

eBranch documentation

by the eBranch staff

Contents

| | | |
|----------|-------------------------------------------------|-----------|
| 1 | Let the documentation begin | 3 |
| 2 | Contents | 4 |
| 3 | Details | 8 |
| 4 | Mission Statement: | 9 |
| 5 | What does the eBranch do? | 10 |
| 6 | eBranch Knowledge Base & Tools | 11 |
| 7 | eBranch Team Approach | 12 |
| 8 | Emergency Communication Responsibilities | 13 |

Chapter 1

Let the documentation begin

TOC

Chapter 2

Contents

Mission Statement: **4**

What does the eBranch do? **4**

eBranch Knowledge Base & Tools **4**

eBranch Team Approach **5**

Emergency Communication Responsibilities **5**

Strategies and approaches **6**

Handy tips and things to remember **6**

Updating staff profiles/names **6**

Routine eBranch tasks **7**

MultiSearch / Library Search Admin Tool **10**

Reserves in Multisearch **10**

Web authors **13**

Training **13**

Authoring and editing **13**

Best practices **15**

Types of Web Authors + how we support them **15**

eBranch superpowers and how to wield them wisely **16**

Drupal: Adding an Advancement / Donate now / Give to the Library button **24**

Password / authentication on web pages **24**

Other odds and ends 26

Miscellaneous troubles that come up and how to shoot them **26**

Vanishing Attachments 26

Problems with Godot pages 27

Problems with CUFTS pages 27

Problems with Troy/Millennium pages 27

Structural changes, like taxonomies and menus, that don't seem to "take" 27

Digital sign in front door vestibule at Bennett Library **28**

New books list **28**

Computer availability tool **29**

Website migration 2015 leftover bits and bobs **29**

Webform data from old site: 29

Drupal 8 instructions (staff site) **29**

Location of old and new staff sites 29

Access to the staff site and user account creation 29

Roles and permissions 30

Nightly updates to keep access current 31

Personal SFU computing IDs that don't appear in the staff site's Drupal account list 32

Role accounts and the white list 33

Setting up access for a role account 33

Possible user confusion between role accounts and web author accounts 33

Creating a local, non-CAS account (an account where there is no SFU Computing ID) 33

- Megamenu 33
- Content types 34
- Webforms 34
- Incident reports 34
- Email notifications 34
- Search index configuration 35
- Search boxes on sets of pages 35
- Staff site search statistics in Piwik 35
- Opt for Drupal .html pages over attached files such as .pdf documents 35

Drupal 7 instructions (public site) **36**

- Site location 36
- Menus 36
- Menu editing 36
- Taxonomies 37
- Contexts 37
- Search boxes 38
- Content types 38
- Blogs 39
- Blog posts 39
- Blog taxonomy 40
- Blog roll 40
- Setting up a new blog 40
- Contact us 41
- Home pages 41
- News and events and FAQs 41
- Rotating images 41
- Forms/ webforms 42
- Attached file fields in forms 42
- Site-wide webform settings 42
- Image gallery 42
- FAQs 43

Systems wiki **43**

Personnel and staffing info 43

Vacation scheduling 43

Chapter 3

Details

Chapter 4

Mission Statement:

- A. We believe Library resources should be as **easy to use** as > possible. We value plain language, simple and intuitive layouts, > and **accessible** tools and resources in every sense of the word.
- B. Our focus is **end users**: students, faculty, staff, SFU > administrators, and the general public. In practice this includes > **supporting web authors** as well.
- C. The eBranch is **an important link between public services and > technical processes**. Some of the partners we work with most > closely:
 - Public services: Liaison librarians, SLC, RC, L & I, Loans, > Belzberg and Fraser locations.
 - Management office, including Graphics.
 - Technical services: Systems, and Collections.

Chapter 5

What does the eBranch do?

