Getting Started with Drupal

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Version 2.0

> ***Tutorial Objective:*** The objective of this tutorial is to learn some of the basics about installing and configuring a Drupal website. Drupal is a popular Open Source Content Management System, with a large and active developer community. There are many modules and themes that can add functionality. The system is very flexible and can be tailored to meet most needs.
>
> During this tutorial, you will learn how to install the Drupal software and setup a basic website. It will cover setting up a theme, configuring site information, adding modules for functionality, creating menus and navigation buttons, setting up blocks and creating your first page of content.

> ***Note:*** To do this tutorial you'll need the latest copy of Drupal (currently v5.1). Go to http://www.drupal.org and download the latest version. The documentation for Drupal can be found at http://drupal.org/handbooks For more detailed information on Drupal installation, consult INSTALL.txt in the Drupal distribution.

Step One: Installing Drupal

1) Drupal requires that a web server, as well as a DBMS and PHP scripting are installed prior to use. Drupal recommends using Apache, MySQL and PHP5. Locate where your webserver stores web pages (the server's document root or your public HTML directory). For example, is it under \htdocs or \www ?

   a. Extract or unzip Drupal into that directory. A new directory called drupal-x.x/ where x.x is the version number will be created. All the files and directories needed to run Drupal will be copied into this directory.

   b. Rename the Drupal directory to your site name (for example, ecomsite or yourname).

2) Create the database that Drupal will need for your website.

   a. Go back to your localhost main webpage. Start PhpMyAdmin and in the box under "Create new database" type the name of your database – make it the same name as your site name above.

3) Now you are going to run the Drupal installation script. Type the url http://localhost/yoursitename (replacing *yoursitename* with the site name you gave your system in #1b above).

    a. Follow the instructions and enter in the appropriate information as follows:
    b. Database type = mysql
    c. Database name = the name you gave the database in #2 above
    d. Database host = localhost
    e. Database username and password – you will need to know the existing passwords or if is the first time you are using MySQL, you'll need to add a user through PhpMyAdmin.

If everything went well, there should be a message to say that Drupal has been installed. You can click on the link to go to your website.

Step Two: Creating the First User Account

4) In the next step you will begin configuring your website.
    a. Before anything else, you should create the FIRST Account. This will be your administrator account. You need an administrator account, because only those users who are administrators can configure and modify the website. You'll need to login as the administrator every time you want to make changes to your website.

    b. Click on 'create the first account' and fill in the information. Write it down so you don't forget. When you submit the form, you will probably get an error in red at the top of the screen. This is because the mail system is not installed on your system.
    c. Read the green box in the middle of the screen. The system will give you a default password, so you need to write it down. If you don't like the password that was given to you, then enter one you'll easily remember in the boxes.
    d. Read the rest of the information on the page, and add any information you want. You can always go back to this page later and fill in things like your signature.
    e. Remember to SUBMIT the page to save your changes. Everything in Drupal is forms based, so if you don't submit the page/form, your changes will be lost.

5) Click on the Home link to return to the home page.

Step Three: Configuring Your Drupal Site

6) Now it's time to configure your website.
    a. Click on Administer on the lefthand menu bar.
    b. Take a look at the options available. There are several categories for configuration.
       o Content Management
       o User Management
       o Logs
       o Site Building
       o Site Configuration

> o Read the headings to find out what types of information are configured in each section.

7) First you will modify the **basic** site settings. Click on *Site Information* under the Site Configuration Section.

