

Editing Guide for Existing Drupal Website

CTSI Guide for Editing UCSF Drupal-Hosted Websites

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For all items in this document, you must log in as an editor by going to: [youwebsite].ucsf.edu/user. If you need to be set up as an editor, request the website owner to create you a login (a username and password will be emailed to you), or submit an IT help ticket.

Learning Resources List

We suggest consulting this list of resources:

- Drupal Training Video (second video on page): <https://websites.ucsf.edu/training>
- Drupal website FAQ: <https://websites.ucsf.edu/frequently-asked-questions>
- Drupal website Specific Tutorials: <https://websites.ucsf.edu/drupal-tutorials>
- Community: [Drupal group on Teams](#)
- Accessibility information: <http://siteimprove.ucsf.edu/>

Log On as Editor

1. You will receive a username and password from the website administrator upon request.



- 2.
- 3.

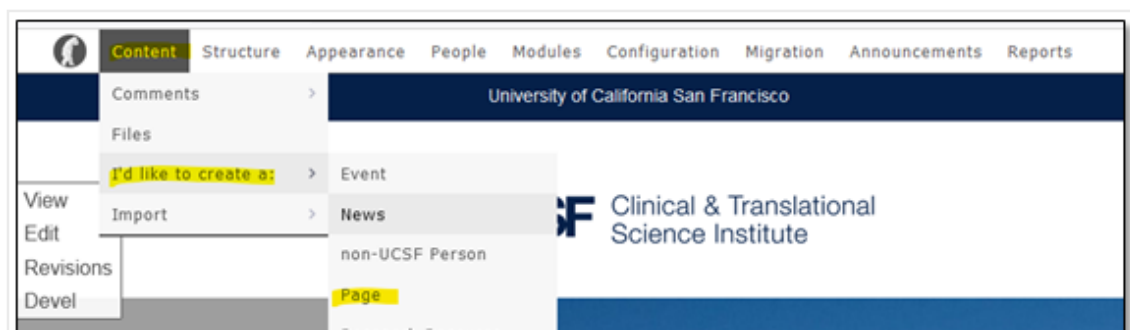
4. Navigate to your preferred internet browser and go to the login page.
Login pages are as follows:
[yoursite].ucsf.edu/user
For example, if you are logging in to ctsi.ucsf.edu, you will navigate to ctsi.ucsf.edu/user



5.
6.

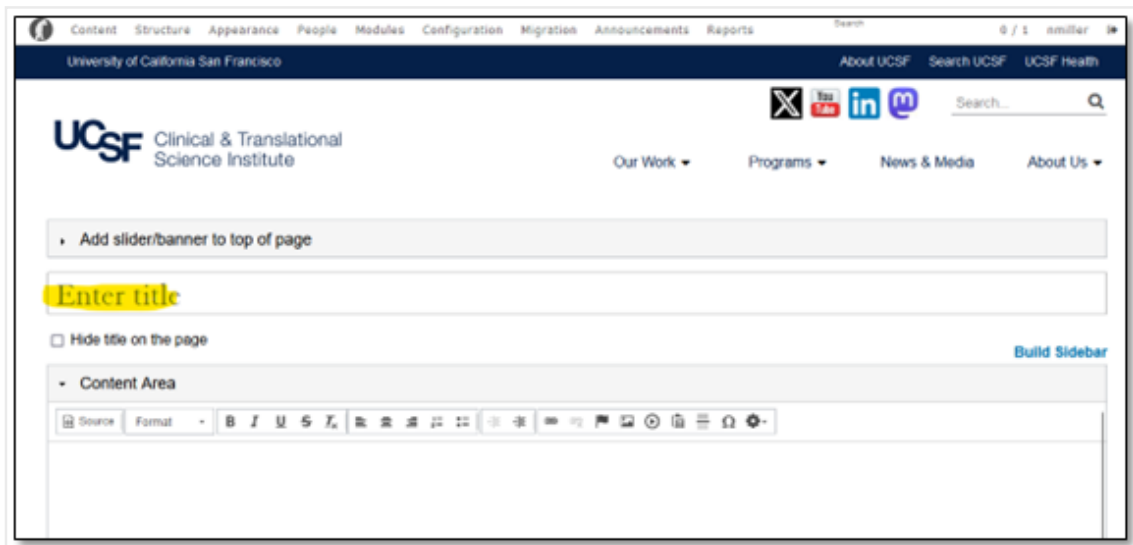
Create a New Page + Page Editing Options:

1. From the navigation at the top, go to Content > I'd like to create a: > Page.



3.

4. Enter a Title.

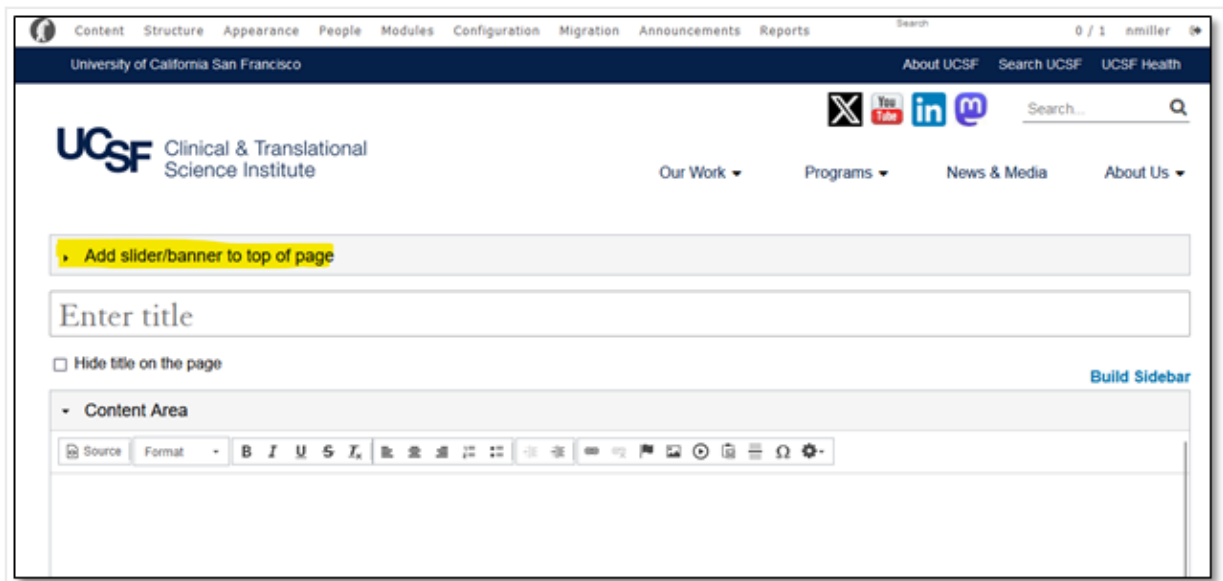


5.

6.

1. Slider/Banner:

To add a slider/banner at the top, expand the 'Add slide/banner to top of page' accordion.



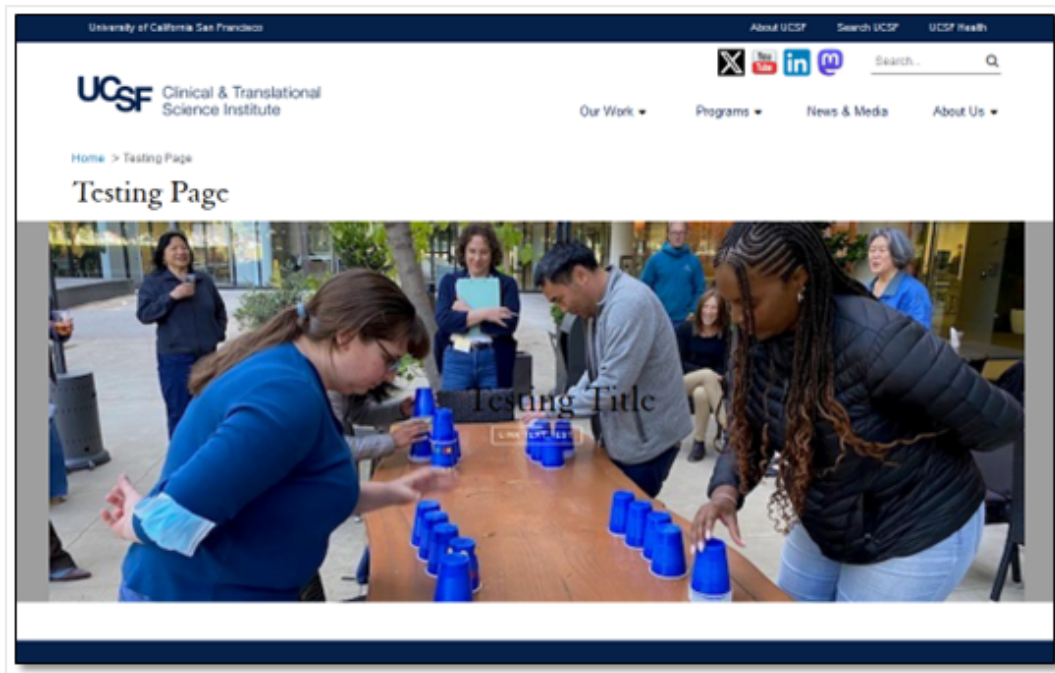
2.

3.

4. Slider/Banner:

Select Slider/Banner Type:

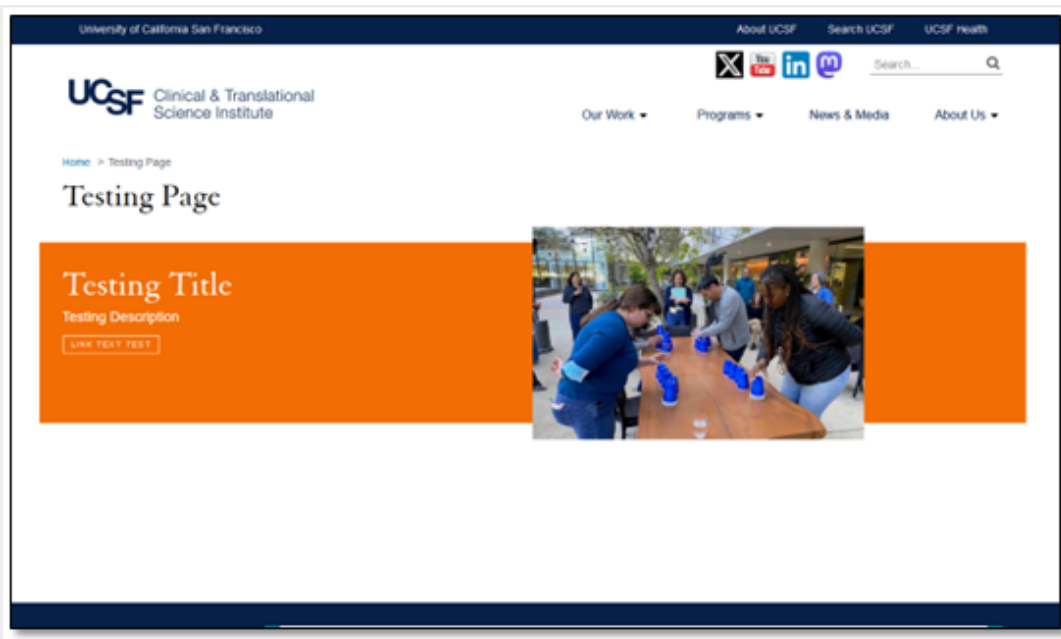
1. Option 1: Home Page Slider – allows for 1 or multiple images (that can slide).



5.

6.

2. Option 2: Secondary Page Banner – only allows for 1 image (is a banner).



1. Slider/Banner:

Add all the slider/banner image(s):

Add an Image by selecting 'Browse' and selecting your image. After selecting the image, press Upload.

• Add slider/banner to top of page

Hero Template *
 Secondary Page Banner

Images	Order
Image Browse No file selected. Upload Files must be less than 256 MB. Allowed file types: png gif jpg jpeg Title Description Link Text (128 characters maximum) Link URL	1

2.

3.

1. Slider/Banner:

Once the image uploads, place the cross-hair on the main focal point of the photo.

▼ Add slider/banner to top of page

Hero Template *

Secondary Page Banner ▼

Images	Order
Image  Image Preview  Fun times.jpg (126.15 KB)  Click and drag the crosshair to target the most important portion of the image. This portion of the image will never be cropped. Title Description Link Text (128 characters maximum) Link URL	1 ▼

2.
3.

4. Slider/Banner:

Add Title, Description, Link Text, and Link URL as needed.

Home Page Slider: Only shows Title, Link Text, and Link URL.

Secondary Page Banner: Includes Title, Description, Link Text, and Link URL. View the location of these below.