The eBranch has overall responsibility for user experience for the Library's online presence:

- Library Search
- Hours tool
- Blogs (Feedback and Staff blogs, plus blogs by individual > librarians)
- Workshops
- Other miscellaneous pages, such as: Librarian and other Library > Position Openings > (<http://www.lib.sfu.ca/about/positions>)

The eBranch provides training and support to the Library's authors:

- Evaluating and recommending improvements (at a high-level and to > individual pages) to increase usability and function, and > implementing the recommended changes.
- Assisting web authors to create and maintain webpages, online > resources, and posts to the Library webpages and social media.
- Writing, editing, formatting, and posting items to the Library's > website.
- Creating and supporting web forms.

The eBranch is the link between public services and Library Systems:

- Communicating internally to systems if the public cannot access our > services
- Communicating externally thru News and Events and Notices on the > Home Page

Chapter 6

eBranch Knowledge Base & Tools

- Software (e.g. Drupal)
- Usability and standards
- Writing for the web
- Online accessibility
- Web Authors Guidelines: > <http://staff.lib.sfu.ca/divisions/ebranch/publishing/writing>
- Using Drupal: > <http://staff.lib.sfu.ca/divisions/ebranch/publishing/drupal>
- eBranch Tools: > <http://staff.lib.sfu.ca/divisions/ebranch/tools>
 - must be logged in as an admin to access the content (note that > you will need the public or staff admin login depending on the > location)
- x: KeePass for passwords and also URLs for web admin functions

Chapter 7

eBranch Team Approach

- Our team includes web developers, librarians, UX professionals and a > manager.
- Information sharing:
 - Informal and frequent (as-needed) communication
 - staff web pages
 - Google Docs (be sure to share your Google ID)
 - X drive
 - P Keep: eBranch (less so)
 - Calendars: eBranch team members share calendars and keep them up > to date
- Working from home (or off-site): Let manager know and mark in > calendar

Chapter 8

Emergency Communication Responsibilities

- **Communicating in emergency situations— When disaster strikes or > snow procedures**
 1. In the event of an emergency an ADL or the UL will update the public > site's home page with an emergency message using the Emergency > page content type.
 2. **The eBranch is responsible for the hours tool reflecting our > hours during an emergency or snow closure.**
 3. **Wait to hear from the UL or an ADL before making changes to the > hours tool** or, if you think it a good idea, adding in an > emergency message. Don't make changes based on what SFU University > Communications states as their messaging can be ambiguous and we > don't wish to erroneously declare a library closed or its hours > truncated.
 4. Whoever sees a communication about changed campus hours first should > make the appropriate changes to the hours tool and let all of us > eBranch staff know that you're doing it so only one person is > updating hours at one time.
- **Responding to crises—e.g. a bug happens.** We are here to test, > test report, and communicate both ways
 1. Try to replicate the problem
 2. Acknowledge the issue – let the person know you are going to work > on it. Ask them to step away so that we can work on it (i.e. they > must stop editing the problem page)

3. Once you have a decent test or understand the problem, report it, > usually to Todd (or Kurt if it's a server issue). When in doubt, > try lib-sys. It is better to report than not to report.
4. Status updates to the person who initially reported the problem.
5. Repeat as necessary.

- **Communicating in emergency situations—e.g. server down**

1. Wait a couple of minutes. Often the issue is temporary and will fix > itself.
2. E-mail lib-sys to let them know about the problem. Mark as URGENT.

- **Communicating in (semi) emergency situations—Library Search, > Catalogue not working**

1. Create a News & Events item describing the problem, e.g. Library > Search is experiencing difficulties....

temporarysolution

- ... > We are working on the problem.” Then select “High Priority” so > that an Attention/warning icon will appear, and the item will stay > at the top of the display. (Sample wording: Library Search > experiencing problems: We are currently having problems with some > functionality in Library Search. We are working to resolve the > issue. If you receive an error message (such as Application Error) > when searching for books, journal articles, or media, you can > still use the Library > Catalogue > to find your resources.
2. If a Multisearch/Library Search problem, go to the Multisearch Admin > Tool (<http://search.lib.sfu.ca:8001/>) and select Notices; either > edit an existing notice or add a new one to have it appear > (prominently!) on the Library Search results pages.