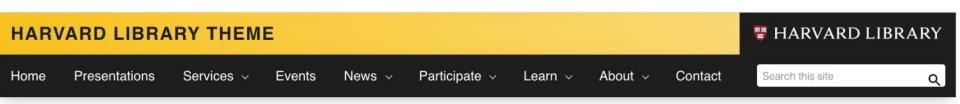
Harvard Library Custom Theme - Implementation Guide

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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- Content block (background image)
 dark or light

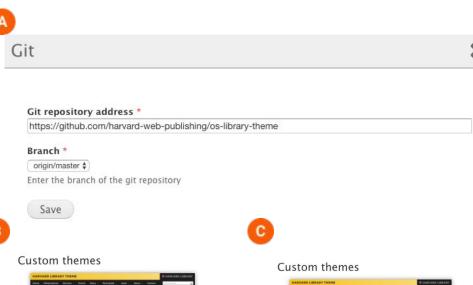
Table of Contents (cont)

- Content block (dotted background)
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- Project page

- List of post widgets (card style)
 - o <u>People</u>
 - Events
 - News
 - o Blog
- <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 > click Fetch results > 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)
- 7) Your OpenScholar website should now reflect the general custom theme styling (font styles, background colors, etc.).







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.

- Click the "Update" link at the bottom of the Harvard Library custom theme thumbnail (see A to the right).
- 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.







Update Harvard Library

Git repository address https://github.com/harvard-web-publishing/os-library-theme and update.

Update

This action will pull the latest version of the theme code from GitHub into OpenScholar.

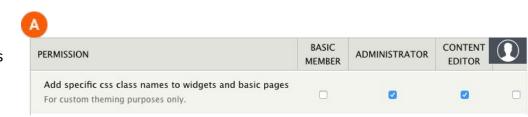
Enabling the custom class feature

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
- 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:

- Click Add new widget > Custom Text / HTML
- 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)



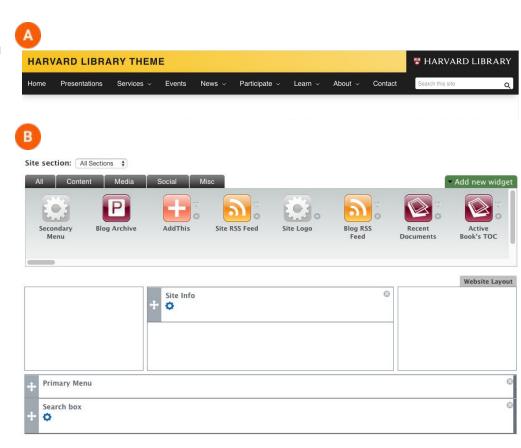


Header and main menu content

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

- On the layout screen 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. The contact form checkbox
 should be unchecked.
 - b. Remove all other widgets (if any) from the rest of the header widgets
 - Place the Primary Menu above the Search box widget in the menu bar region > click Save (see B to the right)
 - The menu should only have top level menu links, and optionally, one level of child links under the top level. This theme is not designed to accomodate third level menu links



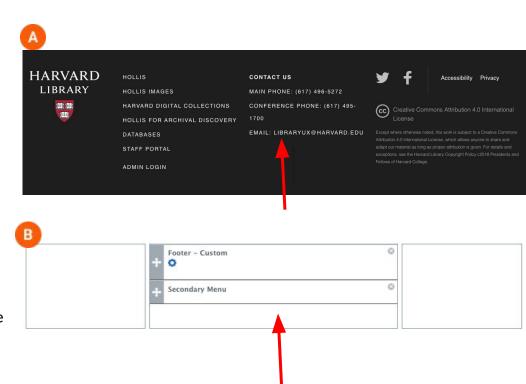
Footer content

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 (red arrow and B to the right). This area can be populated with custom text/HTML, menu, or both.

