



SOCIETY OF  
**American  
Archivists**

---

# Drupal Manual

A How-To Guide for the Management  
of SAA Component Group “Microsites”

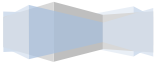


**2011**

Prepared by [Brian Doyle](#), SAA Director of Member & Technical Services  
Available online at [www.archivists.org/governance](http://www.archivists.org/governance).

# Table of Contents

- Introduction ..... 3
  - Auxiliary Group Websites..... 3
- Drupal Basics ..... 4
  - Assignment of Editing Privileges for Group Leaders..... 4
  - Introduction to “Nodes” and “Content Types” ..... 4
  - Table of Component Group Content Types and Associated Permissions..... 4
- Getting Started..... 5
- Your Group Homepage ..... 5
- General Functions ..... 6
  - Add Node ..... 6
  - Edit Node..... 6
  - Revisions ..... 6
  - Rich-text Formatting ..... 8
  - Inserting and Editing Images..... 8
  - Promote to Group Front Page and SAA News Feed..... 8
  - Administering Public vs. Private Content..... 9
  - File Attachments ..... 10
  - Comment Settings..... 10
- Content Type Descriptions..... 11
  - Group Menus ..... 11
  - Group News Items ..... 11
  - Group Pages ..... 11
  - Group Newsletters ..... 11
  - Group Reports ..... 11
  - Group Meetings ..... 12
    - Meeting Agendas ..... 12
    - Agenda Items ..... 12
    - Meeting Minutes..... 12
- Standards ..... 12



## Introduction

This manual contains guidelines for creating component group “microsites” in SAA’s Web content management system, Drupal. In addition to being a resource for volunteer member leaders, the purpose of this document is to foster coordination between committees, sections, roundtables, and the SAA staff in order to develop a highly informative and easy-to-use website for the entire Society.

SAA’s overall Web presence is comprised of a number of different systems. Identifying these systems and their functions is helpful in understanding how your site fits into to this larger framework:

- The “SAA Intranet” (<http://saa.archivists.org>) contains select information that is dynamically published from SAA’s member database or *association management system* (AMS);
- The “SAA Extranet” is the Society’s proverbial front door on the Web and contains content that cannot be managed effectively via the AMS:
  - SAA’s old Extranet site resides at <http://www.archivists.org>.
  - Drupal (the new Extranet site) resides at <http://www2.archivists.org>.
  - Staff and component groups alike are still in the process to migrating content from the former to the latter.
- A variety of other systems add specific functionality not currently supported by either the Intranet or the Extranet. These include SAA’s list server (<http://forums.archivists.org>), *American Archivist Online* (<http://archivists.metapress.com>), the Online Career Center (<http://careers.archivists.org>), and social networks such as Facebook, LinkedIn, and Twitter.

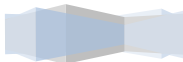
Every group listed in SAA’s Leadership Directory (<http://www.archivists.org/leaders/>) has a basic page on the SAA Intranet, which contains:

- The group’s official charge, if applicable;
- A basic description of the group; and
- Links to:
  - The group’s leader and/or member roster(s);
  - The group’s official email discussion list;
  - The group’s microsite in Drupal, if applicable;
  - Reference documents on SAA policies, procedures, and guidelines.

## Auxiliary Group Websites

Sustaining interoperability and usability within and between the variety of systems outlined above can be a challenge—one that these guidelines seek to address. Due in part to this complexity, **SAA boards, committees, subcommittees, sections, roundtables, working groups, and task forces may not create auxiliary sites, including websites, e-mail discussion lists, wikis, blogs, document sharing sites, and social networks, without prior approval from the Executive Director.**

Please email SAA Headquarters at [saahq@archivists.org](mailto:saahq@archivists.org) for additional information.



## Drupal Basics

### Assignment of Editing Privileges for Group Leaders

Group microsites may be managed by active leaders who are designated in the official group rosters maintained by SAA staff. Assignment of a leader role in the member database automatically confers privileges in Drupal. Three permission levels have been configured: 1) **Group Officers**; 2) **Group Editors**; and 3) **Group Contributors**. These terms do not necessarily correspond to named roles on your steering committee. For example, a “group officer” in Drupal could be a first-year steering committee member with particular interest and/or aptitude in Web content management. The Group Editor role is assigned by default. Staff will manually change group leaders to the Group Officer or Group Contributor roles upon the request of the Chair(s). Group Officers have full permissions to manage the group site. Group Contributors have only limited permissions.

