**Instructions on creating a Relay site**

These instructions are for sending to external organizations that are setting up a new instance of Relay on their servers.

Requirements:

1. Minimum 20GB hard-disk space
2. Ubuntu 12.04 or 14.04
3. LAMP stack
4. Installation of Drupal 7.x
5. Download and installation of Relay Code Base from github
6. Download and installation of Relay database

This assumes that they are have downloaded the code base from github and have properly attached the Relay database to the code base and your Relay site is up and running.

1. Download the code base from github and properly attach the Relay database to the code base and make sure your Relay site is up and running. By default, an event called “test” has been installed.
2. Someone with FTP/SSH access will need to edit the sites/default/settings.php file. Remove the "#" at the beginning of line 281, and change the base\_url to the URL of this Relay instance.
3. Login to Drupal using the provided admin account credentials (un:admin pw:che3flob3).
4. Go to Configuration>System>Site Information and change the site information email address.
5. Go to Configuration>System>Mimemail and update the From Name and From Email address for alert notifications.
6. Go to Structure>Menus>MainMenu and update the Contact Us email address by editing the Contact Us menu item.
7. Go to Configuration>Regional & language>Regional settings set the default country and timezone for the site.
8. Go to People and cancel all user accounts which are not needed for the new site and update the email address for the main admin account (the one you are logged in as).
9. Go to Content and delete all existing cards, and all events **except for the "Unassigned Event,"** which is used to assign imported cards that do not match to an existing Relay event. Then click on the Media tab on the content list and delete all existing media files.
10. Login to Relay's Disqus account and create a Short Name, Public Key, and Secret Key for the new site. Then update the Disqus Drupal module (Configure>Web services>disqus) with the Short Name, Public Key, and Secret Key (under Advanced) you just created.
11. Create an email account/mailbox that will be used for sending in cards to Relay. Then go to Structure>Mailhandler>Mailboxes. For the "Relay Mailbox" click the arrow to the right of test connection and click edit to fill in the mailbox settings for the mailbox you are using for your Relay instance. This is similar to adding an email account to your email reader software like outlook or apple mail. Fill in the server, port, username, and password for your Relay mailbox. Once you've saved your mailbox settings, enable this mailbox.
12. If you will be using Flickr for posting images to Relay, get the User ID (long number at the end of your photostream URL) and api key (create an app in your account) for your Flickr account. Then go to Configuration>Workflow>Rules in Drupal admin and edit the "Flickr photo card on cron run" rule. Click on "Execute custom PHP code" under Actions. In the first two lines of the value field change the $uname and $apikey to correspond to the Flickr account you are using.
13. If you will be using YouTube for posting videos to Relay, get the username for your YouTube channel. Then go to Configuration>Workflow>Rules in Drupal admin and edit the "YouTube video card on cron run" rule. Click on "Execute custom PHP code" under Actions. In the first line of the value field change the $username to your YouTube username.
14. If you will be using Vimeo for posting videos to Relay, get the id number of the Vimeo channel you will be using (not the overall account, but the specific channel within the account). Then go to Configuration>Workflow>Rules in Drupal admin and edit the "Vimeo video card on cron run" rule, which is under Disabled rules. Click on "Execute custom PHP code" under Actions. In the first line of the value field change the "#" in define("CONSTANT", "#"); to the id number of the Vimeo channel you are using. Enable the rule when you are done updating it.
15. If you will be using Google Analytics to track site usage, then create new Web Property within your organization's Google Analytics account. Then go to Modules in Drupal and enable the Google Analytics module. Finally GO to Configuration>System>Google Analytics and enter your Web Property ID.
16. Update the About Relay page by going to the page and clicking on the edit tab.

