Content Entry Guide Library

Yale Research - Drupal 9
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Drupal Overview
Basic Terminology

- **Template**: Unique page types with specific layouts (some elements may be reorderable, some may not) designed to fulfill specific communications purposes — imagine this is the LEGO baseplate.

- **Component**: Structured pieces of content that can be re-used on a recurring basis across a site, swapped in and out of a template to meet page goals — imagine these are LEGO bricks. (ex. Checkerboard on an About page vs on a Program page)

- **Block**: A piece of content that can appear on a specific page, or on multiple pages (the same content) (ex. footer)

- **Workflow**: The flow of content from initial creation to publication. For example, “Draft ➔ Needs Reviews ➔ Published”
In Drupal, content can appear in various places in various ways.

For example, a single News item will be created, and it can appear in multiple places:

1. It will automatically create a “News Detail” page
2. It will automatically be added to the News Listing page
3. It may be pulled into the Newsroom page
4. It can be pulled into a featured News component, which is available on:
   a. General pages
   b. Program Detail pages

See [next slide](#) for visual to accompany this information
Created Once, Used Multiple Places!

**News Detail**
*Using full content - Title, image, author, full text, related items, etc.*

**News Listing**
*Using partial content - Image, date, summary, title, categories*

**Newsroom**
*Using partial content - Image, date, title, Main Category*

**News component**
*Using partial content - Image, date, title, Main Category*
Logging In
Go to https://live-research-yale-edu.pantheonsite.io/user

The first time you go to the site you will be asked for authentication info
- username: admin
- pw: ohosite1100
Log in

- Enter your username and password, as provided by your administrator

Username

* Enter your Yale Research username.

Password

* Enter the password that accompanies your username.

Log in
Reset your password

- On the login page, you also have access to a button to Reset your password.
● Once in, you should see a new navigation at the top of your screen, and buttons at the bottom.

● The buttons at the bottom right will vary depending on what page you’re on.
  ○ On login (the “view profile”) page, there will be one set of buttons, depending on your permissions.
  ○ Most other pages will have a set of buttons to work with the page being viewed, most importantly, an Edit button.
User Management
Managing Users

The ability to manage users depends on your user permissions.

- Click “People” tab
User Listing

- Create a new user by clicking “+Add User”
- Edit existing users by clicking on their username or the “Edit” button under Operations column
Masquerade as another user

This functionality is usually limited to administrator users only.

- In the “People Listing” find the user you would like to Masquerade as
- Under “Operations” column, select the small carrot to open a menu and select “Masquerade as”
- The site will reload and bring you to the homepage so you can view the site from their log in role (see next slide)
Masquerade: Exiting Masquerade Mode

- In the masquerade mode, you can see the top content entry tab has changed and the bottom quick buttons have changed to reflect what the user you have masqueraded has access to.
- To unmasquerade and return to your normal permissions, click “Unmasquerade” in the top bar.
Creating Content
Publishing New or Edited Content

**Draft permissions only**
- If this is a brand new page, on “Save”, the page will save as an Unpublished draft for someone to review and publish.
- If this is an edit to a page, on “Save”, a new revision of the page will be created and be called “Latest Version.” The reviewer can click on the “Latest Version” tab (in the lower right of the view page, or upper left of the edit page) to view the changes. From there, the changes can be published using the options in the “Change To” dropdown and clicking “Save.”

**Publish permissions**
- Publish - If the user has Publish permission, then the page can be published at any time.
- Draft - This user can also create a new Draft version (e.g., “Latest Version”); the page remains published.
- Unpublished - Choosing “Unpublished” will unpublish the page entirely (make it not visible to site users who are not logged in). The page can be published again at any time; it does not get deleted from the site.

**Note:**
Deleting content on the site is permanent. Consider unpublishing content rather than deleting it.
Published vs. Unpublished Content

Published Content
- Published content will appear on the site to “anonymous” (not logged in) site users.
- If a page is published, all of the content created on that page will appear on it.
  - Individual components on a page can not be unpublished from a published page, with 1 exception: If there is a component that is pulling in content, such as the Featured Cores component (as described in the “Created once, used multiple places” section above), it will only pull in Published items. If there is a Core Detail item that fits the criteria to appear in the Featured Cores component, but it is Unpublished, then it will not appear, and the next matching items will appear instead.

Unpublished Content
- Unpublished content is only visible to some logged in users, depending on their permissions.
To create new content, click the “Add content” button.

Or, from the navigation, hover over Content > Add content > and select the type of content you’d like to create.
You can Edit or Delete form field content by selecting the content and using the Delete button.

To edit other types of content, see the following sections in this training guide:

- Media
  - Remove (or replace) a media item
- Flexible Area component
  - Remove a component from the Flexible Components Area
- Prescribe Order component
  - Remove a component that is in a “Prescribed Order”
You can Edit or Delete a page from the page view itself using the tab buttons in the bottom right of the page (depending on your permissions).
Edit/Delete Content – View page from Edit screen

From the Edit screen, you can also return to view the page using the “View” button.

Note: Be sure to save any changes first!
Saving New or Edited Content

Click the “Save” button to save your content.

Depending on your permissions, you may be:

1. Able to save a Draft only (a 1st draft or a revision to an existing Draft or Published item)
2. Able to Publish the new or edited item immediately
Copying & Pasting “Clean” Text (without inline styles tagging along)

When copying and pasting from documents like Word, inline styles may paste with your content. When inline styles are pasted, they override the CSS styles selected in the WYSIWYG.

When pasting, be sure to use the Mac or PC hotkey shortcuts:
- Mac - Command+Shift+V
- PC - Ctrl+Shift+V

You can also rollover or click the “Paste as plain text” button for instructions.

If you paste with inline styles and need to remove them, you can select the Remove Format button:
**Flexible Component Area**

The site may include one or more Flexible Components Areas. This is a designated section of a template in which a number of specific components can be added in any order, as many times as desired, or not at all.

Each component is:
- Reorderable
- Repeatable
- Optional

The flexible component area allows for unlimited components.

The annotations will specify exactly which part of the template is the Flexible Components Area and which components are available.

When creating a template that includes this, the editor will see a section of the template that looks something like this:

```
PAGE COMPONENTS

No Component added yet.

Component type

[Checkerboard]

[Add Component] to Page Components
```
Flexible Component Area

To start creating a component, click the “Page Components” dropdown to select a component to create. On click, the chosen component’s fields will be added to the form.

Repeat this for each subsequent component.
Components appear in the order they are added, but they can be reordered, using drag and drop.
Flexible Component Area

The fields for the chosen component will load, such as the example of a News Section component below. Content can be added per the requirements in the Annotations.

Page Components

News Section

Title *

Yale News Link *

URL *

Start typing the title of a piece of content to select it. You can also enter an internal path such as /node/add or an external URL such as http://example.com. Enter &lt;front&gt; to link to the front page. Enter &lt;nolink&gt; to display link text only. Enter &lt;button&gt; to display keyboard-accessible link text only.

Link text *

On site launch, use the Yale News homepage URL. Once Yale News incorporates a "Research" topic, update this URL to a view of news filtered by "Research"
Flexible Component Area - Remove a component

If the News Section component has been added, the editor can delete it by clicking the three dots to reveal the “Remove” button.

You will NOT be asked to confirm removal so be sure before you click the “Remove” button.

Note that any content that had been added to this component will be permanently deleted.
Flexible Component Area

When a component has multiple items

Some components allow for multiple items in the component, such as:
- Checkerboard
- Gallery
- Differentiators

In these cases, any top level fields will be exposed (e.g., Title, Description, Link), but only the fields for an initial item will be exposed at first.

For example, you will see all the fields to create the first Image/Video Gallery item, as in the example to the right.

To create additional Gallery items, click the “Add [item]” button under the 1st item's fields. This will add a set of fields for an additional item.
Repeat as needed.
Prescribed Order Components

A template may include one or more “Prescribed Order” Components. These components must appear in a certain order on the template, so they are not reorderable. They may, however, be optional to add to the template.

An example could be a Services List on a Core/Facility Detail page.

If a Services List is added, it will always appear in a designated location, such as just below the Instruments/Equipment List content.

When creating a template that includes this, the editor may see a section of the template that looks something like this:

Services List

Add Core/Facility Services List
Prescribed Order Components

- Promo Banner
- Body Section
- Contact Section

If an editor clicks the "Add Contact Section" button, that section will expand to display the Contact Section form fields.

The Contact Section is not required. If an editor does not wish to include a Contact Section with the Core/Facility Detail, the template can be saved without adding a Contact Section.

Since some fields are required, once the component is added to the template, the editor must fill out required fields before they can save the template.
Prescribed Order Components - Remove a component

If the Contact Section component has been added, the editor can delete the Contact Section by clicking the "Remove" button.

Note that any content that had been added to this component will be permanently deleted on confirmation.
Creating a New Webform

To create a new web form, use the navigation to get to Structure > Webforms > Forms and the client the “Add Form” button.
Creating a New Webform

- Give the webform a title. This is for administrative purposes only; it will not display in the form.
- Click the Save button; this creates the framework of your webform and takes you to the "Build" tab.
Creating a New Webform

The **Elements** page allows users to add, update, and manage elements for their webform.

- **Add element**
- **Add page**

On the "Build" tab, you can add the desired elements to your form. A "Submit" button will be automatically added.

- Click the "Save elements" button.
Creating a New Webform

In the webform, click the "Settings" tab, and then choose the "Confirmation" sub-tab.

You can choose what type of confirmation you want on submit of a form, e.g., do you want the page to refresh with a confirmation message in place of the form ("Inline") or have users redirected to a specific URL ("URL with message")?

Fill out any desired fields.

Click the Save button.
Content Listing
Clicking on the “Content” tab will take you to this screen, where you can see a searchable, filterable list of all Nodes on the site.
Filter Content

To filter your content:

- Type your search in the “Title” field
- Select your content type or published status from the dropdown
- Click the “Filter” button
- To clear all current filters, click “reset”
To sort your content:

- Click on the header of the column you’d like to sort by (e.g. to sort by Title, click the word “Title”).
- You can reverse the order it’s sorted by clicking the header again.
The “Operations” column has dropdown buttons which allow you to edit or delete a piece of content quickly.
To delete content in bulk:
- Check the boxes you’d like to affect
- Select the Action you’d like to take
- Click “Apply to Selected Items”
Global Functionality
Overview of the Media Library

Features
- The media library
  - Allows access to previously uploaded items of all types
  - Allows the upload of the most common types of items
  - Allows for a search and filter to find what you need
  - Places selected media at the point of entry

Media Types
1. Document
2. Icon
3. Image
4. Remote Video Embed (*play-in-place or lightboxed videos*)
5. Remote Video File (*only used if ambient hero videos on the site*)

Misc. note: If the site uses .svg files for icons, only the highest level administrators can add certain icons to the Media Library for security reasons.

The slides below describe the Media module's user interface and outline 3 main tasks
- Overview of the Media tab
- **Task:** Uploading media items in the Media tab
- **Task:** Uploading media item at point of entry, using the Media popup
- **Task:** Removing and replacing media at point of entry
**Media tab**

The access the Media tab, go to to the Content menu.

Click “Media” in the dropdown or click the “Media” tab next to the “Content tab.”
Media tab

The layout of the Media tab is similar to the Content tab.

Options in the Media tab:
- View items in table format or grid format
- Add new media items
- Edit existing media items
- Filter and search for media items
- Additional bulk actions in a dropdown
Adding Media items

Media items can be added in a couple of ways.

1. **Media tab** - Found next to the Content tab
   
   Here you can view and add media content and perhaps edit and delete depending on your permissions. Media added here is available to add to a page template.

2. **Media popup** - Found at point of entry
   
   Points of entry include:
   - Full HTML WYSIWYG text areas
   - Upload image or video
   
   Media added at point of entry will be added to the page template as well as be available in the Media Library to be added elsewhere in the site, as needed.
1. Media tab – “Add” button

Media tab’s “Add media”:

Add media item: Choose desired media type here

- **Document**
  A locally hosted document, such as a PDF.

- **Icon**
  Locally hosted icon images.

- **Image**
  Locally hosted images.

- **Remote Video Embed**
  A remotely hosted video embed from YouTube or Vimeo.

