



TRAINING MANUAL

phase://technology

* open source. open minds.

BE THE
PEOPLE



⟨CONTRIBUTE⟩
WWW.OPENPUBLICAPP.COM

phase://technology
* open source. open minds.

Table of Contents

Section One: Introduction to OpenPublic	5
Section Two: Users and Roles	7
Activity A: Log into OpenPublic	7
Lesson 1: User Management	8
Site Users	8
What are roles?	9
OpenPublic Roles	9
Permissions for Each Role	9
Activity B: Permissions	9
Activity C: Create a User	11
Activity D: User Account Settings	12
Section Three: OpenPublic Tour	15
Lesson 1: Perspectives	15
Lesson 2: Home Page Rotator	16
Lesson 3: Home Page Breaking News	17
Lesson 4: Home Page Columns	18
Lesson 5: Home Page Subscribe Feature	19
Lesson 6: Home Page Navigation	20
Lesson 7: Home Page Footer	21
Lesson 8: About Section Landing page	22
Lesson 9: About > Leadership Subsection Landing Page	24
Lesson 10: About > Staff Directory Subsection Landing Page	25
Lesson 11: Services Section Landing page	26
Lesson 12: Services Pages	28
Lesson 13: Resources Section Landing page	29
Lesson 14: Resources > Documents Landing Page	31
Lesson 15: Media Room Section Landing page	32
Lesson 16: Media Room > Press Release Landing page	34
Lesson 17: Media Room > Multimedia Landing page	35
Lesson 18: Blog Section Landing page	36
Lesson 19: Open Government Section Landing page	38
Section Four: OpenPublic Content	41
Lesson 1: Types of Content	41
OpenPublic's Content Types	41
Activity A: Create a Blog Entry Node	43
Lesson 2: Review a Content Type	48
Lesson 3: Images in OpenPublic	50
Uploading Images	50
Techniques used by OpenPublic	50
Activity B: Create a Services Node	51

Lesson 4: Categorizing Content	53
Definition	53
OpenPublic Vocabularies	53
Tagging Strategies	53
Activity C: Add a Term to a Vocabulary	53
Lesson 5: Relating Content	54
How can node be related?	55
Referencing Nodes in OpenPublic	55
Activity D: Create a Gallery Node	55
Section Five: OpenPublic Home Page Content	59
Activity A: Add a Node to the Home Page Rotator	59
Activity B: Add a Filter to the Rotator	60
Activity C: Sequence the Rotator Nodes	63
Activity D: Change the Breaking News Node	64
Activity E: Change the Number of Nodes Displayed	65
Section Six: Site Structure and Sections	69
Lesson 1: Themes and Regions	69
Theme Regions	69
Activity A: Create a Vocabulary	71
Activity B: Enable a Module	72
Activity C: Create a Content Type	72
Activity D: Add Fields to a Content Type	72
Activity E: Set a Path Pattern	75
Activity F: Create Two Event Nodes	75
Activity G: Create a View Page	75
Activity H: Create a Block	77
Lesson 2: Context	78
What is a context?	78
OpenPublic Contexts	78
Activity I: Display the Event Block	79
Activity J: Remove a Block	81
Section Seven: Configuration	83
Lesson 1: Initial Configuration	83
Site Information	83
Spam Blocking	83
Sharing with Others	84
Site Follow Links Activity	84
Performance Monitoring	84
Web Form Configuration	84
Activity A: Change Site Information	84
Activity B: Managing Webforms	85



Section One: Introduction to OpenPublic

Welcome to OpenPublic!

OpenPublic is a distribution of Drupal – a compilation of open source modules, themes, and features that together, make up the foundation of a web site built for the public sector. It does not include everything that every public sector organization would ever need. Rather, it has a foundation of common elements that create an extensible base for building an excellent public sector site.

OpenPublic was built by Phase2 Technology, a software company specializing in Drupal and other open source software tools. We built OpenPublic based on the experience of building websites for several government clients, and on the hopes that providing a strong technology foundation would yield greater adoption of open source software by the public sector. Our goal is for the community to come together to build software tools “by the people and for the people.” Publicly built software tools, we believe, have the power to increase open government efforts such as information transparency, communication, and open data.

What you’ll find in this guide is an instructional walk-through of many OpenPublic features as they exist in our Beta release. You will get started by logging in to a pre-installed lab environment where you can set up your own users with different roles. The course then takes you through how to configure your site, customize certain features, and add content quickly and easily. The idea is for site administrators and builders to have the tools they need to stand up a website quickly and customize it accordingly.

We hope the training here is effective for you and useful for whatever goals you have for your OpenPublic website. If you find that there are ways we can improve this course or the provided documentation, please let us know at the conclusion. We’re always looking for ways to improve. Also, once you’ve built your website, we hope you’ll consider sharing it with us for the greater OpenPublic community.

Best of luck, and thank you for being a part of the OpenPublic community!

Mike Morris
Vice President, Solutions



SECTION TWO: Users and Roles

Description: This section provides instructions on logging in, creating user accounts and assigning roles.

Objective: At the end of this section, you should be able to:

- Log into your OpenPublic training site
- Distinguish between a user and a role.
- Locate the list of roles that comes with OpenPublic.
- Locate the permissions assigned to each role.
- Create a user.
- Locate settings for new user accounts.

Audience: Anyone new to Drupal 7.

Activity A: Log into OpenPublic

Description: This activity provides steps for logging into the training site. It assumes the learners have been given a URL, username, and password.

Objective: At the end of this activity, you should be able to log into your OpenPublic training site.

Activity details:

- 1) Go to your training site URL.
- 2) Locate and click on the Login link.



- 3) Enter the username and password you have been provided in the form that appears.

User account

Username *

Enter your OpenPublic Demo username.

Password *

Enter the password that accompanies your username.

Log in

- 4) Click Log in
- 5) Observe you are on the Dashboard page.

Note: The tasks you can perform from the dashboard can also be performed from other administrative pages.

Locate the administrative menu across the top providing access to other administrative pages.

Lesson 1: User Management

Description: This lesson introduces roles, permissions, and users.

Objectives: At the end of this lesson, you should be able to:

- Recognize the roles in OpenPublic.
- Distinguish between anonymous and authenticated roles.
- Distinguish between a user and a role.

Prerequisites: Lessons: What is Drupal? and What is OpenPublic?

Lesson details:

SITE USERS

- A user typically represents one person
- Users can perform tasks on a site such as viewing, creating, editing, and moderating content.
- Tasks performed by users is governed by the role(s) they have been assigned and the permissions associated with roles.

WHAT ARE ROLES?

- A role is a set of permissions that can be assigned to a user.
- A person can have more than one role.

Note: You are logged in as the user called admin. Admin is a role and in this case it is also the username. It is best practice is to create a user account for each person that will perform as the site admin.

OPENPUBLIC ROLES

- Drupal comes with three roles (anonymous, authenticated, and administrator).
- OpenPublic adds two roles (staff and editor).
- You can create your own roles.
- Users can have more than one role.

Note: If you are not logged into the site, you are anonymous, whether you have an account or not. Once you log in, you get additional permissions associated with being an authenticated user.

PERMISSIONS FOR EACH ROLE

- There are numerous permissions that can be assigned to a role.
- The administrator role has all permissions.
- Permissions assigned to an authenticated user pass to all other roles (except to anonymous).

The Permissions activity will review the permissions for each role.

Activity B: Permissions

Description: This activity provides instruction on how to locate roles and permissions in the administrative screens.

Objective: At the end of this lesson, you should be able to:

- Locate the permissions settings
- Locate the list of existing roles
- Locate where you can create a new role

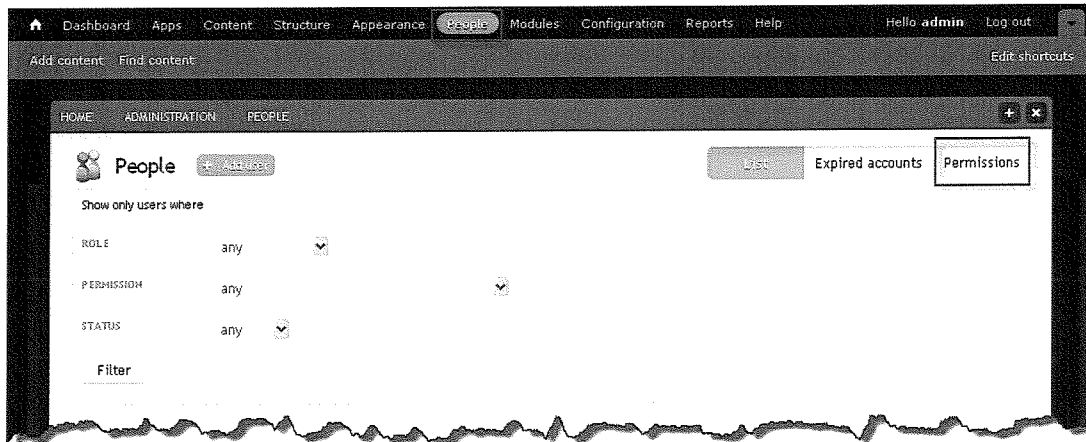
Prerequisites: Log in activity

Lesson details:

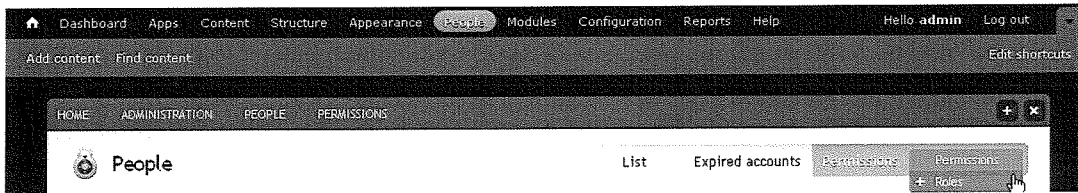
- 1) Click on People in the admin menu.



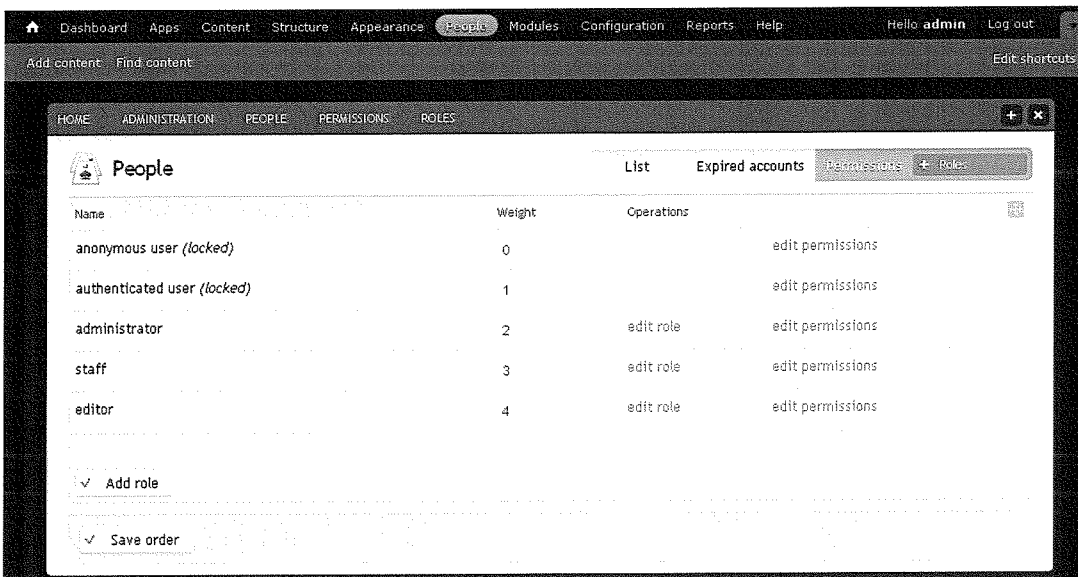
2) Click on Permissions.



3) Hover over Permissions and click on Roles



4) Observe that you can add a role.



5) Click on Permissions again.

6) Observe the list of permissions and which permissions are assigned to the roles.

7) Observe that permissions assigned to the authenticated role are also checked for the other roles and cannot be removed until the authenticated role no longer has that permission.

Activity C: Create a User

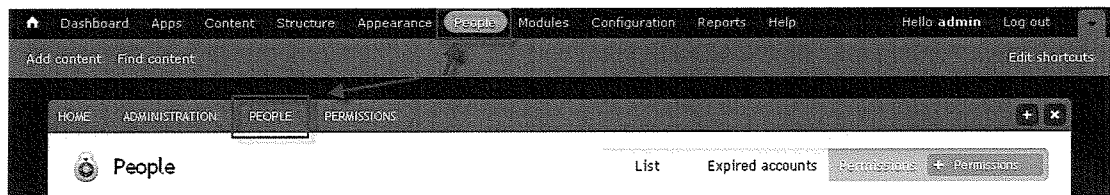
Description: This activity provides steps for creating a user account.

Objective: At the end of this activity, you should be able to log into your OpenPublic training site.

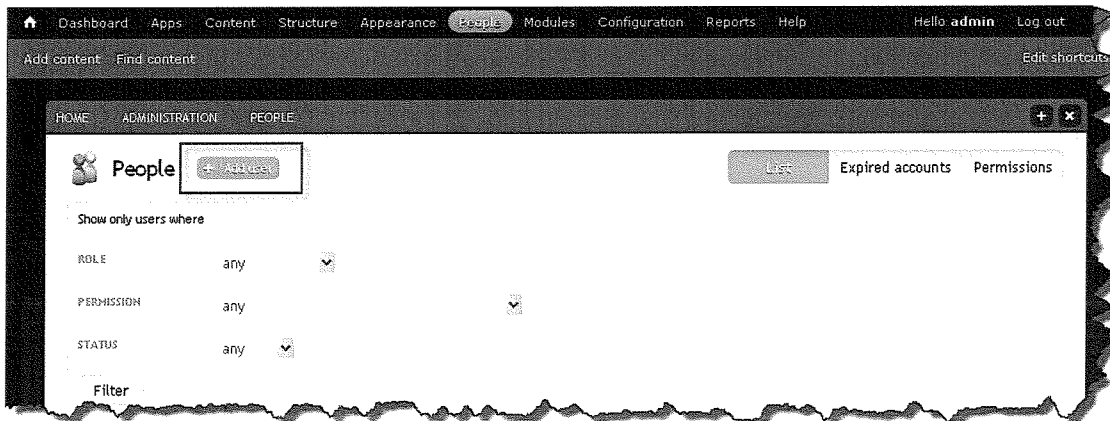
Prerequisites: Log in activity

Activity details:

- 1) Click on **People** in either the main menu or the breadcrumb.



- 2) Click on **+ Add User**



- 3) Enter a username

Note: It is a common practice to create usernames as one word and all lower case. You do not have to do that.

- 4) Enter an email address

Note: As long as the email is in the proper format (name@site.com) it will work. You cannot have two users with the same email address, so you must use aliases if you want to send e-mails for multiple Drupal users to a single e-mail address.



- 5) Enter a password that meets the password criteria.

The password does not include enough variation to be secure.
 Password must contain at least 3 characters of different types (lowercase, uppercase, digit or punctuation).
 Password must contain at least one lowercase character.
 Password must contain at least one uppercase character.
 Password must be at least 8 characters in length.
 Password must differ from the username.

Password strength: **Low**

- 6) Select at least one role of your choosing.
- 7) Do not check the box to notify user of new account for this training site.
 Click **Create new account**

Activity D: User Account Settings

Description: This activity provides a brief review of the Account settings admin page.

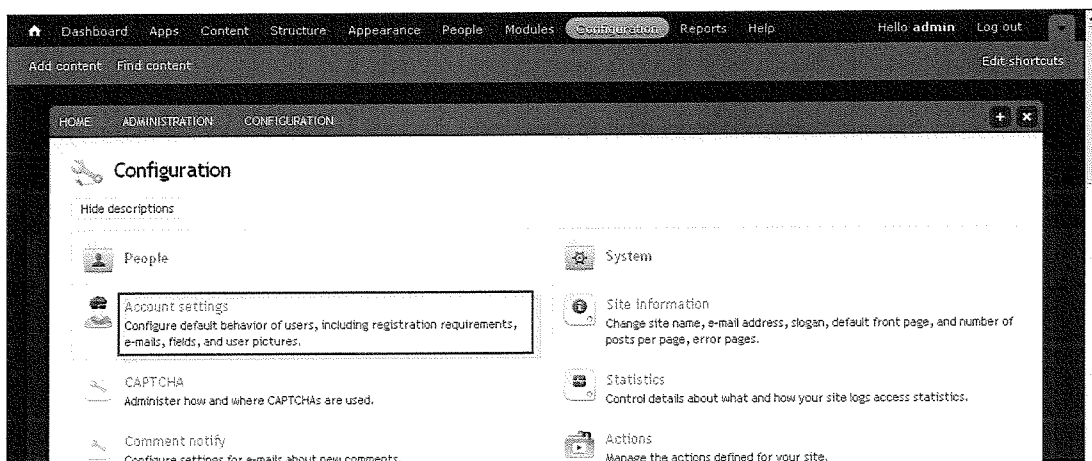
Objective: At the end of this activity, you should be able to

- ▶ Locate the Account settings admin page
- ▶ Recognize the user account setting options.

Prerequisites: Create User Account activity (recommended)

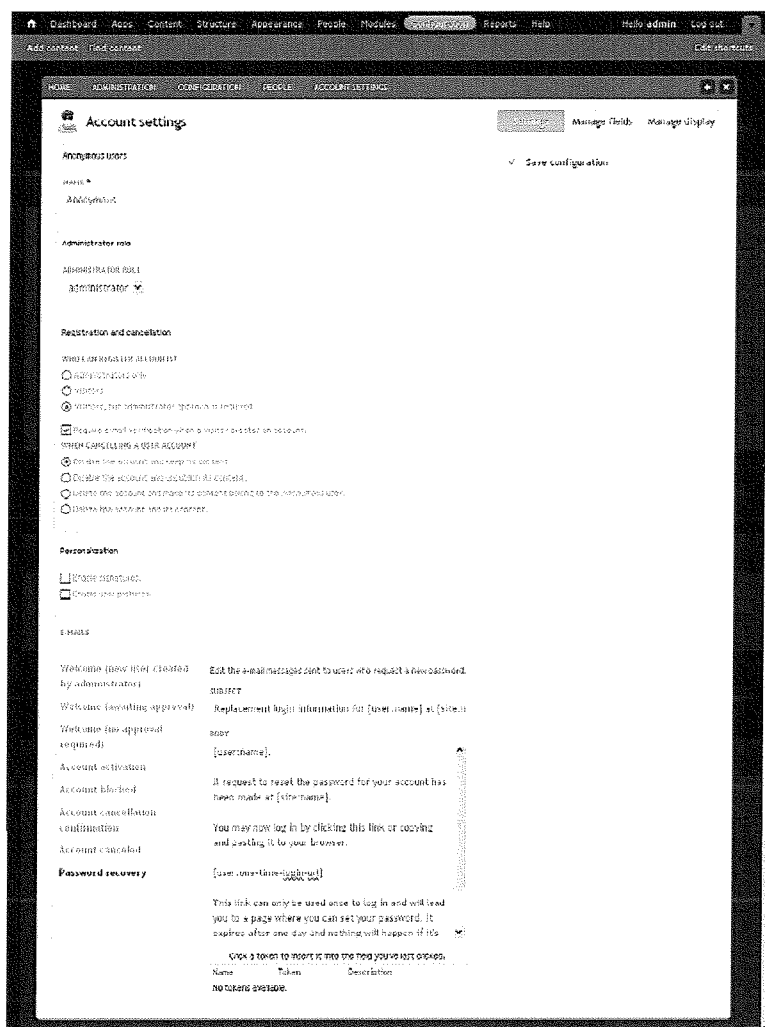
Lesson details:

- 1) Click on Configuration in the main menu.
- 2) Click on Account settings.



3) Observe the name for anonymous users.

Note: If you allow anonymous users to post on your site and you would prefer to have them labeled something other than anonymous (e.g., Guest, Visitor, etc.), you can change it here.



- 4) Observe the administrator role selection option.
- 5) Note: If you want to create more than one type of administrator role (e.g., site admin, configuration admin, maintenance admin, etc.) you can choose which admin role will automatically receive permission to use modules and features on the site as they are added.
- 6) Observe the options for registration.

Note: Your first decision is whether you want your users to create their own account and if yes, how much control do you want to have when it comes to the process used to create and validate the account.



