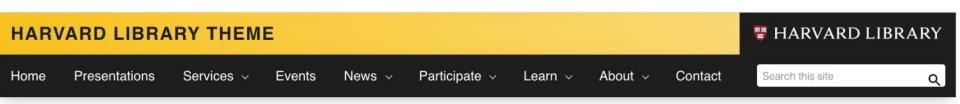
Harvard Library Custom Theme - Implementation Guide

This document discusses how to activate the Harvard Library custom theme and how to enable the specific styling of components (banners, buttons, blockquotes, etc.) found in an OpenScholar website. Utilizing this custom theme assumes a moderate level of OpenScholar proficiency, and basic knowledge of HTML.



HARVARD LIBRARY THEME DEMO SITE

Sandbox for child theme components, based on library.harvard and brand guidelines

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- Header and main menu content
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- Standard Text/HTML widget general element styling

- Buttons, ordered lists, text links with an arrow and eyebrow heading labels
- Background image hero with text dark
- Background image hero with text light

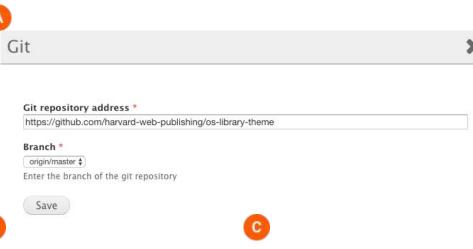
Table of Contents (cont)

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- Project page

- List of post widgets (card style)
 - o <u>People</u>
 - Events
 - News
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- <u>Visually hidden elements for</u> <u>accessibility reasons</u>

Activating the theme

- Logged in as a site administrator, navigate to the Themes screen (from the Admin menu - Appearance > Themes)
- 2) Click the <u>+Add subtheme</u> link at the top of the Themes screen
- 3) In the Themes popup, click the Git link.
- 4) Enter https://github.com/harvard-web-publishing/os-library-theme in the text field > select origin/master from the dropdown > Click Save (see A to the right)
- 5) The Harvard Library custom theme should now be visible under a Custom theme heading on the Themes screen (see B to the right)
- 6) Click on the Harvard Library custom theme > scroll down to the bottom of the screen > click Save (see C to the right)
- Your OpenScholar website should now reflect the general custom theme styling (font styles, background colors, etc.).



Custom themes



Custom themes



Updating the theme

Periodically, the theme will be updated by the Harvard Library design team. When an update is made, site owners currently using the theme will be notified by email. The site owner (or administrator) should then follow the steps below in order to apply the theme updates.

- 1) Click the "Update" link at the bottom of the Harvard Library custom theme thumbnail (see A to the right).
- 2) In the Update subtheme popup, select "master" from the Branch dropdown and then click the Update button (see B to the right).

After the OpenScholar system cache clears (roughly 20-30 minutes), the update theme styles should be seen.







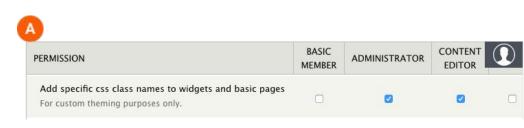
Enabling the custom class feature

Displaying custom styled widgets within this theme requires adding specific custom CSS class names to widgets and in some cases to a basic page. The instructions below detail how to enable the custom CSS class feature.

- Logged in as a site administrator, navigate to the Members and Roles screen > click the Permissions tab in the upper right corner of the screen
- 2) Scroll down to the "Add specific css class names to widgets and basic pages" row > check the checkbox under the Administrator column (see A to the right)
- 3) Click Save at the bottom of the screen

The custom CSS class feature should now be enabled. To confirm that the feature is enabled, navigate to the layout screen (from the Admin menu - Appearance > Layout).

- 1) Click Add new widget > Custom Text / HTML
- 2) At the bottom of the widget form, you should now see the "Apply css class name to this widget container" text field (see B to the right)

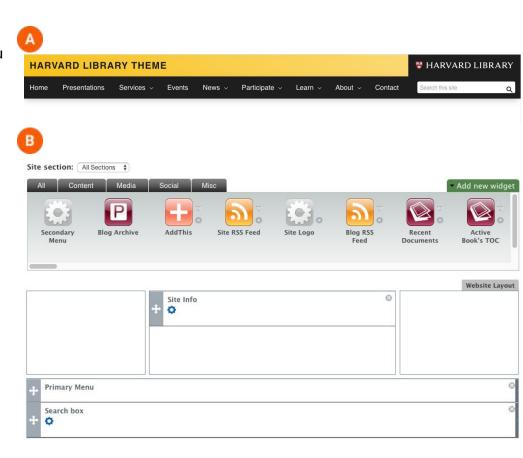




Header and main menu content

This custom theme requires that a specific header and menu layout be used (see A to the right).