▼ Add slider/banner to top of page

Hero Template *

Secondary Page Banner ▼

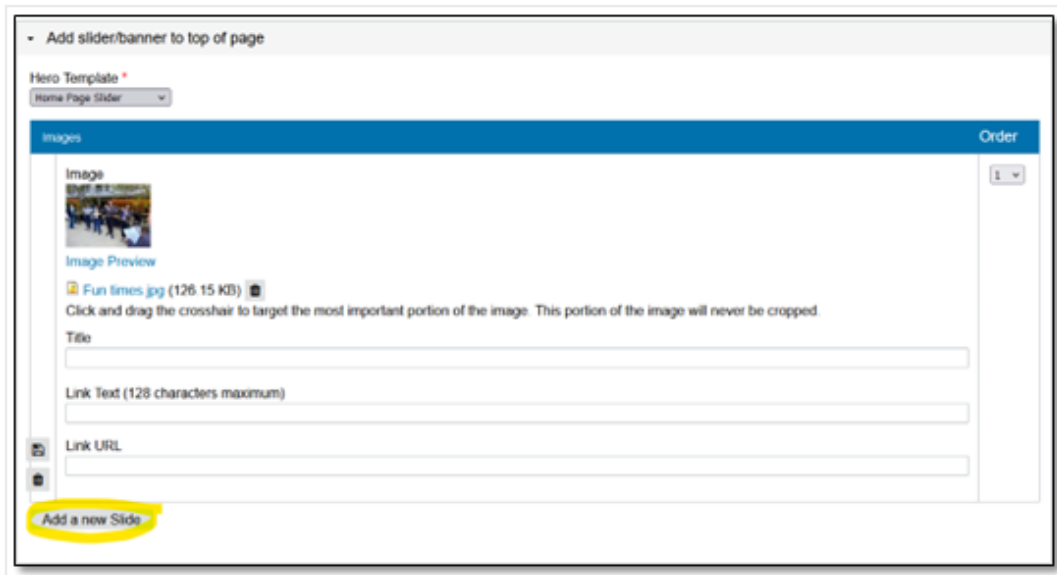
Images	Order
Image  Image Preview  Fun times.jpg (126.15 KB)  Click and drag the crosshair to target the most important portion of the image. This portion of the image will never be cropped. Title Description Link Text (128 characters maximum) Link URL	1 ▼

5.
6.

View samples of how the text will appear in Step 4 on the Slider/Banner.

7. Slider/Banner:

For the Home Page Slider, add additional slides through the 'Add a new Slide' button.



8.

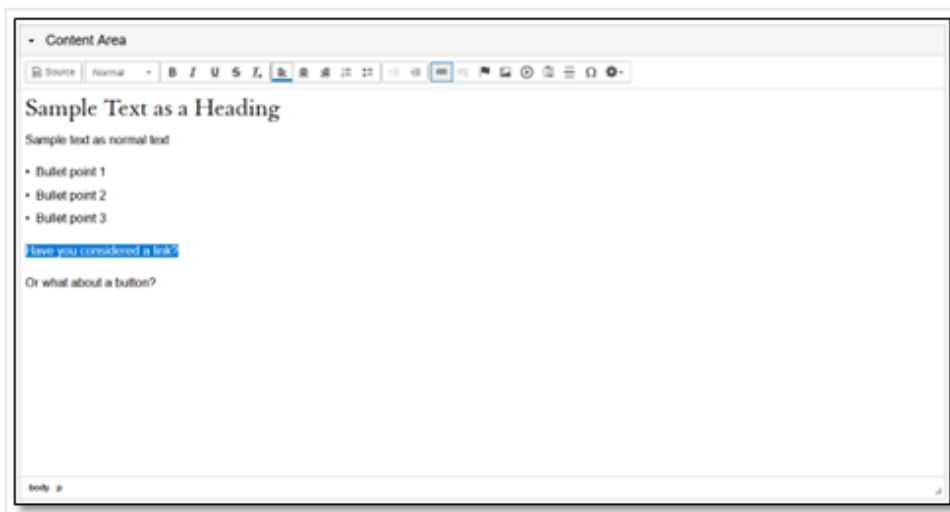
9.

10. Content Area - Insert a Link:

This is where you will enter all your page-specific content. This guide will walk through adding links, anchors, Images, videos, quotes, columns, featured content, and a collapse item (often called an accordion).

11. Content Area - Insert a Link:

Highlight the text you want to become a link and click the chain-link icon.



12.

13.

14. Content Area - Insert a Link:

Select the Link Type in the dialogue box window that appears:

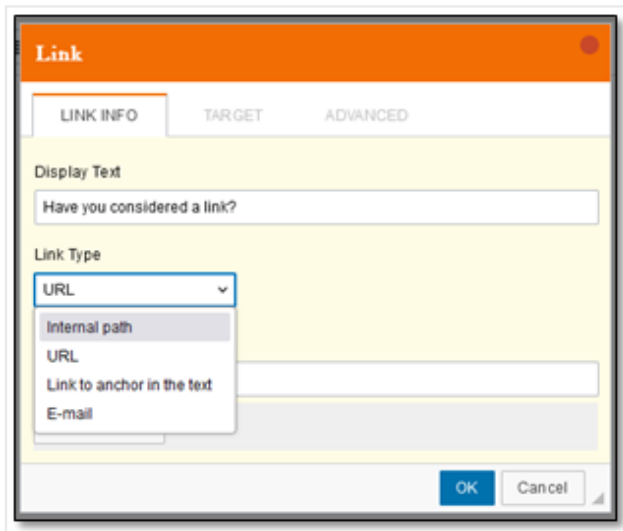
Internal path – another page on your website.

URL – any webpage on the internet.

Link to anchor in the text – if you have added an anchor .

E-mail – select recipient, message subject, and begin message body.

Add Content – Content Area: Insert a Link.



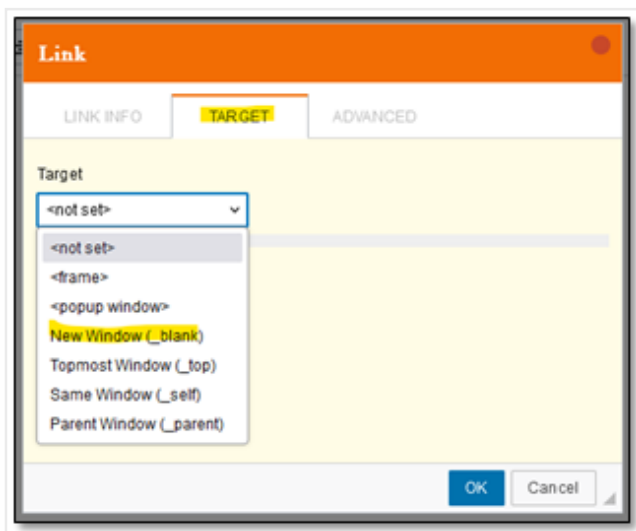
15.

16.

17. Content Area - Insert a Link:

Under 'Target', set how the link will open.

Suggest 'New Window' for all.



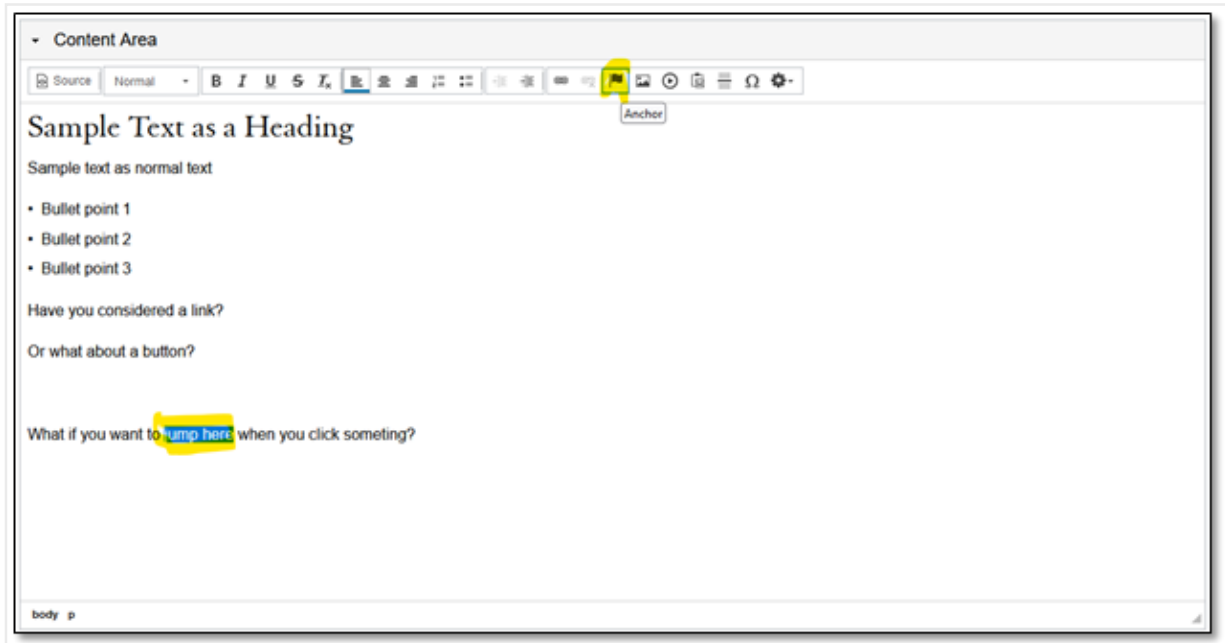
18.

19.

20. Content Area - Anchor:

An Anchor is a place that can be linked to from the same page it is on. If you have a long page with lots of text/scrolling, creating a link to an anchor will let users jump to the part of the webpage they want to see.

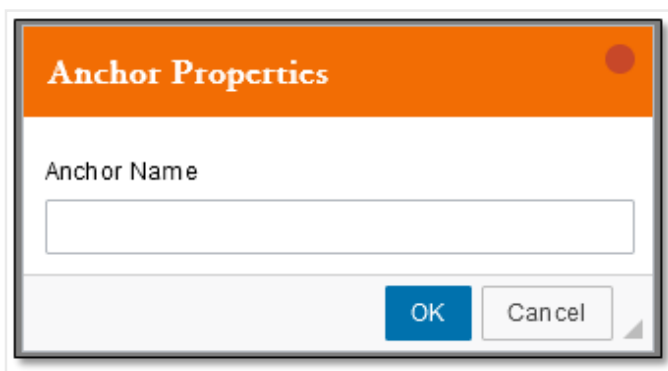
Highlight the text of the location you want to jump to, and click the anchor (flag) icon.



21.
22.

23. Content Area - Anchor:

From the dialogue box that appears, name your anchor and press okay.

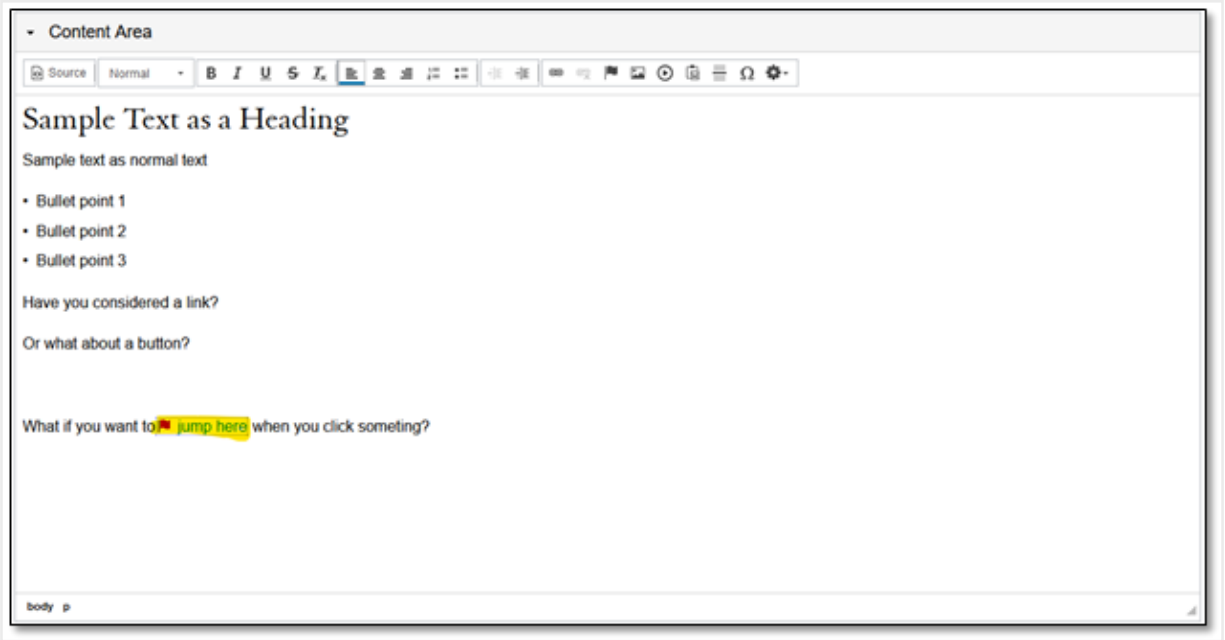


24.
25.

