr>
<tr>
<td>☐</td>
<td>Full Screen Mode</td>
</tr>
<tr>
<td>☐</td>
<td>Find</td>
</tr>
<tr>
<td>☐</td>
<td>Find and Replace</td>
</tr>
<tr>
<td>☐</td>
<td>Insert New Table</td>
</tr>
<tr>
<td>☐</td>
<td>Table Row Properties</td>
</tr>
<tr>
<td>☐</td>
<td>Table Cell Properties</td>
</tr>
<tr>
<td>☐</td>
<td>Insert Row Before Selected Row</td>
</tr>
<tr>
<td>☐</td>
<td>Insert Row After Selected Row</td>
</tr>
<tr>
<td>☐</td>
<td>Delete Selected Row</td>
</tr>
<tr>
<td>☐</td>
<td>Insert Column Before Selected Row</td>
</tr>
<tr>
<td>☐</td>
<td>Insert Column After Selected Row</td>
</tr>
<tr>
<td>☐</td>
<td>Remove Selected Column</td>
</tr>
<tr>
<td>☐</td>
<td>Split Merged Cells</td>
</tr>
<tr>
<td>☐</td>
<td>Merge Selected Cells</td>
</tr>
<tr>
<td>☐</td>
<td>Paste From Word</td>
</tr>
<tr>
<td>☐</td>
<td>Paste</td>
</tr>
<tr>
<td>☐</td>
<td>Copy</td>
</tr>
<tr>
<td>☐</td>
<td>Cut</td>
</tr>
<tr>
<td>☐</td>
<td>Remove Formatting</td>
</tr>
<tr>
<td>☐</td>
<td>Clean Up Messy Code</td>
</tr>
<tr>
<td>☐</td>
<td>Insert Special Character</td>
</tr>
<tr>
<td>☐</td>
<td>Help</td>
</tr>
<tr>
<td>☐</td>
<td>Edit Image</td>
</tr>
</tbody>
</table>
THE PATH ATTRIBUTE

The WYSIWYG Editor does not display the underlying HTML code to the screen, but rather displays a representation of what the finished page will look like. Sometimes, setting and resetting the various styling elements can add extra code that will cause the page to display in an unexpected manner. One way to get a visual clue without learning HTML is to look at the Path at the bottom of the editor area.

No matter what element the editor sets, it will be represented in the path. Some of the more common items that will be displayed in the path are paragraphs (p), bulleted list/unordered list (ul), numbered list/ordered list (ol), list items (li), bold/strong (strong), and italics/emphasis (em). The colored boxes and positioning styling are listed as spans. Also, by clicking on the individual name elements in the path, this ensures that the entire underlying HTML content gets selected and overwritten when making a change.
GETTING STARTED WITH THE TINYMCE

BOLDING TEXT

Step 1 Enter **Edit Mode**
Step 2 Select desired text
Step 3 Click **Bold** icon

Step 4 Click **Save** at the bottom of the page to save the changes

---

REMOVING BOLD TEXT

Step 1 Enter **Edit Mode**
Step 2 Click on the text to remove the bold text
Step 3 In the path, click **STRONG** to select the entire bolded item

Step 4 Click **Bold Icon**

Step 5 Click **Save** at the bottom of the page to save the changes
ITALICIZING TEXT

Step 1 Enter Edit Mode
Step 2 Select desired text
Step 3 Click Italics icon

Step 4 Click Save at the bottom of the page to save the changes

REMOVING ITALICED TEXT

Step 1 Enter into Edit Mode
Step 2 Click on the text to remove the italics
Step 3 In the path, click on EM to select the entire italicized item

Step 4 Click Italics icon

Step 5 Click Save at the bottom of the page to save the changes
CREATING A LIST WITH BULLETS

Step 1  Enter **Edit Mode**

Step 2  Position the cursor at the point where you want the Bulleted List

Step 3  Click **Bulleted List** icon

Step 4  The editor will now have a bullet item (li) on the page. Type in the desired text and press enter to start another bullet point. When done adding bullets, click the **Bulleted List** icon once again to end the list.