- Navigate to the layout screen (from the Admin menu -Appearance > Layout)
- 2. Select "All sections" from the Site section dropdown
 - a. Place the Site info in the middle header region
 - Only the Title field should be populated
 the rest of the fields should be left
 empty
 - Place the Primary Menu above the Search box widget in the menu bar region > click Save (see B to the right)

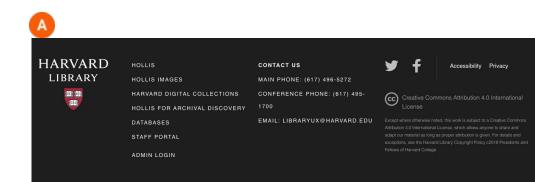


Footer content

This custom theme automatically adds the logo, the menu next to the logo and the social/accessibility links that are displayed on the right side of footer (see A to the right).

To display site specific content, a secondary menu or a Custom Text / HTML widget can be placed in the middle footer region. A Custom Text / HTML widget can be used to display text, headings, links and lists.

See next slide for details.

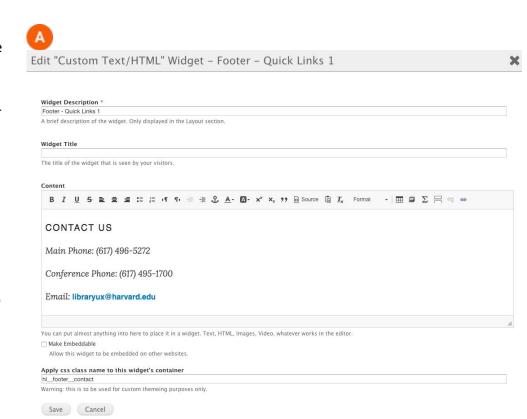


Footer content, continued

To display a site specific Custom Text / HTML widget in the footer:

- Navigate to the layout screen (from the Admin menu -Appearance > Layout)
- 2. Select "All sections" from the Site section dropdown
- 3. Create a Custom Text / HTML widget and enter the class "hl_footer_contact" in the css class name field
- 4. Enter text in the editor:
 - a. Headings should be h4 (Format dropdown)
 - b. Each line of text should be a separate paragraph (Format dropdown) or list item
 - c. Text links are automatically styled
 - d. Drag the new Custom Text / HTML widget into the middle footer region
- 5. Click Save at the bottom of the layout screen

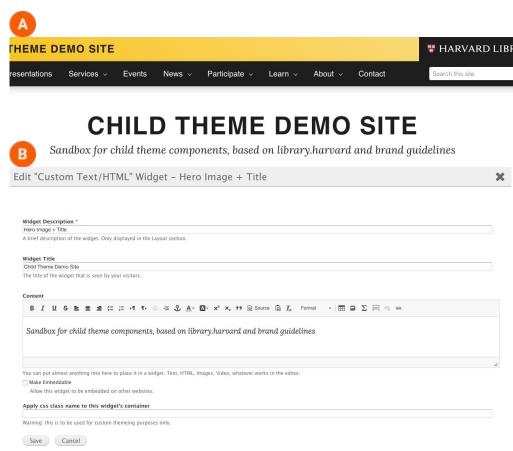
(see A to the right)



Full width large title with text (centered)

To display a full width widget with a large title and paragraph text (see A to the right):

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- 2. Create a Custom Text / HTML widget. No custom css class is needed. (see B to the right)
 - a. Enter a Widget Title
 - b. Each line of text should be a separate paragraph (Format dropdown)
 - c. Drag the new Custom Text / HTML widget into the content top region. The large heading style depends on the widget being in the correct region.
- 3. Click Save at the bottom of the layout screen



Standard Text/HTML widget - general element styling

A Standard Text/HTML widget can be used to display a variety of content.