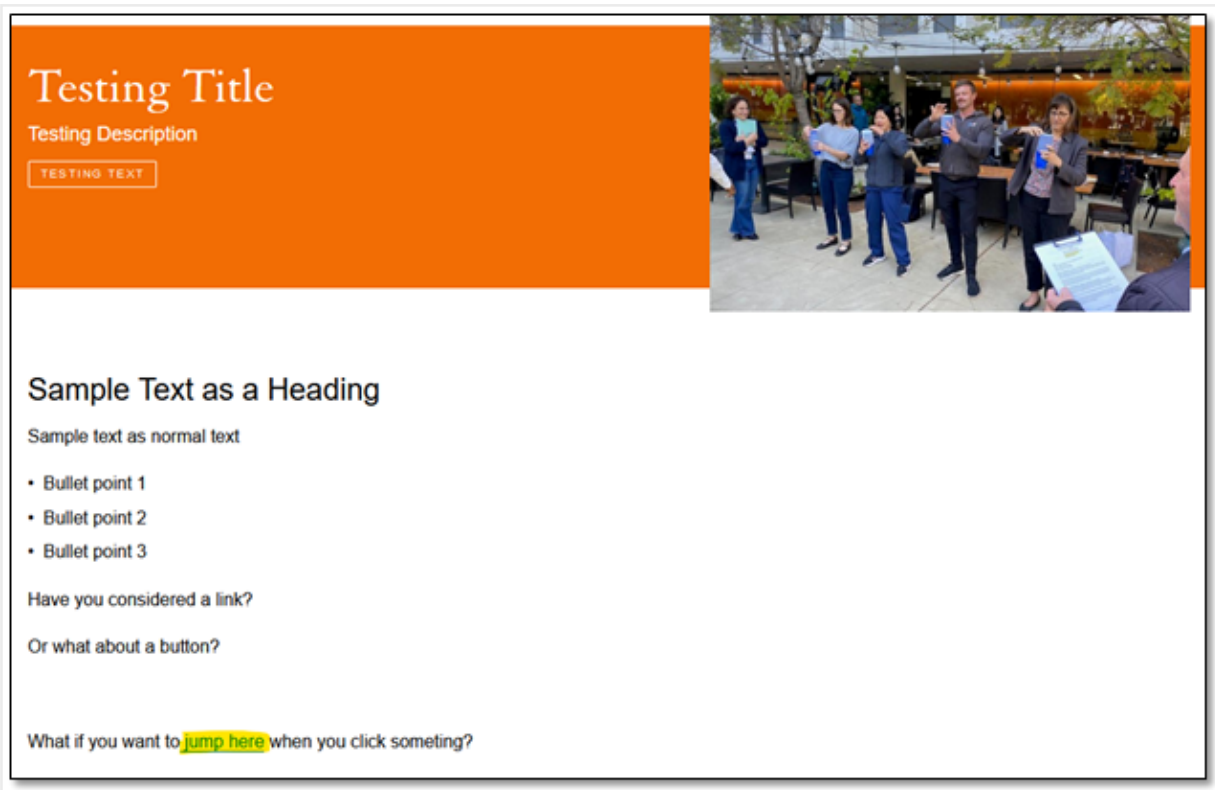
When inserting a link, you will now be able to select this point if linking to an anchor.

The anchored text will appear on a flag when editing, but will not be visible when published.

Editing View:

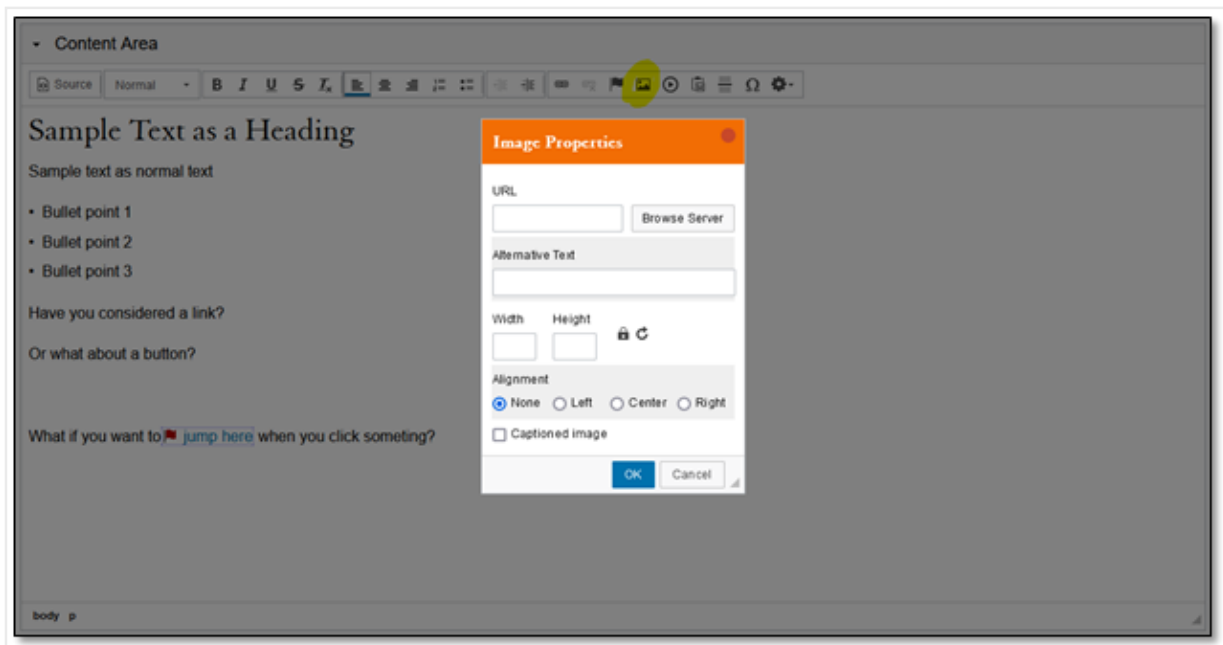


Save view:



1. Content Area - Image:

Click the Image icon, and the Image Properties dialogue box will appear.



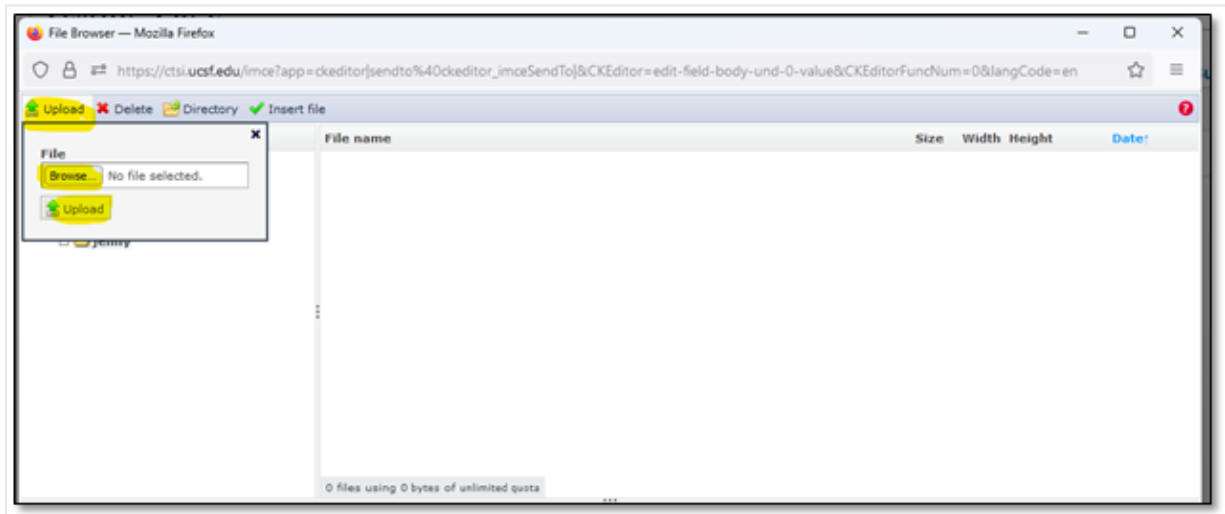
- 2.
- 3.

4. Content Area - Image:

Select the image by clicking 'Browse Server'

5. Content Area - Image:

Click Upload, then click Browse and find your image, and once you have selected the image, click 'Upload'



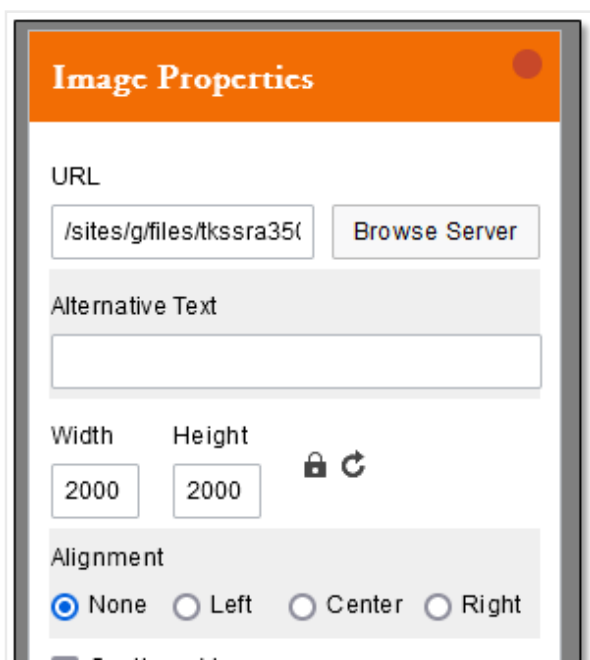
6.
7.

1. Content Area - Image:

Once the file uploads, click on the image to select it.

2. Content Area - Image:

The Browse server dialogue box will automatically close, and the Image Properties dialogue box will have the image server URL populated. Choose Alternative Text, size, alignment, and add a caption if needed. Click OK when the selection is complete.



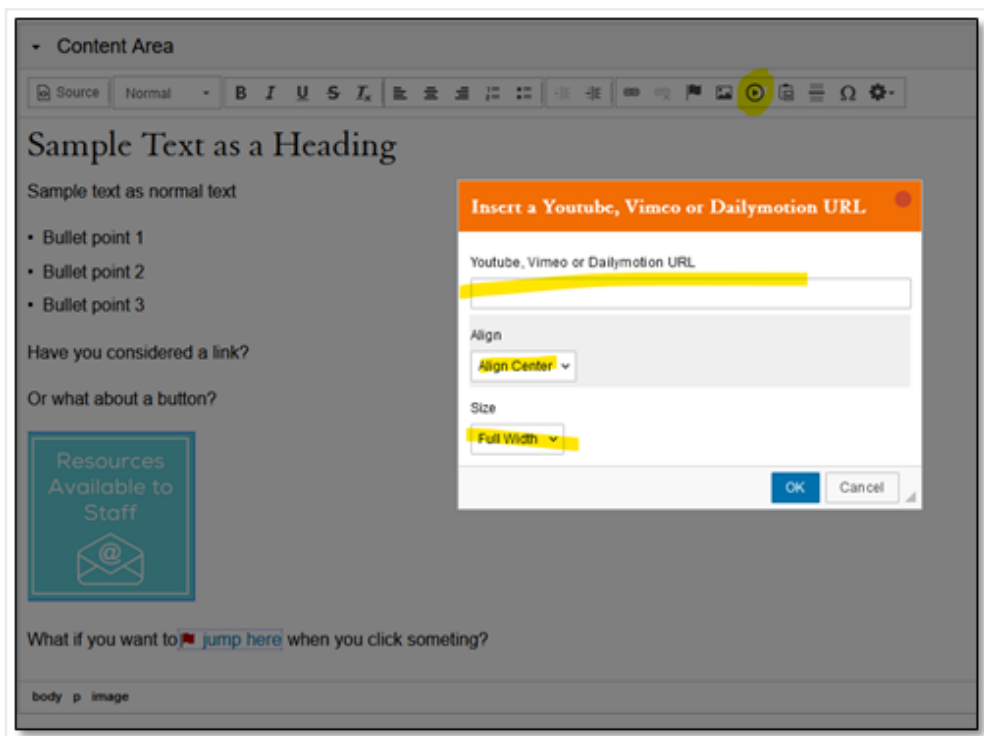
4.

5. Content Area - Image:

If you would like to change the Image Properties of an already inserted image, simply double-click the image and the Image Properties window will reappear.

6. Content Area - Video:

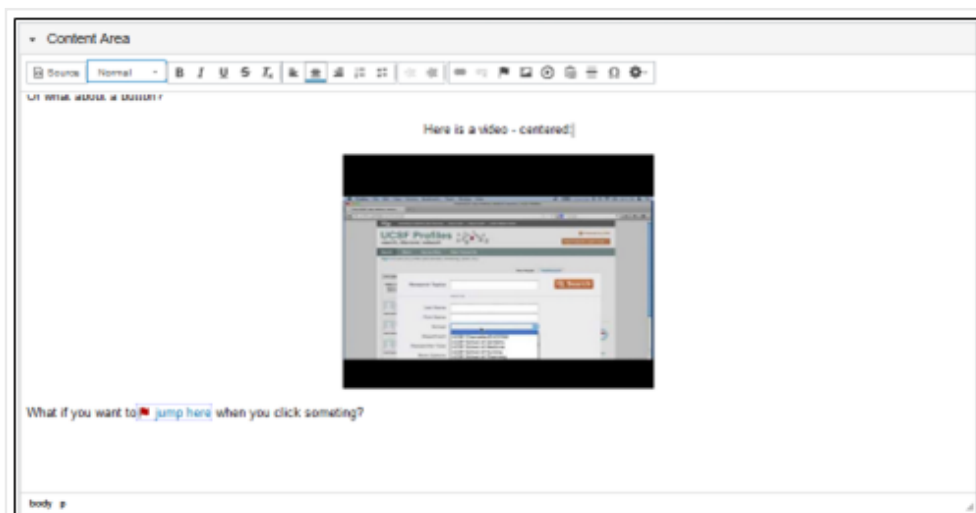
Click the play button and enter the YouTube, Vimeo, or Dailymotion URL, alignment (recommend avoiding full width), and size. Click OK when the selection is complete.



7.

8.

