Introduction to Drupal - Contents
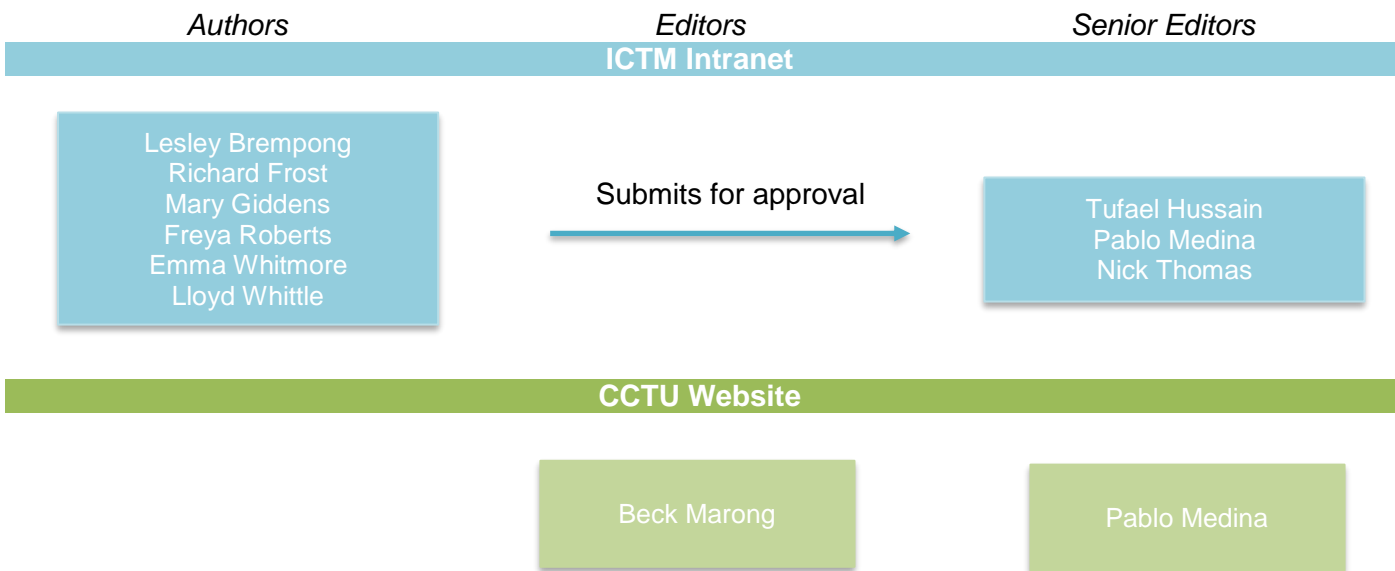
Introduction to Drupal

Drupal is content management software (CMS). It is used to make many of the websites and applications you use every day. Drupal has great standard features, like easy content authoring, reliable performance, and excellent security. Like Moodle, Drupal is an Open Source Project.

At the end of this session you will be able to create a page, edit a page, and work with files. You will also have a better understanding of writing for the web.

Requesting editing rights

There are four editing roles in Drupal:

- **Administrator:** mainly members of the Digital Presence team who have full access to all aspects of the CMS. Nobody in ICTM has this access level.
- **Senior Editor:** can create **and** publish content and edit all areas of the designated website and oversee the workflow, redirects as well as control certain design elements.
  For a Senior Editor to publish, they need to choose 'Publishing options' from the left-hand menu when in editing mode, then choose 'published' and then 'Save'.
- **Editor:** can edit **and** publish. Their work **may** be moderated by the Senior Editor, if they choose 'needs review', but if they choose 'published' there is no need to pass it by the Senior Editor.
  For an Editor to be able to publish, they need to choose 'Revision information' from the left-hand menu when in editing mode, then choose 'published' and 'Save'.
- **Author**: can edit but **cannot** publish. They will need to choose 'Needs review'. Their work will then be moderated by the Senior Editor and when ok, it will be published by the Senior Editor.

