

Website Conception with Drupal 6

# **Course 5. User Management and Taxonomy**

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Slides on: <http://www.ludost.org/howto/foss/slides-drupal-course-2009>

# Course Overview

- Access control – users management on the site
  - Roles, access, permissions
- Taxonomy
- Exercises:
  - Create a contact form
  - Set up users roles and permissions
  - Set up a blog
  - Add taxonomy

# Access Control

- **User** - a visitor to the website (ex. visitor, editor, admin).
- **Role** - A group to which users can be assigned (ex. team member, sysadmin). Two default roles: authenticated or anonymous users.
- **Permission** - Something that users within a role can (or can't) do on the website. Permissions by modules. (ex. access site content, edit own blog).  
If no permission: *access denied*.

# Configuring User Access

1) Creating one or more roles to match the types of visitors your website needs to support

Administer->User Management->Roles  
(admin/user/roles)

2) Assigning users to roles

Administer->User Management->Users  
(admin/user/user)

3) Assigning permissions to each role:

Administer->User Management->Permissions  
(admin/user/permissions)

# User profiles and settings

- User's profile page: My Account.
  - Users can change basic settings such as: password, time zone...
  - Lists simple information, such as the username, the length of time the user has been registered on the site.
  - Using the core Profile module, you can add additional fields such as: movies, mission... or change the way this page looks.
- Customisable user options: Administer->User management->User settings (admin/user/settings)

# Handling Abusive Users

- Administrators may change the user's status to **Blocked**, which will prevent them from logging in.
- Users may also be deleted entirely (preferred to block users than deleting them, so that their name stays attached to any content they have posted).
- Administer->User management->Access Rules (admin/user/rules) helps to keep out users by username, email or hostname.

# Hands-on: Creating Roles

- Let't take a moment thinking what users our site will have and what roles we will assign them (with what permissions). Examples:
  - **Owner (us)** - handle writing content and some smaller day-to-day administration of the website. They will need to be able to create and manage content, view logs and statistics, change certain settings. They call this role "editor".
  - **Webmaster** - who will actually build the website, looking after more tech details. Installing and upgrading modules, configuring advanced website settings. "Site administrator"
  - **Members (customers)** - log in and comment on content, but aren't able to post news items themselves (authenticated user) role.
  - **Passing visitors** - only be able to read and search content, comment on news items, and send mail with the contact form (anonymous user).

# Creating Roles (TODO)

- 1) Create "editors" and "site administrator" Administer->User Management->Roles (admin/user/roles).
- 2) Enter editor as a role name and click "Add role".
- 3) Enter site administrator as a role name and click "Add role".
- 4) You can set up some test users as well. TO to Administer->User management->User, and click the "add user" (admin/user/user/create).
- 5) Enter username, email, password, status: active, roles: editor + Click Create a new account
- 6) Repeat the above setup for all the editors and the webmaster.
- 7) Also create a user called Random Customer, but note that this Random should not be assigned any sepecific role.

# Configuring permissions

- Let's assign who can do what on the site:

1) Administer->User Management->Permissions  
([asmin/user/permissions](#))

2) Administration Menu permissions

- \* Enable Administration Menu for both administrators and editors

- \* Display Drupal links specifies whether resources on [drupal.org](#) should be part of the menu. This is useful for the webmaster, but not for the rest of the users. (check for webmaster). Useful for troubleshooting issues.

#### 4) Block module permission:

- \*Administer blocks - editor & admin
- \*use PHP for block visibility - not assigned to role

#### 5) Comment module permissions:

- \* Access comment - all users
- \* Administer comments - only editor and admin
- \* Post comments - anonymous and authenticated
- \* Post comments without approval – only authenticated

#### 6) Filter module permissions (security implications):

- \* so we give access only to admin to be able to "administer filters".

7) Menu module (allows to customize the site's navigation menus)

- \* Editor & admin

- 8) Node module permission (for each content type): create, edit own, edit any, delete own, delete any).