    a. You should see the following screen.
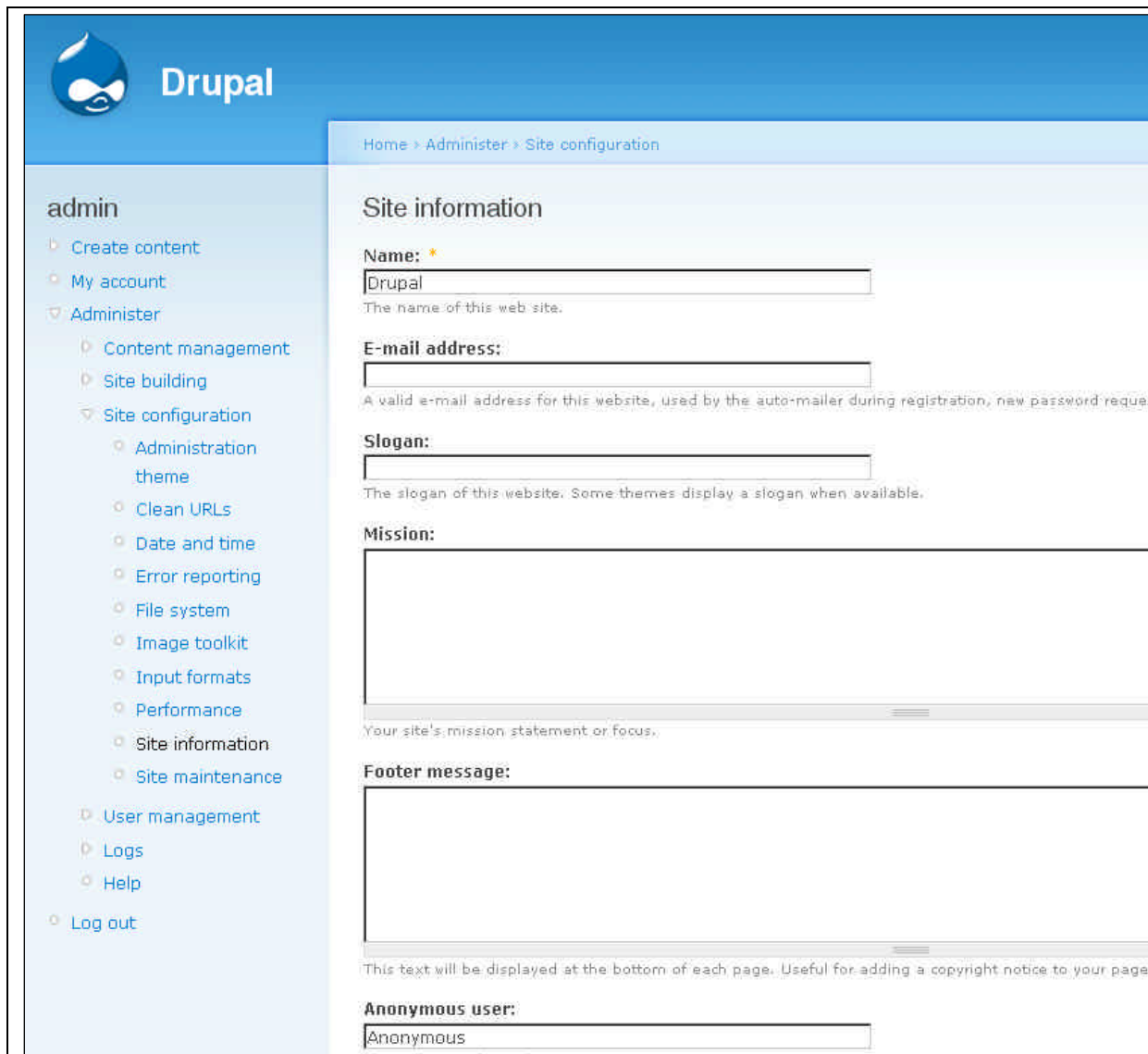
    b. Fill in the following information about your site:

- Site name
- The administrator's email address
- A slogan (if you have one) – like a sub-title
- A mission statement, focus, goals or objectives of the website (some themes will display this on the front page of your website)
- A footer message (to be displayed at the bottom of every page on your site).
- Save your configuration. Notice the site name has changed in the heading.

Step Four: Changing Your Site Theme

Now you are going to change the way the website looks.

8) Click on Administer, then Themes (under the Site Building section).

- By default, only a few themes are installed. You can download more from http://drupal.org/project/Themes

9) As an example, you will modify the **Garland** theme. You can go back later and install more themes and see which ones suit your website best. But for now, make sure the *Enabled* box is checked and the *Default* choice is highlighted next to the Garland theme. Click on save configuration at the bottom of the screen.