- **Remote Video File**
  A remotely hosted video file.
1. Adding images in the media tab

Upload Images

To upload an image, type a Name, browse to and select the desired image file, and add any Media Tags. *(Or, in the Media Popup, you can drag and drop an image into the popup.)*

When uploading image, use the following best practices:

- Use dashes - not underscores _; Do not use spaces and 255 characters max
- Example: 720x480-first-year-orientation-student.jpg
1. Adding videos in the media tab

**Upload “Remote Video Embed” Video**
*(this is for videos that play in a lightbox or in place on the page)*

Type a Name, add the Video URL, and add any desired Media Tags.

This type of video takes a Video URL such as:
https://vimeo.com/176449397

**Upload “Remote Video File” Video**
*(this is for muted ambient videos, usually used in the Hero section)*

Type a Name, add the Video URL, and add any desired Media Tags.

This type of video takes a Video URL such as:
https://player.vimeo.com/external/410192281.hd.mp4?s=6811ce430a3ab37be0a79183292deb6bf4cd62&profile_id=175
*(For information on how to access a URL like this, visit the Vimeo Help Center)*
1. Adding documents in the media tab

Upload Documents

Type a Name, browse to and select the desired file, and add any Media Tags.
1. Adding icons in the media tab

**Upload Icons**

Type a Name, browse to & select desired icon file, and add any Media tags.

*If “allowed types” include .svg files, adding icons may be restricted to Administrators.*

![Add Icon Form Screenshot](image)
2. Media popup - Features

The screenshot on this slide shows the most generalized version of the media popup, for example, this is what appears on click of the “Insert from Media Library” in a Full HTML text area. In some cases, when the template specifically calls for an image or a video, the media popup may show a more limited/filtered view.

See next slides to see a larger view of the Media Popup and examples of filtered popups.

Full HTML text area’s “Insert from Media Library” icon
2. Media popup - various media (tab options)
2. Media popup - Filtered Popup: Image

Some page templates may call for an image.

On click of the “Add media” button, the “Add or select media” popup opens.

The content of this popup is pre-filtered to show **ONLY images** from the Library and the “Add file” area and filtering fields for ease of finding, filtering, and uploading image content.
2. **Media popup - Filtered Popup: Remote Video Embed (YouTube/Vimeo URL)**

Some page templates may call for a video.

On click of the “Add media” button, the “Add or select media” popup opens.

The content of this popup is pre-filtered to show **ONLY Remote Video Embed videos** from the Library and the “Add Remote Video Embed via URL” area and filtering area for ease of finding, filtering, and adding video embed content.
Two ways to link to documents

These assume that the item has already been created.

1. Title + URL field type-ahead
   - Start typing the name of the media document item in the URL autocomplete field. It should appear as an option.

2. Copy path from media document item directly
   - Go to the Media listing ("/admin/content/media").
   - Find the media document item you wish to link to.
   - Copy the media item’s relative URL (e.g., "/documents/my-media-name").
     - Include the preceding slash
     - Do not include the domain name (e.g., “https://www.myschool.edu”)

Ways to copy a media item’s relative URL:
- Right click the media document item’s name in the listing and copy the link address. Be sure to remove the domain name.
- Edit the media document and copy the URL alias field content from the URL alias section of the edit form.
Two types of replacing

You can replace the entire media item, or just the media file

“Media Item” = media file, file name, description, author information, etc.

- **Option 1** – Remove a media item reference (found on an existing page template)
  - A new and different media item can be added in its place, if desired/required.
  - Note: The removed media item is retained in the Media Library.
- **Option 2** – Replace just the media file within a media item
  - This leaves the file name and metadata intact.
  - For example, this is useful if a newer version of a file is available; the file can be updated in the media item, and every instance of this media item will point to the new version everywhere that media item is referenced in the site.

*See the following slides for steps to accomplish either of these options.*
1. **Removing or replacing entire media item** *(in a template)*

- To replace an existing media item on a page, go to the Edit view of the page.
- Expand the appropriate section if needed (sections are collapsed to more easily navigate the page).
- Click the “X” button in the item’s top corner to remove it.
- The field will revert to empty, as though an item were never added to it.
  - Note: The media item remains in the Media Library, but it can be deleted from the Library if desired, depending on the user’s permissions.
- A new media item can be uploaded or selected from the Media Library, as described in the Uploading section above.
2. Replacing file only, p.1

Steps to replace a file:
- Go to Content → Media
- Locate the media item you want to update in the listing, and click its “Edit” button
- (see next slide for add’l steps)

In these screenshots, a document file is being replaced in a Document media item.
Media - Replacing an existing media item

1. Click “Remove” to remove the old file you want to replace.
   - The file and description will disappear.
2. Click “Choose File” to upload the new file, and add a description.
3. A confirmation notification will appear on the main Media listing page.
   - All instances of the media item will reference this new file across the site automatically.

---

2. Replacing file only, p.2

Add Document

- Name: Lorem Ipsum Test Copy
- File: UAT Content Entry Training - Body Copy.pdf
- Description: test document

- Click “Remove” to remove the old file you want to replace
  - The file and description will disappear
- Click “Choose File” to upload the new file, and add a description
- A confirmation notification will appear on the main Media listing page
  - All instances of the media item will reference this new file across the site automatically.
FOCAL POINT
**Focal Point**

For sites with Focal Point enabled, you can choose any sized image that is at least the size of the specified dimensions.

You do not need to create and upload images that are exactly the recommended upload size mentioned in the Help Text.

**The uploaded image can be horizontal, vertical, or square.** The "Focal Point" tool and pre-set image styles will crop & style the image for each hero/main image and component, making the selected point as close to the middle as possible.
Focal Point

Focal Point adds a white "+" on images in the Media Library, defaulting to the center.

It can be moved to a desired location (for example, to the right, centering on the right-hand elephant). See the Features to the right for notes on how that affects the image.

Features

- The Focal Point is available to edit on initial upload ("Add image") as well as on edit of an uploaded image in the Media tab.
  - The focal point is not editable when selecting an image in the Media Popup.
- Default location of focal point is center (appears as a small white "+" on the image).
- User can click on the image to move the focal point to point-of-click.
- The tool will make the chosen "+" point as close to the center of the cropped image as possible, e.g., if the far corner of an image is chosen, the center of the cropped image will be nearer that point than the image’s center, but not that exact point.
- The chosen focal point for the image will be the focal point for all instances on the site where that image appears. The focal point is per image, not per instance.
Example #1 of Focal Point in general use

In this example, the editor has chosen a horizontal image and moved the “+” from the center of the image over into the right side of the image.

If the image needed is a square, then the image will be displayed on the page as a square. However, with Focal Point, the editor is not required to upload a square image.

The help text for the media field reads:
- Please use an image with dimensions of at least 350x350px. The image can be horizontal, vertical, or square.

Without Focal Point cropping, the image would have been cropped equally on either side, cutting off a majority of the subject.
Example #2 of Focal Point in use (Hero image example)

In this example, the editor has chosen an image for a hero image and moved the “+” from the center of the image over into the right side of the image.

The hero image will be displayed on desktop horizontally, very similar to what is seen here, which doesn’t make use of the chosen point.

On mobile devices however, it’s possible that choosing a focal point could allow a cropped version of the image to stay focused on the subject. (Note that this would depend on the designs; the image may remain horizontal in mobile devices.)

Without Focal Point cropping, the image would be cropped equally on either side, cutting off the subject almost entirely.
Custom block library

Blocks in the block library belong to Custom block types, each with its own fields and display settings. After creating a block, place it in a region from BLOCKS.

Add custom block

Block description
Block type

Apply

<table>
<thead>
<tr>
<th>BLOCK DESCRIPTION</th>
<th>BLOCK TYPE</th>
<th>UPDATED</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Footer Content Block</td>
<td>Footer Content Block</td>
<td>11/28/2018 - 12:47</td>
<td>Edit</td>
</tr>
<tr>
<td>Global Footer CTA Block</td>
<td>Footer CTA Block</td>
<td>10/23/2018 - 10:16</td>
<td>Edit</td>
</tr>
<tr>
<td>Global Header CTA Block</td>
<td>Header CTA Block</td>
<td>07/30/2018 - 15:00</td>
<td>Edit</td>
</tr>
</tbody>
</table>
• Go to Manage > Structure > Block Layout > Custom Block Library in the CMS menu to get to the Block Menu
Here you’ll see a list of all Blocks.

To edit content in any of the blocks, click “Edit.”
Each menu has a corresponding block that is managed on the Block layout page.

<table>
<thead>
<tr>
<th>TITLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Administrative task links</td>
</tr>
<tr>
<td>Development</td>
<td>Links related to Devel module.</td>
</tr>
<tr>
<td>Footer</td>
<td>Site information links</td>
</tr>
<tr>
<td>Main Menu</td>
<td></td>
</tr>
<tr>
<td>Tools</td>
<td>User tool links, often added by modules</td>
</tr>
<tr>
<td>User account menu</td>
<td>Links related to the active user account</td>
</tr>
<tr>
<td>Utility Menu</td>
<td></td>
</tr>
</tbody>
</table>
Go to Manage > Structure > Menus in the CMS menu to get to the list of Menus available.
TAXONOMIES

Taxonomy

Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms:

- Add vocabulary

<table>
<thead>
<tr>
<th>VOCABULARY NAME</th>
<th>DESCRIPTION</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Campus</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Event Topic</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Media Tag</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ News Main Category</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ News Topic Category</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Program Degree</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Program Format</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Story Topic</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>+ Story Type</td>
<td></td>
<td>List terms</td>
</tr>
</tbody>
</table>
Go to Manage > Structure > Taxonomy in the CMS menu to get to the Taxonomy Menu
Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms "Apple" and "Banana".

- On click of “Taxonomy”, you’ll see a list of all Taxonomies.
- To see all terms in a Taxonomy, click “List Terms”

<table>
<thead>
<tr>
<th>Vocabulary name</th>
<th>Description</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area of Interest</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Availability</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Media Tag</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Redirect Type</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Resource Type</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Result Type</td>
<td></td>
<td>List terms</td>
</tr>
<tr>
<td>Technical Area</td>
<td></td>
<td>List terms</td>
</tr>
</tbody>
</table>

Save
On the page of a taxonomy, you can see all terms currently in that taxonomy.

To add a new term to the taxonomy, click “Add Term”.

To edit an existing term, click “edit” on the term you wish to edit.

To delete a term, click the dropdown arrow next to “Edit”, then click, “Delete”.

### Technical Area

<table>
<thead>
<tr>
<th>Name</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Resource Laboratories</td>
<td>Edit</td>
</tr>
<tr>
<td>Cellular &amp; Molecular Research</td>
<td>Edit</td>
</tr>
<tr>
<td>Radiation</td>
<td>Edit</td>
</tr>
<tr>
<td>Drug Discovery</td>
<td>Edit</td>
</tr>
<tr>
<td>Cytometry</td>
<td>Edit</td>
</tr>
</tbody>
</table>
Enter/edit the Term’s name.
Enter any additional fields for the term.
Click “Save”.

Add term

Edit term

Name
Research
Alert

OHO Alert Configuration

Enable alert message
Checking this box will cause the alert message to display at the top of all pages on the site.

Alert message type
- Notice
Adds a type indicator to the alert message.

Alert message

"All you really need is love, but a little chocolate now and then doesn't hurt." Lucy van Pelt

Button

Text format
- Full HTML

Save configuration
- Go to Manage > Configuration > System > OHO Alert in the CMS menu to get to the site alert.
- /admin/config/system/oho_alert
Published

_Last saved:_ 03/15/2019 – 10:58

_Author:_ devtest

- Create new revision
  Revisions are required.

Revision log message

Briefly describe the changes you have made.

- MENU SETTINGS
- METATAGS
Introduction

All pages you create will have at least some Meta fields for entering information that aren’t visible, but will affect the page. These can be found on the right side of any page in the CMS.
**Menu Settings**

- **Provide a Menu Link**
  - Determines whether this page has a menu

- **Menu Link Title**
  - The title of this page that will appear in menus/navigational elements.

- **Description**
  - Shown when the user hovers their mouse over a menu link to this page

- **Parent Item**
  - Choose the page you would like this page to be a child of.
    - If left empty, this defaults to the highest level page.
    - Menu items in this list are grouped by menu. Menu names are indicated with “<>” (e.g. <Main Menu>)

- **Weight**
  - Determines where in a navigation this page appears.
    - If all weights are equal, they will order alphabetically.
  - Note: It is recommended to manage menu weight in the navigation administration.
Meta Tags

- **Page Title**
  - Determines page name for the browser and search engines.
  - By default, contains “[node:title] | [site:name]” which will format to e.g. “Athletics | Your University”, pulling from the title field for the page.
  - For SEO purposes, the title should not be longer than 75 characters.

