# CFAES Drupal 9 Migration Video Script

## Slide 1: Introduction

Hello, my name is Eric Owens and I am the Lead Developer on the CFAES Web Team. As you may or may not know, our websites are built on a content management system called Drupal. We are working on transitioning websites from version 7 or Drupal to version 9.

## Slide 2 Who is this presentation for:

This transition will make some changes to how content is created and managed. This video is meant to go over the process of how your website will be transitioned and to give an overview of the new system.

This video is meant to aid existing content editors in the CFAES Drupal 7 system as their site is migrated. It is not intended to replace our normal training sessions for new content managers.

New content editors or Drupal 7 Content Editors that would like a more complete training should sign up for a Drupal 9 Basic Website Training session by visiting the CFAES Web Services website at web.cfaes.ohio-state.edu.

## Slide 3 In this video we will discuss

In this video we will discuss:

1. The migration process and what to expect.
2. Changes to the CFAES platform, how to use the new interface to manage content, including how to use the new CFAES Page Builder to create content.
3. How legacy migrated content is being handled.
4. Where to find some site settings that have either moved or are newly available.
5. And Finally next steps in the migration process as well as information about accessibility training from the university that will be assigned to you during this transition.

## Slide 4 The Migration Process

Your website is likely already in the process of being migrated if you are seeing this presentation. It will come to you as part of an email outlining this process. To start the process a test copy of your website will be migrated into the new environment. A link to this copy should be available in the email you received. Along with this link will be any additional information needed to login. At the time of this recording university logins are not working on the temporary test websites and you may need to use a temporary login when reviewing your website. Info on this will be provided in the email.

Please visit the test website and look over the content. You can also use this test site to experiment with the new content editor. This website will be completely overwritten when the actual migration occurs. While it is expected that there may be some adjustments you will need to make to your content after the migration if you see anything that you think may be a problem and is not migrating properly please contact us so we can make adjustments before your live migration.

We leave a two week window for you to review the test site, as well as to review this presentation and the available online documentation. If there is some reason that we should not migrate your website on the date it is scheduled please contact us so that we can work on rescheduling the date.

When the date of your migration comes your website will be unavailable for a few hours as we complete the migration. Details on that time window will be included in the email your receive. During that time a fresh migration of the website content will be performed and the live address moved to the new server.

You will be sent the address of a private copy of your Drupal 7 website for reference which will be kept online for at least the next 6 months.

## Slide 5: What will and will not migrate

Most website content, including pages, news articles, hero images, and person profiles will migrate automatically. However Events will not be migrated. Any upcoming events will need to be readded manually to the migrated website. The now retired homepage slideshow will not be migrated.

## Slide 6: The Page Builder and new content interface.

To demonstrate the new website and the differences in the interface I am going to switch to a website window.

## SWITCH WINDOWS: Website Homepage, Demo Login

<https://wmsandbox.cfaes.ohio-state.edu/>

Just like in Drupal 7 many of our websites will have a login button in the footer, but if they do not the process is the same add /user to the end of the URL.

To login just as in Drupal 7 click the login with your OSU User Name.# link

Once logged in similar to Drupal 7 you will see a profile page with your username and a grey menu bar at the top.

### THE MENU BAR

On the right of the menu bar there is an icon with an arrow and a line. This will switch the menu bar back and forth between a vertical and a horizontal orientation.

There are two menus available on this bar, the user menu and the manage menu.

The user menu is accessed by clicking your user name in the top right corner. Clicking with toggle the menus visibility. This menu has links for editing your profile and logging out of the website.

The manage menu is accessed by clicking manage in the top left of the website. It will also toggle visibility. This manage menu is very similar to what you would have encountered in Drupal 7.

NAVIGATE TO BOBCAT

Editing content works very much like it did previously, you can navigate to the content and hit edit, or click content in the manage menu to access the content browser.

When editing content publishing options will now be on the right of the edit form. These options were previously at the bottom of the form. They are very similar to what you would have had before. Note that Published is now an isolated checkbox and any available promotion options such as Sticky or promote to front page will be in a Promotion Options section when available.

CREATE A NEW PAGE

<https://wmsandbox.cfaes.ohio-state.edu/node/add/page>

Just as before creating new content is done by going to add content and the type you would like to create under content on the manage menu.

As before My content will need a title which I can add in the title field.

You will notice that the CKEditor Body field is gone, in it’s place is the CFAES Page Builder. In most content types the Page Builder will replace the CKEditor in main content fields.

The page builder uses a drupal system called Paragraphs to allow you to select from an available list of templates and stack them to create your content.

I am going to demo making some basic blocks here, however documentation for using the page builder as well as a sample of all of the available blocks is available on the CFAES Web Services Website <https://web.cfaes.ohio-state.edu>

CREATE A Text Block

<https://en.wikipedia.org/wiki/Ohio_State_University>

Many pages can be created with a single text block. To create a text block I just select “Add Text” from the page builder drop down. This provides me with a familiar CKEditor interface for adding and formatting text.