Step 5  Click **Save** at the bottom of the page to save the changes

REMOVING A BULLETED LIST ITEM

Step 1  Enter **Edit Mode**

Step 2  Click on the bullet point to remove

Step 3  In the path, click on **LI** to select the entire bulleted item

Step 4  Use **Delete** or **Backspace** on the keyboard to remove the list item

Step 5  Click **Save** at the bottom of the page to save the changes
REMOVING AN ENTIRE BULLETED LIST

Step 1  Enter **Edit Mode**

Step 2  Click on one of the bullet points in the list you want to remove

Step 3  In the path, click on **UL** to select the bulleted list

Step 4  Use **Delete** or **Backspace** on the keyboard to remove the list

Step 5  Click **Save** at the bottom of the page to save the changes

---

CREATING A LIST WITH NUMBERS

Step 1  Enter into **Edit Mode**

Step 2  Position the cursor at the point where you want the Numbered List

Step 3  Click **Numbered List** icon

Step 4  The editor will now have a numbered item (li) on the page. Type in desired text and click enter to start another numbered point. When done adding bullets, click the **Numbered List** icon once again to end the list.

Step 5  Click **Save** at the bottom of the page to save the changes
REMOVING AN ITEM WITH A NUMBER

Step 1 Enter Edit Mode

Step 2 Click on the numbered bullet point to remove

Step 3 In the path, click on LI to select the entire numbered item

Step 4 Use Delete or Backspace on the keyboard to remove the list item

Step 5 Click Save at the bottom of the page to save the changes

REMOVING AN ENTIRE NUMBERED LIST

Step 1 Enter Edit Mode

Step 2 Click on one of the numbered bullet points in the list you want to remove

Step 3 In the path, click on OL to select the numbered list

Step 4 Use Delete or Backspace on the keyboard to remove the list

Step 5 Click Save at the bottom of the page to save the changes
SETTING THE FONT COLOR

Step 1  Enter *Edit Mode*

Step 2  Select desired Text

Step 3  Click on the **Font Color** icon

Step 4  Select the desired color from the palette

Step 5  Click **Save** at the bottom of the page to save the changes
REMOVING THE FONT COLOR

Step 1  Enter **Edit Mode**

Step 2  Click on the text to remove the Color

Step 3  In the path, click **Span** to select all the colored text

![Path: span][1]

**Disable rich-text**

Step 4  Click **Remove Formatting (Eraser) icon**

*Note: Depending on your browser, this may remove all the formatting on the page. Also, there is a bug in Internet Explorer that will not remove the font color. To get around this, click on Span (see step 3) and delete the text, then reset the color as desired.

**Body:**

![Body](image)

Step 5  Click **Save** at the bottom of the page to save the changes
SETTING THE FONT BACKGROUND COLOR

Step 1  Enter **Edit Mode**

Step 2  Select the desired text

Step 3  Click **Font Background Color** icon

Step 4  Select the desired color from the palette

Step 5  Click **Save** at the bottom of the page to save the changes
REMOVING THE FONT BACKGROUND COLOR

Step 1  Enter **Edit Mode**

Step 2  Click on the text to remove the Background Color

Step 3  In the path, click **Span** to select the entire colored region

Step 4  Click **Remove Formatting (Eraser) icon**
        Note: Depending on your browser, this may remove all the formatting on the page

Step 5  Click **Save** at the bottom of the page to save the changes
CREATING AN INTERNAL/EXTERNAL LINK

Step 1   Navigate to the page that you want to link to
Step 2   Copy the URL for this page
Step 3   Enter into **Edit Mode** on the page where the link is to be added
Step 4   In the **Body** section, highlight the wording to be used as the link to the other page

**Body:**

```
I am an example of a [Hyperlink]
```

**Path:**

Set: p

**Disable rich-text**

Step 5   When the wording is highlighted, the “link” picture becomes available
Step 6   Click **Insert/Edit Link**; a new window will pop up

**Body:**

```
I am an example of a [Hyperlink]
```

Step 7   Paste the URL into the “Link URL” box
Step 8   Option: Fill out the Title textbox. This will create a “tooltip” (tooltips are the dialog boxes that appear when hovering over a hyperlink) for the link.