- \* Access - all users

- \* Administer content types - admin

- \* Administer nodes - editor, admin

- \* Revert revisions - editor, admin

- \* View revisions - editor, admin

9) Path module permissions

- \* administer url aliases - editor, admin

- \* create url aliases - editor, admin

## 10) System module permissions:

- \* access admin pages - editor, admin
- \* access site reports, administer actions, fils, site config, select different theme – admin only

## 11) Taxonomy module permissions (counts as contentS)

- \* administer taxonomy - editor, admin

## 12) User module permissions (access user profiles, managing users, change usernames...)

- \* access user profiles - anonymous, authenticated
- \* administer permissions - admin
- \* administer users - editor, admin
- \* change own username - admin

## 13) Click to save the permissions

# Hands-On: Contact Form

- 1) Enable the Contact module (Administer->Site Building->Modules, admin/build/modules).
- 2) Setting up the contact form is done through Administer->Site building->Contact form (admin/build/contact).
- 3) Click "Add category" (admin/build/contact/add): category (website feedback) recipients (your e-mail), auto-reply (thanks for sending feedback. We will shortly respond).
- 4) Repeat the previous steps to enter another category "project feedback". You can set this category to go to a different e-mail address, if you want.
- 5) Add a link on the website navigation to access the contact form. Go to Administer->Site building->Menus->Navigation (admin/build/menu-customize/navigation).
- 6) Find the Contact (disabled) menu item in the list. Click "edit" link.
- 7) Enter the settings: Menu link title: contact (default), Description (get in touch with us), Enabled, Expanded (unchecked), Parent item <Primary links>, weight 10.
- 8) Configure permissions so that visitors may use it. Administer->User management->Permissions (admin/user/permissions) and enable the permissions listed for the Contact module (access site-wide contact form - anonymous, authenticated), administrator (editor, admin).
- 9) Visit the [www.example.com/contact](http://www.example.com/contact) to view your new contact form.

# Taxonomy

- Way of organising and classifying things.
- Creating a taxonomy on your website is to identify what kind of content you'll have, and how it will be described. Photographs, can be described by the subject matter, the location in which they have been taken, or even the predominant color of the picture (Vocabularies)
- Vocabularies contain specific terms to describe content.
- 3 types of vocabularies:
  - simple lists of terms,
  - organised hierarchies of terms, and
  - "free tagging" vocabularies that allow you to define new terms as you post new content. = Useful in different situations.
- Easy to RSS to only one term on the website.
- Each term has a URL: [www.example.com/taxonomy/term/1](http://www.example.com/taxonomy/term/1).  
(/term/3,4 /term/3+4 -either one or the other)

# Hands-on: Creating a Blog

- The Blog module features:
  - adds a new content type: blog
  - an overview page with blog posts: [www.example.com/blog](http://www.example.com/blog)
  - an overview page of all blog posts by user:  
[www.example.com/blog/1](http://www.example.com/blog/1) \*where 1 is the user's account ID\*
  - links at the bottom of each user's blog list of blog posts
  - a filtered RSS for each user's list of blog posts
  - a private "my blog" link in the navigation menu

If you are building a one-person blog, the Blog module is not necessary. You can create a custom content type: Blog post and leave this module turned off.

- Go to Content type -> add new content type
- Go to permissions -> to change the permissions (who can write blogs)
- Go to Site Configuration->Site information to change what will get on front page (remove the after /node info)
- Let's set up our site's taxonomy: Administer->Content Management->Taxonomy
- Create a vocabulary for classifying the type of news item that's being posted. Click Add vocabulary (admin/content/taxonomy/add/vocabulary), enter the settings:
  - vocabulary name: category
  - Description: blank;default
  - help text: blank;default
  - content types: blog posts
  - tags: unchecked (default)
  - multiple select: unchecked (default)
  - Required: checked
- Save the taxonomy

- Back to taxonomy admin page : add a few terms for the category "community" "website info" "art" "photos"
- Add vocabulary for "Tags", to add additional, ad hoc information, such as what specific products.
- Enter a vocabulary name: Tags, for content type: Blog entry; tags: checked, multiselect - unchecked, required - unchecked.
- Click Create content->Blog entry to see the blog with the taxonomy added. Go ahead and create a blog entry.
- Log out to see the comments settings and how it looks with the taxonomy