- **Description aka Meta Description**
  - Determines the summary shown by search engines.
  - By default, contains [node:summary] which is usually the summary, intro text, or cropped body of the page.
  - For SEO purposes, the meta description should not exceed 165 characters, otherwise it becomes truncated in search engine results.
URL Custom Paths

If you would like a different URL pattern for a page or subsection:

1. Navigate to the page, edit view.
2. On the right, there will be a section called “URL Alias”
3. Unselect the box that says “Generate automatic URL alias”
4. Type in what you want the new path to be.

From there, anything that you create under that page, should automatically generate the URL alias in according with what you’ve updated.

1. If you updated to [root]/newpage all subpages should follow the formula of “[root]/newpage/newpagechild1”
2. If you change a page URL, you need to re-save subpages for their URLs to get the update.
3. For some special pages, the same should be true, but you may need to make sure the context condition matches this URL path.

Note: Our recommendation is to keep the vast majority of pages using their automatic URL alias that we’ve set up in the URL worksheet. Exceptions would include particular landing pages and other specialty pages. If you need a marketing url for a page, create a redirect.*

* Subdomain redirects may be managed in your DNS by your IT team and on the server by the OHO Services team.
WYSIWYG Text Areas
Overview

WYSIWYG Text Area options may include:
- Full HTML (sometimes named “Body”)
- Basic HTML
- Simple HTML
- Plain

All text area types allow paragraph breaks.

All text areas have a toolbar with options to format the text, with the exception of the Plain text area. See this slide for visual.

Helpful Tip:
We highly recommend adding styles after the content has been added. Styles can carry into the next paragraph once applied, and that may not be desired.

The various text area options with a toolbar include more or fewer toolbar options, depending on the text area type. See this slide to identify toolbar options.

- **Full HTML** - See this slide for a list of included options and a visual.
- **Basic HTML** - Option to bold, italicize, underline, and link text, to create bulleted and numbered lists, and potentially to add button styles or other styles to links or text.
- **Simple HTML** - Option to bold, italicize, and link text.
Text formats determine what is allowed within a WYSIWYG area and as a result what toolbar is displayed.

The ability to change text formats is only available for higher access users.
Selected text can be made bold, italicized, underlined, or with a strikethrough.

Add superscript or subscript content.

Remove formatting.

Add or remove link from selected text. (Note that text must be a link before the Button style can be applied.)

Create a bullet or number list.

Create a table.

Selected text gets the Block Quote style applied.

Opens the Media module to upload, filter, and place media. See the Media Library section.

Selected text can be given a Heading. Headers are also important for SEO, so make sure your being mindful of using keywords when relevant.

Selected link text (must be a link) can be given a predefined style such as "Button,"

Toggle between viewing WYSIWYG content and its Source.
Full HTML text area options include:

- Normal text
- Bold, italicized, underlined, strikethrough
- Superscript, subscript
- Linked text
- Bulleted list
- Numbered list
- Tables (optional header row, header column, both, or none)
- Block quote
- Horizontal line
- Media - Images (centered, left-aligned, right-aligned) with optional captions, Videos, Document (as link)
- Headings (H2-H6)
- Styles

All WYSIWYG elements are optional
Filter URLs
Filter URLs

When logged in to the site, the “Currently Selected Filters URL” will be visible and available to copy.

**Purpose and Use:**
An editor may want to create a link to a filtered view of a listing from another page in the site. However, when a listing is filtered, the URL that appears in the browser address bar **may not include the filter parameters**; it may remain the same, e.g., “/news-events/events”.

The editor can filter the listing as desired and then **copy the “Currently Selected Filters URL”** (e.g., /news-events/events?topic=171). This can be pasted directly into a URL field that allows for an internal path, as seen in the example screenshot to the right.

*See the next slide for a view of the “Currently Selected Filters URL” in context.*

This Filter URLs feature is **only visible** to a user that is logged in. The typical site user will never see this feature.
### Filter URLs

**Scenario**
- User is logged in.
- A filter is applied to the listing page.
- The “Currently Selected Filters URL” will be available to copy.

- **View of the “Currently Selected Filters URL” feature in context on a listing page**
Link Fields

Link fields are unique fields that allow linking to internal pages or external pages. These fields also have the following optional attributes:

**Target**
The primary purpose of a target is to determine if a link should open in a new window.

**Rel**
The primary purpose of the rel attribute is to tell a search engine not to visit a link when crawling the site.

A full list of values is available here: [https://www.w3schools.com/tags/att_a_rel.asp](https://www.w3schools.com/tags/att_a_rel.asp)

**Aria Label**
Used to define text that labels the link for assistive devices. In most cases this will not be needed as accessible text has already been accounted for by the Drupal theme.
Redirects
Redirects

- Go to Manage → Configuration → Search & Metadata → Redirects

### Redirect

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Status code</th>
<th>Original language</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>- Any -</td>
<td>- Any -</td>
</tr>
</tbody>
</table>

[+ Add redirect]

[Filter]
Adding a Redirect

- Add value for **Path** (e.g. /getstarted). This is where you want to redirect the visitor from.
  - Note: Add the path without a preceding slash; the slash is already included by default
- Add a value for **To** (e.g. /admissions/apply-now)
- Set the **Redirect status**, it should default to 301 Moved Permanently.
TABLE OF CONTENTS
Final Cores Wireframes  Final Research Wireframes

Unique Page Templates
1. Research Cores Directory
2. Core/Facility Detail
3. Offering Detail
4. Homepage
5. General
6. Resource Node
7. Resource Directory
8. Center/Institute Node
9. Center/Institute Listing
10. Announcement Detail
11. Announcement Listing

Recurring Components
1. Announcement Feature
2. Additional Resources
3. Body Section
4. Checkerboard
5. Featured Media Gallery
6. News Feature
7. Promo Banner
8. Listing Intro

Subcomponents
1. Callout Block
2. Component Heading
3. Text Area - Full HTML (WYSIWYG)

Taxonomies
1. Taxonomies

Navigation
1. Header
2. Sock & Footer
3. Section Navigation
4. Breadcrumbs
5. On-page Sticky Navigation
6. Sitewide Alerts
7. Privacy Policy
8. Pagination
ANNOTATIONS EXAMPLE
The following slides demonstrate how the annotations fields in the following orange slides translate to the fields in Drupal.
SITE

1440 x 800

TEST LANDING PAGE

ANNOTATION

Fields Needed

- Hero Image
  - Image upload (.jpg or .png)

- Title field*
  - Plain text

- Eyebrow Heading
  - Plain text

Auto Generated By CMS (Not Editable)

- Breadcrumbs

CMS (SAMPLE)

Title *
Test Landing Page

Eyebrow Heading

Eyebrow Heading
SITE

1440 x 800

TEST LANDING PAGE

ANNOTATION

Fields Needed
- Hero Image
  - Image upload (.jpg or .png)
- Title field
  - Plain text
- Eyebrow Heading
  - Plain text

Auto Generated By CMS (Not Editable)
- Breadcrumbs

CMS (SAMPLE)

Title *
Test Landing Page

Eyebrow Heading
Eyebrow Heading
SITE

1440 x 800

TEST LANDING PAGE

ANNOTATION

Fields Needed
- Hero Image
  - Image upload (.jpg or .png)
- Title field*
  - Plain text
- Eyebrow Heading
  - Plain text

Auto Generated By CMS (Not Editable)
- Breadcrumbs

CMS (SAMPLE)

Title *
- Test Landing Page

Eyebrow Heading
- Eyebrow Heading
UNIQUE PAGE TEMPLATES
Research Cores Directory

Search for the resources you need to answer your research questions.
Overview
Presents Yale’s Research Cores in a dynamic listing, with smart filtering and clear design in order to help users find the resources they’re looking for as easily as possible.

Page Elements
1. Header ★
2. Breadcrumbs ★
3. Hero Area ★
4. Search & Filters ★
5. Listing Area ★
6. Pagination ★
7. Sock & Footer ★

Key
Unique to this page  Recurring Component  Navigation  Subcomponents
Overview
Introduces the directory with a clear page title and draws users into the search with engaging media.

Field Definitions
- Page Title ★ (i.e., “Cores Directory”)
  - [Text Field - Plain]
- Hero Image ★
  - [Image upload (.png or .jpg)]
  - Note: Hero image background design (seen at left, subtle, dark blue geometric) will be provided for upload.
Filter Elements

- Filters (AND between, OR within; see next slide)
  - Text Search
    - Name
    - Hidden Result Name for SEO & Sorting
    - Summary
    - Search Keywords
  - Result Type (multi-select)
  - Technical Area (multi-select)
  - Availability (single-select)
    - The “Available to External Researchers” checkbox includes ONLY results that have been assigned the “Available to Yale researchers & external researchers” Availability taxonomy term.

Field Definitions for Text Search
(see Text Search features on next slide)

- Text Search prompt ★ (i.e., “Search for the resources you need...”)
  - Text Field - Plain
- Search Suggestion Terms [max 5] ★
  - Text Field - Plain
  - Help Text: Enter each Search Suggestion Term in a new field.

Generated by the CMS

- Form elements (buttons, dropdowns, checkboxes)
- Icons (dropdown arrows, search icon)
- Filter labels:
  - "Search" (hidden, included for accessibility purposes)
  - "Filter by Result Type"
  - "Filter by Technique/Disciple" “…Filter by Technical Area”
  - "Available to Yale researchers & external researchers” “Available to External Researchers”
- Filter placeholder/default text:
  - "Search for the resources you need...” “Find facilities, instruments, equipment, services, and more...”
  - “All Research Areas” “All Technical Areas”
- Filter buttons:
  - “Search”
Filter Features Overview

- On page load, listing shows all result types (unless the user has been linked via a specific URL that has applied filters)
- Text search:
  - Autocomplete dropdown (type-ahead) shows search suggestions based on current text as text is entered
  - Search is executed on click of “Search” button or Enter on keyboard
  - On load, search field displays placeholder text generated by the CMS (text noted on previous slide). Then 5 seconds after the page has loaded, client-managed Search Suggestion Terms will “rotate” within the search field, 1 at a time (see mit.edu for an example), replacing the placeholder text. (see Field Definitions on previous slide)
- Result Type buttons act as checkboxes - multiple may be applied. They act as OR filters (i.e., if Core/Facility and Services are both selected, the results that display have been tagged with either Core/Facility OR Services).
- Technical Area filter will include its own “Submit Selections” and “Clear All Selections” links; the listing will not filter by Technical Area dropdown selection(s) until the user has selected the “Submit Selections” button within the dropdown (visual included on next slide)
- Listing will filter automatically after user chooses from the Result Type button selectors or the External Availability checkbox

“AND” and “OR”

Filters work together in the following ways:

- **AND** between each kind of filter
  - E.g., if a Result Type and a Technical Area is selected, results must match both selections.
- **OR** within each filter - Some filters allow for multiple selections within them (Result Type + Technical Area); selections within these will work together as OR.
  - E.g., if more than one Technical Area is selected, results just need to match one of the selected areas, but not all of them.

Not available in Release 1; will be available in Release 2.
Facet Filters

Overview
Facet filters will be shown within a dropdown in the filters section. The dropdown will allow scrolling in order to accommodate a significant number of dropdown options.

Generated by the CMS
- Form elements (checkboxes, button, link)
- "Submit Selections"
- "Clear All Selections"

Not available in Release 1; will be available in Release 2.
Facet Filters

Features of the Technical Area Facet Filters

- Technical Area filter terms act as checkboxes - multiple may be applied. They act as OR (i.e., if Radiation and Clean Rooms are both selected, the results that display have been tagged with either Radiation OR Clean Room; they do not need to be tagged with both).
- Number of matching results for each facet “(X)” will be shown inline with each facet label, i.e.: “Animal Resource Laboratories (X)”
  - X appears on page load; updates dynamically as other filter criteria are applied or cleared.
  - X includes only displayed (published) items.
- Technical Area terms will appear hierarchically within filter dropdown, with Level 1 taxonomy terms acting as “parent” terms to Level 2 taxonomy terms (see included visual for representative example).
- Both Level 1 and Level 2 Technical Area taxonomy term sets should display in A-Z order
- Selecting & deseleting
  - Checkbox states include: checked, unchecked, or indeterminate
  - If the user selects a “Parent” term, all “Children” below it will be selected as well
  - If the user deselects a “Child” under a “Parent” term, the “Parent” term will deselect as well (but other “Children” if there are any, will remain checked)
  - If the user selects all “Children” underneath a “Parent”, the “Parent” will be selected automatically
**Listing Features**

- Content from both Core/Facility Details and Offering Details will display in the listing
  - All items display in the listing by default/on page load
- Items Per Page: 12
- Sorting:
  - On load: Core/Facility or Offering Name (A-Z) using the text from “Hidden Result Name for SEO and Sorting”
    - *Hidden Result Name for SEO and Sorting* can allow “Yale Center for Biomedical Data Science” to appear with results starting with “B” rather than with “Y”.
  - After search: Relevance (per Solr search weighting) is the primary sort; secondary sort is by “Hidden Result Name for SEO and Sorting” text.
- No Results Behavior: “No results found matching your search.”

