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INTRODUCTION AND WEB GUIDELINES

Welcome! This user guide provides basic and advanced information to help you use Drupal successfully. Drupal is the approved content management system for Oklahoma State University. The university offers Drupal training on a regular basis. If you would like to register for an upcoming training, please visit the Human Resources website at hr.okstate.edu. You can also find useful Drupal resources at webgroup.okstate.edu/drupal-resources.

Requesting a Drupal Site

OSU colleges, departments, organizations, or groups may request a Drupal website by visiting webgroup.okstate.edu, clicking "Request Website," and following the instructions listed.

Information Technology will set up the stage site with the appropriate secure template and notify the site administrators of the stage URL. At that time, the administrator should add content or copy desired content to the new site.

Once your new Drupal website is complete, IT will redirect the URL to the new site. The site administrator should contact IT (reply to the email generated for the help ticket) when the new site is ready.

Please note that if a previous site existed at the requested URL, IT will export the database, zip up all the associated files, and make available to the site administrator once the new site is live. The old site data and database will then be deleted from the servers.

Choosing a Drupal Theme

Once a new Drupal site is created, site administrators may choose from two themes to set up their menu structure. The Orange theme is intended for sites with less than 25 pages that do not need a large menu structure. The Black theme is intended for sites that have more than 25 pages and need to edit the top navigation menu as well as side menus.

If you are unsure of which theme to select for your website, please contact Megan Horton at megan.horton@okstate.edu for assistance.

Examples of Orange and Black menu structures are provided below.
Orange theme

Black theme
Using the Web Style Guide

OSU websites are subject to requirements set forth in the university's Web Style Guide. The guide can be found at webgroup.okstate.edu. If you are editing a Drupal website, read the guide and ensure that your content and site edits conform to the style guide requirements.

Understanding Accessibility Guidelines

As a site owner or editor, you are responsible for the accessibility of your site. The OSU website is frequented by a diverse group of people from around the globe. Some of our users have visual or motor skill impairments and utilize assistive technologies such as screen readers and text-only browsers. Others view our pages using dated technologies and slow connection speeds.

It is important that all OSU website creators and editors be cognizant of these limitations and strive to make their websites accessible to the greatest number of people. OSU websites should be compliant with Section 508 of the Rehabilitation Act of 1973. View OSU's full web accessibility standards and recommendations at access.it.okstate.edu.

More information on web accessibility and Section 508 compliance is available at the following websites:

- 3 Web Content Accessibility Guidelines: w3.org/TR/WCAG20
- World Wide Wed Consortium (WC3) Accessibility Initiative: w3.org/WAI
- A List Apart Accessibility Topics: alistapart.com/topics/topic/accessibility
- Web Standards Project: webstandards.org
- Web Usability: usability.com.au
Drupal DOs and DON’Ts

As you get started creating your Drupal website, you will notice that many options exist in Drupal, some of which can be confusing to new users. If you are not careful, you can break your site or create other issues. Below are some DOs and DON’Ts to help you get started and avoid common mistakes on the system.

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<th>DON’T</th>
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<tr>
<td>Do replace demo content.</td>
<td>Don’t delete the standard content types that come installed on your site.</td>
</tr>
<tr>
<td>Do use relative links for content kept within the site, especially with “temp” or “stg” in the site name.</td>
<td>Don’t delete entire menus. Instead, move the menu block to &quot;disabled.&quot;</td>
</tr>
<tr>
<td>Do tailor the content and images appropriately for your audience groups.</td>
<td>Don’t install unapproved modules or themes.</td>
</tr>
<tr>
<td>Do use images, white space, and extra pages to make content easier to read and comprehend.</td>
<td>Don’t modify or move OSU-branded menus.</td>
</tr>
<tr>
<td>Do change the website background or use one provided by OSU Communications. Backgrounds should be simple, professional, black/white, with dimensions of 1920 by 1080 pixels.</td>
<td>Don’t move the “Main page content” block. Doing so will leave your site unusable.</td>
</tr>
<tr>
<td>Before inserting images, do resize them to the dimensions they will be displayed in, which will improve the responsiveness of your site.</td>
<td>Don’t enable extra modules that will not be used on the site.</td>
</tr>
<tr>
<td>Do use the test copy of your site to try new features or actions that could have a major impact on the site. Your test site (test-&lt;sitename&gt;.okstate.edu) may be reset by OSU-IT without notice.</td>
<td>Don’t remove or change the default IT username/account (adminn).</td>
</tr>
</tbody>
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Section 1

Basic Drupal Topics

- Working with Content
- Working with Blocks
- Working with Menus
- Working with Users
- Optimization and Configuration
WORKING WITH CONTENT

Content refers to any sort of material published in a Drupal website such as text and images. At the top of your site, you will find a link called “Content” in the administrative menu. Click this for a list of the types of content you can create. The OSU templates come with article, basic page, event, landing, and webform already configured. Each of these is discussed below.

- **Article**: Designed for time-sensitive content such as news, announcements, and blog posts.
- **Basic page**: Intended for content that will not change very often such as About Us or Contact Information.
- **Event**: Designed for content about upcoming events with fields for date and location.
- **Landing**: Not currently being used.
- **Webform**: Intended for simple, non-confidential data collection or polling. All forms must be submitted to the OSU-IT Security Office for approval. If you need a form that requires collection of sensitive information such as Social Security numbers or credit card numbers, contact OSU-IT Software Services.

Creating Content (Article, Basic Page, Event, Webform)

1. In the admin menu, select “Content.”

2. Click “Add content.”
3. Select the type of content you would like to create (e.g., article, basic page, event, webform).

4. On the resulting page, enter the details for the content type you are creating.
   a. **Body**: Place the main content for your page here.
   b. **Text format**: The default text format is Filtered HTML, which works well for text with links, italics, bold, quotes, and lists. If you want to add images, headings, or other elements not included in the default setting, you should choose Full HTML.
   c. **Tags**: Tags are a taxonomy term and are useful for filtering content (refer to the section Working with Taxonomy). To add a tags field, refer to the section Editing Content.
   d. **Image**: Use this field to add an image to the page header. To add an image field, refer to the section Adding Images.
   e. **Title (required field)**: The title will appear at the top of the published page and is the first-level heading for the page.

5. Click “Save” in the bottom left-hand corner of the page.
Adding Items to the Homepage Slideshow

1. The slideshow fields are already configured in the content type for Basic page. To add content from a basic page to the slideshow, navigate to that page and fill out the information below the Body section where the slideshow fields appear (shown below). All fields are required or the content will not display in the slideshow.

   NOTE: If the slideshow fields are not present in the content type that you are creating, please refer to the advanced section of this guide on Editing Content Types.

2. After you have filled in the required fields for the slideshow title, subtitle, and image, click “Save.”
3. On the new page that appears, click the link called “Add to Homepage Slideshow.” After you click the link, it will change to “Remove from Slideshow.”

4. To remove the content from the slideshow, just click on the item in the slideshow you would like to remove. Then go to the area under the content and click the “Remove from slideshow” link. This does not delete the content, just removes it from the slideshow.

To add the slideshow fields and links to a content type:

1. Make sure the content type is listed in the nodequeue. Navigate to Structure > Nodequeues.
2. Click “Edit” next to Homepage Slideshow. Alternatively, you can click “Add simple queue” to make a new one.

3. On the resulting page, enter the following information in the corresponding fields for your Nodequeue Homepage Slideshow.
   a. **Title**: Homepage Slideshow (or new title)
   b. **Queue size**: 12 (or max number of nodes you want)
   c. **Link “add to queue” text**: Add to Homepage Slideshow
   d. **Link “remove from queue” text**: Remove from Homepage Slideshow
   e. **Types**: Be sure the content type you want to include is checked.

4. Click “Submit.”

**To add slideshow fields to your content type:**

1. Navigate to Structure > Content types.
2. Click “manage fields” for the content type listed in nodequeue (e.g., Basic page).

3. In the “Add new group” section, enter the following information in the corresponding fields:
   - **Label:** Homepage Slideshow Settings
   - **Group name:** group_slideshow_settings
   - **Widget:** Fieldset

4. Click “Save.”
NOTE: You will now need to add three fields that are necessary for the slideshow to function: (1) Title caption, (2) Subtitle caption, and (3) Image field. The following steps will guide you through the process.