Step 9   Click **Insert**

Step 10  Click **Save** at the bottom of the page to save the changes
REMOVING A HYPERLINK

Step 1  Enter **Edit Mode**

Step 2  Click on the Hyperlink to be removed

Step 3  In the path, click on **A** to select the entire hyperlink

Step 4  Click **Unlink** Icon

Step 5  Click **Save** at the bottom of the page to save the changes
CUTTING AND PASTING FROM OFFICE APPLICATIONS

Programs like Microsoft Word, Apple’s Pages, Open Office, and Corel WordPerfect can add extra, unwanted code when you cut and paste directly from them. This extra code can lead to undesired behavior in the TinyMCE editor and should be stripped out prior to adding it to the e-Branch site. The TinyMCE has a built-in utility that will take care of this for you.

Step 1 Copy the desired text

Step 2 Enter Edit Mode

Step 3 Click on Paste from Word icon

Step 4 Click Submit at the bottom of the page to save the changes
UPLOADING AND/OR ADDING A PHOTO

Step 1  Enter **Edit Mode**

Step 2  Place the cursor where you want the image to appear

Step 3  Click **Insert/Edit Image** icon

Step 4  Click the **Browse** icon

When placing an image on the page that has been uploaded previously skip to **Step 10**
Step 5  Click on **Upload** to transfer an image file to the server

Step 6  Click **Browse**

Step 7  Browse to and Single click on the image that you want to upload
Step 8  **Option:** Select the size of the thumbnails that you would like generated on upload. Select as many or as few as you would like.

Step 9  **Click on Upload**
Step 10  Select the image you would like to insert from the list

Step 11  Click **Send to tinymce**
Step 12  Enter a description of the image in the Image Description field. This information is used for accessibility purposes.

Step 13  Click Insert

Step 14  Click Save at the bottom of the page to save the changes
WORKING WITH WEIGHTS

Step 1  Weights allow you to position system-generated content into a different order. If a weight can be applied to an element, you will see a drop down box that list allows you to set a numerical weight.

```
Weight:

0
```

Optional. In the menu, the heavier items will sink and the lighter items will be positioned nearer the top.

Step 2  In the drop-down box you will see a scale of negative and positive numbers. Negative numbers weigh less than positive numbers; therefore they rise to the top. Positive numbers weigh more than negative numbers; therefore they sink to the bottom. So if you want your new category to “float” to the top, give it a negative number. Or if you want it to “sink” to the bottom give it a heavier positive number.

If more than one item has the same weight, then the system will order them in alphabetical order. If multiple weights are applied to multiple items, then the system will order them by weight first, and then alphabetize them after that. For example, if you have apples set as -10, bananas set at 0, oranges set at 0, and pears set at -10 the items would be ordered as follows: apples, pears, bananas, oranges.
PARENT/CHILD RELATIONSHIPS

To manage how items are related to one another, Drupal taps into the power of Parent/Child relationship hierarchies. Parent items are at the top, or starting point of the hierarchy. When you want to associate similar items with the parent items, but want them to be a level below, you create a child item. Child items can also be parent items.
ADDING A PAGE TO THE MENU SYSTEM

Step 1   Enter **Edit Mode**

Step 2   Scroll down and click **Menu Settings** link

Step 3   Give the menu item a **Title** by filling in the Menu Link Title text field. This information will be used as the human-readable text people can click on.

Step 4   Select **Parent Item**

Step 5   Option: Set the **Weight**.
          For more information on weights, please refer to page 37 of this tutorial.

Step 6   Click **Save** at the bottom of the page to save the changes
ATTACHING AND LINKING TO DOCUMENTS

Step 1  Enter **Edit Mode**

Step 2  Scroll down and click on **File Attachments**

![File attachments]

Changes made to the attachments are not permanent until you save this post. The first "listed" file will be included in RSS feeds.

**Attach new file:**

The maximum upload size is 5MB. Only files with the following extensions may be uploaded: *jpg jpeg gif png txt doc docx xls xlsx pdf ppt pptx pps odp ods odp*.

