

Intermediate Drupal Guide

Modules

The book, panel and webform modules covered in this training workshop need to be enabled on your site before they will be available for your use. To request that a specific module be enabled on your Drupal site, please email webmaster@appstate.edu.

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Books

A **Book** consists of a number of related book pages which may be organized in a hierarchical order, making it suitable for creating manuals, FAQ, resource guides, etc. The book module offers built-in navigation so that users may quickly access adjacent book pages, providing a simple system for organizing and reviewing structured information.

In order to create book pages the book module must be turned on and permissions enabled for your user role.

Create a Book Page

From the admin menu at the top, select **Create content**. On the **Create content** page, click **Book page** to start adding your new book page to the site.

Title

Enter a Book Page Title in the **Title** field. Please note that the page title of your first book page will also be the book title.

Menu Settings

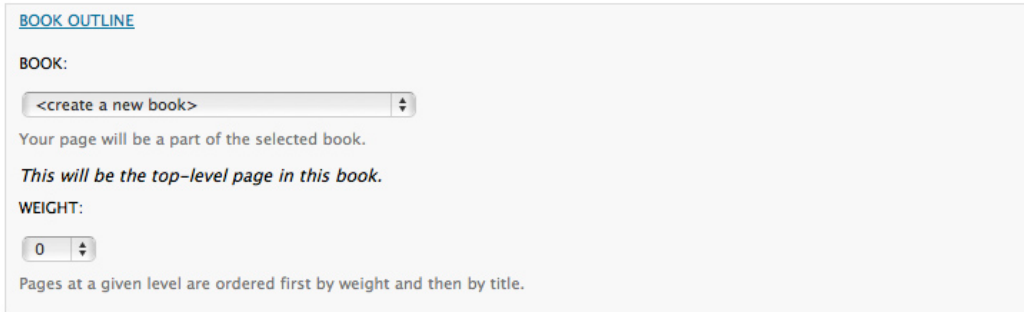
Assign a menu item for the **first page** of your book.

Body

The **Body** field is where you will enter all of the content for your new book page - text, links, images, etc. The formatting toolbar at the top has a variety of formatting options (covered in Introduction to Drupal workshop).

Book Outline

Click on **Book outline** tab. Choose **<create a new book>** from the drop-down menu.



The screenshot shows a form titled "BOOK OUTLINE". It contains a "BOOK:" label followed by a dropdown menu with the option "<create a new book>". Below this, there is explanatory text: "Your page will be a part of the selected book." and "This will be the top-level page in this book." There is also a "WEIGHT:" label followed by a dropdown menu with the value "0". At the bottom, it says "Pages at a given level are ordered first by weight and then by title."

Save

Once you have added the content to your book page, click the **Save** button to create your new **Book page**.

Create Child Pages

There are a couple of methods for creating the child pages of a book.

From the Current Book Page

While viewing the Book page that you just created, click the **Add child page** link. Give your Book page a Title and enter content in the Body.

Click on **Book outline** tab. Note that the **Book** and **Parent Item** options are already selected with the previously created Book page. Under the **Parent Item** drop down, select the Book page that you want to be the parent item of your new child page.

Click the **Save** button to create the **child page**.

From Create content

Click on **Create content**. On the **Create content** page, click Book page to add a new child page. Type in a Title and enter content in the Body.

Click on **Book outline** tab. From the **Book** drop-down menu select the original Book page that you created. Under the **Parent Item** drop down, select the Book page that you want to be the Parent Item of your new child page.

Ignore the **Weight** field for now. Click the **Save** button to create the child page.

BOOK OUTLINE

BOOK:

Your page will be a part of the selected book.

PARENT ITEM:

The parent page in the book. The maximum depth for a book and all child pages is 9. Some pages in the selected book may not be available as parents if selecting them would exceed this limit.

WEIGHT:

Pages at a given level are ordered first by weight and then by title.

Manage Book Outline

Under **Content Management**, click on the **Books** link. The **Books Administration Page** defaults to the List tab, displaying a list of existing **Books**.

Books

List Settings

BOOK	OPERATIONS
My first book	edit order and titles

Click on “**edit and order titles**” link to view or edit contents of a **Book**. The **Book Outline page** lists all pages in the particular Book. For each page of content, you have the option to rename, view, edit or delete the page.

To rename a page type a new name in the Title field and click the Save book pages button at the bottom of the page.

You can also change the order of the pages by dragging and dropping the cross icon next to each page.