**Features / Generated by the CMS**

- “X Results Found” where X is the number of Core/Facility and Offering results.
  - “X Results Found” displays on load, prior to search execution
- “Active Filters”
- Active filter buttons with “X” to clear individual filters
- “Clear All Filters”
Research Cores Directory

Listing Items

Pulling from Core/Facility Detail
A. Featured Image
B. Result Type
C. Core/Facility Name (linked to Core/Facility Detail)
D. Summary
E. Contact Name
F. Contact Title(s)
G. Phone Number
H. Email
I. Schedule or Order Link (not shown in Design, but will display if available)
J. Featured Offerings

Pulling from Offering Detail
A. Featured Image
B. Result Type
C. Offering Name (linked to Offering Detail)
D. Summary
E. Contact Name
F. Contact Title(s)
G. Phone Number
H. Email
I. Schedule or Order Link
J. Parent Core/Facility (linked to Core/Facility Detail specified on Offering Detail page)

Features
- If no “Schedule or Order Link” is present on a given detail page, the “Schedule or Order Information” content DOES NOT pull into these cards; scheduling information is simply not displayed in this situation.

Generated by the CMS
- Icons
- “Located within” label (for Parent Core/Facility link displayed on Offering type results ONLY)
- “Featured Offerings” label (for Featured Offerings copy displayed on Core/Facility results ONLY)
Core/Facility Detail

Confocal Microscopy


Internal/external research availability differs across offerings

Olivia Walden, MA
Title of Contact

Schedule an appointment

Office Hours: Mon-Fri, 8a-5p
Building: Kent Hall, 2nd Floor
View on Campus Map
Overview
Introduces users to the capacity/offerings of a Core/Facility, including key contact information, available resources, and more.

Page Elements
1. Header ★
2. Breadcrumbs ★
3. Name & Result Information ★
4. Image & Result Type Assignment ★
5. Promo Banner
6. On-page Sticky Navigation ★
7. Body Section (a.k.a., Overview) ✦
8. Contacts Section (not shown in design visual) ✦
9. Rates Section ✦
10. Instruments/Equipment List ✦
11. Services List ✦
12. Checkerboard ✦
13. Featured Media Gallery (a.k.a. Photos/Videos) ✦
14. Additional Resources (a.k.a. Resources & Guidelines) ✦
15. Related Cores/Facilities ★
16. Sock & Footer ★

Key
Unique to this page  Recurring Component  Navigation  Subcomponents

✦ = included in the On-page Sticky Navigation
★ = required element on the page
Optional Components Area

Each component is:
● Optional

Available Components
● Promo Banner
● Body Section
● Instruments/Equipment List
● Services List
● Contacts Section
● Checkerboard
● Featured Media Gallery
● Additional Resources
Overview
Introduces a Core/Facility alongside valuable context, including Technical Area tags, a summary, availability status, and a CTA to the external site, as well as additional information such as contact, scheduling, and hours.

Confocal Microscopy


Internal/external research availability differs across offerings

#imaging  #microscopy

Core Website

Olivia Walden, MA
Title of Contact
104-820-7243
eowalden@yaleresearch.edu

Request Services or Equipment Access
Schedule via [software]

Hours & Location
Office Hours: Mon-Fri, 8-6
Building: Kent Hall, 2nd Floor
View on Campus Map
Confocal Microscopy


Internal/external research availability differs across offerings
Microscopy

adipiscing elit. Curabitur eget iaculis quam, em elit, sodales accumsan risus accumsan ac. dignissim, lobortis massa nec, mollis dui. In urna lectus consectetur eros.

across offerings

<table>
<thead>
<tr>
<th>Field Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Information ★</td>
</tr>
<tr>
<td>Contact Name ★ (may include level of education)</td>
</tr>
<tr>
<td>Text Field - Plain</td>
</tr>
<tr>
<td>Contact Titles [no max]</td>
</tr>
<tr>
<td>Text Field - Plain</td>
</tr>
<tr>
<td>Phone Number</td>
</tr>
<tr>
<td>Phone Number</td>
</tr>
<tr>
<td>Help Text: If you do not include a phone number, you must include an email address.</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Help Text: If you do not include an email address, you must include a phone number.</td>
</tr>
<tr>
<td>Schedule or Order Link (e.g., “Schedule via [Software]”)</td>
</tr>
<tr>
<td>Title + URL Field</td>
</tr>
<tr>
<td>Schedule or Order Information</td>
</tr>
<tr>
<td>Text Area - Simple HTML</td>
</tr>
<tr>
<td>Hours &amp; Location</td>
</tr>
<tr>
<td>Office Hours</td>
</tr>
<tr>
<td>Text Area - Simple HTML</td>
</tr>
<tr>
<td>Building</td>
</tr>
<tr>
<td>Text Field - Plain</td>
</tr>
<tr>
<td>Campus Map Link</td>
</tr>
<tr>
<td>URL Field</td>
</tr>
</tbody>
</table>
Microscopy

adipiscing elit. Curabitur eget iaculis quam, em elit, sodales accumsan risus accumsan ac. dignissim, lobortis massa nec, mollis dui. In urna lectus consectetur eros.

across offerings

Olivia Walden, MA
Title of Contact:
104-829-7243
owalden@yaleresearch.edu

Request Services or Equipment Access
Schedule or order information in a Simple HTML text area here under the Schedule or Order label.

Office Hours:
mon 1-2
tue 3-4
Buildings: Kent Hall, 2nd Floor
View on Campus Map

Generated by the CMS

● Labels
  ○ “Request Services or Equipment Access”
    (previously, “Schedule or Order”)
  ○ “Hours & Location”
  ○ “Office Hours:”
  ○ “Building:”
  ○ “View on Campus Map” Campus Map Link title

● Icons
  ● If “Schedule or Order Link” is not filled in, the following text displays: “Software varies per offering. Visit this Core/Facility’s external site for collaboration information.”

Features

● Contact Titles will stack in a vertical list under Contact Name
Confocal Microscopy


Internal/external research availability differs across offerings

Olivias Walden, MA
Title of Contact
104-825-7343
owalden@yaleresearch.edu

Request Services or Equipment Access
Schedule via (software)

Hours & Location
Office Hours: Mon-Fri (8-5)
Building: East Hall, 3rd Floor
View on Campus Map

Field Definitions

- Featured Image
  - Image upload (.png or .jpg)
- Result Type [max 1]
  - Term Select - Result Type
    - Note: Only the "Core/Facility" term will be presented as a valid option, and it will always be selected.
- Core/Facility Location (i.e., "Yale Center for Molecular Imaging")
  - Title + URL Field

Generated by the CMS

- Result Type taxonomy term is assigned automatically as: Core/Facility
  - This term prints automatically in front of the "Core/Facility Location" link.
  - This page can be automatically tagged because all of the Core/Facility Detail pages will be of this Result Type (unlike Offerings which could be one of two different Result Types)
Contacts
Description of this section. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Scheduling Assistance
Help with booking time to visit the Department of Zebrafish or reserving cell lines.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Role</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ursula Pagne, PhD</td>
<td>852-748-8023</td>
<td>1. Email</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:upagne@yaleresearch.edu">upagne@yaleresearch.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

Contact Role
Description of training contact assistance dolor sit amet, consectetur adipiscing elit, sed do.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Role</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benjimen Corey, MA</td>
<td>267-623-8934</td>
<td>1. Text Field - Plain</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:bcorey@yaleresearch.edu">bcorey@yaleresearch.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

Contact Role
Description of training contact assistance dolor sit amet, consectetur adipiscing elit, sed do.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Role</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annie Daly, MA</td>
<td>632-522-3672</td>
<td>1. Contact Phone Number</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:adaly@yaleresearch.edu">adaly@yaleresearch.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

Overview
Row-based component used to organize contact information (i.e., scheduling assistance for a facility)

Optional Callout
Blue shark swordtail zebra pleco bigeye, pencilsmelt, daggershot pike conger, yellow-and-black triplefin dogfish shark sand.

Optional Callout Block
Generated by the CMS
- On-page Navigation Name: “Contacts” (this is also used as the visible component title)
  - See annotations for On-Page Sticky Navigation

Field Definitions
- Description
  - Text Area - Simple HTML
- Contact Items [no max] ★
  - Service Title ★
    - Text Field - Plain
  - Service Description
    - Text Area - Plain Text
  - Contact Information ★
    - Contact Name ★ (may include level of education)
      1. Text Field - Plain
    - Contact Titles [no max]
      1. Text Field - Plain
    - Contact Phone Number
      1. Phone Number
    - Contact Email ★
      1. Email
Overview
Provides a flexible means of presenting rate information, including formatted text and modular table options.

Field Definitions
- Rates ★ (e.g., all content under “Rates”)
  - Text Area - Tables
- Callout Block

Generated by the CMS
- On-page Navigation Name: “Rates” (this is also used as the visible component title)
  - See annotations for On-Page Sticky Navigation
Overview
Displays all instruments/equipment available to researchers through this Core/Facility.

Field Definitions
- Description (not pictured in wireframe screenshot)
- Text Area - Simple HTML

Features
- Automatically pulls in all Offerings that have BOTH:
  - Result Type taxonomy term assignment is “Instrument/Equipment”
  - The Offering’s selected node for “Parent Core/Facility” is this Core/Facility node
- Items are listed A-Z by “Hidden Result Name for SEO & Sorting”
- If there are no instruments/equipment to display, this component will not appear.

Pulling from Offering Detail
- Name (linked to Offering Detail page)
- Summary
- Availability
- Image

Generated by the CMS
- On-page Navigation Name: “Instruments/Equipment” (this is also used as the visible component title)
  - See annotations for On-Page Sticky Navigation
Overview
Displays all services available to researchers through this Core/Facility.

Field Definitions
- Description (not pictured in wireframe screenshot)
  - Text Area - Simple HTML

Features
- Automatically pulls in all Offerings that have BOTH:
  - Result Type taxonomy term assignment is “Services”
  - The Offering’s selected node for “Parent Core/Facility” is this Core/Facility node
- Items are listed A-Z by Hidden Name for SEO & Sorting
- If there are no services to display, this component will not appear.

Pulling from Offering Detail
- Name (linked to Offering Detail page)
- Summary
- Availability
- Image

Generated by the CMS
- On-page Navigation Name: “Services” (this is also used as the visible component title)
  - See annotations for On-Page Sticky Navigation
Overview
Promotes a selection of similar Cores/Facilities to encourage Core/Facility discovery and allow users to best select a Core/Facility most relevant to their needs.

Features
● Automatically pulls in up to 3 Cores/Facilities based on shared Technical Area (Level 2 only) (OR) taxonomy terms.
● If fewer than 3 Cores/Facilities sharing Technical Area (Level 2 only) terms are found (including 0), the remaining spaces will pull in Cores/Facilities based on shared Technical Area (Level 1 only) (OR) taxonomy terms.
● If no Cores/Facilities with shared Technical Area taxonomy terms exist, component does not appear.

Sorting
● Cards appear ordered A-Z by “Hidden Result Name for SEO & Sorting”
  ○ If there are Cores/Facilities displaying with shared Technical Area (Level 2) taxonomy terms AND also shared Technical Area (Level 1) taxonomy terms, the Level 2 set will display first, ordered A-Z, followed by Level 1, ordered A-Z.
Pulling from Core/Facility Detail

A. Featured Image
B. Result Type
C. Core/Facility Name (linked to Core/Facility Detail)
D. Summary
E. Contact Name
F. Contact Titles
G. Phone Number
H. Email
I. Schedule or Order Link
J. Featured Offerings

Generated by the CMS

- “Related Cores/Facilities” component title
- “More Related Cores/Facilities” (links to Research Cores Directory filtered by the Technical Area taxonomy terms assigned to this Core/Facility Detail page) Not available in Release 1; will be available in Release 2.
- “Featured Offerings” label
- Icons (TBD in Design: phone, email, clock)
Overview
Introduces users to information about a specific Offering from within a Core/Facility, including key contact information, context, procedural instruction, and more.