[Attach]

Step 3  Click **Browse**

![Browse]

Step 4  Browse to and Single click on the file to be attached to the page
Step 5  Click Open  
*The path and title of the document will appear in the Attach new file box

Step 6  Click Attach  
When the document is successfully attached, the File attachments section will refresh and the hyperlink to the document will automatically appear

If the List Checkbox is checked, it means that the page will automatically generate a list of attached documents.

<table>
<thead>
<tr>
<th></th>
<th>Delete</th>
<th>List</th>
<th>Description</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add new file:</strong></td>
<td></td>
<td></td>
<td>test.docx</td>
<td>9.85 KB</td>
</tr>
<tr>
<td></td>
<td><img src="http://demo.lili.org/files/demo/test.docx" alt="File" /></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 7  Highlight the URL under the attachment name and “copy” it

Changes made to the attachments are not permanent until you save this post. The first "listed" file will be included in RSS feeds.

<table>
<thead>
<tr>
<th></th>
<th>Delete</th>
<th>List</th>
<th>Description</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="http://demo.lili.org/files/demo/test.docx" alt="File" /></td>
<td></td>
<td><img src="http://demo.lili.org/files/demo/test.docx" alt="File" /></td>
<td>test.docx</td>
<td>9.65 KB</td>
</tr>
</tbody>
</table>

Step 8  Create a hyperlink in the body section of the page, if desired  
see page 28 for instructions on creating a hyperlink

Step 9  Click Submit at the bottom of the page to save the changes  
Note: File Attachments will not be saved until the page is submitted
CUSTOM URLS

Each page URL is uniquely assigned a “node” number and this information is appended to the end of the page URL (libraryname.lili.org/node/<unique number here>). While this numbering scheme works for the majority of situations you come across, there are times when some pages need to be highlighted by a custom URL (also called Clean URLs).

For example, for promotional materials you want to tie to the website, you can create a unique, more readable, URL for the page. This should not be done full scale throughout the site; rather, just to make access easier to the designated special pages. If your page would benefit from a custom URL – i.e. libraryname.lili.org/services – the following steps should be followed:

Step 1  Enter **Edit Mode**

Step 2  Scroll down and click on **URL path settings**

![URL path settings](image)

Optionally specify an alternative URL by which this node 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.

Step 3  Type in the word you want to appear after the / in the URL

Step 4  Click **Save** at the bottom of the page to save the changes
**SCHEDULING A PAGE TO AUTOMATICALLY PUBLISH/UNPUBLISH**

**Step 1** Enter **Edit Mode**

**Step 2** Scroll down and click on **Scheduling Options**

**Publish on:**
Format: 2009-06-12 07:08:00. Leave blank to disable scheduled publishing.

**Unpublish on:**
Format: 2009-06-12 07:08:00. Leave blank to disable scheduled unpublishing.

**Step 3** Enter a date in the **Publish on** box. Be sure to include date and time in the format shown in the example on the screen. If the box is left blank, the announcement will be posted immediately.

**Step 4** Option: Enter a date and time in the **Unpublish on** box. Again, pay attention to the format of the date and time.
*Note: It is possible to post something for immediate viewing and to schedule a removal date*

**Step 5** Click **Save** at the bottom of the page to save the changes.
EDITING ONLINE CONTACT INFORMATION

Step 1  Find the Contact Us link on your site and click on it to bring up the **site-wide contact form** to get an idea of what the form looks like

![Contact Form](image_url)

Step 2  Click **Administer >> Site building >> Contact form**
Step 3  Click **Settings** tab, then edit the message in the **Additional Information** text box so it displays the correct information on the **site-wide contact form**.

### Contact form

<table>
<thead>
<tr>
<th>Category</th>
<th>Recipients</th>
<th>Selected</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questions or Comments</td>
<td><a href="mailto:lili@libraries.idaho.gov">lili@libraries.idaho.gov</a></td>
<td>No</td>
<td>edit</td>
</tr>
</tbody>
</table>

**Contact form**

**Additional information:**

You can leave a message using the contact form below.

**Hourly threshold:**

3

The maximum number of contact form submissions a user can perform per hour.

Enable personal contact form by default

Default status of the personal contact form for new users.