Just as before I can source text from word documents and other websites. All text will now paste as plain text and will need to be formatted within the website.

The CKEditor will allow you to format headlines as needed, create links, as well as common text styling and bulleted lists. Any further formatting such as integrating images and videos will need to be done using the appropriate layout blocks.

Adding additional Blocks is easy, just select the next block you need from the dropdown, in this case I will be starting another section so I will add a heading block. I just need to click it since it is the default.

CREATE A HEADING BLOCK

Here I am provided with the fields necessary to make a heading, as well as the option to make my heading a link. I am purposely misnaming this section so that I can demonstrate reordering these sections. I select the color, so that I stay consistent with my previous heading.

CREATE an Image Row Block

In this section I will Add a row of images

Switch to sample page:

An image row can create a single row of images or an entire grid of images, you do this by adding images and defining how many will appear on each row. Here I am just going to do two.

For each image I add the file, add appropriate alt text, and select an image size. Images are proportional in these templates and we have provided options for small, medium, or large sizes. In the case of image rows the number of images per row is going to define your size really so I just leave it on medium.

Optionally you can add a link or a caption for your image.

To add the next image, I click add Image

As I said Im just adding 2 here but you could add as many as you like.

Once I have added my images and selected the number I want per row, I decide to save my page to inspect it. There is a save button at the bottom of the form, but remember if you need to adjust publishing options that is on the top right. There is another save button provided there as well.

Once saved I can see how the builder stacks the two blocks I created to render a full layout.

Lets hit edit to keep building the page and add a block with an image and text.

When I return to the editor you can see that now each of the blocks I have created are collapsed so that I can see the full page content better. You can toggle individual blocks with the edit button.

Or the whole list with the edit all button, when expanded these then change to collapse and collapse all.

First to make my new section I again add a header

And now I add an image with text. This block will have an image to the right or left with text wrapping around it.

I need to choose a position for the image, upload the file and then choose a size as well as adding alternative text. As before with the image row optionally I can add a caption or a link to an image as I need to. Here I will add a caption.

I am also presented with a text block with a CKEditor interface. Here I can add text to wrap around the image as well as use the heading formatting dropdown to make sub sections within my text block.

Again I hit save to inspect the page.

Lets edit the page and fix our section order.

When I look at the blocks collapsed there are crosshairs to the left, I can use these to drag and drop the blocks to alter their order.

OR

Similar to menus and such in Drupal 7 I can click “Show row weights” in the top right and adjust the number weights of each row to create the order I need.

Once I have them ordered properly, I click Save.

Samples of each block are available on the Web Services Website. If you would like a more complete demonstration of the Page Builder, you can sign up for a Drupal 9 Basic Training upcoming classes are listed on the Web Services website as well.

SITE SETTINGS

In drupal 7 there were options listed under the Structure menu for Person Listings and Give Now links. There may be other settings that were provided under structure for some optional modules. Most of those settings you will now find under a CFAES Settings Menu that is nested under configuration, these work very similar to in the past they have just been moved.

LEGACY CONTENT – RETURN TO The Bobcat page.

Most legacy content will migrate to the website smoothly, we have put this content into a separate field and brought over the original styles with it.

When you edit a legacy page you will see the page builder field, and then after it a “Legacy Body” field. This legacy body field has a CKEditor interface to allow you to make clerical updates to these pages as needed. However, over time these pages need to be transitioned to the Page Builder interface. You would do that by recreating the content in the page builder copying and pasting elements from the original below it.

Once you start making page builder blocks the legacy content will no longer be shown on the published page. It will still be available in your edit form to allow you to refer to it when remaking the page.

There will eventually be a phased retirement of this legacy content. There will also be accessibility scans of content which may lead to content that needs to be moved on a priority basis. The hope is that the majority of this legacy content will be moved naturally as content needs revisions over time but you will want to keep in mind a goal of moving your content over to the new system.

BACK to the SLIDESHOW

SLIDE 7 Next Steps

Please take some time to look through the test migration of your website. Let us know if you find any issues with the migration so we can help deal with those before migrating the live website.

As we said earlier this test site is just a test, and will be overwritten when the actual migration occurs, so it would be a great opportunity to experiment with the new page builder to be ready for maintaining your content going forward.

Events will not be migrated. You will want to take a look at your website and see what upcoming or past events you will need to recreate after to move.

If you want a more complete rundown on managing website content in the new system upcoming trainings are available on web.cfaes.ohio-state.edu

You will be assigned Web Content Editor Training within the BuckeyeLearn System and given a six month deadline to complete it. It is important to be in compliance with the University Digital Accessibility Policy that all our web editors complete this training.

Slide 8 Thank you

The Web Team wants to thank you for your patience and cooperation in the process. I hope youre happy in the new system and you find it an easier and more versitle system creating websites for the college.

If you have questions about your website or this process never hesitate to reach out to us through the helpdesk by emailing cfaes-ithelp@osu.edu.