Duke

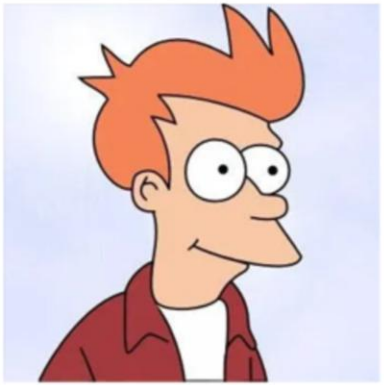
TRINITY COLLEGE OF ARTS AND SCIENCES

Website editor training series

Primary Faculty

[Hubert J. Farnsworth]

Professor of Mad Science



[Philip J. Fry]

Instructor of Time Travel and Pizza Delivery

[Dr. John A. Zoidberg]

Medical Specialist

- Primary Faculty
- Secondary Faculty
- Graduate Faculty
- Emeritus Faculty
- Affiliated Faculty
- Graduate Students
- Postdocs
- Department Staff

Managing Member Profiles

…what editors control (and what they don’t)

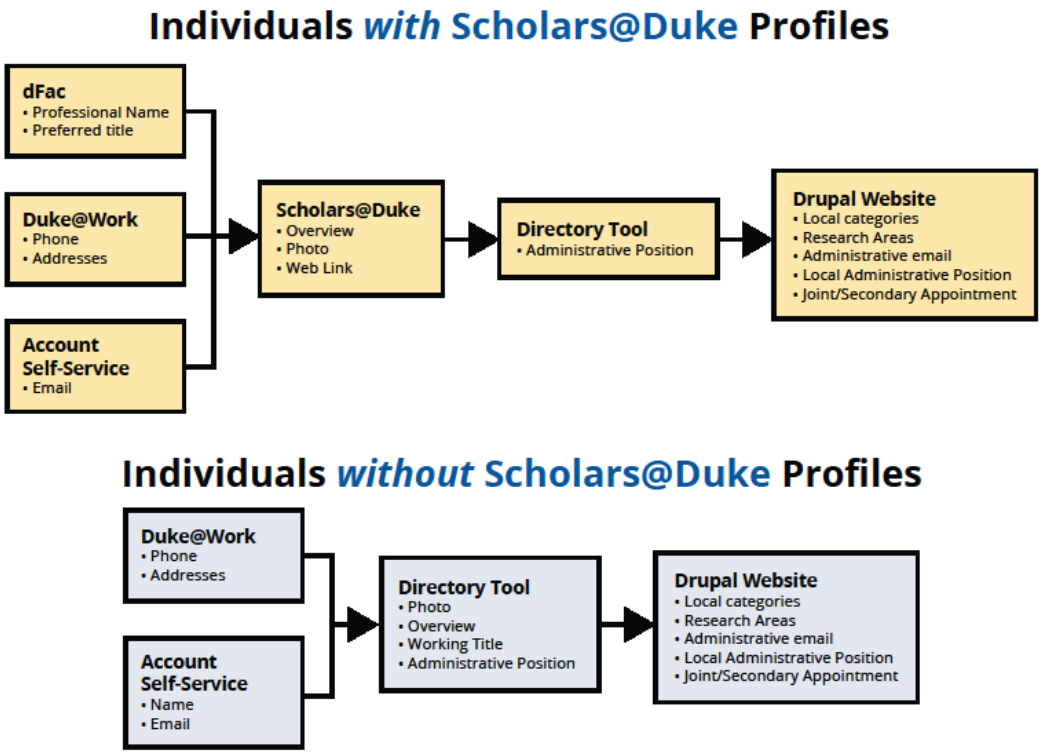
Agenda

- Why is this so confusing?
- Data flow into Drupal
- How profiles are added
- Trinity Directory Tool
- Classes vs. Categories
- Local fields
- What you cannot edit
- How and where profiles appear on pages
- Things that make your job more difficult
- Troubleshooting tips
- Resources
- Questions?

Why This Is Confusing?

- Profiles don't live only in Drupal
- Multiple systems are involved
- Changes don't always appear immediately
- Editors can manage where profiles display on the site, but profile data must almost always be changed at its source

The Big Picture: Data flow into Drupal



How Profiles Are Added

Faculty (most common)