Authors	*Editors*	*Senior Editors*
ICTM Intranet		
Lesley Brempong
Richard Frost
Mary Giddens
Freya Roberts
Emma Whitmore
Lloyd Whittle	Submits for approval →	Tufael Hussain
Pablo Medina
Nick Thomas
| **CCTU Website**		
	Beck Marong	Pablo Medina

To request the right role:

1. Go to the website you are going to edit (see below)
2. Type /user at the end of the URL (=web address) in the browser
3. Click on the linked words 'log in'
4. You will be taken to the UCL Single Sign-on
5. Enter your UCL account credentials
6. Email web-support@ucl.ac.uk to let them know all of the following information:
   - What level of access you need to provide
   - The exact URL of the site that will be accessed e.g. https://www.ucl.ac.uk/drupal-support
   - The full name and user ID of the person that needs access to your site so UCL Web Support can verify their Drupal profile from their login attempt.
   - Make sure you CC the relevant Senior Editor.

Logging in

To access the CMS, you will need to log in to the system:

1. Scroll to the bottom of the page you want to edit

2. Click on the little grey cross next to 'Contact Us' in the UCL Footer
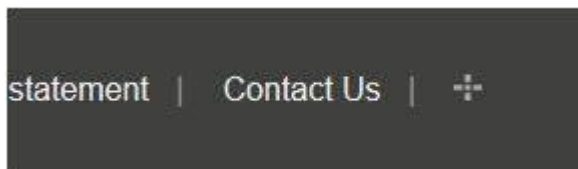
3. Put in your UCL credentials

4. Click on LOGIN

If you have successfully logged in, you should see a black toolbar at the top of your page:

where to the far right you can see the **Log out** next to your UCL userID:

Logging out

At the top of the page there is a link enabling you to Log out.

If you log out, you'll be able to browse around the site as a visitor would but you will need to click the login link again to be able to create content or perform any other administrative task.

If your CAS session is still active, you'll be redirected across to CAS and straight back to your site without being asked again for your username and password.

Content types in Drupal

There are several different content types in Drupal.

It is important that you distinguish between the different types and choose the right content layout for your content.

Type	Description
Landing page	A landing page is an important page from where users will 'jump' to more **specific**, **detailed** information. An example of a landing page is the homepage of a site, or the main research page. Users may have landed here as a result of a search or because they were given a specific link.
(Detail) page	A detail page is a page where the user is given more specific, detailed information. It is often the end-point of a user journey. The Drupal detail pages are: page, news, event, case study, programme page and IRIS profile.
Feed	A feed is list of articles or pages pulled automatically from a specified source.

We will go into more detail on content types in the next section.

Creating content

Overview

Content is the most important menu and this is where most of your content editing actions are carried out.

> IMPORTANT: Every time you use Explorer to work on Drupal, a kitten dies.

The top toolbar allows you to access the website's content:

1. If you click on the word **Content**, you will see all the pages of your site in a long list:

2. When in this view, you can create new content by clicking on the **+ add content** button:

3. You can also access your Files, Image Galleries and Slideshows in the same area - they are on the right-hand side of the page.

4. If, however, you **mouse over** the word **Content** in the top toolbar, you get a dropdown menu with the same choices.

   In this view you can access all content.