**Save configuration**  **Reset to defaults**

---

Step 4  Click **Save Configuration** when finished making changes

Step 5  To verify the changes were made, find the Contact Us link on your site. You should now see the changes made to the site-wide message.
ADDING ADDITIONAL CONTACTS WITH CATEGORIES

Step 1  Click **Administer >> Site Building >> Contact Form** and then click on the Add Category tab
see Editing the Online Contact Information section for screenshots

**Contact form**

<table>
<thead>
<tr>
<th>Category</th>
<th>Recipients</th>
<th>Selected</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questions or Comments</td>
<td><a href="mailto:lili@libraries.idaho.gov">lili@libraries.idaho.gov</a></td>
<td>No</td>
<td>edit delete</td>
</tr>
</tbody>
</table>

Step 2  Fill in the **Category** and **Recipient** boxes. The **Auto-Reply** is optional. Category can be the name of the department or perhaps the name of a person.

**Recipient** is the email address or addresses of the department or person.
Note: You must enter something in any box with a red asterisk (*).

**Auto-Reply** will automatically send out a response message to the e-mail address that is provided by the person filling out the form

Example:
Category:  Reference
Recipient:  [demo@your.email](mailto:demo@your.email)
Auto-Reply:  [This is optional, no asterisk]
Contact form

Category: *
Example: ‘website feedback’ or ‘product information’.

Recipients: *
Example: ‘webmaster@example.com’ or ‘sales@example.com.support@example.com’. To specify multiple recipients, separate each e-mail address with a comma.

Auto-reply:
Optional auto-reply. Leave empty if you do not want to send the user an auto-reply message.

Step 3  Option: Set the **Weight** of the category
See the section about Weights on page 36

**Weight:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>✓</td>
</tr>
</tbody>
</table>

When listing categories, those with lighter (smaller) weights get listed before categories with heavier (larger) weights. Categories with equal weights are sorted alphabetically.

Step 4  Option: Make a category the default
This is used when there is more than one category

**Selected:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Set this to Yes if you would like this category to be selected by default.

Step 5  Click **Save** at the bottom of the page to save the changes
FINDING, EDITING, AND DELETING NODES

Step 1  Click **Administer >> Content management >> Content**

Step 2  Option:  By default, Drupal will display all of the nodes that have been created.  To narrow down this list, you may apply **Filters**
The **Status Filter** will allow you to filter the node listing by published, not published, promoted, not promoted, sticky, or not sticky statuses.

The **Type Filter** will allow you to filter the node listing by node types.

The **Category Filter** will allow you to filter the node listing by taxonomy.
Step 3  Select the desired node from the list by clicking the checkbox to the left of the page title.

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Author</th>
<th>Status</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome to Our Library!</td>
<td>Page</td>
<td>admin</td>
<td>published</td>
<td>edit</td>
</tr>
<tr>
<td>Youth Services</td>
<td>Page</td>
<td>admin</td>
<td>published</td>
<td>edit</td>
</tr>
<tr>
<td>Accessibility Information</td>
<td>Page</td>
<td>admin</td>
<td>published</td>
<td>edit</td>
</tr>
</tbody>
</table>

To select the entire list, click the checkbox to the left of Title

Step 4  Select the desired action from the **Update options** dropdown list

Step 5  Click **Update** to save the changes
ADDING A HYPERLINK TO THE MENUING SYSTEM
without creating a page

Step 1   Click Administer >> Site Building >> Menus
Step 2  Select the menu you are adding to

**Menues**

| List menus | Add menu | Settings |

**Navigation**

The navigation menu is provided by Drupal and is the main interactive menu for any site. It is usually the only menu that contains personalized links for authenticated users, and is often not even visible to anonymous users.

**On Our Site**

**Primary links**

Primary links are often used at the theme layer to show the major sections of a site. A typical representation for primary links would be tabs along the top.

**Secondary links**

Secondary links are often used for pages like legal notices, contact details, and other secondary navigation items that play a lesser role than primary links.

Step 3  Select **Add Item**

**Navigation**

| List items | Add item | Edit menu |

**Menu item**

| Enabled | Expanded | Operations |

Step 4  Set the **Path**. The path is the URL that you want to point to.