Page Elements
1. **Header ★**
2. **Breadcrumbs ★**
3. **Image & Result Type Assignment ★**
4. **Name & Result Information ★**
5. **Promo Banner**
6. **On-page Sticky Navigation ★**
7. **Body Section (a.k.a., Overview) ✦**
8. **Specifications Section ✦**
9. **Rates Section ✦**
10. **Expandable Section ✦**
11. **Training and Services Section ✦**
12. **Checkerboard ✦**
13. **Featured Media Gallery (a.k.a. Photos/Videos) ✦**
14. **Additional Resources (a.k.a. Resources & Guidelines) ✦**
15. **Related Offerings ★**
16. **Sock & Footer ★**

Key
- Unique to this page
- Recurring Component
- Navigation
- Subcomponents

✦ = included in the On-page Sticky Navigation
★ = required element on the page
Optional Components Area

Each component is:
- Optional

Available Components
- Promo Banner
- Body Section
- Specifications Section
- Rates Section
- Expandable Section
- Training and Services Section
- Checkerboard
- Featured Media Gallery
- Additional Resources
**Field Definitions**

- **Featured Image**
  - Image upload (.png or .jpg)

- **Result Type [max 1]**
  - Term Select - Result Type
  - Note: The term options are restricted. The "Core/Facility" Result Type term will not be presented as a valid option. All other terms will be presented for selection (e.g., "Services" and "Instrument/Equipment").

- **Parent Core/Facility [max 1]**
  - Node Select - Core/Facility

**Pulling from Core/Facility**

- Core/Facility Name (linked to Core/Facility Detail page)

**Generated by the CMS**

- “Core/Facility:" label for parent Core/Facility link
Overview
Introduces an Offering alongside valuable context, including Technical Area
tags, a summary, availability status, and a CTA to the external site, as well as
additional information such as contact, scheduling, and hours.

Leica SP5 Confocal Microscope

Summary about function ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
tempor incididunt ut labore et dolore magna aliqua. Odio facilisis mauris sit amet massa vitae
tortor condimentum lacinia. Voluptat diam ut venenatis tellus in metus vulputate. Cursus sit amet
dictum sit amet justo donec enim diam.

Available to External Researchers

Richard Price, PhD
Director
662-915-5970
rprice@yaleresearch.edu

Request Services or Equipment Access
Schedule via [Software]

Hours & Location
Office Hours  Monday-Thu, 9-5
Building  Buyers Hall, 4th Floor
View on Campus Map
Leica SP5 Confocal Microscope


Available to External Researchers

Field Definitions

- **Name** (i.e., “Leica SP5 Confocal Microscope”)
  - Text Field - Plain
- **Hidden Result Name for SEO & Sorting**
  - Text Field - Plain
  - Help Text: As an example, “Yale Center for Biomedical Data Science” should include a Hidden Result Name of “Biomedical Data Science” to facilitate focus-driven sorting.
- **Technical Areas [max 5]** (links to the Research Cores Directory filtered by term)
  - Term Select - Technical Area
- **Search Keywords [no max]** (do not display; used only for search & sorting purposes)
  - Text Field - Plain Text
  - Help Text: Enter each Search Keyword in a new field.
- **Availability [max 1]**
  - Term Select - Availability
- **External URL**
  - URL Field

Generated by the CMS

- “Core Website” text for the External URL button
- Icon (external site)
**Field Definitions**

- **Contact Information ★**
  - **Contact Name ★ (may include level of education)**
    - i. Text Field - Plain
    - ii. Help Text: This can be a name or a label for general contact, such as a Department name.
  - **Contact Titles [no max]**
    - i. Text Field - Plain
  - **Phone Number**
    - i. Phone Number
    - ii. Help Text: If you do not include a phone number, you must include an email address.
  - **Email**
    - i. Email
    - ii. Help Text: If you do not include an email address, you must include a phone number.
- **Schedule or Order Link** (e.g., “Schedule via [Software]”)
  - Title + URL Field
- **Schedule or Order Information**
  - Text Area - Simple HTML
- **Hours & Location**
  - **Office Hours**
    - Text Area - Simple HTML
  - **Building**
    - Text Field - Plain
  - **Campus Map Link**
    - URL Field
Richard Price, PhD
Director
📞 662-915-5970
✉️ rprice@valeresearch.edu

Request Services or Equipment Access
Schedule via [Software]

Hours & Location
Office Hours  Monday-Thu, 9-5
Building  Buyers Hall, 4th Floor
View on Campus Map

Olivia Walden, MA
Title of Contact
Another Title
One last possible title
📞 104-829-7243
✉️ owalden@valeresearch.edu

Generated by the CMS
● Labels
  ○ “Request Services or Equipment Access” (previously, “Schedule or Order”)
  ○ “Hours & Location”
  ○ “Office Hours”
  ○ “Building”
  ○ “View on Campus Map” Campus Map Link title

● Icons
  ● If “Schedule or Order Link” is not filled in, the following text displays: “Visit the Core/Facility’s external site for collaboration information.”

Features
● Contact Titles will stack in a vertical list under Contact Name
Overview
Provides a flexible means of presenting specification information, including formatted text and modular table options.

Field Definitions
- Specifications ★ (e.g., all content under “Specifications”)
  - Text Area - Tables
- Callout Block

Generated by the CMS
- On-page Navigation Name: “Specifications” (this is also used as the visible component title)
  - See annotations for On-Page Sticky Navigation

### Specifications
(Formatted Text Area, Tables)

<table>
<thead>
<tr>
<th>Column Label</th>
<th>Column Label</th>
<th>Column Label</th>
<th>Column Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Cameroon</td>
<td>Bahamas</td>
<td>China</td>
</tr>
<tr>
<td>B</td>
<td>Egypt</td>
<td>Costa Rica</td>
<td>India</td>
</tr>
<tr>
<td>C</td>
<td>Ethiopia</td>
<td>El Salvador</td>
<td>Israel</td>
</tr>
<tr>
<td>D</td>
<td>Morocco</td>
<td>Mexico</td>
<td>Japan</td>
</tr>
<tr>
<td>E</td>
<td>Nigeria</td>
<td>United States</td>
<td>South Korea</td>
</tr>
</tbody>
</table>

Optional Callout
Blue shark, swordfish, zebra pleco, bigeye, penclanarian, daggershark pike, kangas, yellow and black triple fin dogfish, shark sand.
Overview
Provides a flexible means of presenting rate information, including formatted text and modular table options.

Field Definitions
- **Rates** *(e.g., all content under “Rates”)*
  - Text Area - Tables
- **Callout Block**

Generated by the CMS
- On-page Navigation Name: “Rates” *(this is also used as the visible component title)*
  - See annotations for On-Page Sticky Navigation
Overview
Flexible accordion component including a custom title field.

Field Definitions
- **Title ★**
  - Text Field - Plain
  - Note: The "Title" field from this is used as this component's On-page Navigation Name
- **Description**
  - Text Area - Tables
- **Expandable Items [no max]**
  - **Title ★**
    - Body ★
    - Text Area - Basic HTML
- **Callout Block**

Generated by the CMS
- On-page Navigation Name: "[Copy entered in Title field]"
  - See annotations for On-Page Sticky Navigation
Training and Services Section

Overview
Row-based component used to organize contact information for 1 or more distinct services (i.e., training for microscope usage)

Field Definitions
- **Description**
  - Text Area - Simple HTML
- **Service & Contact Items [no max]**
  - **Service Title**
  - **Service Description**
  - **Text Area - Plain Text**
  - **Contact Information**
    - **Contact Name** (may include level of education)
      - Text Field - Plain
    - **Contact Titles [no max]**
      - Text Field - Plain
    - **Contact Phone Number**
      - Phone Number
    - **Contact Email**
      - Email

- **Callout Block**
  - Generated by the CMS
    - On-page Navigation Name: “Training & Services” (this is also used as the visible component title)
      - See annotations for On-Page Sticky Navigation

- **Features**
  - Contact Titles will stack in a vertical list under Contact Name
### Overview
Promotes a selection of similar Offerings to encourage Offering discovery and allow users to best select a Offering most relevant to their needs.

### Features
- Automatically pulls in up to 3 Offerings based on shared Technical Area (Level 2 only) (OR) taxonomy terms.
- If fewer than 3 Offerings sharing Technical Area (Level 2 only) terms are found (including 0), the remaining spaces will pull in Offerings based on shared Technical Area (Level 1 only) (OR) taxonomy terms.
- If no Offerings with shared Technical Area taxonomy terms exist, component does not appear.

### Sorting
- Cards appear ordered A-Z by “Hidden Result Name for SEO & Sorting” content
  - If there are Offerings displaying with shared Technical Area (Level 2) taxonomy terms AND also shared Technical Area (Level 1) taxonomy terms, the Level 2 set will display first, ordered A-Z, followed by Level 1, ordered A-Z.

### Generated by the CMS
- “Related Offerings” component title
- “More Related Offerings” (links to Research Cores Directory filtered by the Technical Area taxonomy terms assigned to this Offering Detail page) Not available in Release 1; will be available in Release 2.
- “Located within” label above the Parent Core/Facility
- Icons (TBD in Design: phone, email, clock)

### Pulling from Offering Detail
| A | Featured Image |
| B | Result Type |
| C | Offering Name (linked to Offering Detail) |
| D | Summary |
| E | Parent Core/Facility (linked to Core/Facility Detail specified on Offering Detail page) |
| F | Contact Name |
| G | Contact Title(s) |
| H | Phone Number |
| I | Email |
| J | Schedule or Order Link |
Poignant statement about Yale's commitment to research and innovation

Elaborate on statement above lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Mauris mattis nunc sed luctus.
Overview
Introduces users to Yale Research, including clear pathways to key resources, qualitative and quantitative storytelling elements, and featured news & announcements.

Page Elements
1. Header ★
2. Hero Area ★
3. Media & Testimonial Feature ★
4. Stats & Numbers Feature ★
5. News Feature ★
6. Announcement Feature ★
7. Sock & Footer ★

Key
Unique to this page  Recurring Component  Navigation  Subcomponents
Statement about Yale’s commitment to research

Field Definitions

- Hero Image ★
- Leading Statement ★ ("Statement about Yale's commitment..." in design; “Poignant statement” in wireframe)
  - Text Field - Plain
- Statement Summary (not displayed in design; appears below “Poignant statement” in wireframe)
  - Text Area - Simple HTML
- Research & Support Cards [max 2] ★
  - Image ★
    - png or .jpg upload
  - Title ★ (i.e., “Conduct Research”)
  - Summary ★
    - Text Field - Plain
  - CTA Button ★
    - Title + URL field
Field Definitions

- Component Heading★
- Media + Testimonial Slider [max 6]★
  - Media★
    - Image★
      1. .png or .jpg upload
    - Video★
      1. URL
    - Caption★
      1. Text Field - Simple HTML
  - Testimonial★
    - Title★ (i.e., “Breakthrough in Brain Imaging”)
      1. Text Field - Plain
    - Quote★
      1. Text Area - Plain
    - Person Name★
      1. Text Field - Plain
    - Title or Role★
      1. Text Field - Plain
  - Related Cores [max 5]★
    - Node Select - Core/Facility Detail

Pulling from Core/Facility Detail
- “Name” (linked to Core/Facility Detail page)

Features
- Video will be click-to-play, and will open in a lightbox on both desktop and mobile
Excellence at a Glance


<table>
<thead>
<tr>
<th>INFRASTRUCTURE ([INPUT])</th>
<th>RESULTS (OUTPUT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>85 Research Cores</td>
<td>93%</td>
</tr>
<tr>
<td>167 Centers &amp; Institutes</td>
<td></td>
</tr>
<tr>
<td>32 Laboratories</td>
<td>116</td>
</tr>
<tr>
<td>15 Schools &amp; Colleges</td>
<td></td>
</tr>
<tr>
<td>72 Entrepreneurial Student Groups</td>
<td>24+</td>
</tr>
</tbody>
</table>

Learn more about our approach Lorem ipsum.