For more information on group leader assignments, resources, and responsibilities, please see the *SAA Leader Manual* available online at <http://www.archivists.org/governance>.

### Introduction to “Nodes” and “Content Types”

Every discrete piece of content administered in Drupal is a **node**. The term “node” is simply an abstraction used to refer to any record, regardless of type. **Content types** are configurations that facilitate the effective management of different *formalized* record types. The constituent data structures and relationships within and between these content types can be simple or complex.

Component group content types and their related permissions are displayed in the Table below. These types are configured globally, even though they may not apply to the circumstances and needs of all groups. (For example, committees generally do not publish “newsletters.”)

### Table of Component Group Content Types and Associated Permissions

**Key:** S = Staff Editor O = Group Officer E = Group Editor C = Group Contributor

**Notes:** Higher roles inherit privileges assigned to lower roles. Staff Editors have full permissions. Permissions are subject to change.

	Create	Edit	Publish	Unpublish	Delete	Add to Feed?
Group Homepage	S	O	S	S	S	n/a
Group Menu	O	O	O	O	S	n/a
Group News Item	C	C	C	C	O	Yes
Group Page	E	E	E	E	O	No
Group Newsletter	E	E	E	E	O	Yes
Group Report	O	O	O	O	S	Yes
Group Meeting	O	O	O	O	S	Yes
Meeting Agenda	O	O	O	O	S	No
Agenda Item	E	E	O	O	S	No
Meeting Minutes	O	O	O	O	S	No
Standard	S	O	S	S	S	No

## Getting Started

Once your Group Homepage is created by the SAA staff and leader roles are assigned in the AMS, you're ready to start configuring your microsite for use. If you've never accessed your site before and a public link is not yet active in the general navigation menu, locate your microsite as follows:

1. Log into to Drupal via your personal SAA Profile;
2. Click "My Account" in the top right corner of the screen;
3. Click on the appropriate link under your list of groups.

If you do not see a link, you may need to have your leader role activated by SAA staff. In addition, Group Officers and/or Web Liaisons should work with staff to coordinate public links to your site once it is ready for use. Email Brian Doyle at [bdoyle@archivists.org](mailto:bdoyle@archivists.org) for additional assistance.

## Your Group Homepage

Your microsite homepage is created by staff and corresponds to a record in SAA's member database. The homepage consists of: 1) the group name; 2) introductory/welcome text; 3) a "Recent News & Announcements" feed that displays selected content in reverse chronological order; 4) an "Automatic Display of Group Nodes" feed that lists of your microsite nodes by content type in reverse chronological order; 5) an administrator menu; and 6) custom menus. (See Figure 1.)

The screenshot shows a web browser window displaying the homepage for the Communications Technology Working Group (CTWG) on the Society of American Archivists (SAA) website. The browser's address bar shows the URL <http://www2.archivists.org/groups/communications-technology-working-group-ctwg>. The page features the SAA logo and a navigation menu with tabs for Home, The Archives Profession, About Us, Education & Events, Publications, Members, and Groups. A search bar is located in the top right corner. The main content area is divided into several sections, each highlighted with a red box and a number:

- 1**: Communications Technology Working Group (CTWG) - Group name and title.
- 2**: Introductory text: "Originally established in 2007 as the Website Working Group, the purpose of the Communications Technology Working Group (CTWG) is to investigate, evaluate, and recommend strategies for the effective management of online content created and/or maintained by the Society. (Review our full charge and responsibilities [here](#).)"
- 3**: Recent News & Announcements - A section with a "Call for Comments" link and a "Social Media Forum" link.
- 4**: Group News Item - A section with a "Call for Comments" link and a "Social Media Forum" link.
- 5**: Administrator menu - A sidebar menu with options: Add a News Item, Add a Newsletter, Add a Page, Add a Report, Add a Meeting, Add Meeting Minutes, Add a Meeting Agenda, Add an Agenda Item, Add a Menu, and 7 members.
- 6**: Custom menu - A sidebar menu with options: ABOUT CTWG, Mission, and Group Members.

The footer of the page includes links for Privacy & Confidentiality, Disclaimer, and Credits, along with copyright information: Copyright © 2011, Developed by CommonPlaces e-Solutions, LLC.

**Figure 1.** Example of a component group homepage, as viewed by the Group Officer. Display of "View" and "Edit" tabs and administrator menu items is contingent upon user permissions.