   Below is an example of the menu for 'Add content'.
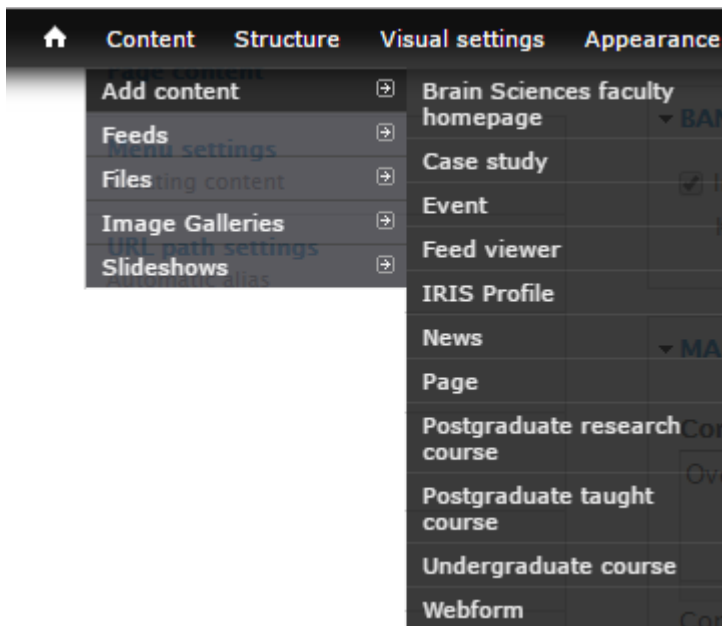
Tip: There is often more than one way to do the same thing in Drupal. Use the way you find easiest to remember.

Adding a file

Perhaps the second most common task will be to add or change a file.

There are several ways to add a file to a web page:
- Upload a new file to Drupal and insert it – using the page editor or the content manager.
- Find an existing file in the website's Library on Drupal and insert it.

Upload a new file to the Drupal Library and insert it from the page editor

1. Go to the page editor
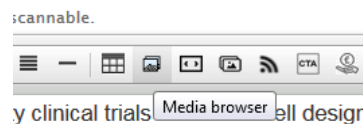
2. Click on the media browser icon

3. Click on Choose File - see image below - to find the file on your computer

4. Click on Upload
5. Click on Next
6. Leave the Options as 'default'
7. Click on Submit
8. The file is now available in the Library

Upload a new file or update a file in the Drupal Library using the Content manager

1. Go to the Files section of the Content manager
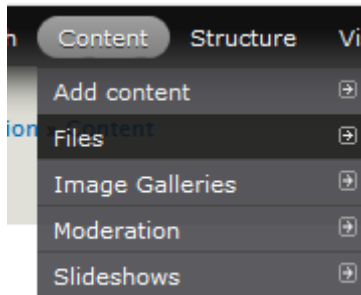
2. If you are adding a new file, click on Add file.
3. You can either drag and drop, or find the file in your computer by pressing add.
4. Once you've identified all of the files you need, press Next.
5. On the next page, you will be able to change the file name and a few more options, depending on the file type.
6. Press Save.
7. If you are simply changing an existing file (i.e. updating a spreadsheet that already exists, or uploading a revised version of a PDF), go back to step 1 and identify the file that you need to modify. You can use the filters or the search box for ease.
8. Click on Edit on the far right end of the line.
9. Upload the new version and press Save.

Find an existing file in the website's Library on Drupal and insert it

1. Go to the page where you want to add the file
2. Place your cursor where you want to show the file
3. Click on the add media icon
4. Click on the Library tab
5. Search for the file
6. Select the file
7. Click on Submit

    The file should now be visible on the page

Editing a page

The most common task you will have to undertake on Drupal will be making changes to an existing page. Drupal has a WYSIWYG interface, so it's dead easy.
1. Ensure you are logged in
2. Go to the page you want to edit
3. Make your changes
4. Depending on your role:
    - if you are a **Senior Editor**: click on 'Publishing options', choose 'published' from the drop-down menu
    - if you are an **Editor**: click on 'Revision information in the left-hand menu, choose 'published' from the drop-down menu
    - if you are an **Author**: click on 'Revision information in the left-hand menu, choose 'needs review from the drop-down menu
5. **Save** and **publish** or ask for it to be reviewed.