Strategic Priorities

Field Definitions
- **Component Heading** ★ (i.e., "Infrastructure Inputs")
- **Infrastructure Section Label** ★ (i.e., "Infrastructure Inputs")
- **Infrastructure Data** [max 8] ★
  - **Number** ★ (i.e., "85")
    - Text Field - Plain
  - **Label** ★ (i.e., "Research Cores")
    - Text Field - Plain
  - **Label Link**
    - URL
    - Help Text: Add a URL if the label has associated or relevant content
- **Results Section Label** ★ (i.e., "Results Output")
- **Results Data** [max 4]
  - **Number** ★ (i.e., "93%")
    - Text Field - Plain
  - **Description**
    - Text Field - Simple HTML
  - **Link**
    - URL + Title Field
- **Strategic Priorities Statement** ★ (i.e., "Learn more about...")
- **Strategic Priorities CTA** ★
  - URL + Title Field
General Page Title

Description of this section. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Body Area

Page Area
Overview
A flexible, brand-aligned template that can accommodate many different content goals based on its range of component options.

Page Elements
1. Header ★
2. Hero Area ★
3. Breadcrumbs ★
4. Body Section (fixed)
5. Promo Banner
6. Checkerboards
7. Stats Feature
8. Cards Feature
9. Featured Media Gallery
10. Profile Feature
11. Body Section
12. News Feature
13. Announcement Feature
14. Webform Section
15. Section Navigation ★
16. Sock & Footer ★

Key
Unique to this page  Recurring Component  Navigation  Subcomponents
Flexible Components Area

Each component is:

- Reorderable
- Repeatable
- Optional

The flexible components area allows for unlimited components.

The area below the Promo Banner and above the Section Navigation is built using the following components placed in any order.

**Available Components**

- Checkerboards
- Stats Feature
- Cards Feature
- Featured Media Gallery
- Profile Feature
- Body Section
- News Feature
- Announcement Feature
- Webform Section
Field Definitions

● Media
  ○ Image
    i. .png or .jpg upload
  ○ Video (autoplay, muted, ambient)
    i. URL
      ii. Help Text: If you include video, you must also upload an image to the “Image” field to serve as a poster image

● Page Title ★ (“General Page Title” in screenshot)
  ○ Text Field - Plain

● Intro Text
  ○ Text Field - Simple HTML

Generated by the CMS

● Play/pause icon (when video is used)
Field Definitions

- **Text Area - Full HTML (WYSIWYG)** ★
- **Callout Block**
Field Definitions

- **Component Heading**
- **Cards [max 4]**
  - Number ★
    - Text Field - Plain
  - Superscript (i.e., “th” in “5th” - not shown in screenshot)
    - Text Field - Plain
  - Summary ★
    - Text Field - Simple HTML
  - Link
    - URL + Title Field
Cards Section


Card Title
Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur

Card Title
Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur

Field Definitions

- **Component Heading** ★
- **Cards [max 3]** ★
  - Image
    - .png or .jpg upload
  - Title ★
    - Text Field - Plain
  - Summary ★
    - Text Field - Simple HTML
  - Link
    - URL + Title Field
Profile Listings


John A Doe
Vice Provost for Research
203-432-6447
jdoe@yaleresearch.edu

Jane A Doe
Senior Associate Provost for Research Administration
203-765-3018
janea@yaleresearch.edu

Jane B Doe
Associate Provost for Research
203-4324447
janeb@yaleresearch.edu

Jane C Doe
Associate Provost for Research
203-785-2598
jane@yaleresearch.edu

Jane D Doe
Administrative Associate
203-432-4448
jane@yaleresearch.edu

Field Definitions

● **Component Heading ★**

● **Profile Cards [no max] ★**
  o Image ★
    i. .png or .jpg upload
  o Name ★
    i. Text Field - Plain
  o Link
    i. URL
    ii. Help Text: Use this field to link to more information for each profile on the Office of the Provost site
  o Title or Role [max 1] ★
    i. Text Field - Plain
  o Phone Number
    i. Phone Number Field
  o Email
    i. Email Field

Features

● Cards will display in rows of 3 (to be confirmed in design)
Overview
Used to create the form that intakes feedback on the “Website Feedback” page.

Field Definitions
- **Component Heading** ★
- **Webform Embed** ★
  - Webform entity select
  - Note: Webforms will be created using Drupal webform, and results will be stored in the back end.
Resource Node

6.0

Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Animal Care Training ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Animal Research ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Animal Research Policies ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Animal Research IACUC Review ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Appropriate Use of University Research Funds ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

Award Management ✎
Lorem ipsum dolor sit amet, consectetur adipiscing elit,
sed do eiusmod tempor quis nostrud.

email@yale.edu
### Field Definitions

- **Resource Title** *(i.e., “Academic Integrity”)*
  - Text Field - Plain

- **External Link**
  - URL

- **Hidden Result Name for SEO & Sorting**
  - Text Field - Plain
  - Help Text: As an example, “Yale Library: Policies” should include a Hidden Result Name of “Library Policies” to facilitate focus-driven sorting.

- **Resource Type(s) [max 4]**
  - Term Select - **Resource Type**
  - Help Text: If you select the Policies & Regulations term, you must also select a Policies & Regulations child term.

- **Summary**
  - Text Area - Plain Text

- **Availability [max 1]** *(does not display; used only for search & sorting purposes)*
  - Term Select - **Availability**

- **Search Keywords** *(do not display; used only for search & sorting purposes)*
  - Text Field - Plain Text

- **Phone Number**
  - Phone Number Field

- **Email**
  - Email Field

### Overview

The fields entered in this node directly populate the Resource Directory.

### Generated by the CMS

- External link icon
- Icons (phone, envelope)
Resources Directory

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Have a specific question? If you would like to get in touch with someone, reach out to vpr@yale.edu

Search by Name or Keyword

Find offices, policies, documents, and more...

Available to External Researchers

Filter by Resource Type

All Resource Types

167 RESULTS FOUND

Academic Integrity
Overview
Dynamic, filterable listing of all published resources (created via Resource Node entries).

Page Elements
1. **Header ★**
2. **Listing Intro ★**
3. **Search & Filters ★**
4. **Listing Area ★**
5. **Pagination ★**
6. **Sock & Footer ★**

Key
- **Unique to this page**
- **Recurring Component**
- **Navigation**
- **Subcomponents**
Filter Elements
- **Filters (AND)** (Learn about “AND” and “OR” filters on the following slide):
  - Search - fields searched:
    - Resource Title
    - Summary
    - Search Keywords
  - Resource Type (multi-select)
  - Availability (single-select)
    - The “Available to External Researchers” checkbox includes ONLY results that have been assigned the “Available to Yale researchers & external researchers” Availability taxonomy term.

Filter Features
- On page load, listing shows all resource types (unless the user has been linked via a specific URL that has applied filters)
- **Text search**:
  - Search is executed on click of “Search” button or Enter on keyboard
- **Resource Type** filter will include its own “Submit Selections” and “Clear Selections” links; the listing will not filter by Resource Type dropdown selection(s) until the user has selected the “Submit Search” button within the dropdown (visual included on next slide)
- Listing will filter automatically after user chooses from the External Availability checkbox
- Once listing has been filtered (via open search or filter), implemented filters will appear below the search area (above the listing) and may be removed individually OR all at once via a “Clear All” button (see visual on this slide)
“AND” and “OR” filter cooperation

Filters work together in the following ways:

- **AND** between each kind of filter
  - E.g., if a Resource Type and the Available to External Researchers checkbox are both selected, results must match both filters.

- **OR** within each filter - Some filters allow for multiple selections within them (Resource Type); selections within these will work together as **OR**.
  - E.g., if more than one Resource Type is selected, results only need to match one of the selected terms, not all of them.
Facet Filters will be shown within a dropdown in the filters section. The dropdown will allow scrolling in order to accommodate a significant number of dropdown options.

Generated by the CMS
- Form elements (checkboxes, button, link)
- "Submit Selections"
- "Clear All Selections"
Facet Filters

Features of the Resource Type Facet Filters

- Resource Type filter terms act as checkboxes - multiple may be applied. They act as OR (i.e., if Human Research and Software are both selected, the results that display have been tagged with either Human Research OR Software; they do not need to be tagged with both).
- Number of matching results for each facet “(X)” will be shown inline with each facet label, i.e.: “Human Research (X)”
  - X appears on page load; updates dynamically as other filter criteria are applied or cleared.
  - X includes only displayed (published) items.
- Resource Type terms will appear hierarchically within filter dropdown, with Level 1 taxonomy terms acting as “parent” terms to Level 2 taxonomy terms (see included visual left for representative example).
- Both Level 1 and Level 2 Resource Type taxonomy term sets should display in A-Z order
- Selecting & deselecting
  - Checkbox states include: checked, unchecked, or indeterminate
  - If the user selects a “Parent” term, all “Children” below it will be selected as well
  - If the user deselects a “Child” under a “Parent” term, the “Parent” term will deselect as well. Other “Children” if there are any, will remain checked
  - If the user selects all “Children” underneath a “Parent”, the “Parent” will be selected automatically
Listing Features

- All items display in the listing by default/on page load
- Letters will appear next to the first listing item with a “Hidden Result Name for SEO and Sorting” that begins with that letter.
- Sorting:
  - Name (A-Z) using the text from “Hidden Result Name for SEO and Sorting”
  - "Hidden Result Name for SEO and Sorting" can allow “Yale Library: Policies” to appear with results starting with “L” rather than with “Y”.
- Items Per Page: 15
- No Results Behavior: “No results found matching your search.”

Features / Generated by the CMS

- “X Results Found” where X is the number of results.
  - “X Results Found” displays on load, prior to search execution
- “Active Filters”
- Active filter buttons with “X” to clear individual filters
- “Clear All”
Pulling from Resource Node

A. Resource Title
B. Resource Type(s) (no link)
C. Summary
D. Phone Number
E. Email

Generated by the CMS

- Icons
<table>
<thead>
<tr>
<th>Center/Institute Name</th>
<th>Arts, Humanities &amp; Social Sciences</th>
<th>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center/Institute Name</td>
<td>Medical &amp; Health Sciences</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</td>
</tr>
<tr>
<td>Center/Institute Name</td>
<td>Science &amp; Engineering</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</td>
</tr>
<tr>
<td>Center/Institute Name</td>
<td>Arts, Humanities &amp; Social Sciences</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</td>
</tr>
<tr>
<td>Center/Institute Name</td>
<td>Science &amp; Engineering</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</td>
</tr>
<tr>
<td>Center/Institute Name</td>
<td>Science &amp; Engineering</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor quis nostrud.</td>
</tr>
</tbody>
</table>
Overview
The fields entered in this node directly populate the Center/Institute Listing.

Generated by the CMS
- External link icon

Field Definitions
- Center/Institute Name ★
  - Text Field - Plain
- External Link ★
  - URL
- Hidden Result Name for SEO & Sorting ★
  - Text Field - Plain
  - Help Text: As an example, “Yale Quantum Institute” should include a Hidden Result Name of “Quantum Institute” to facilitate focus-driven sorting.
- Area(s) of Interest [max 1] ★
  - Term Select - Area of Interest
- Summary ★
  - Text Area - Plain
- Search Keywords (do not display; used only for search & sorting purposes)
  - Text Field - Plain Text
  - Help Text: Enter each Search Keyword in a new field. All keywords should be targeted; a surplus of keywords will dilute search efficiency.
Center/Institute Listing

Research at Yale

Centers & Institutes

Yale is home to a number of renowned research centers, laboratories, and institutes that are pushing the boundaries of knowledge on topics ranging from autism to globalization.

Find a Center or Institute

Search by Name or Keyword

Find Centers & Institutes...

Search

Filter by Area of Interest

All Areas of Interest

91 RESULTS FOUND
Overview
Dynamic, filterable listing of all published centers and institutes (created via Center/Institute Node entries).