To display a secondary menu in the footer:

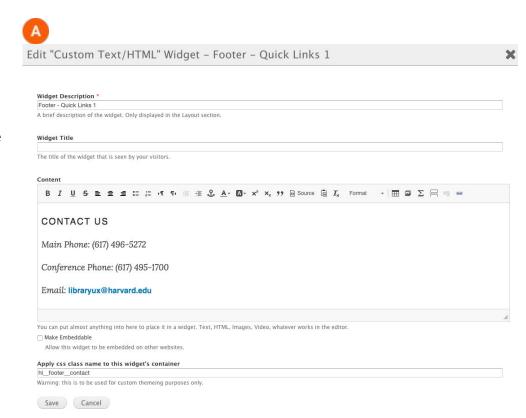
- 1. On the layout screen select "All sections" from the Site section dropdown
- 2. Create a secondary menu and drag it into the middle footer region (see B to the right)
- 3. Click Save at the bottom of the layout screen



Footer content, continued

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

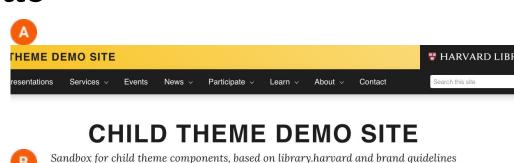
- On the layout screen select "All sections" from the Site section dropdown
- Create a Custom Text / HTML widget (see A to the right)
- Enter text in the editor:
 - a. Headings should be h4 (Format dropdown)
 - b. Each line of text should be a separate paragraph (Format dropdown) or list item
 - c. Text links are automatically styled
 - d. Drag the new Custom Text / HTML widget into the middle footer region (as depicted on the previous screen)
- 4. Click Save at the bottom of the layout screen

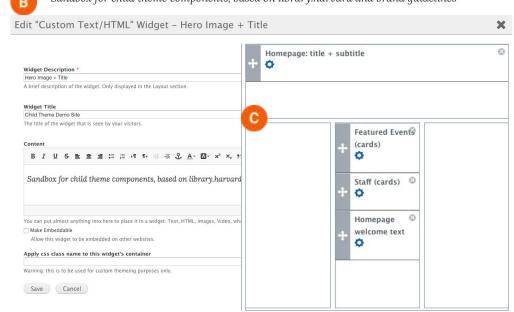


Homepage title and subtitle

To display a homepage title and subtitle. This is specific to the front page -- all other pages will get their page titles from the Page Content element. (see A to the right):

- 1. Navigate to the layout screen of your homepage.
- 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. With the exception of the title/subtitle widget, all other front page content should be placed in the middle region. (see C to the right)
- 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.

- 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. Headings can be: h2, h3, h4, h5, h6 (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
- 2. 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:

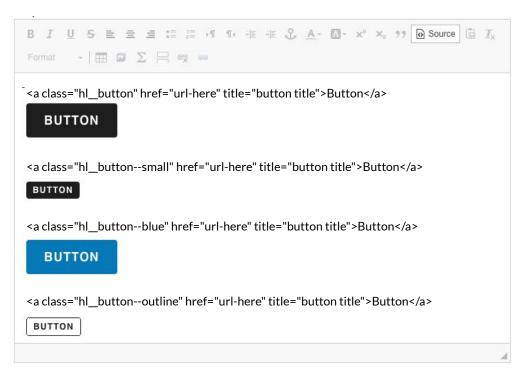
- · Get advice from experts on best practices in UX.
- · Attend learning opportunities like workshops and webinars.
- Consult with experts on usability and digital accessibility projects.
- Recruit from participant pools of Harvard students and assistive technology users.