## *Editing the Group Homepage*

Group Officers may edit introductory/welcome text published on the homepage and access other administrative settings associated with the entire microsite by clicking on the “Edit” tab at the top of the Group Homepage.

**Theme:** Use of the “SAA Theme” is strongly recommended.

**Description:** You may leave this field as is.

**Full Group Description:** The contents of this field correspond to your introductory/welcome message. Enter content to greet your visitors. It is recommended that you be succinct because extensive text may push the Recent News & Announcements Feed “below the fold.”

**Hide Automatic Display of Group Nodes:** See below.

**Header/Footer:** The header and footer fields are intended for creating custom page templates using the “Blank Theme” option. It is recommended that these fields be left blank.

**Comment Settings:** Disabled by default (recommended).

**File Attachments:** Generally, files are attached to other microsite nodes. However, they are also supported on the Group Homepage if desired.

## *Hide Automatic Display of Group Nodes (“Auto-links”)*

Links to group content appear at the bottom of all nodes in your microsite. They are arranged in reverse chronological order by content type and cannot be rearranged. To give Group Officers more flexibility in controlling microsite navigation, the checkbox labeled “Hide Automatic Display of Group Nodes” places these links in a grey box that is visible only to group administrators. (See Figure 2.) If you decide to use this option, customized menus should be created to direct users to your content.

## General Functions

The following functions are common to many group content types:

### Add Node

Click the “add” links in the right-hand administrator menu to create nodes according to content type. Display of these links is contingent upon your designated permissions.

### Edit Node

Authenticated users with the requisite permissions will see “View” and “Edit” tabs at the top of nodes they are authorized to edit. Click the Edit tab to access the editing tools.

### Revisions

Every time you edit and save a node, a copy of the old version is automatically recorded. You may also enter a log message for internal reference purposes. Prior versions, if applicable, may be accessed via the “Revisions” tab. Please note, however, that **prior versions of the Group Homepage are not maintained.**