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- 2. Create a Custom Text / HTML widget. (see A to the right)
 - a. Enter any combination of text, lists or images to the body of the widget
 - b. Each line of regular text should be a separate paragraph (Format dropdown)
 - c. Each heading should be a separate h2 (Format dropdown)
 - d. Drag the new Custom Text / HTML widget into the desired region.
 - e. By default, the widget's max width is 930px, to create full width version add the class "hl_full-width" in the css class name field
- 3. Click Save at the bottom of the layout screen



The User Research Center (URC) at Harvard Library is Harvard's premier lab for user-centered design, digital accessibility, and testing. The URC is open Monday through Friday, 9:00AM to 5:00PM and is located in Lamont Library A-10, just one floor down from the Lamont Cafe. View detailed directions for finding the space.

FACILITIES & TECHNOLOGY

We provide the space and tools for you to test the user experience of your digital products. The lab supports methods like interviews, prototype reviews, usability testing, and accessibility testing. The lab is available for booking or we offer equipment you can borrow to run tests anywhere.

AT THE URC YOU CAN:

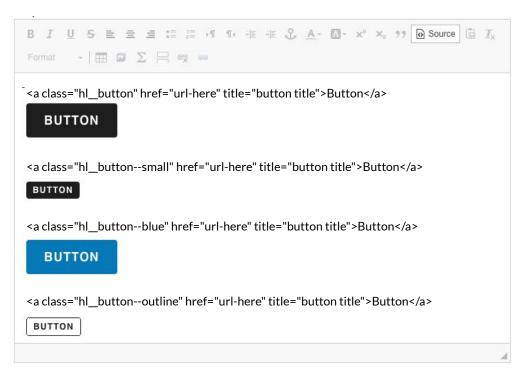
- Get advice from experts on best practices in UX.
- · Attend learning opportunities like workshops and webinars.
- Consult with experts on usability and digital accessibility projects.
- Recruit from participant pools of Harvard students and assistive technology users.

Buttons, ordered lists, text links with an arrow and eyebrow heading labels

Specially styled buttons, ordered lists and text links with arrows can be created anywhere the text editor is available.

1. To create buttons, in the text editor switch to the source view and use the HTML shown on the right

See the next slide for ordered lists and text links with arrows

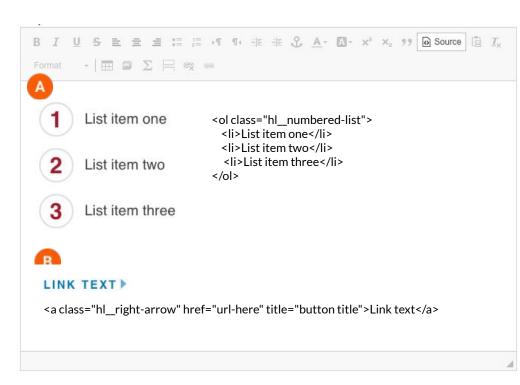


Buttons, ordered lists, text links with an arrow and eyebrow heading labels (cont)

Specially styled buttons, ordered lists and text links with arrows can be created anywhere the text editor is available.

- 1. To create styled ordered lists, in the text editor switch to the source view and use the HTML shown to the right of the styled list (see A to the right)
- 2. To create a styled text link with an arrow, in the text editor switch to the source view and use the HTML shown on the right (see B to the right)

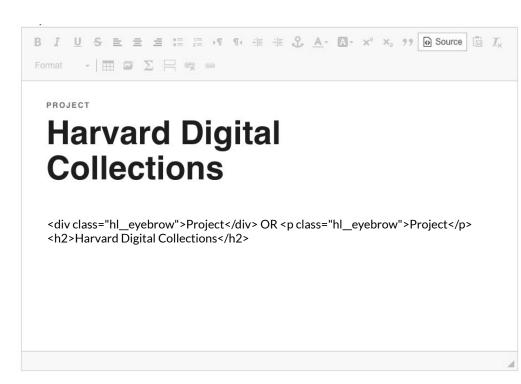
See the next slide for eyebrow heading labels



Buttons, ordered lists, text links with an arrow and eyebrow heading labels (cont)

Specially styled buttons, ordered lists and text links with arrows can be created anywhere the text editor is available.

