Drupal User Guide
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I. Introduction

Different Features:

II. Creating a Basic Page

Definition: a page that you do not normally update and is usually linked to a menu. It is best practice to use a Basic Page for creating the main pages of the website (About Us, Our Services and similar) – all of the pages that are linked to the menu on the BE-BI webpages.

Steps:

1. Go to: Content → Add content → Basic page
2. A window like the one below will appear

3. Add a title to the page and select the language in which the body is written. Add some content in the body section.

4. Choose whether to add a menu link. If yes, more fields will appear.
   - Menu link title: You can give the menu link a different title than the menu page.
   - Parent item: Select <Main menu> as the parent item.
   - Weight: The weight influences how far right or left the link will appear. The BI homepage is set to a weight of 0 which makes it the landing page. A weight >0 puts the link to the right. The bigger the number the further to the right the link will be. A weight <0 puts the link on the left. For example, the BE home link has a weight of -1.

5. Once the page has been created, you can provide a translation.

Note: To add a hyperlink, select a word/sentence or an image and click on the hyperlink icon. You can then type in or copy/paste the URL link. Next go to the ‘Target’ tab and select the target – New Window and Same Window are the most used.
To add a translation:

If your website isn’t already multilingual, please skip to section first.

1. Click on the translate tab

2. A window like the one below will appear

3. Click on add to translate the page into French

4. A page similar to the basic page will appear. You can then edit all of the fields — title, body and menu link title and write them all in the other language — in this case French
   - In the menu settings click menu link enabled only for the French language if the menu links for French and English are different

5. Keep the same settings as for the English page.

6. If you ever need to edit anything, click on the translate tab and you can edit both the English and French versions

Note, if you want to find a page that doesn’t have a menu link — or even one that does - click on content in your dashboard for a list of all of the content on your website
From here, you can click on the content you want to see or edit.

III. Creating an Article

Definition: used for content that is updated often. On the BE-BI website, all of the section pages and the instrument pages are article content types.

The process of creating an article content type is very similar to creating a basic page. The main difference is that an article also has the added feature of allowing the admin user to add an image and tags.

Steps:
1. Go to: Content → Add content → Article
2. Use the same settings as for a basic page. Note: articles do not usually have a menu link
3. You can add translations similarly to a basic page
4. To find your article go to content and a list with all of your content will appear

IV. Creating a Content Type

At some point you might want to create your own content type, to be able to have more specific fields. For example, the content type images was added to be able to upload images to be included in the slideshows and tags (term references) were also added to customise what content appears in the different slideshows.

Steps:
1. Go to: Structure → Content types → add content type
2. Give your content type a name and possible a description
3. In publishing options: select
   - Default options: published, unselect promoted to front page
- Multilingual support: enabled with field translation and select hide translation links in the field that will appear

4. In display settings:
   - Untick display author and date information

5. In comment settings:
   - Default comment setting for new content: hidden

6. Other features are available, but those are the main changes to be done.

7. Click on save and add field

8. An error (shown below) will appear, prompting you to rebuild permissions. Do this now. This process might take a couple of minutes

   ![The content access permissions need to be rebuilt. Rebuild permissions.]

9. Once this is done go to structure → content types to finish editing your new content type.

10. A list of all of the different content types will appear (shown below), click on edit

![Content types]

11. Go to the ‘manage fields’ tab. From here you can add new fields for your new content tab. For example:
   - Tags: field type = term reference. Widget: choose from autocomplete, checkboxes or select list. Once you’ve made those changes, you will be prompted with a vocabulary to choose from, select the correct one (machines, sections, tags – more explanation about tags will be given later). Follow through the follow instructions before saving the settings.
   - Image: field type = image. You will be prompted to follow-up
12. You can then create content of your new content type.

V. Installing a Module

Definition: a module is a collection of files that contain some functionality (ex: translation)

Note: Before downloading any new module, it is always best practice to do a backup in case things go wrong. To do a backup of the BI test page, go to the main page and add /_site at the end of the URL (ex: https://test-be-bi.web.cern.ch/_site/)

You will be redirected to a page like the one below:

From here click on backup and restore.

Enter a tag for your backup – it can just be the name of the module you’re about to install, so that if things do go wrong, you can restore the version of your website before the installation of your module.

Once you’re done, go back to the original URL (ex: https://test-be-bi.web.cern.ch/en) and proceed with installing a new module, please follow the steps below.

Steps:

1. Go to the Drupal website (https://www.drupal.org/) and download the zipped file
2. Go to: Module → Install new module
3. A new window like the one below will appear. Click on browse and import the zipped file that you downloaded at the start.

4. You will now need to enable the module. Go to Module. A window like the one below will appear.

5. Using the search function or the menu on the left find the module that you have recently uploaded and enable it to be able to use its functions.