End result:

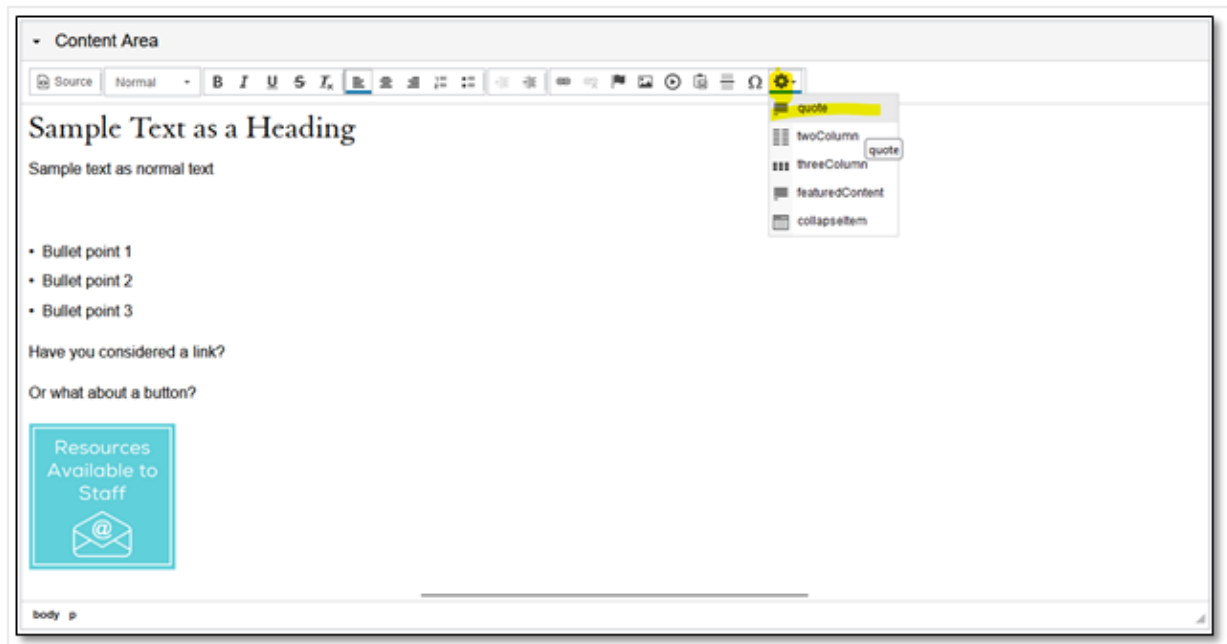


9

10.

1. Content Area - Quote:

Click the Cog, then click 'quote'.

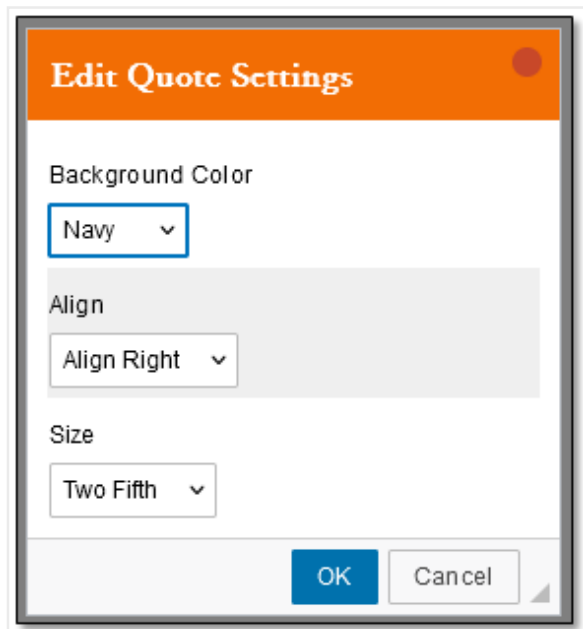


2.
3.

4. Content Area - Quote:

'Edit Quote Settings' dialogue box will appear.

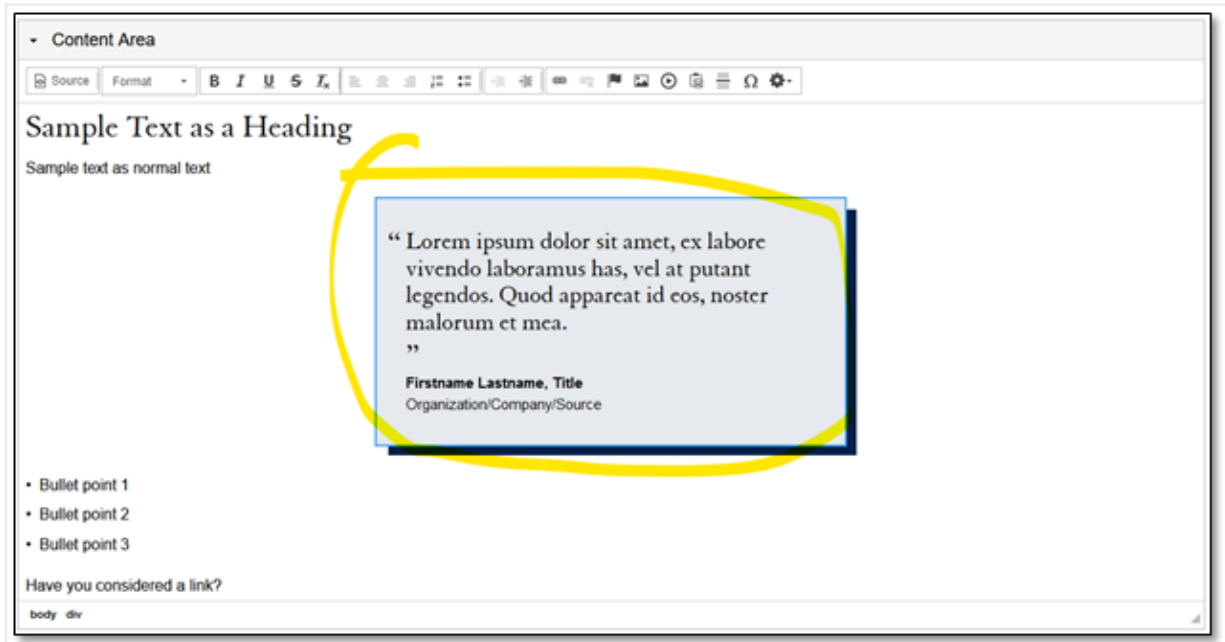
Select Background Color, Alignment, and Size, then click OK.



5.
6.

1. Content Area – Quote:

The 'Edit Quote Settings' dialogue box will automatically close, and you can insert details of your quote like a normal text box.

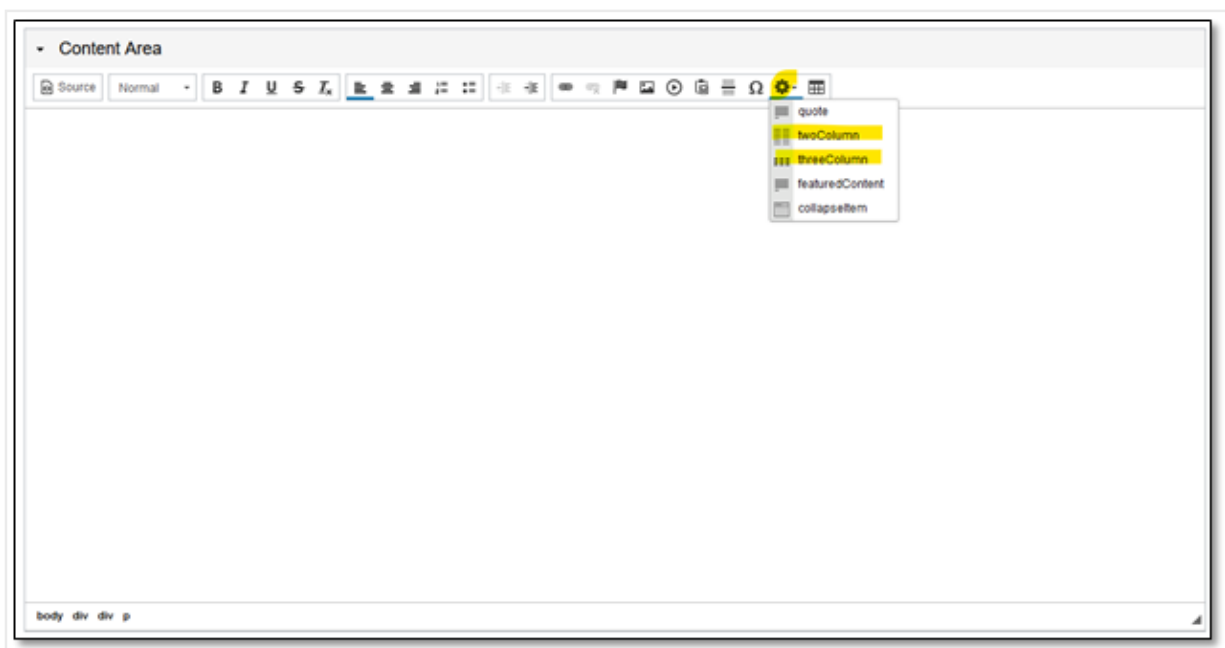


2.
3.

4. Content Area – Columns (2 or 3, same instructions):

Columns provide structure options for the page.

Click the Cog, then click 'twoColumn' or 'threeColumn' depending on your need for the page.

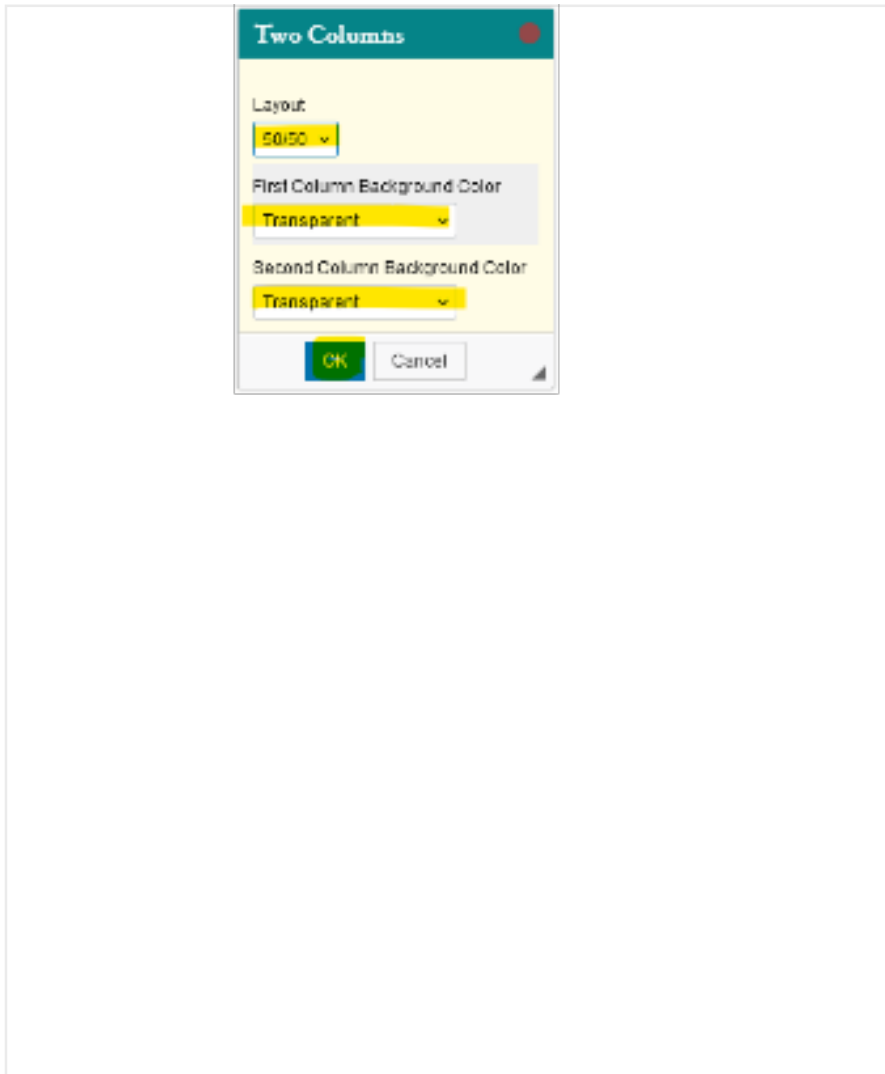


5.

6.

7. Content Area – Columns:

In the dialogue box that appears, decide on the layout and background transparency, then click 'OK'



8.

9.

