

Introduction:

These exercises are part of the Oregon State University Drupal training provided by the Oregon State University Open Source Lab. Please complete the exercises before attending the training session using the “sandbox”/training site that CWS setup for you when you signed up for the training. The training is split into two parts: one for training authors which covers the basics of page creation, and one training for administrators and gatekeepers, those who have a bit more power over the site and are able to approve changes, etc. This document covers only the author training.

Along with these exercises, you should have also downloaded the training materials which includes content which will be used to create an example web site throughout the following exercises. The training materials are available online at the OSL's website: <http://osuosl.org/training/drupal/> The training site also may include updated materials and images not found in this document – check there for any updates.

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Why Drupal?:

Drupal is the content management system in wide use at Oregon State University. Using a content management system, or CMS, provides web administrators and content creators. One advantage is that users do not need to have a knowledge of HTML or other code used to create the pages. The campus Drupal installation allows for changes to the site to be sent to an approval queue where they can be approved, edited, or denied by an administrator allowing an easy way for multiple users to submit content to the site while leaving a small number of administrators with the ability to do quality control on the submitted content. Because page design is separated from content, a CMS easily keeps a consistent look and feel across the entire site.

Training Materials Layout:

The training materials are separated into multiple directories. The 'content' directory contains text files with content which will be used throughout the training to create an example web site. The 'files' directory contains images and PDF files which will be uploaded to the example web site.

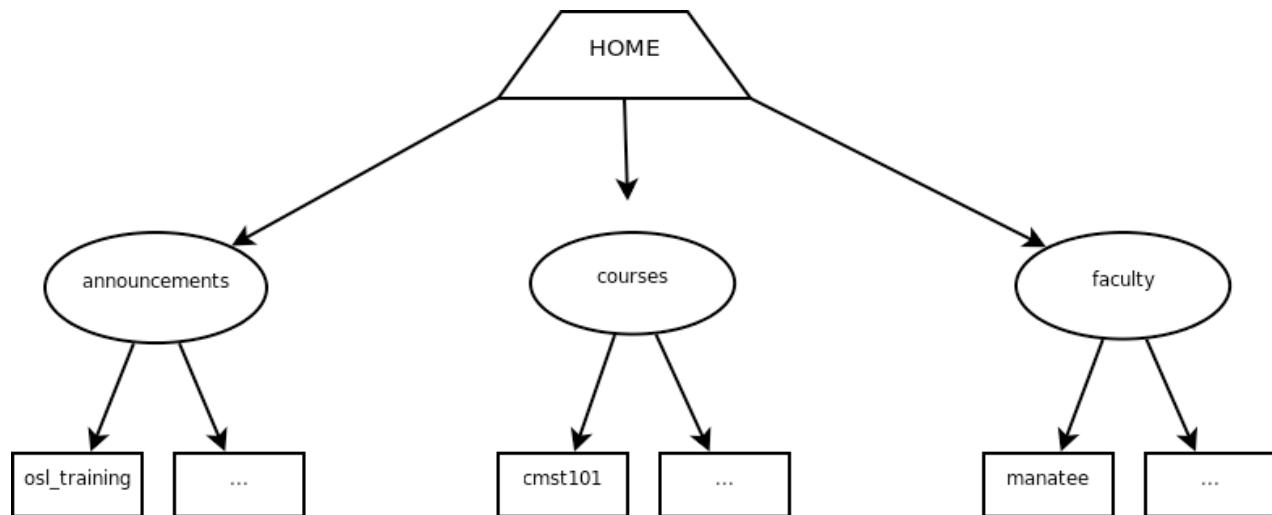
Log In:

For now, you can use the 'login' link provided. Once your site is live, it would be better to remove that link and either bookmark or manually enter the login URL. The URL to access your user login page is:
http://<your_site_URL>/user/login/

All logins on the campus Drupal instances are handled by the ONID system. To login, enter your ONID username and password. Once you login successfully, you will be redirected to your Drupal site.

Site Overview:

These training exercises will take you through the steps needed to create a basic web site. For our examples, we will be creating a web site for a fictitious academic department, the “Department of Content Management System Training”. The site will include a home page, a faculty list, a class list, a list of announcements, as well as individual faculty member and course pages. Here is a site map to give you an overview of the site:



Creating Content:

The first thing we'll do is add some content to our home page. Since this page already exists, we will be editing it instead of creating a new page. To edit the page, use the 'Edit' link in the tabs across the top of the page content. (see image)



Now we are on the editing page where we can change the page title and content as well as some other settings, for example, assigning a “more friendly” URL to the page.

First, we will edit the title of the page to something a bit more descriptive than “Home”. Since we are creating a web site for a department at the university, using the department's name for the title is a good idea. Open up the file index.txt which is part of the training materials. The first line of that file can be used as the title: “Department of Content Management System Training”. Enter that into the 'Title' field on the edit page.