5. Complete the following steps to add the **Title caption**.
   a. In the “Add existing field” section, locate the drop-down menu for “Select an existing field.” Select “Text:field_slide_title (Slideshow Title).” All other fields are automatically filled in. The user does not need to fill those in.
   b. Click “Save.”
   c. A new window opens. Use the default options, and then scroll to the bottom and click “Save settings.”
6. Complete the following steps to add the **Subtitle caption**.

   a. In the “Add existing field” section, locate the drop-down menu for “Select an existing field.” Select “Text:field_slide_subtitle (Slideshow Subtitle).” All other fields are automatically filled in. The user does not need to fill those in.

   b. Click “Save.”

   c. A new window opens. Use the default options, and then scroll to the bottom and click “Save settings.”
7. Complete the following steps to add the **Image field**.
   a. In the “Add existing field” section, locate the drop-down menu for “Select an existing field.” Select “image:field_slideshow_image (Slideshow Image).” All other fields are automatically filled in. The user does not need to fill those in.
   b. Click “Save.”
   c. A new window opens. Use the default options, and then scroll to the bottom and click “Save settings.”

8. Drag the sliders for each of the three newly-added fields underneath and to the right of “Homepage Slideshow Settings” so that they are shown indented under the group.

9. Click “Save.”
To control the order of items in the Homepage Slideshow:

1. Navigate to Structure > Nodequeues > View.

2. Drag items to reorder their appearance in the slideshow. Click “Save.”

3. You can also choose “Reverse” to reverse the order or “Shuffle” to randomize the order. “Clear” will clear all items from the nodequeue. None of these choices will take effect until you click “Save.”

Events and Calendar Information

Events may be added within Drupal by selecting Add content > Event.

OSU has a main events calendar located at calendar.okstate.edu. Events published to this calendar are frequently highlighted on the OSU homepage (okstate.edu) and in campus publications. If you need access to add events to the calendar, email calendar@okstate.edu and include the following information:

- Name
- O-Key shortname
- Email address
- Group name (whom will you be posting events on behalf of)

You are encouraged to add important events to the calendar. Drupal offers the ability to add events to a website, but this functionality should not replace the use of the main university calendar.
**Editing Content**

Before you begin editing content in Drupal, please note that many of the content type fields cannot be edited if a piece of content for that type already exists. For example, a new website will have several pieces of the Event content type already created. These must be deleted before some of the date settings can be changed for the Event content type, as illustrated in the instructions below.

1. In the admin menu, select “Content.”

![Dashboard with Content selected]

2. Click the column “Type” to sort by type.

![Content table with types]

3. Delete the “Event” content (shown above).
To edit content:

There are two ways to navigate to content to edit it.

1. In the admin menu, select “Content.”

![Admin Menu](image)

2. Click “edit” next to the content you would like to edit.

3. Alternatively, go to the published content on the website, and click the “Edit” tab at the top.

![Published Content](image)

4. Once the “Edit” window opens, make the desired changes.

5. Click “Save.”

Managing the Display

When you make changes to the display, all content under that type (e.g., article, event) will be changed. If you need to change the formatting for a single page, please refer to the instructions for Editing Content.

To manage the order of fields on the published page:

1. To change the order or appearance of the fields in the published content type, click the “Manage Display” tab.

![Manage Display](image)
2. Choose an option from the drop-down box in the “Label” column to show or hide the label for the field.

3. To change the order in which the fields are displayed, click and drag the move handle on the left-hand side. Fields can be hidden on the published content by dragging the field under the “Hidden” group.

4. Click “Save.”

To manage the date and time display format:

Many options are available when changing the format of a field and will depend on the field type. These instructions show how to change the way the date and time are displayed.

1. To change the way the date and time are displayed on the published web page, go to “manage display.” Click the gear icon on the far right of the field to be changed.
2. Notice that the section expands. Click the drop-down boxes to choose your settings. Then click “Update.”

3. Click “Save.”

**Linking to Files**

**To link to a file:**

1. To create a text hyperlink, or link, in the body of the content, highlight the desired text, and click the link icon in the editor toolbar. (The icon looks like a globe with three chain links connected in front of it.)
2. Once the “Link” box opens, type in (or copy and paste) the URL to the file location, or click “Browse Server.”

3. The file browser will open. If the file is already on the server, simply select it from the list on the right, and then click “Insert file.”

4. To insert a file from your computer, click “Upload” and then “Browse.”
5. Browse to the file location, select it, and then click “Open.”

6. The file browser will return to focus. The name of the file just selected is in the “File” box. Click the “Upload” button.

7. Select the file from the list on the right, and then click “Insert file.”
8. The file browser will close, and focus will return to the “Link” box. Make sure the path to the file on the server is listed in the URL box, and then click “OK.” The text is now hyperlinked.

![Image of Link dialog box]

9. Save the content.

To edit the link:

1. To edit the hyperlink later, place the cursor anywhere within the linked text.
   a. Click the “Link” icon, and the “Link” box will open.
   b. Make the desired changes.
   c. Click “OK.”
   d. Save the content.

2. To remove the hyperlink, place the cursor anywhere within the linked text.
   a. Click the “Unlink” icon. (The icon looks like a globe with two unconnected chain links in front of it.)
   b. Save the content.

Inserting Images

Using large high-quality images such as those from modern digital cameras can slow down the speed of a webpage loading if they are not resized or cropped. Ideally, an image should be resized to its display dimensions before being uploaded to the site. Images in the main region of the site should be about 600 pixels wide or less to display correctly. If a higher-quality version of the image is needed, consider using a link to the full version.

Many different image editing programs can resize and crop such as Paint, Photoshop, Pixlr.com and many others. Use the one you feel most comfortable with. It is also a good idea to work with a copy of the original so you may resize again if needed.
To insert an image:

1. To insert an image into the body of your content, select “Full HTML” (under Text format), and then select the image icon in the editor toolbar.

2. In the “Image Properties” window, click “Browse Server” to insert a local copy or type a URL for a web location.
3. The file browser will open. To insert an image already on the server, simply select it from the list on the right, and then click “Insert file.”

4. To insert an image from your computer, click “Upload” and then “Browse.”

5. Browse to the image location, select it, and then click “Open.”
6. The file browser will return to focus. The name of the file just selected is displayed in the “File” box. Click the “Upload” button.

7. Select the file from the list on the right, and click “Insert file.”

8. The file browser will close. Focus will return to the “Image Properties” box. The path to the image on the server will be listed in the URL box. Be sure to put some descriptive text to describe the image into the “Alternative Text” box for users that use screen readers. (See Accessibility Guidelines section of the Introduction.)
9. Click “OK” or click the “Link” tab at the top of the box to make the image a clickable link. Follow the procedure above to either enter a URL location or browse the server to upload and link to a file.

![Image Properties](image.png)

10. Click “OK.”

11. Save the content.

To edit image properties:

1. To change an image or its properties after inserting it, go to the “Edit” page for the content, highlight the image, and then click the image icon in the editor toolbar.

![Body (edit summary)](editor.png)

2. In the “Image Properties” box, make the desired changes, and click “OK.”

3. Save the content.
To create a photo with a caption

This section provides a code that you can use to add a caption to a photograph.

Important Notes:

- The `<figure>` and `<figcaption>` tags are new in HTML5. They are supported in Internet Explorer 9, Firefox, Opera, Chrome, and Safari.
- Internet Explorer 8 and earlier versions do not support the `<figure>` and `<figcaption>` tags.
- The `<figure>` tag specifies self-contained content such as illustrations, diagrams, photos, and code listings.
- The `<figcaption>` element is used to add a caption for the `<figure>` element.

```html
<figure style="margin: 0px;">
  <img alt="Example Name" src="/sites/default/files/example.jpg" style="width: 150px;" />
  <figcaption style="text-align: center;">Example Name</figcaption>
</figure>
```
WORKING WITH BLOCKS

A block is a moveable container of content that is used to display content or menus in a specific region of your Drupal website. There are two types of blocks—content blocks and menu blocks—and the instructions in this section discuss how to create each type.

Blocks are administered from Structure > Blocks. The Blocks page provides a list of all the blocks, enabled and disabled. The enabled blocks are organized according to the region in which they appear. If you change the order of the regions on the Blocks page, make sure you save your changes for them to take effect.

Creating Content Blocks

1. In the admin menu, select “Structure.”

2. Click “Blocks.”
3. Click “Add block.”

4. On the “Blocks” page, enter the details for the new block.
   a. **Block Class Settings – CSS class(es):** Only used on the front page in the “Content Block Left” region. Three classes are formatted for this area:
      - **One-column:** Type one-column into this field for three different blocks to display three different columns of content in the content block left region.
      - **Two-column:** Type two-column into this field for one block and one-column into this field for another block to display two-column width content next to one-column width content in the content block left region.
      - **Three-column:** Type three-column into this field of one block to display content that takes the space of the whole content block left region.
   b. **Block title:** Use this field to display a title for the block on the published page. Leave this field blank if no title display is desired.
   c. **Block description (required):** This is only seen in the administrative views. It will not show on the published page.
   d. **Block body (required):** Here is where you put the content you wish to show on the published page.
   e. **Region settings:** From the drop-down menu, choose the region where you would like to block to appear. While not necessary, it is recommended that you choose the region for both Drupal themes (Drupal Black and Drupal Orange) at this time.
   f. **Visibility settings:** If the box is left blank for “All pages except those listed” (default), the block will show on all pages unless the chosen region for display does not appear on that page. For example, the region “First sidebar” does not appear on the front page of the Drupal Black template, but it does on the Drupal Orange template. The box may be left blank in the Black template for the block not to show, but for the orange template, the box should contain `<front>` in order for the block to not show on the front page. For the block not to show on
secondary pages, the box should contain a list of pages (e.g., node/36 or /news) each page on a separate line.