10. Content Area – Columns:

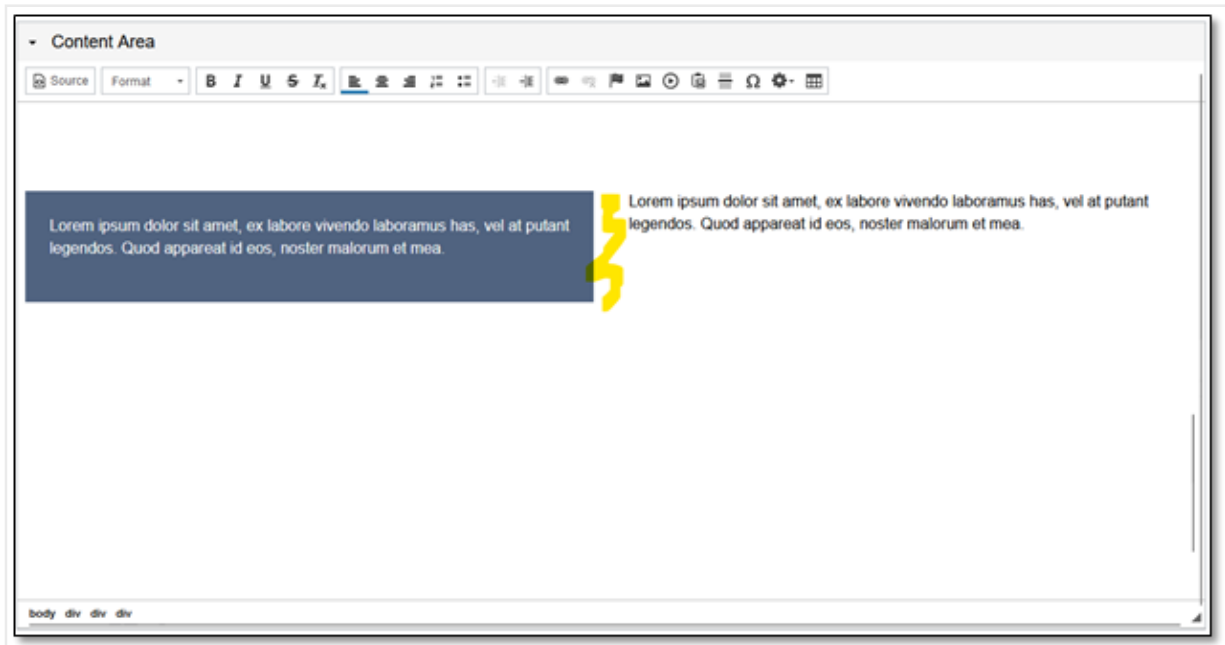
A column with placeholder text will be inserted.



12.

1. Content Area – Columns:

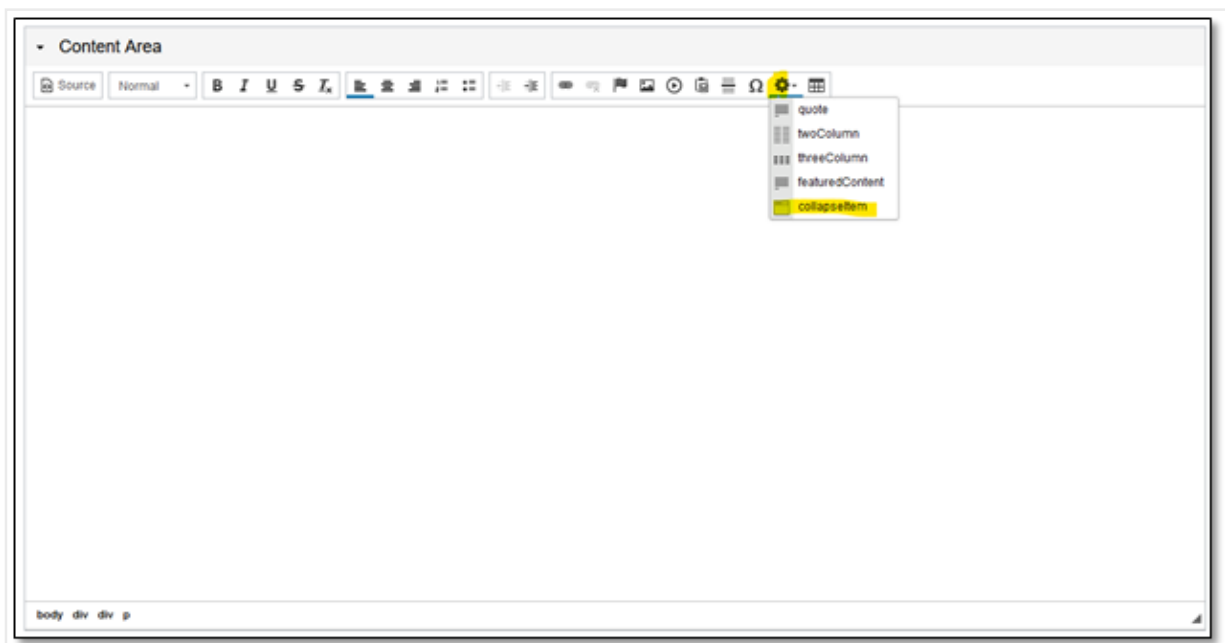
If you would like to change the column settings in the dialogue box, click on the space between the columns to re-enter the Columns dialogue box.



2.
3.

4. Content Area – collapseltem (Accordion):

These collapseltems are good for tucking information away, and allowing site visitors to expand sections they are interested in. Click the Cog, then click 'collapseltem'.



5.

6.

7. Content Area – collapseltem (Accordion):

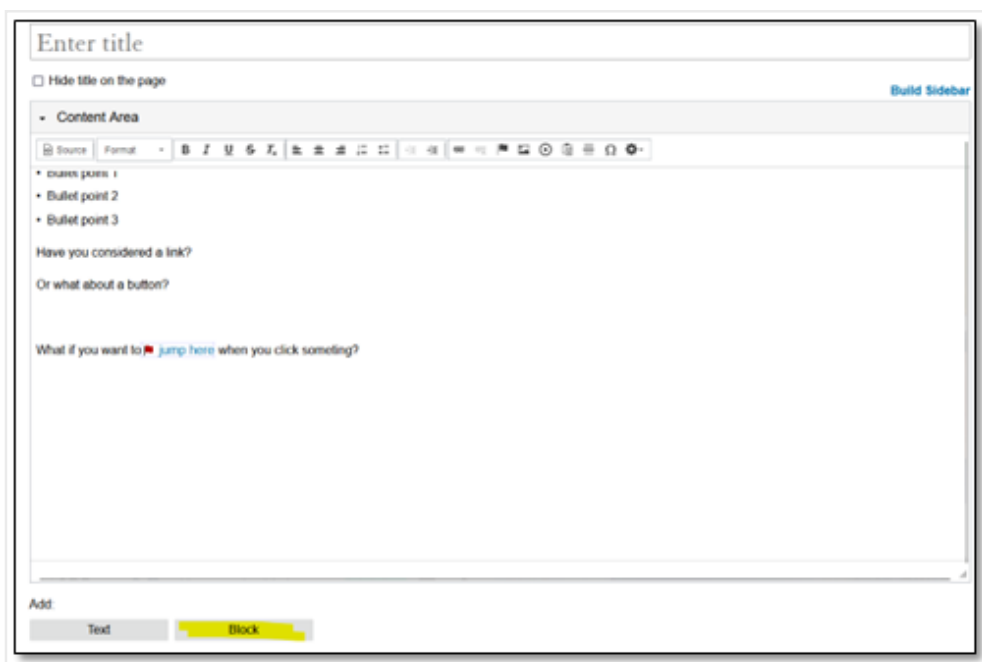
The collapse item will appear with the title of 'Item 1'. When you click on the gray bar of 'Item 1', the item will expand to show the content area, where 'Enter content' appears.

Personalize the 'Item 1' and 'Enter content' fields.



1. Add a Block: You can add previously created blocks or views by clicking the 'Block' button under 'Add:' under the Content Area box.

Learn more about Blocks in the 'What is a Block' section



2.

3.

4. Add a Block: Select the block from the drop-down window:

The screenshot shows a user interface for adding a block. At the top is a blue header bar with 'Add.' on the left and 'Order' on the right. Below this is a table-like structure. The first row has a blue header 'Block Widgets' and a column 'Order' with a dropdown set to '1'. Below the header, there is a row with a dropdown menu showing 'Training' (highlighted in yellow) and an 'Order' dropdown set to '0'. Below this row is a button labeled 'Add another item'. At the bottom of the interface are two buttons: 'Text' and 'Block'.

5.

6.

7. Add a Block: Add as many blocks as you want by using the 'Add another item' button.

Please note: the 'Order' number denotes the order in which the blocks/ views are displayed – the smaller the number, the higher up it appears (starts with 0, then 1, then 2, etc.)

This screenshot shows the 'Add' block widget interface after adding two items. The table now has two rows. The first row has 'Training' in the dropdown and '0' in the 'Order' dropdown. The second row has 'Community Engagement Toolkit' in the dropdown and '1' in the 'Order' dropdown. The 'Add another item' button is still visible at the bottom of the table area.

8.

9.

10. Publish Page – Menu settings:

Menu setting: select if Page should appear on the website – this is almost always yes.

The screenshot shows the 'Menu settings' page. At the top, there is a section 'Menu settings' with a sub-section 'Not in menu' and a button 'Provide a menu link'. Below this is a list of settings: 'Revision information' (New revision), 'URL redirects' (1 enabled redirect), 'Comment settings' (Closed), 'URL path settings' (Automatic alias), 'Authoring information' (By nmiller on 2025-06-24 21:47:41 -0700), and 'Publishing options' (Not published). At the bottom are 'Save' and 'Delete' buttons.

11.

12.

If you do not provide a menu link, the page will not be navigable from your website and will only be accessible by direct URL link. This is useful for testing and for temporary/discrete linking (the webpage can still be found by search engines!).

Useful/permanent pages will select 'Provide a menu link' once ready to share.

13. Publish Page – Menu settings:

Choose where the new page should live:

Menu link title: this is what the link will look like in the navigable menu (may be different from Page Title, or the same)

Description: Shown when hovering over the menu link – keep this short if using.

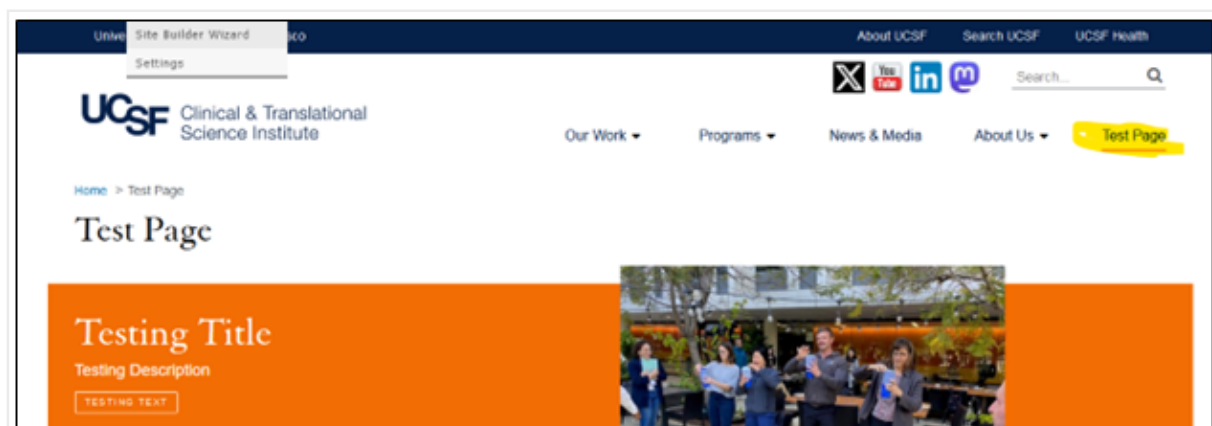
Important Parent item: This is under what other Menu item this page will appear in. For example, if you have a menu item of 'Publications', and this is a new page about 'Publication Y', the Parent item of the new page would be Publications.

The screenshot shows the 'Menu settings' form for a 'Test Page'. On the left is a sidebar with sections: 'Revision information' (New revision), 'URL redirects' (1 enabled redirect), 'Comment settings' (Closed), 'URL path settings' (Automatic alias), 'Authoring information' (By nmler on 2023-06-24 21:47:41 -0700), and 'Publishing options' (Not published). The main area has a checkbox 'Provide a menu link' which is checked. Below it are fields for 'Menu link title' (containing 'Test Page'), 'Description' (containing 'Test Page'), and 'Parent item' (a dropdown menu showing '<Main menu>'). There is also a 'Weight' dropdown set to '0' with a note: 'Menu links with smaller weights are displayed before links with larger weights.' At the bottom are 'Save' and 'Delete' buttons.

14.

15.

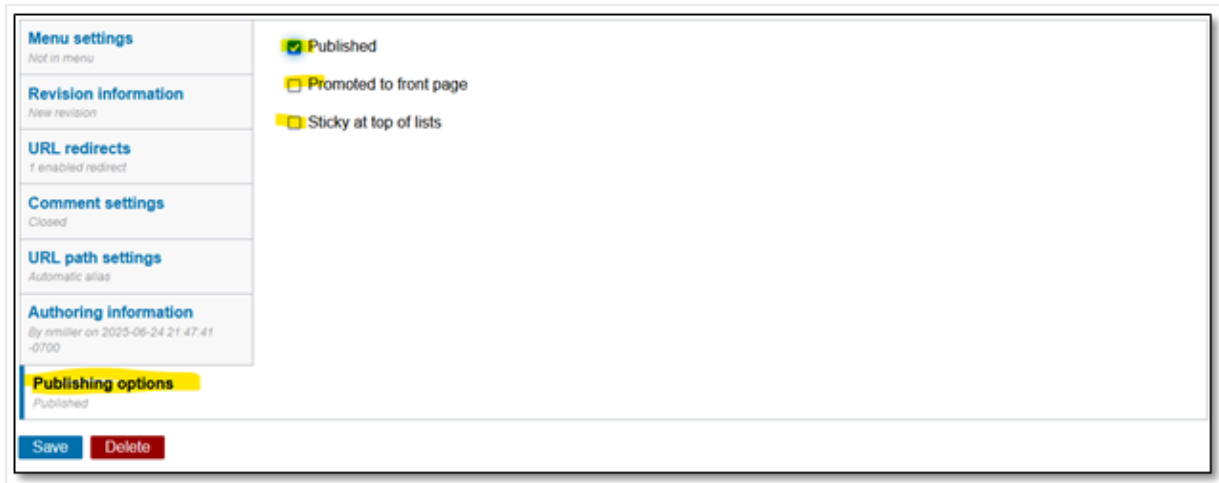
If you select '<Main menu>' for the Parent item, the webpage will appear in the top navigation Menu:



17.