**Path:** *

The path this menu item links to. This can be an internal Drupal path such as `node/add` or an external URL such as `http://drupal.org`. Enter `<front>` to link to the front page.

Step 5  Set the **Menu Link Title**

**Menu link title:** *

The link text corresponding to this item that should appear in the menu.
Step 6  Option: Add a **Description** to the menu item

![Description field]

The description displayed when hovering over a menu item.

Step 7  Click **Save** at the bottom of the page to save the changes
POSTING TO YOUR BLOG

Step 1  In the administrator menu, click Create Content >> Blog Entry

Step 2  Enter a title for the blog entry in the box beneath “title.” Titles should be descriptive of the content, much like a headline.

Create Blog entry

Title: *

Step 3  In Content Editor, type the content of the blog entry

Step 4  Click Save at the bottom of the page to save the changes
WORKING WITH RSS FEEDS

Step 1  Click **Administer >> Content Management >> Feed aggregator**
Two Sections:

a. **Feed Overview**: shows the feeds currently linked to the e-branch site.  
b. **Category Overview**: shows categories of feeds on the e-branch site.

### Feed aggregator

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Last update</th>
<th>Next update</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-branch Blog</td>
<td>0 items</td>
<td>11 sec ago</td>
<td>5 hours 59 min left</td>
<td>edit, remove items, update items</td>
</tr>
<tr>
<td>Idaho Commission for Libraries Blog</td>
<td>0 items</td>
<td>24 weeks 6 days ago</td>
<td>0 sec left</td>
<td>edit, remove items, update items</td>
</tr>
<tr>
<td>NPR Books</td>
<td>15 items</td>
<td>12 sec ago</td>
<td>5 hours 59 min left</td>
<td>edit, remove items, update items</td>
</tr>
<tr>
<td>NPR Top Stories</td>
<td>15 items</td>
<td>11 sec ago</td>
<td>5 hours 59 min left</td>
<td>edit, remove items, update items</td>
</tr>
</tbody>
</table>

### Category overview

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho Library News</td>
<td>0 items</td>
<td>edit</td>
</tr>
<tr>
<td>NPR Books</td>
<td>15 items</td>
<td>edit</td>
</tr>
<tr>
<td>NPR News</td>
<td>15 items</td>
<td>edit</td>
</tr>
</tbody>
</table>
EDITING CATEGORIES

Step 2  Click **Administer >> Content Management >> Feed aggregator**
See page 55 for the screenshots of this menu location

Step 3  Locate the category that you want to change and click **Edit**

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho Library News</td>
<td>0 items</td>
<td>edit</td>
</tr>
<tr>
<td>NPR Books</td>
<td>15 items</td>
<td>edit</td>
</tr>
<tr>
<td>NPR News</td>
<td>15 items</td>
<td>edit</td>
</tr>
</tbody>
</table>

Step 4  Enter a new title in the **Title** textbox

**Edit category**

**Title:**

NPR News

Step 5  Change the **Description** to reflect feeds that will be categorized

**Description:**

*Top news stories from National Public Radio.*

Step 6  Click **Save** at the bottom of the page to save the changes
ADDING A NEW CATEGORY

Step 1  Click **Administer >> Content Management >> News aggregator**
See page 55 for the screenshots of this menu location

Step 2  Click **Add Category**

Step 3  Enter in the **Title** for the new category

![Feed aggregator](image)

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Last update</th>
<th>Next update</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Feed</td>
<td>0</td>
<td>8 min 37</td>
<td>5 hours 31 min</td>
<td>add, remove, update</td>
</tr>
</tbody>
</table>

Step 4  Enter in the **Description** for the new category

![Description](image)

Step 5  Click **Save** at the bottom of the page to save the changes
ADDING A FEED
(Example: New York Times Book Reviews)

Step 1 In a separate browser window, go to http://www.nytimes.com/

Step 2 Scroll to the bottom of the NYT page and click on RSS. This feature is available on many large sites as a service to help people easily locate the RSS feeds they have available.

Step 3 In the list of feeds, locate the feed for “Book Reviews” and click on the RSS button next to it. Depending on your browser, this page might look like undecipherable code. On more modern browsers (Internet Explorer 7, Firefox 2, Safari 2) the most current headlines will be displayed.

