

Getting Started with Drupal

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ALA Annual Conference

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Slides available at: slideshare.net/vacekrae

30-Second Introductions

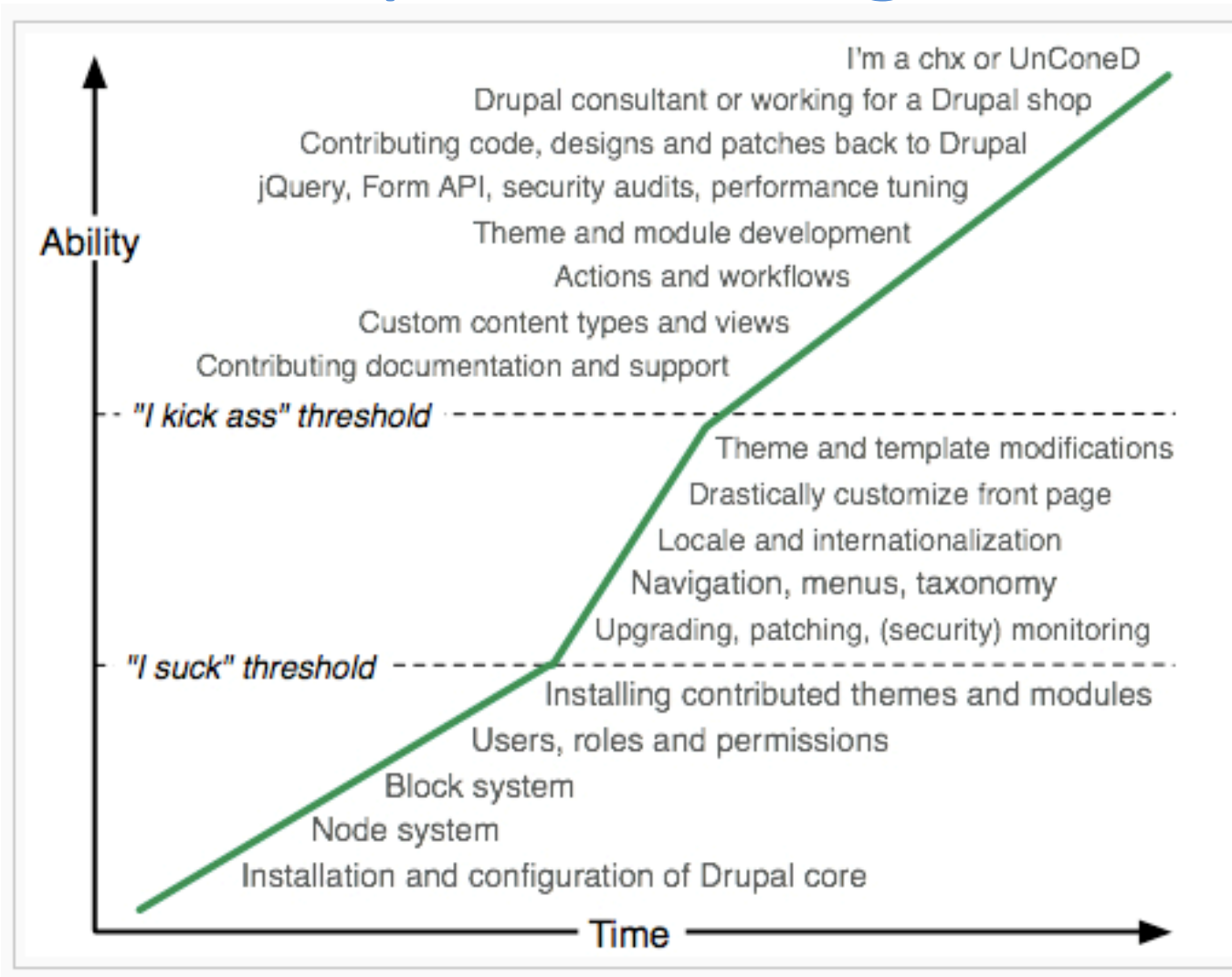
- Your name, title, affiliation
 - What's your role in library web development?
 - What web development tools are you currently using?
 - What do you want to do with Drupal at your library?
-

Our Objectives Today

- To become more conversant in Drupal speak
- To learn how to manage and maintain a basic Drupal site
- To learn about new themes and modules most often used by libraries
- To cross the “I suck” threshold...



Drupal Learning Curve



<http://buytaert.net/drupal-learning-curve>

Schedule

- Introduction & Content 9:00-10:30
 - Morning break 10:30-10:45
 - Users & Themes 10:45-12:00
 - Lunch 12:00-1:30
 - Modules 1:30-3:00
 - Afternoon break 3:00-3:15
 - Maintenance & Security 3:15-4:30
-

Drupal: What is it?

- An open source content management system (CMS)
- Created by Dries Buytaert
- Web standards-friendly
- Timeline/history
 - Dorp → Drop → Drupal
 - derived from the Dutch word "Druppel" which in English means "Drop"
 - Drupal was born in January 2001
- Version 7 released in January 2011



Drupal: Why Libraries Love It

- Easy to deploy a robust web site quickly and easily
 - Easy to include many elements of social networking
 - Makes customizing library tools for local specifications easy
 - ILS
 - Discover Layer/metasearch tools
 - LibGuides
-

Open Source: Good for Libraries

- Active community of users and developers
 - Develop modules that can be shared
 - Libraries are expected to do more and more online
 - Libraries without in-house programming support can quickly deploy robust sites
 - Libraries with programmers can create and contribute modules
 - Actively participating in open source communities can save everyone time, headaches, and effort
-

TONS of libraries are using Drupal



The screenshot shows the Groups.Drupal website interface. At the top is a blue header with the Groups.Drupal logo and navigation links: My account, Recent, Jobs, Groups, Events, and Log out. A search bar is located to the right of the navigation links. Below the header, the main content area is titled 'Drupal Libraries' and includes tabs for View, Edit, and Revisions. A message box states: 'You are viewing a wiki page. You are welcome to edit it. Be bold!'. Below this, it says 'Last updated by rvanderh1 on Thu, 2011-06-02 10:05'. The section is titled 'Libraries Using Drupal' and includes a note: 'Please add to this list. Your library is particularly welcome. If you do not see an edit tab, go to the wiki version of this page.' A list of library categories is shown: Public libraries, School libraries, University libraries, Special libraries, and Library services. Below this, a list of public libraries is provided: Adams County Public Library (OH), Arlington Heights Memorial Library, Altadena Library District, and Ann Arbor District Library. On the right side, there are three sidebar boxes: 'Libraries' with a 'Join' link, 'Group organizers' with links for 'highermath' and 'domesticat', and 'Group categories' with a 'Resources' section listing 'How-tos (16)', 'Modules (13)', 'Presentations (13)', 'Service providers (3)', 'Snippets (3)', and 'Themes (2)'. At the bottom of the sidebar, there is another 'Libraries' box with a search bar labeled 'Enter keywords:'.