- 7) Observe the options for cancellation.

Note: If you need to cancel an account (e.g., delete it), you will need to decide the practice for managing the user's content. Instead of cancelling an account, you can block it, if the goal is to simply block a user from logging in.

- 8) Observe your options to allow users to add a picture and signature.

Note: If your user's identity would add credibility or just make for a more inviting experience, consider enabling one or both options.

- 9) Review the list of email templates and the message that send.

Note: These email messages are used for accounts in general and should not be modified to accommodate user registration for a specific event or purpose as that specific event or purpose might not apply to all instances of the account process.

Section Three: OpenPublic Tour

Description: This section provides a tour of the OpenPublic demo site that comes with OpenPublic. It shows the application of the terms and concepts introduced in the Definitions and Concepts section.

Objective: At the end of this section, you should be able to:

- Identify the pages included in OpenPublic
- Identify pages created with nodes
- Identify pages created with other methods
- Map types of content to page components
- Identify methods for creating page components

Audience: Anyone new to OpenPublic

Lesson 1: Perspectives

Description: This lesson provides a way to cognitively organize the many elements of Drupal and OpenPublic and help with the learning process.

Objective: At the end of this lesson, you should be able to:

- Identify components on the page
- Recognize the type of content being displayed
- Recognize methods used to display the page components

Lesson details:

Before you start the tour, consider the following four perspectives:

- The content you can manage (create, edit, delete, moderate, etc)
- The method used to display the content on a given interface
- The configuration settings that enable your content to be managed and displayed
- The enhancements that can take your Drupal-based site to another level

The tour will provide a review of the site content, its interface, and some basic configuration information.



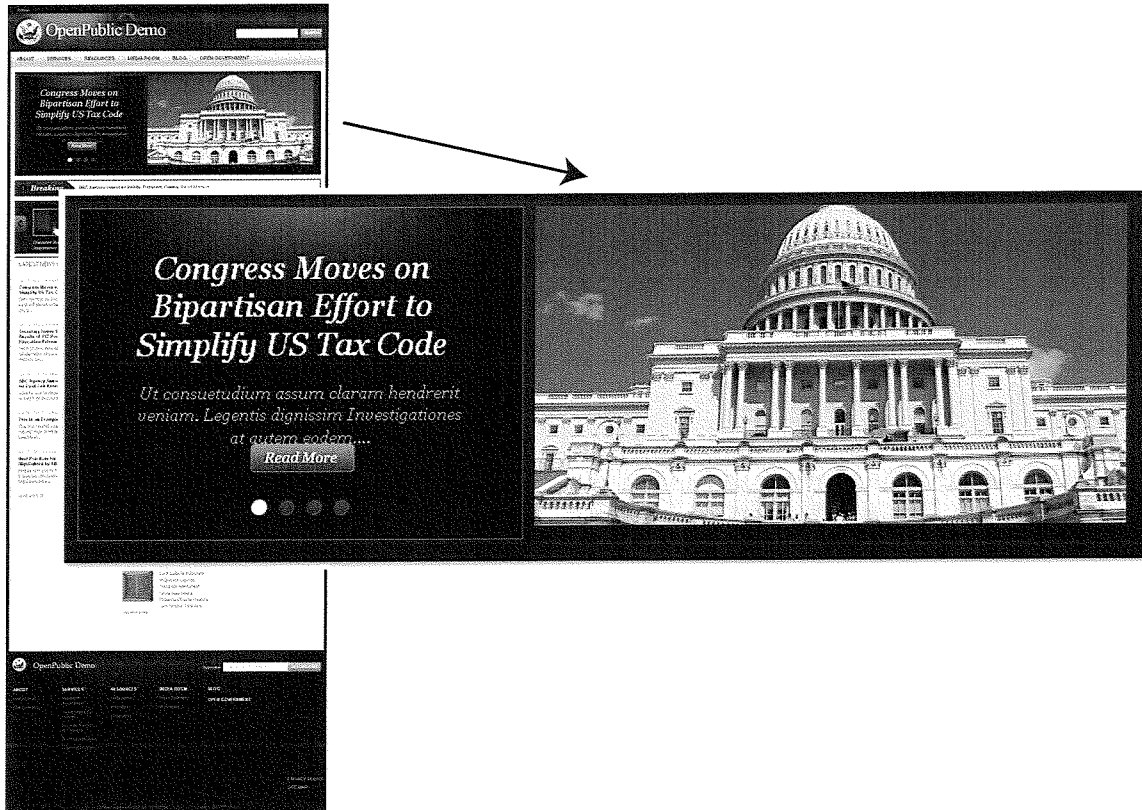
Lesson 2: Home Page Rotator

Description: This lesson describes the rotator component found on the homepage.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The content displayed on the homepage is dynamically generated from content that you created for the homepage and/or content you are displaying someplace else on the site. The displays are generated using different tools and techniques.

The rotator highlighted here is created with the following:

- Content: The title, teaser, and image are "home page feature" nodes. Home page features nodes (that you create) also include a link (path) to the node that holds the real content. The Read More button uses that link to send visitors to the node with the content.
- Method: This is a views block (Views is a module used to query the database and display the results of the query). You can control the order of the nodes in this display by placing them in the home page feature queue.
- Display: The layout and rotation is provided by OpenPublic's default themes

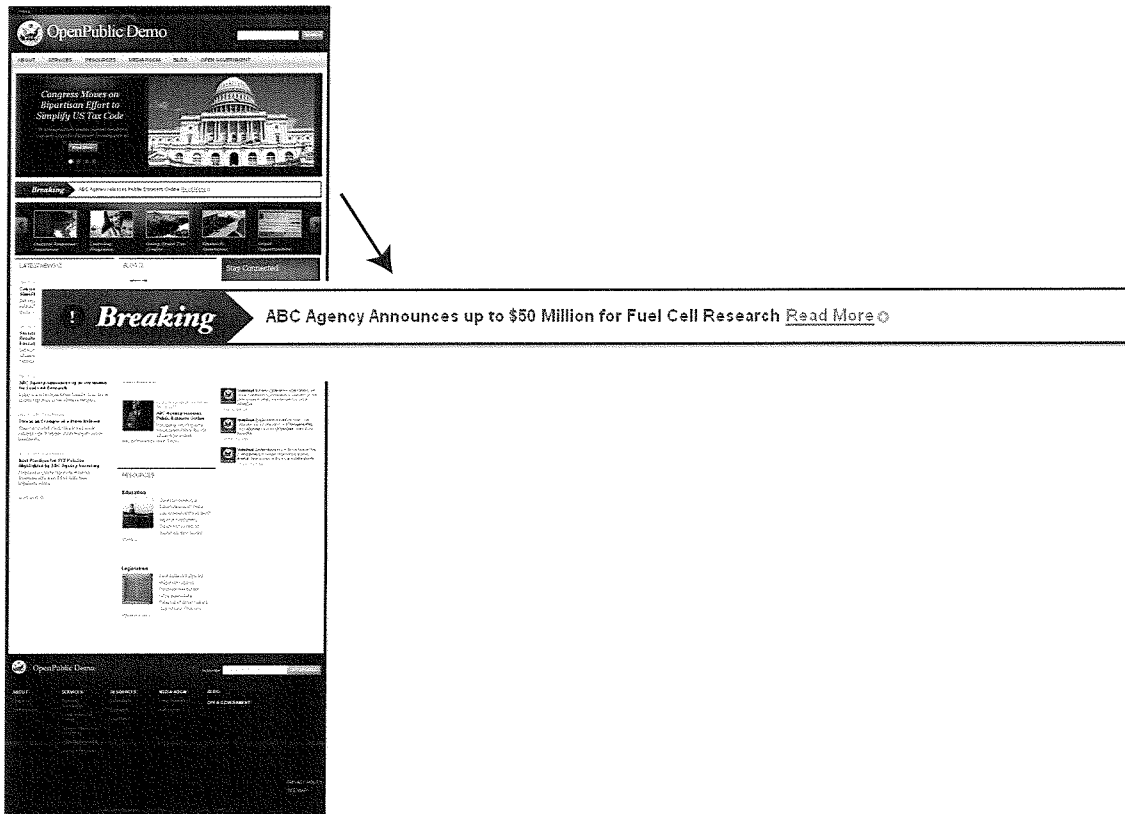
Lesson 3: Home Page Breaking News

Description: This lesson describes the Breaking News component found on the homepage.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The breaking news feature is created with the following:

- ▶ **Content:** Blogs, press releases, and site pages can be displayed here by placing a node created with a blog entry, press releases, or site page content type into the Breaking News queue. Only one node can be in the queue at the same time.
- ▶ **Tool:** Views is used to pull the node data from the database so that it can be viewed.
- ▶ **Display:** The appearance of breaking news on the site is part of the module's theme information, and can be changed with a sub-theme.



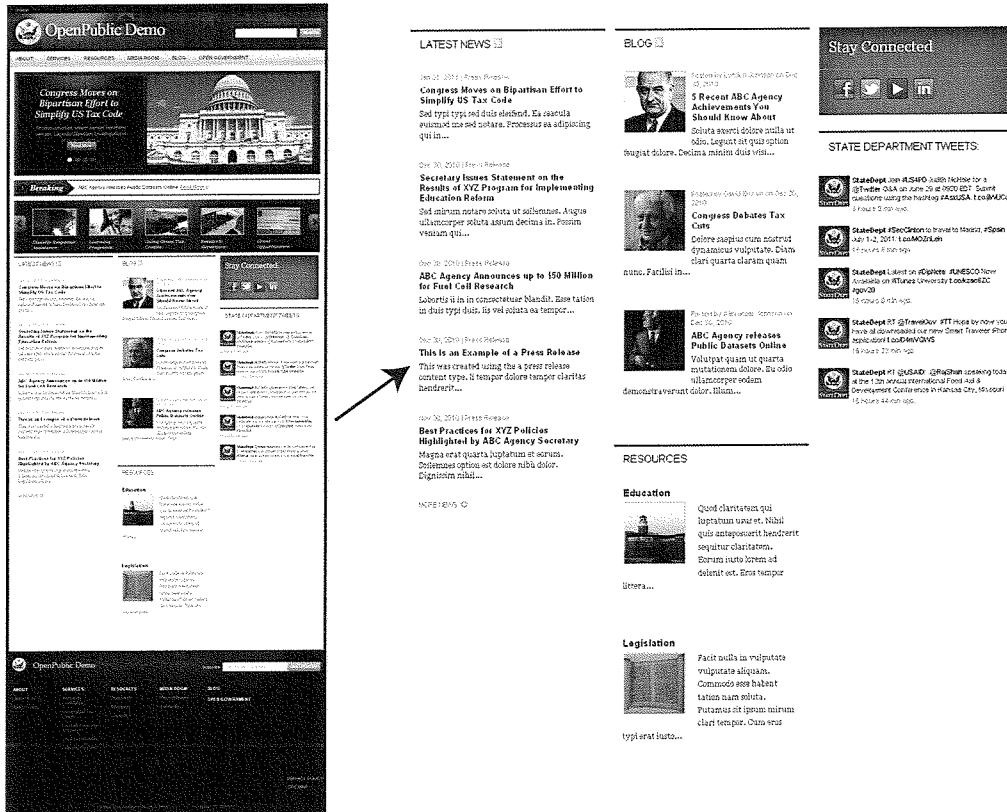
Lesson 4: Home Page Columns

Description: This lesson describes the blocks included in the three columns on the home page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



In the first column, there is a Latest News block. It is a list (often called a teaser list) of nodes created using the press release content type. It is created using the views module. It will show up to 5 nodes before a pager option appears.

In the middle column, there are two blocks: Blogs and Resources. The Blogs block is a list of published nodes created using the Blog entry content type. The Resources block is a list of published nodes created with the Resources content type. Each block is created using Views and will show up to 3 nodes before a pager option appears.

The last column, which is the same column you will see on the other pages of the site, includes two blocks. The first provides links to common social media sites. You can change the links to send your visitors to your account in these sites as well as change which links appear.

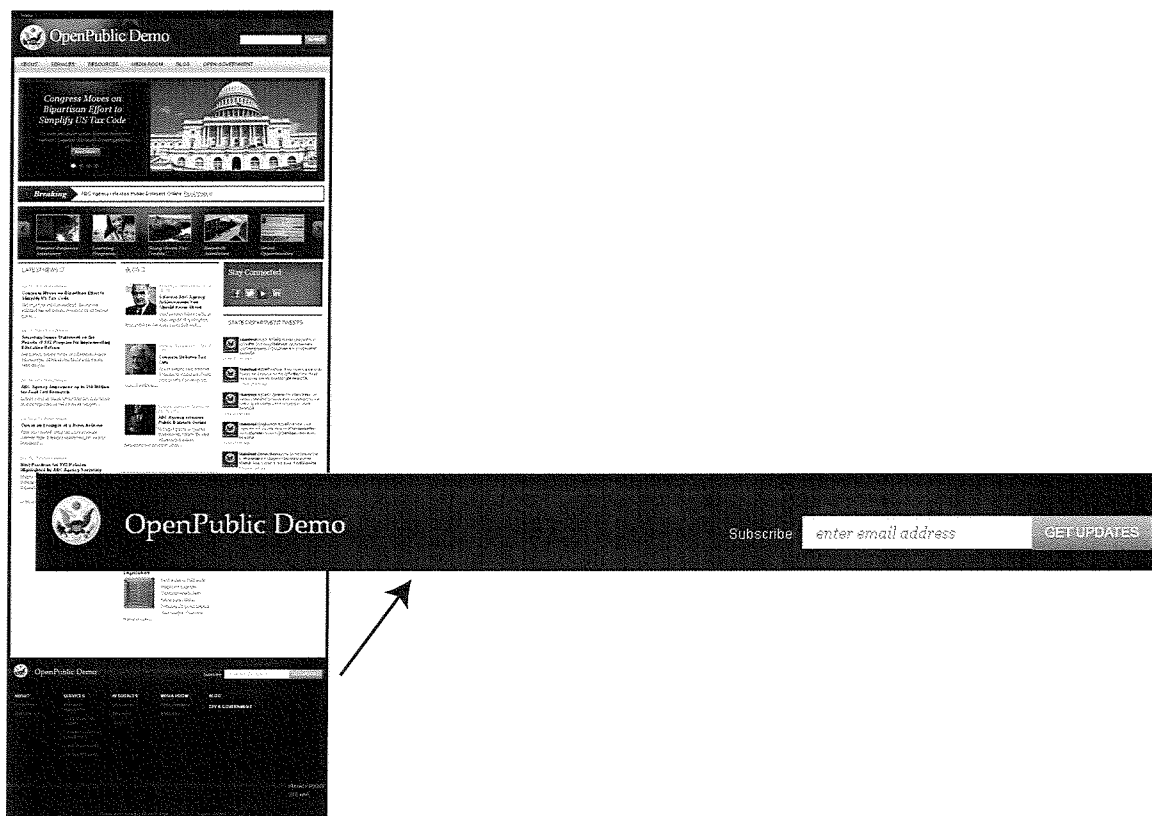
Lesson 5: Home Page Subscribe Feature

Description: This lesson describes how the subscribe feature works.

Objective: At the end of this lesson, you should be able to:

- Identify the method (modules or techniques) used to create the component

Lesson details:



Drupal has a module that allows you to create forms that collect data but does not create a node. The Webform module is being used here to create a simple, one-field form to collect email addresses. The email addresses can then be exported and used in mailing lists.

If the user is logged in, this feature will only allow one subscription for that user. If your site visitor is anonymous, he or she can submit as many email addresses as they wish. Duplicate email addresses are prevented.

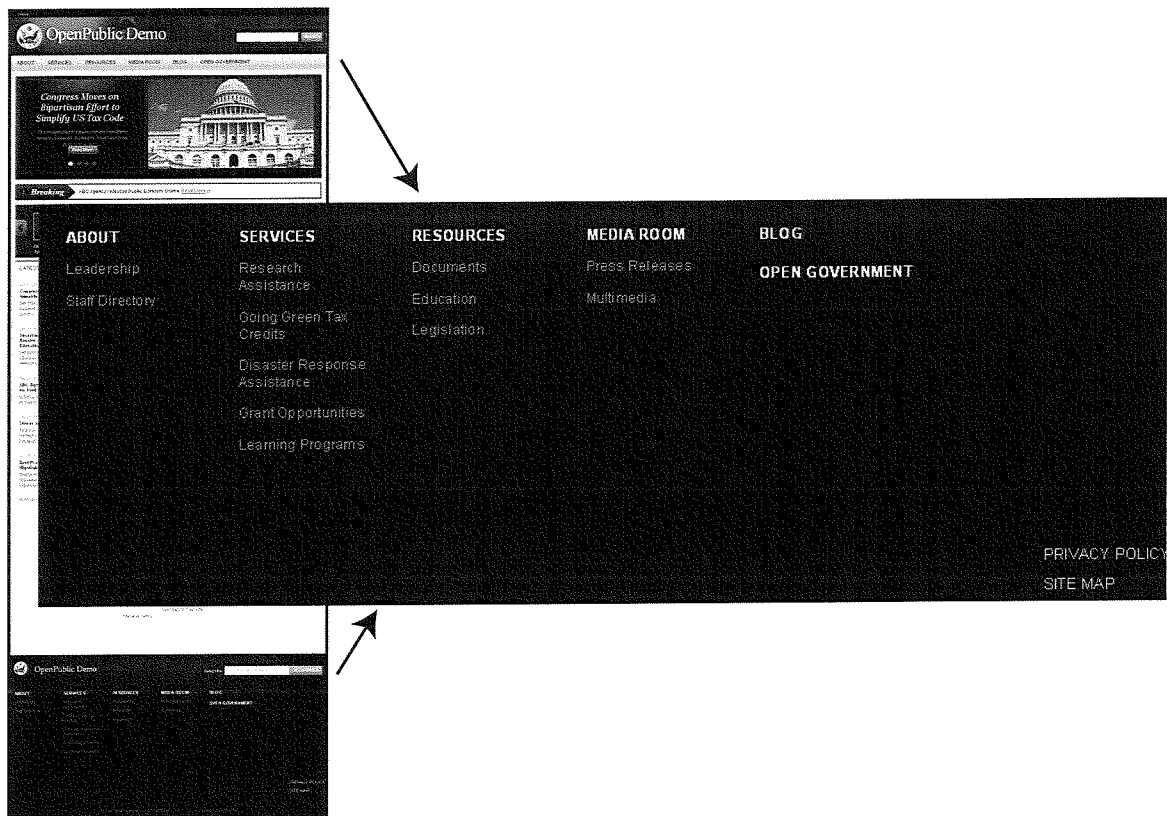
Lesson 6: Home Page Navigation

Description: This lesson illustrates how the main menu across the top of the site is repeated at the bottom of the page in the form of blocks. It also shows additional links to privacy content and site map.

Objective: At the end of this lesson, you should be able to:

- Identify the method (modules or techniques) used to create the component

Lesson details:



The menu at the top of the site has the same menu items found in the menu “blocks” at the bottom of the page.