Inline styles (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

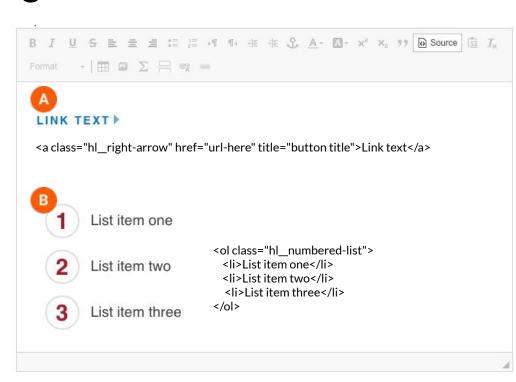


Inline styles (buttons, ordered lists, text links with an arrow and eyebrow heading labels) (cont)

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

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

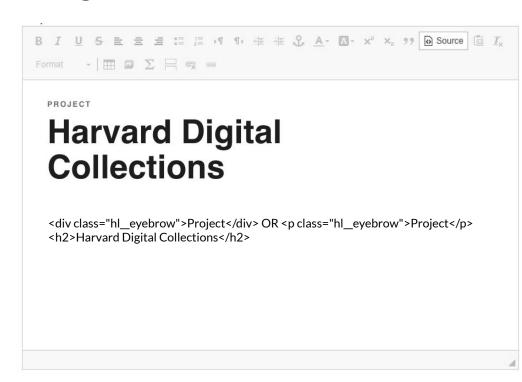
See the next slide for eyebrow heading labels



Inline styles (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.

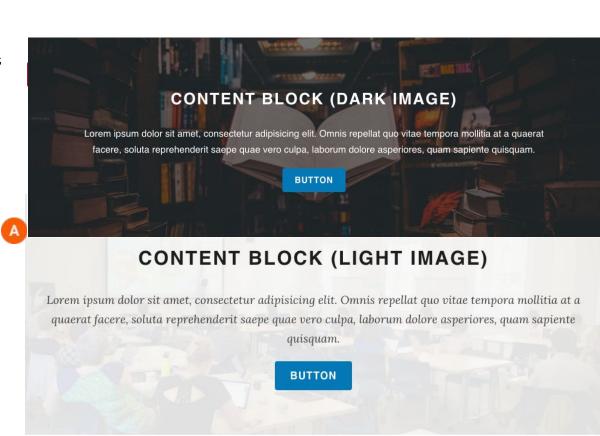
1. To create a eyebrow heading label (the small label above the heading), in the text editor switch to the source view and use the HTML shown to the right



Content block (background image) - dark or light

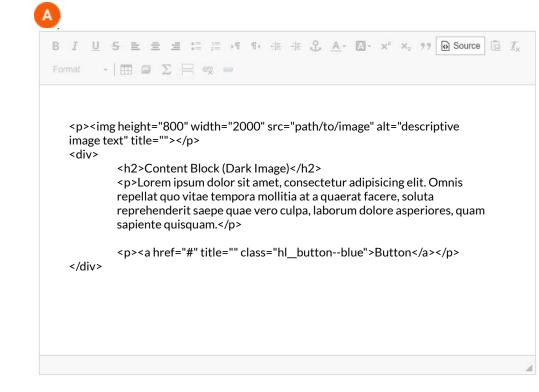
Large background image heroes with text can be displayed in any content region of a page. Images should be at least 2000px wide by 800px high. (see A to the right).

See the next slide for widget creation



Content block (background image) - dark or light (cont)

- 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, updating with your own background image, heading, description, and button text/link
 - Add the class
 "hl_content-block--dark-image" (for a dark wash and white text) or
 "hl_content-block--light-image" (for a light wash and black text) in the css class name field
 - c. Drag the new Custom Text / HTML widget into the desired region
- 2. Click Save at the bottom of the layout screen



Content block (dotted background)

Large dotted background heroes with text can be displayed in any content region of a page, with a button (see A to the right), or without a button (see B 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.





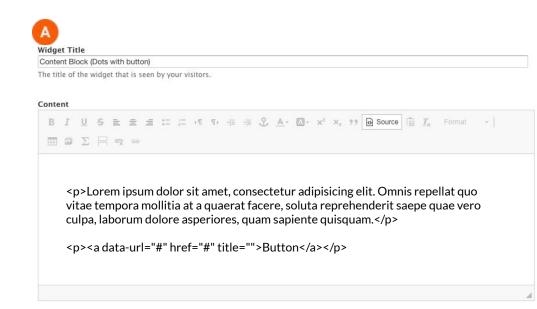
CONTENT BLOCK (DOTS WITH BUTTON)

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.