1. Publish Page – Publishing options:

Select 'Published', 'Promoted to front page', and/or 'Sticky at top of lists' as needed.

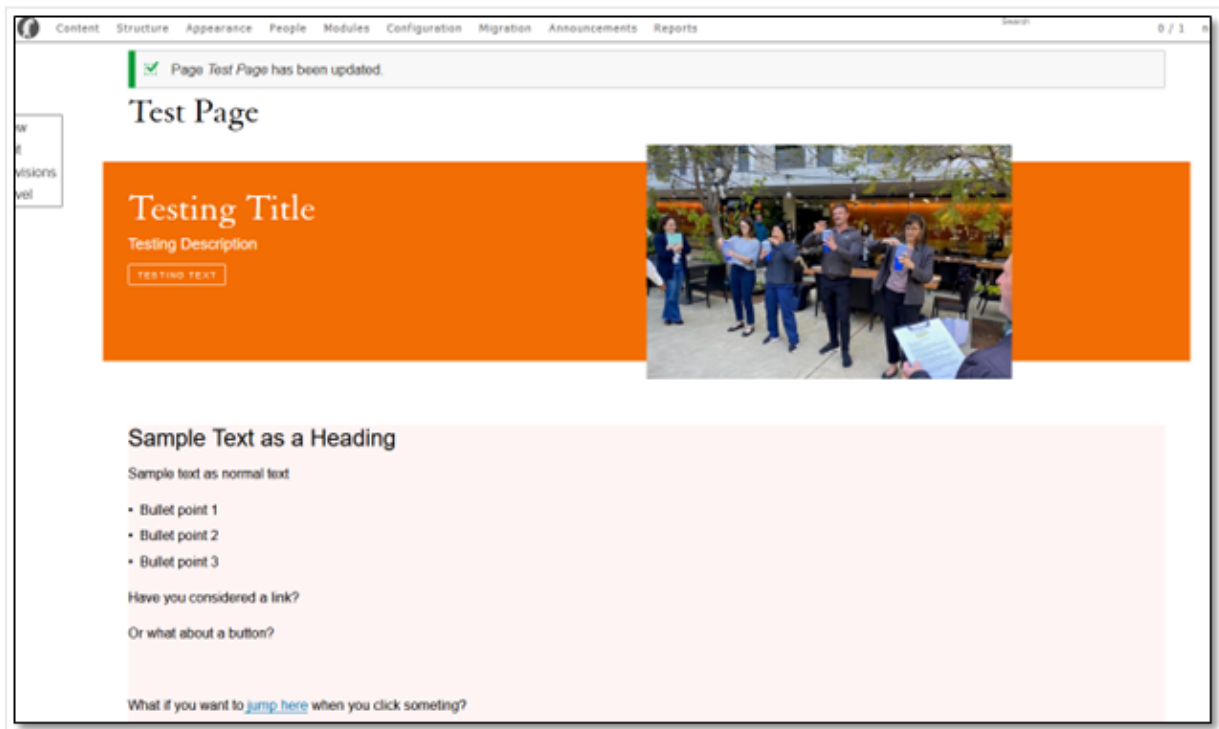


The screenshot shows the 'Publish Page' form in Drupal. On the left is a sidebar with menu items: 'Menu settings' (Not in menu), 'Revision information' (New revision), 'URL redirects' (1 enabled redirect), 'Comment settings' (Closed), 'URL path settings' (Automatic alias), and 'Authoring information' (By nmler on 2023-06-24 21:47:41 -0700). The main area contains three checkboxes: 'Published' (checked), 'Promoted to front page' (unchecked), and 'Sticky at top of lists' (unchecked). At the bottom are 'Save' and 'Delete' buttons.

2.

3.

If you deselect 'Published', the page will still be viewable to those with a URL address, but it will not appear in the menu items. The page content will also have a pink background to remind the editor that the page is not published.



The screenshot shows the 'Test Page' in Drupal. At the top, a message says 'Page Test Page has been updated.' The page title is 'Test Page'. Below it is a large orange banner with the text 'Testing Title' and 'Testing Description'. To the right of the banner is a photo of a group of people. Below the banner is a section titled 'Sample Text as a Heading' with a pink background. This section contains sample text, a bulleted list, a link, and a button. At the bottom, there is a note about jumping to a link.

4.

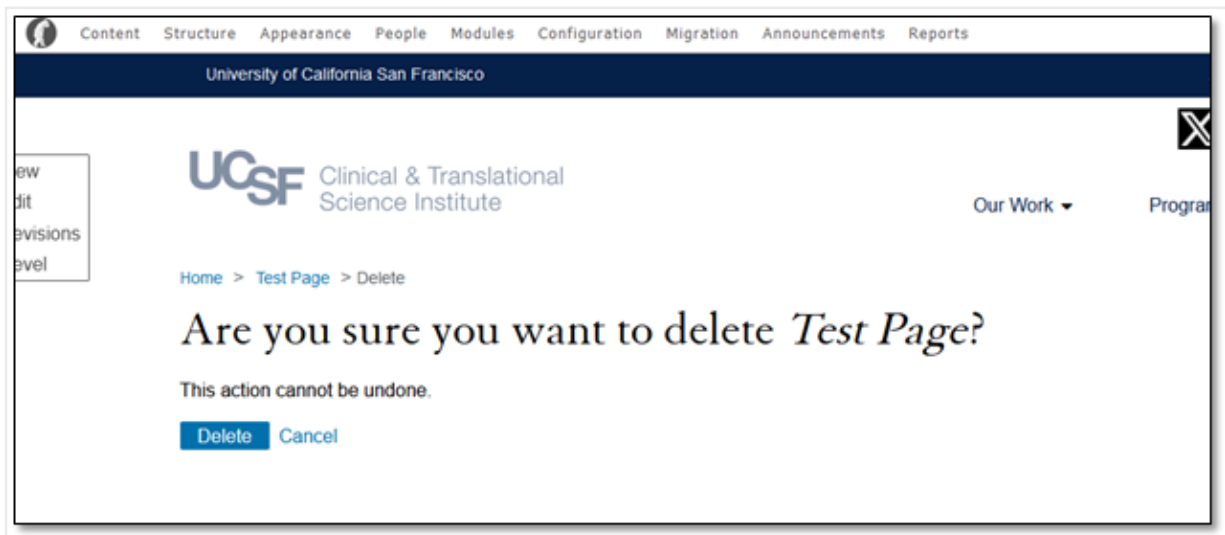
5.

1. Publish Page: A reminder on what 'Save' means

When you click Save, all changes are immediately live and viewable online.

2. Publish Page: Delete button

The Delete button will delete the page completely (not undo any changes). There will be a confirmation screen to turn back in.



3.

4.

Edit an Existing Page

1. Navigate to the page you would like to edit.

2. On the top left corner of the page, there will be a constant box that has the following options:

View, Edit, Revisions, Devel.
Select Edit.

3. Edit the page normally, same as instructions in 'Create a New Page + Page Editing Options'

What are Blocks?

A "block" is a Drupal term; think of it as a building block of content you can add to any page.

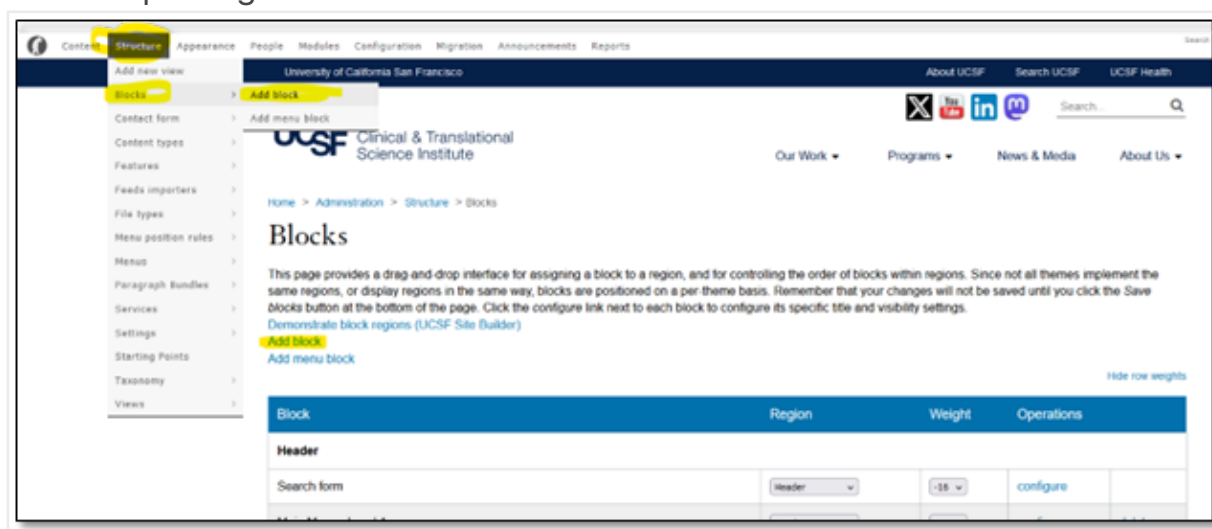
Blocks can be used as Headers, Content, sidebars, and footers.

Blocks are especially useful for repeating information. For example, if you would like every page to have a reminder at the bottom about who to contact for more information, you can add a 'contact' footer to all pages on the website. Instead of copy + pasting that content to every new page, it would automatically be applied to all pages.

Blocks are also useful for single-use content, like special sidebar links to resources on one specific page.

Create a Block:

1. At the top navigation select Structure > Blocks > Add block



- 2.
- 3.

A new Block will be created.

1. Add Block title, description, and body.

1. Set a 'REGION SETTINGS' for the Block – this will decide where it shows up on the page:

Header: Goes at the very top of the webpage, where the logo/main menus are.

Content Top: Goes at the top of the content area of a page (below any slider/banner).

Content: Goes in the content area (would show up below any Content Top category Blocks).

Sidebar Top: Goes on the top of the right-hand side, as a skinnier sidebar for more information.

Sidebar: Goes on the right-hand side, as a skinnier sidebar for more information (would show up below any Sidebar Top category Blocks).

Footer: At the bottom of the webpages, usually evergreen material for all

website pages.

Footer Bottom: At the very bottom of the webpages, below any Footer category Blocks.

Help – do not use.

Highlighted – do not use.

1. Select on what pages the block will show under 'Visual settings' in the 'Pages' section:

All pages except those listed show up on all website pages.

Only the listed pages show up on the specified pages.

****IMPORTANT*:** When using 'Only the listed pages' setting, you must list the pages by the URL trailing the homepage URL.*

Example: If you want the block to only appear on the following webpage:

<https://ctsi.ucsf.edu/about-us/celebrates>

Under 'Only the listed pages' you would write 'about us/celebrates' (without the quotation marks)

- 2.

- 3.
4. Save Block and review to make sure Block shows up only on the desired pages.

Review Blocks and Edit Existing Blocks

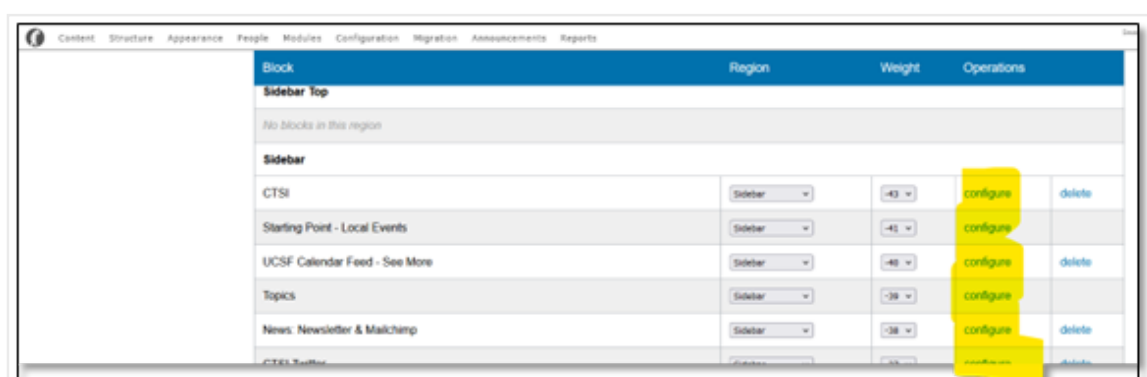
1. To all Blocks, at the top navigation bar, go to Structure > Blocks.
This will showcase all currently used blocks under: Header, Content Top, Content, Sidebar Top, Sidebar, Footer, Footer Bottom, Help, Highlighted, and Disabled. Disabled blocks are not currently showing anywhere.



- 2.
- 3.

Troubleshooting If you created a block and it is 'stuck' under disabled/you cannot find it on the webpage, configure it and set what pages you want it to show on Visibility Settings and set a REGION SETTINGS.

4. The 'Weight' column sets how far up the page/section a Block appears. The lower the number, the higher it appears.
5. To edit a Block, click on 'Configure' of the individual Block you want to edit.