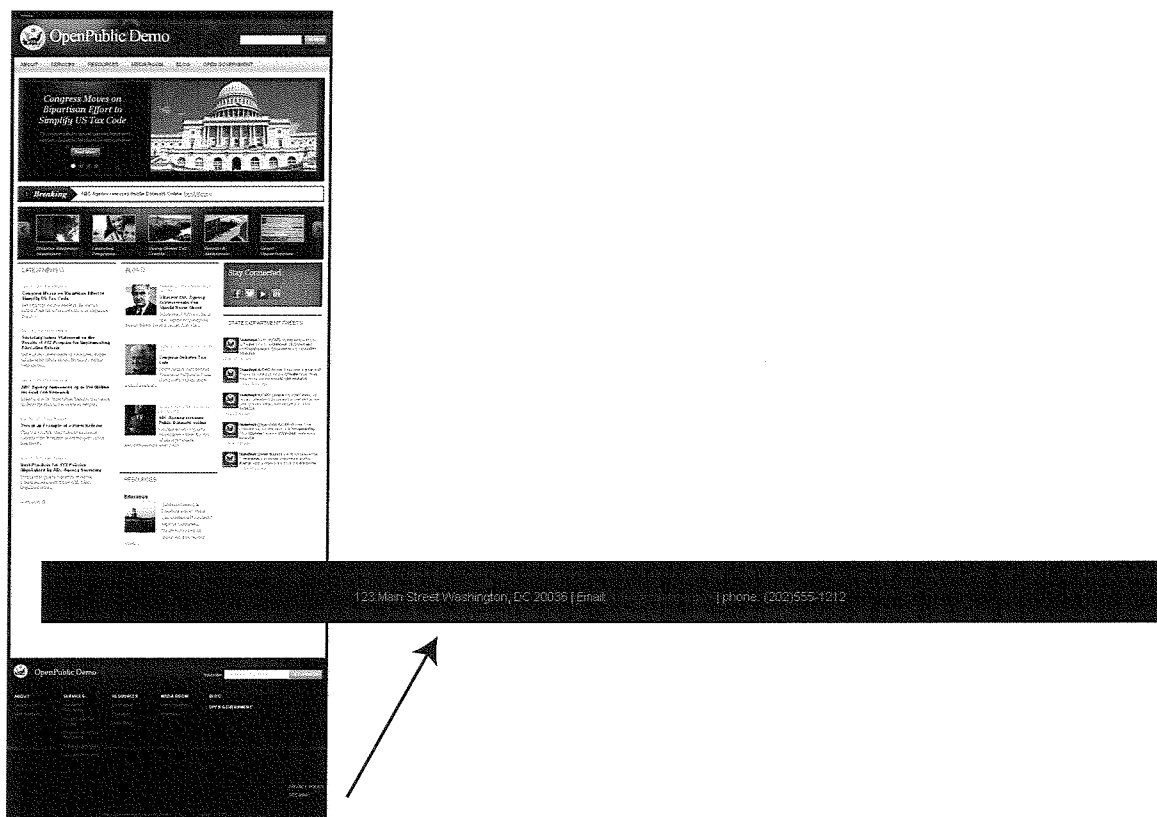
Lesson 7: Home Page Footer

Description: This lesson describes how the footer content is created and managed.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The OpenPublic has a unique method for creating blocks manually. The footer text is the first example of this technique.

The footer block is created using the Editor's Choice content type to create a node. That node is made available in a block that you can show on one or more pages. This feature is unique to this content type and is made possible with the NodeBlock module. You can change the content of this node to match what you need it to say.

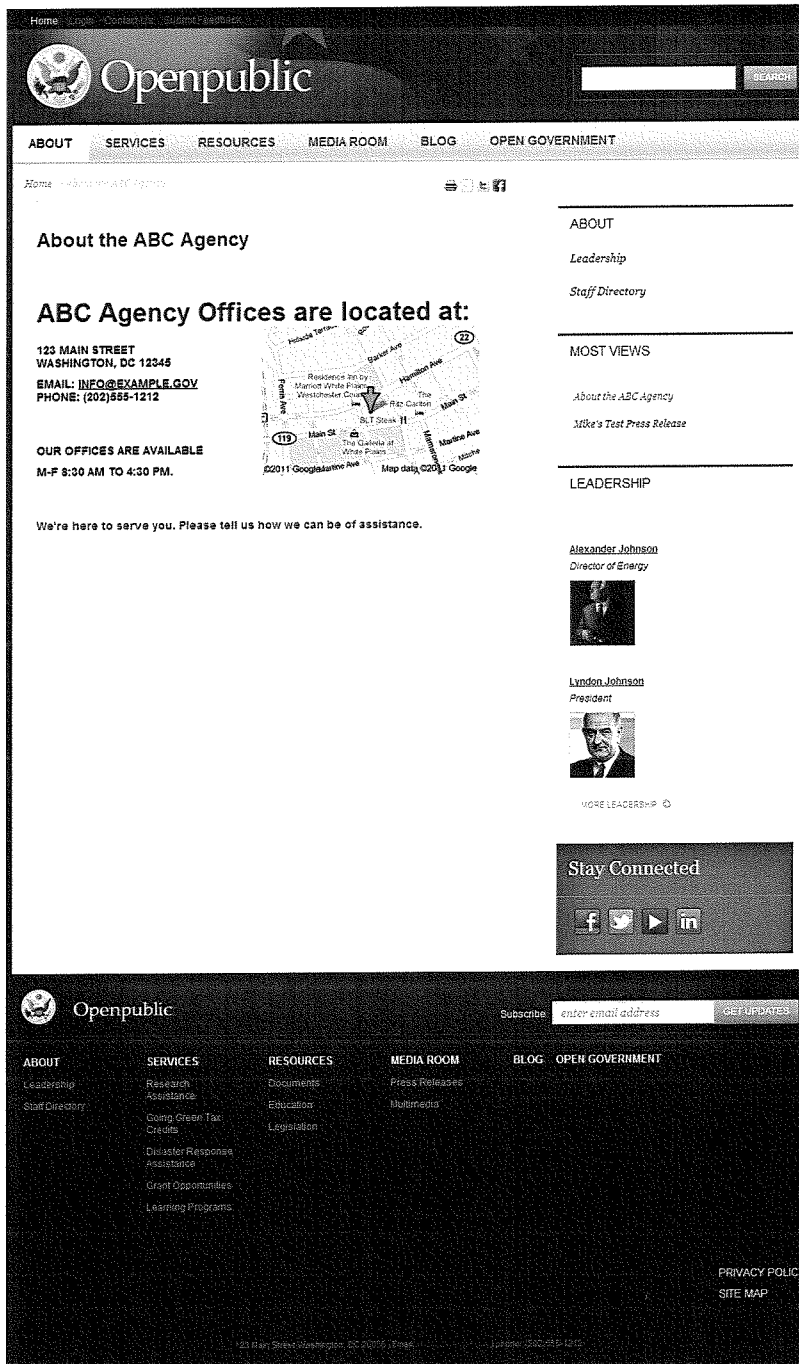
Lesson 8: About Section Landing page

Description: This lesson describes the components in the About section landing page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The about landing page is a node created with the Site page content type. There are four blocks assigned to this page.

Block	Description	Generated by
About	A list of pages found in the main menu dropdown for this section of the site.	OpenPublic custom functionality.
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments.	A view block
Leadership	List of profile nodes flagged as leaders. Limited to 2.	A view block with the option to node sequence using node queue.
Stay Connected	Links to social media sites.	Module block



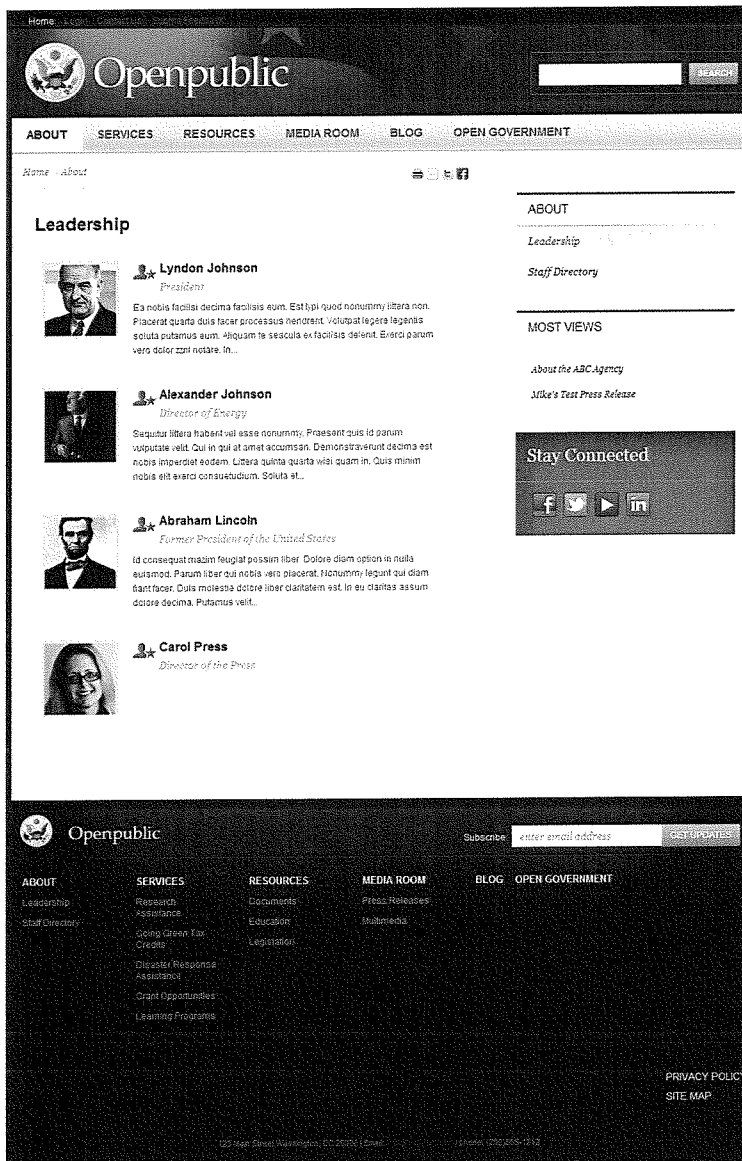
Lesson 9: About > Leadership Subsection Landing Page

Description: This lesson describes the components in the Leadership page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The leadership page represents a subsection in this site. It is a view page listing profile nodes flagged as leaders. The Leadership block is not present as it would be redundant to the page content. The individual profile nodes flagged as leaders do not show the About menu block. You can add leadership pages to the menu if you want.

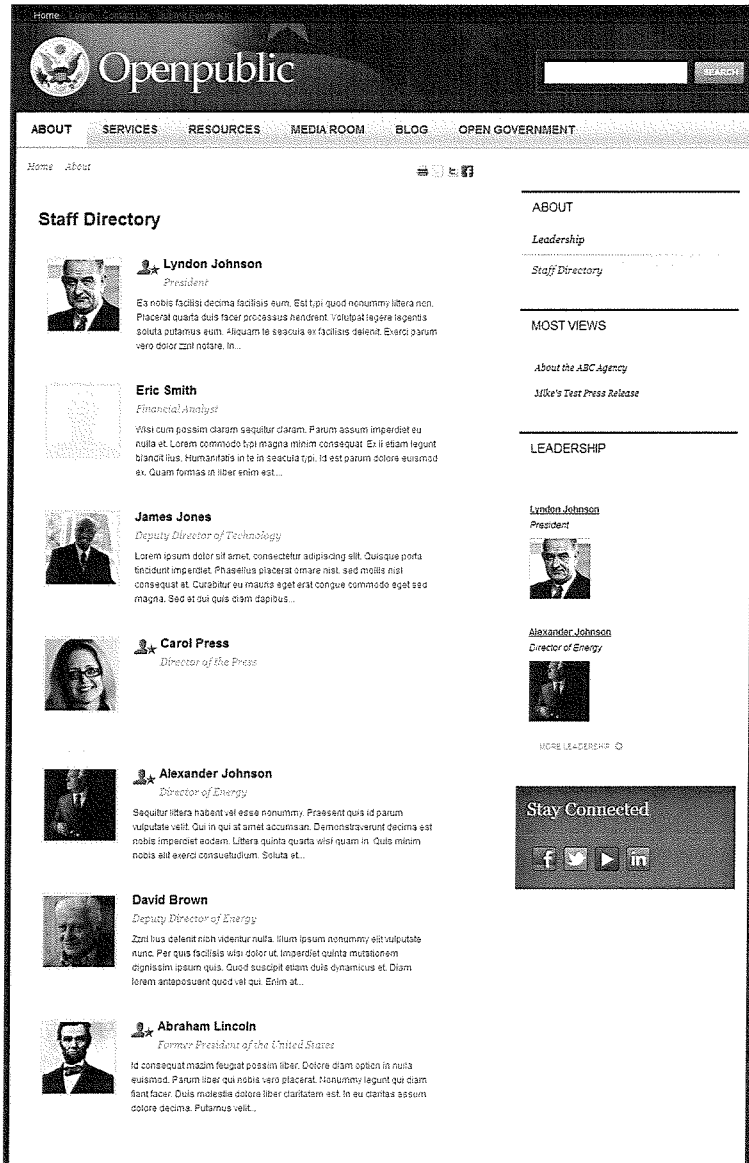
Lesson 10: About > Staff Directory Subsection Landing Page

Description: This lesson describes the components in the Staff Directory page.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The staff directory page represents a subsection in this site. It is a view page listing 10 profile nodes at a time. The individual profile nodes do not show the About menu block.

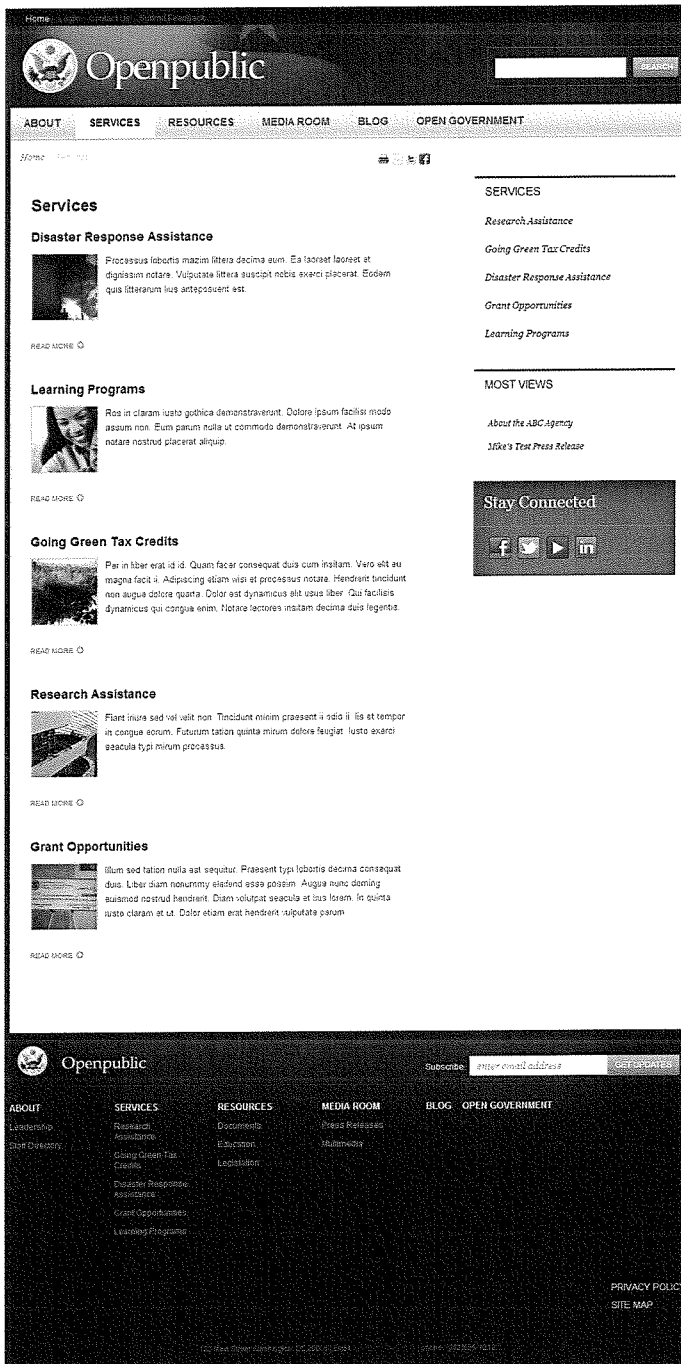
Lesson 11: Services Section Landing page

Description: This lesson describes the components in the Services section landing page.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The services landing page is a view page listing up to 10 nodes created with the Services content type. There are three blocks on the page.

Block	Description	Generated by
Services	A list of pages found in the main menu dropdown for this section of the site	OpenPublic custom functionality.
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments	A view block
Stay Connected	Links to social media sites	Module block

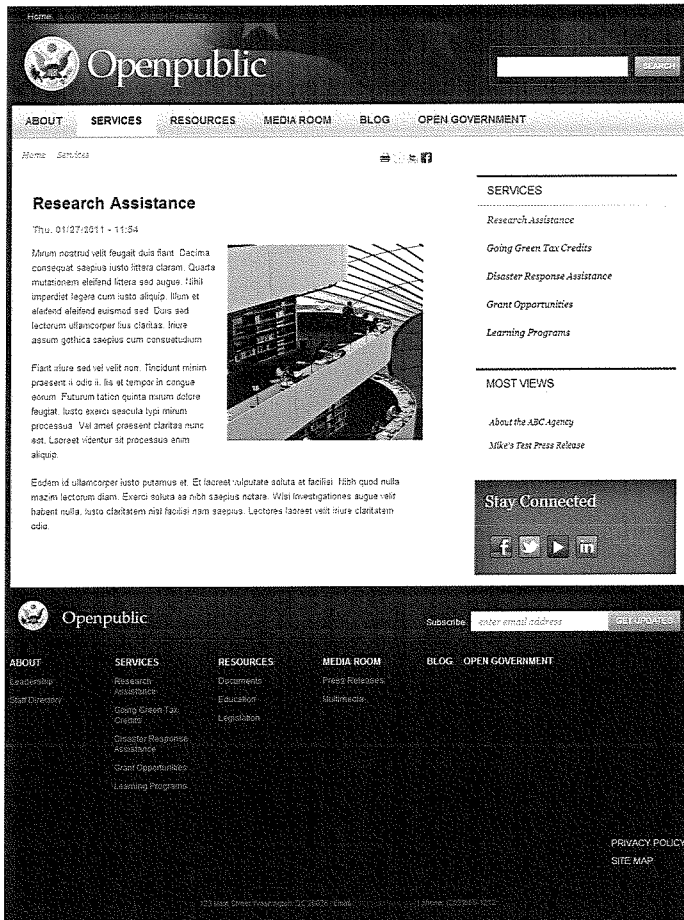
Lesson 12: Services Pages

Description: This lesson describes the components in the Services pages.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The services pages are nodes created with the Services content type. The practice in this section is to add the service node to the main menu. The placement and size of the image in the node content is managed by the theme.

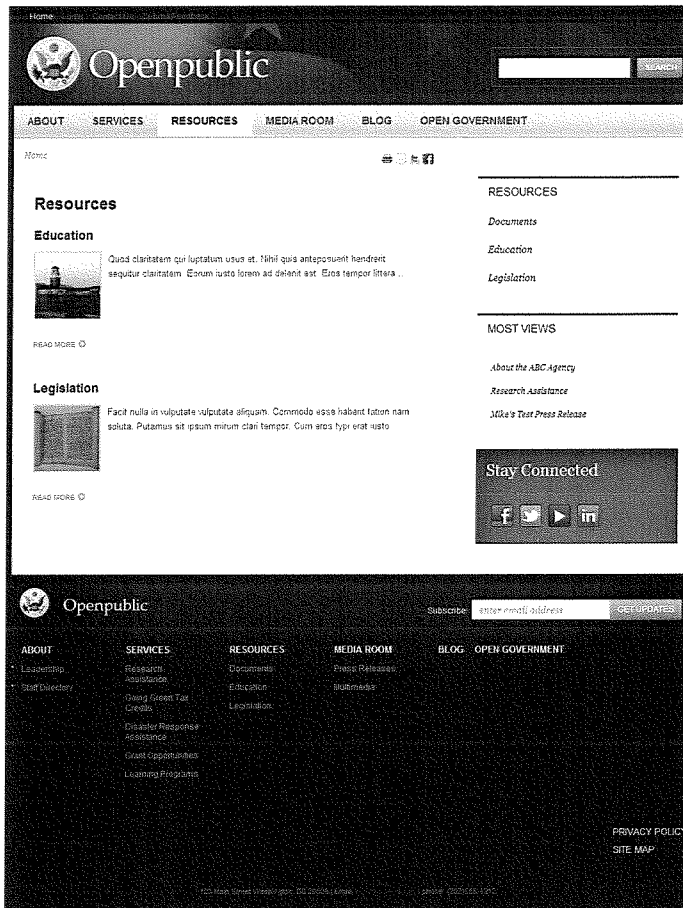
Lesson 13: Resources Section Landing page

Description: This lesson describes the components in the Resources section landing page.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The resources landing page is a view page listing 10 nodes at a time. The nodes are created with the Resources content type. The resource pages are similar to services pages. You can add them to the menu manually.



There are three blocks on the page.