If the box is left blank for “Only the listed pages,” the block will not show on any page. Type <front> into the box if the block should show only on the front page. Otherwise, type the list of pages on which the block should show in the box each page on a separate line. The only exception is noted above where the display region is not present on certain pages.

5. Click “Save blocks.”

**Creating Menu Blocks**

1. In the admin menu, select “Structure.”

![Image of the admin menu with Structure highlighted and the Blocks section expanded]

2. Click “Blocks.”
3. Click “Add menu block.”

1. On the “Blocks” page, enter the details for the new menu block.
   a. **Block title**: Use this field to display a title for the block on the published page. Type <none> if no title display is desired. If left blank, the menu title will become the block title.
   b. **Administrative title**: This is only seen in the administrative views. It will not show on the published page. If left blank, the block title will be used.
   c. **Menu**: Main menu is the default. The drop-down box contains a list of menus from which to choose.
   d. **Starting level**: Use the default setting [1st level (primary)].
   e. **Maximum depth**: Use the default setting (Unlimited).
   f. **Region settings**: The drop-down box contains a list of regions. Choose the region where you would like to block to appear. Recommended regions for menu blocks are “First sidebar” and “Second sidebar.” While not necessary, it is recommended that you choose the region for both Drupal themes (Drupal Black and Drupal Orange) at this time.
   g. **Visibility settings**: If the box is left blank for “All pages except those listed” (default), the block will show on all pages unless the chosen region for display does not appear on that page. For example, the region “First sidebar” does not appear on the front page of the Drupal Black template, but it does on the Drupal Orange template. The box may be left blank in the Black template for the block not to show, but for the orange template, the box should contain <front> in order for the block to not show on the front page. For the block not to show on secondary pages, the box should contain a list of pages (e.g., node/36 or /news) each page on a separate line.

   If the box is left blank for “Only the listed pages,” the block will not show on any page. Type <front> into the box if the block should show only on the front page. Otherwise, type the list of pages on which the block should show in the box each
page on a separate line. The only exception is noted above where the display region is not present on certain pages.

2. Click “Save blocks.”

**Editing Blocks**

Blocks can be edited from two places. The first location is in the menu administration page at Structure > Blocks. The second is from a page where the block displays.

**To edit from the Structure > Blocks page:**

1. In the admin menu, select “Structure.”
2. Click “Blocks.”
3. Click “configure” next to the block you would like to configure.
4. Click “Save block” when finished.

**To edit from a page where the block displays:**

1. Hover over the block, and a gear icon will appear. Click the gear icon to see options.
2. Click “Configure block.” The page with the block settings will open.
3. Click “Save block” when finished.
WORKING WITH MENUS

A menu is a set of links (menu items) used to navigate the website. Menus are administered from Structure > Menus. Each menu automatically creates a block of the same name. The blocks page contains the settings for how and where your menus will be displayed.

Menus You Cannot Modify

There are several menus within OSU's secure templates that MUST NOT be modified. These menus are shown below.

Top Bar and University Links Menu

![Top Bar and University Links Menu](image1)

Orange Template University Navigation Menu

![Orange Template University Navigation Menu](image2)

University Footer Menu & Locations Menu

![University Footer Menu & Locations Menu](image3)

OSU Black Template

The black template allows you to control the links in both the primary and secondary menu.

- The top navigation menu is called Main Menu on the Menu administration page. Links can be added and removed from this area. The menu block itself is added to the template programmatically and cannot be removed or moved to another region.

- The default secondary menu on the homepage is “Right Sidebar Menu” on the Menu administration page. The corresponding menu block is “Right Sidebar Menu” and is located in the “Second Sidebar” region.
• The default secondary menu for all other pages is “Example Sidebar Menu.” The corresponding menu block “Example Menu Block” and is located in the “First Sidebar” region.

OSU Orange Template

The orange template allows you to control only the secondary menus. The primary top-navigation menu is filled with the standard university links.

Creating a New Menu

1. In the admin menu, select “Structure.”

2. Click “Menus.”

3. Click “Add menu.”
4. Give your menu a title and a description.
5. Click “Save.”

**Adding Menu Links**

Menu links can be added from two locations. The first location is in the menu administration page at Structure > Menus. The second is from the content itself.

**To add a link from the menu administration page:**

1. In the admin menu, select “Structure.”

2. Click “Menus.”
3. From the list of menus, locate the menu you wish to modify.
   
   - **Add link:** Takes you straight to the new link page.
   - **List links:** Shows you all the links that are already on the menu, and it allows you to edit an existing link, delete an existing link, enable/disable links, and add new links.

   ![Image of menu settings](image)

   **To add a menu link at content creation:**

   You also have the option to create a new menu link anytime you create or edit a piece of content.

   1. When on a content’s Edit page, scroll down to the bottom and look for Menu Settings.
   2. Check the “Provide a menu link” box.
   3. Add a Menu Link Title and select the parent item. If you wish your link to be a top-level link, the menu you wish to add it to will be the parent item. If the link should be a child link of another item already in the menu, you can select that other link as the parent item.
   4. You can also assign a weight to change the order your link appears in the menu.

   **Reordering Menu Links**

   1. In the admin menu, select “Structure.”
   2. Click “Menus.”
   3. Select “List links” next to the menu that you would like to reorder.
   4. Links can be rearranged by click + dragging the move handle up/down to move the menu higher or lower in the list. You can also drag the move handle to the right to make the menu item a child item of the link above it.
   5. When you are finished reordering your links, click “Save configuration.”
Disabling/Deleting Links

Menu links can be disabled or deleted from the menu administration page at Structure > Menus. Disabling a link will remove the link from the menu displayed to the end user, but the link will stay in the menu administration and can easily be enabled later. Deleting a link will delete the link permanently. If you delete a link, and later want it back, you will have to create a new link.

1. In the admin menu, select “Structure.”
2. Click “Menus.”
3. Select “List links” next to the menu that you would like to reorder.
4. To disable a link, uncheck the box next to the link you wish to disable, and click “Save configuration.”
5. To delete a link, click “Delete” next to the link you wish to remove. When the confirmation window appears, click “Confirm” to permanently delete the link.
WORKING WITH USERS

The User module allows you to add users and assign roles for managing the content and functionality of your website. Roles provide permission to access various features in the site. There are two roles that have been created for your Drupal website:

- **Site administrator**: Can edit most functionality.
- **Content administrator**: Can only manage content.

**Adding a User**

1. In the admin menu, select “People.”

2. Click “Add user.”

3. Enter the following information in the corresponding fields:
   - **Username**: O-Key shortname
   - **E-mail address**: O-Key e-mail address
   - **Password & Confirm password**: Once the account is created, it will authenticate through OSU LDAP (O-Key credentials), so anything you put here will work.
   - **Status**: Active
   - **Roles**: Check either site administrator (can edit most functionality) or content administrator (can only manage content).

4. Click “Create new account.”
While many of your Drupal settings are preconfigured, there are some additional options you can enable to make it easier to work with your site.

**Setting up the Site Name and Webmaster Email**

1. Navigate to Configuration > Site information (under System).
2. Under SITE DETAILS, type the site name and email address into the appropriate fields, and click “Save configuration.”
3. You can also edit the Webmaster email link at the bottom of the template. To do this, go to Structure > Menus > List links (for the Footer Menu). Edit the webmaster link and change the path to “mailto:yourname@okstate.edu” (where yourname@okstate.edu is your OSU email address).
4. Click “Save.”

**Turning off Formatting on Copy and Paste**

Copy and pasting information can save a lot of time, but it can also cause display issues when it brings the formatting from other editing programs with it. The best way to format a document is to do it within the Drupal text editor itself.

1. You may wish to enable “force as plain text” to eliminate strange formatting and make working with copy and pasting easier. To do this, go to Configuration > CKEditor (under Content Authoring).
2. Click “Edit” next to the “Full” profile.
3. Expand the Advanced options, and change “Force pasting as plain text” to enabled.
4. Click “Save” at the bottom.
5. Repeat the steps for the “Advanced” profile.

**Turning on Auto Spell Check**

You can always run a spell check manually through the content editor in Drupal, but you may wish to enable auto spell check.