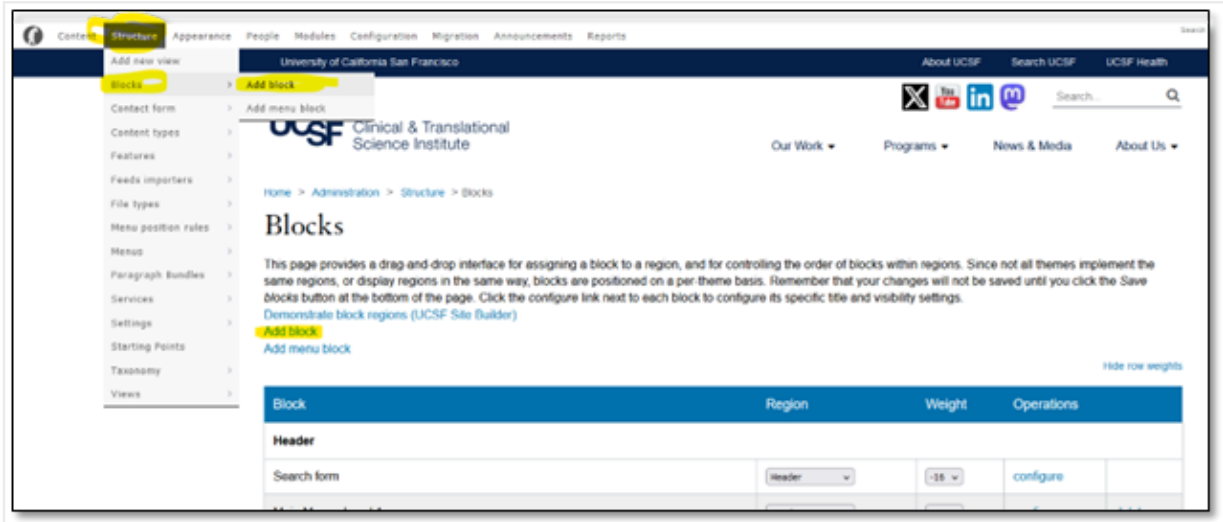


7.

Add a Sidebar

There are two options for adding a sidebar: From Navigation, and from a Page.

1. [From Navigation – same as How to Create a Block Instructions] At the top navigation select Structure > Blocks > Add block.



2.
3.

A new Block will be created.

1. [From Navigation] Add Block title, description, and body.
2. [From Navigation] To make the Block a Sidebar, in the 'REGION SETTINGS' region, select it as a Sidebar or a Sidebar Top.



3.
4.

5. [From Navigation] Select where the side bar will show on the Pages section of the Visibility settings. Then save the block. A reminder that you can have multiple Blocks be sidebars on a single page.

Visibility settings

Pages
Not restricted

Content types
Not restricted

Roles
Not restricted

Users
Not customizable

Show block on specific pages

☒ All pages except those listed

☐ Only the listed pages

Specify pages by using their paths. Enter one path per line. The "*" character is a wildcard. Example paths are blog for the blog page and blog/* for every personal blog. <front> is the front page.

Save block

1. [From Navigation] Save Block and review to make sure Block shows up only on the desired pages.

Add a Sidebar from a Page – **Block must already be created:**

1. [From a Page] Navigate to the page you want to add a Sidebar to.
2. [From a Page] When signed in, click the hovering option on the left-hand side to 'Edit' the page.



- 3.
- 4.
5. Click 'Build a Sidebar' by the Content Area.



7.

8. Select your desired pre-built Sidebar (view earlier instructions on how to build a new Sidebar).

9. Save Page.

Add a Menu Block

1. Info – What is a Menu Block: A Menu Block is a Block that automatically shows the pages that are nested under a page. This is nice if you have a topic page, with many related pages that are nested underneath it.

Example use:

Event Landing Page

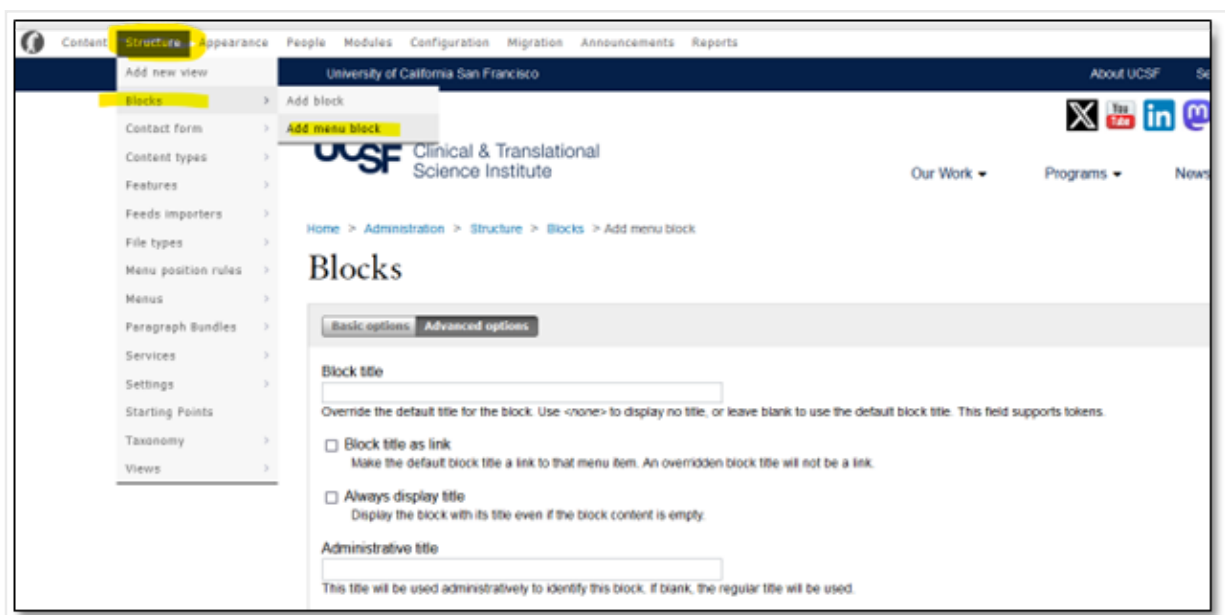
Agenda (nested under Event Landing Page)

Abstracts (nested under Event Landing Page)

Past Event Recordings (nested under Event Landing Page)

In this example, a Menu Block would create an automatic sidebar to showcase the landing page and all the nested pages, instead of having to build them with individual links in a sidebar.

2. To add a Menu Block, from the top navigation, go to Structure > Blocks > Add menu block.



3.

4.

5. Click through to the 'Advanced Options' on the Block.

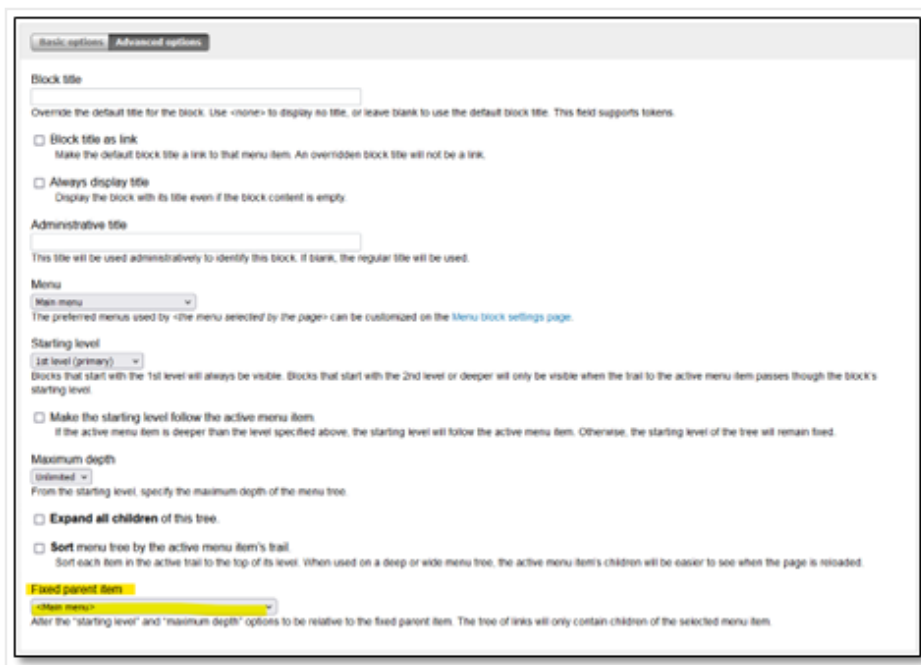


6.

7.

8. Fill out Block Title, Admin title, and any of the other settings that are useful for your webpage.

9. Fixed parent item: The place where the menu block will show will be decided using the 'Fixed parent item' section. Select your 'landing page'/umbrella page for the menu. This should be the page that has other pages nested under, having been selected as the Parent Item for those other pages.



10.

11.

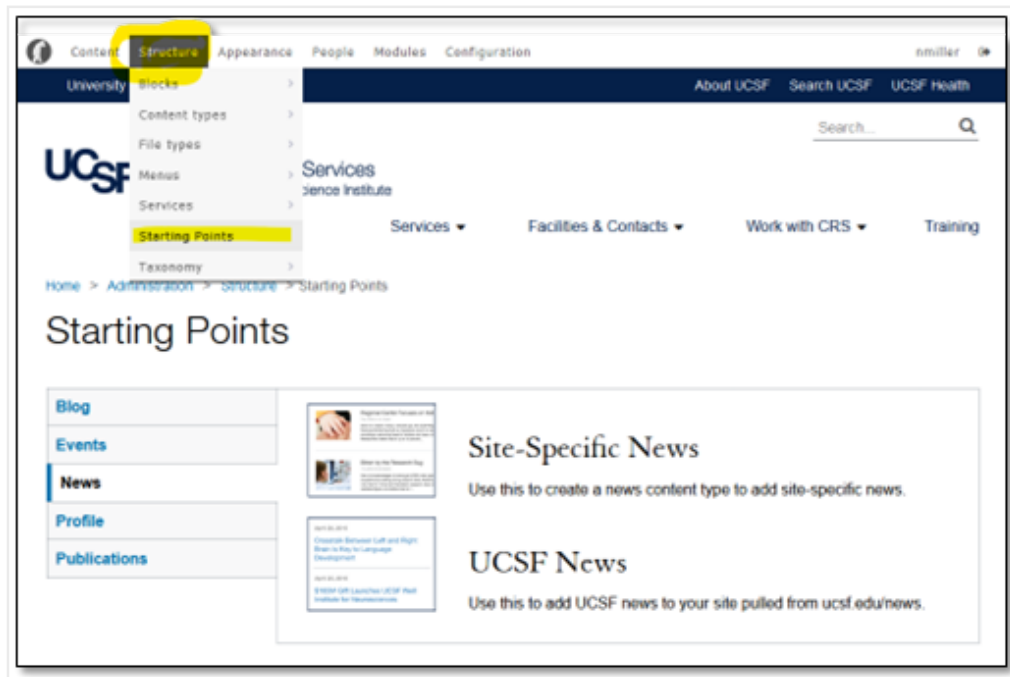
12. Under Visibility settings, on the Pages section, select what pages the

block should appear on.

13. Click 'Save block'.

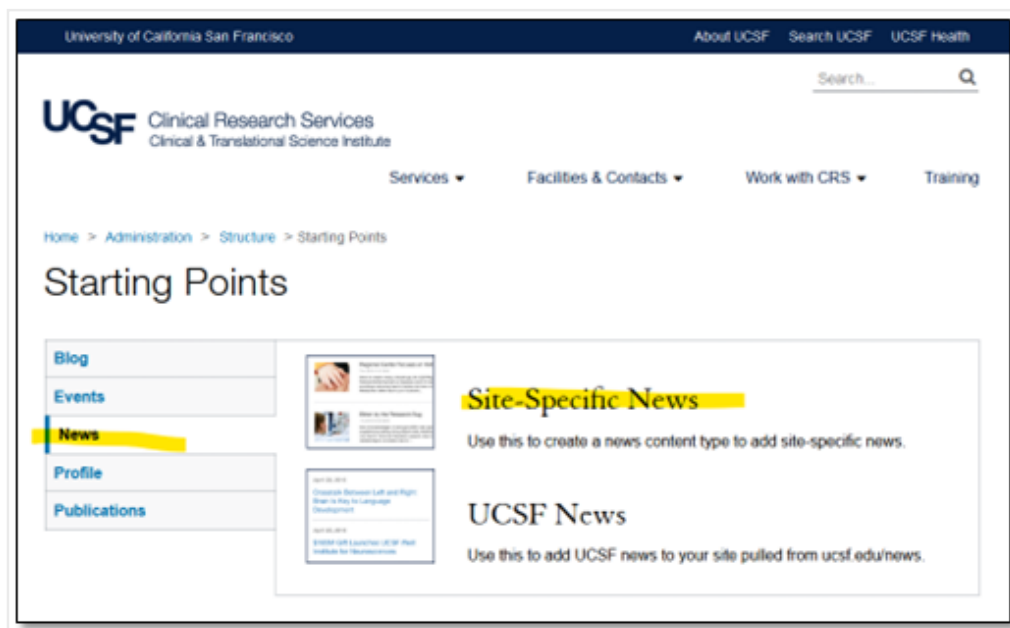
Create News Page

1. To create a page specifically to show News about your organization/ created by your team, go to: Structure > Starting Points.



- 2.
- 3.