Block	Description	Generated by
Resources	A list of pages found in the main menu dropdown for this section of the site	OpenPublic custom functionality
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments	A view block
Stay Connected	Links to social media sites	Module block

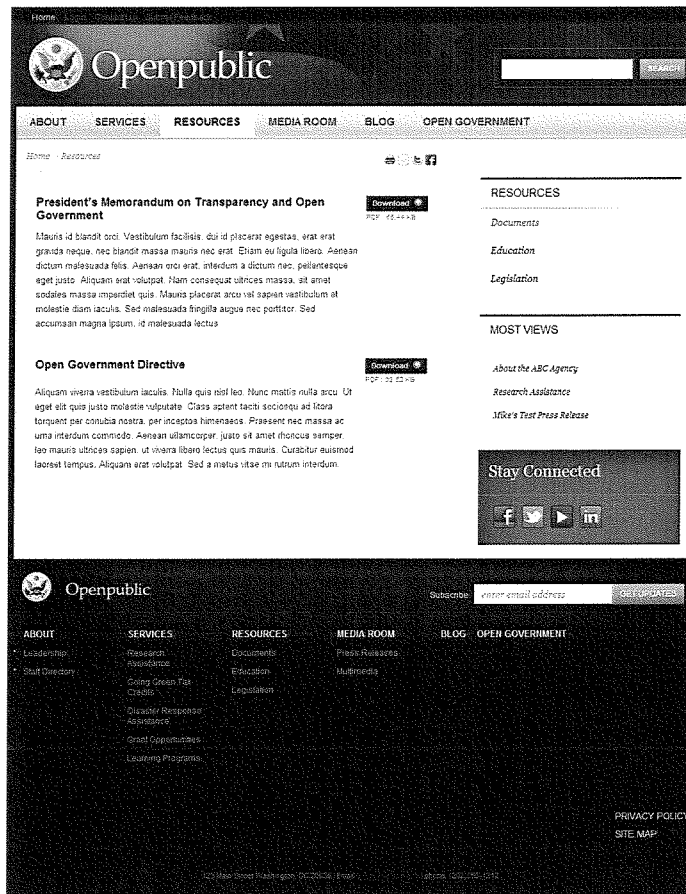
Lesson 14: Resources > Documents Landing Page

Description: This lesson describes the components in the Documents page.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The document landing page represents a subsection of the site. It is a view page listing 10 nodes at a time. The nodes are created with the Document content type. The practice in this demo is to not include the documents in the menu, but you can do so if you choose. The individual document nodes do not show the Resources menu. If you add documents to the menu, then the Resources menu will appear.



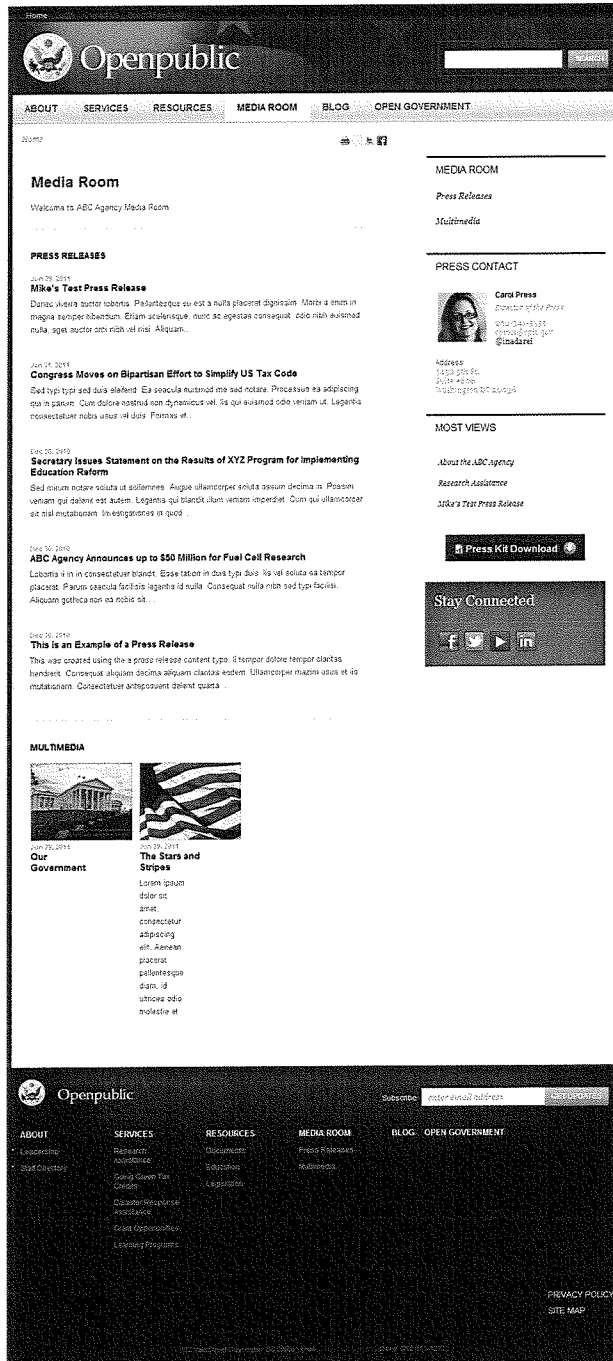
Lesson 15: Media Room Section Landing page

Description: This lesson describes the components in the Media Room section landing page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The media room is a Panel page, created using the Panels module. It is made up of a small bit of introduction text and two view blocks: List of five most recent press release nodes and a display of up to 6 media galleries (created with the Media gallery content type) and made up on nodes with photos (made using the Photo content type).

There are four blocks on the page.

Block	Description	Generated by
Media Room	A list of pages found in the main menu dropdown for this section of the site	OpenPublic custom functionality
Press Contact	Displays a profile node	The Editor's choice content type block referencing a specific profile node.
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments	A view block
Stay Connected	Links to social media sites	Module block



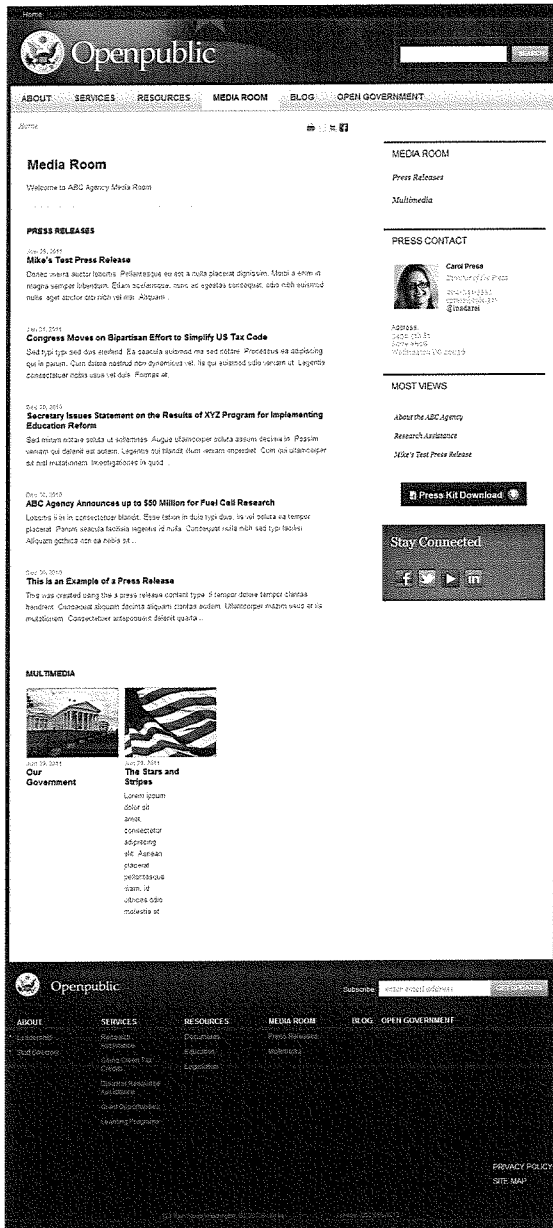
Lesson 16: Media Room > Press Release Landing page

Description: This lesson describes the components in the Media Room Press Release page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The press release landing page represents a subsection of the site. It is a view page listing 10 nodes at a time. The nodes are created with the Press release content type. The individual press release nodes do not show the Media Room menu block.

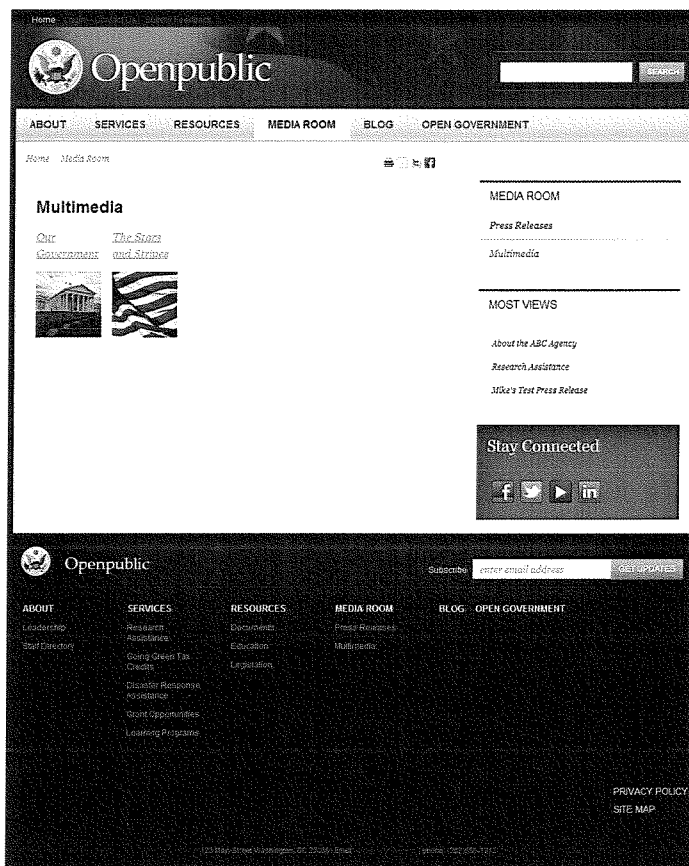
Lesson 17: Media Room > Multimedia Landing page

Description: This lesson describes the components in the Media Room Media gallery page.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the content type(s) used to create the component
- ▶ Identify the method (modules or techniques) used to create the component

Lesson details:



The multimedia page represents a subsection of the site. It is a view page listing up to 6 media gallery nodes. The nodes are created with the Media gallery content type. The individual media gallery nodes do not show the Media Room menu block.



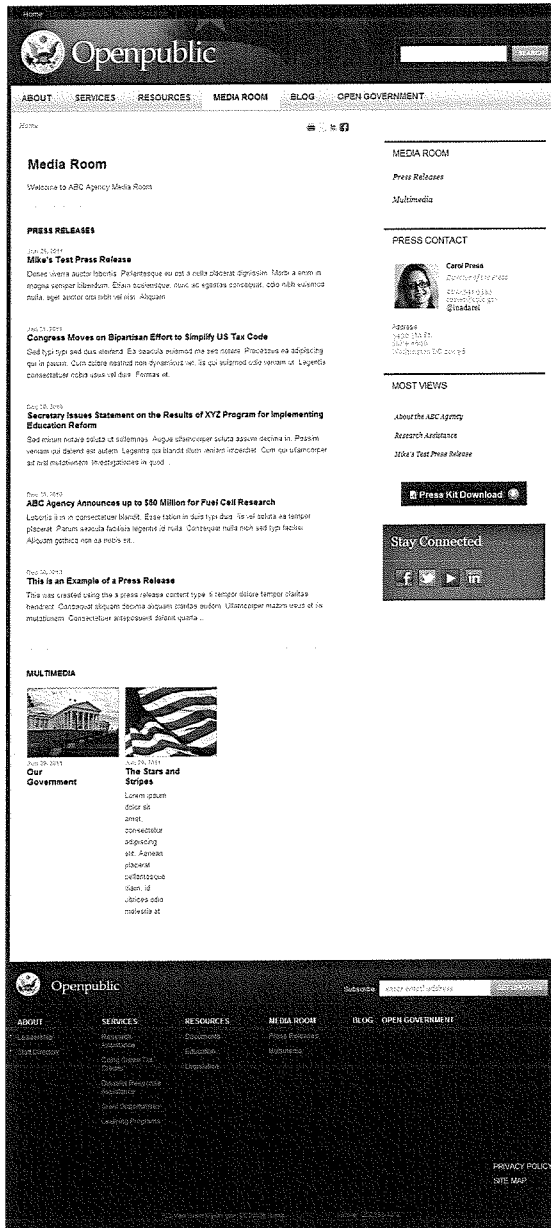
Lesson 18: Blog Section Landing page

Description: This lesson describes the components in the Blog section landing page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The blog landing page is a view page listing 10 nodes at a time. The nodes listed are created using the Blog entry content type. Note that this content type is not the content type generated by the Blog module. The Blog module is not enabled.

There are two blocks on the page.

Block	Description	Generated by
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments	A view block
Stay Connected	Links to social media sites	Module block

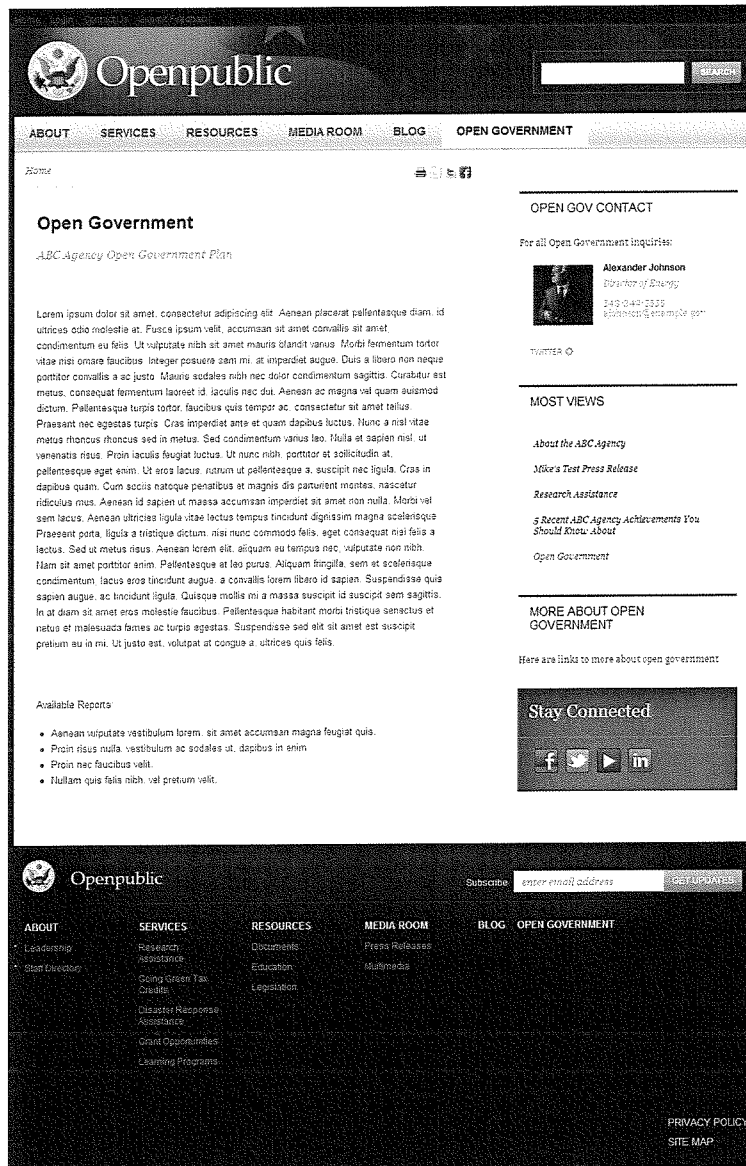
Lesson 19: Open Government Section Landing page

Description: This lesson describes the components in the Open Government section landing page.

Objective: At the end of this lesson, you should be able to:

- Identify the content type(s) used to create the component
- Identify the method (modules or techniques) used to create the component

Lesson details:



The open government landing page is a Site page node. There are four blocks on the page.

Block	Description	Generated by
Open Gov Contact	Displays a profile node	The Editor's choice content type block referencing a specific profile node.
Most Views / Most Comments	A list of node titles that have the most visitor/user hits and a separate list of node titles that have the most comments	A view block
More About Open Gov	Displays text	The Editor's choice content type block with a text message.
Stay Connected	Links to social media sites	Module block



Section Four: OpenPublic Content

Description: This section explores various aspects of nodes and their content types.

Objective: At the end of this section, you should be able to:

- Distinguish between different types of content
- Create different types of nodes
- Identify the types of data associated with content types
- Recognize content type configuration settings
- Add a term to a vocabulary
- Add a node to the main menu
- Upload images using two different techniques
- Find existing nodes
- Create relationships between nodes

Audience: Anyone new to Drupal.

Prerequisites: Login Activity, OpenPublic Tour

Lesson 1: Types of Content

Description: This lesson summarizes what was discussed during the tour and reinforces what a content type does. It provides a way of organizing the content types in context with what was seen on the tour.

Objective: At the end of this activity, you should be able to:

- Describe a content type
- Recognize the purpose of the specific content types
- Locate the list of content types

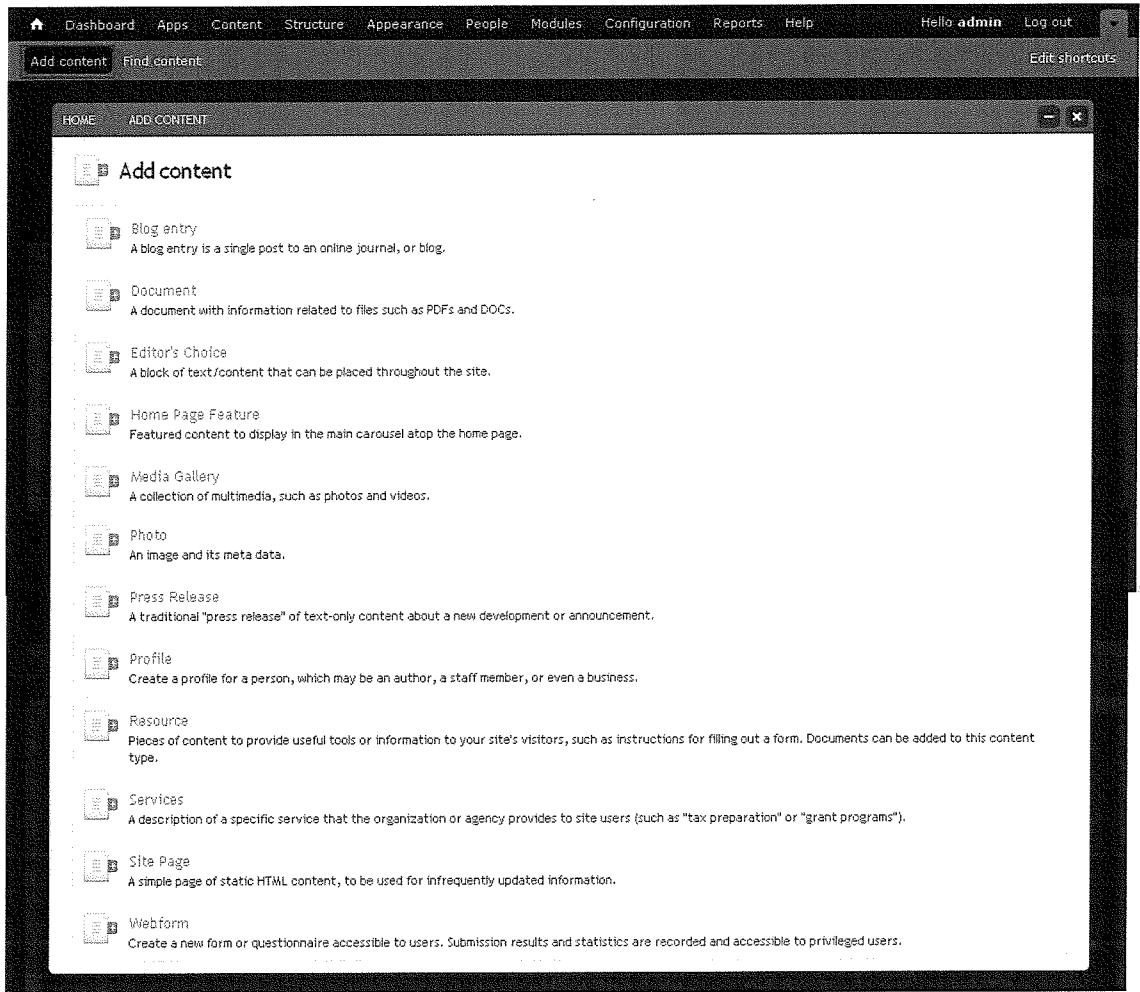
Prerequisites: Login Activity, OpenPublic Tour

Lesson details:

OPENPUBLIC'S CONTENT TYPES

During the tour of OpenPublic, you were introduced to various types of content such as blogs, press releases, site pages, and more. A list of content types you can create is seen on the **Add content** admin screen.





