

Drupal Workshop, Part 5

Menus, Blocks and Books

TECH BRIEFING

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Menus, Blocks & Books (Oh, my!)

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Regions and Blocks

Drupal pages are composed of various **regions**. Each theme (visual design) defines its own regions. To see what regions have been defined for the current theme, go to the **Blocks administration page** (aka **Block overview page**) at **Administer->Site building ->Blocks** (`admin/build/block`)

Every theme will have a **content** region, for the main content of a page, whether the page is displaying the content of a single full node or the page display of a view.

All the other regions are optional and used to display the rest of the information that makes up the web page, including any headers, footers, menus, and the like.

With few exceptions, the information that appears in these other regions is in **blocks**.

Drupal has three types of blocks: menu blocks, free-form blocks, and module-provided blocks. (The block display for a View is a special case of module-provided blocks.)

The **Blocks administration page** is where all of these kinds of blocks are configured for:

- **Block title** (overrides default title of block, set elsewhere)
- **User-specific visibility** settings
- **Role-specific visibility** settings
- **Page-specific visibility** settings

For module-provided blocks, there are often additional configuration settings.

This is also where you set which region a block should appear in, if any.

Note: Always **configure** a block *before* setting its region. This avoids a block appearing on pages where it shouldn't, or to users who shouldn't see it, before you've configured it.

Because each theme defines its own regions, and because not all themes have the same regions, block settings are per theme. For example, you can set a block to appear in the left sidebar in the Stanford theme but in the right sidebar (or not at all) in the Garland theme.

Free-form blocks

The **Blocks administration page** (aka **Block overview page**) at **Administer->Site building->Blocks** (`admin/build/block`) is also where free-form blocks are created and their content edited.

To add a new block, click the **Add block** tab.

In the **Block description** field, enter the name of the block that will be listed on the Blocks administration page. Only site staff with the *administer blocks* permission will ever see this name and description, so clear is better than brief.

In the **Block title** field, enter the title of the block that should be displayed on the web page to users. A title is optional and may be left blank.

In the **Block body** field, enter the content for the block. This can include HTML, links, images, and so on (if allowed by the **Input format**).

Select the desired setting for **Custom visibility settings** in the **User-specific visibility settings** section. Most of the time this will be *Users cannot control whether or not they see this block*.

If you want only certain roles to see the block (for example, only SUNet users or only Anonymous users), *select (enable)* those roles under **Show block for specific roles** in the **Role specific visibility settings** section. If you want *everyone* to see the block, leave all roles *unselected (disabled)*.

If you want the block to appear only on certain pages, set **Show block on specific pages** to *Show on only the listed pages* in the **Page-specific visibility settings**, and then enter the Drupal paths of the pages where it should appear into the **Pages** field, one path per line.

The **Drupal path** is the part of the URL after the URL for the front page of the site. For example, if the URL for the page is `http://www.stanford.edu/group/example/cgi-bin/exampledrpl`, then the Drupal path for the page at `http://www.stanford.edu/group/example/cgi-bin/exampledrpl/foo/bar` is **foo/bar**

The asterisk(*) character can be used as a wildcard. For example, to show a block not only on the `foo/bar` page but also on every page with a Drupal path that starts `foo/bar/`, enter: **foo/bar**
foo/bar/*

To show a block everywhere except on certain pages, select *Show on every page except the listed pages* and enter the paths into the **Pages** field as above, only this time listing where the block should *not* appear.

To show a block everywhere, select *Show on every page except the listed pages* and leave the **Pages** field empty.

Tip: To get the most advantage from the wildcard feature, plan your URL conventions carefully in advance.

When done, don't forget to click the **Save block** button.

The new block is now listed on the Blocks administration page under **Disabled**. It won't show on any pages until you select a region from the drop-down list next to the block name & description. Alternatively, you can grab the crossed arrows next to the block name & description and drag it to the appropriate region in the list.

You can enable or rearrange multiple blocks before clicking the **Save blocks** button, but remember to save to before moving to another page!

The new block should now be visible in the region selected.

To edit a free-form block, return to the Blocks administration page and click on the **Configure** link in the **Operations** column.

Note: If you click on the **Delete** link in the **Operations** column, the block and its contents will be deleted completely. *There is no "undo."* Instead of deleting free-form blocks, disable them by dragging them to the disabled section of the list or selecting `<none>` from the drop down list in the **Region** column.

Menus

Creating a menu

As with free-form blocks, where and to whom a menu appears is configured from the **Blocks administration page** at **Administer->Site building->Blocks** (`admin/build/block`).

But unlike with free-form blocks, menus are created and their content is edited elsewhere.

To create a new menu, go to the **Menus administration page** at **Administer->Site building->Menus** (`admin/build/menu`).

Click the **Add menu** tab.

In the **Menu name** field, enter the computer name for the menu. This name must be unique and can contain only lowercase letters, numbers, and hyphens.

In the **Title** field, enter the human name for the menu. This can contain capitalization, spaces, and so on. This title will be displayed to users unless a different title (or `<none>`) is selected in the block configuration settings for the menu from the Blocks administration page.