Content block (dotted background) (cont)

- Create a Custom Text / HTML widget. (see A to the right)
 - 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

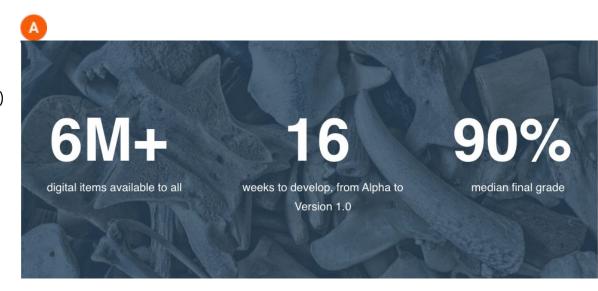
 "hl_content-block--dots-button" in the css
 class name field when a button is utilized
 and "hl_content-block--dots" when there is
 no button. Regular text links can also be
 used without applying a special class.
 - c. Drag the new Custom Text / HTML widget into the desired region
- 2. Click Save at the bottom of the layout screen



Content block (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. The image will always (automatically) have a blue tint applied to it. (see A to the right).

See the next slide for widget creation



Content block (quick facts) (cont)

- 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
- 2. Click Save at the bottom of the layout screen



```
Format - I D \Sigma \Si
                   <img height="800" width="2000" src="path/to/image" alt="descriptive"
                  image text" title="">
                   <strong>6M+</strong> digital items available to all
                                                                      <strong>16</strong> weeks to develop, from Alpha to Version
                                                                      1.0
                                                                      <strong>90%</strong> median final grade
```

Pull quote without an image

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

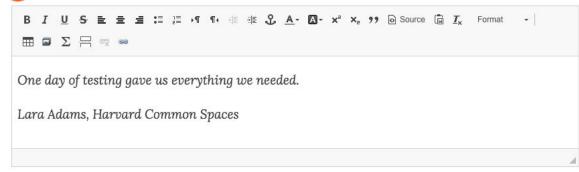
- Create a Custom Text / HTML widget. (see B to the right)
 - a. Each line of text should be a separate paragraph (Format dropdown). The first line/paragraph is the quote and the second line/paragraph is the attribution
 - b. Add the class "hl_pull-quote" in the css class name field when the quote is 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



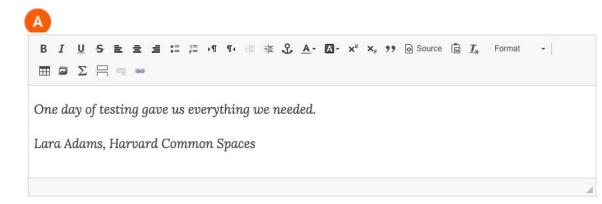
Important quote about this project and its impact goes here. The photo is always optional.

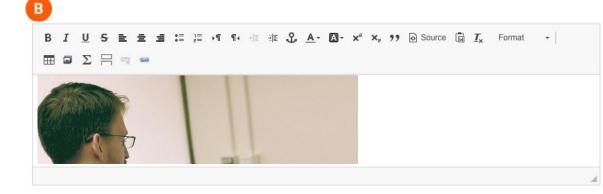
ere. The photo is

Person's Name, Technology Specialist

Pull quote with an image (cont)

- Create a Custom Text / HTML widget. (see A to the right)
 - 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
- Create a Custom Text / HTML widget. (see B to the right)
 - a. Add a square shaped image that is at least 800px wide by 800px high
 - b. No class name is needed



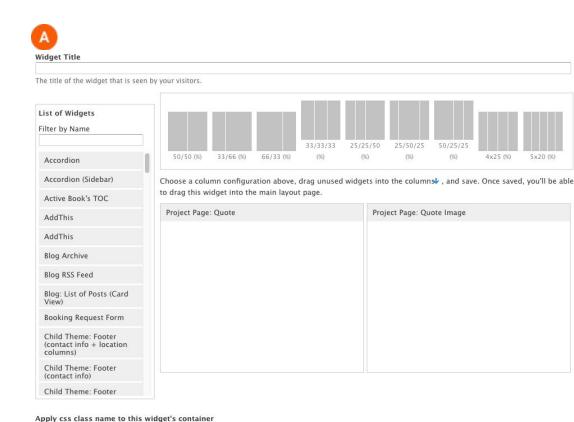


Pull quote with an image (cont)