NEWS

NYTimes.com Home Page (U.S.)

NYTimes.com Home Page (Global Edition)

World (7 RSS feeds)

World

Americas

Europe

Africa

Asia Pacific

Middle East

Baghdad Bureau Blog

Step 4 Select the URL of this new page from the address bar up top and COPY it.

Step 5 Return to the browser window that is logged into your e-branch site.

Step 6 Click Administer >> Content Management >> News aggregator
See page 55 for the screenshots of this menu location.
Step 7  Click **Add Feed**

![Feed aggregator](image)

**Feed aggregator**

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Last update</th>
<th>Next update</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-branch Blog</td>
<td>0</td>
<td>8 min 37</td>
<td>5 hours</td>
<td>update</td>
</tr>
</tbody>
</table>

Step 8  Add a Title to the title textbox  
For example, New York Times Book Reviews

**Title:** *

The name of the feed (or the name of the website providing the feed).

Step 9  In the **URL** text box, paste the URL copied from the NYT site

**URL:** *

The fully-qualified URL of the feed.

Step 10 Select an **Update interval**. This indicates how frequently the e-branch site will go look for new content at the New York Times Book Review  
Example: 12 hours.

**Update interval:**

15 min

The length of time between feed updates. (Requires a correctly configured cron maintenance task.)
Step 11 Select a **Category** for this feed by clicking in the box by the category name.

**Categorize news items:**

- Idaho Library News
- NPR Books
- NPR News

New feed items are automatically filed in the checked categories.

Step 12 Click **Save** to save the changes

Note: The system will check for updates every 12 hours. You can manually request the feed be updated at any time.

---

**MANUALLY UPDATING FEED ITEMS**

Step 1 Click **Administer >> Content Management >> Feed aggregator**

See page 55 for the screenshots of this menu location

Step 2 Locate the desired feed in the list and click **Update items**

**Feed overview**

<table>
<thead>
<tr>
<th>Title</th>
<th>Items</th>
<th>Last update</th>
<th>Next update</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-branch Blog</td>
<td>0 items</td>
<td>46 min 26 sec ago</td>
<td>5 hours 13 min left</td>
<td>edit</td>
</tr>
<tr>
<td>Idaho Commission for Libraries Blog</td>
<td>0 items</td>
<td>24 weeks 6 days ago</td>
<td>0 sec left</td>
<td>edit</td>
</tr>
</tbody>
</table>
WORKING WITH BLOCKS

ADDING A BLOCK
(Example: for local news)

Step 1  Click **Administer >> Site Building >> Blocks**

Step 2  Click **Add block**

**Blocks**

<table>
<thead>
<tr>
<th>Block</th>
<th>Region</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 3  Enter in a description of your block in the **Block Description** text field

**Block description:** *

A brief description of your block. Used on the block overview page.

Step 4  Enter in the desired content in the **Block body**

Note: This text area can accept text, html, and code snippets

**Block body:**

Path:

*Disable rich-text*

The content of the block as shown to the user.

Step 5  Click **Save block** to save the changes
ENABLING, DISABLING AND POSITIONING BLOCKS

Step 1  Click **Administer >> Site Building >> Blocks**
See page 62 for the screenshots of this menu location

Step 2  Locate the block that you want to work with in the listing

Blocks

<table>
<thead>
<tr>
<th>Block</th>
<th>Region</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>Add block</td>
<td></td>
</tr>
<tr>
<td>Block</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Content

*No blocks in this region*

Left Sidebar

- On Our Site
- Recent blog posts
- Navigation

Right Sidebar

- e-Branch Help Site link
- Links to U of I Portal Services

Step 3  To the right of the Block’s title, select the **Region** where you want to place the block from the drop down list

Step 4  Option: Use the handle ![handle](image) to move the block higher or lower on the list, or to move it to another region entirely.

Step 5  Click **Save Block** to save the changes

Save block
ADDING ANOTHER SITE’S WIDGET
(Example: Weather)

Step 1   In a separate browser window, go to http://netweather.accuweather.com

Step 2   Follow the instructions on the web site for setting up the weather for your library website.