1. To enable auto spell check, go to Configuration > CKEditor (under Content Authoring).
2. Click “Edit” next to the “Full” profile.
3. Expand the Advanced options, and change Spellchecker to “Yes.”
4. Click “Save” at the bottom.
5. Repeat the steps for the “Advanced” profile.
**Setting a Default Input Format**

The default input format for editing content is Filtered HTML. As a developer, this input filter limits the type of HTML tags you can have in your document to paragraph tags and line breaks. You can manually switch the editor to “Full HTML” underneath the page body to allow other HTML tags, but you may wish to make “Full HTML” the default input type.

1. To make “Full HTML” the default input type, go to Configuration > Text formats (under Content Authoring).
2. Grab the move handle next to Full HTML, and drag it above Filtered HTML to make it the default format.

**NOTE:** It will only default to Full HTML when a user has the privilege to use that format. If a user does not have those permissions, it will default to the next available input filter they are allowed to use.

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**Setting up URL Aliases**

URL Aliases allow a page to be accessed by going to a human readable name such as http://page.okstate.edu/my-webpage rather than http://page.okstate.edu/node/28. This can also improve Search Engine Optimization (SEO) for your site.

The default URL aliases for Drupal are page.okstate.edu/content/Node-Title. You may wish to change this to something more meaningful. Automatic aliases can be defined for all content types at once, or for each individual content types (e.g., Articles could have different patterns than Events).

1. To set up automatic aliases, go to Configuration > URL aliases (under Search and Metadata).
2. Select the Patterns tab at the top of the page.
3. Define patterns for any or all of the content types that you would like. Instead of having Articles become content/article-title, you may wish them to display as articles/article-title.

You can use tokens in the patterns as well. Tokens are variables that will be defined when the content is created. Common tokens are the Node’s Title, ID, author, creation date, taxonomy. Using a taxonomy token, you could create a pattern that would automatically alias the page URL to something like http://page.okstate.edu/site-section/page-title. To use taxonomy patterns, you must first set up a taxonomy vocabulary and attach it to your content types.
Changing the Background

A default image is set and will display unless you select a different image as the background image. The default background image size is 1920w x 1257h. Your customized background image must be black and white, not color, and the allowed file types are jpg, jpeg, and png.

Important Notes:

- Do not put spaces in the title of the photo. This causes a problem in the database on the server.
- Do not add or delete background images except through Configuration > User Interface > Dynamic background.
- Do not upload/delete the images directly to/from the backgrounds folder.

To add a customized background image:

1. In the admin menu, select “Configuration.”

2. Click “Dynamic background” (under User Interface).

3. Click the “Browse” button, and browse to the folder where the image is located.
4. Double-click the image you would like to upload.
5. Click “Save configuration.”

6. Check the box for “Use picture as background,” and then click “Save configuration.” The background image is now set.
Section 2

Advanced Drupal Topics

- Working with Views
- Working with Taxonomy
- Working with Modules
- Working with Webforms
- Working with Content Types
- Working with Files and Images
- Search Engine Optimization
WORKING WITH VIEWS

Views are a feature of Drupal that allow you to create a list of content items to display to your users. For example, you might set up an Events view to show a list of all the events that you have added to your site. By using more advanced options, the Events view can be more specific such as displaying only those events that will start in the next seven days.

To see all views that are set up on your website, go to Structure > Views.

A view can appear as a separate page within the website, as a block that can be assigned to a region within the template, or both. For more on blocks, refer to the section Managing Blocks.

Creating a New View

1. In the admin menu, select “Structure.”

2. Click “Views.”

3. Click “Add new view.”
4. On the “Add new view” page, enter the details for the new view.
   a. **View name:** Allows you to assign a unique name to the view. This box must be filled out.
   b. **Description checkbox:** Allows you to enter a description of the view’s purpose, if checked.
   c. **Show:** Determines what type of items will be displayed in the view. There are several associated fields that change depending on what type is chosen. Popular options include the following:
      - **Content:** Any page, event, form, etc. added to the website.
      - **Comments:** Comments added by people viewing the site if your pages are set to allow commenting.
      - **Files:** Files that have been uploaded to the website.
      - **Content revisions:** Shows a list of all content items based on when they were last edited.
   d. **Of type:** Selects which type of content will be included in the list created by the view.
   e. **Tagged with:** If content has been tagged with taxonomy terms, this field filters what will show up in the view. Only that content with a taxonomy term matching what was entered in the field will be displayed. If left blank, no filtering occurs.
   f. **Sorted by:** Controls what order the content will be listed in on the view.

5. Also on the “Add new view” page, notice that there are two checkboxes: “Create a page” and “Create a block.” You can check one or both of these boxes. However, checking neither results in a view that does not have a means of being readily displayed. Continue entering the details for the new view.
   a. **Page/block title:** By default, the page and block titles are the same as the view name.
   b. **Path:** Path is a required field for the “Create a page” option. It creates a URL to access this view page.
   c. **Display format:** Determines how the listing will appear in the view. Popular options include the following:
      - **Grid:** Results appear in a grid fashion. By default, the view is arranged horizontally into four columns.
      - **HTML list:** Listings appear as a formatted list (e.g., bulleted list).
      - **Jump menu:** Creates a “Go” button and a pull-down menu with an entry for each listing. When a listing is chosen and the “Go” button is clicked, the site will bring up the associated content.
      - **Table:** Each listing is a separate row with the associated fields appearing as separate columns that can be sorted by clicking the column title.
Unformatted list: Results appear without any formatting. This is useful if custom CSS formatting will be applied to the results.

d. Of: Options in this pull-down menu determine what will be displayed, including the following:
   - Teasers: Displays the first few characters of the item’s body text.
   - Full posts: Lists the entire contents of each item in the list.
   - Titles: Shows only the titles of each item.
   - Titles (linked): Shows the titles and makes these titles link to the full contents of the item.
   - Fields: Allows for setting which fields will be displayed in advanced options.

e. With/without links: Determines whether the listings appear with or without “add comment” links.

f. With/without comments: Determines whether existing comments are shown along with the listing on the view.

g. Items to display: Determines how many results can be shown at one time.

h. Use a pager: Adds next and previous page links to the bottom of the page if there are more than “Items to display” results in the view.

i. Create a menu link: Automatically adds a link to a menu.

j. Include an RSS feed: Allows site visitors to see updates to the view as an RSS feed.

4. Click “Save & exit” to create the view. Alternatively, click “Continue & edit” to continue to the advanced options discussed in the next section.

Advanced Options

To access the advanced options, either click “Continue & edit” at the bottom of the first page during view creation or go to Structure > Views and then click “Edit” on the left side of the list of views.

Most of the advanced options are shown in a pop-up window. At the top of this window will be the option of applying any changes to “All displays” or “This page/block.” If both a page and block were created, the first option will apply any changes to both while the second will only apply the changes to the page or block as was selected.

A full description of each advanced feature is beyond the scope of this document; however, an overview of the various sections of this page is provided below.

- Title: Determines the title of the page or block. By default, this is the same as was entered on the initial creation page.
- **Format:** Determines the format of the page or block. By default, this is the same as was entered on the initial creation page.

- **Fields:** Lists which fields from the different items will be displayed in the view. Also, by clicking on the field listed, it is possible to format how the field will be displayed.

- **Filter criteria:** Lists the criteria used for selecting which items will appear in the listing. It is possible to add more criteria. Additionally, it is possible to make filter criteria exposed to site users, allowing them to change the criteria for the view.

  **NOTE:** Dates used in filtering can be ‘relative dates’, for example filtering events where the start date is greater than or equal to ‘now -1 day’ would pull all events from yesterday forward.

- **Sort criteria:** Shows how the listings will be sorted. Additional sort criteria can be added to provide finer control of the results.

  **NOTE:** Results are sorted by the criteria in the order they are listed. Thus, sorting by date and then title will produce different results than sorting by title and then date.

- **Page/block settings:** Controls the path and menu listings for pages as well as the access for both blocks and pages.

- **Header & footer:** Allows the creation of a header & footer, respectively, that will appear at the top and bottom of a block or at the top and bottom of every page of listings.

- **Pager:** Controls how the “More” link will appear at the bottom of the block or the “Next,” “Previous,” “First,” and “Last” links will appear on the pages of the listing.

- **Advanced:** Provides miscellaneous settings.
WORKING WITH TAXONOMY

Taxonomy is a core module in Drupal that allows you to organize your website content into categories. The category structure is managed by taxonomy vocabularies and their terms. A vocabulary is a category container. A term is a word or phrase that describes the content in a container. For example, a vocabulary called “Fruit” might contain the terms “Apple” and “Banana.”

Taxonomy items are administered from Structure > Taxonomy.

When working with taxonomy, the first step is creating a vocabulary and then adding terms. Then the arrangement of terms can be flat, as in a tagging system, or hierarchical, with parent-child relationships. The instructions in this section take you through the steps of creating and managing vocabularies.

