Drupal Overview and Basic Training
*Version 1.3 / July 2011*

**I. Introduction**

**What is a CMS?**
A content management system (CMS) is a Web-based application powered by a database that allows users to more easily create and maintain their Web sites.

If you've used Facebook or blogging software like WordPress, MoveableType or Blogger, you've already been using a type of CMS.

**What is Drupal?**
The University of Southern Mississippi has chosen as its CMS an open-source product called Drupal. Open-source software requires no licensing fees to use.

Campus users will no longer need Dreamweaver to build their sites; instead, they can do this through their Web browsers.

Users will input content into Drupal in what amounts to pre-defined online forms. Each form has a different function and therefore different fields depending on its purpose – a form to create a page, a faculty profile, a text block, a video file, etc.

Access to Drupal is based on individual SOAR user name/password.

**II. Information for New Users**

**Views and screen shots**
As much as possible, we’ll provide screen shots to illustrate these instructions.

It’s important to understand that some screen shots will illustrate the public face of a Drupal-built site displays; others will illustrate the user, or edit, view in creating and managing content inside Drupal. We will label illustrations accordingly.

**Groups & Roles**
USM’s Drupal installation is based on groups to manage access and users. Each group represents a site.
Each user in Drupal has a role that defines his/her level of access to the group in order to create and edit content. Roles are administrator and author.

University Communications sets up a group for each Website and authenticates an initial administrator into Drupal. (See Logging In, Pages 2-3)

If someone is responsible for more than one site, he/she can be set up as an administrator of multiple groups. In addition, multiple administrators can be set up for a single group.

Accountability for site users is decentralized: Group administrators have access to add and remove as many users as needed, including students.

Administrators have a higher-level of access than non-administrators, who are known as authors. Authors can create and edit their own content, but cannot access content created by other authors or by an administrator.

**Server Access: Development & Production**

Drupal includes two Web servers. The first is the “live,” or production, server that delivers the pages that the rest of the world sees via the Web. The second is the testing, or development, server. The URLs are [http://eduprod.usm.edu](http://eduprod.usm.edu) (live) and [http://edudev.usm.edu](http://edudev.usm.edu) (testing).

**Update: To start, everyone will work directly off the live/production server.**

Users will receive access to both servers. The testing, or development, server is a “sandbox” – an environment where users play around to learn the system. Once your site is live, if you ever want to review how something looks or functions, upload it on the test server first.

Unlike with Dreamweaver, content is not created on the test server and moved to the live server. Instead, when users are ready to begin building their sites, they do so directly on the live server. Sites are filtered from search engines so they are invisible unless the URL is shared.

Once the new site is ready to launch, iTech will “point” away from your old site and to your new site in Drupal. If your Web address changes, iTech will also redirect your old URL to your new URL.

It’s likely that you may get a security warning of some type in navigating to either of these URLs. This is your browser attempting to steer you clear of possible trouble. But please just OK/accept the option to proceed. We recommend using Firefox or Chrome rather than Internet Explorer because of IE’s repetitive security warnings.
Logging in
1. To access the live server, go to [http://eduprod.usm.edu/user](http://eduprod.usm.edu/user) and input your SOAR user name and ID (including the ‘w’ in your empl ID). See Figure 1.

Figure 1 – User Login (in Drupal)

2. Let University Communications (geoff.locicero@usm.edu) know you have logged in, and you will be added as a group administrator.
3. Log back in and you will see a link to your group home page (or groups, if you have access to more than one). See Figure 2.

Figure 2 – Logged in View (in Drupal)
To access the testing server, go to [http://edudev.usm.edu/user](http://edudev.usm.edu/user). Repeat the process.

If you need to access either server from off-campus, you’ll be required to make a secure connection using an application called VPN. Visit [https://eaglenet.usm.edu/usm](https://eaglenet.usm.edu/usm) or [https://eaglenet.usm.edu/student](https://eaglenet.usm.edu/student) and log in with your SOAR credentials. *Note:* The VPN site will not load from on-campus.

**Logging out**
Go to [http://eduprod.usm.edu/logout](http://eduprod.usm.edu/logout) or [http://edudev.usm.edu/logout](http://edudev.usm.edu/logout).

**III. Drupal Terminology**

Reviewing a handful of key terms will provide a better understanding of Drupal.

**Group**
USM’s Drupal installation is based on groups to manage access and users. Each group represents a site.

Group creation will be more strictly controlled in Drupal. Individual faculty, academic courses, research groups and student groups, for example, will no longer be granted their own groups/sites.