Page Elements
1. Header ★
2. Breadcrumbs ★
3. Listing Intro ★
4. Search & Filters ★
5. Listing Area ★
6. Pagination ★
7. Sock & Footer ★

Key
Unique to this page  Recurring Component  Navigation  Subcomponents
Generated by the CMS

- Form elements (buttons, dropdowns)
- Icons (dropdown arrows, search icon)
- Filter labels:
  - "Search by Name or Keyword"
  - "Filter by Area of Interest"
- Filter placeholder/default text:
  - "Find centers & institutes..."
  - "All Areas of Interest"
- Filter buttons:
  - "Search"

Filter Elements

- Filters (AND) [learn about "AND" and "OR" filters on this side]:
  - Search - fields searched:
    - Center/Institute Name
    - Summary
    - Search Keywords
  - Area of Interest (single-select)

Filter Features

- On page load, listing shows centers/institutes of all areas of interest (unless the user has been linked via a specific URL that has applied filters)
- Text search:
  - Search is executed on click of "Search" button or Enter on keyboard
- Area of Interest dropdown:
  - Listing will filter automatically after user chooses from Area of Interest dropdown
  - Area of Interest is a Facet which gives counter results
    - Number of matching results for each facet "(X)" will be shown inline with each facet label, i.e.: "Science & Engineering (X)"
    - X appears on page load; updates dynamically as other filter criteria are applied or cleared.
    - X includes only displayed (published) items.
- Once listing has been filtered (via open search or filter):
  - Page reloads and anchors user to the top of the results
  - Implemented filters will appear below the search area (above the listing) and may be removed individually OR all at once via a "Clear All" button [see active filters visual on this slide]
Listing Features

- All items display in the listing by default/on page load
- Letter – A starting letter will appear next to the first listing item in a set. (Sets are based on the 1st letter in the item’s “Hidden Result Name for SEO and Sorting”.)
- Sorting:
  - Resource Title (A-Z) using the text from “Hidden Result Name for SEO and Sorting”
    - Hidden Result Name for SEO and Sorting can allow “Yale Quantum Institute” to appear with results starting with “Q” rather than with “Y”.
- Items Per Page: 15
- No Results Behavior: “No results found matching your search.”

Features / Generated by the CMS

- “X Results Found” where X is the number of results.
  - “X Results Found” displays on load, prior to search execution
- “Active Filters”
- Active filter buttons with “X” to clear individual filters
- “Clear All Filters”
A Center/Institute Name

Medical & Health Sciences

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus dignissim faucibus enim, vel tincidunt mi tristique non.

Pulling from Center/Institute Node

A. Center/Institute Title (linked to "External Link" URL)
B. Area(s) of Interest (static, no link)
C. Summary

Generated by the CMS

● External link icon
Announcement Title

Description of this section. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation.

March 10, 2022

Body Area

Intro text. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation.

This is an H2

This is a WYSIWYG. You have the option to bold text, italicize text, and link text. Fusce id velit ut tortor pretium viverra. Nisi nunc nibh faucibus "vitae" aliquet.
Overview

A brand-aligned template that presents announcement content. Automatically populates the Announcement Listing.

Page Elements

1. Header ★
2. Breadcrumbs ★
3. Page Title & Intro ★
4. Body Section (fixed) ★
5. Sock & Footer ★

Key

Unique to this page    Recurring Component    Navigation    Subcomponents
Announcement Title

Description of this section. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Field Definitions

- Announcement Title ★ ("Announcement Title" in screenshot)
  - Text Field - Plain
- Summary
  - Text Field - Simple HTML
Body Area (WYSIWYG; formatted text, CTAs, media, lists, tables)

Intro text. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation.

This is intro text for this story. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

This is an H2

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
Announcement Listing

Announcements

- September 21, 2022
  Announcement Title
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

- August 17, 2022
  Announcement Title
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

- August 1, 2022
  Announcement Title
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

- July 26, 2022
  Long Announcement: Updated COVID-19 Guidance for Research During July
  Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
**Overview**
Dynamic, paginated listing of Announcement Detail content.

**Page Elements**
1. **Header ★**
2. **Listing Intro ★**
3. **Listing Area ★**
4. **Pagination ★**
5. **Sock & Footer ★**

**Key**
- Unique to this page
- Recurring Component
- Navigation
- Subcomponents
Listing Features

- Sorting:
  - On load: Publish Date (most recent to least recent)
- Items Per Page: 15
Announcement Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed quis accumsan turpis, accumsan nulla. Praesent tempus vulputate ex, sit amet lacinia erat vulputate nec
RECURRING COMPONENTS
<table>
<thead>
<tr>
<th>Recurring Components</th>
<th>Core/Facility Detail</th>
<th>Offering Detail</th>
<th>Homepage</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Resources</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Announcement Feature</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Body Section</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Checkerboard</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Featured Media Gallery</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>News Feature</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Promo Banner</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Additional Resources
Recurring Components

**Features**

- **Documents**
  - A download icon will automatically appear next to a downloadable item.
- **Links**
  - An external link icon will automatically appear next to a link that takes a user off of the .edu.
- **Downloads and links will appear by order of upload, regardless of the type.**

**Overview**

Presents linked resources including page links, downloads, and external links that provide supplemental information relevant to a Core/Facility or Offering.

**Field Definitions**

- **Resource Boxes [max 2]**
  - **Title**
    - Text Field - Plain
  - **Documents [no max]**
    - **Document**
      - Document Upload (.docx, .pdf, TBD)
    - **Description**
      - Text Field - Plain
  - **Resource Links [no max]**
    - **Resource Link**
      - Title + URL Field
    - **Description**
      - Text Field - Plain

**Generated by the CMS**

- **On-page Navigation name: “Resources & Guidelines”**
  - See annotations for [On-Page Sticky Navigation](#)
Announcement Feature
## Research Announcements

<table>
<thead>
<tr>
<th>Announcement Title</th>
<th>Announcement Title</th>
<th>Announcement Title</th>
</tr>
</thead>
</table>

### Pulling from Announcement Detail
- Announcement Title (links to Announcement Detail)
- Publish Date
- Summary or trimmed Body (add “…” if Body text is used and trimmed)

### Overview
Presents the 3 most recent announcements.

### Field Definitions
- Component Title ★ (i.e., “Recent Announcements”)
  - Text Field - Plain

### Features
- Pulls in the 3 most recently published announcements, ordered by Publish Date (most recent first)

### Generated by the CMS
- “All Announcements” (links to Announcements Listing page)
- Icon (calendar)
Body Section
Overview

Provides the ability to have a callout alongside the WYSIWYG in order to provide a pathway to a related, important user goal.

Field Definitions

- **Title ★ (e.g. “Overview”)**
  - Text Field - Plain
- **Body ★**
  - Text Area - Full HTML (WYSIWYG)
- **Callout Block**

Generated by the CMS

- On-page Navigation Name: “Overview”
  - See annotations for On-Page Sticky Navigation
Checkerboard
Recurring Components

Checkerboard

Overview
A flexible, multimedia way to showcase important and evergreen information.

Field Definitions
- **Component Heading**
- Checkerboard Items [no max]
  - Image ★
    - i. Image upload (.png or .jpg)
  - Caption
    - i. Text Area - Simple HTML
  - Title ★
    - i. Text Field - Plain
  - Description
    - i. Text Area - Basic HTML
  - CTA Button
    - i. Title + URL Field

Features
- If there are multiple checkerboard items, the media and text content layout alternates using CSS.

Generated by the CMS
- On-page Navigation Name: “[Copy entered in Component Heading’s Title field]”
  - See annotations for On-Page Sticky Navigation
Featured Media Gallery
Overview
Showcases a range of rich, multimedia content.

Field Definitions
- **Component Heading** ★
  - Gallery Items [no max] ★
    - Image ★
      - i. Image upload (.png or .jpg)
    - Video
      - i. Video
    - Title
      - i. Text Field - Plain
    - Title Link
      - i. URL Field
    - Caption
      - i. Text Area - Simple HTML

Generated by the CMS
- On-page Navigation name: “Photos/Videos”
  - See annotations for On-Page Sticky Navigation
- Slide Counter (i.e., “Current Slide # / Total # of Slides”)
- Play/pause icon (when video is used)

Features
- Video will be click-to-play, and will open in a lightbox on both desktop and mobile
Promo Banner
Optional promotion/alert section (new tool, training, closure, etc.)

Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.

Overview
Good for highlighting something important and time sensitive.

Field Definitions

- **Title** ★
  - Text Field - Plain
- **Description**
  - Text Area - Plain Text
- **Button [max 1]**
  - Title + URL Field
- **Document [max 1] (i.e., “Optional Download”)**
  - Document Title
    - Text Field - Plain
  - Document
    - Document upload (DOC and DOCX, PDF, XLS and XLSX, PPT and PPTX, CSV, JPEG, PNG)
News Feature
Recurring Components

News Feature

Overview
Presents noteworthy news articles from the Yale News site.

Field Definitions
- Component Title ★ (i.e., "Research in the News")
  - Text Field - Plain
- Yale News Link ★
  - Title + URL
  - Help Text: On site launch, use the Yale News homepage URL. Once Yale News incorporates a "Research" topic, update this URL to a view of news filtered by "Research"
- Large News Feature [max 1]
  - Image
    - .png or .jpg upload
  - Article Link ★
    - URL + Title Field
  - Summary ★
    - Text Field - Plain
  - Publish Date ★
    - Date Picker
- Small News Feature [max 3] ★
  - Article Link ★
    - URL + Title Field
  - Summary ★
    - Text Field - Plain
  - Publish Date ★
    - Date Picker

Generated by the CMS
- Icons (calendar, external link)
Example of News Feature using only Small items (no “Large” item):

Research in the News

- **Oct 10, 2022**
  - **Article Title Sit Dolor**
    - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus posuere vitae.

- **Oct 10, 2022**
  - **Article Title Sit Dolor**
    - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus posuere vitae.

- **Oct 10, 2022**
  - **Article Title Sit Dolor**
    - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus posuere vitae.
Listing Intro
Centers & Institutes

Yale is home to a number of renowned research centers, laboratories, and institutes that are pushing the boundaries of knowledge on topics ranging from autism to globalization.

Field Definitions

- Page Title ★ ("Centers & Institutes" in screenshot)
  - Text Field - Plain
- Intro Text
  - Text Area - Simple HTML
- Callout Block

Notes

- Built as a block, because views with facets must be their own pages.
Subcomponents

Confocal Microscopy

Summary about function ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud
exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure
dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Internal/external research availability differs across offerings.

Primary Contact
Clementine Fontaine, PhD
Director
892-722-2874
clfantine@yaleresearch.edu

Schedule or Order
Schedule via [Software]?

Hours & Location
Office Hours: Monday-Fri, 8-6
Building: Kent Hall, 2nd Floor
View Campus Map

Optional Callout
Blue shark swordtail zebra pasta, bigeye, pencilshrimp, daggershark, conger, yellow-and-black triplefin, dogfish shark sand.
Callout Block
Optional Call Out

Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.

Core Website

Field Definitions

- **Title**
  - Text Field - Plain
- **Body**
  - Text Area - Plain Text
- **Links [max 2]**
  - Title + URL Field
Component Heading
<table>
<thead>
<tr>
<th>Field Definitions</th>
<th>All Options Used</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Heading</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Optional Link</td>
</tr>
<tr>
<td><strong>Link</strong></td>
<td>Heading</td>
</tr>
</tbody>
</table>

- **No Link**
  - Heading

- **No Description**
  - Heading

- **Minimum**
  - Heading

**Used on:**
- Core/Facility Detail
- Offering Detail
- Homepage: Media & Testimonial Feature
- Homepage: Stats & Numbers Feature
- General: Stats Feature
- General: Cards Feature
- General: Profile Feature
- General: Webform Section

**Used in:**
- Checkerboard
- Featured Media Gallery

**Used in:**
- Core/Facility Detail
- Offering Detail
- Homepage: Media & Testimonial Feature
- Homepage: Stats & Numbers Feature
- General: Stats Feature
- General: Cards Feature
- General: Profile Feature
- General: Webform Section
Text Area - Full HTML (WYSIWYG)
Overview

These are the styles available to apply in the "Full HTML" WYSIWYG.

Available Styles

1. Intro Text
2. H2 - H6
3. Bold, Link, Italic text styles
4. Buttons, Download Links, External Links
5. Unordered and Ordered lists
6. Tables
Intro Text

Intro text. Thre spine stickleback Devario Antarctic cod muskellunge arrowtooth eel tiger shark walking catfish: duckbill gray mullet green swordtail. Dragonfish prickly shark.

H2 - H6

This is an H2

H3 Goes Here

H4 Goes Here

This is an H5

This is an H6

Overview

These are the styles available to apply in the “Full HTML” WYSIWYG.

Available Styles

1. Intro Text
2. H2 - H6
3. Bold, Link, Italic text styles
4. Buttons, Download Links, External Links
5. Unordered and Ordered lists
6. Tables

Bold, Link, Italic Text Styles

This is a WYSIWYG. You have the option to **bold text**, *italicize text*, and [link text]. Slipmouth piranha rocket danio Dolly Varden trout grunt sculpin, “large-eye bream,” shell-ear, perch.”
Overview
These are the styles available to apply in the “Full HTML” WYSIWYG.