Groups.Drupal

My account Recent Jobs Groups Events Log out

Search

Drupal Libraries

View Edit Revisions

You are viewing a wiki page. You are welcome to edit it. Be bold!

Last updated by [rvanderh1](#) on Thu, 2011-06-02 10:05

Libraries Using Drupal

Please add to this list. Your library is particularly welcome. If you do not see an edit tab, go to the [wiki version](#) of this page.

- [Public libraries](#)
- [School libraries](#)
- [University libraries](#)
- [Special libraries](#)
- [Library services](#)

Public libraries:

- [Adams County Public Library \(OH\)](#)
- [Arlington Heights Memorial Library](#)
- [Altadena Library District](#)
- [Ann Arbor District Library](#)

Libraries

- [Join](#)

Group organizers

Organizers for this group

- [highermath](#)
- [domesticat](#)

Group categories

Resources

- [How-tos](#) (16)
- [Modules](#) (13)
- [Presentations](#) (13)
- [Service providers](#) (3)
- [Snippets](#) (3)
- [Themes](#) (2)

Libraries

Enter keywords:

Search is automatically:

<http://groups.drupal.org/node/13473>

Acquia Drupal

- Drupal core bundled with commonly used modules that won't change over time
 - Drupal v6.17: 3.38MB
 - Drupal v7a5: 8.51MB → lots more included :)
- Convenience for preconference setting

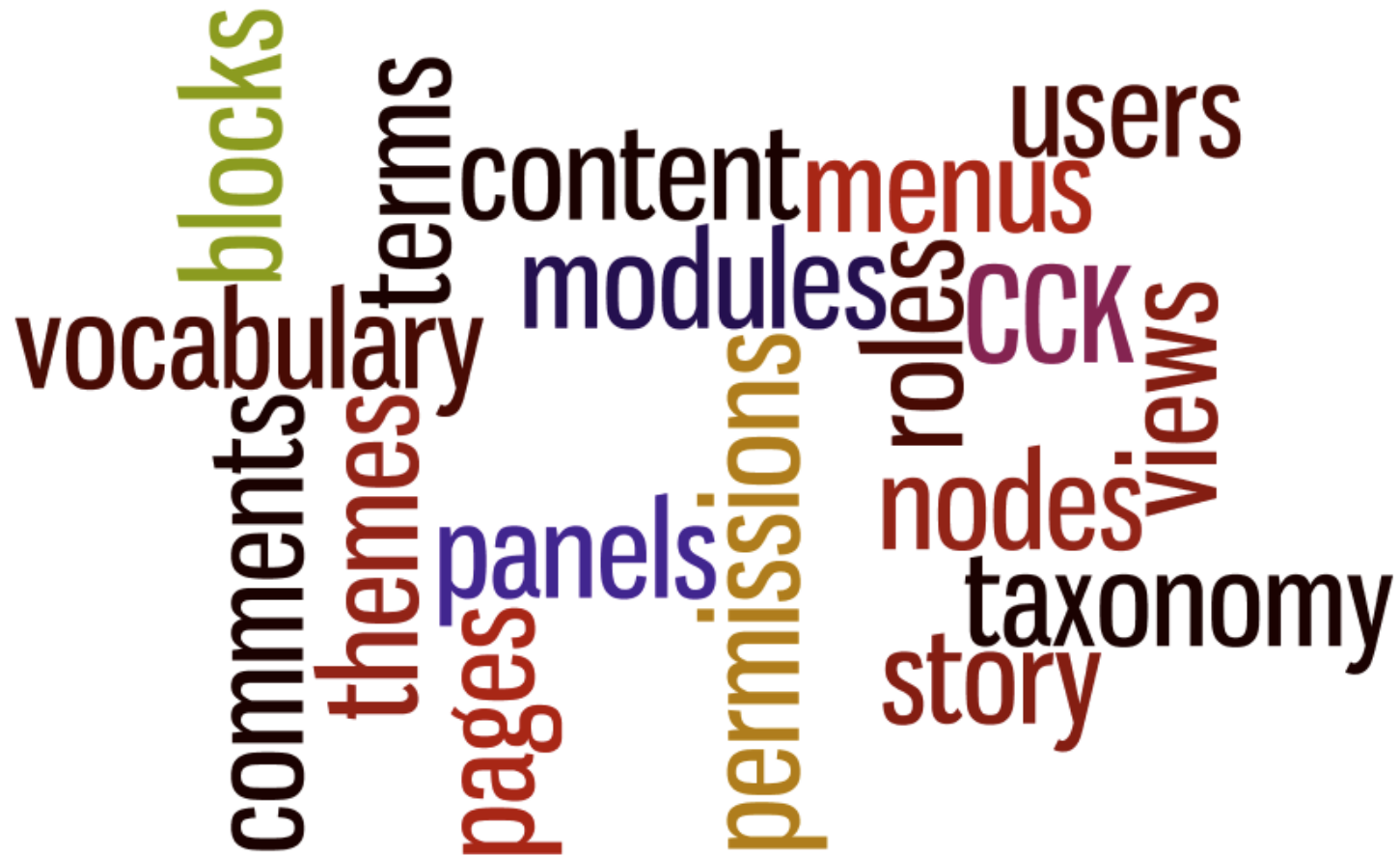


Drupal UX

- Steep learning curve → takes time to get across the “I suck” threshold
- More development flexibility than other open source CMSs like Wordpress or Joomla!
- Drupal 7 improves the CMS user experience over previous versions



Drupal Terminology



A word cloud of Drupal terminology. The words are arranged in a circular pattern, with some words appearing vertically and others horizontally. The colors of the words include green, brown, red, purple, blue, and yellow. The words are: blocks, content, users, menus, modules, CCK, roles, views, nodes, taxonomy, story, permissions, panels, pages, themes, vocabulary, comments, and terms.

blocks
content
users
menus
modules
CCK
roles
views
nodes
taxonomy
story
permissions
panels
pages
themes
vocabulary
comments
terms

Repeat after me...