Note: Some modules require other modules, so you might need to download them and/or enable them in order to use your module. The Drupal documentation will tell you which modules you will require. Additionally, in the Module page, under each module, you can find more information about each modules requirements and also what other modules need the module to work.
VI. Creating a Block

Definition: blocks are the boxes of content (ex: search, useful links) that can be displayed in regions (ex: sidebar, footer, etc.) on your page.

Steps:

1. Go to: Structure → Blocks

2. You will be redirected to this blocks window. A useful feature of this window is ‘Demonstrate block regions (CERN)’. (shown below)

By clicking on this you will be redirected to a demonstration page (see below) with highlighted regions. This enables you to see where your block will appear. Remember the name of the location of where you would like to put your block and exit the demonstration.

3. You will be redirected back to the blocks page. Click on add block
4. Add a Title to your block (optional) – the users will see this title

Add a Description – seen by you on the blocks page

Add some content to the body

5. Region Settings: specify the region in which the block should be displayed → see the highlighted regions above

→ Note: if –none– is selected the block will not be visible

6. Configure the settings:

- Pages: either show block on specific pages or on all of them. Use <front> to display on the front page

→ Note: the French and English pages do not have the same URL

- Languages: if the block needs to be translated make it translatable and show this one only for the specific language, otherwise leave everything unchecked

- Content types: show block only for specific content types. Leave everything unchecked

- Roles: show this block only for specific types of users. Check accordingly. If nothing is check, the block will be visible to everyone

- Users: check not customizable

7. Save block

Note: you can change the location of the block on the blocks window (see below). Always scroll down the page and save the new configuration when you are done.

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**VII. Menus**

Definition: a collection of links (menu items) used to navigate a website. The main menu, is the one that concerns us, as these are the links that all of the users will see when they go to the webpages.

Steps:

1. Go to: Structure → Menus
2. Click on list links of the ‘main menu’

3. A window with all of the main menu links on the webpage will appear. (shown below) From here you can easily change the weight of the different links to tweak the order. Make sure that you always scroll down the page and save the configuration to make sure that the new order is preserved. Also if you want to create a link on the menu that send directly to another page/URL (ex: Madeleine’s Corner) select add link. From here you will be prompted to add a title and a path. You will also be able to change the weight of this new link and select a language. Similar to creating a basic page with menu link.

VIII. Multimedia: Inserting Images and Videos into the Body of Content Types

Inserting an image into the body of a content type (ex: article, basic page) consists of copy pasting. The only thing that you will want to watch out for is that the text format is full HTML.
Inserting a video on the other hand requires a few additional steps.

1. Find the video you want to insert
2. If it is a YouTube video for example, you will want to find the 'embed' piece of code. To find this, go to share → embed (see below)
3. Make sure the text format is 'Plain text' and copy and paste the code.
4. Now switch back to ‘Full HTML’ and a box like the one below will appear. This is where your video will appear when you save the block
5. Save the block and exit the edit window

Note: If you would like to find out how to make a slideshow, watch: https://www.youtube.com/watch?v=IoUg69kNy5s&index=44&list=PL15BE2E8313A4E809

IX. Taxonomy
Definitions: taxonomy is Drupal’s way of organising content. Related terms are grouped in vocabulary lists. Additionally, terms can be associated with content through the process of tagging.

Steps:

1. Go to Structure → Taxonomy
2. From here you can either add a new vocabulary – list of terms OR add/edit terms in one of the existing vocabulary lists.
   - New vocabulary: click on add vocabulary. You will then be prompted to add a title to this vocabulary. After this, you will have the option to add terms to this vocabulary
   - Add/Edit terms: to add terms you can directly add them from the taxonomy window by clicking ‘add terms’ or click on ‘list terms’ and then ‘add terms’. To edit terms – click on ‘list terms’ and then ‘edit’ next to the term you want to edit.

X. Restricted Access

You might want to restrict access to certain content types. For example you might want a page that can only be seen by certain users, or maybe images that should only be shown to certain people. In order to do this go to Configuration → People → Nodeaccess. From this window you will be able to control who can view, edit and delete all of the different types of content. For example, you might want to create a CERN Only Basic Page content type.

XI. Making your website Multilingual

You might want to make your website multilingual, so that it’s both in French and in English for example. To achieve this, you will need to download a few modules. I also suggest watching this video (https://www.youtube.com/watch?v=lW8eimp54yM) which explains everything step by step.

Note: Drupal provides the functionality to make a website bilingual, however it does not provide the translations. You will need to provide the translations yourself.