Available Styles
1. Intro Text
2. H2 - H6
3. Bold, Link, Italic text styles
4. Buttons, Download Links, External Links
5. Unordered and Ordered lists
6. Tables
Overview
These are the styles available to apply in the “Full HTML” WYSIWYG.

Available Styles
1. Intro Text
2. H2 - H6
3. Bold, Link, Italic text styles
4. Buttons, Download Links, External Links
5. Unordered and Ordered lists
6. Tables
TAXONOMIES, BLOCKS, WRAPPER & NAVIGATION
Taxonomies
<table>
<thead>
<tr>
<th>Taxonomies</th>
<th>Research Cores Directory</th>
<th>Core/Facility Detail</th>
<th>Offering Detail</th>
<th>Resource Directory</th>
<th>Center/Institute Listing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Area</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Result Type</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Area of Interest</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Technical Area (2 levels of depth only)

- Animal Resource Laboratories
- Cellular & Molecular Research
  - Radiation
  - Drug Discovery
  - Cytometry
- Clean Rooms
- Clinical Services
- Computing, Informatics & Statistics
  - Computing Resources
  - Bio and Medical Informatics
  - Statistics
- Engineering & Design
- Histology & Pathology
  - Histology
  - Pathology
- Imaging
  - Cellular & Molecular Imaging
  - Medical Imaging
  - Nuclear Magnetic Resonance (NMR)
- Keck Biotechnology Resource Laboratories
  - Keck Genomic Services
  - Keck MS & Proteomics Services
  - Keck Biophysics Services
  - Keck Computation Services
- Physical Science Research
  - Chemical
  - Geological
  - Light Scattering
  - Interdisciplinary Physical Science
- Research Support Services

Technical Area, cont.

- Omics
  - Genomics
  - Proteomics

Result Type

- Core/Facility
- Instrument/Equipment
- Services

Availability

- Available to Yale researchers & external researchers
- Availability differs per offering
- Available to Yale researchers only

Technical Area Taxonomy Audit Spreadsheet
### Taxonomy for Resource Directory

**Resource Type (2 levels of depth only)**

- Animal Research
- Cores & Facilities
- Community Outreach & Entrepreneurship
- Computer Assistance & Data Security
- Clinical Trials
- Faculty Resources
- Funding, Awards & Grants
- Grievances
- Human Research
- Libraries, Archives & Databases
- Policies & Regulations
  - Confidentiality & Intellectual Property
  - HIPAA / NIH Policies & Compliance
  - Research Integrity
  - Animal Research
  - Clinical Trials
  - Data Security
  - Human Research
  - Environmental Policies
  - Entrepreneurship
  - Funding
  - Information Technology
  - Training & Certification
  - International Agreements
  - Diversity, Inclusion & Social Activism

### Resource Type, cont.

- Research Administration & Collaboration
- Research Agreements & Contracts
- Software
- Training

### Taxonomy for Center/Institute Listing

**Area of Interest (Center/Institute)**

- Arts, Humanities & Social Sciences
- Medical & Health Sciences
- Sciences & Engineering
Research at Yale

Header Elements

- Research at Yale (links to Homepage)
- Main navigation sections (labels only - see next slide for "child" links)
  - Conduct Research
  - Find Support
  - Learn More
- Utility Navigation
  - Yale University (shown left, links to Yale.edu)
  - Announcements
  - YaleNews (links to news.yale.edu)
  - Office of the Provost (links to provost.yale.edu)
  - Calendar (links to calendaryale.edu/cal/main/showEventList.rdo)
- Site Search

Features

- Header appears on all site pages universally
- Main Navigation sections display section pages on rollover
- Search opens a search bar on click
- Header is “sticky”. As user scrolls down the page, the header is hidden. It is shown again and pinned to the top of the viewport when a user scrolls up.

Used on:
All templates
Important Note
Main navigation sections are not links, as they do not represent pages; instead, they are labels for key user paths.

Generated by the CMS
- “Conduct Research” links (Core/Facility Directory views):
  - Cores/Facilities (filtered by “Core/Facility” Result Type)
  - Instruments/Equipment (filtered by “Instrument/Equipment” Result Type)
  - Cores/Facilities (filtered by “Services” Result Type)
  - All Offerings (unfiltered view)
- “Find Support” links (Resource Directory views):
  - Policies & Regulations (filtered by “Policies & Regulations” Resource Type)
  - Faculty Resources (filtered by “Faculty Resources” Resource Type)
  - Fundraising, Awards & Grants (filtered by “Fundraising, Awards & Grants” Resource Type)
  - Research Administration & Collaboration (filtered by “Research Administration & Collaboration” Resource Type)
  - Research Agreements & Contracts (filtered by “Research Agreements & Contracts” Resource Type)
  - All Resources (unfiltered view)
**Mobile Features**

- Navigation is concealed within hamburger menu
- On click of search icon, search bar appears below navigation
- On click of hamburger menu, menu opens, and main navigation sections and utility navigation links display
- On click of dropdown beside main navigation sections, section page links appear in a list
Sock & Footer
Interested in learning more about Cores at Yale?

Nemo enim ipsum voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos.

Learn About Cores

Fields Needed

- Statement ★ (i.e., “Interested in learning more...”)
  - Text Field - Plain
- Description ★
  - Text Field - Plain

Generated by the CMS

- CTA Button (links to the “Research Cores” page under the “Learn More” section)
Interested in learning more about Cores at Yale?

Nemo enim ipsum voluptatem quia voluptas sit aspernatur aut odio aut fugit, sed quia consequuntur magni dolores eos.

Learn About Cores

Fields Needed

- **Links [max 3]** ★
  - URL + Title Field
  - **Help Text**: Use this field to link to the Core/Facility Directory, the Resources Directory, and "About Research at Yale"

- **Phone Number** ★
  - Phone Number Field

- **Address** ★
  - Text Field - Simple HTML

- **Social Media Links [no max]**
  - Icon
    - Font Awesome Select
  - Title
  - Text Field - Plain
  - Link
    - URL Field

- **Legal Links [max 3]** ★
  - URL + Title Field

**Generated by the CMS**

- Research at Yale logo *(links to Homepage)*
- Utility Navigation *(Announcements, YaleNews, etc.)*
- Icons (external, contact)
- “Copyright © [current year] Yale University. All rights reserved.”
Navigation

- **Navigation Items**
  - Display the title (linked) of all child pages of the current page.

**Generated by the CMS**

- “More in [Current Page Title]”
On-page Sticky Navigation
Features

- Appears when 2 or more components are leveraged (see full list of components on following slides; also labeled in the list of Page Elements for the Core/Facility template and Offering template).
  - If no Optional Components are leveraged (or only one), this navigation will not display.

- Uses the On-page Navigation Name from each component (as defined on that component's slide) to create a navigational list reflecting page content.

- On-page Navigation Names serve as anchor links, linking the user down (or up) the page to its corresponding component.

- If an Optional Component is not leveraged on a given page, its On-page Navigation Name will not appear in this navigation.

Mobile Features

- Once the viewport width becomes too narrow to include all anchor links in a single line, UI changes to display an abbreviated navigation, displaying a single [Current Section] alongside a menu that may be expanded to display remaining navigable sections.
Core/Facility Detail, including some of the available components

Core/Facility Components used to create Sticky Nav + their name in the navigation bar:

- Body Section – “Overview”
- Contacts – “Contacts”
- Rates Section – “Rates”
- Instrument/Equipment List – “Instruments/Equipment”
- Services List – “Services”
- Checkerboard – Component Heading’s Title field content
- Featured Media Gallery – “Photos/Videos”
- Additional Resources – “Resources & Guidelines”
Offering Detail, including all available components

Offering Detail, including 2 available components

Offering Components used to create Sticky Nav + their name in the navigation bar:

- Body Section – “Overview”
- Specifications Section – “Specifications”
- Rates Section – “Rates”
- Expandable Section – Title field content, e.g., “s”
- Training & Services Section – “Training & Services”
- Checkerboard – Component Heading’s Title field content
- Featured Media Gallery – “Photos/Videos”
- Additional Resources – “Resources & Guidelines”
Sitewide Alerts
Overview
The sitewide alerts appear on all pages of the site, before everything else on the page, including the main navigation. This functionality is provided by a module; the field definitions are not alterable.

Fields in the Module
- Sitewide Alert [no max]
  - Name ★ (for administrative purposes only)
    - Text Field - Plain
  - Alert Style [max 1] ★
    - Options:
      - Long-Term Banner
      - Notice
      - Warning
  - Alert Message
    - Text Area - Full HTML
  - Dismissible
    - Checkbox - Dismissible
    - Checkbox - Ignore previous dismissals (appears only after the alert is initially saved)
  - Scheduling
    - Checkbox: Schedule Alert - Triggers start/end date fields if checked
      - Start Date - date & time fields
      - End Date - date & time fields
  - Page Visibility
    - Checkbox: Limit by Page - Triggers a “Pages” field and “Negate for listed pages” if checked
      - Pages - plain text area
      - Negate for listed pages - Off/On radio button
  - Active
    - Checkbox

Alerts of style “Warning” (not dismissible):

Alert of style “Long-Term Banner” (not dismissible):

Alerts of style “Long-Term Banner” + “Warning” (both are dismissible):
Alerts of style “Long-Term Banner” + “Notice” (only the Banner is dismissible):

- Anywhere the admin theme is visible (e.g., back end), the alerts will not display.
- Long-Term Banner item/s will display above Notice and Warning items, no matter what.
- All active items will appear, no matter how many there are. Client to manage the number of active items.

Hardcoded

- The “Alert Style” selection—Long-Term Banner, Notice, Warning—alters design specific visual cues (e.g. icon, color).
Functionality of Alert Options

● Dismissible (default = unchecked)
  ○ Dismissible
    ■ Unchecked - Alert will appear on expected pages if it’s active; no X to close it
    ■ Checked - Alert will appear on expected pages if it’s active, X appears to close it
  ○ Ignore previous dismissals - This option only appears once the Alert has been created; doesn’t matter if it’s active or not.
    ■ Checked - Next time page is loaded where alert should appear, alert will appear again even if it’s been dismissed previously. User can dismiss it again.
    ■ Note: The Ignore previous Dismissals flag will only be valid until the next time the Alert is dismissed.

● Scheduling (default = unchecked)
  ○ Unchecked - Alert will appear on expected pages if it’s active
  ○ Checked - Alert will appear on expected pages if it’s active AND it’s within the designated Start & End Date day/time window.

● Page Visibility (default = unchecked)
  ○ Unchecked - Alert will be displayed site wide
  ○ Checked - Alert will be visible on specified pages (Negate for listed pages = ‘off’
  ○ Negate for listed pages (Off = limit to those pages, On= all pages except listed)

● Active (default = checked)
  ○ Unchecked - Alert will not display
    ■ Note: Being unchecked allows multiple Alerts to exist without being displayed. Alerts can be done in advance for certain conditions (snow day information), or be relevant to current needs. A bunch of inactive alerts can be waiting in the wings to be tweaked (if needed) and made active on short notice.
  ○ Checked - Alert will appear if all other criteria is aligned to allow it to appear (for example, if Scheduling is checked and it’s in the schedule window)
Privacy Policy
Configurable Options

- Notice text
  - Text Field - Plain
- Dismiss button label
  - Text Field - Plain
- Review privacy policy link
  - Text + URL field
- Activate/Deactivate checkbox
  - Checkbox

Features

- When activated, this element is displayed as a sticky footer element on every page of the site until “Dismiss” is selected.
- “Dismiss” closes the module and removes it across site (sets a cookie).
  - Dismiss label may be edited, for example, to “Agree” or “OK, I understand”
- “Review Privacy Policy” link opens up a new browser window of a general page below the homepage with privacy policy content. It does not dismiss the panel. Panel continues to appear on every page of the site until “Dismiss” is selected.
- This is for GDPR compliance.
Breadcrumbs
Features

- Show immediate (1 level up) parent page of the current page (linked) and the current page (static).
- Do not show breadcrumbs on level 1 pages or pages that do not have parents (i.e., pages that live at the root).
- Do not include homepage
Features

- Allows users to browse easily from page to page. Informs the user about how many elements are in the list.
- Should identify what page is active and how many pages are in included in the listing.
- Includes numbers of pages along with next/previous links and first/last links.