Step 3   Copy the snippet from that the site provide (Web Page Code)

Step 4   Open your e-Branch site in your browser

Step 5   Click Administer >> Site Building >> Blocks
See page 62 for the screenshots of this menu location

Step 6   Click Add Block

Step 7   Enter in a description of your block in the Block Description text field

Block description: *

A brief description of your block. Used on the block overview page.
Step 8  Since we are pasting in a code snippet, click Disable rich-text so the editor will not try to interpret the code for us

Block body:

Path:

Disable rich-text

The content of the block as shown to the user.

Step 9  Paste the code snippet in the Block body

Step 10  Click Save block to save the changes

Step 11  Enable and Position the block

See page 64 for the walkthrough on this
WORKING WITH THEMES

CHANGING THE THEME

Step 1  Click Administer >> Site Building >> Themes
Step 2  
To select one of the available themes, check the **Enabled** checkbox and select the **Default** radio button located to the right of the screenshot of your desired theme.

### Themes

<table>
<thead>
<tr>
<th>Screenshot</th>
<th>Name</th>
<th>Version</th>
<th>Enabled</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>drupal</td>
<td>Bluemarine</td>
<td>6.10</td>
<td></td>
<td>○</td>
</tr>
<tr>
<td>Garland – Fluid Width</td>
<td>Garland</td>
<td>6.10</td>
<td></td>
<td>○</td>
</tr>
</tbody>
</table>

**Bluemarine**
Table-based multi-column theme with a marine and ash color scheme

**Garland**
Tableless, recolorable, multi-column, fluid width theme (default).

Step 3  
Click **Save Configuration** at the bottom of the page
ADDING YOUR LOGO TO A THEME

Step 1  Click Administer >> Site Building >> Themes
*See page 67 for the menu screenshots

Step 2  Click on Configure

Step 3  Click on the name of the theme that you are using
*Note: The example images in this tutorial were taken from the GrandCentral theme

Step 4  Scroll down to Logo image settings and uncheck Use the default logo.
Step 5  Scroll down to the **Upload logo image** box and click **Browse**
*Tip: this logo should have a white or transparent background and be no larger than 150 pixels by 150 pixels.

Step 6  Browse to and Single click on the image that you want to upload

Step 7  Click **Save Configuration** at the bottom of the page
EMBEDDING A GOOGLE CALENDAR INTO YOUR SITE

Step 1  Go to http://www.google.com/calendar

Step 2  Click Create a new Google Account
        If you already have an account with Google, login and skip to Step 7

Step 3  To create an account, enter in your e-mail address and choose a password
Step 4  Enter in your Name, Location, Time Zone, and complete the CAPTCHA

Step 5  Click I accept Create my account to finish creating your account
Step 6  Add events to your Google Calendar

Step 7  Click Manage Calendars
Step 8  To make the events be publically viewable, Click **Share this Calendar**

Step 9  Select **Share all information on this calendar with everyone**

Step 10  Save
Step 11  Click **Manage Calendars**

![Manage Calendars](image)

Step 12  Click on the Name of Your Calendar that you want to Embed on Your Site

![Calendar Settings](image)

Step 13  Scroll Down to the **Embed this Calendar** Section

![Embed This Calendar](image)
Step 14  **Copy** the code snippet found in the text area  
Optional: Click the link Customize the color, size, and other options

![Code Snippet](http://www.google.com/calendar/embed?src=eric_hildreth%40libraries.idaho.edu&ctz=America%2FLos_Angeles)

Step 15  Enter into **Edit Mode** on Your e-Branch Site

Step 16  The code that we copied from Google is in HTML. The TinyMCE editor does not allow you to paste HTML code directly into it, so you must **Disable Rich Text**.

**Body:**

Enable HTML Mode.  

Path: p

Disable rich-text
Step 17  **Paste** the code snippet into the body

**Body:**

```html
<iframe src="http://www.google.com/calendar/embed?src=erio.hildreth%40libraries.idaho.gov" style="border: 0" width="800" height="600" frameborder="0" scrolling="no"></iframe>
```

Step 18  **Click** **Save** at the bottom of the page to save the changes
e-branch in a box