4. On the Starting Points page, click 'News', then Site-Specific News.



- 5.
- 6.

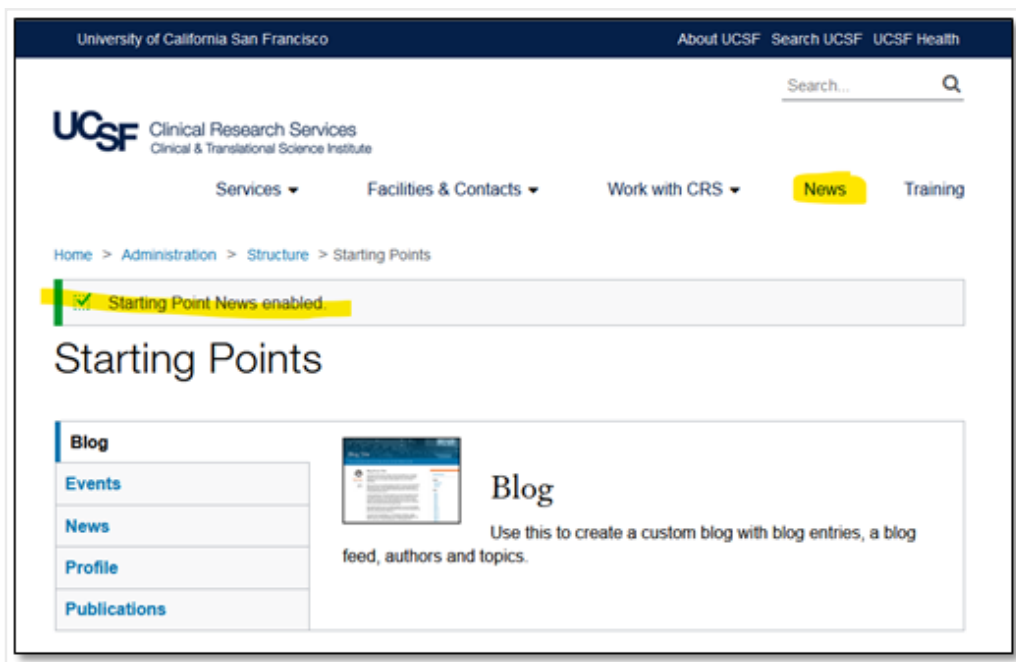
7. Click 'Create Starting Point'



8.

9.

10. A news menu item will automatically appear in your main menu, and you can change the name of the menu item, move it, or even delete it altogether.

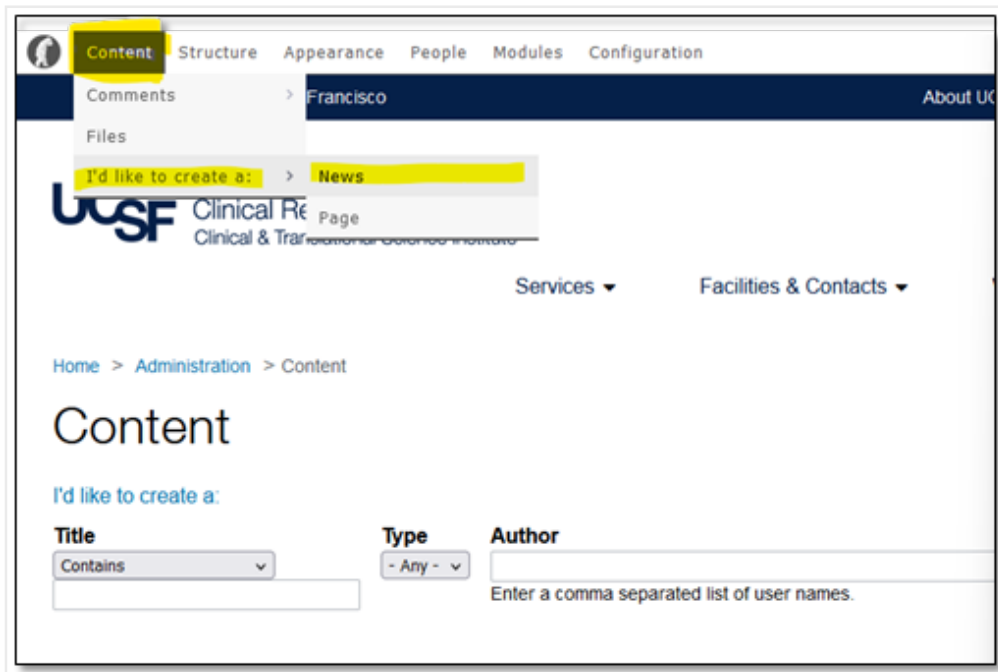


11.

12.

Create a News Article

1. On the navigation, select Content > I'd like to create a > News.

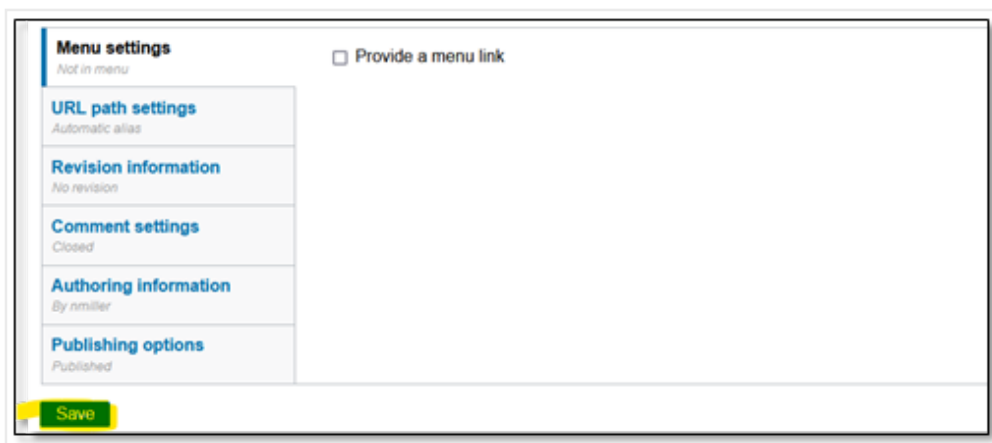


- 2.
- 3.

4. Enter all the details for the News page, including title, topics, body, Image, and URL path, or author specifications.

**IMPORTANT NOTE* You do not need to provide a Menu link – this will automatically show up in the automatically created News page, and any News widget you have on the website.*

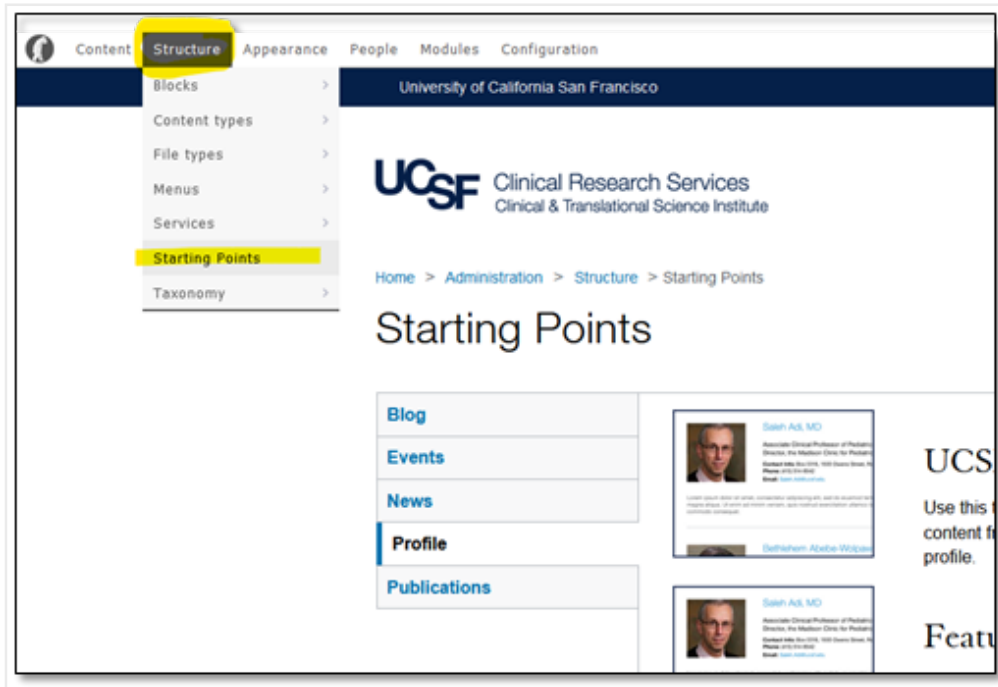
5. Click 'Save' at the bottom.



- 6.
- 7.

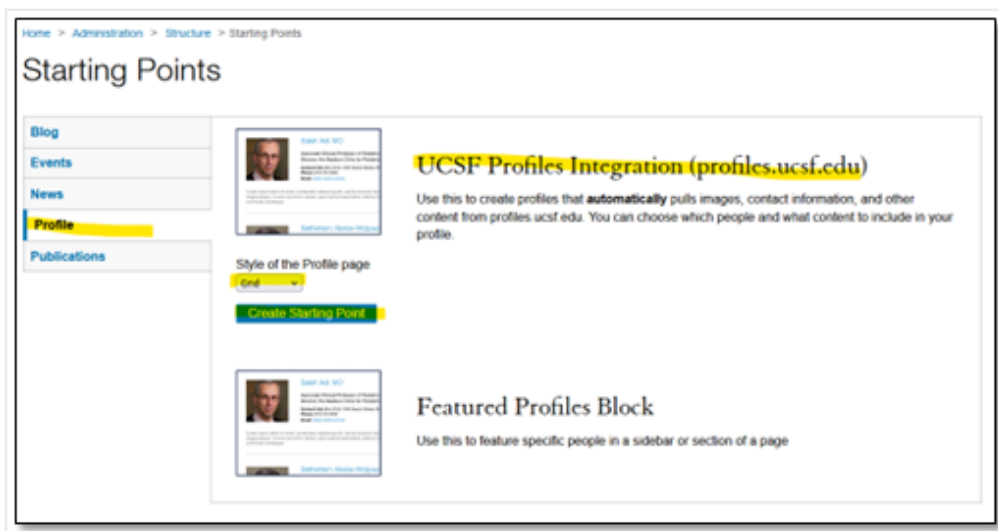
Make a People Page (Also known as Team Page)

1. At the top navigation, go to Structure > Starting Points.



2.
3.

4. Click Profile, and then UCSF Profiles Integration. Select the Style of the Profile Page:
Choosing Grid will create a structure with 3 profiles across, and choosing Expanded will have one person across (with more details).



5.
6.

7. This will automatically create a People Page at the top menu of your website.



9.

Add People to the People Page

1. At the top navigation, go to Content > I'd like to create a: > UCSF Person

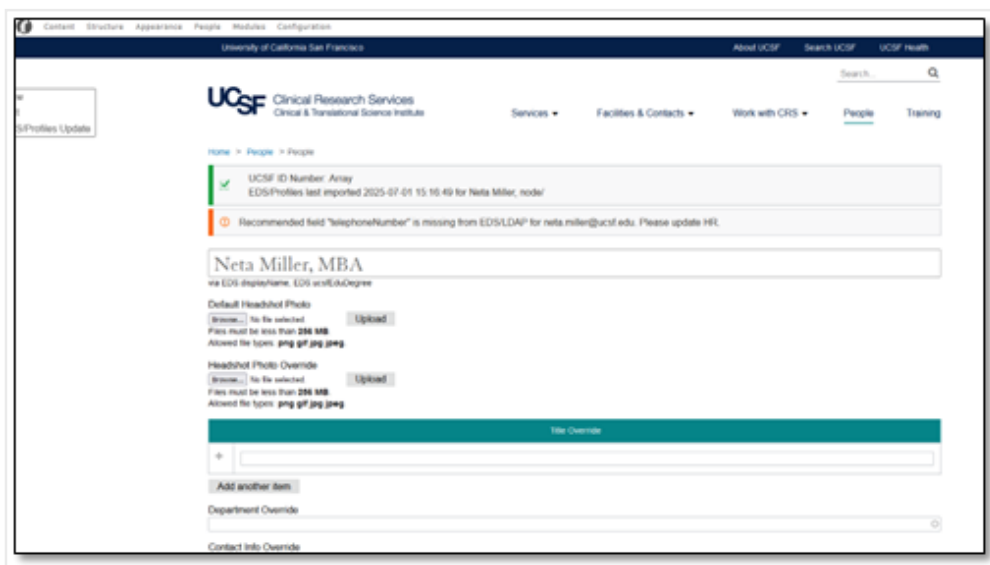


2.

3.

4. Enter that individual's email address and click Submit.

5. A People profile will be created from Profiles data. Please override or add details as needed.



6.

7.

There is no need to provide a menu link, as it will automatically be pulled

to the People page.

8. Click Save when all details are confirmed/entered.



The screenshot displays the 'LDAP Data' configuration interface. On the left, a sidebar contains several expandable sections: 'Menu settings' (with a sub-option 'Not in menu'), 'Revision information' (with 'No revision'), 'Comment settings' (with 'Closed'), 'URL path settings' (with 'Automatic alias'), 'Authoring information' (showing 'By member on 2023-07-01 13:16:43' and '4790'), and 'Publishing options' (with 'Published'). The main content area features a checkbox labeled 'Provide a menu link'. At the bottom left of the main area, there are two buttons: a green 'Save' button and a red 'Delete' button.

9.

10.