Instructions: People

Concepts

We add a person's details once and make a relevant subset of those details show up wherever relevant in the site by adding specialties (and in some cases, key words) to the person.

We always add a person's details to the "people" section of the site. The reason for doing this is that many people are associated with more than one graduate program / institute / center / facility etc. The problem we had on the previous website was that all lists of people were manually constructed. So whenever their details changed, someone had to (a) remember all the places that person was listed and (b) change the details separately in each place [with all the possibilities for typos and inconsistencies that this generates]. In the current system, we change their details just once, and this automatically updates the relevant details wherever they are pulled in.

To add a person

1. Check that that person is not already on the website

    - Use the search facility to search for their name.

    - If their name shows up in the search results, click on it and jump to step 3 below.

    - If their name doesn't appear in the search listings (and be very sure about this—for example, that you have spelled it correctly; you should also try searching for their user ID), go to step 2 below.

2. Create the "person object"

    Go to the people section of the Huck Institutes website. If you have permission to add people to the site, you will see a green menu bar.

    In the green menu bar, click "add to folder" and select "Person" from the dropdown list that appears.

To edit a person

3. Edit the person object

   When you create a person (step 2) or edit an existing person (by navigating to that person's page and clicking the "edit" tab) you will get to a screen that contains 4 links: basic information, contact information, professional information, default (which is the screen you start on). Click the "basic information" link.

   a. Basic Information screen

      - *Access Account ID* (Required) If you don't know what this is (tip: you can often get it from the Penn State email address for the person), open a separate browser window, go to the main Penn State website and search for the person's name in "Penn State People", and see what is in the "Mail ID" for the person; you want the Mail ID that is in the form of two or three lowercase letters followed by two or more numbers (e.g. "xyz123", "abc89")

      - *First name* (Required) If the person also has a nickname, add it here in parentheses after the proper form of the name, e.g. "James (Jim)", "Pamela (Pam)".

      - *Last name* (Required)

      - *Suffix* (Optional) If the person has a suffix to their name, such as "Jr", "Sr", "IV", add it here

      - *Image* (Optional) If you want, you can upload a picture of the person. Please make sure it (a) shows their face clearly; (b) is no larger than 200px wide and 250px high (smaller is better: e.g. 100px by 100px is absolutely fine); (c) is saved at a resolution of 72px/inch

      - *Choose a category that best describes you* (Optional but highly recommended) Choose ONE of the categories. If you don't see a suitable category listed, contact the Huck Institutes web team. Note that there is no "staff" category: instead, there are several more detailed categories (e.g. graduate program administration, technical support). Note that technical staff in facilities should be added to "technical support"; directors of facilities should be added to "faculty". If someone has left the Huck Institutes, choose "People who used to be associated with the Huck Institutes…"

      - *Other websites about you* (Optional) You can specify as many sites as you like; just make sure that you put each URL on a separate line, and include the full URL (including http:// or https://)

      Click "next" to move to the next screen

b. Contact Information screen

- *Email* (Optional but highly recommended) Enter the person's full email address (e.g. abc123@psu.edu or webguru@psu.edu). Only one email address is allowed here.

- *Campus* (Optional but highly recommended) Select the campus where the person is based. Contact the Huck Institutes web team if you don't see an appropriate campus listed.

- *Office Street Address, City, State, Postal code, Fax number* Although these fields are available, we don't recommend that they are filled in unless the person is a staff member associated with the Huck Institutes. (faculty contact details are typically given on their departmental or personal websites, which we provide a link to, so it is redundant for us to have details as well – it is more for us to have to maintain)

- *Office phone* (Optional but highly recommended for staff and faculty) Enter a valid phone number for the person, INCLUDING THE AREA CODE. Use dashes to separate groups of numbers, e.g. 814-865-1234 or 717-531-9876

Click "next" to move to the next screen

c. Professional Information Screen

- *Job Titles* (Optional but highly recommended for staff and faculty) If the person has more than one job title, enter one per line. Most graduate students and postdocs won't have job titles: just leave this field blank for them.

- *Responsibilities/Research interests*. This is an "in a nutshell" summary. Write for the web: headings, bullet points, short sentences, active voice. Make sure the content of this field reflects whatever is entered as the summary for each of the specialty fields associated with the person (see #6 below).

- *Education*. IGNORE THIS BOX

- *Specialties*. This is where we indicate the area(s) that the person is involved with (e.g. Ecology, neuroscience, cytometry). See step 3 below for details of how to assign specialties. Once specialties are assigned, press "save".

4. To assign a person one or more specialties

   The way we make people be listed in different places on the site is to assign them relevant specialties (and in some cases, keywords).

   - In the “Professional Information” screen, scroll down to the box titled “Specialties”. If you didn’t just create the person object, you will probably see one or more specialties already listed in this box. For example, if you want to make the person show up in the faculty list for a particular graduate program, the person may also be associated with other graduate programs (so will already have specialties listed against him/her).

   - Click the “browse” button to open a new window containing a list of specialties you can choose from. This window may open to simply show a breadcrumb trail, “you are here: home—> people—> John Doe”. If this is the case, click the “people” link in this breadcrumb trail, then in the content that appears, click on the “Find someone in” link. This will bring up a list of specialties.

   - Click “Insert” to the right of a specialty name to add a specialty to the person. You should see a confirmation message appear in an orange bar at the top of the window, telling you that a specialty reference has been added.

