This is an image of your default “home” or “front” page
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<th>Page(s)</th>
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</tr>
</tbody>
</table>
Logging In

- Go to your site URL + /user
  (e.g., yoursitename.ucsf.edu/user)
- Enter your username and password
  - UCSF_admin
  - temp01
- Press ‘Log in’
- You will see the screen below:

Drupal Site Anatomy
Drupal Terms

For an overview of basic Drupal concepts as well as documentation:  http://drupal.org/node/19828

**Control Menu:** Top, black menu is used for account settings, configuration, and administration controls

**Content Type:** In Drupal, each item of content is called a *node*, and each *node* belongs to a single *content type*. The *content types* in the Starter Kit include: Article, Basic Page, Events, News, Publications, and Webform. (Structure » Content types)

**Blocks:** *Blocks* are the boxes visible in various areas of your Drupal site and are discrete chunks of information. Some *blocks* are generated by related *content types* (e.g., Events or News) but they also can be created via the administrative menu (Structure » Blocks). You can control whether each *block* is enabled, where it will be placed, and the visibility of *blocks* on each page.

**Fields:** A *field* is the smallest unit of information in Drupal (e.g., numbers, dates).

**Module:** A *module* is software (code) that extends Drupal features and/or functionality. Core *modules* are those included with the main download of Drupal, and functionality can be activated without installing additional software.

**Navigation Menu:** The *navigation menu* is your site’s main menu

**Node:** A *node* in Drupal is the generic term for a piece of content on your site. A *node* consists of several *fields*. Each *node* on your site has a *content type*. It also has *fields* such as Node ID, a Title, a creation date, an author (a user on the site), a Body (which may be ignored/omitted for some content types), and some other properties.

**Slider:** Rotation “carousel” of images with related news or header

**Taxonomy:** *Taxonomy* on your site is organizational keywords known in other systems as categories, tags, or metadata. It allows you to connect, relate, and classify your site’s content. In Drupal, these terms are gathered within "vocabularies."

**User, Permission, Role:** Every visitor to your site, whether they have an account and log in or visit the site anonymously, is considered a *user* to Drupal. Each *user* has a numeric user ID, and non-anonymous users also have a user name and an email address. *Users* on your site can be assigned permissions via *roles*—either “administrator” or “editor.” Editors can only edit the body of pages an administrator has already created.

**Views:** *Views* allow you to choose a list of *nodes* or other *entities* (Drupal 7) and present them as pages, blocks or RSS feeds. Think of *nodes* or *entities* as a grouping of content (*fields*) and *views* as a way of selecting and displaying these groups of content.

**Webform:** *Webforms* create surveys in Drupal. Examples: contests, personalized contact forms, or petitions. After a submission, users may be sent an email "receipt" as well as sending a notification to administrators. (Structure » Content type » Webform)
1 Creating Content

- Go to ‘Content’ on Control Menu
- Click ‘Add Content’
- See Figure 1. These are the content types available in which you enter your content
- Select appropriate ‘Content Type’
- Fill out forms
- Click ‘Submit’

Figure 1

Updating Content

- Navigate to the page you need to update
- Click the ‘Edit’ tab at the top of the page
- Edit the content you are modifying
- Click ‘Submit’

EXERCISE 1 (next page)
**EXERCISE 1: Create a page**

Now that you are familiar with content creation, this exercise will allow you to create pages for your site. Please experiment with the different options available.

1. Create a page for site entitled “Story.” From the Control Menu:
   
   *Content >> Add Content >> Basic Page*

2. Title this piece “Story”

3. Put the following text into the body:

   The University of California’s second president, opened the Berkeley campus in September 1873. Earlier that year, Toland Medical College in San Francisco had agreed to become the University's "Medical Department" it later evolved into UCSF.