The Drupal Glossary is my friend.

The Drupal Glossary is my friend.

The Drupal Glossary is my friend.

<http://drupal.org/glossary>

Example Sites

- Auraria Library
 - library.auraria.edu
 - Site for medium-sized academic library
 - Colorado Libraries
 - coloradolibrariesjournal.org
 - Online journal for state library association
 - University of Houston Libraries
 - info.lib.uh.edu
 - Site for medium-sized academic library
-

A Note About Presentation Format

- Each major area will consist of
 - Concepts
 - Just the basics about each topic
 - Examples
 - Examples from live Drupal 6 & 7 sites
 - Good, and, uh... “could-do-better”
 - Hands-On
 - Quick activities, time- and wireless-permitting
 - TDF Module
 - “To-Die-For” Module
 - Insanely helpful modules that you should know about
-

Your Site: A Tour

- Open a browser and point it to <http://localhost:8082>
 - We will:
 - Review Dashboard-Modules
 - Make some changes to the site configuration
 - Take a quick look at the Drupal file structure
-

Content: Concepts

- There are 2 default content types in Drupal 7
 - Article (time-sensitive information)
 - Basic page (static information)
 - Custom content types can be created
 - Content is added via online forms
 - Managing URLs
 - Specific paths can be set to content
-

Drupal Term: Node

- A node is a piece of content in Drupal, typically corresponding to a single page on the site
 - Every node also belongs to a particular content type, and can additionally be classified using the taxonomy system
 - Examples of nodes are polls, stories, book pages and images
-

Content: Concepts

- Content exists in “nodes”
 - Think of nodes as structured pieces of content on the site, such as
 - A database listing in a directory of databases
 - A post in a library’s news blog
 - The text of a library policy posted online
 - These different things, and anything you can think to create, are “content types”
-

Content: Concepts

- Options for your home page content
 - Static content
 - Create a page that displays desired content
 - Set as homepage: Configuration => Site Information
 - Dynamic
 - Use “promote to front page” box to display content on the home page
 - A combination
 - Use blocks to display both static and dynamic content
-

Content: Examples

- Custom content:
 - ADI/staff directory
 - *Colorado Libraries* article



Content: Examples

[Information Entry](#)

[s Blog](#)
[Blog](#)
[Behind the News Blog](#)
[and the News Blog](#)
[Communication Blog](#)
[munication Blog](#)

[urce](#)

ViewEditDevel

LexisNexis Academic

Title: *

Url:

Alternate Url:

Provider:

Description:

Content: Examples

Home » 8,000 Books Ethiopia Bound: The Colorado Connection

8,000 Books Ethiopia Bound: The Colorado Connection

View

Edit

Title: *

8,000 Books Ethiopia Bound: The Colorado Connection

Byline:

Janet Lee

Split summary at cursor

Body:

Each morning as I walked into town to begin my volunteer/sabbatical work at the Segenat Children and Youth Library in Mekelle, Ethiopia, I was comforted by the mountains that surrounded me and the clear blue skies overhead that reminded me of home. As a "semi-native" of Colorado, I relished the cool nights after the warm days that living at this altitude would bring. There were heavy rains during the rainy season, but just like in Colorado, the mud turned to dust as soon as the sun came out. Water is and will always be an issue. The prickly-pear cactus grew wild and was often used as a fence or a border, separating houses or fields of grain. It bore a delicious fruit known locally as "Belas" and was sold by street vendors at bus stops and street corners. At times the terrain, even in town, was difficult to navigate. It seemed that no matter which direction one was headed, it was always uphill. Imagine a horse pulling a cart filled with materials, the traditional method of transportation since there were few personal vehicles and few paved streets, attempting to navigate these rocky roads. On one trip to a nearby mountain village, I thought I was "off-roading" in the mountains of Colorado. Traversing the mountain via switchbacks and hairpin turns to be greeted by

Content: Hands-On

- Create an “About” page with lorem ipsum text
 - Click on Content → Add Content → basic page
 - Fill out the required fields
 - Look at additional options for changing the URL
 - Look at publishing options, and be sure your article is published and promoted to the front page
 - Click Save
-

Content: Hands-On

- Create a “Library News” article
 - Click on Content → Add Content → Article
 - Fill out the required fields
 - Look at additional options for changing the URL
 - Look at publishing options, and be sure your article is published and promoted to the front page
 - Click Save
-

Content: Hands-On

- Group discussion
 - What types of content do you want for your site?
 - How many content types are appropriate?
 - Click on Structure → Content types → Add content type
-

Creating content types

Name *

The human-readable name of this content type. This text will be displayed as part of the list on the *Add new content* page. It is recommended that this name begin with a capital letter and contain only letters, numbers, and spaces. This name must be unique.

Description

Describe this content type. The text will be displayed on the *Add new content* page.

Submission form settings

Title

Publishing options

Published , Promoted to front page

Display settings

Display author and date information.

Comment settings

Open, Threading , 50 comments per page

Menu settings

Title field label *

Preview before submitting

☐ Disabled

☒ Optional

☐ Required

Explanation or submission guidelines

This text will be displayed at the top of the page when creating or editing content of this type.

Too many content types!

Create content

- Audio

Audio files.

- Electronic Resource License

- Event

Events have a start date and an optional end date as well as a teaser and a body. They can be extended by other modules, too.

- Excel Data

Data files in Excel, tsv, or csv format

- External Links

- Fund Code

- ILS Files

These are files which the ILS Department is making available for folks to download (batch load files, etc)

- Image

An image (with thumbnail). This is ideal for publishing photographs or screenshots.

- Library Logos

- Page

A *page*, similar in form to a *story*, is a simple method for creating and displaying information that rarely changes, such as an "About us" section of a website. By default, a *page* entry does not allow visitor comments and is not featured on the site's initial home page.

- Panel

A panel a page layout broken up into rows and columns.