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

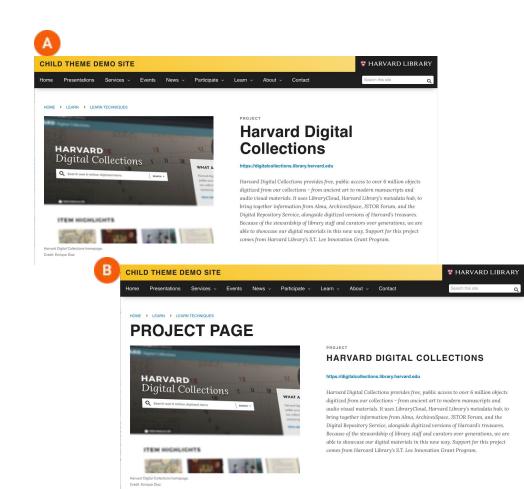


Project page

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).

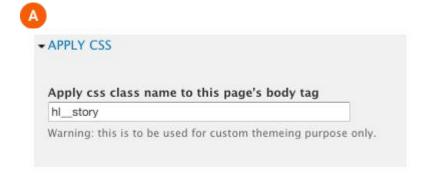
See the next slide for project page creation



Project page (cont)

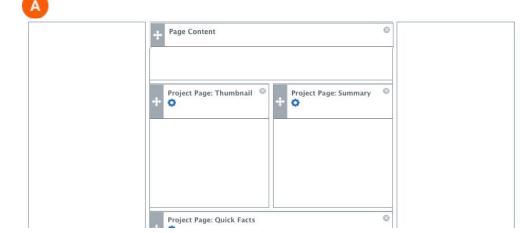
- To apply a class to a project page in order to achieve the effects highlighted on the previous slide, (click the large grey gear in the content area> This Page > Edit)
- 2. Add the class "hl_story" to the text field found in Apply CSS section in the lower right corner of the page form (see A to the right)
- 3. Click Save at the bottom of the page form
- Create a Custom Text / HTML widget with an image and add the class "hl_story_thumbnail" in the css class name field
 - Caption below the image can be added by applying tags. The text will be styled with small gray text.
- 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

See the next slide for the remaining instructions



Project page (cont)

- 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. Note: the Page Content widget seen in the top content region should be removed. Otherwise a noticeable gap will be seen at the top of the page. (See A to the right)
- 2. 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)





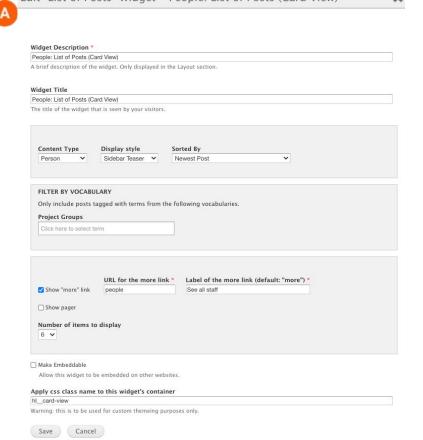


SEE ALL STAFF

List of Post widgets (card style) - People, continued Edit "List of Posts" Widget - People: List of Posts (Card View)

People

- 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



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)







User Research Center Tour

11:00am to 12:00pm



SEE CALENDAR >

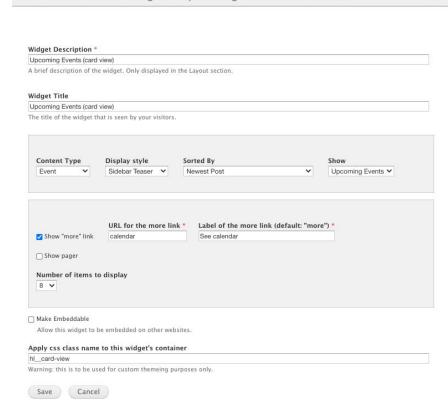
UX Drop-In Office Hours

10:00am to 12:00pm

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

Events

- Create a List of Post widget. (see A to the right)
 - a. Set the content type to Event
 - 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 - Upcoming Events (card view)

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. To set the length of teaser text displayed in a card, insert a line break (see red arrow) where desired. (See A 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)



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....