   - Some specialties contain subspecialties. E.g. “Clinical neuroscience” is a subspecialty of “Neuroscience”. If you want to add subspecialties to a person, FIRST MAKE SURE YOU HAVE ADDED THE RELEVANT SPECIALTY. Then, click on the name of the specialty to bring up a list of the subspecialties it contains. Click the “insert” link next to the name of the subspecialty you want to assign.

   - When you are finished assigning specialties and subspecialties, you can toggle back to the window containing the person’s details. In the “Specialties” box, you should see the specialties and subspecialties you just added (in addition to whatever was there already).

   - If you’re happy with this list, make sure all the specialty names are highlighted and press “save”. **BEWARE: If you unhighlight the name of a specialty before pressing “save”, the specialty will be removed from the person**. So be VERY CAREFUL that you don’t inadvertently remove a specialty before saving. For instance, if you are editing a person to add “neuroscience” as a specialty, and the person already has “molecular medicine” listed in the “Specialties” box, make sure that both “molecular medicine” and “neuroscience” are showing in the box AND HIGHLIGHTED before you press “save”.

- *Tip*: If you want to assign specialties to more than one person, you can leave open the separate window containing the list of specialties. As long as you work in a constant browser tab to create and edit person objects, the separate window listing the specialty information will know where to insert the specialty references. If you don't get a confirmation message after adding a specialty reference, you will know it is no longer working, and you need to shut this window and press the "browse" button on the person object again (see above).

5. To remove a specialty from someone

   BE VERY SURE YOU WANT TO DO THIS.

   - In the "Professional Information" screen, scroll down to the box titled "Specialties".
   - Click on the specialty you want to remove, then click the button labeled "remove selected items". The specialty you highlighted should disappear.
   - Before saving, check that the remaining list of specialties is correct, and that they are all highlighted (see the caveat in #4 above).

6. Add a "summary" for each specialty

   Once you have saved the person, as a logged in user with appropriate permissions, you should be able to see a list of specialties on the person's page in the "people" section (you may need to scroll down to see this list). Don't worry about the order the the specialties appear in—the public can't see this list. It's just here to help you.

   Next to each of the specialties you just added should be a hyperlink: *"[Add a brief summary of your research/responsibilities in this area]".*

   - Click on this link to bring up a new screen containing a box where you can add a short summary (up to 256 characters). At the moment, this box doesn't allow any special characters (e.g. italics) or hyperlinks. (It will at some point…)
   - Once you have added a summary, save.

   If you want to edit an existing summary, you can do so—just click on the link next to the summary that says *"[Edit this summary]".*

Note that:

- If the person is associated with more than one specialty, they can have a different wording for each summary. For example, if a faculty member is associated with both molecular medicine and neuroscience graduate programs, they may wish to emphasize one aspect of their research to prospective students in one program and another aspect of their research to students in the other program.

- The person's "Responsibilities/Research interests" field in the "Professional information" edit screen should reflect the totality of what is entered into the "summary" fields for all the specialties assigned to the person. This "Responsibilities/Research interests" field can contain more information than the specialty fields, and can be formatted differently, but it should support (and not contradict) the summaries.

7. To assign keywords to a person

If the person you are creating/editing is a contact person for a graduate program (e.g. the graduate program Chair, or a staff assistant), we need to assign keywords to make them show up in the relevant list of contact people.

- Click on the "properties" tab for the person.

- You will see a box containing keywords (you can scroll up and down to show more). Some keywords may already be selected. LEAVE THESE IN PLACE UNLESS YOU ARE ABSOLUTELY SURE THEY CAN BE ALTERED.

- Be aware that the person may well be associated with other graduate programs than the one you are concerned with, so you may see other words highlighted. This is fine—leave these other words highlighted.

- Hold down the ctrl key (on a PC) or the apple key (on a Mac)* and click "contact for xx " (choose the relevant contact keyword).

- If you click the wrong keyword by mistake, just keep holding the ctrl key or apple key down and click the mistakenly-selected keyword again to unselect it.

- If you forget to hold down the ctrl key or apple key, don't worry—just press "cancel" rather than "save" and try again.

- Once you have selected an appropriate set of keywords, press "save"

8. Check that the person appears in the places they should

   Navigate to the places you want the person to appear and check that their details show up.

   - If they don't show up, check that you have assigned specialties (#4) and keywords (#6) correctly.

   - If they still don't show up, contact the Huck Institutes web team.

9. NEVER DELETE A PERSON

If you want to get rid of a person from a listing somewhere on the site

Just remove the relevant specialty (#5) and keywords. NEVER DELETE THEM (leave this to the Huck Institutes web team).

If the person has left the University, or is no longer associated with the Huck Institutes

1. In the "Basic Information" screen:

   a. Change their "classification" to "People who used to be associated with the Huck Institutes…". This will keep the person in our system (so we can see what they used to be associated with) but stops them displaying in lists of current people.

   b. If they have an new website in their new position, add that URL in here instead of what's there already.

2. In the "Contact Information" screen, delete everything except their email address. That is, their campus affiliation plus phone/fax numbers, office addresses etc. We retain the email address because Penn State lets people retain the address for several months after they leave.

3. In the "Professional Information" screen:

   a. Change their job title to something appropriate. For example "Ex-Ecology graduate student (graduated 2008)". Or "Professor in Biology until 2008".

   b. Delete everything in the "Responsibilities/Research Interests" field. We retain a summary of their activities in the specialty description(s) [research topic(s)] for the person. Note: we do NOT want to delete the association(s) between the person and the specialty(ies) they belong to, because this gives us information about how they used to be associated with the Huck Institutes.

4. [Still thinking about this] If the person is a staff person, set the "expiration date" (in the "properties" tab) so that the content is expired.