- PDF

PDF file that you want to be viewed

Regions, Blocks & Menus: Concepts

- Regions
 - Preset areas on your web pages into which you may add and arrange content (i.e., blocks)
 - Determined largely by the theme used
 - Menus
 - Provide site navigation, sub-navigation
 - They “live” in blocks
 - Blocks
 - Think of them as widgets
 - They are chunks of content outside of the main content area of your pages
 - Their visibility on pages can be controlled very precisely
-

Regions, Blocks & Menus: Examples

- To view regions in a theme
 - Structure → Blocks → Demonstrate block regions
- Two following slides
 - Regions in Bartik theme
 - Regions in Garland theme





Header

[Home](#)

[About](#)

Featured

[Home](#)

Sidebar first

Highlighted

Sidebar second

Bartik

Help

Content

Triptych first

Triptych middle

Triptych last

Footer first column

Footer second column

Footer third column

Footer fourth column

Footer

Exit block region demonstration

Header



acquia drupal

Getting Started with Drupal

Home

About

My account

Log out

Left sidebar

Home

Highlighted

Right sidebar

Garland

Help

Content

Footer

Regions, Blocks & Menus: Examples

[Home](#) > [Administer](#) > [Site building](#) >

Blocks

[List](#) [Add block](#)

Zen Based UH Libraries Rubik Zen

This page provides a drag-and-drop interface for assigning a block to a region, and for controlling the order of blocks within regions. To change the region or order of a block, grab a drag-and-drop handle under the *Block* column and drag the block to a new location in the list. (Grab a handle by clicking and holding the mouse while hovering over a handle icon.) Since not all themes implement the same regions, or display regions in the same way, blocks are positioned on a per-theme basis. Remember that your changes will not be saved until you click the *Save blocks* button at the bottom of the page.

Click the *configure* link next to each block to configure its specific title and visibility settings. Use the [add block page](#) to create a custom block.

[\[more help...\]](#)

Summon Search Box

Highlight (right box, used with summon)

left sidebar

Block	Region	Operations
navigation bar		
⛶ Superfish 1 (Superfish)	navigation bar	configure
Ticker/Messages bar		
⛶ Site Alert	Ticker/Messages bar	configure

right sidebar

Regions, Blocks & Menus: Examples


SearchServicesAboutHelp

UNIVERSITY of **HOUSTON** LIBRARIES


M.D. Anderson Library
Today's Hours 7:00am - 10:45pm

ViewEditOutlineRevisions

OneSearch
e-Journals
Databases
Catalog
Research Guides
Site Search



Search for articles, books and more.
[Advanced Search](#) | [OneSearch News](#)



Services »

- [Interlibrary Loan](#)
- [View & Renew](#)
- [Computers & Printing](#)
- [For Faculty & Graduate Students](#)
- [Course Reserves](#)
- [More...](#)

About »

- [Hours](#)
- [Campus Libraries & Collections](#)
- [Maps & Directions](#)
- [Staff Directory](#)
- [Employment](#)
- [News & Events](#)
- [More...](#)

Help »

- [Contact Us](#)
- [Ask a Librarian](#)
- [Live Chat](#)
- [Research Guides](#)
- [FAQs for Accessing Electronic Resources](#)
- [More...](#)

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[Website Feedback](#) | [Policies](#) | [Giving to the Libraries](#) | [Contact Us](#) | [Maps & Directions](#) | [Site Map](#) | [Mobile Site](#)
[UH Home](#) | [UH System](#) | [State of Texas](#) | [Emergency Site](#)

Regions, Blocks & Menus: Hands-On

- Relabel “About this Web Page” to “About”
 - Click on Structure → Menus → List Links corresponding to Main Menu
 - Click Edit corresponding to Home
 - Change “About this Web Page” to “About” in the Menu Link title field
 - Click Save
-

Regions, Blocks & Menus: Hands-On

- Reorder “About” and “Home”
 - Drag the + symbol thingy and drop it above the other one
 - Click Save Configuration
-

Regions, Blocks & Menus: Hands-On

- Create a secondary navigation menu
 - Click on configuration button thingy on the navigation menu → Links
 - Click on Add Link, and type “About” in the menu link title field
 - Type “about” in the path field
 - Click Save
-

Regions, Blocks & Menus: Hands-On

- Blocks
 - Move the search box to the upper right
 - Structure → Blocks; change dropdown from “sidebar first” to “header”
 - Remove
 - User login block
 - “Powered by Drupal” footer
 - Structure → Blocks; change dropdown from “footer” to “none”
-

Users, Roles & Permissions: Concepts

- “Users” are all people who will visit your site as well as all people who will create content for and help you manage your site
 - Users are placed into “roles” that allow them access to the parts of the site that they work on
 - “Permissions” are assigned to roles to control the actions that they can take on parts of the site
 - One of Drupal’s great strengths is flexibility and granularity regarding users
-

Users, Roles & Permissions: Concepts

- The user you created when you installed Drupal is “user 1,” the superuser, which is automatically in the “administrator” role
 - There are two additional default roles in Drupal 7:
 - anonymous user
 - authenticated user
 - Each user created after “1” is numbered sequentially with a uid number
-

Users, Roles & Permissions: Concepts

- To create a user, you need 3 pieces of info
 - Username
 - Password
 - Email address (verification highly recommended)
 - More options: include picture/signature
 - Useful? Maybe on an intranet site or a more social library site
 - **TDF Modules**
 - LDAP integration synchs user accounts with your network accounts
 - CAS allows for single sign-on into multiple systems
-

Users, Roles & Permissions: Concepts

- Options for user account creation
 - Unmoderated
 - Use with extreme caution!
 - Spammers WILL find you!
 - Moderated
 - Users can request accounts, but site admins have to approve requests
 - Note: This is the default setting in Drupal 7
 - Administrative approval required
 - Recommended
-

Users, Roles & Permissions: Concepts

- Internal user policies
 - Who should have access?
 - What should they have access to?
 - Consider on content-by-content basis
 - External user policies
 - Will you allow user-contributed content?
 - Will you allow users to create their own accounts?
 - Will you require user email account verification?
 - **YES.** You will. Or at least, you really, really should.
 - Who will manage user accounts and monitor user activity?
-

Users, Roles & Permission: Concepts

- Create roles conservatively and precisely
- Too many roles can complicate permissions management
- Always follow the “principle of least privilege”
 - Everyone should have access to exactly everything they need to do their jobs, and nothing more



Users, Roles & Permissions: Concepts

- The roles that you create will depend heavily on your environment
 - The more types of content that you have, the more roles you (should) have
 - Analogy:
 - Think of roles relative to job duties among various staff in libraries
 - Different staff have access to different resources
-

Users, Roles & **Permissions**: Concepts

- Permissions can be assigned very specifically to each roles
 - Permissions are assigned by checking boxes that link roles to actions (screen shot follows)
 - Each role may (or may not) be allowed to create, edit, and delete each kind of content
 - This can apply to ALL content, OR
 - The user's OWN content
-

Users, Roles & Permissions: Examples

- (Select) Roles at Auraria Library:
 - Web administrator
 - 2 users, web librarian and programmer
 - Responsible for environment, maintenance, content curation
 - Blogger
 - 15 users, mostly in reference/instruction, marketing
 - Add content about services, events, news
 - ADI Administrator (databases manager)
 - 1 user in technical/public services
 - Manage display of and access to electronic resources
-

Too Many Roles!

