

Drupal User Guide

UCSF Inflammatory Bowel Disease Center (IBD)

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Drupal User Guide

Getting Started

Web Addresses

To access the IBD site, go to the following addresses:

- <http://ibd.ucsf.edu/> - the public version of the site.
- <http://ibd.ucsf.edu/user/> - the Drupal CMS Dashboard.

Drupal User Accounts

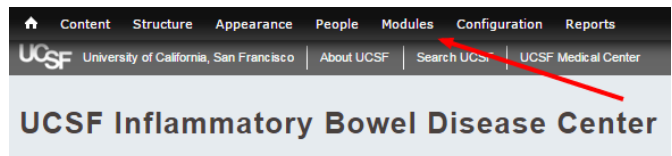
To access the Drupal CMS (Content Management System) and edit the IBD site, you will need a user account. We have created the following user accounts for you:

- ucsf_admin / (password)
- bmalynn / uc\$f1bd

Creating New User Accounts

Create new user accounts by doing the following:

- Login at <http://ibd.ucsf.edu/user/>.
- Click on **People** in the Drupal menu at the top.
- Click on **+ Add User**.
- Fill in the following information:
 - **Username:** first initial and last name is typical.
 - **E-mail address**
 - **Password and Confirm password:** this can always be updated later by the user.
 - **Status:** Active.
 - Note: you can also set a user to Blocked. This would keep the user account but no allow him to login.



- **Roles:**
 - **Authenticated user:** should always be checked.
 - **Editor:** can edit and publish, but does not have admin privileges.
 - **Administrator:** has all privileges.
- **Notify user of new account:** check this if you want Drupal to send an email to this user.
- Click **Create new account**.

Editing a Page

To edit a page, follow these steps:

- First, navigate to the page you want to edit.
- Click on the **Edit** link under the page title.
- Note: you must be logged in to see the **Edit** link.
- This will take you to the **Edit basic page** screen.



Title

At the top, you will find the **Title** field. Editing this will change the page's title as well as the title listed in the user's browser. Note: it will not change the title of this page in the navigation menu. That will be discussed below.

Body

Within the large **Body** field, you will find the main content of the page. Here you can do the following:

Adding or Modifying Text

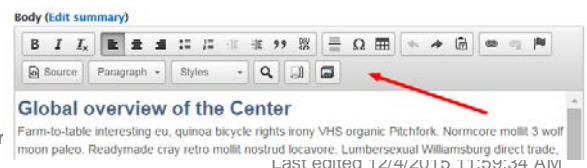
- Type directly into the **Body** field to add, edit or delete text.
- Paste text directly into the **Body** field from another document to add text.

Formatting Text

Using the Toolbar

Most of the buttons in the **Toolbar** should look familiar. Though you can use all of these to format your text, you should only use the following subset in order to keep the look and feel of the site consistent.

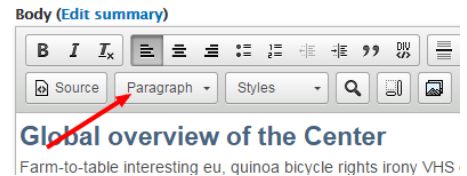
- **Bold** and *Italic*.



- Bulleted and Numbered Lists.
- Inserting Horizontal Line.
- Inserting Special Character.
- Note: hitting Enter will give you a paragraph space whereas Shift+Enter will give you a line break.

Using the Format Menu

Additionally, you can format the Headings in your text via the **Format Menu**. To access these styles, use the **Format Menu** as seen in the screenshot to the right. Here are a few formatting notes:

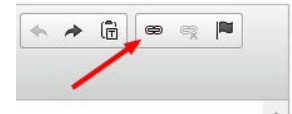


- **Paragraph:** this is the default text.
- **Headings 2 through 6:** these should be used in semantic/hierarchical order. Note: Heading 1 is not listed as it is reserved to be used for the page title only.
- **Note:** the **Format Menu** will show the name of the format selected when you click on any text in the **Body** field.

Inserting a Link

You can add a link to text or an image. To do so, follow these steps:

- In the **Body** field, highlight the text or click on the image that you want to link.
- Click on the **Link button** in the **Toolbar** (see right).
- In the **Link** popup, edit the following:



- **Link Type:**

- **Internal path**

- Use this to link to another page on the site.
- In the **Link** field, type in the page name and a list of pages will be provided.
- Select the correct page.

- **URL**

- Use this to link to another site (external links).
- Under **Protocol**, you'll either select http:// or https:// (if it's a secure site).
- Under URL, enter the rest of the web address (e.g. www.google.com).

- **Link to anchor in the text**

- Not used on the site.

- **E-mail**

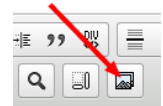
- Under **E-Mail Address** enter the correct address (e.g. name@ucsf.edu).
- You can also add text in the Message Subject line and Message Body, but it is not required.

- **Target Tab**
 - For external links, set **Target** to **New Window (_blank)**.
 - This will open the link in a new window or tab.
- **Advanced Tab**
 - In the Advisory Title field, enter a short phrase that tells the user where the link will lead.
 - For example:
 - Email Jane Doe.
 - Link to Google.com.
- Click on the **OK** button.
- **Note:** in order to test the link you will need to either **Preview** or **Save** the page first.