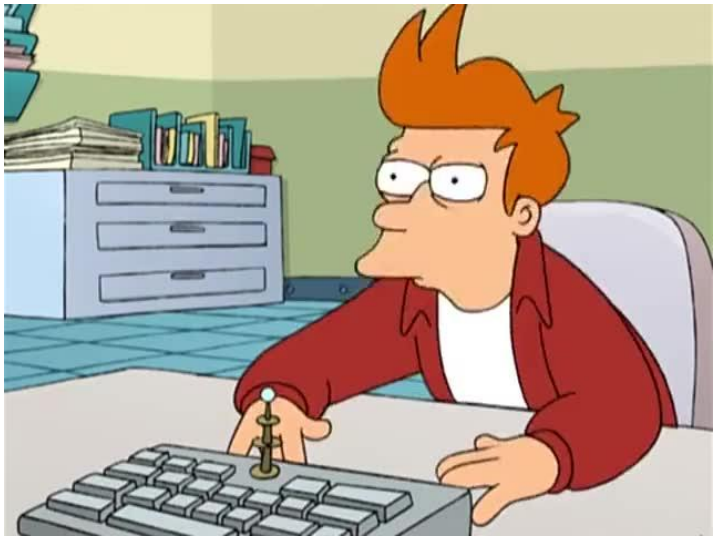
- Scholars => Trinity Directory Tool => Drupal

Staff / non-Scholars profiles

- Trinity Directory Tool => Drupal

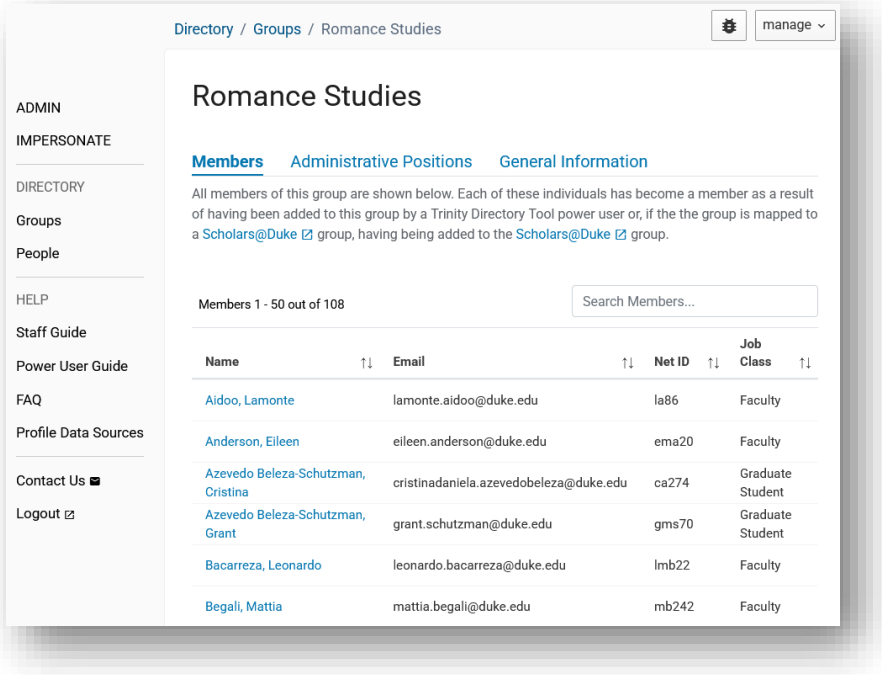
Local profiles

- Created directly in Drupal (not recommended)
- Very rare use cases (non-Duke visiting faculty)



Trinity Directory Tool

- Manages group memberships
- Manages Administrative Positions
- Manages staff and other non-faculty profile data
- Manages courses displayed from course catalog
- Data can be managed by power users and staff (limited)
- Has extensive help documentation inside the application for power users and staff



