



South Carolina Revenue and Fiscal Affairs Office

Drupal Administration & Advanced Users

Presented by GovWebworks.



Blocks

- **Blocks** are boxes of content rendered into an area, or region, of a web page (such as "User Login") that can be displayed in **regions** (such as footer or sidebar) on your page.
- This functionality is provided by the **Block module**, which is a part of Drupal 8 core.
- Drupal 8 also introduces another module apart from Block that allows the creation of custom blocks through the user interface and it is "**Custom Block**" module.



The screenshot displays the Drupal 8 administrative interface. The top navigation bar includes 'Manage', 'Shortcuts', 'Search', and the user name 'alison'. Below this, a secondary navigation bar lists various modules: Content, Structure, Appearance, Extend, Configuration, People, Reports, Help, and Elemental. The main content area shows a 'Block layout' page with several regions highlighted in yellow: 'Header', 'Breadcrumbs', 'Above Content Full Width', 'Above Content', 'First Sidebar', 'Content', 'Second Sidebar', 'Below Content', 'Footer 1', 'Footer 2', 'Footer 3', and 'Bottom'. A 'Back to Top' button is visible in the bottom right of this section.

Below the main content area, the 'Custom block library' is shown. It has tabs for 'Block layout', 'Custom block library', and 'Block Visibility Groups'. The 'Custom block library' tab is active, showing a form to add a new block. The form includes a 'Block description' text field and a 'Block type' dropdown menu currently set to '- Any -'. An 'Apply' button is located below the form.

Below the form is a table listing existing custom blocks:

BLOCK DESCRIPTION	BLOCK TYPE	UPDATED	OPERATIONS
Footer Links	Header and text block	05/18/2020 - 08:34	Edit
Health and Demographics Division	Header and text block	04/13/2020 - 15:16	Edit
Geodetic Survey Section	Header and text block	04/13/2020 - 15:16	Edit
Main Office	Header and text block	04/13/2020 - 15:15	Edit

Views

- A **view** is a listing of content on a website. The core **Views module** handles the display of views, and the core **Views UI module** allows you to create and edit them in the administrative interface.
- When you define views, you are interested in taking data from your website and displaying it to the user.
- **Views pages essentially look for content that is maintained elsewhere.**

The image shows two screenshots of the Drupal Views administration interface. The top screenshot displays the 'Views' overview page, and the bottom screenshot shows the configuration page for the 'Bulletin (All) (Content)' view.

Views Overview Page:

- Navigation: Back to site, Manage, Shortcuts, Search, alison
- Menu: Content, Structure, Appearance, Extend, Configuration, People, Reports, Help, Elemental
- Section: Views ☆
- Buttons: List, Settings
- Breadcrumb: Home » Administration » Structure » Views
- Buttons: + Add view
- Filter: Filter by view name, machine name, description, or display path
- Section: Enabled

VIEW NAME	MACHINE NAME	DESCRIPTION	DISPLAYS	OPERATIONS
Bulletin (All)	bulletin_all_		Block	Edit ▾
Bulletin(Media)	bulletin_media_		Block Block Block Block	Edit ▾
Bulletin (Topics)	bulletin		Block	Edit ▾

- Left sidebar: Calendar of Events, Content, Custom block library

Bulletin (All) (Content) Configuration Page:

- Navigation: Back to site, Manage, Shortcuts, Search, alison
- Menu: Content, Structure, Appearance, Extend, Configuration, People, Reports, Help, Elemental
- Section: Bulletin (All) (Content) ☆
- Breadcrumb: Home » Administration » Structure » Views
- Section: Displays
- Buttons: Block, + Add
- Display name: Block
- Buttons: Edit view name/description, Duplicate Block
- Section: TITLE
- Title: None
- Section: FORMAT
- Format: Unformatted list | Settings
- Show: Content | Bulletin item
- Section: FIELDS
- The selected style or row format does not use fields.
- Section: FILTER CRITERIA
- Content: Published (= Yes) Add ▾
- Content: Promoted to front page (= Yes)
- Content: Changed (>= -30 days)
- Section: SORT CRITERIA
- Content: Changed (desc) Add ▾
- Section: BLOCK SETTINGS
- Block name: None
- Block category: Lists (Views)
- Allow settings: Items per page
- Access: Permission | View published content
- Section: HEADER
- Buttons: Add
- Section: FOOTER
- Buttons: Add
- Section: NO RESULTS BEHAVIOR
- Buttons: Add
- Section: PAGER
- Use pager: Display a specified number of items | 6 items
- More link: No
- Link display: None
- Buttons: Save, Cancel
- Section: ADVANCED