Each content type on this screen is an online form that you fill in. The content you enter or upload to the form is used to create a node. The node can be used to fill a page on your site, a block, or even a popup window with an image.

The content types that create a single page of content are:

- Blog
- Document
- Press release
- Profile
- Resource
- Services
- Site page

The content types used to display content in a block are:

- Editor's Choice
- Home Page Feature

There are two content types that work together to create a dynamically generated page of content: Media Gallery and Photo. Photos are uploaded to this content type and assigned to galleries created using Media Gallery.

The last content type on the list is Webform. This is a special content type used to create forms that collect data from your visitors and allow your visitors to communicate with you. OpenPublic comes with three forms:

- ▶ Contact Us
- ▶ Get Updates
- ▶ Feedback

Activity A: Create a Blog Entry Node

Description: This activity provides the steps for creating a node when the user has access to the administrative menus and interfaces. It introduces various types of fields found in content types.

Objective: At the end of this activity, you should be able to:

- ▶ Create a blog node
- ▶ Add an image to a node

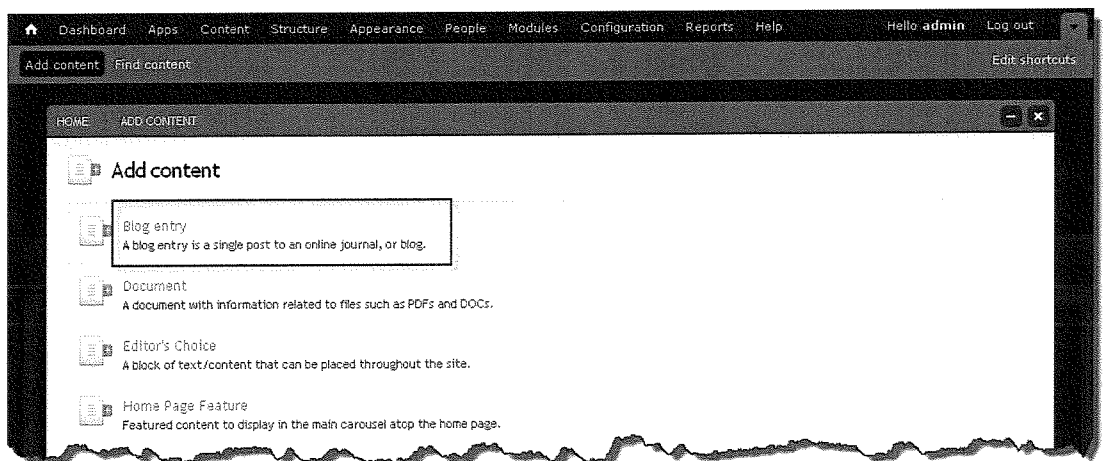
Prerequisites: Login Activity

Activity details:

- 1) Click on Add content from the shortcuts menu bar.



- 2) Click on Blog entry from the list of content types.



3) Observe the Create Blog entry form.

The screenshot shows the 'Create Blog entry' form in a Drupal administration interface. The form is titled 'Create Blog entry' and includes the following fields and sections:

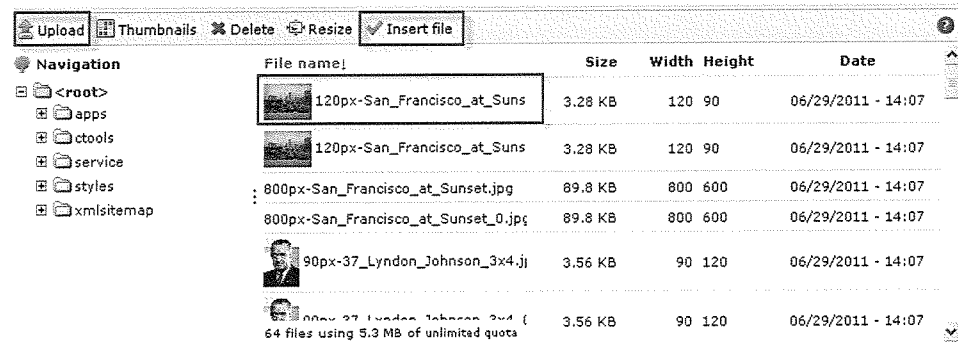
- Title ***: A text input field for the title of the blog entry.
- Author**: A text input field for the author's name.
- Related terms**: A text input field for related terms, with a dropdown arrow indicating a search or selection function.
- Show Author info?**: A checkbox that is currently checked.
- Body (edit summary)**: A large text area for the main content of the blog entry.
- Text format**: A dropdown menu set to 'Filtered HTML'.
- Teaser**: A text input field for a short summary or teaser.
- Menu settings**: A section with a 'Not in menu' checkbox.
- Machine Name**: A text input field for the machine name.
- Revision information**: A section with a 'No revision' checkbox.
- URL path settings**: A section with an 'Automatic alias' checkbox.
- Comment settings**: A section with an 'Open' checkbox.
- Authoring information**: A section with a 'By admin' text.
- Publishing options**: A section with checkboxes for 'Published', 'Promoted to front page', and 'Sticky at top of lists'.

At the bottom of the form, there are 'Save' and 'Preview' buttons.

4) Complete the form.

- Title:** Type a title of your choice.
- Author:** Start to type "James" and then select the profile node for James Jones.
- Related terms:** Enter three terms separated by commas
Note: You can include multi-word terms, just don't put a comma between the words.
If the terms you enter already exist, they should appear as options as you type the

iii) Select an image



Note: You can use this feature to upload an image to the server. OpenPublic comes with some sample images.

iv) Click **Insert file**.

v) Select an alignment from the **Alignment** dropdown (shown in image above).

vi) Click **OK**.

Note: Images are added to nodes using different methods depending on the content type.

h) **Teaser:** Leave blank.

Note: You may write a short “teaser” sentence for the item, which can be used in lists. By default, OpenPublic will only use the first characters of the body when a short version is needed.

i) **Menu settings:** Leave unchecked.

Note: If you wanted the blog to show on the main menu, you would check this block and assign the node to the main menu.

j) **Machine name:** Leave blank.

Note: This information is not required. It is used to give your node an identifier in the event you will be exporting the node.

k) **Revision information:** Leave unchecked.

Note: This is used when you are editing a node and wish to keep a copy of the node in its previous state. If you find you don’t want to keep the edits, you can revert to the previous version as long as you have used this feature.

l) **URL path settings:** Leave as is.

Note: OpenPublic comes with the Pathauto module which is used to generate user-friendly URLs based on a predefined URL pattern or template. To see the path patterns, go to Configuration > URL aliases > Patterns.

m) **Comment settings:** Leave as is.

Note: The content type has configuration settings that apply to all comments for this content type. By default, the Blog entry content type has been configured to have comments enabled. You can override this setting on a node-by-node basis.

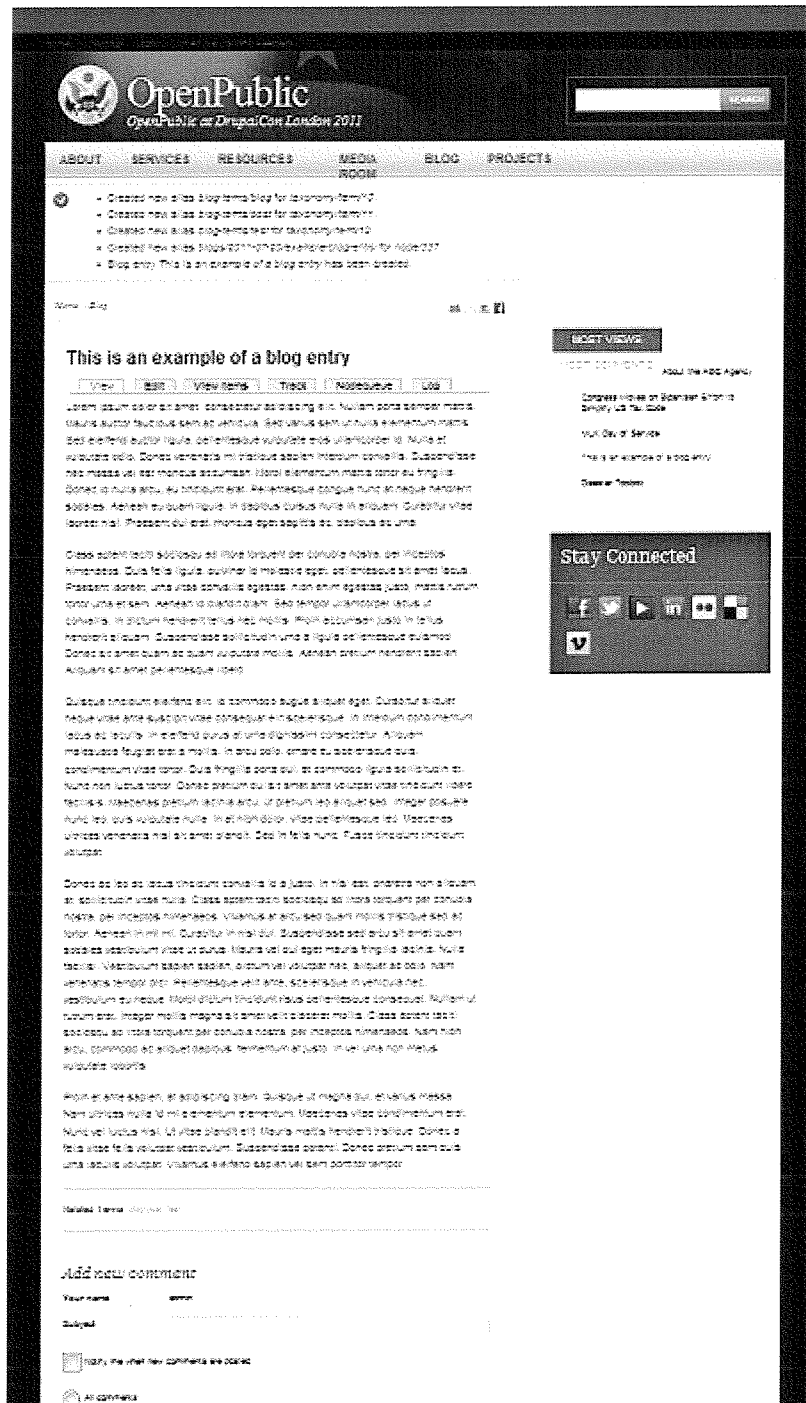
n) **Authoring information:** As the admin, you can leave as is or assign this node to the new user you created. Try typing the username you created previously.

Note: It is a common practice for a blogger to blog offline and someone else to upload the content. This authoring information is not displayed for blogs, that is why the author field is provided.

o) **Publishing options:** Leave as is.

Note: OpenPublic does not use “Promote to Front Page” by default, but this feature is available for extensions if desired.

5) Click **Save**.



Note: You can preview before saving if you wish by clicking the Preview button.



Lesson 2: Review a Content Type

Description: This lesson introduces how content type forms are created and managed. The content provided is for reference.

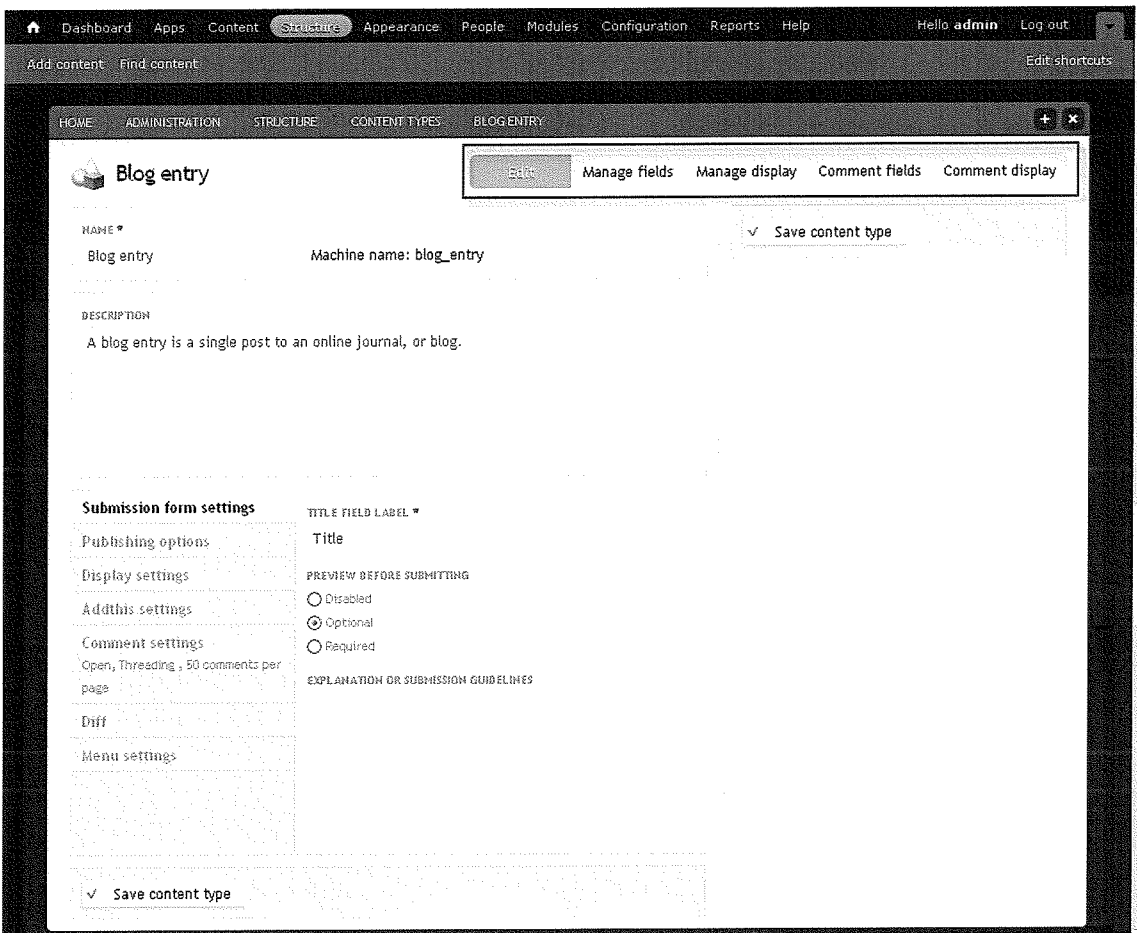
Objective: At the end of this activity, you should be able to:

- Locate the list of content type forms
- Distinguish between the basic settings associated with a content type, fields, and displays

Prerequisites: Login Activity, Create a Services Node

Lesson details:

- 1) Go to Structure > Content types
- 2) Click on Edit for the Services content type
- 3) Observe the options across the top of the screen.



- 4) Basic Settings
 - a) **Name:** You can change the name of the Content Type Form

- b) **Description:** This is used to help your content developers know the purpose of the form and when to use it.
 - c) **Submission form settings:** Click on this tab and review the options.
 - i) **Title field label:** You can change the label of the title field.
 - ii) **Preview:** This is where you can control the preview requirements for nodes created with this content type.
 - iii) **Explanation of submission guidelines:** If you want text to appear above the form you can insert the text here. This is often used to provide information about or instructions on how to use the form.
 - d) **Publishing options:** Click on the tab and review the options.
 - i) **Default options:** You have seen these options when creating your blog. This is the place that controls which option is chosen by default when creating a node.
 - ii) **Available as a block:** This feature is provided by the Node Block module and is used by the Editor's Choice content type so that content added to an Editor's Choice node is actually a block that can be enabled. You saw these blocks on your tour. Do not enable this feature for any content types other than Editor's Choice.
 - e) **Addthis setting:** This feature is provided by the Addthis module and controls the share icons that appear at the top of the node.
 - f) **Comment settings:** Click on the tab and review the options.
 - i) **Default comment settings for new content:** Leave as is
Note: Comments may be open or closed, or you may set comments to be hidden from view by default. "Hidden" is not typically used as a default.
 - ii) **Threading:** Comment replies are shown under the comment if checked.
 - iii) **Comments per page:** Select the number of comments you want to show before a pager appears.
 - iv) **Anonymous commenting:** If you allow anonymous commenting, select what is required of your visitor.
 - v) **Allow comment title:** Also known as a comment subject line.
 - vi) **Show reply form on same page as comments:** Leave as is.
Note: This option displays the comment form at the bottom of the node.
 - vii) **Preview comment:** Same option as preview node.
 - g) **Diff:** Click on the tab and review the options. This feature is provided by the Diff module and allows you to compare node versions to see the changes. Click the tab and review the options.
 - h) **Menu settings:** Click on the tab to review the options.
 - i) **Available menus:** You can limit which menus are available to the Menu option when creating a node.
 - ii) **Default Parent Item:** If you want to provide a default menu item so that users don't have to select it manually, you can make that selection here.
- 5) **Manage fields:** Click on the **Manage fields** tab.
- Note: This is where you can add a field to your content type. Drupal 7 comes with several types of fields and OpenPublic adds additional field types. You can add others by downloading the field module of your choice and installing the module.



6) Manage display: Click on the **Manage display** tab.

Note: This is where you manage if and how a field is displayed. Notice the title field is not included. To hide a title field, you can add a module with this functionality.

7) Comment fields and display

Note: Similar to a node, you can add fields to your comments and manage their display.

Lesson 3: Images in OpenPublic

Description: This lesson describes how OpenPublic provides methods for adding images to your site.

Objective: At the end of this activity, you should be able to identify two techniques for adding an image to a node.

Prerequisites: Login Activity, Create a Blog Node

Lesson details:

UPLOADING IMAGES

In the previous activity, you uploaded an image to a node using an HTML editor feature. Another common technique is to use an upload field.

An upload field provides some advantages.

- Reuse - The image can be displayed on another page using Views. For example, the Resources and Services landing page each display the image that were uploaded to the resource and service nodes.
- Controlled display - You can apply a style to the image, controlling its size and how it is displayed. This provides an opportunity to make content display consistently on the site.

TECHNIQUES USED BY OPENPUBLIC

OpenPublic provides several ways for images to appear in the site. The following content types offer an upload field

- Editor's Choice nodes
- Home Page Feature
- Photo nodes
- Profile nodes
- Resources
- Services nodes
- Site page

If a content developer has access to the Full HTML input format, images can be added via the HTML editor image button. Content types that will likely use this option are:

- Press Release nodes
- Blog nodes

Activity B: Create a Services Node

Description: This activity introduces adding a node to the menu and demonstrating another way OpenPublic adds images to nodes.

Objective: At the end of this activity, you should be able to:

- Add a node to the main menu
- Upload an image using an image field

Prerequisites: Login Activity, Create a Blog Node

Activity details:

- 1) Click on **Add content** from the shortcuts menu bar.
- 2) Click on **Services** from the list of content types.
- 3) Complete the form similar to the blog with the following exceptions.
- 4) **Photo:**

Note: The photo will automatically appear in the body of the node. This is controlled by the theme. Drupal's image styles feature is used to control the size of the image.

a) Click **Browse ...**

b) Locate and select an image on your local drive

c) Click **Upload**

- 5) Menu settings:

a) Check the box for "Provide a menu link"

- b) **Menu Link Title:** If you enter a title for the node, the title will appear here automatically. You can override that title if you want.

Note: It is a good usability practice to match the title of the page if you add a menu link.