[Library Map](#)
[My Account](#)

Search this site :

AURARIA LIBRARY
Engage your mind. Enrich your future.

Tuesday, June 21, 2011
Hours: 7:30 am - 9:00 pm
[all library hours](#)

[Research Tools](#)
[Research Guides](#)
[Library Services](#)
[Library Info](#)
[Ask a Librarian](#)

Add New Content

- [List My Content](#)
- [Add New Page](#)
- [Add a Library Alert](#)
- [Add Library Hours Information](#)
- [Add Staff Directory Entry](#)
- [Log Out](#)

Blogger Tools

- [Post to Library News Blog](#)
- [View Library News Blog](#)
- [Post to Research Behind the News Blog](#)
- [View Research Behind the News Blog](#)
- [Post to Scholarly Communication Blog](#)
- [View Scholarly Communication Blog](#)
- [Log Out](#)

Manage ADI

- [Add Database Resource](#)
- [Add Resource Alert](#)
- [Edit Taxonomy](#)
- [Manage ADI Terms](#)
- [ADI Search History](#)
- [Log Out](#)

Permissions

Permissions let you control what users can do on your site. Each user role (defined on the [user roles page](#)) has its own set of permissions. For example, you could give users classified as "Administrators" permission to "administer nodes" but deny this power to ordinary, "authenticated" users. You can use permissions to reveal new features to privileged users (those with subscriptions, for example). Permissions also allow trusted users to share the administrative burden of running a busy site.

Permission	anonymous user	authenticated user	adi administrator	blogger	content editor	library alerts editor	new materials administrator	personal content editor	protected page admin	resource alerts editor	staff directory administrator	theme administrator	website administrator
admin_menu module													
access administration menu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
display drupal links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
block module													
administer blocks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
use PHP for block visibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
blog module													
create blog entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
delete any blog entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
delete own blog entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
edit any blog entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
edit own blog entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
comment module													
access comments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
administer comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
post comments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
post comments without approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
contact module													
access site-wide contact form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Users, Roles & Permissions: Examples

- Roles for *Colorado Libraries*:
 - Web administrator (2 users)
 - Editor (3 users)
 - Guest Editor (1 new user per quarterly issue)
 - Column Editor (~10 users)
 - Book Review Editor (2 users)
 - Author (? users; haven't given authors access yet)
-

This is better.

[About](#) [Why Open Access?](#) [Contact](#)

Colorado Libraries

published by the Colorado Association of Libraries

Issue 35.1 Issue 35.2 Issue 35.3

FOR EDITORS

- Author Guidelines
- Guest Editor Guidelines

FOR GUEST EDITORS

- Add Guest Editor Introduction
- Add an Article
- Guest Editor Guidelines

[Home » Administer » User management](#)

Permissions

Permissions let you control what users can do on your site. Each user role (defined on the [user roles page](#)) has its own set of permissions. For example, you could give users classified as "Administrators" permission to "administer nodes" but deny this power to ordinary, "authenticated" users. You can use permissions to reveal new features to privileged users (those with subscriptions, for example). Permissions also allow trusted users to share the administrative burden of running a busy site.

PERMISSION	ANONYMOUS USER	AUTHENTICATED USER	AUTHOR	BOOK REVIEW EDITOR	COLUMN EDITOR	EDITOR	GUEST EDITOR	WEB ADMIN
admin_menu module								
access administration menu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
display drupal links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
block module								
administer blocks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
use PHP for block visibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
blog module								
create blog entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
delete any blog entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
delete own blog entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Users, Roles & Permissions: Hands-On

- Create a new user:
 - Click on “People” in the admin menu
 - Click on “Add user”
 - Enter a user name, email address, and password
 - Click “Notify user of new account”*
 - Click “Create new user account”

*it really will send email

Users, Roles & Permissions: Hands-On

- Create a new role
 - Click “People”
 - Click on the “Permissions” tab (upper right)
 - Click on the “Roles” button (upper right)
 - Type a new role name in the open box and click “add role”
 - Stay on this screen for the next step...
-

Users, Roles & Permissions: Hands-On

- Give the new role permissions to create articles
 - Click “edit permissions” link associated with the new “editor” role (lower right)
 - Give your editor role permission to create, edit, and delete all article content on your site by checking the appropriate boxes
 - Scroll to the bottom and click “Save permissions”
-

Users, Roles & Permissions: Hands-On

- Assign the new role to your new user
 - Click “People”
 - Click the “edit” link associated with your new user
 - Check the “editor” box under “Roles”
 - Click “Save”
-

Users, Roles & Permissions: Hands-On

- Set your site to require administrator verification for new user accounts
 - Click “Configuration” in the admin menu
 - Click “Account Settings” (top left)
 - Under “Registration and Cancellation,” select “Administrators only”
 - Click “Save configuration”
-

Lunch



More info about Views...

- Tutorial: Intro to Views (multiple parts)
 - <http://lin-clark.com/blog/intro-drupal-7-intro-views-pt-1>
 - Tutorial: Intro to Views (multiple parts)
 - <http://www.youtube.com/watch?v=1z13ylwMhk4>
 - Drupalove: 100 Drupal Views Tutorials
 - <http://www.drupalove.com/article/100-drupal-views-tutorials-and-resources>
 - Robert Townsend, *Foundation Drupal 7*
 - Appendix D: Views Recipes
-

Themes: Concepts

- Themes control the look and feel of your web site
 - PHP templates with HTML and CSS
 - There are currently ~800 contributed themes for Drupal sites
 - Drupal 7 comes with four standard themes:
 - Bartik: named for Jean Bartik
 - Seven: administrative theme
 - Garland: an old Drupal standard
 - Stark: used primarily as demonstration
-

Themes: Concepts

Build first. Then theme.