4. Save the page and note the URL “yoursitename.ucsf.edu/story”

**Exercise summary**

By this point you should understand how the options you choose when creating a piece of content will affect how the content will be treated or displayed on your site.
2 Managing Menus

Rearranging menu
- Go to edit the Navigation Menu and select “list links” page
- Click list links for the Main menu

<table>
<thead>
<tr>
<th>TITLE</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main menu</td>
<td>list</td>
</tr>
<tr>
<td></td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td>add</td>
</tr>
<tr>
<td>The Main menu is used on many sites to show the major sections of the sites often in a top navigation.</td>
<td>links</td>
</tr>
<tr>
<td>Management</td>
<td>list</td>
</tr>
<tr>
<td>The Management menu contains links for administrative tasks.</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td>add</td>
</tr>
<tr>
<td>Navigation</td>
<td>list</td>
</tr>
<tr>
<td>The Navigation menu contains links intended for site visitors. Links are added to the Navigation menu automatically by some modules.</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td>add</td>
</tr>
<tr>
<td>User menu</td>
<td>list</td>
</tr>
<tr>
<td>The User menu contains links related to the user’s account, as well as the 'Log out' link.</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td>add</td>
</tr>
</tbody>
</table>

Re-order menu items
- Click on the multi-directional arrows to the left of Home
- Drag Home to the top of the list

<table>
<thead>
<tr>
<th>MENU LINK</th>
<th>ENABLED</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Us</td>
<td>✔</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>delete</td>
</tr>
<tr>
<td>Home</td>
<td>✔</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>delete</td>
</tr>
<tr>
<td>Page Three</td>
<td>✔</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>delete</td>
</tr>
<tr>
<td>Page Two</td>
<td>✔</td>
<td>edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>delete</td>
</tr>
</tbody>
</table>

- Rearrange any other menu items as you see fit
- Click the Save configuration button
Adding a new menu item

- Click “Add link” at top of page
- Enter the title that you want to give the link
- Enter the Path of the link
- Click the **Save** button

EXERCISE 2 (next page)
**EXERCISE 2: Add and alphabetize the Navigation Menu**

Now that you know how simple it is to move things around in Drupal, this exercise will allow you to add pages you create to your Navigation Menu and achieve mastery of the main legend for your site—the Navigation Menu.

**Add**
1. Select gear in right-hand corner of Navigation Menu
2. Click “List links”
3. Chose “+ Add link” in upper left
4. Complete the required fields
5. Save

**Alphabetize**
1. Go to edit your Navigation Menu via “List links”
2. Select multidirectional arrows to drag and drop items in alphabetical order

**Exercise summary**

The menu system is the backbone of your Drupal site. It is very important that everything you want your visitors to find be added to the menu. You now know how to add and re-order the information you create for your site.
3 Using WYSIWYG (What You See Is What You Get)

Your WYSIWYG will allow you to do a lot of the same functions that you would do in Word.

- Bold, Italics, Underline, Strike Through
- Right Align, Center, Left Align, Justify
- Bullets, Numbers
- Left Indent, Right Indent
- Insert/Edit Link, Unlink
- Insert Image
- Paragraph Styles
- Table Creator
  - Table Properties, Cell Properties, Insert Row Above, Insert Row Below, Delete Row, Insert Column Before, Insert Column After, Split Cells, Merge Cells

**Styleguide**

Your Styleguide provides step-by-step instructions for vertical tabs, accordion, tool tips, tables, headers, paragraph styles, links, unordered lists, ordered lists, block quotes, and images. **Note:** Select “edit” and “disable rich-text” to review or copy-and-paste HTML related to these features.

---

**EXERCISE 3** (next page)
EXERCISE 3: Use WYSIWYG and Styleguide

Now that you know how to add pages and tinker with various styling, you will create Vertical Tabs and an accordion list of the following information:

Who do I contact
If an email address cannot be found, contact Courtney.anderson@ucsf.edu

UCSF versus USF
The University of California, San Francisco (UCSF) is a public university and member of the University of California (UC) system comprising ten campuses throughout the state. The University of San Francisco is a Jesuit university on a hilltop in San Francisco near UCSF but distinct and un-related.

President versus Chancellor
UC President is Mark Yudof. UCSF Chancellor is Susan Desmond-Hellmann, MD, MPH.

1. Create a Basic Page and input the text above

2. Select portions of text to Hyperlink in order to generate Vertical Tabs or Accordion

   “Insert/Edit Link” >> Class

3. Generate two versions of text above—Vertical Tabs and Accordion

Exercise summary

By this point you should understand how the options you choose when stylizing a piece of content will affect how the content will be treated or displayed on your site. Specifically, how you can leverage Vertical Tabs to “chunk” paragraphs of data or make expandable lists of information via Accordions.
4 Adding Images

When creating content, add images to the body field of your content.