Inserting a Link to a File (PDF)

To set a link to a file (e.g. a PDF or Word document), follow these steps:

- In the **Body** field, place your cursor where you want the file link to appear. Note: for PDF's and other files, you will want to have the link be on its own line.
- Click the **Add Media** button (see right).
- In the **Add Media** popup, you can upload a new file from your computer by going to the **UPLOAD tab** and clicking **Choose File**.
- After you have chosen the file click the **Upload** button. Note: files must be less than 256 MB.
 - Note: if you wanted to link to a PDF that you have previously uploaded to the site, go to the **LIBRARY** tab and look for your file. Once found, click on it and click **Submit**.
- On the next panel, under **Local Options** select **Display as Default**.
- Click **Submit**.
- Back in the **Body** field, select the new link and then click the **Link** button.
- In the **Target** tab, select **Target New Window (_blank)**.
- In the **Advanced** tab, enter a description of the link in the **Advisory Title** field (e.g. Research Study PDF).
- Click **OK**.
- Test the link by either clicking **Preview** or **Save** at the bottom of the page.



Inserting an Image

To insert an image on your page, follow these steps:

- In the **Body** field, place your cursor where you want the image to appear.
- Click the **Add Media** button (see right).

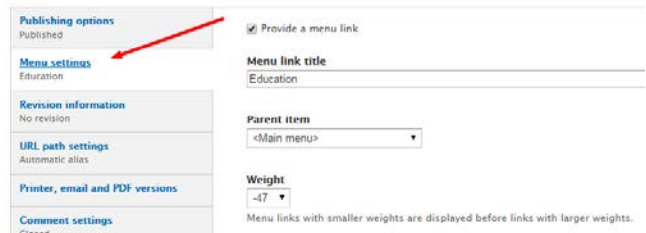


- In the **Add Media** popup, you can upload a new image from your computer by going to the **UPLOAD** tab and clicking **Choose File**.
- After you have chosen the image click the **Upload** button. Note: files must be less than 256 MB.
 - Note: if you wanted to add an image that you have previously uploaded to the site, go to the **LIBRARY** tab and look for your image. Once found, click on it and click **Submit**.
- On the next panel, click on the **Edit file / crop** link (see right).
 - In the **Alt text** field, enter a short phrase that describes the image. Screen reading software will read it to sight impaired visitors. Note: other visitors will not see the **Alt text**.
 - In the **Image caption** field, you can enter a caption for the image. This will be displayed just under the image.
- Under **Local Options** choose the following:
 - **Display as:**
 - This will determine the size and the display shape of your image.
 - Once you select one, Drupal will show you what it will look like.
 - **Wrapping:**
 - None: the image is left aligned and there is no text on its left or right.
 - Left image: the image is left aligned and the text that follows will align to its right.
 - Right image: the image is right aligned and the text that follows will align to its left.
 - Click **Submit**.
- Test the layout of the new image by either clicking **Preview** or **Save** at the bottom of the page.



Menu Settings

Edit the following to change the page's display in the navigation menus:



- **Menu link title:** enter the title that you want displayed in the menus. Note: this should match the page title to help with user orientation.
- **Parent item:** select the parent for this page. For example, if you are creating a page that will be in the About Us section, select About Us as the parent.
- **Weight:** this determines the menu listing order of pages that have the same **Parent**.

Editing a News Article

Editing a News Article is very similar to editing a page. The main differences are highlighted below.

News Image

You can set an image for each news article. Not only will this image be displayed in the article itself, a thumbnail version will be displayed next to the news article's title on listing pages.

Sort Order

By default News articles are listed by publish date, in reverse chronological order.

Editing Site-wide Blocks

Editing the Site Name

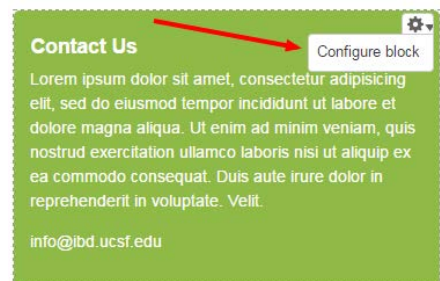
The site name, which is currently *UCSF Inflammatory Bowel Disease Center*, can be edited by doing the following:

- In the Drupal menu, hover over **Configuration / System** and click on **Site information**.
- Edit the **Site name** field.
- Hover over the Contact Us block area and a **Gear** icon will appear.
- Click on the **Gear** icon and then click on **Configure Block**.
- Edit the **Block title** and/or the **Block body**.
- Note: do not edit any other fields.

Contact Us Box (green)

The green Contact Us block that is displayed in the right column of most pages can be edited by doing the following:

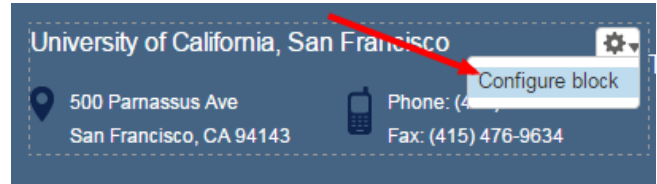
- Hover over the Contact Us block area and a **Gear** icon will appear.
- Click on the **Gear** icon and then click on **Configure Block**.
- Edit the **Block title** and/or the **Block body**.
- Note: do not edit any other fields.



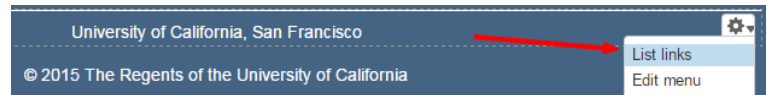
Footer Contact Info

The contact info that is listed in the bottom left of all pages can be edited by doing the following:

- Hover over the area and a **Gear** icon will appear.
- Click on the **Gear** icon and then click on **Configure Block** link.
- Edit the contact info in the fields provided. Note: be sure not to edit any non-contact info fields.



Footer Copyright Info



The copyright info that is listed in the footer can be edited by doing the following:

- Hover over the area and a **Gear** icon will appear.
- Click on the **Gear** icon and then click on **Configure Block** or **List links**.
- Edit the info in the fields provided. Note: be sure not to edit any non-contact info fields.