Webforms

- **Webform** is the module for making forms and surveys in Drupal.
- After a submission, **customizable e-mails** can be sent to administrators and/or submitters.
- Results can be **exported into Excel** or other spreadsheet applications.
- Webform also provides some basic statistical review and has an extensive API for expanding its features.

The screenshot shows the Drupal administration interface for the Webforms module. At the top, there is a navigation bar with 'Back to site', 'Manage', 'Shortcuts', 'Search', and the user name 'alison'. Below this is a secondary navigation bar with tabs for 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', 'Reports', 'Help', and 'Elemental'. The main heading is 'Webforms' with a star icon. Underneath, there are sub-tabs for 'Forms', 'Submissions', 'Options', 'Configuration', 'Add-ons', and 'Help'. A breadcrumb trail reads 'Home » Administration » Structure » Webforms'. A message states: 'The Forms management page lists all available webforms, which can be filtered by the following: title, description, elements, category and status.' There is a 'Watch video' button. A '+ Add webform' button is also present. A 'FILTER WEBFORMS' section includes a search box 'Filter by title, description, elements, user naD', a dropdown menu set to 'All [2]', and a 'Filter' button. Below this, it says '2 webforms' and displays a table with columns: TITLE, DESCRIPTION, CATEGORY, STATUS, AUTHOR, RESULTS, and OPERATIONS. The table contains two rows: 'Contact' (Basic email contact webform.) and 'Geodetic Data' (Webform to upload geodeticData). The 'Geodetic Data' row is highlighted, and a modal window is open over it.

The screenshot shows the submission page for the 'Geodetic Data' webform. The title is 'Geodetic Data'. There are tabs for 'View', 'Test', 'Results', 'Build', 'Settings', and 'Export'. The form fields include: 'Subject' (text input), 'Email' (text input), and 'Message' (text area). Below the form is an 'Upload Files' button. Underneath the button, there are instructions: 'One file only.', '48 MB limit.', and 'Allowed types: gif jpeg png bmp eps tif pict psd txt rtf html odf pdf doc docx ppt tar zip.'



Taxonomy

1. **Taxonomy**, a core module, gives your sites use of the organizational keywords known in other systems as categories, tags, or metadata. It allows you to **connect, relate and classify your website's content**. In Drupal, these terms are gathered within "vocabularies". The Taxonomy module allows you to create, manage and apply those vocabularies.
2. Drupal 8 has the **ability to add taxonomy fields to vocabularies and terms**.
3. Taxonomy can be used in workflow, to customize defined sections of your website with different themes or to display specific content based on taxonomy terms. Although taxonomy can be used in various ways, probably the **most important use of taxonomy in Drupal is to relate content**.
4. Taxonomy should be driven by the business requirements of your website, with an eye towards possible future functional expansion.

Taxonomy - Vocabulary vs Terms

The screenshot shows the 'Taxonomy' management page. At the top, there is a navigation bar with 'Back to site', 'Manage', 'Shortcuts', 'Search', and the user 'alison'. Below this is a secondary navigation bar with icons for Content, Structure, Appearance, Extend, Configuration, People, Reports, Help, and Elemental. The main content area has a breadcrumb trail: 'Home » Administration » Structure » Taxonomy'. A text block explains: 'Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms "Apple" and "Banana".' Below this is a '+ Add vocabulary' button. A table lists various vocabularies with columns for 'VOCABULARY NAME', 'DESCRIPTION', and 'OPERATIONS'. Each row has a 'List terms' button. A 'Show row weights' link is on the right. At the bottom is a 'Save' button.