Click the **Image** button in your WYSIWYG toolbar.

Browse for your image.

Click the **Upload** button.

You will see your image preview below.

Click ‘**Insert File**’

Click ‘**Insert**’

You can then drag, align and resize.

Click ‘**Save**’

**Photo Captions**

On the home page, credit with the following:

“Images: © Jane Doe and Bobby Sue”

Typical sources include: 2013 University of California, Sue Merrell, and UC Regents.

All other pages, credit images via the “image description” as you upload the image.

**Resources:**

- **Frank Farm** [http://www.flickr.com/photos/frankfarm/tags/ucsf/](http://www.flickr.com/photos/frankfarm/tags/ucsf/)
  [http://pharmacy.ucsf.edu/flickr/groups/](http://pharmacy.ucsf.edu/flickr/groups/)
- **UCOP** [http://ucop.webdamdb.com/](http://ucop.webdamdb.com/)
- **UCSF** [http://www.ucsf.edu/news-media-services/images](http://www.ucsf.edu/news-media-services/images)

**EXERCISE 4** (next page)
EXERCISE 4 Add images to content

In the following exercise you will practice adding images to your content. As a first step, search for “UCSF seal” and save “Seal_K.jpg” to your desktop. Then follow the steps below:

1. Navigate to the “Story” page you created earlier

2. Insert the image of the UCSF seal
   - Anywhere in the body of the page, select the image icon
     - You will receive an “Insert/Edit Image” box prompt
   - Select the “Browse” graphic in upper right, after “Image URL”
   - Click the “Upload” button at the top left
   - “Choose File” and select from the images you saved to your desktop
   - Press the "Upload" button under the “Choose File” prompt to send the image to your site’s image folder
   - Now select “Insert File”
     - You will again receive the “Insert/Edit Image” box prompt
   - Complete forms noting your preferences for the image*
     - *Suggested height x width of 120 x 120 for practice
   - Select “Insert”

3. Practice entering your photo credit to the “Image Description,” aligning right and left, and resizing

4. Save your page

Exercise summary

Now you understand how the options you choose when uploading an image will affect the display on your site. You also may wish to edit the images in a program such as Photoshop, Paint, or Microsoft Office Picture Manager before you upload and insert on your page.
5 Controlling Blocks

There are three types of blocks in the Starter Kit: Callout Box, Blocks linked to Events/News, and Blocks you create. To edit any of these blocks, follow the instructions below:

- Hover over the right upper corner of the block
- Click on the ‘gear’
- Click ‘Configure Block’
- Edit your block
- Click ‘Save Block’

EXERCISE 5 (next page)
EXERCISE 5: Control blocks

In the following exercise you will practice adding, hiding, and moving blocks on your site:

Adding
1. From the Control Menu, select “Structure” >> Blocks
2. Select “Add Block”
3. Create a Block called “Awards” to display the following:
   
   Courtney Anderson
   John Kealy
   Suya Colorado-Caldwell

4. Set “Visibility Settings” to “Only the listed pages” and type <front> in space provided
5. Save

Hiding
1. From the Control Menu, select “Structure” >> Blocks
2. Select “Sidebar – Callout” from Sidebar Second segment by choosing “configure”
3. Under “Visibility Settings” type into the space provided <front>
4. Save. Your orange callout box will disappear from your home page

Moving
1. From the Control Menu, select “Structure” >> Blocks
2. Use the multidirectional arrows to select (will turn yellow when selected) and drag and drop the “View: News: News – Block” above the “View: Events: Upcoming Events – Block”
3. Save. Now the News block will appear above the Events block

Exercise summary

Now you understand how to add, hide, and move blocks on your site. Note: you also can set blocks to be invisible except to an administrator. Simply go to the Blocks main listing and for the “Region” setting make sure that – None – is selected.
6 Managing Slider

- Click ‘Edit’ on home page
- You can edit homepage text and
- Upload images that will show on the homepage in the Slider
- Click ‘Save’

EXERCISE 6 (next page)
EXERCISE 6: Manage Slider

In the following exercise you will practice adding images and adjusting the size of your slider:

Adding
1. Go to your home page and select “Edit”
2. In the “Slider Images” portion press the “Add another item” button
3. Follow instructions to upload an image (you may use the UCSF seal from exercise 4)
4. Give the new image a Title, note: this will appear in the text box overlay of the carousel
5. You also must provide a URL to the image
6. Save

Resizing
1. From your Control Menu, select “Configuration” >> Media >> Image Styles
2. Choose the “edit” link of the “flexslider_full”
3. Select the “Override defaults” button
   - This provides you with an “edit” link under “Operations”
4. Select “edit” and adjust the Height and Width to a size you prefer
5. Update effect

Exercise summary

Now you understand how to add images to your slider and adjust the display size of this carousel of images.
Site Admin 101

The initial install provides you with the “super administrator” account. Aside from the “server administrator” this is the next in command for access and management. There are two roles within the templates—“administrator” and “editor.” If you are the main, site administrator, you are responsible for managing potential restrictions on your team members’ access (People » Permissions). You can do this via the “super” administrative account where you will add each team member with unique login credentials and respective roles (see “+ Add user” below). The “Permissions” tab also allows unique access permissions/restrictions beyond “administrator” or “editor.”
Content Owners

When you create a piece of content the user account that you are signed in with is the owner of the content. You can see this in your ‘Authoring Information’ on the content.

To change the author, start typing the users name in this area. Note: the author must be a user.

Taxonomy

To manage your taxonomy on your site

Go to Structure -> Taxonomy

Your taxonomy lists are managed here—currently there is only a taxonomy list for Event Locations

To add an item to this list:
   Click ‘Add Term’
   Add name of term
   Click ‘Save’
URL Aliases

When you create content on your site, Drupal names your content by node ID that may result in a page that is URL of /node/29. Drupal uses a system called URL Alias to help you create a more readable URL.

Giving your content a “Good” URL

We have built in the configuration of your new site the ability to have Drupal produce automatic aliases based on the title you give your content. For example the title of your content is “This is my new content” your URL would be www.mysite.com/this-is-my-new-content.

If you want to change the URL of your content:
  - Navigate to your piece of content
  - Click ‘Edit’
  - Go to the ‘URL Path Settings’ area of the page
  - Uncheck the ‘Generate automatic URL alias’
  - Provide the URL you would like to give your page
APPENDIX A:

What are the steps for your new Drupal Web Starter Kit site?

- Create a ticket in ServiceNow, one ticket per URL
- Get trained*
- Finalize your site in "preview"
- Create a DNS request in Service Now for your live site**
- QA your live site

*First come, first served
With your ServiceNow ticket, you are added to the training list for the next month. If you would like to designate or add individuals for training, please notify them prior to submission. All those identified will receive information regarding training for that month once solidified. Questions: courtney.anderson@ucsf.edu, kristen.wiecek@ucsf.edu, or john.kealy@ucsf.edu

**NB: DNS requests take up to three days to complete
APPENDIX B: Planning for complex sites

If your site has more than a few pages, it may be helpful to outline the organization before you start. If you have a literal or visual depiction of the hierarchy and navigation of your site, you won't lose track while creating.

The following are two examples. In the first, the pages of the Ethics and Compliance site are listed in a spreadsheet and in the second, the pages of the Conflict of Interest site are diagrammed. Either of these methods may be helpful.