10) Now, click on configure next to the Garland theme. Read the options you can modify to customize your website. Most themes offer these options as standard, and some themes have more options to select from.

11) Select a **Color Scheme**. Find one that appeals to you.

12) Under **Toggle Display**, click on the boxes next to the page elements you would like displayed on your website.
- For example Logo, Site name, Site slogan, Mission statement, Search box, and Shortcut icon (the little icon displayed on the web browser's navigation toolbar).
- You can also select whether to allow User pictures in posts and in comments

13) Next you can **upload a logo** for your website. Toggle the box in front of "use default logo" to disable the default Drupal logo. Upload a new logo for your website (initially

get an image from openclipart.org - later you can create a more appropriate logo for your website).

14) Now you can specify whether to use a shortcut icon. Again, you can upload either a new tiny image or try your existing logo.

15) Save your configuration.

16) Every time you change a theme, you'll have to configure the new theme.

17) You can use multiple themes on a website and even allow users to decide on which theme they would like to see.

18) **Installing new themes**

As mentioned before, you can download new themes from http://drupal.org/project/Themes
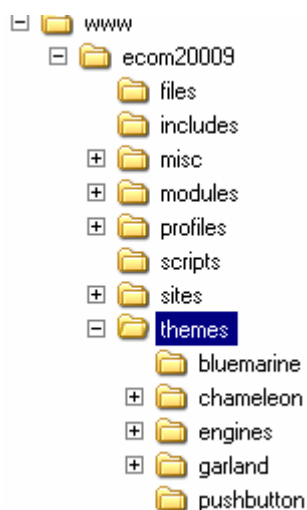
To install a theme, just uncompress the downloaded file into the \drupalwebsite\themes subdirectory. The theme will create a new directory. Please refer to the diagram on the left.

Notice under the themes directory, the themes bluemarine, chameleon, garland and pushbutton are installed. Some themes require a particular engine to be installed for a theme to work properly and these are contained in the engines subdirectory.

That's it for installing themes, very easy.

Now go back to the Administer – Themes webpage and the new themes you just installed should appear on the screen for you to configure.

19) **Basic theme configuration.** To make the theme unique for your website, you can modify the Cascading Style Sheet code. The CSS files are located in the themes subdirectory. Before continuing, you will need to understand CSS. There are good tutorials online. For example, try the tutorials at http://www.w3schools.com/css/ or http://www.csstutorial.net/
   a. After gaining an understanding of CSS, read through the CSS attributes in your theme and become familiar with what is occurring.
   b. Try changing some colors (for a color chart refer to http://www.somacon.com/p142.php or http://www.seoconsultants.com/css/colors/web/safe/ . Try to use "web safe" colors on your site.
   c. CSS is very flexible. You might want to look at lots of themes to see what others have done, and then copy code from other themes or modify your theme to give it a unique look. For example, you could change the number of columns, position of headers and footers, or whether the site positions its content in a fluid versus static way.

Step Five: Adding Content

20) Before going any further, let's add some content to your website. In the following steps, you will create the front page.

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a) Click on **Create Content** in the left-hand menu. Note the different types of content that are currently enabled.

Home

Create content
Choose the appropriate item from the list:

Page
If you want to add a static page, like a contact page or an about page, use a page.

Story
Stories are articles in their simplest form: they have a title, a teaser and a body, but can be extended by other modules. The teaser is part of the body too. Stories may be used as a personal blog or for news articles.

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b) Click on *Page* to create your first page on your website. Give your page a title and write some body. Refer to the diagram below.   Note that you can type the body in plain text or use html tags, css or php.

Submit Page

Title: *

Welcome to my E-Commerce Website

Body:

Here you write all the information about your website.

<h1>You can write it in plain text, or you can use HTML and even CSS or PHP code.</h1>

<img src="/files/first.jpg" alt="First page">First page.
Second page.

Third page.