6

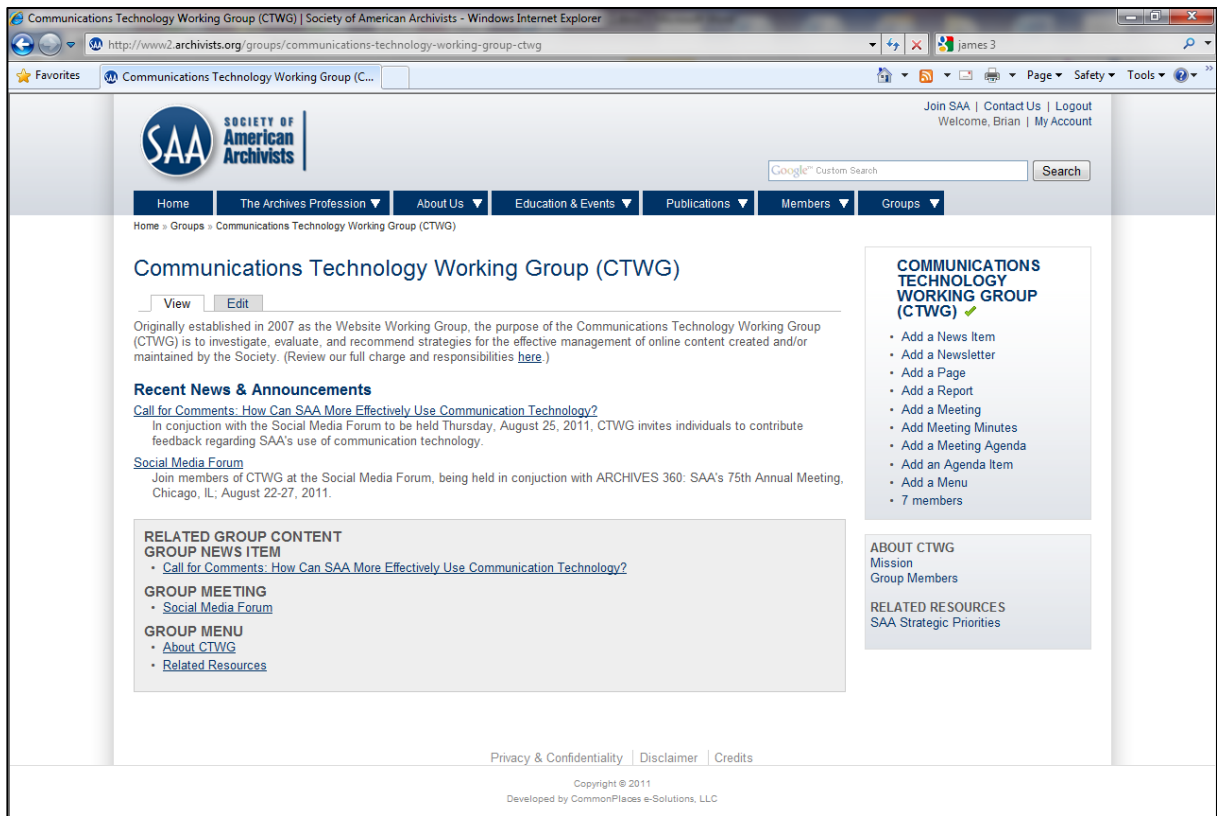


Figure 2. Group Homepage with automatic display of group nodes (“auto-links”) hidden.

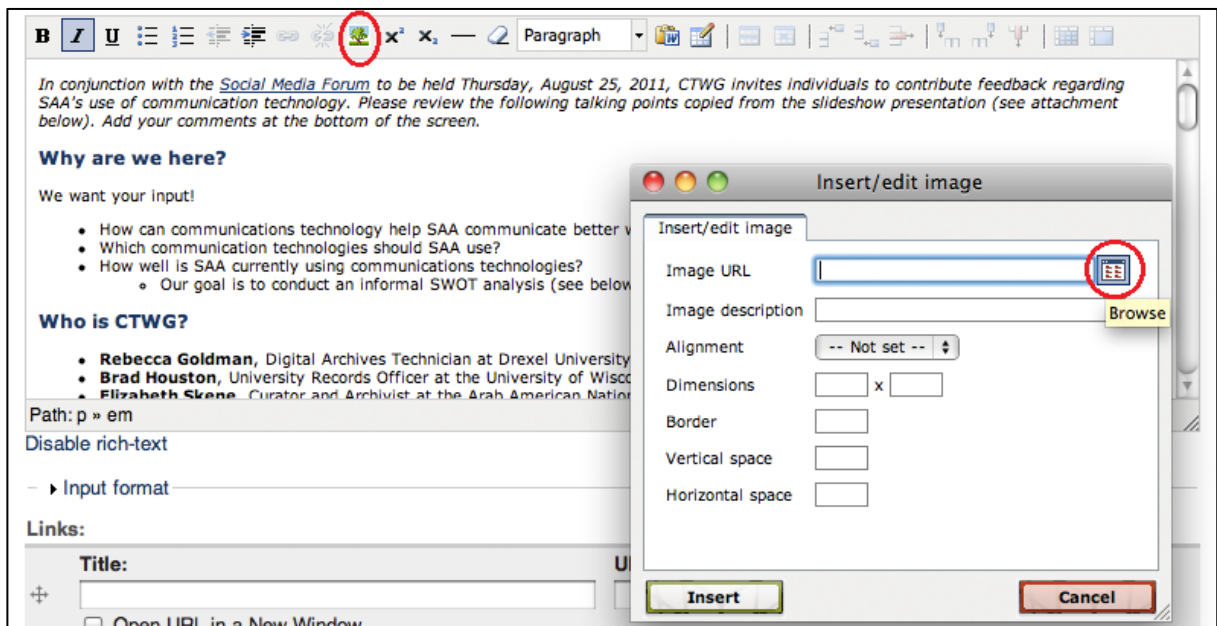


Figure 3. “Insert/edit image” icon and dialog box.

## Rich-text Formatting

Most content types feature at least one long-text field with a WYSIWYG<sup>1</sup> formatting toolbar (see Figure 3). This toolbar may be used for relatively simple formatting such as boldface, italic, bullet lists, numbered lists, indentation, and editing of static hyperlinks.

### Tips for Using the Formatting Toolbar Effectively:

- When pasting text from Word, be sure to use the **“Paste from Word”** icon to strip out incompatible code.
- Use the eraser icon to **Remove Formatting** applied in external applications. Note: This may require reapplication of your desired formatting.
- Use the **Format** drop-down menu to apply standardized styles (e.g., H2, H3, etc.) for headers and sub-headers.