My first book

TITLE	OPERATIONS
<input type="text" value="Chapter 1"/>	view edit delete
<input type="text" value="A page in Chapter 1"/>	view edit delete
<input type="text" value="Chapter 2"/>	view edit delete

Save book pages

Book Navigation Block

After creating your book, a block called “**Book navigation**” will become available in the **Disabled** section of the **Blocks** List.

You can make changes to this block using skills from the Introduction to Drupal Workshop.

Panels

Panels allow you to create custom layouts for pages on your site. A panel is made up of multiple regions, or panes, that allow you to define areas on the page where content can be displayed.

In order to add Panels to your site, the Panels module must be turned on and permissions enabled for your user role.

NOTE: Before you create your panel, all the content that you will use to populate the panes of your panel page should be created or already exist (i.e. pages or blocks). Be sure to make a note of the titles of each of the pages you will be pulling into the panel page.

Create a Panel Page

From the admin menu on top, select **Content management - Create content**. Click **Panel** to start adding your new panel to the site.

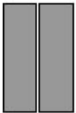
Choose Layout: From the **Category** drop-down menu, select your layout type - here you can determine the number of columns and the layout of your panels page.

Choose layout

CATEGORY:

Columns: 2 ▾

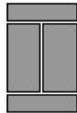
Columns: 2



[Two column](#)



[Two column bricks](#)



[Two column stacked](#)

Title: Give the Panel a title.

Menu Settings: Assign a menu item for your Panel page.

Teaser: The **teaser** is a description for your panel page. It does not display on the site.

Save: Click the **Save** button to create the Panel.

Add Content

Click the **Panel content** tab to display the panel layout.

Click the small gear icon in the top left corner of the region you want to add content to and select **Add content** from the menu.

Click **Existing node** link (at bottom) to open **Configure new Existing node** page.

My First Panel

View Edit Outline Panel layout **Panel content**

▼ Display settings

Top

side Right side

Bottom

Default Change

Save Cancel

Enter the title or NID of a node: Enter the title of an existing page of content. Be sure to use the drop-down to select the proper page from the list.

Override title: Check this box and leave the field blank if you do not want to display the title of this pane's page on your panel page. Check this box and enter a different title if you would like to display a different title on the region.

Leave node title: Leave this box unchecked.

Link the node title to the node: Leave this box unchecked.

Include node links: Uncheck this box to disable the links.

Template identifier: Leave this blank.

Build Mode: Use the drop-down menu to select Full-node.

Click **Finish** button to save configuration.

Save

Add content to other panes using previous steps. You do not have to use all panes, only those you need. Panes that are left blank will not be displayed.

Click **Save** button to save your work.

Click **View** tab to view your panel page.

Edit Panel

On the View tab of your panel page, mouse over the top left corner of the region or pane that you would like to edit until you see the **Edit node** link appear. Click on **Edit node** link to open the **Edit** tab for that node or page of content.

Once you have made changes, click **Save** button to save changes.

My First Panel

View Edit Outline Panel layout Panel content

[\[Edit node\]](#)



[\[Edit node\]](#) rem ipsum dolor sit amet, consectetur adipiscing elit. sce eget sollicitudin eros. Integer convallis eleifend sollicitudin. Aenean id ipsum justo. Maecenas porttitor velit vitae nulla interdum ultrices. Sed ac erat sapien, ac molestie arcu. Praesent vitae justo mauris, sit amet sodales diam. Donec consectetur lacinia justo, non tincidunt magna interdum vel. Etiam eget orci in est tincidunt gravida nec eget libero. Nullam aliquam

Webforms

Webforms are interactive online forms that allow you to collect information from your site's visitors. When forms are submitted, results are imported into a database that can be viewed or downloaded. Submissions can be e-mailed to designated recipients as well.

In order to create Webforms, the Webform module must be turned on and permissions enabled for your user role.

Create a Webform

From the admin menu on top, select **Content management - Create content**. Click **Webform** to start adding your new form to the site.

Title: Give your form a title.

Menu Settings: Assign a menu item for your webform.

Body: Enter any text or instructions to display at the top the form.

Save: Click **Save** button to create the Webform.

Form Components

From the Webform tab, choose Form Components. This is where you will create and edit form fields. Once the components are created, you can change the order by dragging and dropping the cross icons.