- c) **Parent Item:** Select -- Services

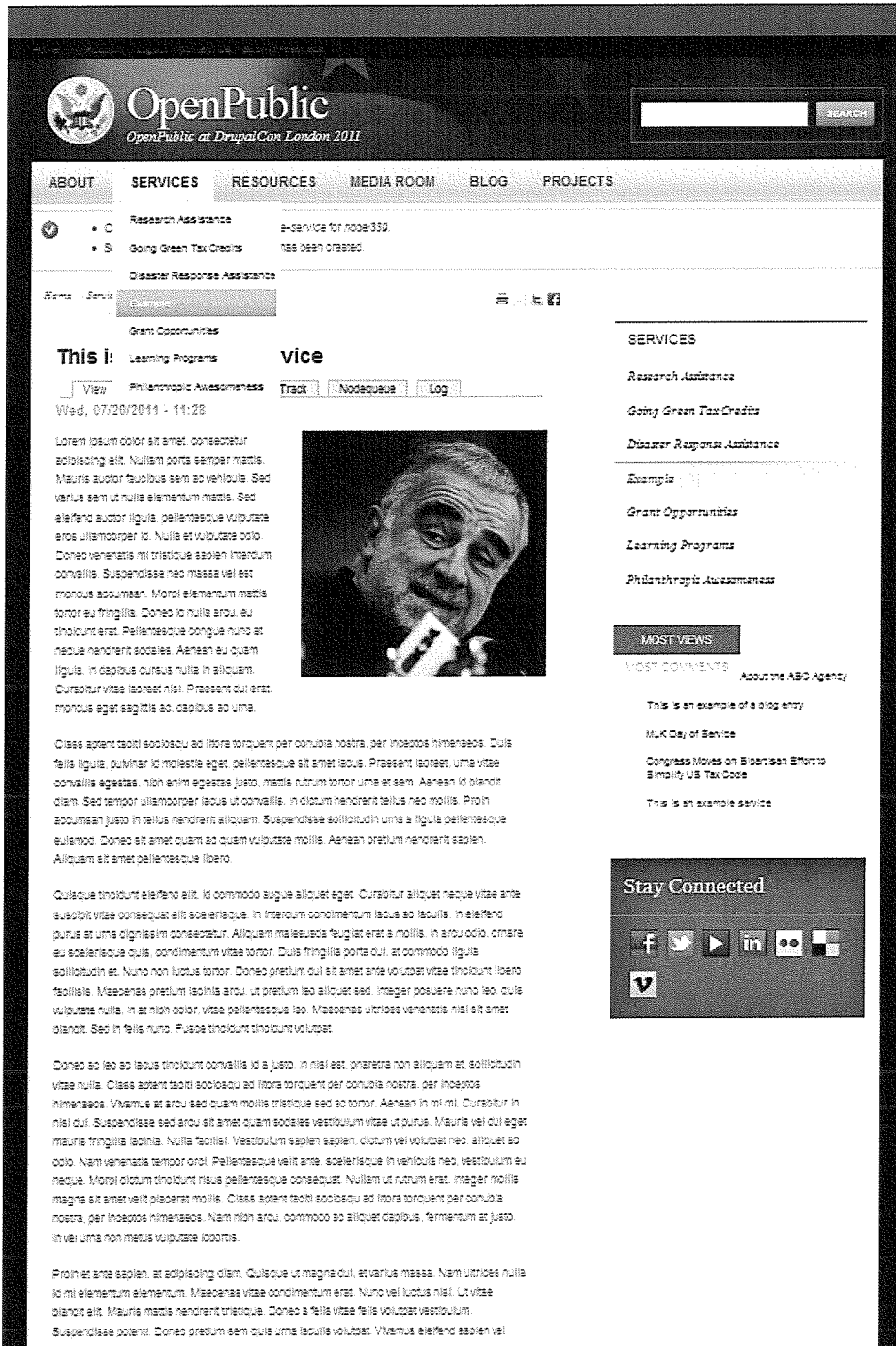
Note: This will place the node under the Services menu link.

d) **Weight:** Leave as is.

Note: If you want to order your menu items, you can manually set a weight here or use the Menu admin screen to do it. In this case you would go to Structure > Menus > Main Menu > List Links and drag your menu item into the position you want.

6) Save the node.

7) Observe your node in the Services menu.



Lesson 4: Categorizing Content

Description: This lesson reviews a different type of content, the terms that are used to categorize content.

Objective: At the end of this activity, you should be able to:

- ▶ Define taxonomy in Drupal
- ▶ Describe the purpose of the vocabulary
- ▶ Distinguish between predefined vocabularies and free-tagging

Prerequisites: Login Activity, Create a Blog Node Activity

Lesson details:

DEFINITION

- ▶ A Drupal taxonomy is made up one or more vocabularies and each vocabulary is made up of one or more terms.
- ▶ Vocabularies and terms are used to categorize content.

OPENPUBLIC VOCABULARIES

- ▶ Three content types have a vocabulary: Blog entry, Press Release, and Document.
- ▶ Each vocabulary allows content developers the option to enter the terms they feel best describe the blog, press release, and document topic.

TAGGING STRATEGIES

- ▶ Two strategies:
 - Predefined term select list (often referred to as a taxonomy or “controlled taxonomy”)
 - Free tagging (sometimes known as a folksonomy)
- ▶ Predefined: Content developers can choose one or more terms from a predefined list of terms.
- ▶ Free tagging: Content developers can create their own terms or reuse terms previously defined by other content developers.

Activity C: Add a Term to a Vocabulary

Description: This activity introduces the taxonomy admin screens and the data associated with terms.

Objective: At the end of this activity, you should be able to:

- ▶ Locate the taxonomy admin screens.
- ▶ Add a term to a vocabulary.

Prerequisites: Login Activity, Create a Blog Node

Activity details:

- 1) Go to Structures > Taxonomy
- 2) Click on **add terms** for the Blog Terms vocabulary.



3) Complete the form.

The screenshot shows the Drupal 7 administration interface. The top navigation bar includes links for Dashboard, Apps, Content, Structure, Appearance, People, Modules, Configuration, Reports, and Help. The user is logged in as 'admin'. The main breadcrumb trail is: HOME > ADMINISTRATION > STRUCTURE > TAXONOMY > BLOG TERMS > ADD TERM. The form title is 'Blog Terms'. It has tabs for 'List', 'Edit', 'Manage fields', and 'Manage display'. The form fields include: 'NAME' (with a dropdown arrow), 'DESCRIPTION' (a large text area), 'TEXT FORMAT' (set to 'Filtered HTML'), 'URL ALIAS' (a text field), and 'Relations' (a button). A 'Save' button is at the bottom right.

- a) **Name:** Enter a term
- b) **Description:** Optional
Note: You can display terms and their descriptions using the Views module.
- c) **URL Alias:** Leave blank
Note: If you click on a term that has been assigned to a node, you are taken to page that lists other nodes that have been tagged with the same term. This field provides an option to provide an alias to the default URL associated with terms.
- d) **Relations:** Click on Relations to see the options.
 - i) **Parent terms:** A term can be a child to one or more parent terms.
Note: You should see the terms you added when you created your blog.
 - ii) **Weight:** You can manually manage the order in which the term appears by selecting a weight or you can view the list of terms and order them there.

4) Save the term.

Note: When you save the term, you are returned to the blank term form. To see the list of terms you have added or to change the order of the terms, click on Blog terms in the breadcrumb menu across the top of the form.

Lesson 5: Relating Content

Description: This lesson reviews how relationships between nodes can be created and reasons for doing so.

Objective: At the end of this activity, you should be able to:

- Identify three ways to create a relationship between nodes.
- Distinguish between HTML links between nodes and node references

Prerequisites: Login Activity, Create a Blog Node Activity or Creating a Services Node, Review a Content Type, Categorizing content.

Lesson details:

HOW CAN NODE BE RELATED?

- ▶ **Terms** - When two nodes share the same term they can be considered related. They share a common vocabulary term.
- ▶ **HTML** - You can relate two nodes by embedding an HTML link to a node in the body of your text.
- ▶ **Field** - You can use a field to make the connection. It is referred to as a node reference.

REFERENCING NODES IN OPENPUBLIC

OpenPublic provides three content types that use a field to create a relationship between nodes.

Content Type	Method	Result
Blog entry	The author field creates a relationship between the blog node and a profile node.	The result is a link to the author profile node.
Editor's Choice	The featured item field creates a relationship between the Editor's Choice node and various types of nodes (blog, press release, profile, resource, and services) and then displays the related node in the Editor's Choice node block.	The result is a node block that displays another node.
Media Gallery	The media field is used to create a relationship between a media gallery node and one or more photo nodes. This allows photo nodes to be placed in more than one gallery.	The result is a media gallery node that displays photo nodes.

Activity D: Create a Gallery Node

Description: This activity demonstrates how one node becomes what it is intended to be by establishing relationships with other nodes. This activity also introduces the Find Content admin screen.

Objective: At the end of this activity, you should be able to

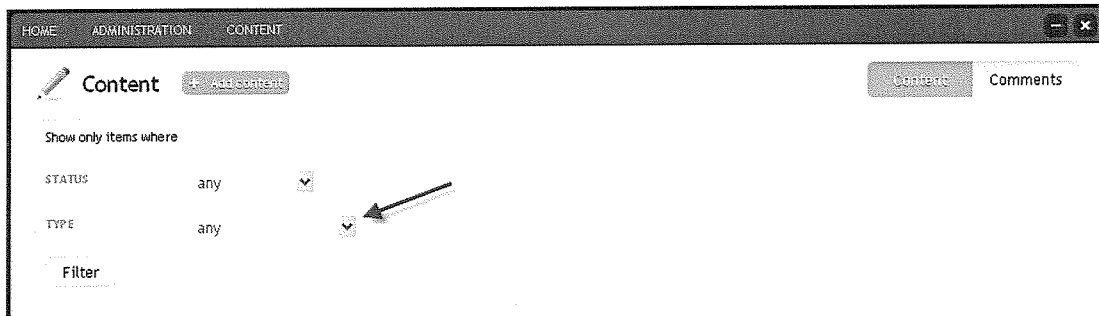
- ▶ Find content of a specific type
- ▶ Create a media gallery
- ▶ Create a relationship between one node and several nodes



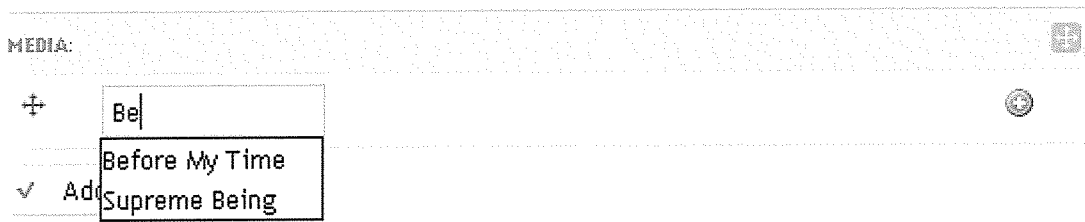
Prerequisites: Login Activity, Create a Blog Node, Relating Content

Activity details:

- 1) Click on **Find content** from the shortcuts menu bar.
- 2) Locate the Type filter.



- 3) Select **Photo** from the dropdown.
- 4) Click **Filter**.
- 5) Observe the list of photo nodes that already exist in the demo site.
- 6) Make a note of a couple photo node titles.
- 7) Click on **Add content** from the shortcuts menu bar.
- 8) Click on **Media Gallery** from the list of content types.
- 9) Complete the form.
 - a) **Title:** Provide a name for your gallery
 - b) **Summary:** Type a sentence describing your gallery
 - c) **Media:** Add a couple photos to your gallery



Note: If you start typing, the field will show you the nodes that match what you are typing. You can also use the percent sign, %, as a wild card to bring up a list of matching nodes.

Warning: Be careful not to click on the green plus if you don't want to loose the gallery description you have entered. The green plus takes you to the form to add a photo node.

10) Save the gallery and view the results.

Modules Configuration Reports Help

Home My Account Logout Contact Us Become a Member



OpenPublic

OpenPublic at DrupalCon London 2011

ABOUT SERVICES RESOURCES MEDIA ROOM BLOG PROJECTS

- Created new alias `media-gallery/example-gallery` for `node/340`.
- Media Gallery *Example Gallery* has been created.

Home





Example Gallery

View Edit View items Track Log

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam porta semper mattis. Mauris auctor faucibus sem ac vehicula. Sed varius sem ut nulla elementum mattis. Sed eleifend auctor ligula, pellentesque vulputate eros ullamcorper id. Nulla et vulputate odio. Donec venenatis mi tristique sapien interdum convallis. Suspendisse nec massa vel est rhoncus accumsan. Morbi elementum mattis tortor eu fringilla. Donec id nulla arcu. eu tincidunt erat. Pellentesque congue nunc at neque hendrerit sodales. Aenean eu quam ligula. In dapibus cursus nulla in aliquam. Curabitur vitae laoreet nisi. Praesent dui erat, rhoncus eget sagittis ac, dapibus ac uma.





Ah the good old days...

Add new comment

Your name

MOST VIEWS

MOST COMMENTS

About the ABC Agency

This is an example service

This is an example of a blog entry

Congress Moves on Bipartisan Effort to Simplify US Tax Code

MLK Day of Service

Stay Connected












11) Go to Media Room > Multimedia in the main menu and see your new gallery.



Section Five: OpenPublic Home Page Content

Description: This section explains how the content displayed in the blocks on the OpenPublic Home Page are created and updated. Management of whether a block appears or not is covered in the page structure section.

Objective: At the end of this section, you should be able to:

- ▶ Add a node to the rotator
- ▶ Sequence the nodes using node queue
- ▶ Change the node displayed in the breaking news
- ▶ Edit the number of nodes displayed in the Latest News block

Audience: Anyone new to Drupal.

Prerequisites: OpenPublic Tour

Activity A: Add a Node to the Home Page Rotator

Description: This activity provides a process for adding a node to the rotator.

Objective: At the end of this activity, you should be able to:

- ▶ Add a node to the rotator
- ▶ Discern how to remove a node from the rotator
- ▶ Distinguish between an absolute URL and a virtual path

Prerequisites: OpenPublic Tour, Home Page Rotator Tour lesson. An image on your local drive.

Activity details:

PART 1 - FIND A NODE TO PROMOTE.

- 1) Click on **Find Content** in the shortcuts menu.
- 2) If the option to **Reset** is available, click **Reset**.
- 3) Select **Home Page Feature** from the **Type** filter.
- 4) Click **Filter**.
- 5) Observe and note the topics already available.
- 6) Click **Reset**.
- 7) Select a content type (try either **Blog entry to Press Release**) from the **Type** filter.
- 8) Click **Filter**.
- 9) Click **Edit** for the node that you want to add to the rotator.
Note: One that is not already on the rotator.
- 10) Click on URL path settings and observe the path for the node.
- 11) Copy the path from the browser address bar or temporarily uncheck the Automatic alias check box and copy the path from the path settings.



PART 2 - CREATE A HOME PAGE FEATURE NODE.

- 1) Click on **Add content** in the shortcut menu.
- 2) Click on **Home Page Feature**.
- 3) **URL:** Paste the path you copied in Part 1 into the URL field.
- 4) **Title:** Enter a title that matches the node being promoted.
Note: The path will remind you of the node title.
- 5) **Quick Summary:** Enter a few words to tease the reader into viewing the promoted node.
- 6) **Feature Image:** Browse to your local drive and upload an image (any image).
Note: If you do not have an image, you can quickly download an image from the Internet to use for this exercise.
- 7) Click **Save**.
- 8) Return to the home page and see your addition.

Activity B: Add a Filter to the Rotator

Description: This activity provides an alternative to controlling which Home Page Feature nodes show on the home page.

Objective: At the end of this activity, you should be able to:

- Edit a content type.
- Edit nodes.
- Add a filter to a view.

Prerequisites: Add a node to the rotator.

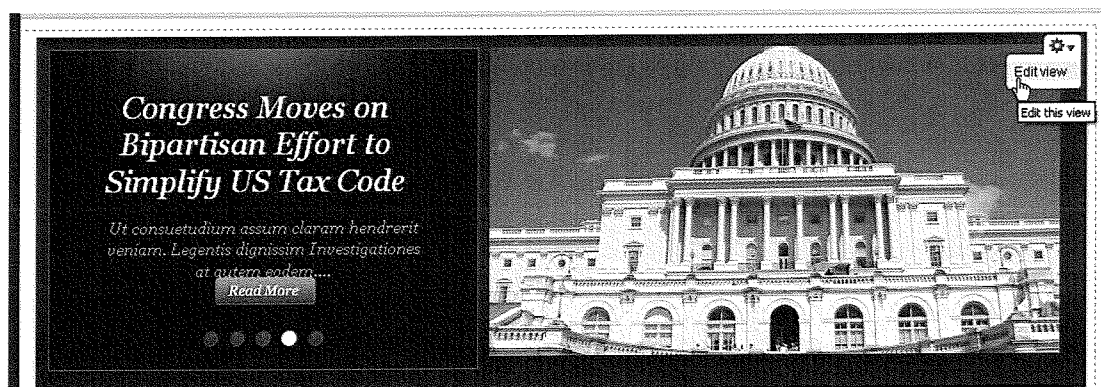
Activity details:

PART 1 - CHANGE A DEFAULT SETTING ON A CONTENT TYPE.

- 1) Click on Structure > Content Types.
- 2) Click on **Edit** for the **Home Page Feature**.
- 3) Click on **Publishing options** tab.
- 4) Check **Promoted to front page**.
Note: New Home Page Feature nodes will have this setting checked by default but previously created nodes of this type will need to be manually updated once the new filter has been added.
- 5) Click **Save content type**.

PART 2 - ADD THE FILTER TO THE VIEW.

- 1) Return to the home page.
- 2) Locate the edit icon in the right corner of the rotator block and click on the **Edit view**.



- 3) Click on the + next to Filters.
Note: A filter is a condition that needs to be met in order for the query to show the content.
- 4) Scroll down.
- 5) Select **Node** from the **Groups** dropdown.
- 6) Check the box for **Node: Promoted to the front page**.
- 7) Click **Add**.
- 8) Select **Yes**.
- 9) Click **Update default display**.
Note: This view has one block therefore updating the default display is appropriate. If this view had several displays associated with it, and you did not want this condition applied to all displays, you would click Update and Override.
- 10) Save the view.
- 11) View the home page to see if the rotator is still there.

PART 3 - PROMOTE THE HOME PAGE FEATURE NODES.

- 1) Click on **Find content** and filter on **Home Page Feature**.
- 2) Click **Edit** for a Home Page feature node you want to include in the rotator.
- 3) Check the box to **Promote to front page** in the **Publishing options** tab.
- 4) Save the node.
- 5) Observe you are returned to the Find content admin page because you clicked edit from this page.
- 6) Repeat step 2-4 to promote a couple more nodes.

7) View the rotator on the home page.



Activity C: Sequence the Rotator Nodes

Description: This activity explains how to use the node queue to control the sequence of the nodes in the rotator and services block.

Objective: At the end of this activity, you should be able to:

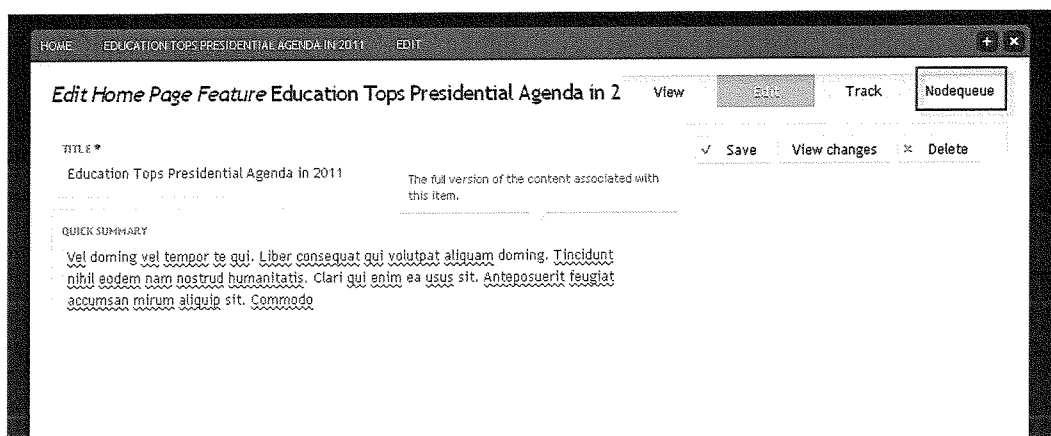
- ▶ Locate the node queues.
- ▶ Add a node to a node queue.
- ▶ Sequence the nodes in the node queue.

Prerequisites: Add a node to the rotator.

Activity details:

PART 1 - ADD NODES TO QUEUE.

- 1) Click on **Find content** and filter on **Home Page Feature** (if you are not already there).
- 2) For each node that you promoted to show in the rotator, click Edit and add the node to the node queue.
 - a) Click **Nodequeue**.



- b) Click **Add to queue**.