Faculty and research content will be accommodated in academic department sites, unless a waiver is granted by the Provost or VP-Research.

Academic courses must be hosted through Blackboard. Student groups can be hosted as communities in CampusHUB.

**Modular**
Drupal is considered a *modular* system because it is based on a concept of building blocks. You will find that many elements of your site are made up of individual “content blocks” that have different functions. Because these blocks are modular and standardized, they can be re-used throughout your site.

**Node**
Just like a library is made up of thousands of individual items or records, each with its own unique ISBN or call number, your Drupal Website will be made up of hundreds – eventually, maybe thousands – of individual content items.

Each content item has a unique ID number. In Drupal, each item is known as a *node*.

Just like the items in a library’s collection include a range of materials – books, magazines, newspapers, DVDs – the nodes in Drupal represent a number of different content items: a page, a faculty profile, a text block, a video file, etc.
In terms of creating your Website, you can also think of a node as an atom or cell – it’s Drupal’s most basic building block. Drupal provides a framework or structure in which you place your content elements to build your site.

When you create or edit content, you will notice “node” in the URL string. No matter what you title your content, it will always retain the same node ID number.

**Content type**

You can think of a *content type* as a pre-defined template that serves a specific role. What does a content type look like? Each content type looks like an online form with fields into which you input your content. See *Figure 3*.

*Figure 3 – Content Type: Page (in Drupal)*

![Create Page Form](image)

Depending on the content type’s function, it will include different fields.

The page content type, for example, includes a variety of fields that you would want in building a Web page – a page title, the body field where you input your content, fields to upload an image or a file, etc.

Administrators currently have access to 12 different content types; authors have access to four content types.

For a summary of content types, see Section V.

**Menu**

Drupal refers to your primary navigational links as a *menu*. Menus always appear in the left column of pages. See *Figure 4.*
Drupal allows you to easily add pages to your menu as you create the pages. A separate menu view allows you to easily add to, remove or re-order all the pages in your menu.

More complex sites can include multiple menus (consult with University Communications for assistance).

**Parent & Child links**

The Drupal menu structure will accommodate up to three levels of links in a menu. A first-level link is known as a *parent link*; a second-level link is known as a *child link*. See *Figure 5*. 
In the case of three levels of navigation, a second-level link would be both a *child link* of the first level and a *parent link* of the third level.

**Filtered HTML/Full HTML**
Authors have *Filtered HTML* access to a limited formatting palette when inputting content into the body field of several content types, including Page. Authors can style content as bold or italic, create bulleted lists and insert page links. See *Figure 6*. 
Admins have *Full HTML* access to an expanded formatting palette. Admins’ formatting palette also includes a button to view the HTML source code, which is not available to authors. See *Figure 7*. 

**Figure 6 – Filtered HTML/Limited Formatting Palette (in Drupal)**

**Figure 7 – Full HTML/Expanded Formatting Palette (in Drupal)**
Dreamweaver (DW) users will recognize the formatting palette as somewhat comparable to DW’s *design view*, while the HTML button provides a view comparable to DW’s *source view*.

**Lightbox**
In the Drupal template, *lightbox* refers to a box that overlays an image in order to display the image larger or to display a video. Several content types use the lightbox feature. See *Figure 8*, a lightbox displaying over a home page slideshow.

*Figure 8 Lightbox for Video (Public View)*

**IV. Group Home Page**

From the group home page, an administrator will find links to create content, add members, view all content created for the group, and view the menu(s).

**Create Content**
Admins will see links to each content type they can create. See *Figure 9*. 
Authors will see a limited list – Faculty Profile, Page, Page with Gallery, Page with Video Gallery. Click to create a node that will represent a piece of content.

**Create Members**

1. Select the “members” link – circled in *Figure 9* (above).
2. Then select “Add Members” - *Figure 10* (below).
3. Input a user’s empl ID (including the ‘w”’) and confirm the addition of the user.

In the list view, select “Admin: Create” to make someone an admin, or “Admin: Remove” to take away admin rights and make someone an author. See *Figure 10*. 
View All Content
From the home page, select the “All Content” link. See Figure 5 (Page 7). You’ll see a list of every piece of content that has been created for the group, with the option to filter the view to see all items under any particular content type. See Figure 11.

Create Menus
By default, there is a primary menu for your group. Click the link, “Department of English.” See Figure 12.

For complex sites, you may need to create and employ multiple menus – see “add menu” tab in Figure 12 (and consult with University Communications for assistance).
You can view all the items in your menu, drag them up or down to re-order, drag them right to indent them as *Child Links* (or vice versa), or enable/disable items from displaying in a menu. See *Figure 13*.