1. To create eyebrow heading labels (the small label above the heading), in the text editor switch to the source view and use the HTML shown to the right



Background image hero with text - dark

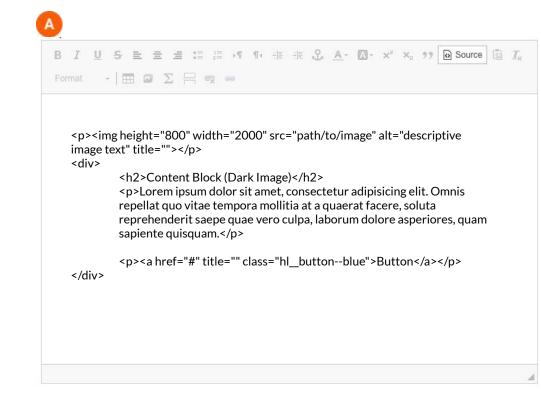
Large background image heroes with text can be displayed in any content region of a page. Images should be at least 2000px wide by 800px high. (see A to the right).

See the next slide for widget creation



Background image hero with text - dark (cont)

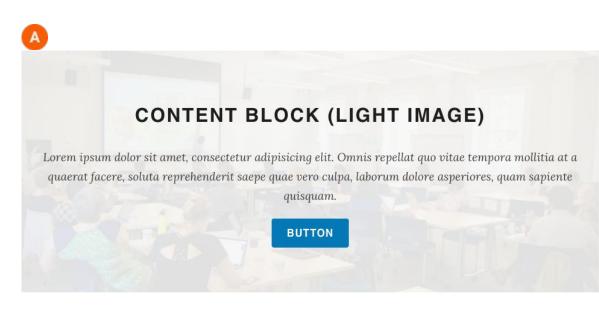
- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- Create a Custom Text / HTML widget. (see A to the right)
 - a. In the text editor switch to the source view and use the HTML similar to what's displayed to the right. Note the outer div around the heading and text
 - b. Add the class"hl_content-block--dark-image" in the cssclass name field
 - c. Drag the new Custom Text / HTML widget into the desired region
- 3. Click Save at the bottom of the layout screen



Background image hero with text - light

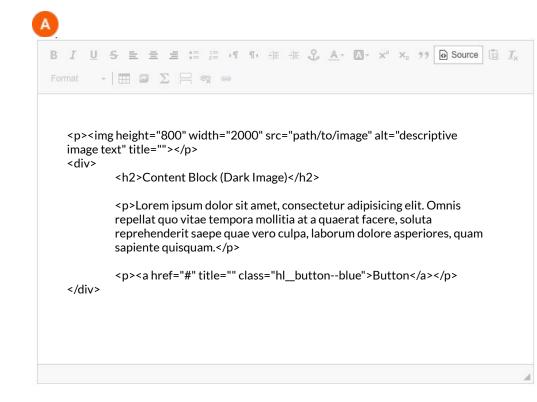
Large background image heroes with text can be displayed in any content region of a page. Images should be at least 2000px wide by 800px high. (see A to the right).

See the next slide for widget creation



Background image hero with text - light (cont)

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- Create a Custom Text / HTML widget. (see A to the right)
 - a. In the text editor switch to the source view and use the HTML similar to what's displayed to the right. Note the outer div around the heading and text
 - b. Add the class"hl_content-block--light-image" in the cssclass name field
 - c. Drag the new Custom Text / HTML widget into the desired region
- 3. Click Save at the bottom of the layout screen



Dotted background hero with text

Large dotted background heroes with text can be displayed in any content region of a page. (see A to the right).

See the next slide for widget creation



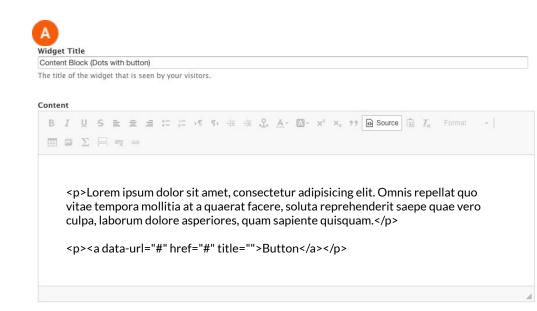
CONTENT BLOCK (DOTS WITH BUTTON)

Lorem ipsum dolor sit amet, consectetur adipisicing elit. Omnis repellat quo vitae tempora mollitia at a quaerat facere, soluta reprehenderit saepe quae vero culpa, laborum dolore asperiores, quam sapiente quisquam.



Dotted background hero with text (cont)

- 1. Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- 2. Create a Custom Text / HTML widget. (see A to the right)
 - a. In the text editor switch to the source view and use the HTML similar to what's displayed to the right. Note the heading is the Widget Title
 - b. Add the class
 "hl_content-block--dots-button" in the css
 class name field when a button is utilized
 and "hl_content-block--dots" when there is
 no button
 - c. Drag the new Custom Text / HTML widget into the desired region
- 3. Click Save at the bottom of the layout screen



Pull quote without an image

A pull quote can be displayed in any content region of a page. (see A to the right).