Creating a New Vocabulary

1. In the admin menu, select “Structure.”
2. Click “Taxonomy.”
3. Click “Add vocabulary.”
4. Choose a name and description for your vocabulary. For example, to create a vocabulary to associate content with the various areas of your site, you could name the vocabulary “Site Sections.”
5. Click “Save.”

You will be taken back to the Taxonomy Management page where you will see the newly-created vocabulary listed.

Adding Terms to a Vocabulary

1. In the admin menu, select “Structure.”
2. Click “Taxonomy.”
3. Select “add terms” next to the vocabulary name.
4. Choose a name and description for your new term. For example, in a vocabulary for Site Sections, your terms might be Departments, Research, Students, Faculty/Staff, and Blog. In addition, giving each term a helpful description makes it easier to tag content later.
5. Click “Save.”

You will be taken back to the Add Terms page where you may continue adding terms.
Managing the Relations of Terms

Once you add terms to a vocabulary, you can change the order of the terms. You can also group terms into parent-child relationships to help organize sections of content into subsections.

1. In the admin menu, select “Structure.”
2. Click “Taxonomy.”
3. Click “list terms” next to the vocabulary name.
4. To reorder terms, grab the move handle next to a term, and drag the term to the desired position in the list.
5. To make a parent-child relationship with terms, grab the move handle next to a term, and drag the term underneath and to the right of the term you wish to be the parent.
6. Click “Save.”

You can also manage the relation of terms from the “Edit term” page. Click “Edit” next to the term you wish to be the child term. Expand the “Relations” field group, and click on the term you wish to be the parent. Make sure to save your changes.

Tagging Content

To use taxonomy terms to organize your content, the vocabulary must be associated with the content type. You must first enable taxonomy and your vocabulary for each content type (Article, Basic Page, Event, etc.).

1. To display a list of the content types on your site, go to Structure > Content types.
2. Select “manage fields” for the content type you wish to allow taxonomy on.
3. In the “Add new field” box, type a name for the field that will appear on the content page, where the user will be selecting the taxonomy. Often, this will simply be the vocabulary name.
4. In the “field type” menu, select “Term reference.”
5. In the “Select a widget” menu, choose your widget. There are three options:

   - **Autocomplete term widget (tagging):** Allows users to type terms into a blank text box. If the term is already in your vocabulary, it will display below the text box for the user to select. If the term is not already in the vocabulary, it will be added. If you have chosen to allow multiple values, the user can input multiple terms separated with a comma. This widget is great for tagging photos, where there will be multiple values and all of the terms a user will want to use cannot be anticipated.

   - **Checkboxes/radio buttons:** Lists out all the terms with either radio buttons (if you allow only one value) or checkboxes (if you allow multiple values). The user cannot add terms to the list with this widget, making it an ideal choice where structure is important. This can take up a lot of space, so if there are many terms in the vocabulary, a Select list (discussed below) may be a better choice.
Select list: Works the same as radio buttons/checkboxes. Users can select multiple values by holding down CTRL and clicking (if you have chosen to allow multiple items). Also, this widget can be a space saver if you have a lot of terms in the list.

6. Click “Save.” This takes you to Vocabulary selection.

7. Select the Vocabulary you wish to use, and click “Save Field Settings.”

8. The next page will have the basic settings for the Taxonomy field, as it applies to this content type. You can choose to make the field required or optional, supply additional help text to the user, set a default value, and set a number of allowed values.

9. Setting the number of allowed values > 1 will allow the user to select or input multiple values. This can be helpful if a page should display in more than one location. Another example would be allowing multiple tags for a photograph.

10. Click “Save.”

You can now tag a piece of content by creating/editing a node of the content type on which you enabled taxonomy.

Using Taxonomy within Views

Taxonomy can be used within the Views module to create advanced filters for your views.

Taxonomy Pages

By default, Drupal creates a taxonomy page for every term you create at http://yoursite.okstate.edu/vocabulary-name/term-name. This will show all published content on your site tagged with that particular term.
WORKING WITH MODULES

A Drupal module is an extension or plugin that adds functionality to your website. Each widget or building block in your Drupal site is likely tied to a specific module. That is, menus are created with the Menu module, and users are created with the User module. This modularity allows a site architect to pick and choose the pieces that are needed while omitting building blocks that are not needed.

Core and Contributed Modules

There are two main types of Drupal modules:

- **Core modules**: Included in the basic installation of Drupal. In most circumstances, you will not need to enable or disable the modules in this group. For example, disabling the Block or Menu modules would have catastrophic effects on a Drupal site.

- **Contributed modules**: Created by users in the OSU Drupal community. These modules have been tested and approved for use. Some are crucial to proper site operation, and others simply extend functionality on an as-needed basis. A list of approved Drupal modules is located at [security.okstate.edu/Accepted%20Drupal%20Modules](security.okstate.edu/Accepted%20Drupal%20Modules).

Enabling and Disabling Modules

On the administrative menu, you will find a link called “Modules.” Click this to access and manage the modules for your site. The Enabled checkbox shows the status of any module:

- If the box is unchecked and grayed out, the module is missing another module that is required for it to function correctly.
- If a box is checked and grayed out, the module is required by another module that needs to be disabled first.

The Views module is a key component to many of the blocks that are provided. **You should never disable the Views module.** Some optional modules are available that extend the functionality of Views. The Views Slideshow module is necessary for the homepage slideshow. The other Views modules can be enabled or disabled without any effect on the rest of the site.

In order for the site login to remain tied to the OSU Active Directory, **you should never disable the modules in the Lightweight Directory Access Protocol section.** The likely outcome of disabling these modules is that a user will no longer be able to login to the admin section of their site.

It should be safe to disable any of the other modules in the list; however, please note that disabling a module will remove any related functionality from the Drupal site. Disabling modules often causes unexpected side effects and is not recommended.
**Requesting a New Module**

A formal review process of every module is necessary to maintain the integrity and security of the shared hosting environment that is provided to OSU departments. If the need arises for a module that is not already available, a request and explanation of need should be sent to OSU Communications. OSU Communications will propose the module to the Drupal Think Tank committee to review the request and determine whether it benefits the Drupal community that uses the shared hosting environment.

If approved, the module is installed on a staging site for the IT Security Office (ISO) to perform vulnerability testing. Once ISO approves the module, it is included in the incremental patches that are rolled out by the IT systems administration to all Drupal sites. If a security vulnerability is observed, the module will not be made available for use.
WORKING WITH WEBFORMS

Webforms are online forms that users can submit to the website such as a feedback form. Webforms are created from Content > Add content > Webform.

Webforms are intended for simple, non-confidential data collection or polling. Before you use Drupal’s webforms, you should make sure that the form best meets your requirements. Drupal was designed as a platform primarily for sharing webpages on the Internet, and it does not host complicated forms very well or very securely. If you need to use complicated forms, consider a different platform.

Below are some good examples of Drupal webforms:

- “Send us an email” contact forms where users can send an email to a designated address or leave a message on the site
- Simple nonscientific surveys
- Name and email collection to be added to a newsletter

Below are some examples of when webforms should NOT be used:

- Gathering sensitive information such as health care or banking information
- Complicated surveys that take multiple pages
- Forms that require a login to access
- Gathering information that only a few select administrators should see

If you need an extra layer of privacy for your form, contact the IT Helpdesk to have all site traffic moved to a secure connection to prevent others from reading the form when it is transmitted. Enabling does not mean sensitive information can be gathered on the site. Moving to a secure connection can cause issues with some resources on sites such as videos, social media widgets, and images hosted by other websites.

Creating a Webform

Before you begin, make sure the Webform module in Drupal is enabled (it is turned on by default). Each webform you create will be different depending on its purpose and intended use. The instructions below provide a basic overview of how to create a webform. Refer to the section for “Enable CAPTCHA” to add protections against automated spam.

1. In the admin menu, select “Content.”
2. Click “Add content.”
3. Click “Webform.”
4. Enter a title and a description of the form you are going to present. You may edit later.
5. Check the URL path settings. Depending on your site settings, it might be automatically created, or you might need to fill in the desired URL for the form. This is a good point to modify other settings about this form.

6. Click “Save.” The next page will show the form creation page.

7. In the **LABEL** field, add a label for the first piece of information you are gathering. Example: name

8. In the **TYPE** field, select the type that best matches the kind of information to be gathered.
   - **Fieldset**: Groups multiple components together. It can also collapse fields that are inside the field set. Example: Gathering information for a scheduled appointment a fieldset could group a date and time together into an appointment.
   - **File**: Allows users to upload a file. This is not recommended.
   - **Grid**: Creates a grid of questions, which is similar to that used in many surveys.
   - **Hidden**: Attaches hidden values to the submission.
     - **Markup**: Adds an additional block of text where you may give direction to the user. Many of the types have built-in fields for giving direction to users.
   - **Page break**: Any labels added after this will appear on the next page of the form.
   - **Select options**: Creates radio buttons, drop-down lists, or select multiple list boxes.
   - **Text area**: Takes large amounts of text information such as paragraphs.
   - **Text field**: Used for small pieces of text such as a name.
   - **Time**: Time of day.