**Input Format:** Two editing modes may be used:

1. **Filtered HTML** (recommended) is the default mode that displays the toolbar.
2. **Full HTML** enables you to edit your markup code directly. *Tip:* Nodes edited in Full HTML mode must be saved in that mode for some tags to render. (Changing modes will “filter” them out.)

## Inserting and Editing Images

The formatting toolbar features an icon that allows you to easily insert and edit inline images. The icon looks like a tree (see Figure 3). Images are inserted at your cursor’s location. Clicking on the icon opens a dialog box in which you can set the image URL, description, alignment, dimensions, border, and vertical/horizontal space to appear around the image (i.e., the gutter).

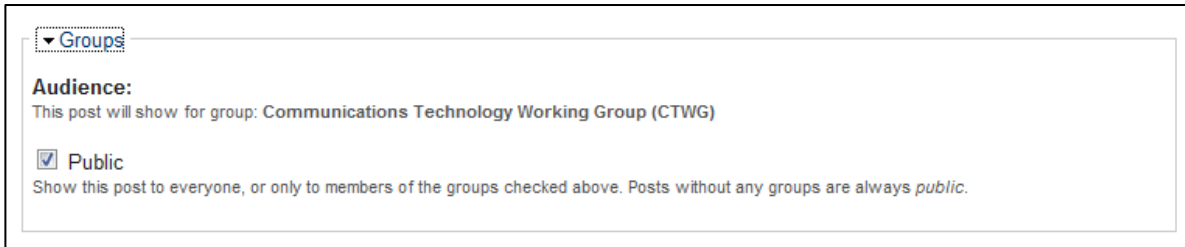
To the right of the Image URL field is a “Browse” icon. Clicking this icon opens another dialog box that displays your individual user folder in Drupal. You may use the “Upload” link to upload image files from your local drive. Uploaded files may be highlighted and inserted into your node by clicking on the “Insert” link. Upon returning to the “Insert/edit image” dialog box, you will notice that the Image URL field is now populated with the absolute path to your image in Drupal. Click again on the “Insert” button to return to your node edit screen. You will now see your image in the WYSIWYG text field.

## Promote to Group Front Page and SAA News Feed

Links to News Items, Newsletters, Reports, and Meetings nodes are automatically displayed in reverse chronological order on your group homepage and on the Global SAA Newsfeed at <http://www2.archivists.org/newsfeed> if and when the checkbox on the node edit screen is checked (default). Items can also be designated as “sticky” under Publishing Options, found at the bottom of the node edit screen. Sticky nodes will remain at the top of your homepage feed above other more recently created content.

---

<sup>1</sup> “What you see is what you get” (WYSIWYG)



▼ Groups

**Audience:**  
This post will show for group: Communications Technology Working Group (CTWG)

Public  
Show this post to everyone, or only to members of the groups checked above. Posts without any groups are always *public*.

**Figure 4.** The “Public” checkbox on the node edit screen.

## Administering Public vs. Private Content

Under the “Groups” header on the node edit screen is a checkbox labeled “Public” (see Figure 4). Check this box to make the node appear to users outside of your group leadership.

There are two methods to administer private content—i.e., nodes viewable only by your group leaders and staff:

**“Weak” Method:** If you leave the checkbox labeled “Public” unchecked, links to the node will not display in your News Feed or in the auto-links block for public users. Such links will appear for your group leaders and for staff. There are two limitations to this method:

- Static links embedded in other group nodes or on external sites are unaffected by the “Public” checkbox setting.
- Actual access to the node is not restricted. If a public user browses to your private node via a static link or by typing the URL directly into her browser, the content will display. Therefore, confidential information should not be managed via this method.

**“Strong” Method:** All group content types have been configured with per-node access control. Group Officers have permission to use these settings, which are managed via the “Access control” tab displayed to the right of the “Revisions” tab (see Figure 5).

This screen allows Group Officers to override the standard node permissions specified in the table on Page 4 of this manual. These controls supersede the Public checkbox setting and should be used as follows. (Note: Numbers below correspond to labels in Figure 5.)

1. Under “View any content,” uncheck **anonymous user** and **authenticated user**. This removes the default view permission granted to all public users.
2. Under “View any content,” check **group contributor**, **group editor**, and **group officer**. This re-grants view permission to your group leaders. (Note: You may ignore group manager. That role is not used.)
3. If you wish to grant view permission only to SAA members, check the **saa member** role under “View any content.”
4. Uncheck **anonymous user** and **authenticated user** under “View own content.”
5. **DO NOT ALTER** any settings labeled “Edit \* content” or “Delete \* content.” Changing these controls risks unauthorized modification to and/or deletion of your content!