**Optional setup and information regarding the Relay System**

## ****Configuring Comments****

Relay integrates with Disqus commenting service to allow visitors to comment on cards. Relay uses the Disqus module. Configuration is as follows:

1. Download and install the Disqus module into your respective sites directory (sites/all/modules).
2. Enable the module in admin/build/modules
3. Register your site at Disqus.com
4. Visit admin/settings/disqus and set your configuration options depending on what you registered with on Disqus, as well as what node types you'd like Disqus comments to be present on.
5. Enable the "view disqus comments" permission at admin/user/access or admin/user/permission for users you'd like to see the comments
6. Visit admin/build/block to show some Disqus information in the block regions
7. Disable Drupal commenting on the content types for which you have Disqus enabled. This will prevent Drupal comments from being open on new posts.
8. (optional) Disable permissions for site visitors to use Drupal comments. This is recommended if you are replacing all new comments on your site with the Disqus system. Otherwise, comments will remain open on your existing content
9. (optional) Install the Global Redirect module to enable URL Alias redirects with links from Disqus

## ****Event Content Tags****

Each event has an Event Content Tag. This tag is used to match imported cards with the correct Relay Event. You need to add  #specificeventcontenttag to the end of titles of Vimeo and YouTube videos, Flickr photos and email subject lines. If a match can not be found or the Event Content Tag is missing from the imported card, then the event will be assigned to the Unassigned Event.

## ****Configuring Social Sharing****

Relay integrates AddThis social sharing service to allow visitors to share share cards they like through their social networks. WeRelay uses the AddThis module for this integration. You can determine which social medial services you want to allow like face book, bing, LinkedIn etc through the AddThis service not through Drupal. Module provides share field after installation add that field to the content type of content which you would like to share.

## ****Configuring Menu Drop Menu****

Relay the standard Drupal menu system with the Menu Per Role module to restrict access to menu items based on the role assigned to the user. Relay uses tokens (event id) to allow the Manage Cards and Add Cards menu links to customize the target URL based on the event being viewed. Since there is a generic version of each of these two menu items we are using css to hide the version that is not relevant.

## ****Configuring AWS****

Configure Elastic Ips and send a request for the A-Record to be created. For a clean install of Ubuntu/Drupal on AWS please refer to this link: [Installing Ubuntu 12.04 and Drupal 7 on an Amazon AWS instance](https://bbginnovate.atlassian.net/wiki/display/AD/Installing+Ubuntu+12.04+and+Drupal+7+on+an+Amazon+AWS+instance)

## ****Live Stream Integration****

The current version of LiveStream does not have an API, so no direct import integration is possible. For now, reporters and editors must paste the LiveStream embed code into the Card node to create a LiveStream card on Relay. This will be revisited when an API is available.

## ****YouTube Integration****

Relay uses custom code embedded into Rules (Rule titles describe what they do) to import videos of that channel and create cards of them and also assigns cards to matching events based on #eventcontenttag. The custom code uses YouTube's API to determine if any videos have been posted to Relay's designated YouTube account and if so, it imports the video to Relay. If an imported videos's Event Content Tag doesn’t match with any events the card created for the video will be assigned to the ‘Unassigned Event’ as orphan video. If it does match then it will be assigned to the Relay Event matching the Event Content Tag. These rules are triggered by a cron job which is set to run every 10 minutes, but can be run manually at anytime by selecting the import cards menu item.

 Videos can be posted to YouTube by uploading to the website via a web browser, using the YouTube capture mobile application, or emailing it to the YouTube account. To expedite creation of a Relay card from a YouTube video, forward the confirmation email from YouTube to the same email addresses used to post other types of Relay content through email.

## ****Vimeo Integration****

## Vimeo integration works the same as YouTube, with the following exceptions.

1. When posting a video to Vimeo it must be assigned to the specific designated Relay channel in order for the video to be imported.
2. The only method for posting a video on Vimeo is using a desktop web browser.

## ****Flickr Integration****

Flickr integration works the same as YouTube, except using Flickr's api.

## ****Polls****

Polls can only be created through the web administration interface on a desktop or mobile device.