9. In the **MANDATORY** filed, check the box if the item is required.
10. In the **OPERATIONS** filed, click “Add.”
11. Each label will be different depending on which type was selected. Follow the on-screen directions. When finished, click “Save component.”
12. Return to step 7 until the form is completely built.
13. Adventurous users can add extra form validation by clicking the “Form validation” tab on the “Webform” tab.

14. Depending on the needs of the form, emails can also be sent on completion of the form an administratively set email address or an email address entered in the form. The latter is not recommended due to potential for abuse.

15. Once finished view and complete the form in a way you would expect a user. Make changes to the form as needed.

**Viewing the Results of Forms**

Again, due to the flexibility of webforms, it is a complex subject to cover. While you are logged in, you can view the outcome of the form by going to the page the form is on and clicking the “Results” tab. Administrators have the ability to view submissions, summarized analysis, and tabled submissions. Administrators can also download the information in spreadsheet format. Individual submissions may be deleted individually or all the submissions can be cleared.

**Adding a reCAPTCHA Option to Webforms**

A CAPTCHA is a simple puzzle or question that prevents computer automation from abusing the form. Most people encounter these as distorted words that they read and then enter into the text block below it. The secure templates have several different CAPTCHA options available; however, for accessibility purposes, only reCAPTCHA should be used.

**To enable and configure the reCAPTCHA module:**

You only need to complete the steps in this section one time before you can begin using reCAPTCHA on a form.

1. In the admin menu, click “Modules.”
2. Find the CAPTCHA and reCAPTCHA modules in the Spam Control section of the page, and then check the corresponding boxes next to them. Scroll down to the bottom of the page, and click “Save” to enable the modules.
3. In the admin menu, click “Configuration.”
4. Click “CAPTCHA” under the People section.
5. Use the first drop-down box on this page to change the Default Challenge Type to “reCAPTCHA (from module recaptcha).” Check the box next to “Add CAPTCHA administration links to forms.” Click “Save Configuration” at the bottom of the page.
6. Click the RECAPTCHA tab near the top-right of the page.
7. Click the “Register for reCAPTCHA” link. A new window or tab will open. You will need to use a google account to register for the reCAPTCHA service.
8. If your site might change domain names, click the “Sign up for multiple keys” button, and follow the onscreen instructions.
9. Once you have registered for reCAPTCHA, go back to your Drupal page and enter the public and private keys that correspond with your site’s domain. When finished, click “Save configuration.”

   **NOTE:** If your URL changes, such as removing the “temp-” from the name, you need to update the public and private keys in step 10 for reCAPTCHA to continue working.

**To add CAPTCHA to the webform:**

1. Go to the webform page that needs the CAPTCHA.
2. In the “CAPTCHA” section that appears on the page, expand the section, and click “Place a CAPTCHA here for untrusted users.”
3. The “Challenge type by default” should be “reCAPTCHA.” If not, select it.
4. Click “Save.”
5. Log out of the site to test the form. The CAPTCHA should now appear.
6. Repeat these steps for any other forms on your site.
WORKING WITH CONTENT TYPES

A content type is collection of fields that display together to make up the pages and nodes on your website. The default Drupal install contains several content types suitable for the majority of websites (e.g., Article, Basic Page, Event, Webform), but as you become familiar with Drupal, you may wish to create new content types beyond the basic page or event.

Customizing content types allows you to add new fields, change how fields are displayed, change default publishing and revision options, and more. Before you begin, it is helpful to plan what type of data you would like to collect and how you would like the published version to look.

**NOTICE:** Modifying existing content types may have an effect on other modules and pages within Drupal. Make sure you are comfortable with the instructions in this section before making changes.

Creating Custom Content Types

1. In the admin menu, select “Structure.”

2. Click “Content types.”
3. Click “Add content type.”

4. On the “Content types” page, enter the details for the customized content.
   
   a. **Name (required field):** The name should be somewhat descriptive of the content (e.g., Events).

   b. **Description (optional):** Brief description of the purpose of the content type. The description will show on the “Add new content” page.

   c. **Submission form settings:**
      
      ▪ **Title field label:** What you would like the main page title field to be called. Typically this can be left at the default “Title,” but you may wish to change it based on the content you are creating. For example, for a faculty profile content type, you may wish to change the Title to “Faculty Name.”

      ▪ **Preview before submitting:** You can enable/disable the ability to preview what the content will look like before actually saving it in Drupal. The default option of “Optional” is generally fine.

      ▪ **Explanation or submission guidelines (optional):** You can use this field to add additional instructions for your content editors for this content type.

   d. **Publishing options (optional):** Typically, you can use the default settings.

      ▪ **Published:** Choose whether a newly-created piece of content will be published by default or if it will have to be published manually later.

      ▪ **Promoted to front page:** Not used in the default templates. Can be used with the Views module for some advanced/custom views.

      ▪ **Sticky at top of lists:** Not used in the default templates. Can be used with the Views module for some advanced/custom views.

      ▪ **Create new revision:** Checking this will enable revisioning by default on this content type. This will allow administrators to see all past versions of a page, even after changes have been made.

   e. **Display settings:** Provides a checkbox item for whether you want to display the author and date information.

   f. **Comment settings:**
• **Default comment setting for new content**: Choose whether you want to allow comments on your page. Typically you will want this set to **closed** to turn off commenting.

g. **Menu settings:**

  • **Available menus**: Provides a list of available menus in which to place links for this content type.
  
  • **Default parent item**: List of menus to be the default parent for the new link.

5. Click “Save and add fields.”

6. The “Manage fields” page for your new content type will open. The default fields for the new content type are Title and Body. You may add other fields.

   **NOTE:** Click “Save” after you format each new field in order to add it to the content type.

7. On the “Manage fields” page, locate the “Add existing field” > “Select an existing field” section to determine if the field you want to add has already been formatted.

8. If the field you want has already been formatted, follow the steps below.
   
   a. Simply select the field. All other fields will be filled in.
   
   b. Click “Save.”
   
   c. When the page to edit settings for the field opens, use the default settings.
   
   d. Click “Save settings.”
9. If the field you want has not been added, use “Add new field.”
   a. In the “Label” box, use something descriptive of the new field (e.g., Nickname)
   b. In the “Select a field type” drop-down menu, choose the type of data that will be entered into the field.
   c. Click “Save.”
   d. When the page to edit settings for the field opens, make changes or use the default settings.
   e. Click “Save settings.”

**Editing Content Types**

**NOTICE:** Modifying default content types may have effects on modules and pages throughout your site. Removing fields will destroy all information that is stored in those fields. For this reason, it is strongly encouraged that you only edit the content types that you have created. If you wish to alter the default Event content type, first create a new Event content type (see Creating Custom Content Types) that will then be safe to modify.

1. In the admin menu, select “Structure.”

2. Click “Content types.”
3. Click “manage fields” next to the content type you would like to edit.

**NOTE:** Click “Save” after you format each new field in order to add it to the content type.

To add a new field:

1. Locate the “Add existing field” > “Select an existing field” section to see if the field you want to add has already been formatted.

2. If the field you want has already been formatted, follow the steps below.
   a. Simply select the field. All other fields will be filled in.
   b. Click “Save.”
   c. When the page to edit settings for the field opens, use the default settings.
   d. Click “Save settings.”
3. If the field you want does not already exist, use “Add new field.”
   a. In the “Label” box, use something descriptive of the new field (e.g., Nickname).
   b. In the “Select a field type” drop-down menu, choose the type of data that will be entered into the field.
   c. Click “Save.”
4. A page to edit settings for the field will open. Make changes or go with the default.
5. Click “Save settings.”
6. Use “Add new group” to create a group of fields that are displayed together.
7. To change the order of the fields on your content type, click and drag the move handle on on the left-hand side.
8. Click “Save.”

To edit an existing field:
1. To change settings for an existing field, click “edit” for that field. The settings window will open on the “Edit” tab.
2. Expand the “More settings and values” options.
   a. **Date Entry:** Date and time formatting options can be changed. This field will be used by a user when they create a new Event and enter the date and time of the event.
   b. **Date Field Settings:** Check the box for “Collect an end date” to allow an event that spans several hours or several days.
3. Click “Save settings.”
WORKING WITH FILES AND IMAGES

For advanced users, file organization within your Drupal site can save you time and frustration. As a part of the organization process, you may decide to create new folders. Additionally, you may decide to upload files to or delete files from the server separately from the content creation process.

Creating Folders

Folders can be created either from the user file browser or through IMCE when creating/editing content.

1. To use the user file browser, click “Hello username” (where username is your O-Key shortname) in the top-right corner of the site.
2. Select the “File Browser” tab.
3. Click the folder on the left where you would like to create a subdirectory.
4. Click the “Directory” button, and give your directory a name.
5. Click “Add.”

