

Open Atrium, Features and how to use them

Daniel Gurtner, August 5th, 2009

To begin, you need to set up a group:

- Click on Content in the main menu, then on Add in the sub menu
- Click on Group in the list
- Fill out the form for your group:
 - o Title is what will be displayed at the top of every page of content belonging to the group
 - o Description will show up under the group's name when displaying a list of groups, or when viewing the group's home page
 - o Path Value is the internal URL path of the group, for example: <http://youratriumsite.com/group-pathvalue>
this would also be the URL for the group's home page
- Groups can be "archived", which basically deactivates the group. Users of a deactivated group are not able to create or edit content, but if their user permissions are set to let them individually do so, they can create/edit/delete content from other groups (and of course if they are members of other groups).

Next, add users to the new group:

- This can either be done by:
 - o Clicking on People in the main menu, then on Users in the sub menu
 - o Click on the user's name in the list, which takes you to the selected user's profile
 - o Click on Account settings and then on the Groups tab in the content menu
 - o Check the box next to which group you want to add the user to and click Save
- Another way to add a user to a group is when creating a new user:
 - o Click on People in the main menu, then on Users in the sub menu
 - o In the top right corner, select the ADD USER tab
 - o Fill out all the form for the new user account and check the box at the bottom next to the group the new user is to be added to, then click Save
- A user in the admin role (if the permissions are set to do so) can also add new members from within his/her group:
 - o Click on MY GROUPS at the top of the page from within the user profile.

- Next, click on Members and then either select Add new account for creating a new user and adding them to the group, or select Add members to add already existing users to the group

To add features, click on Settings and then on the Features tab. Select which feature you would like to add and click Save settings to enable them. This only needs to be done at the beginning, when the site is being set up.

- **events and calendars, how does it work?**
 - o **Atrium Calendar**

The calendar lets you share events and meetings with your team.

 - To add a calendar event, click on the calendar tab
 - Hover over the day (number in the top left corner) and click Add
 - Enter all the information for the event and save
 - The event now shows up on group members' calendars and, if the groups members have been selected under Notifications when adding the event, it shows up as a notification as well

 - To add a field that gives the option to add day-times of the even, I navigate to Content > Content types > iCal Event
 - Click on the Manage Fields tab then click on Configure in the Date row
 - Click Change basic information
 - Under Widget Type, select Text Field with Date Pop-up calendar
 - Under Input format, select a format that includes time, such as month/day/year - hours:minutes
- o The calendar can be configured to be accessed by anonymous users. This can be done by
 - Clicking on MY GROUPS at the top of the page from within a user's profile.
 - Next, select the group name that contains the calendar that is to be promoted to the front page
 - Select the Calendar tab, then underneath it, the iCal Feeds tab
 - From the list, select the feed to be promoted to the front page and then click on Edit
 - On the new page, at the bottom, click on PUBLISHING OPTIONS and then check the box next to Promote to front page

- It is possible to import an iCal feed from outside sources:
 - From within the group's home page, select the calendar icon from the tab menu

- From the sub menu, select iCal Feeds and then click on the +Add iCal Feed
- Fill out the form, adding the feed URL in the appropriate field and click on Save
- Events can also be added separately by clicking on the +Add Event button and filling out the form
- Feeds from other sources can be imported, but only iCal Feeds will appear in the calendar.
- The calendar doesn't seem to be made for public use :-(
And Open Atrium appears to have been designed to be accessible only by authenticated users.
But I have managed to put the Hall of Champions iCal feed into a calendar and make it accessible to the public/anonymous users. This could function as a centralized calendar for all the museums in the park. However, search ability is still very minimal and viewing options will most likely need to be tweaked separately in the respective php file(s) to make it look right.

- **case tracking system, how does it stack up to something like fogbugz**
 - o **Atrium Case Tracker**
The case tracker lets you assign tasks to yourself and others and track the progress on a project.
 - Before adding a case, a project must be added first
 - The Case Tracker can be accessed from a user's profile, by clicking on My Groups, then selecting which group the case is to be added to, then selecting the Case Tracker tab
 - It works pretty much the same as fogbugz, except that fogbugz has much better content filter capabilities. I'm sure this will be updated soon though.

- **forums + mail, what are the forums like, and it seems like they integrate with mail somehow. a list? notifications? can you respond via email and have it posted to the site?**
 - o **Atrium Blog**
The blog lets you post text on a topic that can be read by your group. Other group members have the option to comment.
 - o **Shoutbox**
The shoutbox allows group users to post informal message blasts on the dashboard of their group. Very similar to the Status Message on facebook or a Tweet on twitter.
 - Under Content, then clicking Add, and then clicking on Shoutbox, a new shoutbox can be added, which will be accessible to all users of the site.
 - o **Forums**
Are a lot like the blogs, but allow other users in the same group to interact in a way that gives them more freedom. It allows them to respond as if they were writing a new blog entry, answering a question or concern that a different user in their group addressed.
 - Forums must be added separately

- by clicking on Content in the left sidebar menu, and then clicking on Forums, then clicking on add forum
- To start a new topic, click on Content in the main menu, then Add in the sub-menu, and then Forum topic
- Emails get sent out automatically to people if they've been checked for notification when writing a post
 - It seems possible to set up emails to come in and be posted to the forum, but I haven't been able to make it work yet.
 - To begin, I think a mailbox must be set up first:
 - Click on Content then select Mailhandler
 - In the top right corner, click on ADD MAILBOX and set up email configurations