-Stephanie Pakrul



Themes: Concepts

- Four kinds of themes:
 - Default (Bartik, Seven, Garland)
 - Starter (Zen, Fusion)
 - Contributed (8 gazillion)
 - Custom (requires advanced HTML + CSS skills)
-

Themes: Concepts

- Default and contributed themes:
 - Modify colors
 - Change fonts
 - Add images
 - Check configuration options for different layout possibilities, i.e., column arrangements



Themes: Concepts

- Starter and custom themes:
 - Starter themes give a basic layout that can be heavily modified
 - Custom themes, which are beyond the scope of this workshop, can be created using HTML and CSS with a PHP template
-

Themes: Hands-On

- Switch default theme from Bartik to Garland and back:
 - [Groups.drupal.org/node/19730](https://groups.drupal.org/node/19730)
 - Click “Appearance”
 - Click “Set default” next to Garland
 - Click “Save configuration”
 - Click Home icon to view theme changes
 - Repeat process to set back to Bartik
-

Themes: Hands-On

- Explore contributed themes:
 - <http://drupal.org/project/Themes>
 - Search by:
 - Drupal version
 - By project status
 - Keyword
 - Most installed, date released, etc.
 - Check for: commits, maintainer, community activity around a theme
-

Themes: Hands-On

- How to install contributed themes:
 - Click “Appearance”
 - Click “Install new theme”
 - Two options:
 - Install from URL
 - Upload a module
-

Cool Things to do with Themes

- Subthemes:
 - Apply to different regions of your site, i.e., blogs, audience-specific sites
 - Keeps the same overall look and feel
 - Administrative themes:
 - Assign a different theme for users with different permissions so that they know when they're using administrative parts of site
-

Modules: Concepts

- Modules add functionality to your cms, extending the flexibility, making it more powerful
 - Warning: DO NOT HACK CORE!
 - Upgrades will be hell → We mean it!
 - 3 kinds of modules
 - Core, which come with your installation of Drupal
 - Contributed, which you find, download and install
 - Custom, which you build yourself (and then hopefully share with the Drupal community)
-



**Every time you hack core
God kills a kitten**

Please, think of the kittens!

Not everything comes in core

- You'll still need to add some essential modules
 - Why?
 - As Drupal evolves, you want your CMS to remain flexible.
 - If modules that have functionality that will evolve constantly, it's better to not lock them down by including them in core.
 - If modules provide a UI, then it's better to not be in core, providing more flexibility.
-

Contributed Modules: Concepts

- Modules that other people have created
- Some may have more functionality than what you are looking for, and some less
- Look at Modules handout!



Essential Contributed Modules

- **Views** provide a flexible method for Drupal site designers to control how lists and tables of content are presented. This tool is essentially a smart query builder that, given enough information, can build the proper query, execute it, and display the results. It's very powerful and one of the most used modules on this entire list.
-

Essential Contributed Modules

- **Organic Groups** enable users to create and manage their own 'groups'. Each group can have subscribers, and maintains a group home page where subscribers communicate amongst themselves.



Essential Contributed Modules

- **Pathauto** automatically generates human-friendly URL path aliases for content nodes.
 - **Google Analytics** offers more options and is cleaner than just pasting google analytics code in your site.
-

Essential Contributed Modules

- **Mollom** is an "intelligent" content moderation web service. By monitoring content activity on all sites in the Mollom network, Mollom is in a unique position to determine if a post is potentially spam; not only based on the posted content, but also on the past activity and reputation of the poster.
 - Also provides CAPTCHAs
-

Core Modules: Hands-on

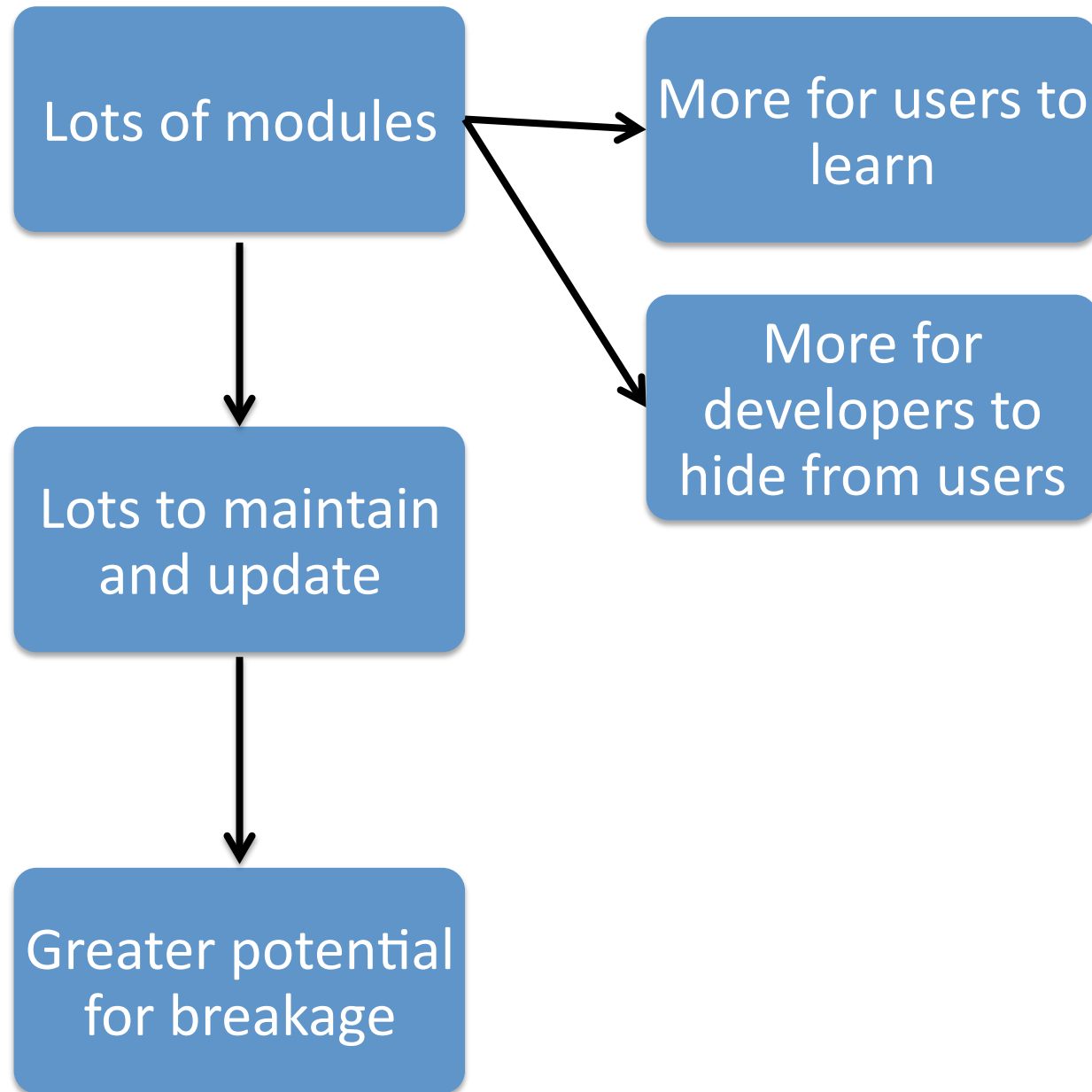
- Click Modules → Look at the list!
 - What are your observations about what is currently installed?
 - What modules would you use, and why?
 - Go to <http://drupal.org/project/modules>
 - If you have the ability to download, find one of the modules we talked about and download, install, and customize it.
 - If you can't download, activate one of the modules and customize it.
-