You should now see the newly-created directory in the navigation area on the left. You can select this folder and upload files to it.

NOTE: You can also create directories while editing any piece of content. To do this, click the image upload button, and then click “Browse server.” This will bring up the IMCE file browser. You can use the steps above to create a directory.

Removing Folders

NOTICE: Many Drupal modules create their own folders, and these folders are used by the theme. Removing any of these folders can cause your site to stop functioning properly. If you are unsure about the use or origins of a folder, do not delete it.

1. To delete a subdirectory, click on the parent folder in the file browser.
2. Click “Directory.”
3. Click the drop-down arrow, and select the subdirectory you want to delete.
4. Click “Delete.”
Uploading Files

Files can be uploaded either from the user file browser or through IMCE when creating or editing content.

To upload files from user file browser:

1. To use the user file browser, click “Hello {username}” (where username is your O-Key shortname) in the top-right corner of the site.
2. Select the File browser tab.
3. Within the file browser, select the folder where you would like to upload the file. Files uploaded to the root directory will be located at http://yoursite.okstate.edu/sites/default/files/filename.ext. All subdirectories will be located in the files folder, so if you have created and selected an images folder, the uploaded file will be located at http://yoursite.okstate.edu/sites/default/files/images/filename.jpg.
4. Click the Upload button in the top-left of the file browser.
5. Drag files from a folder on your computer to the area which says “Drag Files Here.” You may select several files from your computer and drag them as a group to upload multiple files at once.
6. After you have dragged all your files over, click “Upload” for Drupal to begin uploading the files. Your files are not uploaded to the server until you have clicked this button.
7. Wait for Drupal to tell you that all your files have been uploaded. You may now close the file browser.

To upload files from add/edit content page:

1. To upload an image from the content area, in the body area select either the image icon to upload and insert an image or the link button to upload and link to a document.
2. In the dialog box that appears, select the “Browse Server” button.
3. Within the file browser, select the folder where you would like to upload the file. Files uploaded to the root directory will be located at http://yoursite.okstate.edu/sites/default/files/filename.ext. All subdirectories will be located in the files folder, so if you have created and selected an images folder, the uploaded file will be located at http://yoursite.okstate.edu/sites/default/files/images/filename.jpg.
4. Drag files from a folder on your computer to the area which says “Drag Files Here.” You may select several files from your computer and drag them as a group to upload multiple files at once.
5. After you have dragged all your files over, click “Upload” for Drupal to begin uploading the files. Your files are not uploaded to the server until you have clicked this button.
6. Wait for Drupal to tell you all your files have been uploaded. You may now close the file browser.

7. Double-click the newly-uploaded file to go back to the Link or Image dialog. For images, be sure to include an Alternative Text with the image for users of screen readers.

8. Click “OK.”

Deleting Files

Files can be easily deleted from the user file browser.

1. To use the user file browser, click “Hello username” (where username is your O-Key shortname) in the top right-corner of the page.

2. Select the “File browser” tab.

3. Select the file you wish to remove, and click “Delete.”

4. Click “OK.”

Creating Image Styles

Image styles allow you to apply certain actions to an image after it is uploaded/displayed in Drupal. For example, you can crop, rotate, or scale an image. If you establish an image field within a content type or view, you can make sure that your images retain a unified style throughout the site. Image styles can also be used in Views so that you can create a view with all your photos and use an image style to display thumbnails, for example.

1. Navigate to Configuration > Media > Image Styles.

2. Click “Add style.”

3. Give your style a descriptive name, and click “Create new style.”

4. Under Effect, you can apply many different effects to the image. Use the drop-down menu to select the effect you want, and click “Add.”

5. On the next screen, apply the specific settings for the effect you have selected, and then click “Add effect.”

6. This will return you to the edit image style screen. Effects can be used in combinations with other effects, so you may add more effects if you would like. You can drag and drop the effects you have added in the list to reorder them. Effects appearing higher on the list will process first.

7. When you are happy with your image style, click “Update style” to return to the list of image styles. You can now use this image style on the manage display page for a content type or when editing a view.
**SEARCH ENGINE OPTIMIZATION**

Search engine optimization (SEO) is the practice of presenting a website in a way that allows search engines like Google, Yahoo, and Bing to better understand the subject and nature of a site, thereby increasing the chances of someone finding it when searching for similar subjects.

Some SEO methods have already been applied to sites, but for those who wish to go the extra mile, this section describes some modules that can help. If not configured correctly, some of these modules can break web pages or hurt your SEO. **Please use a cautious approach, and use a test environment, if possible.**

**Global Redirect**

Once enabled, if anyone tries to access a page using a non-friendly URL and one exists, they are redirected to the friendly version. For example, if visitors tried to access the page http://example.okstate.edu/node/42, they might instead be redirected to the same page on a different URL (http://example.okstate.edu/content/about-us). Most users can use the default settings for this module. Site administrators who enable this module should make sure all the links used on the site use the friendly URL, or the site could take a performance hit and be slow to load pages. The default configuration of this module is the recommended setting.

**Pathauto**

Some sites already have this module enabled. Pathauto automatically generates friendly URLs for content based on the title of the web page. Site administrators and content administrators should be aware that **when a page title is modified, the URLs to access the page is modified as well.** Editing page titles can unintentionally create broken links. To prevent creating errors when editing a page, turn off the option to “Generate Automatic URL Alias” located under “URL Path Settings.”

Pathauto can be customized if desired, but the default configuration is also acceptable. If you have already created new pages for your site, Pathauto can retroactively generate friendly URLs for those pages. Please refer to the Modules configuration page.
XML Sitemap

This module creates a map of your site in a predictable location for search engines. The map expresses the importance of different pages depending on weights that can be set ranging from zero to one. If the XML sitemap modules are misconfigured, your SEO could be lowered, so use caution, and be honest, search providers often lower SEO scores if they think the site is trying to cheat the system. Not everything on the site is going to be of top importance.

1. Enable the following modules: XML sitemap, XML sitemap engines.
2. Depending on the needs of the site enable the following modules:
   - **XML sitemap custom**: Manually adds pages to the sitemap.
   - **XML sitemap menu**: Automatically adds links from a menu into the sitemap (recommended).
   - **XML sitemap node**: Automatically adds a particular content type to the sitemap (recommended).
   - **XML sitemap taxonomy**: Automatically adds a taxonomy vocabulary to the sitemap. Average sites probably will not need this.
   - **XML sitemap user**: Automatically add “Site Administrator” or “Content Administrator” profile pages to the site map (not recommended).
3. In the admin menu, click “Configuration” under “Search and Metadata.”
4. Select “XML sitemap,” and click the “Settings” tab on the right side of the screen.
5. Set the minimum sitemap lifetime to 1 day or more, and save the configuration.
6. Configure each of the enabled XML sitemap modules according to your needs, using the side tabs at the bottom left of the page be sure to set appropriate importance levels for your content. To manually add a specific page, switch to the “Custom links” tab at the top of the page.
7. On the “Frontpage” tab on the bottom half of the page, set the “Change frequency” to roughly how often the front page of the site changes.
8. Change to the “Search Engines” tab, and enable Bing and Google. Do not submit more often than once a day. A weekly submission will be more than acceptable, and only submit when the sitemap has been updated. When you are finished, save the configuration page.
9. On the “List” tab, check the box for your sitemap (https://<your site>/sitemap.xml), and click the “Update” button.

To see what your sitemap looks like, go to http://<yoursite>.okstate.edu/sitemap.xml.
Google Analytics

Google offers a service free of charge that monitors and logs traffic to websites. This is an excellent way to see who is visiting your site and possibly to find out why you have visitors coming to your site. Using this information, you can better tailor your site for visitors. It is highly recommended that you set this up using a Google account owned by your college, department, or organization.

1. Set up a Google Analytics (GA) account at http://www.google.com/analytics/.
2. Find your GA Web Property ID. It should be in the form UA-xxxxxxxx-yy.
3. On your website, click “Configuration” in the admin menu. On the next page under the “System” section, select “Google Analytics.”
4. Enter your Web Property ID, and save the configuration.

Site Verification

Site verification is a way of proving that you own a website. This is a step required to use Google Webmaster Tools. This is useful because Webmaster Tools can show you different issues they may find with your site, and make sure Google is classifying your site under the correct subject matter.

1. Using your organization’s Google account, sign up for Webmaster Tools. Google will give a page, or code to place on your site.
2. On your website, go to “Configuration” > “Verifications.”
3. Add a new verification, and select Google as the search engine.
4. Enter the code or upload the file provided by Google.
5. Go to the Google Webmaster Tools, and have Google check the site for the verification piece.
6. Once verified, go through the Webmaster Tools to check for any issues or configurations that need to be set.