The screenshot shows the 'My First Webform' interface. At the top, there are tabs for 'View', 'Edit', 'Webform', 'Outline', and 'Results'. Below these are sub-tabs for 'Form components', 'E-mails', and 'Form settings'. A table with the following columns is visible: NAME, TYPE, VALUE, MANDATORY, and OPERATIONS. Below the table, there is a message: 'No Components, add a component below.' Below this message is a form to add a new component. It has a plus sign icon, a text input field with the placeholder 'New component name', a dropdown menu with 'Textfield' selected, a checkbox, and an 'Add' button.

Name: Type the question or other component in this field.

Type: Use the drop-down menu to select the type of field that you would like to be displayed for the response to the question or component.

- Textfield: Single-line text field (i.e. Name, Address, etc.)
- Textarea: Multi-line text field (i.e. descriptions, etc.)
- Select options: Select one or more items from list or group of radio buttons (single selection) or check boxes (multiple selection).
- E-mail: Validates the entry is an e-mail address.
- Date: Controls for entering a date
- Time: Controls for entering time of day.
- File: Controls for uploading a file.
- Page break: Insert page break for multi-page forms; Next Page and Previous Page buttons are displayed at bottom of form pages.

- **Fieldset:** Used for grouping components; use the cross icon to arrange components that are part of the group as subitems of the fieldset.
- **Grid:** Survey-type control with questions on the left and response choices in columns on the right; all questions in the grid have the same options for a response, create separate grids for different sets of responses.
- **Hidden:** Label and text in hidden field will not be displayed when entered, but will be included in the data saved.
- **Markup:** Enter custom HTML into your page

Mandatory: Check this box if you want this to be a required field. If the field is mandatory, the form cannot be submitted unless the field is filled out or selected by the user.

Operations: Click **Add** button to add the component.

Edit component

Some of these fields will be pre-populated with information that you have already entered. Each Edit component page is unique. Below you will find specific information related to each type of component.

Textfield

- **Label:** Descriptive label, visible on the form as displayed to the user.
- **Field Key:** Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- **Default Value:** Default value will be shown inside the text field when user views the form. Token values may be used and are listed below this field.
- **Description:** Description will be displayed below component, may provide instructions to help user.
- **Validation:** Determine if your component should be mandatory (may already be checked) or unique and can set maximum length of textfield if necessary.
- **Display:** Specify width labels and label display for textfield if necessary - these will use the default unless otherwise specified.

Textarea

- **Label:** Descriptive label, visible on the form as displayed to the user.
- **Field Key:** Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- **Default Value:** Default value will be shown inside the text field when user views the form. Token values may be used and are listed below this field.
- **Description:** Description will be displayed below component, may provide instructions to help user.
- **Validation:** Determine if your component should be mandatory (may already be checked) or unique and can set maximum length of textfield if necessary.
- **Display:** Specify width labels and label display if necessary - these will use the default unless otherwise specified.

Select options

- **Label:** Descriptive label, visible on the form as displayed to the user.
- **Field Key:** Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- **Default Value:** The default value of the field. If you wish for one of your options to be the default value, enter the option text. Token values may be used and are listed below this field.

- Description: Description will be displayed below component, may provide instructions to help user.
- Options: This is where you create the list of options. Enter one option per line as follows: “key_value| Readable Option”, i.e. “very_likely|Very Likely”. Use only alphanumeric characters and underscores in keys.
- Multiple: Check this option if the user should be allowed to choose multiple values.
- Load a Pre-built Option List: Use a pre-built list of options.
- Display: Allows you to select Listbox (drop-down - useful when only one item can be selected), Randomize Options and Label Display.

Email

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Default Value: Default value will be shown inside the text field when user views the form. Token values may be used and are listed below this field.
- User email as default: Check this box to to automatically display the user’s email address if they are logged in.
- Description: Description will be displayed below component, may provide instructions to help user.
- Validation: Determine if your component should be mandatory (may already be checked) or unique and can set maximum length of textfield if necessary.
- Display: Specify width labels and label display if necessary - these will use the default unless otherwise specified.

Date

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Default Value: If left blank, “Month,” “Day” and “Year” will be displayed as the default value. Token values may be used and are listed below this field - %date will display the current date according to site settings.
- Description: Description will be displayed below component, may provide instructions to help user.
- Default Value Timezone: User Timezone is selected by default.
- Validation: Determine if your component should be mandatory (may already be checked) and Start and End Year settings.
- Display: Specify if you would prefer to use a textfield for the year and label display if necessary - these will use the default unless otherwise specified.

Time

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Default Value: If left blank, “hour” and “minute” will be displayed as the default value, along with radio buttons to select AM or PM. Token values may be used and are listed below this field.
- Description: Description will be displayed below component, may provide instructions to help user.
- Default Value Timezone: User Timezone is selected by default.