<hr>

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c) Scroll down the screen until you see the following:
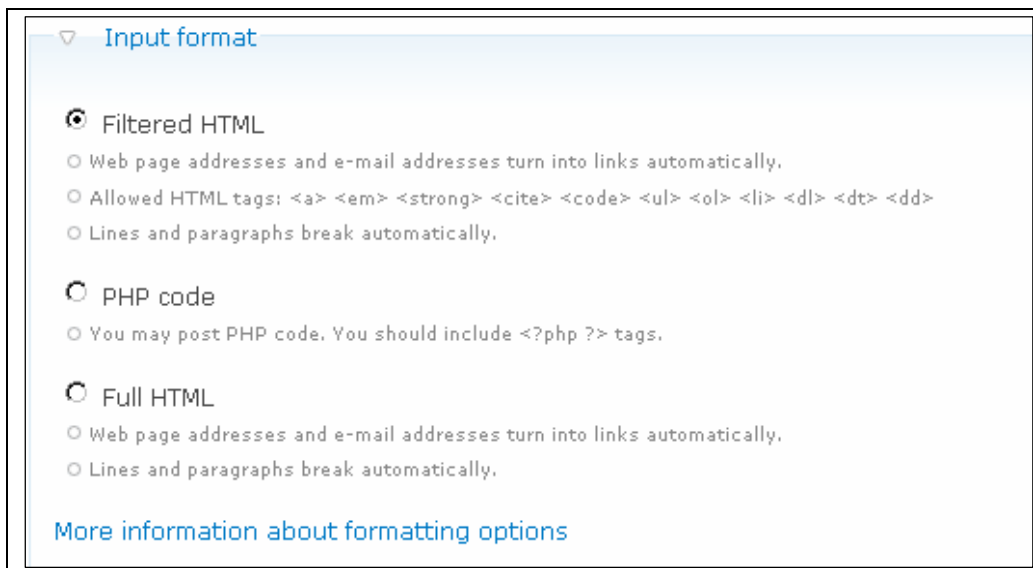
- By default, you can select from 3 options (you can also add one for plain text as well). If you use html or css in the page body, then use Full HTML mode, otherwise Filtered HTML (the default) is probably okay.

d) Scroll down some more and expand each section to read the options.
e) When you get to the bottom of the screen, look closely at the Publishing Options.
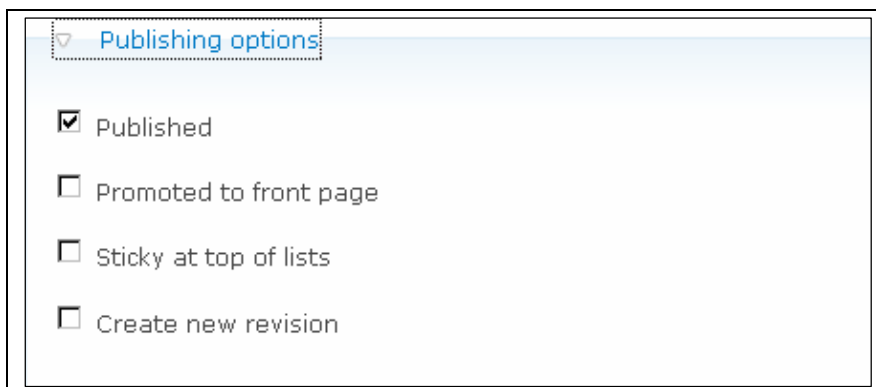
- There are four options:
- **Published:** You can create content ahead of time and publish or unpublish it without deleting it from the database.
- **Promoted to front page:** Since you want to make this page the front page of your website, tick the "Promoted to front page box". This will display the content on the first page.
- **Sticky at top of lists:** If you want this node to appear first in any lists, forums, blogs or first on a page, enable this box.
- **Create new revision:** If you make substantial changes to an existing page, you might want to keep past versions to keep a history.

f) Save your changes and view the new home page.

Step Six: Adding Functionality with Modules

21) Now it's time to add some extra functionality beyond the default setup. Click on Administer, and then under Site Building, click on **Modules**.

   a) Read through the list and discover the wide variety of modules that are supplied by default.

   b) Enable Blog, Book and Poll. Save your configuration.

   c) Click on Create Content on the left-hand menu and you'll see that you can now add a Blog entry, a book page and a poll. You can try these out now.