Creating a standard (detail) page

1. Ensure you are logged in
2. In the top toolbar, click on Content | Add content | Page
   - Remember the difference between a page and landing page!
3. Make sure you are familiar with the naming convention for the site
4. Provide a Title - this will appear at the top of the page and when added to the menu, in the navigation
5. Provide content for the intro/summary - this is useful for Search Engines as this will be the description of the URL when users find the page in question on Google and other search engines - it will stand out with a different background on the page and provides the user with an overview of what to expect on the page. An example sits above this page's title.
6. Provide the content of the page (sounds easy, right?)
   - Drupal provides a very powerful suite of editing tools, and it would be too much to go through all of them in this guide. You can find an explanation on each and every tool at https://www.ucl.ac.uk/drupal-support/editing-toolbar
7. If you have any partner logos or information that you want to appear separated by a line, add it to the content footer section.
8. Decide if you need a sidebar - this provides a bit a space on the right-hand side of the page for you to use - in Silva this was the index_right
   If you want one, tick the box below the content footer.
6. Depending on your role:
   - if you are a **Senior Editor**: click on 'Publishing options', choose 'published' from the drop-down menu
   - if you are an **Editor**: click on 'Revision information in the left-hand menu, choose 'published' from the drop-down menu
   - if you are an **Author**: click on 'Revision information in the left-hand menu, choose 'needs review from the drop-down menu
9. Scroll to the bottom of the page and **save**
10. **Check you're happy with the Revision date or change it**
11. Make sure you decide where it should live on the menu (more on this later). Failing to make it part of the menu means the page will **not** show in the navigation.

Creating a landing page
When creating this type of page the process is very similar to creating a detail page, but there are a few more things to take into account. You can choose from a range of content display options to create a wide range of landing pages.

Banner and hero image
- A landing page allows you to add a banner image as well as a hero image. We do not recommend using both on the same page.
- To add either a banner or hero image, just browse for the image and click on 'add'.

Flexible layout
You can choose to display teasers in either box or list format, in rows of two or three, in hybrid form (box teasers plus list) and with or without the below optional elements.

Feeds
The landing page is also used when you wish to display a feed page for all your news, events, case studies, research projects, publications or policies. If you wish to add a 'view all' feed page you will first need to request the feed from Digital Presence by emailing web-support@ucl.ac.uk with details (content type, org unit, subject etc.)

Optional elements - this includes Social Follows

Teaser styling

For teasers you can request one of two distinct styles. This is a sitewide setting. Link titles appear above or below the image as in these examples:

- Title above the image: www.ucl.ac.uk/students
- Title below the image: www.ucl.ac.uk/brain-sciences - this is the ICTM and CCTU setting.

- **Hero image:** choose if you are not using a banner image and you would like a large image at the top of the page.
- **Left menu:** choose it only when you do not have a horizontal navigation or for combined navigation below second level.
- **Right sidebar:** leave it on if you wish to use the optional social follows or display content that sits outside the natural content of the page. Remove it if you have chosen the teaser boxes in rows of three (this is mainly for aesthetic reasons as it it is likely to look very squashed on desktop).
- **Sidebar inheritance:** You can have your sidebar content inherit to all children pages if you add them to the menu and tick sidebar but leave the sidebox content blank.
- **Social follows:** leave these blank if you do not wish to display social follows in the right sidebar.

Visit our sample pages to see how the layouts differ:

- Boxes in 2 columns
- Boxes in 3 columns
- Teaser list page with hero image
- Hybrid (boxes plus list)

How to add a landing page

> Landing pages are very easy to change. If you wish to change the layout, you can do so by clicking 'edit page' and choosing a different layout option without losing any content.

1. From the content menu, click on Add content > Landing Page
2. Decide if you would like to use a banner. If you do, browse for a banner image and add this
3. Decide if you would like to use a hero image. Remember, having a banner as well as a hero image is 'overkill'.
4. Add a title
5. If you don't want left-hand navigation, take the tick out of the 'Left Nav' box under Layout
6. Choose your Layout: Boxes 2 columns, Boxes 3 columns, List or Hybrid - see table below for advice
7. If you want to use a Sidebar, tick the box 'Show sidebar'
8. Add some descriptive text in 'Content intro/summary'
9. Add some text in the Body if so required

Teaser type	When to use
boxes 2 columns	You should use this if you are using a Sidebar.
boxes 3 columns	You should use this if you don't want to use a Sidebar
list	You should use this if you have a long list of teasers
hybrid	This is combination of boxes and a list - the boxes come first

How to add teasers

Keep images the same size and aspect ratio for all teasers. Landscape images will work best.