VOCABULARY NAME	DESCRIPTION	OPERATIONS
Component Category	Administrative categories for components. For example, element, layout, etc.	List terms
Icon	Taxonomy for Icons	List terms
Statistic Icon	Icons available when creating statistic blocks	List terms
Fiscal Year		List terms
Affiliated Organization		List terms
District Map		List terms
Event Type	Taxonomy for Events	List terms
File Status		List terms
Legislative Session	Legislative Session of Impact Statement	List terms
Media Section	Allows specifying the relevant sections a media item belongs to such as "Economic Analysis and Reports"	List terms
Media Tags	Adds tags to media	List terms
Owner	Specifies owners for content	List terms
Requestor	Requestor field from Impact Statement PDFs	List terms

Example: Vocabulary

The screenshot shows the 'Icon' terms management page. It has the same navigation as the previous page. The breadcrumb trail is 'Home » Administration » Structure » Taxonomy » Edit Icon » Icon'. There is a '+ Add term' button. A text block says: 'You can reorganize the terms in *Icon* using their drag-and-drop handles, and group terms under a parent term by sliding them under and to the right of the parent term.' Below this is a table with columns 'NAME' and 'OPERATIONS'. The table lists terms like 'Agenda', 'Data Icon', 'Download', 'Geography Icon', 'Legislative Icon', 'Materials', and 'Programs Icon', each with an 'Edit' button. At the bottom are 'Save' and 'Reset to alphabetical' buttons.

NAME	OPERATIONS
Agenda	Edit
Data Icon	Edit
Download	Edit
Geography Icon	Edit
Legislative Icon	Edit
Materials	Edit
Programs Icon	Edit

Example: Terms

How to Use a Taxonomy

Taxonomies can have a wide range of purposes. There will need to be some planning before you can start updating a vocabulary in Drupal. Here are a few ways to get you started:

1. **Identifying shareable content on the site:**

A taxonomy can direct users to find documents and content that is shared on the website. For example, providing forms and sheets for download can be guided with the right words or phrases such as using a vocabulary like “Downloads.”

2. **Setting other physical locations of businesses:**

Some websites are used to govern over several physical locations of one business. A taxonomy can be developed to include state, city or even country locales. This is helpful when differentiating specific local information such as blogs and community events. As every location will be different, each will have its own section of the primary website.

Users, Roles & Permissions

1. Drupal has a powerful built-in permissions system that lets you customize what a user can and cannot do on your site. You have great flexibility to choose who can do what. This is primarily managed in two steps: **permissions for roles** and **user assignment to roles**.
2. Drupal is built around serving different content for different people. On your site all **external visitors** are **anonymous users**, and you'll see you have a role called 'anonymous users' that can be edited. And for the most part, users who use a login in to access your site will be there to edit content.
3. You may also have users who log in specifically to publish content prepared by someone else or to administer some aspect of the site. **You first define the roles, then apply permissions to the roles, and then assign users to the roles.**
4. Not everyone should see and have access to the same tools that a systems administrator has, so some thought should go into what the roles are, what permissions each role has, and then which role(s) each user is assigned to.
5. **Users can have multiple roles** - a person will always have access to the highest permission level assigned their roles allow for.

Users, Roles & Permissions

Back to site Manage Shortcuts Search alison

Content Structure Appearance Extend Configuration People Reports Help Elemental

People

List Permissions Roles

Home » Administration » People

+ Add user

Name or email contains:

Status: - Any - Role: Administrator

Permission: - Any -

Filter Reset

Action: Update URL alias

Apply to selected items

USERNAME	STATUS	ROLES	MEMBER
adam.kempler	Active	Administrator	5 months
admin	Active	Administrator	7 months
alison	Active	Administrator	5 months

Back to site Manage Shortcuts Search alison

Content Structure Appearance Extend Configuration People Reports Help Elemental

Permissions

List Permissions Roles

Home » Administration » People » Permissions

Permissions let you control what users can do and see on your site. You can define a specific set of permissions for each role. (See the Roles page to create a role.) Any permissions granted to the Authenticated user role will be given to any user who is logged in to your site. From the Account settings page, you can make any role into an Administrator role for the site, meaning that role will be granted all new permissions automatically. You should be careful to ensure that only trusted users are given this access and level of control of your site.