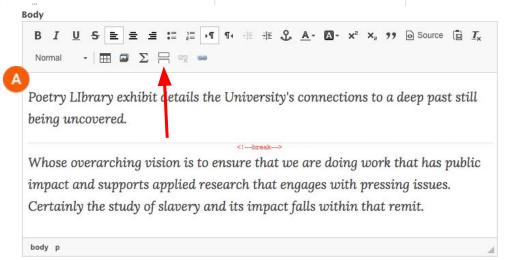


At the Harvard Ed Portal's Mural Club, ingenuity first

SEE ALL NEWS

January 13, 2020

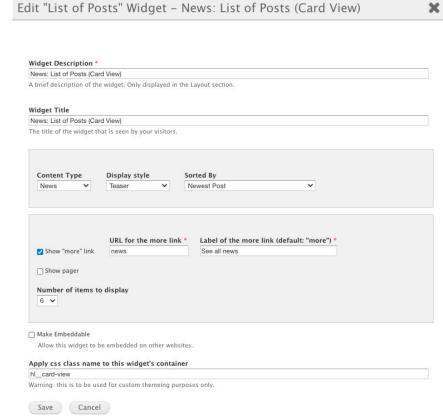
In past sessions of the Mural Club, Allston-Brighton students in grades six through eight spent eight weeks working with two instructors...



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

News

- 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

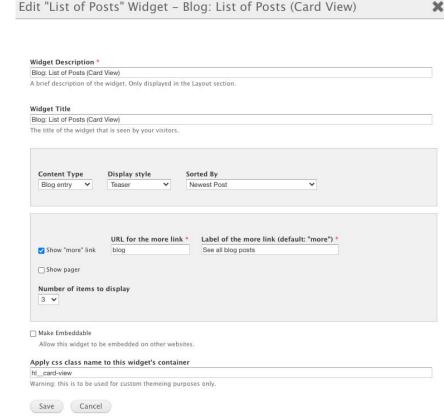
Ever wondered how people find the items they're looking for in the Widener Library stacks? Access Services & the Discovery to Delivery Working Group are collaborating on an in-person survey installed near the stacks exit to understand what information users take with them when locating an item on the 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+.

SEE ALL BLOG POSTS

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

Blog

- 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

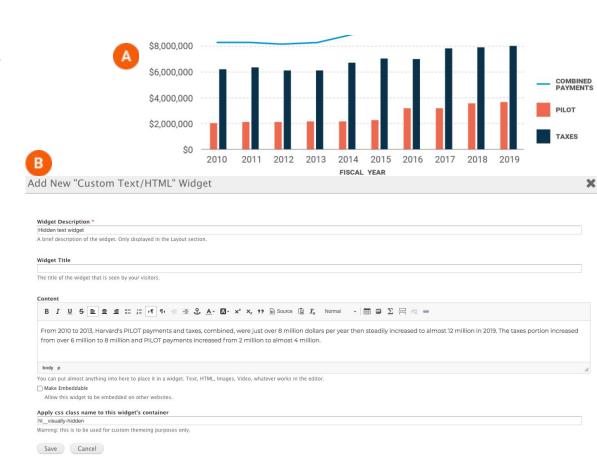


Visually hidden elements - for accessibility

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
 - Add the class "hl_visually-hidden" in the css class name field. This class can be applied to inline elements also -- a link, a table, etc. This gives a screen reader user more content when browsing.
 - c. 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