Classes vs. Categories

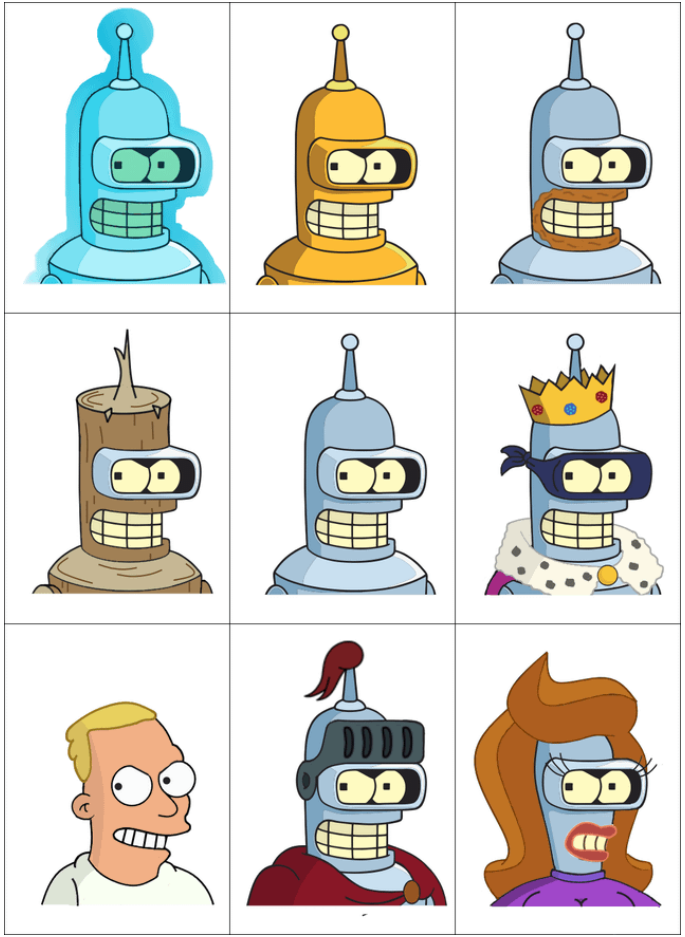
Imported data from HR and dFac

Classes

- Faculty
- Staff
- Postdoctoral Fellows
- Graduate Students

Categories (faculty only)

- Primary Faculty
- Secondary Faculty
- Joint Faculty



The Local Fields

Data managed in Drupal, not imported

Local S@D category

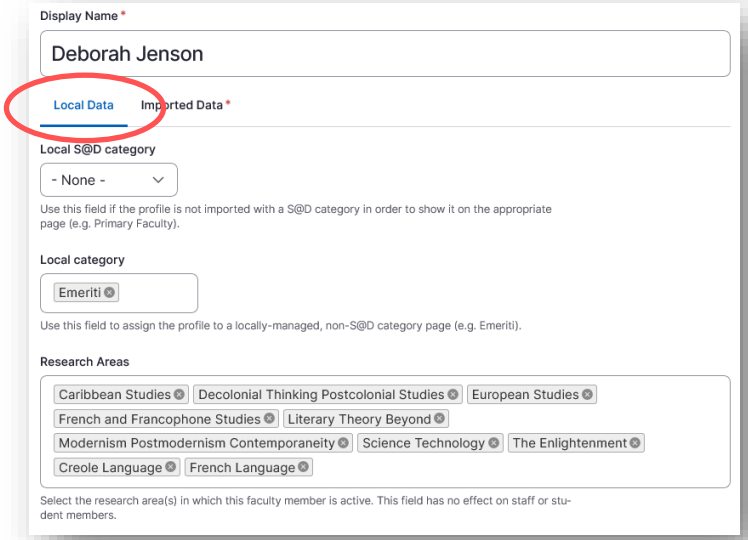
- Assign category when none exists
- Common for affiliated faculty

Local category

- Override or create custom groupings (e.g. Emeriti)

Research Areas

- Controls profile groupings on research pages



The Local Fields

Data managed in Drupal, not imported

Administrative email

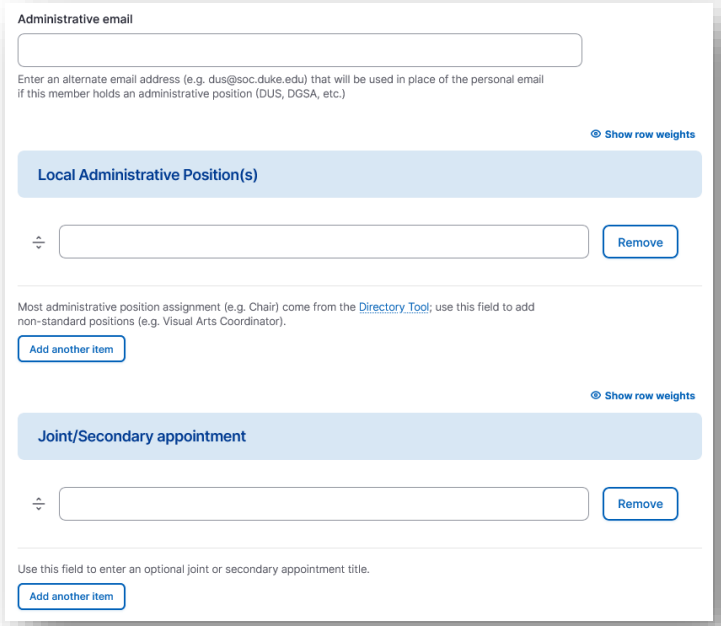
- Used in place of the personal email if this member holds an administrative position

Local Administrative Position(s)