1. Add a teaser title e.g. Project01
2. Add the relevant URL for Project01 - if internal, click on the Title URL button and search for the page. If external, paste the URL in the available space

3. Add some teaser text - make sure you have the same length of text for all teasers if you want it to look neat
4. Add an image - make sure the images are all the same size and landscape rather than portrait
5. Continue until you've done all the teasers

Menus

This section will help you understand how the main navigation works in Drupal and how to create and assign pages to a parent menu.

Menus for website visitors

Menus are important for **users** to enable them to navigate your content.

The new Indigo navigation style adopted for Drupal sites shows the user exactly where they are at any given moment, through the use of highlighting and colour. The current page (personal tutoring in the below example) is highlighted by a vertical line to the left in the site palette colour.

The parent section (Teaching resources) is shown as a block colour with white text and the sibling pages show as white against the grey of the rest of the menu.
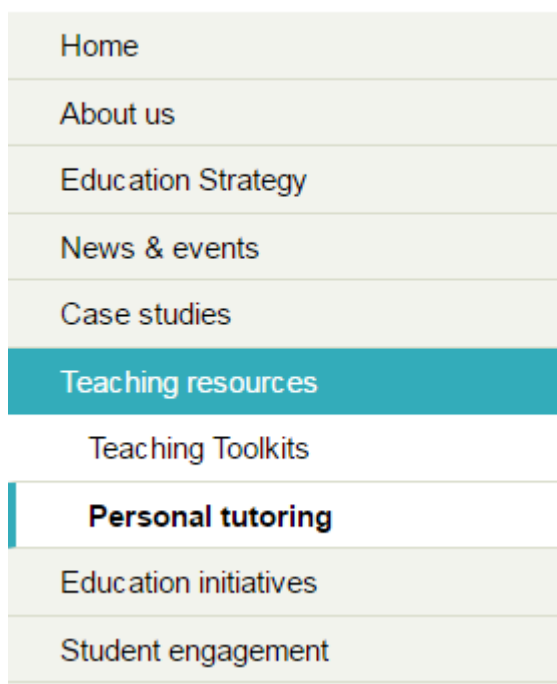
Menus for editors

Every time you create a page, not only do you need to publish it, but you also need to decide where the page will show on the menu.

In other words, is the page going to be a main, top-level page with or without 'child pages' hanging off it, or is it going to join an existing group of child pages? Once you've made the decision, you use the Menu settings in the left-hand toolbar to enable it to become part of the menu.
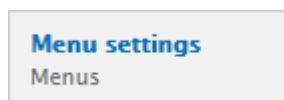
How to use menus

You need to be in editing mode and have clicked on Menu settings!

1. In Title* you can change the title which appears in the actual menu.
2. You need to tick the box next to 'Provide a menu link' for the title to appear in the menu.
3. You can provide a description of the item under 'Description'.
4. In the dropdown menu, you choose where the page is going to 'sit'.
5. Click on Save.

Title *

Menus

Content limited to 100 characters, remaining: **95**

Page content	☑ Provide a menu link
Menu settings Menus	**Menu link title** Menus
URL path settings Automatic alias	**Description**
Meta tags Using defaults	Shown when hovering over the menu link.
URL redirects No redirects	
Revision information New revision	**Parent item** -- General introduction ▼
Authoring information By ccaasvp on 2016-12-07 09:49:18 +0000	
Publishing options Published	

(Save)   (View changes)   (Delete)

Change the position of a page in the menu
It is very easy to change the position of pages, but **do read the warning** in the Sidebar!