Now, just below that you will see a graphical editor that has buttons for text formatting similar to MS Word or Open Office. Paste the remaining text from the index.txt file into the text box. This will become the content of our home page. Don't worry too much about the formatting of the text; we'll revisit that later.

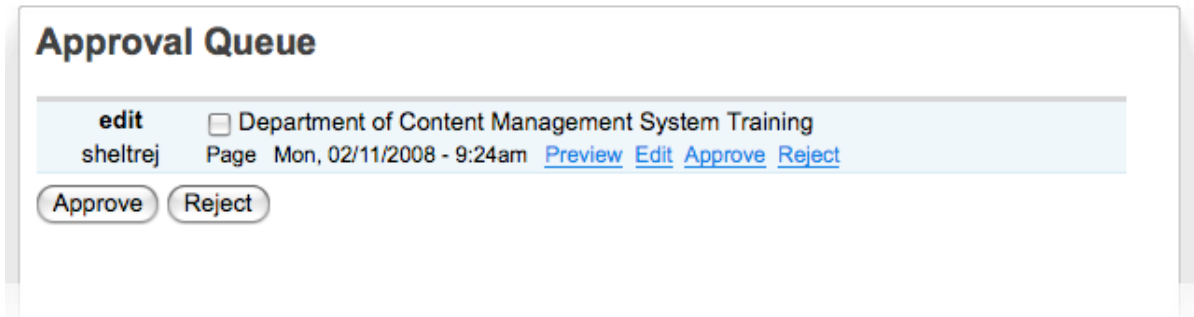
The 'Log Message' field is only visible to authors and the administrators/gatekeepers; other people visiting your site will never see it. Its intended use is to allow you to explain/log your changes. In this case, something along the lines of “Initial edit of CMST content” would make sense. Try to keep the log message concise so that it is clear to the other editors of the page what was changed with your submission.

If you click to expand the 'URL Path Settings' section, you will see an input field which allows you to enter a URL for this page to be accessed through. By default, the campus Drupal install uses 'home' as the default front page for your site, so we want to enter 'home' in that field if it is not there already.

Now that your edit is complete, you may want to click on the 'Preview' button in order to see your changes. If everything looks good, go ahead and use the 'Submit' button to submit your changes. The campus Drupal install requires all changes to be approved by an administrator/gatekeeper, so clicking on submit doesn't take effect immediately; instead, your changes will show up in the approval queue.

Approval Queue:

OSU Drupal installations hold page edits in an approval queue before they will appear on the site. Administrators and Gatekeepers have access to approve or deny items in the approval queue; authors can only submit changes, they are unable to approve them to be included on the site. Throughout this training you will need to pose as an administrator and approve your own edits even though you may not have access to do this on your live web site. All training sites are setup so that you have administrator access. In order to access the approval queue, click on the 'Administer' link on the left of your site. Then click on the 'Approval Queue' link which will be displayed under the 'Content management' links. This will take you to the approval queue which should look something like the following:



When there are multiple edits in the queue, they will all appear for approval. You have the option of either approving one edit by clicking the 'Approve' link, or you can approve multiple edits at the same time by checking the box next to each one you would like to approve, and then clicking the 'Approve' button at the bottom of the queue. For now, click on the 'Approve' link to approve your first edit. You will now be prompted to enter an optional message to be sent to the author. Since you are the author in this case, we can skip the message and simply click on 'Confirm Approval' to approve the edit. This will publish the edit to the site and remove the request from the approval queue. For future edits done during the training, you will need to approve the edit each time using the steps outlined here.

Create More Pages:

We have a few more pages to add to the site. We'll start by creating a course list. Under the Administrator navigation menu, click on the 'Create Content' link. This should bring up a page which allows you to select from various content types. In this case, we are going to be creating a full web page, so click on the 'Page' link. A page is considered to be more static than the other Drupal types.

The page we are creating is going to list all of the courses provided within the CMST department (who's web site we are creating). For the title of the page, enter 'CMST Courses'. The rest of the page content can be found in the file courses.txt. Copy and paste that text into the text editor on the Edit page.

For the Log message, this is a brand new page, so enter something like "Initial creation of course list". We'll want to add a custom URL for this page; since this is our course list, use 'courses' as the value for 'URL Path Settings'. This means that the page will be accessible from the URL `http://<your_site>/courses` instead of something as defined within Drupal such as `http://<your_site>/node/2`. You may need to uncheck the 'Automatic alias' box in order to enter text into the URL Path Settings field.

Click the 'Submit' button in order to submit your changes. Once your change is approved by an administrator/gatekeeper, your page will show up on the web site.