Home

Create content
Choose the appropriate item from the list:

Blog entry
   A blog is a regularly updated journal or diary made up of individual posts shown in reversed chronological order. Each member of the site may create and maintain a blog.

Book page
   A book is a collaborative writing effort: users can collaborate writing the pages of the book, positioning the pages in the right order, and reviewing or modifying pages previously written. So when you have some information to share or when you read a page of the book and you didn't like it, or if you think a certain page could have been written better, you can do something about it.

Page
   If you want to add a static page, like a contact page or an about page, use a page.

Poll
   A poll is a multiple-choice question which visitors can vote on.

Story
   Stories are articles in their simplest form: they have a title, a teaser and a body, but can be extended by other modules. The teaser is part of the body too. Stories may be used as a personal blog or for news articles.

22) ***Downloading and Installing new modules.*** There are numerous modules which have been written by Drupal developers. They are located at http://drupal.org/project/Modules . Go to the Drupal website and take a look at the modules that are available.

   a) Now, you are going to add the **Image** module so you can upload images and add them to your website content.

      ▪ Download the Image module from http://drupal.org/project/image . Make sure you get the appropriate version for the Drupal software you are running.

      ▪ Extract the file you just downloaded into *yoursitename*\\modules

      ▪ Click on Administer, then click on Modules (under the section Site Building). Scroll down to the bottom, and you should see options for the Image Module (similar to the following diagram).

b) Tick the four boxes that are associated with the **Image** module and save your configuration. Please note that the description tells you information about what the module does, plus any requirements or dependencies on other modules. When installing new modules, always make sure you have any other required modules, or the installation will fail.

c) Now you will create an **image gallery**. But, first you need to configure the Image module. Click on *Administer, Site Configuration* and you will see some new options that are associated with the Image module you just installed. For example, the following are added when you installed the Image module:

d) Click on each of the Image Module settings (as listed above) and modify if necessary. Make sure that for Image Attach, the default is set to Enabled (so images can be attached).

e) Click on **Administer, Content Management** and click on **Image Galleries**. Click on **Add Gallery** to get to the following screen:

Home > Administer > Content management

Image galleries   List   Add gallery

Gallery name: *

Product Pictures

The name is used to identify the gallery.

Description:

Photos and images of products for sale on this website.

The description can be used to provide more information about the image gallery.

Parent: *

\<root\> ▼

Image galleries may be nested below other galleries.

Weight:

0 ▼

When listing galleries, those with with light (small) weights get listed before containers with heavier (larger) weights. Galleries with equal weights are sorted alphabetically.

Submit

f) Give your gallery a name, provide a description, and since this is the first gallery, its parent is \<root\>. You can create further image galleries and categorize them and link them together in a hierarchical format. Also, you can give your image gallery a weighting. This means when multiple galleries are listed, the galleries with smaller weights are listed first, and higher-numbered weights are listed later in the list. Save your configuration.

g) Now you can upload some images into your gallery. Click on **Create Content** on the left-hand menu and Click on **Image** to add an image to your gallery.

h) Fill in the appropriate information (title and body text), select the image gallery you just created from the pull-down list and click on Browse to find an image to upload. Click on **Submit** to save the information.

Home › Create content

Submit Image

Title: *

T-Shirt

Image:

Z:\openclipart\clipart\people\clothing\t-shirt_   Browse...

Click "Browse..." to select an image to upload.

Image Galleries:

<none>

<none>
Product Pictures

▷ Input format

23) After uploading the image, the node will be displayed. If you notice any errors, you can click on Edit to modify the image. In the next section, you will add some navigation to easily get to your new image gallery.

Home

T-Shirt   View   Edit   Outline

The *Image* has been updated.