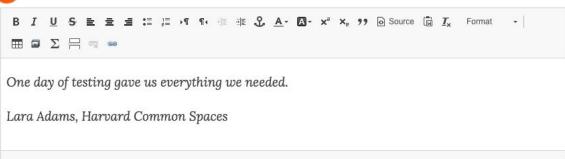
- Create a Custom Text / HTML widget. (see B to the right)
 - a. Each line of text should be a separate paragraph (Format dropdown). The first line/paragraph is the quote and the second line/paragraph is the attribution
 - b. Add the class "hl_pull-quote" in the css class name field when the quote is centered on the page, and "hl_pull-quote hl_pull-quote--left" when the quote is left aligned on the page
 - c. Drag the new Custom Text / HTML widget into the desired region
- 2. Click Save at the bottom of the layout screen



One day of testing gave us everything we needed.

- Lara Adams, Harvard Common Spaces





Pull quote with an image

A pull quote with an image can be displayed in any content region of a page. (see A to the right).

See the next slide for widget creation



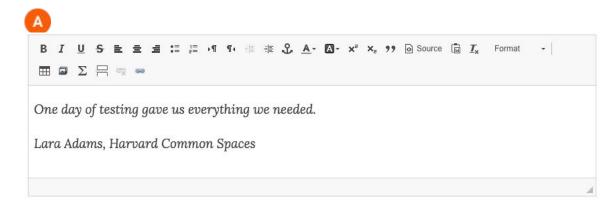
Important quote about this project and its impact goes here. The photo is always optional.

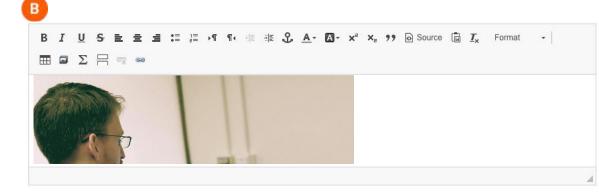
ere. The photo is

Person's Name, Technology Specialist

Pull quote with an image (cont)

- Create a Custom Text / HTML widget. (see A to the right)
 - Each line of text should be a separate paragraph (Format dropdown). The first line/paragraph is the quote and the second line/paragraph is the attribution
 - b. Add the class "hl_pull-quote" in the css class name field
- Create a Custom Text / HTML widget. (see B to the right)
 - Add a square shaped image that is at least 800px wide by 800px high
 - b. No class name is needed



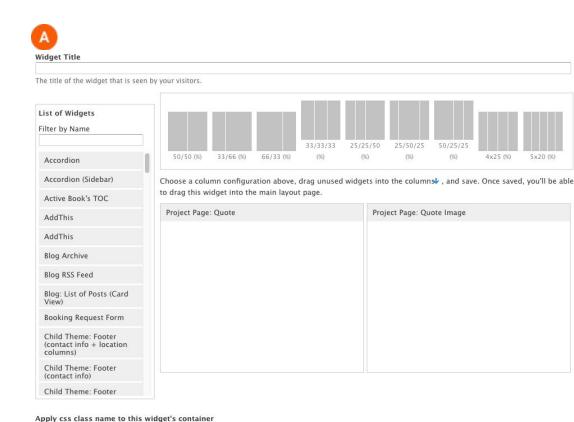


Pull quote with an image (cont)

hl_pull-quote

Warning: this is to be used for custom themeing purposes only.

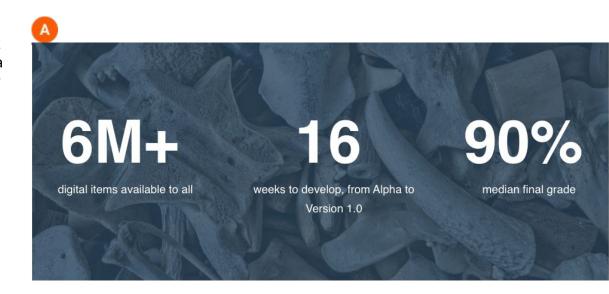
- 1. Create a Columns widget with a 50/50 layout. (see A to the right)
 - Drag the Custom Text / HTML widget created on previous slide into the left column
 - Drag the image widget created on previous slide into the right column
 - Add the class "hl_pull-quote" in the css class name field
 - d. Drag the new Columns widget into the desired region
- Click Save at the bottom of the layout screen