Drupal Break



Tips for Picking Modules

- Similar to what we've already discussed about themes:
 - How many sites use them?
 - Check versions
 - Check maintenance info
 - Last commits
 - Bug reports
 - Community Activity
-



Keeping it simple

An investment in CMS simplification and respect for the user experience can yield an extremely powerful system run by satisfied, happy users.

Custom Modules: Examples

- Custom modules
 - Beyond the scope of what we'll cover today
 - You need a programmer
 - Examples at the University of Houston Libraries
 - Staff Directory System
 - Electronic Database System
 - Hours with RESTful API
-

Maintenance & Security

- Maintenance
 - Backing up your site
 - Keeping your site up-to-date
 - Security
 - Keep your site safe from spammers and other baddies
 - Use the correct file permissions settings to prevent manipulation via the web server (Apache)
-

Maintenance: Concepts

- Backups are an important part of your maintenance and security routine
 - What needs to be backed up?
 - The MySQL database (most content)
 - The site file structure, especially the “files” directory (uploaded images and files)
 - Backup routines can be automated (cron) to save time and circumvent forgetfulness
-

Maintenance: Concepts

- When you opt to use a robust CMS such as Drupal, you are committing to a maintenance regime
 - A site that is not maintained becomes a security risk not only to itself, but to the environment hosting it
 - A site that is not maintained will eventually become obsolete and /or broken beyond repair
-

Maintenance: Concepts

- Modules and themes need to be updated
 - View available updates: Reports → Available updates
 - Your “Available updates” page should look like a healthy lawn, not look like a Christmas tree
 - Your overall version of Drupal core needs to be updated as well
 - Requires (hopefully a small amount of) down time
-

Maintenance: Concepts

- Your underlying web environment (OS, Apache, PHP, and MySQL) need to remain up-to-date as well
 - Create a regular backup and maintenance schedule
 - Regular updates of both the web server and Drupal components keep the update process shorter and simpler and minimize down time
-

Maintenance: Examples

- Auraria Library site backup
 - Automated MySQL database backed up nightly by UC Denver campus IT
 - Weekly backup to shared drive by web staff
 - Weekly backup is sufficient because most commonly changed content is in LibGuides
 - Personal site backup demo (time-permitting):
 - Every Friday morning (reminder in Outlook)
 - Back up database with Sequel Pro
 - Back up files with Fetch
-

Maintenance: Examples

- Open Acquia Dev Desktop Control Panel → Manage my Database → Export



Php myAdmin

The screenshot shows the phpMyAdmin web interface. On the left sidebar, there is a list of databases: **acquia_drupal** (75), **information_schema** (28), and **mysql** (23). Below this list is the text "Please select a database".

The main content area is titled "View dump (schema) of databases". It is divided into two main sections: "Export" and "Options".

Export Section:

- Buttons: [Select All](#) / [Unselect All](#)
- Database list: **acquia_drupal**, **information_schema**, **mysql**
- Export format options (radio buttons):
 - ☐ CodeGen
 - ☐ CSV
 - ☐ CSV for MS Excel
 - ☐ Microsoft Word 2000
 - ☐ LaTeX
 - ☐ MediaWiki Table
 - ☐ Open Document Spreadsheet
 - ☐ Open Document Text
 - ☐ PDF
 - ☐ PHP array
 - ☒ **SQL**
 - ☐ Texy! text
 - ☐ Excel 97-2003 XLS Workbook
 - ☐ Excel 2007 XLSX Workbook
 - ☐ YAML

Options Section:

- Header: Add custom comment into header (\n splits lines) [Text input field]
- ☒ **Comments**
- ☐ Enclose export in a transaction
- ☐ Disable foreign key checks
- SQL compatibility mode: **NONE** [Dropdown menu]
- Database export options** [Section header]
 - ☐ Add DROP DATABASE
- ☒ **Structure** [Section header]
 - ☐ Add DROP TABLE / VIEW / PROCEDURE / FUNCTION / EVENT
 - ☒ **Add IF NOT EXISTS**
 - ☒ **Add AUTO_INCREMENT value**
 - ☒ **Enclose table and field names with backquotes**
 - ☐ Add CREATE PROCEDURE / FUNCTION / EVENT
 - Add into comments** [Section header]
 - ☐ Creation/Update/Check dates
- ☒ **Data** [Section header]
 - ☒ **Complete inserts**
 - ☒ **Extended inserts**
 - Maximal length of created query: **50000** [Text input field]
 - ☐ Use delayed inserts
 - ☐ Use ignore inserts
 - ☒ **Use hexadecimal for BLOB**
 - Export type: **INSERT** [Dropdown menu]

Maintenance: Examples

- An out-of-date site
- An up-to-date site



: _ (

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Colorado Libraries

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Issue 35.1 Issue 35.2 Issue 35.3

FOR EDITORS

- Author Guidelines
- Guest Editor Guidelines

FOR GUEST EDITORS

- Add Guest Editor Introduction
- Add an Article
- Guest Editor Guidelines

Home » Administer » Reports

Available updates

List Settings Upgrade status

Here you can find information about available updates for your installed modules and themes. Note that each module or theme is part of a "project", which may or may not have the same name, and might include multiple modules or themes within it.