Thu, 04/19/2007 - 00:09 — admin

This is a black t-shirt for sale. It comes in sizes S, M, L, XL. Cost: $5.00
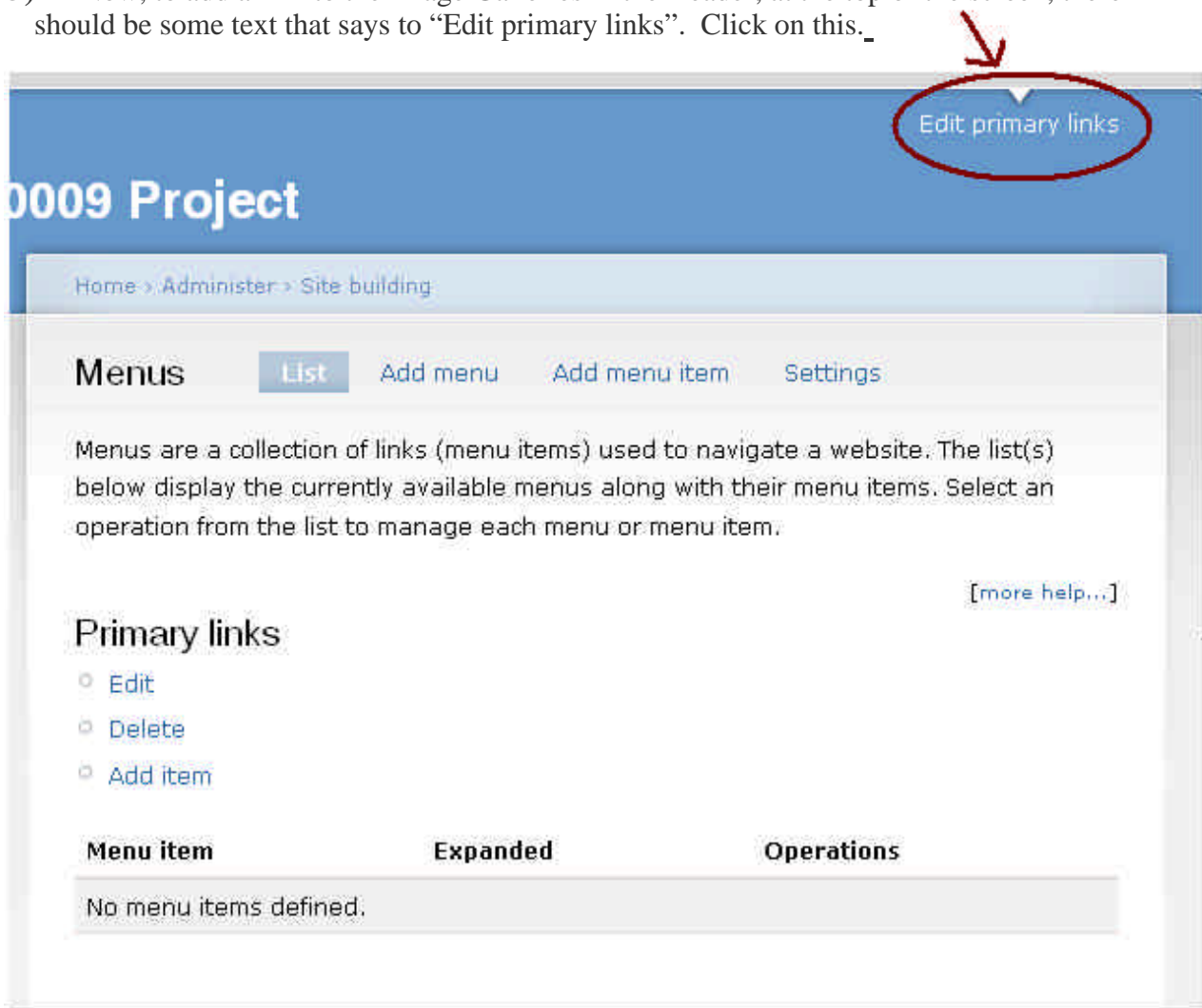
Add new comment   thumbnail   original

Step Seven: Adding Menus and Navigation

24) To add the Image Galleries to the left-hand menu, click on Administer, and Under Site Building, click on Menus.

   a) Halfway down the page, under Navigation, look for Image Galleries

Forums (disabled)		enable	
Image galleries (disabled)	No	enable	reset
Polls (disabled)	No	enable	

   b) Notice how it is currently disabled. Click on enable. Review the information on the screen and Submit.
   c) Look at the left-hand menu. Image Galleries should appear as an option. Click on it and you should be taken to the page that lists the image gallery you created in a previous step.
   d) Look at the URL in the navigation toolbar of your browser. Write down the url for the image galleries page, it should be *yoursitename/ ?q=image.* You will use this information in the next step.