Background image with 2-4 quick facts

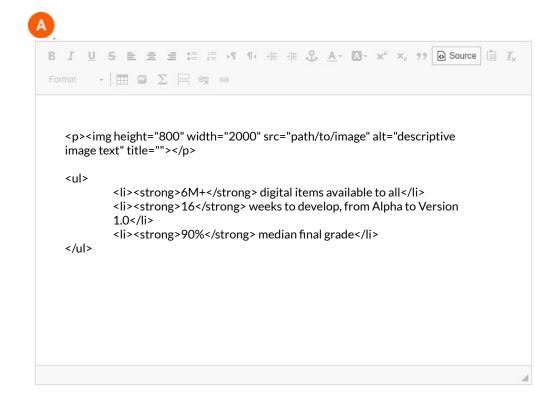
Large background image heroes with 2 -4 quick facts can be displayed in any content region of a page. Images should be at least 2000px wide by 800px high. (see A to the right).

See the next slide for widget creation



Background image with 2-4 quick facts (cont)

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area > This Page > Layout)
- 2. Create a Custom Text / HTML widget. (see A to the right)
 - a. In the text editor switch to the source view and use the HTML similar to what's displayed to the right. Note the strong style around the data point.
 - Add the class "hl_quick-facts" in the css class name field
 - c. Drag the new Custom Text / HTML widget into the desired region
- 3. Click Save at the bottom of the layout screen

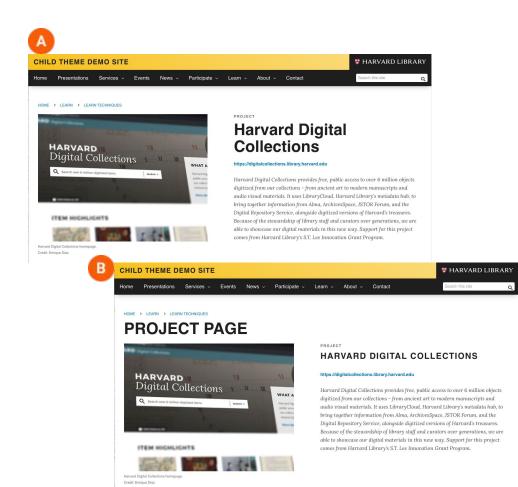


Project page

A "project page" layout can be set up to highlight content specific to a certain topic (see A to the right). When a specific class is applied to the page, and specific classes are applied to two separate HTML widgets -- one with an image (left side) and one with text (right side): the page title is hidden, and the h2 in the text widget on the right, is styled with larger type.

Without the page and widget classes applied, the content will display as a regular page (see B to the right).

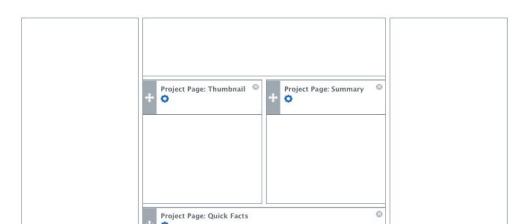
See the next slide for project page creation



Project page (cont)

- To apply a class to a project page in order to achieve the effects highlighted on the previous slide, (click the large grey gear in the content area> This Page > Edit)
- 2. Add the class "hl_story" to the text field found in Apply CSS section in the lower right corner of the page form (see A to the right)
- 3. Click Save at the bottom of the page form
- 4. Create a Custom Text / HTML widget with an image and add the class "hl_story_thumbnail" in the css class name field
- 5. Create a Custom Text / HTML widget with an H2 and some text and add the class "hl_story_summary" in the css class name field
- 6. Drag the Custom Text / HTML widget with an image, titled "Project Page: Thumbnail in" into the content left region. Then drag the Custom Text / HTML widget with an H2 and some text, titled "Project Page: Summary" into the content right region.
- 7. Click Save at the bottom of the layout screen





List of Post widgets (card style)

List of Post widgets can be created and set to display in a card style layout with three columns. Examples of People and Events can be seen to the right. This card style layout is best displayed when the list of post widget is placed in a page without sidebars.

See the next set of slides for specific instructions about how to apply the correct card style settings



SEE CALENDAR >

PEOPLE: LIST OF POSTS (CARD VIEW)







List of Post widgets (card style) - People

People

When a People List of Post widget is set to display as cards, the result should look like what is seen to the right.