Filter by name:

Hide descriptions

PERMISSION	ANONYMOUS USER	AUTHENTICATED USER	ADMINISTRATOR	TRAINING ACCOUNT
Actions				
Administer actions <small>Warning: Give to trusted roles only; this permission has security implications.</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admin Toolbar Search				
Use Admin Toolbar search	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ban				
Ban IP addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Back to site Manage Shortcuts Search

Content Structure Appearance Extend

Roles

List Permissions Roles

Home » Administration » People » Roles

A role defines a group of users that have certain privileges. These privileges are defined on the permissions page; here, you can use recommended to order roles from least permissive (for example, Anonymous user) to most permissive (for example, Administrator who are logged in have the Authenticated user role, plus any other roles granted to their user account.

+ Add role

NAME	OPERATIONS
Anonymous user	Edit
Authenticated user	Edit
Administrator	Edit
Training Account	Edit

Save

Search

- The **Search API** module provides a framework for easily creating searches on any entity known to Drupal, using any kind of search engine.
- For site administrators, it is a **great alternative to other search solutions**, since it already incorporates facetting support and the ability to use the Views module for displaying search results, filters, etc.
- With the **Apache Solr integration**, a high performance search engine is available for this module.



Search API ☆

[Home](#) » [Administration](#) » [Configuration](#) » [Search and metadata](#) » Search API

✓ The Solr server could be reached.
Schema on server `solr` contains all required language-specific fields.
Solarium 5.1.4 is installed.

⚠ Your config-set contains manually added customizations. Be aware that these will be lost when the config-set needs to be regenerated.

Below is a list of indexes grouped by the server they are associated with. A server is the definition of the actual indexing, querying and storage engine (for example, an Apache Solr server, the database, ...). An index defines the indexed content (for example, all content and all comments on "Article" posts).

The default Drupal core Search module is still enabled. If you are using Search API, you probably want to [uninstall](#) the Search module for performance reasons. For more information see [the Search API handbook](#).

[+ Add server](#) [+ Add index](#)

TYPE	NAME
Server	<code>solr</code>
Index	<code>scrfa</code>
Index	Site Search

STATUS OPERATIONS

[Back to site](#) [Manage](#) [Shortcuts](#) [Search](#) [alison](#)

[Content](#) [Structure](#) [Appearance](#) [Extend](#) [Configuration](#) [People](#) [Reports](#) [Help](#) [Elemental](#)

Facets ☆

[Home](#) » [Administration](#) » [Configuration](#) » [Search and metadata](#) » Facets

Below is a list of facets grouped by facetsources they are associated with. A facetsource is the instance where the facet does the actual filtering, for example a View on a Search API index. The facets weight can be changed with drag and drop within the same facet source. Although you can drag and drop a facet under any facet source, this change will not be performed on save.

[+ Add facet](#) [+ Add facet summary](#)

TYPE	MACHINE NAME	TITLE	OPERATIONS
Facet source	<code>search_api_views_page__impact_statements_search__impact_statements_search_page_1</code>		Configure
+	Facet	Bill Author <code>field_bill_author_1 - checkbox</code>	Edit
+	Facet	Bill Version or Status <code>field_status - checkbox</code>	Edit
+	Facet	Legislative Body <code>field_legislative_body - checkbox</code>	Edit
+	Facet	Legislative Session <code>field_legislative_session - checkbox</code>	Edit
Facet source	<code>search_api_views_page__main_search_results__page_1</code>		Configure
+	Facet	Media Section <code>field_media_section - checkbox</code>	Edit
+	Facet	Type <code>type_aggregate - checkbox</code>	Edit

Reports

- Built in to Drupal are many **useful site reports** that will help you keep track of the pulse of your site.
- **Custom reports** can also be created by a Drupal developer (like GWW) to meet specific needs.