<table>
<thead>
<tr>
<th>Conflict of Interest Advisory Committee</th>
<th>Title</th>
<th>URL</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conflict of Interest in Research (Home)</td>
<td><a href="http://or.ucsf.edu/orx/coi.html">http://or.ucsf.edu/orx/coi.html</a></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Webinars for Revised PHS COI Regulations</td>
<td><a href="http://or.ucsf.edu/orx/coi/Webinars.html">http://or.ucsf.edu/orx/coi/Webinars.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>About Conflict of Interest Research</td>
<td><a href="http://or.ucsf.edu/orx/coi/about.html">http://or.ucsf.edu/orx/coi/about.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>California Law</td>
<td><a href="http://or.ucsf.edu/orx/coi/laws/calaw.html">http://or.ucsf.edu/orx/coi/laws/calaw.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>COIAC Process, Schedule &amp; Membership</td>
<td><a href="http://or.ucsf.edu/orx/coi/coiac.html">http://or.ucsf.edu/orx/coi/coiac.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Conflict of Interest Forms</td>
<td><a href="http://or.ucsf.edu/orx/coi/forms.html#5137-DSY_state">http://or.ucsf.edu/orx/coi/forms.html#5137-DSY_state</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Contact Information</td>
<td><a href="http://or.ucsf.edu/orx/coi/contact.html">http://or.ucsf.edu/orx/coi/contact.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>FAQ Regarding Conflict of Interest</td>
<td><a href="http://or.ucsf.edu/orx/coi/faq.html">http://or.ucsf.edu/orx/coi/faq.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Federal Regulations</td>
<td><a href="http://or.ucsf.edu/orx/coi/laws/fedregs.html">http://or.ucsf.edu/orx/coi/laws/fedregs.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Guideline Table</td>
<td><a href="http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/GuidelineTable.html">http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/GuidelineTable.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Laws and Regulations</td>
<td><a href="http://or.ucsf.edu/orx/coi/laws.html">http://or.ucsf.edu/orx/coi/laws.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Responsibilities and Procedures for Policy 100-34</td>
<td><a href="http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10034.html">http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10034.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Responsibilities and Procedures for Policy 100-33</td>
<td><a href="http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10033.html">http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10033.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Responsibilities and Procedures for Policy 100-35</td>
<td><a href="http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10035.html">http://or.ucsf.edu/orx/coi/ucpolicies/ucsf/rp-10035.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Revised PHS Rule for Conflict of Interest</td>
<td><a href="http://or.ucsf.edu/orx/coi/RevisedRule.html">http://or.ucsf.edu/orx/coi/RevisedRule.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Specific Situations</td>
<td><a href="http://or.ucsf.edu/orx/coi/specific.html">http://or.ucsf.edu/orx/coi/specific.html</a></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Agency-Specific Requirements</td>
<td><a href="http://or.ucsf.edu/orx/coi/specific/agenciespecific.html">http://or.ucsf.edu/orx/coi/specific/agenciespecific.html</a></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Clinical Studies</td>
<td><a href="http://or.ucsf.edu/orx/coi/specific/crinclstudies.html">http://or.ucsf.edu/orx/coi/specific/crinclstudies.html</a></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Consulting Agreements</td>
<td><a href="http://or.ucsf.edu/orx/coi/specific/consaltagree.html">http://or.ucsf.edu/orx/coi/specific/consaltagree.html</a></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>MTA</td>
<td><a href="http://or.ucsf.edu/orx/coi/specific/mta.html">http://or.ucsf.edu/orx/coi/specific/mta.html</a></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Research Gifts</td>
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<td><a href="http://or.ucsf.edu/orx/coi/ucpolicies/ucsf.html">http://or.ucsf.edu/orx/coi/ucpolicies/ucsf.html</a></td>
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APPENDIX C:  
Roles and responsibilities for site owners

Many people may be involved in the creation and upkeep of UCSF sites. Detailed descriptions are below, but basically content editors create and manage the written material, photos, etc that go into a site, and handle related functions like taxonomies. Site Administrators handle non-content aspects such as new views, user accounts, etc. IT staff provide hosting coordination, manage Drupal patches, help with migration and deployment, and troubleshooting.

Content Manager is someone who can add and edit web pages on a website.

Typical Content Management Tasks
- Authoring Content
- Select the right content type to create
- Upload images and files
- Using TinyMCE
- Content Management
- Find content, even if it is unpublished
- Publish and un-publish content
- Manage other type of content promotion, such as sidebar promotion
- Identify and change content owners
- Manage Site Menus
- Create menu links to content
- Reorder menu items
- Basic Taxonomy Management
- Assign taxonomy terms to content
- Create, edit and delete taxonomy terms
- Create, find, edit and delete URL aliases
- Create a custom block and place it in a region
- Moderate comments

A site administrator is a person with the technical skills to keep a Drupal website current, create user accounts, manage permissions, and add new functions to a Drupal site. They usually do most of their work via the Drupal interface and rarely use version control to accomplish their job.

Typical Site Administrator Tasks
- Create user account
- Change user permissions
- Keep unique modules up to date
- Enabling and configuring a module
- Create a new content type
- Create a new view
- Change blocks or panels layout
- Configure notifications or triggers