We have three more pages to add using the same steps as the courses page that we just created. Please create the following pages:

- 1) A faculty page using the text out of faculty.txt. The title of this page should be "CMST Faculty", and the path should be set to 'faculty'.
- 2) A course page for the CMST 101 course. The title of this page should be "CMST 101 - Introduction to Content Management Systems". The content of the page can be found in the file cmst101.txt. The URL Path Settings for this page will be slightly different than what we've used before because we would like it to show up as a sub-page to the courses page. In order to do this, we'll use a slash in the path name we enter, 'courses/cmst101'. This will allow the page to be accessed at the URL `http://<your_site_URL>/courses/cmst101` which is more intuitive to users than having it at `http://<your_site_URL>/cmst101`, for example.
- 3) A page for an individual faculty member. The title for this page should be "Professor S. C. Manatee". The text for the page is in the file manatee.txt. Similar to the CMST 101 page, we want this page to show up as a sub-page to /faculty, so for the URL Path Settings, enter 'faculty/manatee'.

Remember to visit the approval queue to approve each of the changes you've made!

Creating Internal Site Links:

We now have a number of pages setup but no way for our users to navigate between them. To solve this problem we'll start by creating links to and from the pages. In Drupal, it is not necessary to know the HTML code used to create links, we will be using the rich-text editor TinyMCE and have it create the links for us.

Start out on the home page. Initially there are two links we should add. The first is to change the text "Course List" in the 2nd paragraph into a link to the courses page. To do this, click on Edit to pull up the editing page. Use your mouse to highlight the "Course List" text. Once the text is highlighted, the Link buttons will become active (they were previously grayed out). Since we are linking to a page within our own site, it is easiest to use the "Add a Local Site Link" button which looks like a house with a chain on it. Click on the button and a window will pop up. Choose 'courses' from the list of pages, and click on the 'Insert' button to accept the choice and close the window. You will now see in the text editor that the text you selected is underlined as a link. Follow the same steps above, highlighting the text "Faculty List" and linking to the 'faculty' page.

There are more links to create on the other pages.

- 1) On the courses page, link the text 'CMST 101' to the page 'courses/cmst101'.
- 2) On the faculty page, link the text 'Professor S. C. Manatee' to the page 'faculty/manatee'.
- 3) On the manatee page, link the text 'CMST 101' to the page 'courses/cmst101'.
- 4) On the cmst101 page, link the text 'Prof. Manatee' to the page 'faculty/manatee'.

Upload and Link to a File:

Now that we've created links to other pages on a Drupal site, let's look at how to link to a file, such as a PDF, that you may want to upload to your site.

To upload a file to the site, click on the 'My Account' link in the Drupal user menu (which is only visible once you've logged in), and then on the 'Personal Files' tab which will appear at the top of the page. At the bottom of the page, there is a 'Browse...' button which will let you upload a file from your local machine to the web site. Click on the 'Browse...' button, navigate to the place on your local machine where you've saved the training materials, and select the file 'cmst101_syllabus.pdf'. The path to the file will now appear in the text field next to the 'Browse...' button. Next, click on the 'Upload File' button in order to upload the file to the web site. Now the file is available on the web site, we simply need to link to it.

Now we are going to add a link on the CMST 101 course page which will allow people to download the syllabus for that course. To do this, first go to the '/courses/cmst101' page on your site. Next, click on the 'Edit' tab in order to edit the content of that page. In the text editor, highlight the text 'syllabus is available here', and then click on the 'Insert/Edit Link' button (has an image of a chain on it). This will pop up a new window allowing you to specify information for the link you are creating. To the right of the 'Link URL' field, there is a button which allows you to browse the filesystem on the site. Click on that button and another window will pop up displaying a list of files on your site, including the PDF file that you just uploaded. Click on the filename 'cmst101_syllabus.pdf' in the top portion of the window. This will cause the name to be displayed in the bottom portion of the window, and had this been an image file such as a JPG, it would show a preview of the image. Now, click on the name again, but this time in the bottom portion of the window; this will select that file and close the window, returning you to the 'Insert/Edit link' window with the 'Link URL' field now filled out for you. Enter 'CMST 101 Syllabus' in the 'Title' field, and then click the 'Insert' button to add the new link. See the image below for details on the 'Insert/Edit link' window.

The image shows a 'General properties' dialog box for inserting a link. It has four tabs: 'General', 'Popup', 'Events', and 'Advanced'. The 'General' tab is active. Inside the dialog, there are several fields: 'Link URL' with the value '/osl/sites/default/files/cmst101_syllabus.pdf', 'Anchors' with a dropdown menu showing '---', 'Target' with a dropdown menu showing 'Open in this window / frame', 'Title' with the text 'CMST 101 Syllabus', and 'Class' with a dropdown menu showing '-- Not set --'. At the bottom of the dialog are two buttons: 'Insert' and 'Cancel'.