The screenshot shows the Drupal Reports page. At the top, there is a navigation bar with links for 'Back to site', 'Manage', 'Shortcuts', 'Search', and the user name 'alison'. Below this is a secondary navigation bar with icons for 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', 'Reports', 'Help', and 'Elements'. The main content area is titled 'Reports' and includes a breadcrumb trail: 'Home » Administration » Reports'. A list of reports is displayed, each with a chevron icon and a brief description:

- Available updates**: Get a status report about available updates for your installed modules and themes.
- Recent log messages**: View events that have recently been logged.
- Field list**: Overview of fields on all entity types.
- Metatag plugins**: Overview of plugins used in metatag.
- Status report**: Get a status report about your site's operation.
- Top 'access denied' errors**: View 'access denied' errors (403s).

On the right side, a dropdown menu is open, listing the following report categories: Available updates, Recent log messages, Field list (highlighted with a blue arrow), Metatag plugins, Status report, Top 'access denied' errors, Top 'page not found' errors, Top search phrases, Views plugins, and Webform plugins.

Topics & Topic Types

- Topics are a helpful way of organizing content into groupings. Topics are organized into topic types. For example, BEA is a **Topic** and Board and Committees is the **Topic Type** it is associated with.
- To create a topic:
 1. Click “Add Topic”
 2. Select Topic Type
 3. Enter Topic Name & Save



All Topics ☆

All Topics My Topics

Home » Administration » All Topics

+ Add Topic

Name Topic type - Any -

Apply

MANAGE TOPIC	PAGE LINK	TOPIC TYPE	CREATED	OWNER	OPERATIONS
BEA	View Page	Board and Committees	Mon, 09/14/2020 - 10:50		Edit ▾

Data Oversight Council

Geographic Information Council

Add topic ☆

Home » Administration » All Topics » Add topic

- Board and Committees
- Data and Research
- Geography and Mapping
- Legislative Fiscal Impact
- Programs and Services

Add Board and Committees ☆

Home » Administration » All Topics » Add topic » Add Board and Committees

Topic Name *

The name of the Topic.

Published
A boolean indicating whether the Topic is published.

Save

Topics & Pages

- Individual pages can be organized by Topics. For example, Education Funding Analysis is a **Page** and Education is the **Topic** it belongs to.
- To add a page to a topic:
 1. Select the desired topic and click Edit.
 2. In the Related Content section, start typing the name of the page, select it and Save.



☆

View Admin Edit Revisions Delete

Home » Education

Topic Name *

Education

The name of the Topic.

Create new revision

Published

A boolean indicating whether the Topic is published.

Save Delete

Published
Last saved: 10/15/2020 - 10:58
Author: matthew.stirnweiss
Revision log message

Briefly describe the changes you have made.

► TOPIC ADMIN

► AUTHORING INFORMATION

▼ ASSIGNED CONTENT

Hide row weights

RELATED CONTENT	ORDER
Education Funding Analysis (2119)	0 ▼
Education Finance Projections (2120)	1 ▼
Teacher Salary Information (2122)	2 ▼
Student Count Projections & Histori	3 ▼
	4 ▼

Choose one or more pages or other content to add to this Topic.

Add another item

Topics & Pages

- Organizing pages by topics allows for users to be assigned to topics so they can edit/manage the pages found under those topics.
- To assign a user to a topic:
 - Select the topic you want to manage and click Users.
 - Now you can add or remove users from the topic or manage the existing users.



Users ☆

View Admin Edit Revisions Delete

Assigned Pages Template Menu Users

Home » BEA » Topic » Users

Search for user you would like to perform an action on

Add User to Topic Remove User From Topic

NAME	OPERATIONS LINKS
Lisa.Jolliff	Edit
julia.williams	Edit
marykatherine.miller	Edit
lisa.wren	Edit
Allyn.Powell	Edit
karen.rhinehart	Edit

Q&A