- Use this field to add non-standard positions

Joint/Secondary appointment

- Use this field to enter an optional joint or secondary appointment title



What You Cannot Edit

Local Data vs. Imported Data

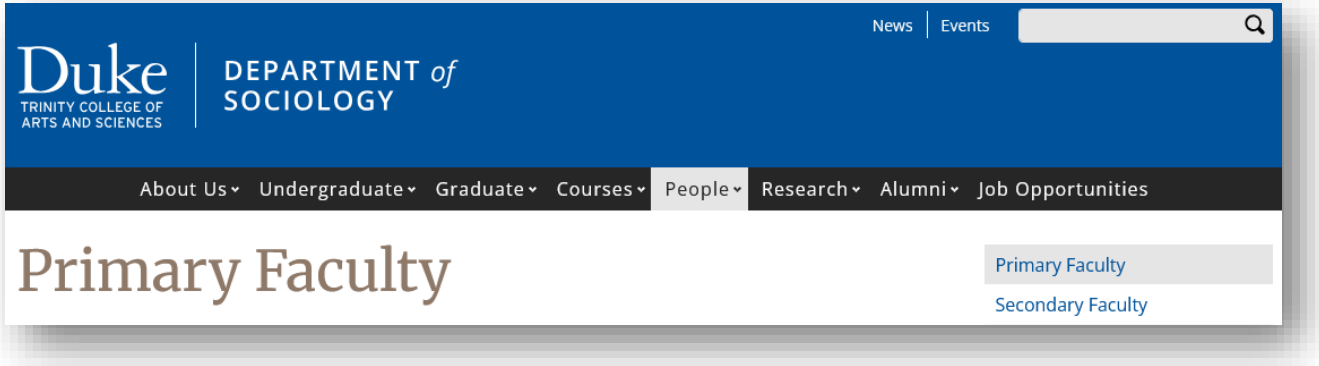
If the field is not on the Local Data tab, it can't be edited in Drupal!

- Name: dFac (faculty), Account Self-service (staff)
- Appointment title (faculty): dFac
- Working title (staff): Trinity Directory Tool
- Email (faculty and staff): Account Self-service

How Profiles Appear on Pages

Pages are driven by classes and categories, for example:

- /people/staff => profiles with the class of "Staff"
- /people/appointed-faculty/primary-faculty => faculty profiles with the category of "Primary Faculty"



Things that will make your job more difficult

- Staff profiles in Scholars@Duke
- Customizing your faculty groupings and categorizations
- Adding faculty that don’t have a dFac appointment in your department

Troubleshooting tips

New faculty member not showing

- Check Scholars group
- Wait for data sync (24 hrs. Can be expedited)
- Check category

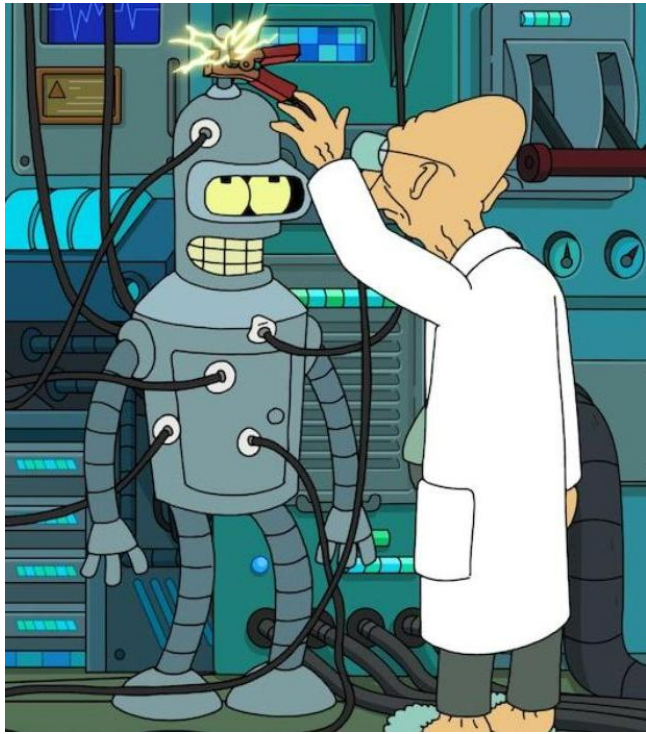
Faculty showing on wrong page

- Check Local category override

Staff member missing

- Check Trinity Directory Tool and add them if missing

Contact trinitywebsupport@duke.edu



In Conclusion...

- Profiles come from external systems
- Drupal controls display, not source data
- Local fields are your main tool on your website
- Resources can be found in our Training and Documentation website: https://drupal.trinity.duke.edu/
- Need help? Contact us at trinitywebsupport@duke.edu

Resources

Managing Member Profiles:
https://drupal.trinity.duke.edu/how-to/manage/people

The Trinity Directory Tool and Member Management:
https://drupal.trinity.duke.edu/how-to/manage/people/directory-tool

Reorganizing Your "People" Section:
https://drupal.trinity.duke.edu/how-to/manage/people/reorganize

Questions?

...also,

Thank you!