To extend the functionality or to change the look of your site, a number of contributed modules and themes are available.

Last checked: 1 sec ago (Check manually)

Drupal core

Drupal core 6.19		Security update required! ❗	
Recommended version:	6.22 (2011-May-25)	Download	Release notes
Security update:	6.21 (2011-May-25)	Download	Release notes
Includes: Block, Blog, Color, Comment, Contact, Database logging, Filter, Help, Menu, Node, PHP filter, Path, Search, System, Taxonomy, Update status, Upload, User			

Modules

Administration menu 6.x-1.5

Update available ⚠

Recommended version:	6.x-1.8 (2011-Jun-16)	Download	Release notes
Also available:	6.x-3.0-alpha4 (2010-Mar-10)	Download	Release notes
Includes: Administration menu			

Content Construction Kit (CCK) 6.x-2.9

Up to date ✓

Also available:	6.x-3.0-alpha3 (2011-Mar-17)	Download	Release notes
Includes: Content, Content Copy, Content Permissions, Fieldgroup, Node Reference, Number, Option Widgets, Text, User Reference			



[Home](#) » [Administration](#) » [Reports](#)

[+ Install new module or theme](#)

Last checked: 0 sec ago [\(Check manually\)](#)

Available updates

[LIST](#)[UPDATE](#)[SETTINGS](#)

Drupal core 7.2

Up to date ✓

Includes: *Block, Blog, Book, Color, Comment, Database logging, Field, Field SQL storage, Field UI, File, Filter, Garland, Help, Image, List, Locale, Menu, Node, Number, Options, Overlay, Path, Search, Statistics, Syslog, System, Taxonomy, Text, Toolbar, Update manager, User*

Modules

Advanced help 7.x-1.0-beta1

Up to date ✓

Includes: *Advanced help*

Chaos tool suite 7.x-1.x-dev (2011-May-16)

Update available ⚠

Recommended version: 7.x-1.0-beta1 (2011-May-31)

[Download](#)
[Release notes](#)

Development version: 7.x-1.x-dev (2011-Jun-08)

[Download](#)
[Release notes](#)

Includes: *Chaos tools, Views content panes*

Maintenance: Hands-On

- Reports → Available updates
 - All elements of your site-core code base, themes, and modules-are color coded:
 - Green: up-to-date
 - Yellow: update available, but not critical
 - Red: update required to ensure site security
 - Gray: no update available
-

Maintenance: Hands-On

- Check for, and update themes and modules
 - Click “Modules” (or “Reports”)
 - If there are updates available, check the box, and click “Update”
 - Click “Download these updates”
-

Maintenance: Hands-On

- Updates to Drupal Core require downtime
- Clone your environment and test before upgrading to a live site
- The more complicated your site, the more complicated the upgrade process
- Any customizations should be checked



Security: Concepts

- Control undesirable user behavior
- Understand the basics of site security
- The bottom line: Spammers and bad guys WILL find you!



Security: Concepts

- Controlling user behavior
 - User settings:
 - As mentioned earlier, require user account creation by admins
 - Or, at the very least, require email verification
 - Comment settings:
 - Always set comments for “moderated”
 - IP blocking: somewhat limited in use
 - **TDF Module:** Mollom
-

Security: Concepts

- Ensure that file permissions settings are secure and not writable by the server
 - Untrusted users are prevented from inputting dangerous code
 - Errors are written to the logs, not the screen
 - Unsafe file extensions are not allowed
 - **TDF Module:** Security Review
-

Administration Tips

- Create role-specific menus (CL example)
 - Hide admin menu from all but admins
 - View the site as internal and external user
 - Log out and test to see site as external user
 - **TDF Module:** Devel module allows you to view site as internal user
-

Final thoughts

- Do research on modules FIRST
- Pay attention to your peers
- Follow the “use only what you need” philosophy
- Find balance between usability and functionality
- Don’t give users too many options



Final thoughts

- “Remove” the extraneous stuff
 - Create templates for multiple page layouts
 - Create roles for basic users as well as advanced users
 - Documentation
 - How certain tools work
 - Reasoning for choices
 - Create and embed self-help within CMS
 - Conduct usability testing on the CMS
-

CMS Pain Assessment Tool

Choose the face that best represents how your CMS makes you feel



Hearts!
Rainbows!
Puppies!



Meh, it could
be worse.



Is it happy
hour yet?



What did I do
to deserve this?



CMS stands
for Cruel,
Maleficent,
Sadist.



THIS IS WHY WE
CAN'T HAVE
NICE THINGS.

http://www.isitedesign.com/insight-blog/10_11/cms-pain-assessment

Further Resources: Books

- Foundation Drupal 7, by Robert J. Townsend
 - Cracking Drupal: A Drop in the Bucket, by Greg Knaddison
 - The Definitive Guide to Drupal 7, tons of authors, published by Apress
 - Beginning Drupal 7, by Todd Tomlinson
-

Futher Resources: Tutorials

- Lynda, <http://www.lynda.com/>
 - Some free tutorials, full access requires subscription
 - Drupal offerings
 - 7 Essential Training
 - Lullabot, <http://www.lullabot.com/>
 - Drupal Easy, <http://drupaleasy.com/>, Free podcasts on Drupal
-

Further Resources: This Conference

- Drupal IG meeting:
 - Saturday, 1:30-3:30
 - Convention center room 242
 - Four presentations about uses of Drupal in libraries
 - Level: beginner-advanced
 - Drupal Fail Panel and Group Therapy
 - Monday, 1:30-3:30
 - Convention center room 274
 - A panel of four discussing Drupal failures
 - Level: intermediate-advanced
-

Further Resources: Drupal Communities



- ALA LITA Drupal Interest Group
 - <http://connect.ala.org/node/71787>
 - Meetings and programming at Midwinter and Annual
 - drupal4lib email list (n00bs welcome!)
 - Coming soon! Online training
- Drupal.org
 - Create a user account
 - If you're a programmer, contribute!

Further Resources: Drupal Communities

- Drupalib
 - <http://drupalib.interoperating.info/>
 - a place for library Drupallers to hang out that lists library specific modules
 - Drupalcons
 - Conferences for Drupallers, different cities every year
 - Drupal Meetup Groups
 - <http://drupal.meetup.com/>
-



LITA Happy Hour



5:30-8:00 TONIGHT!

Howlin' Wolf Den

907 Peters Street

LITA Eats

Departs 7:00 from Happy Hour

Contact Info

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