In the **Description** field, enter a description of the menu. This will only be shown on the Menus administration page, and so only seen by site staff who have the *administer menu* permission. The description should be detailed enough so it is clear to future administrators what the purpose of the menu is.

Click the **Save** button.

After saving a menu (whether newly created or just edited), Drupal returns to the **List items** page for that menu. This page can also be accessed by going to **Administer->Site building->Menus** (`admin/build/menu`) and clicking on the link for the relevant menu.

Since we just created this menu, there are no items listed.

There several ways to add items to a menu.

Adding a menu item (method 1)

The first is to click the **Add item** tab on the **List items** page for your chosen menu.

In the **Path** field, enter either an internal Drupal path or an external URL starting with `http://` (Remember, the Drupal path is the part of the URL *after* the URL for the front page of the site. For example, if the URL for the page is `http://www.stanford.edu/group/example/cgi-bin/exampledrpl`, then the Drupal path for the page at `http://www.stanford.edu/group/example/cgi-bin/exampledrpl/foo/bar` is **foo/bar**) To link to whatever page is set as the front page of the site, enter **<front>**.

In the **Menu link title** field, enter the title that will appear in the menu for the link.

In the **Description** field, enter the text, if any, that you want to be displayed when hovering over the menu item.

Leave the **Enabled** option *enabled (checked)*, but remember that this setting is here.

Instead of deleting a menu item, you can just disable it.

Enable (check) the **Expanded** option if you want any children of this menu item to always be displayed. Leave it disabled (unchecked) to have any children only show up when on that link's page (or its children).

The **Parent item** drop down list will already be set to the top level of the current menu. Leave it as is or change as appropriate (either to a menu item lower on the current menu tree or even to a completely different menu).

The **Weight** setting determines the order of items listed in the menu. It can be set here, but is easier to set using drag and drop on the **List items** tab page.

Click the **Save** button.

Adding a menu item (method 2)

Another way to add an item to a menu is to edit the **node** the menu item should link to.

If you go to **Administer->Content management->Content** (`admin/content/node`), there is a list of all the nodes for the site.

Click on the title for one of the nodes with *Basic page* in the **Type** column.

Click on the **Edit** tab.

Click on **Menu settings** to expand that section.

In the **Menu link title** field, enter the text that should appear in the menu for this item. (If left blank, no menu item will be created.) Often this will be the same as the Title for the node.

From the **Parent item** drop down list, choose the menu (or one of its children) where this item should appear.

Again, **Weight** can be set here, but it is easier to use drag and drop on the menus **List items** tab page.

Scroll down and click on the **Save** button.

Return to the **Menus administration page** at **Administer->Site building->Menus** (`admin/build/menu`) and click on the link to the relevant menu.

Notice the menu item you just added is listed. Grab the crossed arrows to drag and drop to change the order of the items. Don't forget to click **Save configuration** or any changes to the order will be lost!

Displaying a menu

We've added a menu and populated it with some items, but you'll notice it isn't showing up anywhere. To actually display the menu:

Go to the **Blocks administration page** at **Administer->Site building->Blocks** (`admin/build/block`)

Find your new menu listed in the **Disabled** section and click on its configure link.

Make any desired adjustments to the **Block title** and visibility settings, then click the **Save block** button.

Again find the menu listed in the **Disabled** section, then select the desired **Region** for it from the drop down list.

Click the **Save blocks** button.

Your menu should now appear (but only on the pages and for the people specified).

*Tip: It is usually better and easier to add or edit links to nodes by editing the **node** settings, rather than adding or editing the item in the **menu** settings. Not only does this sidestep having to look up or remember the node's Drupal path, but it also makes sure that the node's menu settings and the menu's item settings stay in sync. (Node menu settings are overridden by any direct menu settings you create.) An exception is when you want a link to a single node in two different menus. In that case, only one may be set by editing the node. The other must be set from the menu settings.*

Books

Book is one of the optional modules that comes with Drupal core. It enables you to organize content into hierarchal, book-like structures or outlines, with automatically added navigation that makes it easier to read pages in sequence.

Adding the Book module

Just as with contributed modules, there are 4 steps to adding an optional core module to a Drupal site:

- **Install** the module
- **Enable** the module
- Set **permissions** for the module
- **Configure** the module

The only difference between adding an optional core module and adding a contributed module is that first step. Installing the module occurs automatically when you install Drupal.

For the Book module, these 4 steps look like this:

1. Install the module

This has already been done when Drupal was installed

2. Enable the module

- Go to **Administer->Site building->Modules** (`admin/build/modules`)
- In the **Core optional** section, enable (check) **Book**.
- Scroll down to the bottom of the page and click the **Save configuration** button

3. Set permissions for the module

- Go to **Administer->User management->Permissions** (`admin/user/permissions`)
- Scrolling through the list and/or using the browser's **Find/Search**, we find the **Book module** section towards the top of the list.
- Enable (check) **Access printer-friendly version**, **Add content to books**, **Administer book outlines**, and **Create new books** for the Zite Admin role.
- Keep scrolling down the permissions page, keeping an eye out for unchecked boxes in the **Zite Admin** column. Zite Admins should have all permissions except for those that include the terms *PHP* or *delete*.
- In the **node module** section, we find several new permissions that should be enabled for Zite Admins:
 - *create book content*
 - *edit any book content*
 - *edit own book content*
- Scroll down to the bottom of the page and click the **Save permissions** button.