25)   Now, to add a link to the Image Galleries in the Header, at the top of the screen, there should be some text that says to "Edit primary links". Click on this.

- To modify the primary links, click on Add item under Primary Links. Fill in the following information to create a primary link to the Image Galleries.

Edit menu item

Title: *

    Image Galleries

The name of the menu item.

Description:

    A link to our online galleries

The description displayed when hovering over a menu item.

Path: *

    image

The path this menu item links to. This can be an internal Drupal path such as *node/add* or an external URL such as *http://drupal.org*. Enter *<front>* to link to the front page.

☐ Expanded

If selected and this menu item has children, the menu will always appear expanded.

Parent item:

    Primary links ▼

Weight:

    0 ▼

Optional. In the menu, the heavier items will sink and the lighter items will be positioned nearer the top.

Note: that the Path to the image gallery is "image". Remember in the previous step you found that url for the image gallery was "?q=image". You don't need to put the "?q=" in the path, this will be assumed.

26) In future when making menu items, you can have links to Internal nodes, External nodes or websites or the front page.

For example:
<front> - links to the front page of the website
node/add - takes you to the create content page
node/1 - takes you to the first node you created
image - takes you to the image gallery index list
image/tid/1 - takes you to the first image gallery you created
http://www.abc.com - takes you to abc.com!

27) Move around your website, clicking on different pages while noticing the URL at the top.
  a) Create some Menu Items with these urls until you become familiar with how it works.
  b) Add a link to your home page in the Primary Links.

Step Eight: Configuring Blocks

28) In Drupal, the website screen is split into regions. For example, header, footer, and left and right sidebars. Modules generate blocks, but they can also be created manually.

29) Click on Administer, Site Building and Blocks to view the blocks that are currently enabled.

Block	Region	Weight	Operations
Left sidebar			
User login	left sidebar	0	configure
Navigation	left sidebar	0	configure
	\<none\>		
	left sidebar		
	right sidebar		
Disabled	content		
	header		
Active forum topics	footer	0	configure
Book navigation	\<none\>	0	configure
Latest image	\<none\>	0	configure
Most recent poll	\<none\>	0	configure
New forum topics	\<none\>	0	configure

a)   As you can see, only the User login and Navigation are enabled in the Left Sidebar.

b)   Move the User Login to the Header by using the pull-down list.

c)   Enable "Who's Online" and "Who's New" and put them in the left sidebar.

d)   Click on "Save Blocks" at the bottom and view the changes on the screen.

30) You can also use Blocks to create and place a new Menu for navigation.

    a) Click on Administer, Site Building and Menus. Click on "Add Menu" at the top to create a new menu. All you have to do at this point, is give your menu a name, eg. SHOPPING and save the menu.

    b) Click on "Add Menu Item" to add an item to your SHOPPING menu. For now, just point to the Image Gallery you created previously. Remember the path = image.

31) The menu module created a new block, called SHOPPING. Now you have to enable it and tell Drupal where to display it.

    a) Back at the Blocks screen (Administer – Site Building – Blocks), look for the block you just created in the previous step. Use the pull-down menu to select in which region the new block should display. For example, put it in the left-sidebar. Click on Save Blocks.

    b) Click on the Home button and review your website. A menu item for SHOPPING should appear in the left-sidebar.

Step Nine: Learn Some More!

Okay, that's it for now. So far, you have learned a lot about Drupal in this session. You now know how to install the Drupal software, setup a theme, configure site information, add modules for functionality, create menus and navigation buttons, setup blocks and create content. Your next step is to download themes and modules from the Drupal website (http://www.drupal.org).

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