The effects of SEO will not be immediate. It could take a few weeks or even a month before they boost the search rankings. It is a good idea to see what your search ranking is before and after SEO changes, and keep track of what changes you have made. For more information, refer to the Google Starter Guide.
**addthis**  
Creates a block that enables visitors to easily share pages on social sites.

**block_class**  
Adds html classes to blocks. Go to Structure > Blocks and choose the block you want to add classes to.

**calendar**  
Adds templates to the views module to easily create calendars as well as a calendar display format to view. It operates using the date field on content types.

**captcha**  
Adds simple tests to see if the user is a person (captchas) when filling out forms on the website. It has two different modes: a simple math mode and an image mode. Administrators can determine which forms should have the test.

**chart**  
Provides APIs to Google Chart. Currently, it is only required by the Google Analytics module.

**ckeditor**  
WYSIWYG editor.

**ckeditor_link**  
An add-on to ckeditor, allowing you to easily create internal paths to media like images and documents.

**colorbox**  
Creates a lightbox using jQuery that will display images or pages like forms. It also creates a display type for images. An example usage for custom html block in Drupal is below:

```html
<a class="colorbox" href="/sites/default/files/slideshow-images/2.jpg"><img alt="" class="colorbox" height="333px" src="/sites/default/files/slideshow-images/2.jpg" width="500px" /></a>
```

**context**  
Enables the use of blocks in different areas of a site. It is similar in some ways to panels. An administrator defines a set of conditions such as content type, path to the page, and/or other contexts which must be met in order for the context rule to apply. It can be used to create a section of a site or just a page. The administrator then defines set of reactions to take when the rule is in effect such as changing the theme, breadcrumb, or menu.
**ctools**
A major contribution to Drupal – just about every site needs Chaos Tools (CTools). About half of all modules rely on ctools.

- **Stylizer**: Creates styles for some modules such as panels or mini panels
- **Custom rulesets**: Currently no permissions set
- **Custom content panes**: Similar to custom blocks, only for panels

**date**
Adds a date api to Drupal; adds a date field to add to content types; adds a selector for selecting dates.

**ds (Display Suite)**
Makes it easy for administrators to change how nodes and content creation forms are displayed by editing the content type without getting into the heavy details of CSS. It is very powerful and can make very logical layouts. Currently, enabling a certain module crashes the front end (anonymous user).

**dynamic_background**
Makes it easy to use images as backgrounds for various parts of the site. They can be set up for one across the entire site or for specific pages, blogs, nodes, users, views, or defined using a context. Be careful using this because loading many background pages can cause page loads to take longer and distract from the information presented on the site.

**entity**
Provides an API for other modules to interact with entities.

**features**
A module that packages, views, context rules, content types, and a few other things that collectively create a feature of some sort for a site feature such as an article archive, image gallery, or news feature. This module makes it very easy to move from one site to another. The down side is that it requires file level access to install, which users on secure templates do not have access.

**field_group**
Enables adding a new field to a content type, which can group related fields in nodes into further subgroups.

**globalredirect**
Once the alias module is enabled, there exist two paths to access exactly the same page. For example, pistolpete.okstate.edu/node/20 and pistolpete.okstate.edu/content/fall-picnic could both link to the same page. This module (Global Redirect) takes any requests to the non-friendly page and redirects the visitor to the friendly URL.
google_analytics
A website tracking service that keeps track of things such as page views, duration of views, and downloads of media. This module enables the service for the site, but needs a Google account to tie the information to. The Global Redirect Module is suggested, but not required.

google_analytics_reports
Provides the interface to access Google Analytics API statistics.

imagecache_actions
A collection of functions for image manipulation such as resizing and cropping of images uploaded to a site. This module extends the functionality offered by adding options to do watermarking, overlays, text overlay, color-shifting, darken, brighten, alpha blending, canvas manipulation, converting formats, and more.

imce
Another WYSIWYG available; this one is enabled by default in OSU’s Drupal Secure Template.

jcarousel
A jQuery plugin for controlling and displaying a list of items. This is good for doing things like viewing galleries.

jquery_update
A very simple module and does exactly what you think it would. It upgrades the version of jQuery in the Core. Don’t do this unless you know what you are doing. Updating jQuery could break features you already have.

ldap
A module that integrates with LDAP authentication, which gives the site a way to interact with OSU users and authenticate them.

libraries
An API for developers to work with external libraries in Drupal.

link
A module that creates a custom ‘link’ field type for content types.

linkchecker
A module that will scan the site for broken links in nodes, blocks, and fields. If any are found it reports them. This is very useful when sites will be linking to others. Reported links can be found in /admin/reports/logs/linkchecker.

location
A very large package that includes many modules relating to locations. It can use Google Maps to set the latitude and longitude of events. It adds a location field for content types.
**login_destination**
An administrator can set the destination a user will be sent to after login. Sending users to the dashboard or the content management section of a site is much more useful than the user page they are sent to by default.

**media**
A media API framework provided for working with media so modules can easily work together.

**menu_attributes**
A module that adds a section to node creation so that when a new node is created it has a default menu to be added to. This makes it very simple for Content Administrators or people who know very little to easily add stuff to menus automatically.

**menu_block**
A menu block module that allows you to create extra blocks from menus, starting from different levels of the menu.

**menu_import**
Allows administrators to import and export menus.

**nice_menus**
Menus that are used to create the drop down you see on the Drupal Black template. It takes a regular menu in the configuration and creates the stylized drop down menu when you mouse hover over it.

**node_export**
Another module that does exactly what you think it would: Export/import nodes. Offers support for the Features module.

**nodequeue**
Allows you to create arbitrary lists of nodes, adds them, and puts them in a view. This module is used in the initial site you get when you start with a Drupal Secure install.

**oauth**
OAuth is an open standard for authorization. The module is mostly used by other modules.

**panels**
In some ways, panels is similar to Display Suite. It allows users through a GUI to create custom layouts. It works on pages, nodes, and can create blocks.

**pathauto**
Another great one to use module for sites. It automatically creates friendly URLs for nodes when they are created, so there is one less thing the Content Administrator has to remember to do. Currently we are having some trouble with this module, so enabling it might cause some issues.
quicktabs
Quicktabs creates a block which creates tabs that can contain views, blocks, nodes, or other quicktabs. It also supports passing arguments from the URL.

role_delegation
Allows administrators to assign new roles (e.g., site administrator, content administrator) to other users.

scheduler
Allows you to schedule when a node should be published or “unpublished.”

search404
When a page is requested from the site that does not exist, the site will return a 404 code, and take the url and use it as a search term. It is an excellent way to try to get users the content they are looking for when a site has been redone.

socialmedia
If the site has social media accounts associated with it, this module integrates them.

special_menu_items
Sometimes a separator is needed in a menu or a placeholder (like a container). Use the tags <nolink> or <separator> in the menu path to use.

taxonomy_manager
Creating large taxonomies can be annoying in Drupal, especially when creating a new site. This manager makes adding, removing, and editing a large collection of taxonomy terms much easier. This is a must if the site is relying heavily on taxonomies.

taxonomy_menu
Adds links to taxonomy terms to a menu.

token
In Drupal, sometimes tokens are used to insert customized text into modules or pages such as [user] or [site name] to insert the user name and site name, respectively. The token module creates more valid tokens to use.

uuid
Universally Unique ID (UUID) provides behind-the-scenes functionality for other modules.

uuid_features
Working with the Features module, this one allows you to export nodes.
views
A must for any Drupal site. It features a UI that creates database queries to generate pages. This is a very powerful module. It can be used to create calendars, upcoming events, lists, and a host of other features. It is fairly easy to use, but hard to master.

viewsAccordion
Adds a display format which allows each result in the view be compressed and uncompressed with a click using a slide animation, making each result take less space on the screen.

viewsSlideshow
Adds the slideshow display format. It is used by the slideshow on the front page of an initial install of the OSU Drupal Secure Template install.

webform
An excellent module to create a new content type for creating forms. You can also create contact forms, surveys, and much more. It can send emails on completion to the user or a fixed person. If anonymous users are exposed to a webform, then a captcha should be used to reduce chances of abuse.

webformValidation
Creates additional rules to validate forms like making sure a phone number has enough digits. It creates an extra tab on the webform edit page called “form validation.”

widgets
Another tool for integrating code from third-party sites such as social media share links to your site. Usually this stuff comes from the “copy and paste this onto your site” stuff from a website. It also has a host of widgets already installed. It is very similar to the “addthis” module.

wysiwyg
A WYSIWYG for Drupal.

xmlSitemap
Creates a site map in xml form and puts it in an expected place. This lets web crawlers know what pages they should view and how often they are usually updated. Setting this up is essential for search engine optimization. Initially the main page is the only thing added to the sitemap.

zenophile
Only people with file access really need to use this. It is a developer’s module that assists with creating templates.