4. Configure the module

- Go to **Administer->Content management->Books** (`admin/content/book`)
- Click the **Settings** tab.
- In the **Allowed book outline types** section, enable (check) the content types you will allow in books. For our example, this would be *Basic page*, *Book page*, and *Story*. We could enable *Change entry* too, but I don't anticipate organizing To-Do or Done change into outlines.
- In the **Default child page type** section, I recommend selecting *Basic page* instead of *Book page*. This is because I'm going to have us delete the *Book page* content type. For most purposes, book pages aren't any different from the sites default Basic page, so there is no need to have a special content type for books. (It just adds to the number of content types that need to be maintained, with no significant benefit.)
- Click the **Save configuration** button.
- To delete the *Book page* content type, go to **Administer->Content management ->Content types** (`admin/content/types`)
- Click the **Delete** link in the **Operations** column of the **Book page** row.
- Drupal will ask if you're sure you want to do this, and you are, so click the **Delete** button.

Creating a book

To create a book, you simply add or edit a node.

The book settings for a node can be set either by clicking the **Outline** tab or by clicking

the **Edit** tab for the node and then clicking Book outline to expand that section.

In either case, use the **Book** drop down list to select *<create a new book>*.

The **Weight** setting determines the order of pages within a book or book section. It can be set here, but is easier to set elsewhere using drag and drop.

If in the **Outline** tab, click on the **Add to book outline** button, or if in the **Edit** tab, click on the **Save** button.

Now there are additional links at the bottom of the page content: **Add child page** and **Printer-friendly version**.

Adding a page to an existing book

The easiest way to add a page to an existing book is to navigate to the intended parent page and click on the **Add child page** link. (Only site staff with appropriate permissions will see this link.)

Then fill out the form as for any other node.

Notice that the settings in the **Book outline** section are already appropriately configured for both **Book** and **Parent item**.

Scroll to the bottom and click the **Save** button.

Notice that there are now additional links at the bottom of the page: **Up** and a link to the preceding page in the hierarchy. If there was a page *after* this one in the hierarchy, there would also be a link to it.

Click on the **Up** link. Notice that there is now an automatically generated list of the node's child pages after the content of the page.

Add some more child pages.

Tip: Books can have multiple nested sections (that is, child pages can have child pages of their own).

Adding an existing page to an existing book

Using the **Add child page** link creates a page with the content type set for **Default child page type** in the general book settings. But *any* content type allowed in the general book settings can be added to a book.

Simply create a node of the desired content type (or go to an existing node you wish to add to the book outline), then either click the **Outline** tab for the node or click the **Edit** tab for the node and then click **Book outline** to expand that section.

In either case, use the **Book** drop down list to select the relevant book.

Use the **Parent item** drop down list to select the parent item for the current node.

Again, the **Weight** setting determines the order of pages within a book or book section. It can be set here, but is easier to set elsewhere using drag and drop.

If in the **Outline** tab, click on the **Add to book outline** button, or if in the **Edit** tab, click on the **Save** button.

Re-ordering a book

As mentioned, the **Weight** settings of book pages determines their order, but it is much easier to order books by going to **Administer->Content management->Books** and clicking on the **Edit order and titles** link for the relevant book.

By grabbing the crossed arrows, you can drag and drop pages in the book to reorder them. You can even change the parent-child relationships and change the page titles.

Don't forget to click the **Save book pages** button when you're done!

Automatic book menu

The Book module includes a module-provided block, **Book navigation**. This block is an automatically generated menu for books -- no need to enter menu information item by item or node by node!

To configure and display the Book navigation block, go to **Administer->Site building ->Blocks** (admin/build/block).

Find **Book navigation** in the **Disabled** section and click on its **Configure** link in the **Operations** column.

The settings options for this block include all the default block settings (title and visibility settings), plus **Book navigation block display**.

The choices for **Book navigation block display** are

- *Show block on all pages*
- *Show block only on book pages*

The **Help** text for the setting explains these pretty well:

If *Show block on all pages* is selected, the block will contain the automatically generated menus for all of the site's books.

If *Show block only on book pages* is selected, the block will contain only the one menu corresponding to the current page's book. In this case, if the current page is not in a book, no block will be displayed.

For now, select *Show block on all pages*.

Click the **Save block** button.

Next, select a region in which to display the **Book navigation** block (using the drop down menu in the **Region** column), then click the **Save blocks** button.

Notice the default **Book navigation** title used for the block.

Now go back to the **Blocks administration page** and configure the **Book navigation block** to *Show block only on book pages*.

Notice that the block no longer shows on the front page, but if you go to a page in the book, it appears, using the book's title as the block title.

Now, that wasn't nearly so scary as lions and tigers and bears, was it?