Once you click on 'Insert', you'll be returned to the Edit page. Enter a brief log message describing your change, and then click on 'Submit' to submit your changes for approval. Once the page is

approved, the link will show up on the page and people will be able to download the syllabus directly from the course page.

Add an Image:

Adding a strategically-placed image to a web page can help improve the appearance a great deal. We're going to add an image to Prof. Manatee's page to allow his students to know what he looks like.

Uploading an image to the site is very similar to how we uploaded a PDF file. Start by going to 'My Account', and then click on the 'Personal Files' tab. This time, upload the file 'manatee.jpg', which is the image we want to link to on the site. Once the file is uploaded (see the previous exercise if you forget the steps involved), navigate to the 'faculty/manatee' in your site and click on the 'Edit' tab to edit the page. In the edit box, click after the first line of text, and hit enter to insert a newline. Next, click on the 'Insert/edit image' button (button on the far left with an image of a tree). In the Image window that pops up, click on the 'Browse' button to the left of the Image URL field. Select 'manatee.jpg' in the file list, and then click on the image in the lower part of the window. That should return you to the 'Insert/edit image' window with the Image URL field filled in. Enter 'Professor Manatee' in the Image Description field, and then click on the 'Appearance' tab. For 'Alignment', select 'Bottom' from the drop-down list, everything else can be left as it is. The alignment setting allows you to configure how text will lineup with the image. Now, click the 'Insert' button to add the image to the page. The image should now appear in the edit box. Enter a message into the 'Log message' field to describe your changes, and then click on 'Submit' to submit your changes to the approval queue.

Create an Announcements Block:

The site is coming along nicely, but it would be nice to have a place on the home page to post announcements. In Drupal, this is accomplished by creating a 'Block'. The campus Drupal install is configured so that only administrators and gatekeepers can create 'Blocks', but authors can then add content to a block once it has been added to the site. So, for the purpose of this exercise, put on your "Administrator Hat" for a minute. Since you will automatically have administrator access to your training site, you don't have to do anything – just remember when working on your department's web site that if you only have 'author' access, you won't be able to create a block; you'll need to have your department's administrator create one for you.

To create the announcement block, go to 'Administer', then click on the 'Blocks' link. Towards the bottom of the page you will see a list of blocks that have already been created, even though many of them are disabled on the site. In fact, we will simply enable one of those instead of creating a new block. Find the block named 'Announcements: Summaries'. This block will provide links to announcements as well as showing a short introduction text for each one; something that would be nice to display on our site's home page. Click on the 'Region' drop-down menu for that block and change the setting from '<none>' to 'content'. This is telling Drupal that we want the block to show up in the main content of the page; other options would be to put it on the sides or in the footer. Next, click on the 'Save blocks' button to save the change. This will reload the page and show the block as being enabled in the Content section. Click on 'configure' for the block we just activated in order to configure the settings for the announcement block. The title for the block can be left blank. Under 'User specific visibility settings', select 'Users cannot control whether or not they see this block'. Under 'Page specific visibility settings', select 'Show on only the listed pages.', and then enter 'home' (without the quotes) in the 'Pages' text box. This will cause the announcement block to only appear on the home page. At this point, the home page should be displaying an empty announcements block as shown below.

Department of Content Management System Training

[View](#)[Edit](#)[Revisions](#)

The Department of Content Management System Training, "CMST" was founded in January of 2008. Our goal is to provide information and training in the use of Open Source CMS software, specifically Drupal. We have both an undergraduate and graduate program where students are given the opportunity to take part in cutting edge research while also learning from our diverse group of faculty members. Graduates from the department of CMST have gone on to create web sites for various universities, government agencies, and companies both small and large.

To learn more about our curriculum, visit our [Course List](#).

We have a distinguished group of faculty members who bring their expertise to the department of CMST. More information on our faculty can be found on our [Faculty List](#).

Announcements

There are currently no announcements.

Add an Announcement:

That's great, but let's add an announcement so that it shows up in the new block.

To add a new announcement to the site, click on 'Create Content', and then choose the 'Announcement' link. We will be creating this announcement using the text found in the file announcement.txt. For the title, enter 'OSU Open Source Lab Stars Drupal Training'. The remaining contents of that file should be copied and pasted into the body of the announcement. Announcements are set to have a publish and expiration date. For now, leave the publish date alone as it will default to today's date. You can modify the expiration date in order to have the announcement removed sooner, but for our purposes the default is fine for that as well. For 'URL path settings', enter 'announcements/osl_training'. Click on 'Submit' in order to submit the announcement to the approval queue. Once it gets approved, the announcement will show up on the home page with a brief summary and a link to read the full announcement.