See the next slide for specific instructions about how to apply the correct card style settings

PEOPLE: LIST OF POSTS (CARD VIEW)







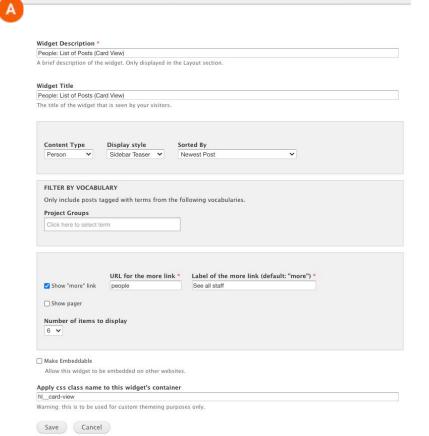
SEE ALL STAFF

List of Post widgets (card style) - People,

continued

People

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area> This Page > Layout)
- Create a List of Post widget. (see A to the right)
 - a. Set the content type to Person
 - Set the display style to Sidebar Teaser
 - c. Set the number of items to display a number that is a multiple of 3
 - d. Add the class "hl_card-view" in the css class name field
 - e. Drag the new List of Post widget into the desired region
- Click Save at the bottom of the layout screen



Edit "List of Posts" Widget - People: List of Posts (Card View)

List of Post widgets (card style) - Events

Events

When an Events List of Post widget is set to display as cards, the result should look like what is seen to the right.

See the next slide for specific instructions about how to apply the correct card style settings

UPCOMING EVENTS (CARD VIEW)













```
UX Drop-In Office Hours
17 10:00am to 12:00pm
```

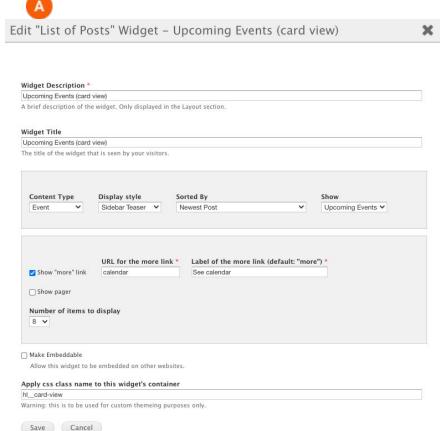


SEE CALENDAR >

List of Post widgets (card style) - Events, continued

Events

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area> This Page > Layout)
- Create a List of Post widget. (see A to the right)
 - a. Set the content type to Event
 - b. Set the display style to Sidebar Teaser
 - c. Set the number of items to display a number that is a multiple of 3
 - d. Add the class "hl_card-view" in the css class name field
 - e. Drag the new List of post widget into the desired region
- Click Save at the bottom of the layout screen



List of Post widgets (card style) - News

News

When a News List of Post widget is set to display as cards, the result should look like what is seen to the right.

See the next slide for specific instructions about how to apply the correct card style settings

NEWS: LIST OF POSTS (CARD VIEW)



The Focus is Harvard and Slavery

January 13, 2020

Pusey Library exhibit details the University's connections to a deep past still being uncovered



Open Access to Harvard Research

January 13, 2020

Digital Access to Scholarship at Harvard (DASH) is a free repository of vetted research, breaking down barriers to information across the world....



At the Harvard Ed Portal's Mural Club, ingenuity first

January 13, 2020

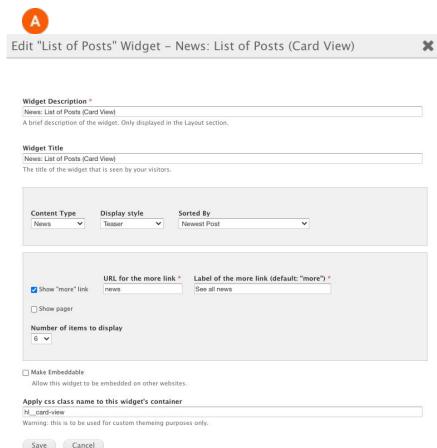
In past sessions of the Mural Club, Allston-Brighton students in grades six through eight spent eight weeks working with two instructors...

SEE ALL NEWS

List of Post widgets (card style) - News, continued

News

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area> This Page > Layout)
- Create a List of post widget. (see A to the right)
 - a. Set the content type to News
 - b. Set the display style to Teaser
 - c. Set the number of items to display a number that is a multiple of 3
 - d. Add the class "hl_card-view" in the css class name field
 - e. Drag the new List of post widget into the desired region
- Click Save at the bottom of the layout screen



List of Post widgets (card style) - Blog

Blog

When a blog list of post widget is set to display as cards, the result should look like what is seen to the right.