View Edit Revisions Access control

▼ Role based access control settings  
 Note that users need at least the *access content* permission to be able to deal in any way with content. Furthermore note that content which is not published is treated in a different way by drupal: It can be viewed only by its author or users with the *administer nodes* permission.

View any content:	Edit any content:	Delete any content:
<input checked="" type="checkbox"/> anonymous user <b>1</b>	<input type="checkbox"/> anonymous user	<input type="checkbox"/> anonymous user
<input checked="" type="checkbox"/> authenticated user	<input type="checkbox"/> authenticated user	<input type="checkbox"/> authenticated user
<input checked="" type="checkbox"/> admin	<input checked="" type="checkbox"/> admin	<input checked="" type="checkbox"/> admin
<input type="checkbox"/> associated orgs editor	<input type="checkbox"/> associated orgs editor	<input type="checkbox"/> associated orgs editor
<input type="checkbox"/> group contributor <b>2</b>	<input type="checkbox"/> group contributor	<input type="checkbox"/> group contributor
<input type="checkbox"/> group editor	<input checked="" type="checkbox"/> group editor	<input type="checkbox"/> group editor
<input type="checkbox"/> group manager	<input type="checkbox"/> group manager	<input type="checkbox"/> group manager
<input type="checkbox"/> group officer	<input type="checkbox"/> group officer	<input type="checkbox"/> group officer
<input type="checkbox"/> saa member <b>3</b>	<input type="checkbox"/> saa member	<input type="checkbox"/> saa member
<input checked="" type="checkbox"/> staff editor	<input checked="" type="checkbox"/> staff editor	<input checked="" type="checkbox"/> staff editor
<input type="checkbox"/> thesaurus editor	<input type="checkbox"/> thesaurus editor	<input type="checkbox"/> thesaurus editor
<input type="checkbox"/> timeline editor	<input type="checkbox"/> timeline editor	<input type="checkbox"/> timeline editor

View own content: <b>4</b>	Edit own content:	Delete own content:
<input checked="" type="checkbox"/> anonymous user	<input type="checkbox"/> anonymous user	<input type="checkbox"/> anonymous user
<input checked="" type="checkbox"/> authenticated user	<input type="checkbox"/> authenticated user	<input type="checkbox"/> authenticated user
<input checked="" type="checkbox"/> admin	<input checked="" type="checkbox"/> admin	<input checked="" type="checkbox"/> admin
<input type="checkbox"/> associated orgs editor	<input type="checkbox"/> associated orgs editor	<input type="checkbox"/> associated orgs editor
<input type="checkbox"/> group contributor	<input checked="" type="checkbox"/> group contributor	<input type="checkbox"/> group contributor
<input type="checkbox"/> group editor	<input type="checkbox"/> group editor	<input type="checkbox"/> group editor
<input type="checkbox"/> group manager	<input type="checkbox"/> group manager	<input type="checkbox"/> group manager
<input type="checkbox"/> group officer	<input type="checkbox"/> group officer	<input type="checkbox"/> group officer
<input type="checkbox"/> saa member	<input type="checkbox"/> saa member	<input type="checkbox"/> saa member
<input checked="" type="checkbox"/> staff editor	<input checked="" type="checkbox"/> staff editor	<input checked="" type="checkbox"/> staff editor
<input type="checkbox"/> thesaurus editor	<input type="checkbox"/> thesaurus editor	<input type="checkbox"/> thesaurus editor
<input type="checkbox"/> timeline editor	<input type="checkbox"/> timeline editor	<input type="checkbox"/> timeline editor

**DO NOT ALTER THESE SETTINGS! Changing edit or delete permissions risks unauthorized modification to or deletion of your content.**

**5**

Submit

**Figure 5.** The Access Control screen. (See page 9 for instructions regarding numbered blocks above.)

## File Attachments

Use this feature to upload and display file attachments with the node.

## Comment Settings

Specify whether authenticated users may read and/or add Comments to the node.

## Content Type Descriptions

### Group Menus

Group Officers can create and edit any number of Group Menus, each of which has its own name and any number of sortable links. Group Menus themselves may also be sorted via the **Node Weight** control on the menu's Edit tab. Smaller values are considered lighter and will appear above heavier items. Group menus display in the right-hand margin of your microsite and may be edited by clicking on the respective links under "Group Menu" in the auto-links block.