1. Click on Structure | Menus | Main menu in the top toolbar to see all the pages of your site.
2. Click on the 4-headed cross and drag the page you want to move to the desired position.
3. When finished make sure you scroll to the bottom and **Save**

✛ Editing Toolbar

　✛ Cut and Paste

　　✛ Paste as plain text

　　✛ Paste from Word

　✛ Hyperlinks

　✛ Anchors

Change the title of a menu item, including the menu link
1. Make sure you are in editing mode.
2. Click on Menu settings in the left-hand toolbar.
3. Change the title in the top-left, under Title*.
4. Change name under the menu link title.
5. **Save**.

Workbench revisions and approvals
Workbench allows more control over content publishing. Rather than publishing immediately with one click, all roles - including those with the right to publish - can check their drafts before they publish.

When you are logged in, the first item in the top toolbar is called My Workbench: here is where you can easily access your own drafts or see a handy list of changes to approve from authors.

Creating and publishing new content
When you create a new page and click **save**, this creates a revision of the page. In order to publish you need first to select publish under publishing options.
Then you need to click **moderate.**
- Editors and senior editors can publish their own work so when they click moderate, they can choose to set to either 'needs review' or 'published'.
- Authors cannot publish their own changes. When they click moderate, they can only change the status to 'needs review'. They can access all their draft content in MyWorkbench > My Drafts
- Editors and Senior Editors can then see a list of pages or changes by authors that need review under My Workbench > Needs Review.

Making changes to existing content
This is exactly the same for making changes to existing content except that you may want to compare your changes to an earlier version. When you click moderate you will see a full list of revisions for that piece of content.
- You can set the new draft to live by selecting published from the status dropdown.
- You can roll back to an earlier version by clicking revert. This sets the earlier version live and creates a new revision.
- You can compare changes by selecting two revisions and clicking compare.

Deleting content and deleting revisions
You can delete a revision when you click moderate and click delete on an individual revision from the full list.
Do not click delete when you are editing a draft as this will delete the entire web page.

This cannot be undone 😱

More tips and important considerations

Responsibilities of Senior Editors
Senior Editors must:
- Ensure sensitive data are NEVER posted on any of your websites!
- Keep an up-to-date list of all Editors and inform web-support@ucl.ac.uk when Editors leave UCL.
- Organise regular meetings with all Editors / Authors to discuss if the website is still in line with the departmental / project strategy, if any changes required to the contents of the website, which content needs reviewing etc.
- Inform web-support@ucl.ac.uk of any changes of staff currently editing, including their own role.
- Teach Editors/Authors how to resize images.

- Show Editors/Authors where to upload videos on MediaCentral.
- Show Editors where to find UCL copyright-free images on UCL Imagestore.
- Show Editors/Authors where to find information about Writing for the Web on Lynda.com

Writing for the web

Writing for the web differs dramatically from writing for print publications. This is because people navigate websites in a unique way. They:

- are easily distracted
- tend to skip around web pages looking for items of interest
- avoid long chunks of text
- leave quickly if they don't get what they want

An increasing number of people now view websites on mobile devices. Typically, these devices restrict the amount of content that can be viewed in one go, which makes it even more important to keep content brief, simple and direct.

- Know your users, including how those with disabilities will interact with your text, e.g. using screen readers.
- Write in plain, direct and uncomplicated language.
- Structure your copy so that it easily scannable.
- Always get someone else to check and proofread your content before it goes live.

More support and guidance

You can find scores of How to Guides at https://www.ucl.ac.uk/isd/how-to-guides?collection=drupal-isd-howto&. Use the search field to narrow your results.

Working with images

At the moment, our websites are not extremely image-heavy, so I decided to not to include any guidance on images, as there would be a lot to cover. You can find very detailed guidance at https://www.ucl.ac.uk/drupal-support/images

Building great websites

UCL Web Support have put together some great guides on a number of topics, including SEO, using Google Analytics, Writing for the web, and Understanding your users. You can find out more at https://www.ucl.ac.uk/building-great-websites/

Help and support

For authors and editors your first port of call should be your Senior Editor. If they are unable to help or unavailable, you can always contact web-support@ucl.ac.uk

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