See the next slide for specific instructions about how to apply the correct card style settings

BLOG: LIST OF POSTS (CARD VIEW)

Celebrating HKS's New Diversity, Inclusion & Belonging Collection

January 13, 2020

The Harvard Kennedy School Library and the HKS Office of Diversity, Inclusion, & Belonging held an event to mark the creation of a new collection.

Professional Development and Performance Management

January 13, 2020

Dear Colleagues,

It was great to see so many of you at Harvard Library Learns!, our inaugural summit devoted to enriching the culture of learning and professional development across the libraries. I hope that you will take the time to reflect on the experience, find ways to utilize what you heard and saw and reconnect with those you met. To get the most out of a learning experience, be sure to speak with your manager about...

Library UX Brief - Issue 3

January 23, 2017

YOUR LIBRARY UX BRIEF

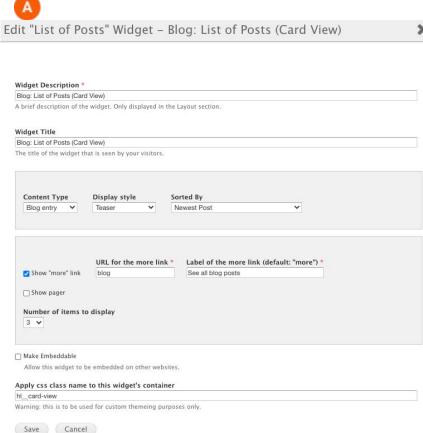
LEARNING HOW USERS NAVIGATE THE WIDENER LIBRARY STACKS

Ever wondered how people find the items they're looking for in the Widener Library stacks? Access Services & the Discovery to Delivery Working Group are collaborating on an in-person survey installed near the stacks exit to understand what information users take with them when locating an item on the shelf. Similar surveys may also take place in other libraries. The data collected will inform future updates to how location information is presented in HOLLIS+.

List of Post widgets (card style) - Blog, continued

Blog

- Navigate to the layout screen on the page where the widget will be placed (Click the large grey gear in the content area> This Page > Layout)
- Create a List of post widget. (see A to the right)
 - a. Set the content type to Blog
 - b. Set the display style to Teaser
 - c. Set the number of items to display a number that is a multiple of 3
 - d. Add the class "hl_card-view" in the css class name field
 - e. Drag the new List of post widget into the desired region
- Click Save at the bottom of the layout screen

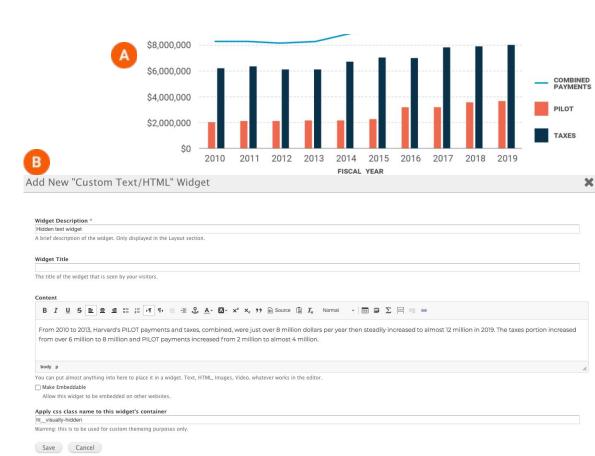


Visually hidden elements - for accessibility

Widgets can can be set up, and then intentionally visually hidden from a site visitor - only to be accessed by an assistive technology (screen reader) users.

In this example (see A to the right), an image based infographic is present in a page. The infographic is inaccessible because the data is part of the image and cannot be interpreted by an assistive technology. An accessible version of the information could be created in the form of a Custom Text / HTMLwidget (see B to the right), and then visually hidden in the page.

See the next slide for widget creation and layout information.



Visually hidden elements - for accessibility, continued

Continuing with the example from the previous slide.

- Create a Custom Text / HTML widget. (see A to the right)
 - a. Enter text in the editor field
 - b. Add the class "hl_visually-hidden" in the css class name field
 - Drag the Custom Text / HTML widget into the layout right below the infographic image widget (see B to the right)
- Click Save at the bottom of the layout screen