Steps:

1. Download the Entity Translation and Internationalization modules (you might also need the Variable module)
2. Activate the modules. Go to Modules. Search for both Entity Translation and Internationalization modules
3. You will then most likely be asked to activate some more modules
4. You will also want to activate Field Translation. Taxonomy Translation and variable Translation
5. Once done, check that all of the modules have been properly activated – you’re now ready to add some languages to your website
6. Go to configuration → Regional and Language → Languages → Add Language
7. Select one of the Predefined Language and Select ‘Add Language’. If it isn’t one of the available languages you can create a custom language of your own. Once your language is created you will have a defined path prefix – this will help you distinguish between the instances of your website in the different languages. You do not need to add a second English language as is done in the video.

8. You then need to add the detection and selection criteria

9. Select URL detection method for both the user interface and the content and click ‘Save settings’

10. You will then need to activate the translation for all the relevant content types

11. Go to Structure → Content Types

12. You will then want to edit the relevant content types. In ‘Publishing options’ select ‘Enabled with field translation’ and select ‘Hide content translation links’

13. Once you’re done save the content type. Follow the same steps for all of the other content types

14. Go to Modules and search Entity Translation

15. To the right, there is a drop down option for this module. Select ‘Configure’
16. From here you can decide which entity types can be translated. Make sure node is selected
17. Under the Node tab you will see all of the different content types which have translation enabled
18. If you write predominantly in one language you can set it as the default language here. You will want to ‘Exclude language neutral from the available languages’
19. Once you’re done save the new configuration

![Drupal User Guide](image)

Note: If you struggle to translate content, make sure you have downloaded the Title module. You will then need to go to each content type and replace the necessary fields. You will be prompted with a replace option in the operations options. (Go to Structure → Content Types and select ‘manage fields’ for the relevant content types)

For each field you will need to enable the translation if required. For example to enable the title field: click ‘edit’ and scroll to the bottom of the page. Under the ‘Field translation’ section you will see the options below. If the field is not already translatable you will have the option ‘Enable translation’ instead of ‘Disable translation’ shown below. Click ‘Enable translation’ if necessary and then ‘Confirm’. Once you’re done save.

![Title Field Translation](image)

20. You’re nearly done, the only thing left to do is add a ‘Language Switcher’ block so that you can easily swap between the two languages.
21. Go to Structure → Blocks and enable the ‘Language Switcher (user interface text)’ block. I recommend putting it in the header section
22. You now need to add some translations for your content. Follow the translation steps in section ‘II. Creating a Basic Page’. Remember you will need to provide all of the translations.
XII. Cloning a Website

Cloning a website is a very easy process.

Steps:

- Go to the destination site
- Go to [name of your website].web.cern.ch/_site/clone
- Choose the site that you wish to clone from and click on “Clone from”

If you have any problems please refer to this forum post on ENTICE: https://entice.web.cern.ch/clone-site
and also have a look at this user guide: http://information-technology.web.cern.ch/book/drupal-infrastructure-services/site-management/clone-site

XIII. Creating a RSS feed

You may want to add a RSS feed to the webpages. RSS feeds can make the content more dynamic, without having to do extra work. A few feeds are already included, such as the recent publications. If you see this symbol (borah) it means that there is an RSS feed available for this content.

Steps:

1. Go to Configuration → Web services → Feed aggregator

2. A window showing all of the current feeds and their last and next updates will appear
3. Click on add feed
4. Give your feed a title
5. Find the URL of the feed. Remember to look for this symbol -  📢
6. Choose the update interval and the number of items in your block
7. Go to Structure → Blocks
8. Find your feed block, the name will be something similar to ‘[title] feed latest items’ and change its region location
9. Go back to feed aggregator and click on update items
10. Your feed should then appear in the designated location

Note: To add a feed from the CERN Document Server, please refer to this link [https://twiki.cern.ch/twiki/bin/view/CDS/CERNDocumentServerBrowserIntegration] for more information. After you type a query, at the bottom of the page, you should see the RSS feed option.

XIV. Useful Links

CERN specific Drupal forum:

https://entice.web.cern.ch/forums/general-discussion

- Useful for general questions about Drupal and also CERN specific questions

Drupal First Time User Guide:

https://www.drupal.org/node/877140

- Gives a good overview of Drupal giving a feel for how it works
- Insights and links to start learning

Drupal Overview (YouTube Video):

https://www.youtube.com/watch?v=25-RMAPtYnQ

- Good video to get started
- Builds a simple website from scratch

Drupal Tutorials (Series of YouTube Videos):

https://www.youtube.com/watch?v=r6rIIB4-xoE&index=4&list=PL15BE2E8313A4E809

- Simple to more advanced tutorial
- Each tutorial focuses on one particular feature of Drupal

Making a Drupal 7 website multilingual (YouTube Video):

https://www.youtube.com/watch?v=lW8eimp54yM
- Goes through the whole process of making a website multilingual
- Step by step instructions