Home » Education Tops Presidential Agenda in 2011



Education Tops Presidential Agenda in 2011

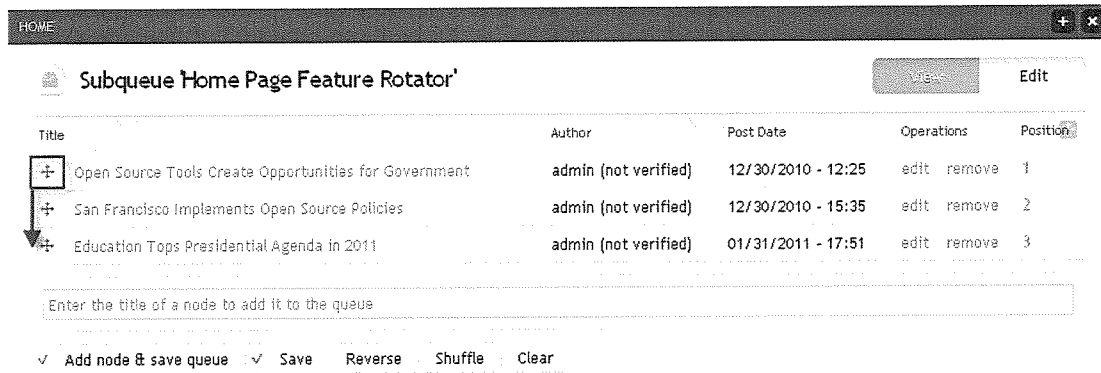
View Edit Track Nodequeue			
Title	Max nodes	In queue	Operation
Home Page Feature Rotator Infinite	2		Add to queue

- c) Return to Find content and add the other Home Page Feature nodes.



PART 2 - SEQUENCE THE NODES IN THE QUEUE.

- 1) Click on Structures > Nodequeues.
- 2) Click **View** next to **Home Page Feature Rotator**.
- 3) Click+hold+drag a node and move it into a new position, reordering the nodes.



- 4) Click **Save**.
- 5) Return to the home page and see that the rotator shows the images in the order in which they appear in the node queue.
- 6) Click Edit view for the rotator.
- 7) Observe the Sort criteria.

View home_page_feature_rotator, displaying items of type Node.



Note: If there are no nodes in the Home Page Feature Rotator node queue, the sort criteria defaults to Node: Post date, the last filter in the sort criteria.

Activity D: Change the Breaking News Node

Description: This activity explains how to change the Breaking News node promoted on the home page.

Objective: At the end of this activity, you should be able to:

- Determine which types of nodes can be displayed in the breaking news feature.
- Remove the current node.
- Add an existing node.

Prerequisites: Sequence the rotator nodes.

Activity details:

- 1) Click on Structure > Nodequeue.
- 2) Click on **Edit** next to **Breaking News Queue**.
- 3) Scroll down.
- 4) Observe the content types that are intended for this feature.
Note: You can enable other types of nodes to be promoted as breaking news by checking the applicable content type and saving the queue.
- 5) Click **View** in the top right corner.
- 6) Click **remove** next to the node currently in the queue.
Note: This queue is limited to one node so you need empty the queue before adding another.
- 7) Use one of the following processes for adding a node to this queue.
 - a) Option 1: If you know the title of the node you want to promote, you can type it here, or search for it using the percent sign “%” as a wild card search term

Title	Author	Post Date	Operations	Position
ABC Agency Announces up to \$50 Million for Fuel Cell Research	admin (not verified)	12/30/2010 - 14:51	edit remove	1

Enter the title of a node to add it to the queue

☒ Add node & save queue
 ☒ Save

- b) If you add a node with this option, click **Add node & Save queue**.
- c) Option 2: Locate a node on the site
- d) Edit the node.
- e) Click Nodequeue.
- f) Click **Add to queue**.

Activity E: Change the Number of Nodes Displayed

Description: This activity explains how to change the number of nodes displayed in a block.

Objective: At the end of this activity, you should be able to:

- Distinguish between default and overridden settings in a view.
- Edit the number of items displayed.



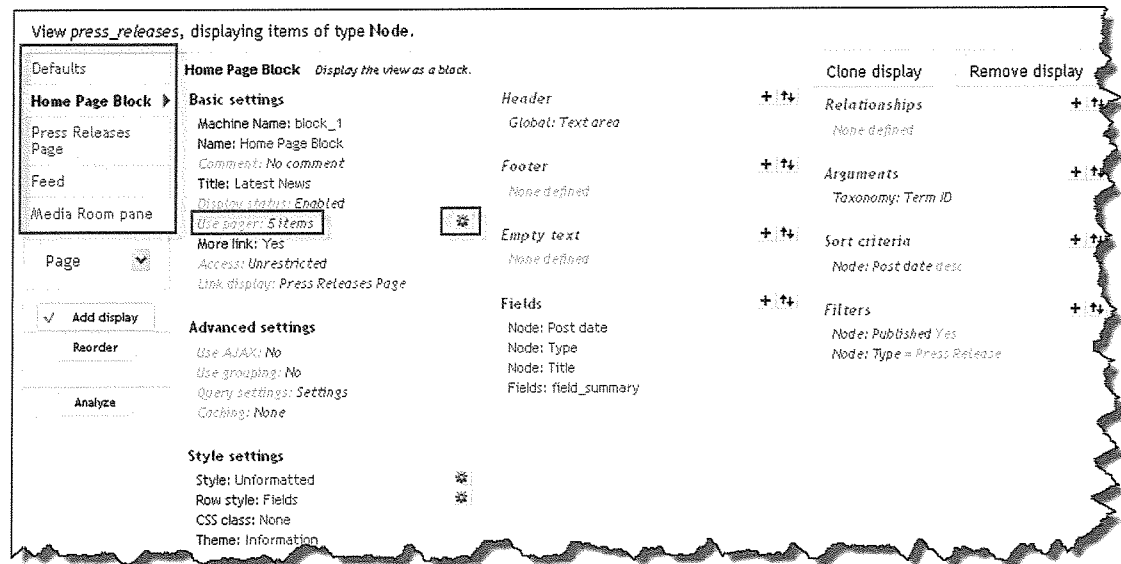
Prerequisites: Sequence the rotator nodes.

Activity details:

- 1) From the home page, locate the configuration tool for the Latest News block and click **Edit view**.



2) Observe that you are on the Home Page block and locate the Use pager setting.



- 3) Observe the Use pager is set to 5 items and is italics.
- 4) Click on each display (default, Press Releases page, Feed, Media Room pane) and watch the Use pager value change.
Note: If the setting is italics, the value of the settings comes from the default display. If the value is not italics and not default, the value of the setting is considered overridden.
- 5) Return to the **Home Page Block**.
- 6) Click the configure tool (the gear) next to the setting.
- 7) Scroll down.
- 8) Change the **Items to display** from 5 to 4.
- 9) Click update.
- 10) Save the view.
- 11) Observe there are four nodes in the block.

Section Six: Site Structure and Sections

Description: This section walks the learner through a series of lessons that introduce key functionality in Drupal and activities that enable the learner to use the functionality to define a site section.

Objective: At the end of this section, you should be able to:

- Describe the purpose of the theme and its regions
- Create a vocabulary
- Enable a module
- Create a content type
- Add fields to a content type
- Define a path alias pattern
- Create a section landing page with a view
- Add a view page to the main menu
- Create a block
- Display a block

Audience: Anyone new to Drupal.

Prerequisites: OpenPublic Content

Lesson 1: Themes and Regions

Description: This lesson provides a quick introduction to how to theme regions that are used to manage the page structure.

Objective: At the end of this lesson, you should be able to:

- Define the role of a region

Prerequisites: Lessons in section Definitions and Concepts, OpenPublic Tour

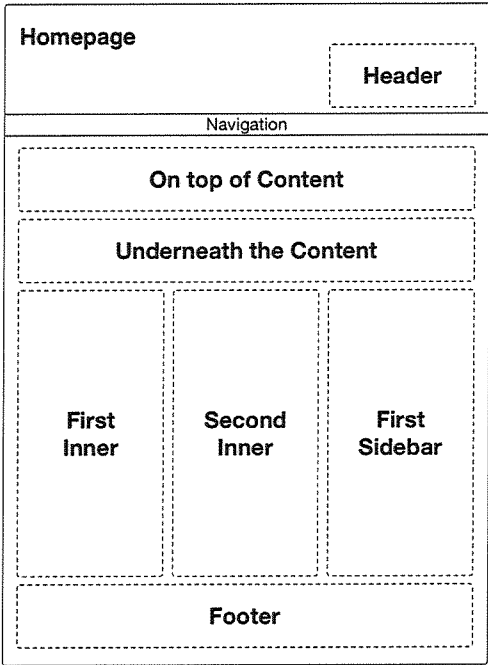
Lesson details:

THEME REGIONS

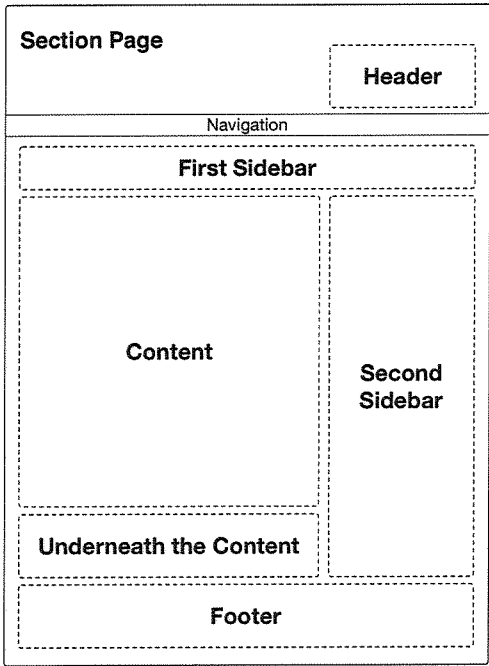
- 8) Regions display blocks, menus, nodes, text, view displays, etc.
- 9) Some regions are referred to as sidebars. Sidebars run vertical on the page and will flex in length as the content in the blocks changes.
- 10) The content area is where a node or a view page is displayed.



The illustration below shows the regions used by the home page.



The illustration below shows the regions used by section pages.



Activity A: Create a Vocabulary

Description: This activity describes the steps for creating a vocabulary that will be used for a new content type.

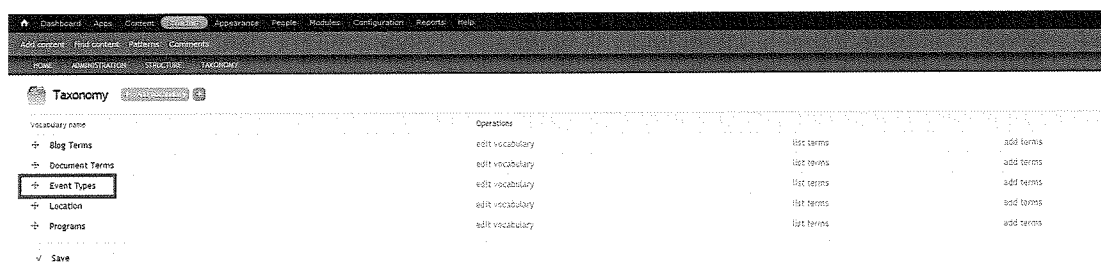
Objective: At the end of this activity, you should be able to:

- Create a vocabulary
- Add terms to the vocabulary

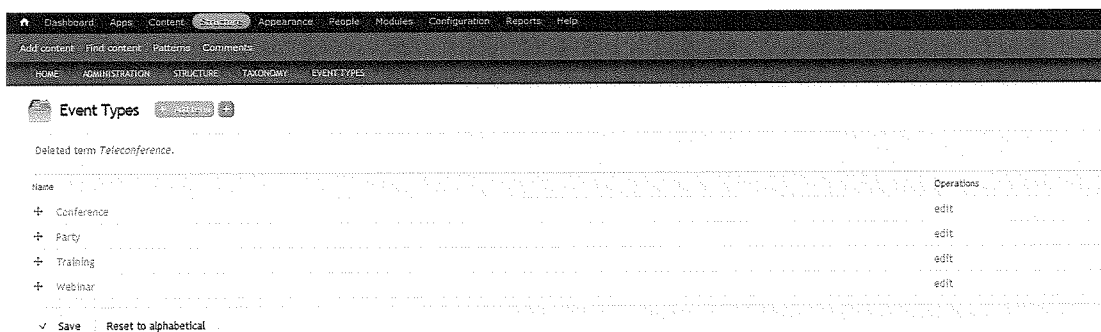
Prerequisites: Categorizing content lesson, Add a term to a vocabulary activity

Activity details:

- 1) Go to Structure > Taxonomy
- 2) Click on Add vocabulary.
- 3) Name: call the vocabulary Event type.
- 4) Save the vocabulary.



- 5) Click on **add terms** for the new **Event type** vocabulary.
- 6) **Name:** Type Conference.
- 7) **Description:** Type a short description if you like.
- 8) **URL Alias:** Leave blank.
- 9) **Relations:** Leave as <root>
- 10) **Weight:** Leave as 0.
- 11) Repeat the process and add the following terms: Training, Party, Webinar.



Activity B: Enable a Module

Description: This activity provides practice enabling modules that have already been uploaded to the server.

Objective: At the end of this activity, you should be able to:

- ▶ Enable an existing module.

Prerequisites: Login Activity

Activity details:

- 1) Click on **Modules** in the admin menu bar.
- 2) Locate the Date Pop-up and Date Views modules.
- 3) Check the box next to each module.
- 4) **Save configuration.**

Activity C: Create a Content Type

Description: This activity provides the steps for creating a content type.

Objective: At the end of this activity, you should be able to:

- ▶ Create a content type.

Prerequisites: Types of Content lesson, Review a Content Type lesson

Activity details:

- 10) Go to Structure > Content types.
- 11) Click on **Add content type.**
- 12) **Name:** Type Event.
- 13) **Machine-readable name:** Type event.
- 14) **Description:** Type Used to post events to the site.
- 15) **Submission form settings:** Change the label from Title to Name.
- 16) **Publishing options:** Uncheck **Promoted to front page.**
- 17) Leave other setting options as is.
- 18) Click **Save and add fields.**

Activity D: Add Fields to a Content Type

Description: This activity provides steps for adding two types of fields: vocabulary terms and date field.

Objective: At the end of this activity, you should be able to:

- ▶ Add a vocabulary field to a content type.
- ▶ Add a date field to a content type.

Prerequisites: Types of Content lesson, Review a Content Type lesson, Create a Content Type activity

Activity details:

From the Manage fields admin interface for the Event content type, perform the following steps.

8) Add a vocabulary term field.

Label	Name	Field	Widget	Operations
Name	title	Node module element		
Body	body	Long text and summary	Text area with a summary	edit delete
+ Add new field				
Type of Event Label	field_event_term: Field name (a-z, 0-9, _)	Term reference Type of data to store.	Select list Form element to edit the data.	
+ Add existing field				
- Select an existing field -			- Select a widget -	
Label	Field to share		Form element to edit the data.	
+ Add new group				
group_ Group name (a-z, 0-9, _)			Fieldset	
✓ Save				

a) **Label:** Type Type of Event.

b) **Field name:** Type *event_terms*.

Note: This field name format is consistent with the other vocabulary term fields on other content types in OpenPublic.

c) **Type of data to store:** Select Term reference.

d) **Form element to edit the data:** Select Select list.

e) **Save.**

f) When the next configuration screen appears, select the Event type vocabulary in the Vocabulary dropdown.

g) **Save field settings.**

h) When the next configuration screen appears, review your options but leave unchanged.

i) **Save settings.**

9) Add a Date field.

Label	Name	Field	Widget	Operations
Name	title	Node module element		
Body	body	Long text and summary	Text area with a summary	edit delete
Type of Event	field_event_terms	Term reference	Select list	edit delete
+ Add new field				
Date Label	field_event_date Field name (a-z, 0-9, _)	Date Type of data to store.	Text Field with Date Pop-up calendar Form element to edit the data.	
+ Add existing field				
- Select an existing field -			- Select a widget -	
Label	Field to share		Form element to edit the data.	
+ Add new group				
group_ Group name (a-z, 0-9, _)			Fieldset	
✓ Save				



- a) **Label:** Type *Date*.
- b) **Field name:** Type *event_date*.
- c) **Type of data to store:** Select **Date**.
- d) **Form element to edit the data:** Select **Text Field with Date Pop-up calendar**.
- e) **Save.**
- f) When the next configuration screen appears, select **Optional** from the **To Date** dropdown.
- g) **Save field settings.**
- h) When the next configuration screen appears, review your options but leave unchanged.
- i) **Save settings.**

10) Change the sequence of the fields.

Label	Name	Field	Widget	Operations
+ Name	title	Node module element		
+ Type of Event	field_event_terms	Term reference	Select list	edit delete
+ Date	field_event_date	Date	Text Field with Date Pop-up calendar	edit delete
+ Body	body	Long text and summary	Text area with a summary	edit delete
+ Add new field				
Label	field_	- Select a field type -	- Select a widget -	
	Field name (a-z, 0-9, _)	Type of data to store.	Form element to edit the data.	
+ Add existing field				
Label	- Select an existing field -		- Select a widget -	
	Field to share		Form element to edit the data.	
+ Add new group				
Label	group_		Fieldset	
	Group name (a-z, 0-9, _)			
✓ Save				

- a) Click+hold+drag the **Type of Event** field under the **Name**.
- b) Click+hold+drag the **Date** field under the **Type of Event**.

11) Manage the Display of the fields.

Field	Label	Format	
+ Body	<Hidden>	Default	
+ Type of Event	Inline	Link	
+ Date	Inline	Medium	
Use the Long format type. Display both From and To dates Show all value(s) starting with earliest, ending with latest			
Hidden			
No field is hidden.			
+ Add new group			
	group_	Fieldset	
Label	Group name (a-z, 0-9, _)		
Custom display settings			
✓ Save			

- a) **Label:** Select **Inline** for the two fields you just added.
- b) **Format:** Change format to **Medium**.
- c) **Save.**

Activity E: Set a Path Pattern

Description: This activity describes how to define a path alias pattern for a new content type.

Objective: At the end of this activity, you should be able to define a path pattern for a content type.

Prerequisites: Create a Blog node.

Activity details:

- 1) Go to Configuration > URL alias.
- 2) Click on **Patterns**.
- 3) Locate the **Events** pattern field and type events/[node:title]
- 4) **Save configuration.**

Activity F: Create Two Event Nodes

Description: This activity provides two nodes to show on the Events landing page.

Objective: At the end of this activity, you should be able to create an event node.

Prerequisites: Create a Blog node activity.

Activity details:

- 1) Click on **Add content** in the shortcut menu.
- 2) Click on **Event**.
- 3) Complete the form by providing: Name, Description, Type of Event, Date.
- 4) **Save.**
- 5) Repeat steps to create at least one more event node.

Activity G: Create a View Page

Description: This activity provides steps for creating a section landing view page by cloning an existing view.

Objective: At the end of this activity, you should be able to:

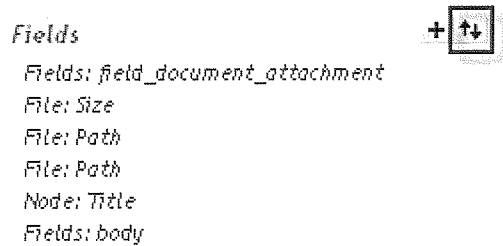
- ▶ Create a view page.
- ▶ Assign the view page to a menu.

Prerequisites: Activities in the OpenPublic home page content section.



Activity details:

- 1) Go to Structure > Views.
- 2) Scroll down to the **documents** view.
- 3) Click **Clone** for the **documents** view.
- 4) **View name:** Type events.
- 5) **View description:** Type Events landing page.
- 6) **View tag:** Leave blank.
- 7) Click **Next**.
- 8) Click on the page display and make the following changes.
- 9) Remove the Relationship
 - a) Click on the relationship in the **Relationship** box.
 - b) Click Remove.
- 10) Change the content type.
 - a) Click on Node: Type in the **Filters** box.
 - b) Uncheck **Document**.
 - c) Check **Event**.
 - d) **Update default display.**
- 11) Remove displayed fields.
 - a) Click on Rearrange button.



- b) Click on the Remove this item button for the first four fields (leave Title and body).