**SAA staff will work with group leaders to configure a core menu** with links to information about the group maintained in the AMS and elsewhere (e.g., leader rosters, group member directory, email discussion list(s), etc.) We strongly discourage groups from duplicating such information on static nodes in the microsites. Please contact Brian Doyle at [bdoyle@archivists.org](mailto:bdoyle@archivists.org) for assistance.

### Group News Items

Group News Items are designed to support miscellaneous announcements and updates that you want to share with the public. These may include calls for newsletter submissions, calls for nominations, etc. Group News Items may be added to your homepage feed. News items consist of a **Title**, a **Short Description** that displays on the group homepage feed (if applicable), a rich-text **Content** field, **Links**, and **File attachments**.

### Group Pages

Group Pages are a generic content type for permanent or semi-permanent nodes such as Section and Roundtable bylaws, editorial guidelines for newsletter submissions, etc. Group Pages consist of a **Title**, a rich-text **Body** field, and **File attachments**.

Group Pages may not be added to your homepage feed. **Group Pages should not be used to duplicate information that is maintained by staff in the AMS or elsewhere in Drupal—e.g., leader rosters, member rosters, SAA Governance Manual content, etc.** Rather, staff will work with group leaders to configure custom Group Menus to link to this content as needed.

### Group Newsletters

Group Newsletters consist of a **Title**, a **Short Description** that displays on the group homepage feed (if applicable), a rich-text **Body** field, and **File attachments**. Group Newsletters may be added to your homepage feed.

### Group Reports

Group Reports consist of a **Title**, a **Short Description** that displays on the group homepage feed (if applicable), a rich-text **Body** field, and **File attachments**. Group Reports may be added to your homepage feed.



## Group Meetings

Group Meetings consist of a **Meeting Name**, **Location** fields (e.g., *Location Name*, *Contact Name*, *Address*, etc.), **Meeting Date(s)**, a **Short Description** that displays on the group homepage feed (if applicable), a rich-text **Description**, a **Referenced Meeting Agenda** pointer, a **Referenced Group Minutes** pointer, and **File attachments**. Group Meetings may be added to your homepage feed.

Group Meetings provide a mechanism to manage and display structured relationships with content that is related to the meeting. For example, Meeting Agendas may be published as formatted text in the Description field, as a File attachment, or as a hierarchical set of child nodes. Use of the child Content Types is more complex but allows for granular content settings (e.g., Comments, etc.)

### Meeting Agendas

Meeting Agendas consist of an **Agenda Name**, a rich-text **Introduction** field, a **Referenced Group Meeting** (parent node) pointer, and **Referenced Agenda Item** (child node) pointers. The meeting agenda content type is configured to dynamically display hyperlinks to constituent agenda items.

### Agenda Items

Agenda Items consist of an **Item Name**, a plain-text **Presenter** field, a rich-text **Abstract** field, a **Referenced Meeting Agenda** (parent node) pointer, a **Node Weight** field that controls sorting of the agenda items within the Agenda, and **File attachments**. There is also a rich-text **Prefatory Text** field that you may use to specify sub-headers (e.g., Old Business, New Business, etc.) that you want to display on the Meeting Agenda.

### Meeting Minutes

Meeting Minutes consist of a **Title**, a rich-text **Body** field, a **Referenced Group Meeting** (parent node) pointer, and **File attachments**. Links to referenced meeting minutes are dynamically displayed on the Group Meeting node.

## Standards

Standards are a special content type that works in conjunction with the SAA Standards Portal (<http://www2.archivists.org/standards>). According to the Standards Committee guidelines, these documents include standards, technical standards, conventions, rules, guidelines, and best practices. SAA Standards that are formally adopted by the Council and assigned to a component group for ongoing maintenance are among those included in the portal. Draft SAA standards may also be included, pending approval from the Standards Committee.

Once a Standard is added to the portal and assigned a maintaining group, it will be listed among the group's nodes in the auto-links block. Custom links may also be displayed via a Group Menu. **Group Officers have permissions to edit a Standard. That being said, revisions to SAA-adopted standards must be approved by the SAA Council. Please do not edit such documents without consulting with the SAA staff in advance.** For more information about maintaining Standards, contact Brian Doyle at [bdoyle@archivists.org](mailto:bdoyle@archivists.org).