- Validation: Determine if your component should be mandatory (may already be checked).
- Display: Specify time format and label display if necessary - these will use the default unless otherwise specified.

File

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Description: Description will be displayed below component, may provide instructions to help user.
- Upload Directory: Leave this blank if you want the webform uploads to be saved in site files directory. This is the default. You may specify a subfolder to store your files if you like.
- Validation: Determine if your component should be mandatory (may already be checked). Select or add allowed file extensions and maximum upload size.
- Display: Specify width and label display if necessary - these will use the default unless otherwise specified.

Page break

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.

Fieldset

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Description: Description will be displayed below component, may provide instructions to help user.
- Display: Select display option - if you want the fieldset to be collapsible.
- Conditional Rules: Create a rule to control whether or not to show this form element.

Grid

- Label: Descriptive label, visible on the form as displayed to the user.
- Field Key: Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- Options: Enter options to be displayed along the top, one option per line, using the following format: "key_value|Readable Option", i.e. "very_likely|Very Likely". Use only alphanumeric characters and underscores in keys.
- Questions: Enter questions to be displayed down the side of the grid, one question per line, using the following format: "question_one_key|Question One?", i.e. "what_is_your_favorite_color|What is your favorite color?" Use only alphanumeric characters and underscores in keys.
- Description: Description will be displayed below component, may provide instructions to help user.
- Validation: Determine if your component should be mandatory (may already be checked).
- Display: Select display and randomizing options.
- Conditional Rules: Create a rule to control whether or not to show this form element.

Hidden

- Label: Descriptive label, visible on the form as displayed to the user.

- **Field Key:** Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- **Default Value:** Default value will be shown inside the text field when user views the form. Token values may be used and are listed below this field.

Markup

- **Label:** Descriptive label, visible on the form as displayed to the user.
- **Field Key:** Machine-readable key containing only alphanumeric characters and underscores; correlates with Label.
- **Value:** Enter custom HTML into your form.

Save Component

When you have completed the **Edit component** section, click the **Save component** to save.

Clone Component

When a component is cloned, a duplicate of it is created and will include all the options you chose for the original component. Cloning can add consistency to your work and save you time.

Delete Component

Click **Delete** link to delete component. You will then be prompted to confirm your request. Click **Delete** button and your component will be deleted. Remember, once you delete a component you cannot get it back.

E-mails

Add e-mail addresses that you would like to have receive form submissions. Type in the e-mail address and click the Add button. On the Edit E-mail Settings page click on the save e-mail settings button. You may enter multiple e-mail addresses.

My First Webform

View Edit **Webform** Outline Results

Form components **E-mails** Form settings

E-MAIL TO	SUBJECT	FROM	OPERATIONS
Currently not sending e-mails, add an e-mail recipient below.			
<input checked="" type="radio"/> Address: email@example.com <input type="radio"/> Component value: select			Add

Form Settings

Confirmation Message: Enter a confirmation message to be generated when a user submits the form.

Redirection Location: Defaults to confirmation page. If desired, you can enter a custom URL in this field.

Submissions Limit: Defaults to unlimited. Can be set to limit the number the number of submissions per user.

Status of Form: Defaults to Open. You can close a form to prevent any further submissions.

Submission Access: Determine roles that can submit this webform.

Webform Results

Webform submission results may be viewed or downloaded from the Results tab of your webform.

My First Webform

View Edit Webform Outline **Results**

Submissions Analysis Table Download Clear

Showing all results. 2 results total.

#	SUBMITTED	USER	IP ADDRESS	OPERATIONS		
1	10/28/2011 - 9am	hudspethea	152.10.200.58	View	Edit	Delete
2	11/02/2011 - 9am	hudspethea	152.10.192.20	View	Edit	Delete

Submissions

Table displaying webform submissions, including time and date of submission, username and IP address. Submissions may be sorted by any of the column headers by clicking on that item.

Analysis

Table displaying response statistics for each component.

Table

Table displaying and submissions, including responses from each field, that can be sorted by Submitted Date, User or IP Address. This view provided a quick reference to all submitted values.

Download

Webform submissions may be downloaded as Delimited Text (delimiter can be specified) or a Microsoft Excel file. Select Export Format and Delimited Text Format and click the Download button.

Clear

Remove all webform submission data. Note: This action cannot be undone.

Questions?

If you have any questions about using Drupal to maintain your website, or if there are features you would like added to your website, please contact the Webmaster's Office at webmaster@appstate.edu.