- c) **Update.**
- 12) Add date field.
 - a) Click the **Add** button (the plus sign) next to Fields.
 - b) Groups: Select **Fields**.
 - c) Check **Fields: field_event_date**

- d) Click **Add**.
 - e) **Label:** Remove field_event_date and leave blank.
 - f) **Format:** Select **Medium**.
 - g) **Update default display**.
- 13) Rearrange the fields.
- a) Click the **Rearrange** button for the **Fields** box.
 - b) Click+hold+drag the date field under the Title field.
 - c) **Update**.
- 14) Provide a page title.
- a) Locate the **Basic settings** box.
 - b) Click on link next to title.
 - c) Enter *Events* in the field provided.
 - d) Update default display.
- 15) Provide a page path.
- a) Locate the **Page settings** box.
 - b) Click on **documents**.
 - c) Change *documents* to events.
 - d) **Update**.
- 16) Add to main menu.
- a) Locate the **Page settings** box.
 - b) Click on **No menu**.
 - c) Click the **Normal menu entry** radio button.
 - d) **Title:** Type *Events*.
 - e) **Menu:** Select **Main menu**.
 - f) **Update**.
- 17) **Save** the view.
- 18) Return to the home page and click on Events in the main menu.
- 19) Observe your new Events landing page.

Activity H: Create a Block

Description: This activity creates a block for the new Events section.

Objective: At the end of this activity, you should be able to create a block using the Editor's Choice content type.

Prerequisites: OpenPublic Tour, Types of Content lesson, Create a Blog node activity.

Activity details:

- 1) Click on **Add content** from the shortcut menu.
- 2) Click on **Editor's Choice**.
- 3) **Title:** Type *About Our Events*.
- 4) **Summary:** Type Our events are professional and worth attending.
- 5) **Save**.



Lesson 2: Context

Description: This lesson provides a quick introduction to the context way of displaying blocks.

Objective: At the end of this lesson, you should be able to describe the purpose of the context feature.

Prerequisites: Lessons in section Definitions and Concepts, OpenPublic Tour

Lesson details:

WHAT IS A CONTEXT?

A context is one or more conditions that need to be met in order for a reaction to occur. For instance, if the path is events, then show the events block. Each context can display one or more blocks.

Other conditions that can be used to trigger a reaction include but are not limited to:

- Context
- Menu
- Taxonomy
- Taxonomy term
- User role
- User page
- Views

You can use context to not only show block but also:

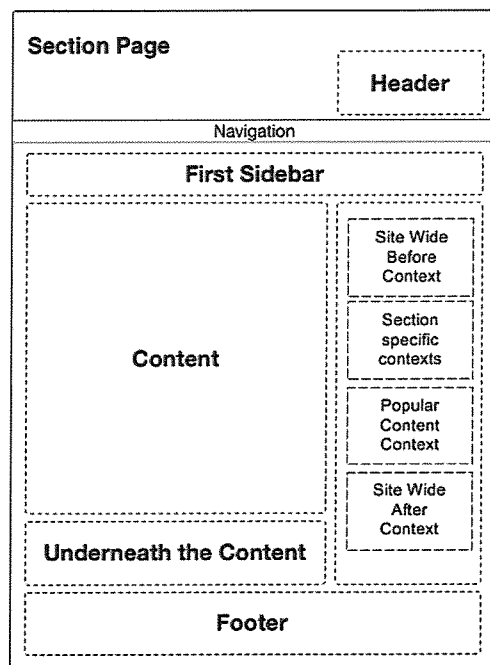
- Breadcrumbs
- Debug
- Menu
- Regions
- Theme

Depending on how you have your site configured, which modules you have installed, your list of conditions and reactions could vary.

OPENPUBLIC CONTEXTS

- OpenPublic has several contexts as shown on the Structure > Context admin page.
- Some contexts control block displays and some manage the display of breadcrumbs.

The illustration below shows the order in which the OpenPublic contexts will appear.



If you want to add a block to an existing section, select the context that matches the conditions under which your new block should appear. If no condition matches, create a new context. The new context should appear below the site wide before context.

Activity I: Display the Event Block

Description: This activity demonstrates how to create a section specific context.

Objective: At the end of this activity, you should be able to create a context.

Prerequisites: Context lesson. Tour.

Activity details:


- 1) Go to Structures > Context.
- 2) Click **Add**.
- 3) **Name:** Type events.
- 4) **Tag:** Type OpenPublic Blocks

Note: Although this block is not an OpenPublic block, this tag will place this context in the list of contexts associated with section pages. The tag is case sensitive.

- 5) **Conditions:** Select **Path** from the dropdown.



- 6) Path:** In the text box, type *events* and *events/**

Conditions	PATH
Trigger the activation of this context	events
<Add a condition> 	events/*
Path	

- 7) **Reaction:** Select **Blocks** from the dropdown.
- 8) Select **About Our Events** block and click **Add** in the **Second sidebar**.

Reactions

Actions to take when this context is active

<Add a reaction>

First sidebar

+ Add

- ☐ Syndicate
- ☐ Recent content
- ☐ **None**
- ☒ **About Our Events (nodeblock)**
- ☐ More About Open Government (nodeblock)
- ☐ Footer Info (nodeblock)
- ☐ Press Release kit (nodeblock)
- ☐ Press Contact (nodeblock)
- ☐ Open Gov Contact (nodeblock)

Second sidebar

+ Add

- ☐ OPENPUBLIC_API
- ☐ API Status
- ☐ OPENPUBLIC_DEFAULTS
- ☐ Current navigation

First Inner

+ Add

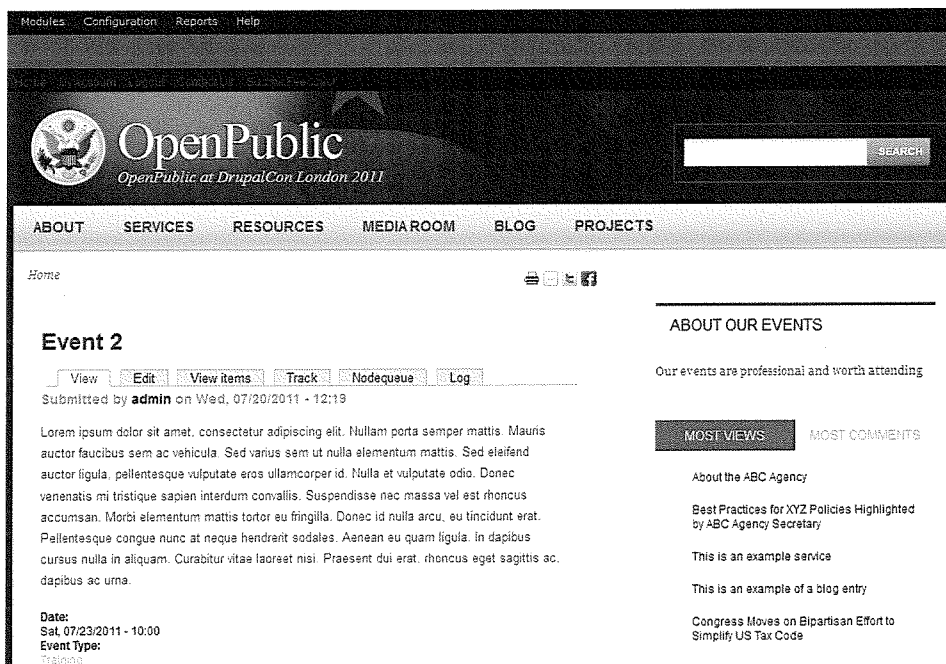
Second Inner

+ Add

On Top of Content

+ Add

- 9) **Save.**
- 10) Return to the Events landing page and see the new block.



Activity J: Remove a Block

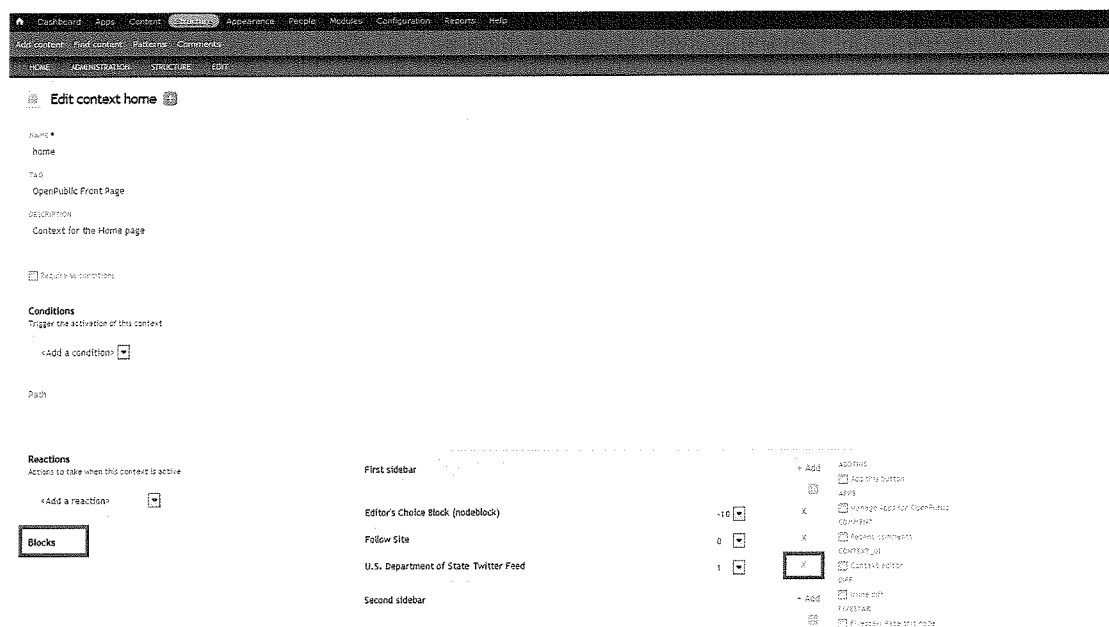
Description: This activity demonstrates how to remove a block from the homepage.

Objective: At the end of this activity, you should be able to remove a block from a context.

Prerequisites: Context lesson. Tour. Display the Event Block activity.

Activity details:

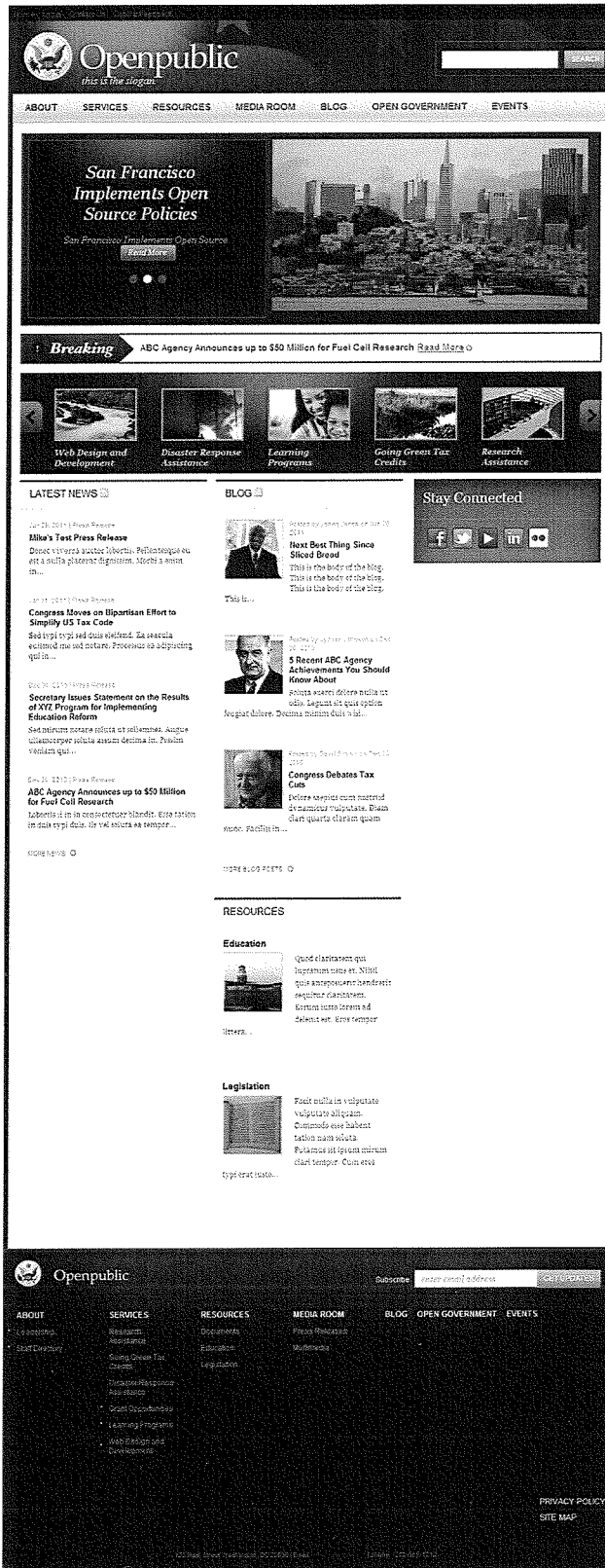
- 1) Go to Structures > Context.
- 2) Click on **Edit** for the **home** context.
- 3) Scroll down and locate the **Block** link under **Reactions**.
- 4) Click the link to display the blocks configured to show on the home page.
- 5) Locate the U.S. Department of State Twitter Feed block in the **First sidebar**.
- 6) Click the X .



- 7) Save the context.



8) Observe the home page no longer shows the Twitter block.



Section Seven: Configuration

Description: This section reviews configuration settings that are unique to the site owner and might need to be configured.

Objective: At the end of this section, you should be able to identify which configuration settings need to be customized to your site needs.

Audience: Anyone new to Drupal.

Prerequisites: Login activity

Lesson 1: Initial Configuration

Description: This lesson briefly describes and demonstrates the features that need to be configured in order to make the OpenPublic installation unique to the site owner.

Objective: At the end of this lesson, you should be able to:

- ▶ Identify the administrative interface that contains the site name
- ▶ Identify service-based features supported by external sites
- ▶ Identify features that help engage site visitors and site followers
- ▶ Recognize administrative features that support site performance
- ▶ Distinguish between content types and web forms

Prerequisites: Login activity

Lesson details:

SITE INFORMATION

This administrative page, located at Configuration > Site information, provides the following options:

- ▶ **Site name** - Which appears in the header of the site
- ▶ **Slogan** - A brief phrase that appears under the site name in the header
- ▶ **E-mail address** - The default e-mail address for the site
- ▶ **Number of posts on front page** - Not applicable for the OpenPublic home page
- ▶ **Default front page** - A means of overriding the home page with another page
- ▶ **Error pages** - The option to send users to pages with a custom default error message

SPAM BLOCKING

This administration page is located at Configuration > CAPTCHA.

- ▶ **CAPTCHA** provides a test that users must pass in order for their content submission to be accepted. It is a deterrent for automated spam bots that post messages to online forms.
- ▶ **reCAPTCHA** “improves the process of digitizing books by sending words that cannot be read by computers to the Web in the form of CAPTCHAs for humans to decipher.” (<http://www.google.com/recaptcha/learnmore>)



SHARING WITH OTHERS

This administration page, located at Configuration > Addthis, provides a way for your site visitors to share your content with others on the web using one of many different social media services.

- It provides analytics about the bookmarking and sharing activity of your users when they use this feature.
- You will need your own account at the addthis.com site.

SITE FOLLOW LINKS ACTIVITY

This administration page, located at Configuration > Site follow links, provides a way for you to provide links to social networking sites and services that site visitors can use to share your content.

PERFORMANCE MONITORING

Performance has two perspectives:

- How well your site responds to requests from your visitors
- How popular your site is perceived to be

There are several site administration pages that provide performance related content.

- **Statistics** - Configure access logs and content view counts
- **Google Analytics** - A service that can be enabled to allow Google Analytics service to monitor site interaction. You will need a Google Analytics account and key.
- **Performance** - Configuration settings that help ensure your site can quickly deliver pages to your visitors
- **Logging and Errors** - Configuration settings for your system log and error displays

WEB FORM CONFIGURATION

In addition to content types, OpenPublic comes with three forms used to foster communication.

- **Contact Us** - A form to allow visitors to send the site administrator a message.
- **Get Updates** - A form used to collect an e-mail address from visitors who wish to receive e-mail notices. It is assumed the e-mail notices would come from a third-party service such as Constant Contact or Campaign Monitor.
- **Feedback** - A form used to collect comments about the site from its visitors.

Activity A: Change Site Information

Description: This activity shows the first step in making OpenPublic yours.

Objective: At the end of this activity, you should be able to:

- Locate site information admin page.
- Change the site name.

Prerequisites: Login activity. Initial Configuration lesson.

Activity details:

- 19) Click on Configuration > Site information.
- 20) Change the name of your site.
- 21) Observe that you can change the email address.

- 22) Observe the other settings as described in the Initial Configuration lesson.
- 23) Save configuration.

Activity B: Managing Webforms

Description: This activity explores how to access and configure the OpenPublic webforms.

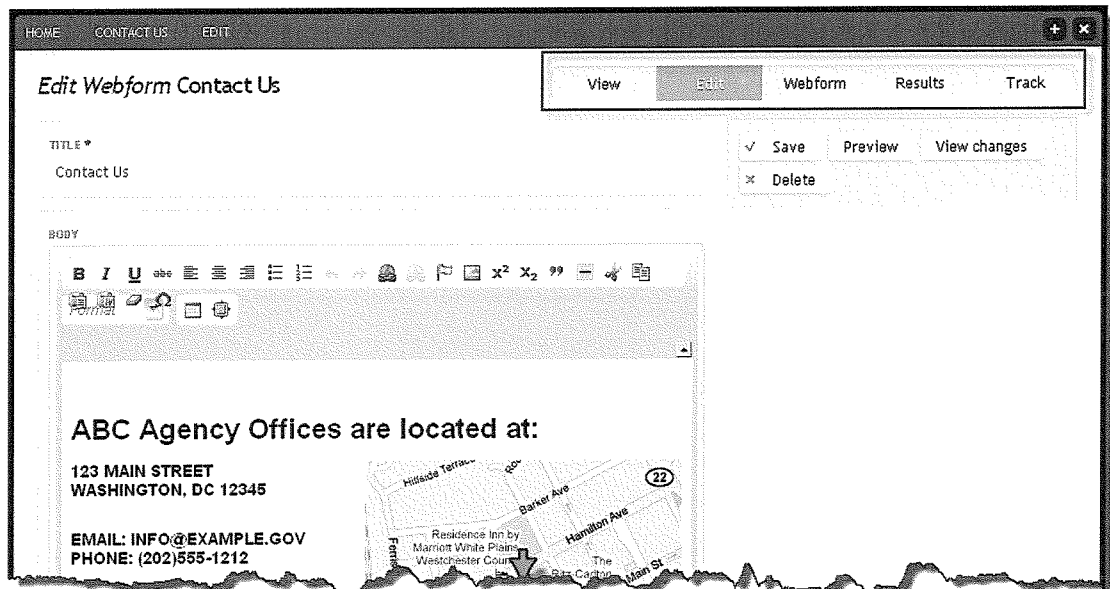
Objective: At the end of this activity, you should be able to:

- ▶ Locate the existing webforms.
- ▶ Edit a webform.
- ▶ View data collected by webforms.

Prerequisites: Login activity. Any lesson where learners have used the Find content feature. Initial Configuration lesson.

Activity details:

- 12) Click on **Find content** and filter on the **Webform** type.
- 13) Click **edit** next to the **Contact Us** form.
- 14) Observe the form looks like another content type form used to create nodes.
- 15) Locate and click on the Webform button in the top right corner.



16) Hover over the + and see your configuration options.

Name	Type	Value	Operations
Full Name	textfield	-	Edit Clone Delete
Company/Organization	textfield	-	Edit Clone Delete
Street Address	textarea	-	Edit Clone Delete
State	select	-	Edit Clone Delete
Zip	textfield	-	Edit Clone Delete
Email	textfield	-	Edit Clone Delete
Fax	textfield	-	Edit Clone Delete
Contact Me	select	-	Edit Clone Delete
Phone	textfield	-	Edit Clone Delete
Message Header	markup	<div class="divide"></div> <h...	Edit Clone Delete
Message	textarea	-	Edit Clone Delete
New component name	Textfield		✓ Add

17) Click on E-mails

18) In the address field, type an e-mail and click **Add**.

19) Observe your configuration options.

20) **Save e-mail settings.**

21) From the same menu ("Webform"), select **Form settings from the dropdown.**

22) Enter a brief confirmation message.

23) Select a **Text format**.

24) Keep **Redirection location** as confirmation message to show message entered above.

25) Keep **Submission limits** unlimited.

Note: If you want to create a survey form using the Webform content type, you might choose to limit submissions.

26) Keep the status as **open**.

27) Leave **Submission access** settings as they are.

Note: By selecting authenticated, the administrator, staff, and editor roles will also be able to submit the form.

28) Click on **Advanced settings.**

29) Hover over each option and see the popup explanation.

30) **Save configuration.**