**Figure 13 – User View of Menu Items (in Drupal)**

To add listings to the menu, select “add item.” See *Figure 13*.

Click the page title to view the page. Click edit to view or change the menu settings for that item. Menu settings include how the page is titled in the menu and its URL.

**Important update:** For parent items/links that are serving as headers for sub-pages, the best practice is to create a space-holder using “add item,” rather than creating an actual page. For the path field, input “node” (without quotes). This will work more efficiently than creating blank pages that are simply serving as labels.

**V. Using Content Types and Editing Content**

Unlike with Dreamweaver, in which users “post” or “upload” files to the server, Drupal users create and save content that is in the “publish” status.

The following content types are available to group admins:

- **Page**
  - > Example: [http://www.usm.edu/about/overview-facts](http://www.usm.edu/about/overview-facts)

- **Faculty Profile**
  - *Purpose:* Create a page with text, headshot, sidebar content, file attachment.
  - > [http://eduprod.usm.edu/testing/faculty/geoff-locicero](http://eduprod.usm.edu/testing/faculty/geoff-locicero)
Page with Gallery
Purpose: Create a gallery to display multiple photos. Create headline and short caption for each image. Images display as thumbnails with lightbox to view larger.
> Example: [http://www.usm.edu/admissions/gallery/photo-gallery-class](http://www.usm.edu/admissions/gallery/photo-gallery-class)

Page with Video Gallery
Purpose: Create a gallery to display multiple videos. Select from a listing of previously uploaded videos created using the Video Content type. Videos displays in lightbox.
> Example: [http://www.usm.edu/admissions/video/campus-video-tour](http://www.usm.edu/admissions/video/campus-video-tour)

Section Slideshow
Purpose: Main image on group home page. Can be a single image or up to 5 that rotate. Can link from image to a page or video lightbox.
> Example: [http://www.usm.edu/admissions](http://www.usm.edu/admissions) (main image window)

HTML block
Purpose: Multi-use block to input text and upload images/file attachments. Can be placed in multiple positions on home/inside pages. Can also be used to create custom block on home page to replace slideshow** - Discuss with University Communications.
> Example: [http://www.usm.edu/about/overview-facts](http://www.usm.edu/about/overview-facts) (right column)

Link Block
Purpose: Reference existing links in the system or upload your own links to create a block of links as a resource. Can be placed in multiple positions on home/inside pages.
> Example: [http://www.usm.edu/academics](http://www.usm.edu/academics) (bottom row, block 3)

Section Promo-URL Block
Purpose: Create visual promo element, with headline and text, that links to another page. Can be placed in multiple positions on home/inside pages.
> Example: [http://www.usm.edu/about](http://www.usm.edu/about) (bottom row, blocks 1-2)

Section Promo-Lightbox Image Block
Purpose: Create a visual promo element, with headline and text, that includes an embedded photo or video that displays as a lightbox overlay on click. Can be placed in multiple positions on home/inside pages.
> Examples: [http://www.usm.edu/about](http://www.usm.edu/about) (block 2) and [http://www.usm.edu/about/campus-planning](http://www.usm.edu/about/campus-planning) (right column blocks)

Feed Node
Purpose: Input a URL feed for news/events/blog posts to be referenced from Feed Block

Feed block
Purpose: Create a content element that displays RSS feed. User determines number of items to display. Can be placed in multiple positions on home/inside pages.
> Example: [http://www.usm.edu/athletics](http://www.usm.edu/athletics) (left column block)

Video
Purpose: Create individual video content element for use with three content types: 1) Reference from Page; 2) Reference from Page with Video Gallery; 3) Reference from a Section Promo-Lightbox.
> Example: [http://www.usm.edu/student-life/get-around](http://www.usm.edu/student-life/get-around)
**Accessing/editing content**
When logged in, users can navigate to pages, click on an edit button, and make changes to page content. Blocks assigned to a page are edited separately.

Admins will see an “All Content” link on the home page (Figure 11, Page 11) that allows them to see every piece of content in a group. See Figure 14.

![Figure 14 – Edit Page (in Drupal)](image)

**Content Status**
Content is published when it is completed and ready for public consumption. Content can be unpublished if it is incomplete or temporarily not needed.

Unpublished pages will not display in a menu or appear in search results.

Content can also be deleted permanently. Users will be prompted to ensure they want to delete the content. Deleted content cannot be retrieved.