- Misc

- if you have an OpenID account, this can be added to your user profile
- <http://youratriumsite.com/admin> will display something like a super dashboard
- new groups can be added by clicking on add new content in the super-dashboard or by selecting Content from the main navigation, then selecting Add from the sub-navigation OR clicking + Add Group from inside your user profile, in the Groups tab
- Anonymous users seem to be able to access more content than permissions settings allow
- Under /admin/build/spaces (or by clicking on Structure, then Spaces presets), groups can be added that have more functionality than just the usual private/public options
- By navigating to a specific group, it is possible to make the group's dashboard available to view by the public.
 - Under Settings, click on Publishing options
 - Then check both boxes Promoted to front page and Sticky at top of group home page and other lists.

- Hit Save and the group's public content is promoted to the homepage.
 - The groups content to show publically can be configured by clicking on Features
 - Then from the dropdowns selecting Private, Public or Disabled
- to set the site's public front page, it is also possible to do so under Configuration and then clicking on Site information
- Then under DEFAULT FRONT PAGE enter the URL path (the page under which group you are logged in as, will already be set as the default of the URL path – the main default page can also be set under <http://youratriumsite.com/admin/settings/site-information>)
- The interface does not seem very user friendly... it's somewhat easy to create/add/edit or do stuff once you know how, but it's a little tricky having to try and find what you are looking for. I guess that's why this document exists.
- There are occasionally strange mysql warnings, but after updating some of the modules, a few of them stopped popping up. There must still be some bugs to be fixed...
 - For example, when trying to configure the appearance of the site, under `/admin/themes/settings`, changes don't get saved and the following warning gets displayed:
warning: preg_match() expects parameter 2 to be string, array given in `/filepath/bootstrap.inc` on line 771.
 - This seems to also be the most common warning message I get whenever I change any settings
 - Another message I see frequently when trying to edit paths is the following:
The highlighted fields below may need to retain their current values for your site to operate properly. Settings may be disabled or reverted automatically if they are not compatible with one or more of your site's modules.
Essentially, it blocks access to input fields where I could enter a different path for the main page, for example.

- Once a new content type has been created, such as an imported iCal Feed or a Forum, icons will appear in the sub menu to click on for editing purposes
- views module > access all views must be enabled for anonymous users to be able to access dashboard components of a public group, such as the calendar. Additionally, under the group's calendar settings, in iCal Feeds, select the feed that is to be published, click Edit and under PROCESSORS, enter a high number in the PROMOTED ITEMS field, such as 100 or so to promote all events of the current month and upcoming ones to the public view of the calendar. However, in the public view, the layout changes in a way that it does not fit in the browser and looks funky.

- **The menu (some menus are too large to be displayed fully, clicking on VIEW ALL will reveal a list of available menu items)**
 - Administration
 - Maintenance, such as Clear Cache
 - Clicking on administer in the breadcrumb menu give a view of all available menu items
 - Content
 - Add: to add new content items
 - Edit: to edit existing content items
 - Books: to add and edit books
 - Comments: lists all messages such as comments to blog entries comments to cases, or replies to forum topics and entries
 - Content types: list different types of content on the site and allows for configuring and editing them
 - Feeds: shows a list of imported feeds such as iCal feeds or RSS feeds
 - Forums: allows the administration of forums; adding containers and forums, also shows a list of forums currently on the site
 - Mailhandler: shows a list of mail boxes and allows for adding new ones and editing existing ones
 - Post settings: simple configuration options of how users can add postings
 - RSS publishing: simple configuration options for outgoing RSS feeds
 - Taxonomy: configuration options for classifying content (see <http://drupal.org/handbook/modules/taxonomy> for more info)
 - Structure
 - Blocks: administration of block of content
 - Context: allows for configuring context/sections representation of the site (see <http://drupal.org/project/context> for more info)
 - Features: allows site admins to enable or disable certain kinds of content such as blogs or calendars
 - ImageCache: simple configuration for preset options in the image cache and image resize options
 - Menus: administration of different kind of menus

- Modules: lists all modules used in the site and allows for enabling or disabling them
 - Spaces presets: allows for adding and editing presets of how content is viewed
 - Themes: allows for adding and changing themes for the site and configuring the administration theme
 - Triggers: options for actions to be executed when certain requirements are met such as running cron or directly publishing posts to the front page
 - Views: controls how lists and tables of content are presented (see <http://drupal.org/project/views> for more info)
- Configuration
 - Actions: must be configured together with Triggers in the Structure menu
 - Case Tracker: configuration of how cases can be set up and displayed within groups (see <http://drupal.org/project/casetracker> for more info)
 - Clean URLs: allows for enabling or disabling Clean URLs
 - Date Popup Configuration: simple configuration options of how the date-picker is presented for users adding events/calendar entries
 - Date and time: simple configuration of time zone and week day settings for the site
 - Error reporting: simple configuration for error handling
 - FeedAPI settings: configuration for aggregating feeds on the site; must be edited by the super-user
 - File system: configuration of file system path and temp-directory for uploading files
 - File uploads: configuration of file uploads, max upload size etc.; can only be edited by super-user
 - Image toolkit: allows for setting the default jpeg quality for image manipulations
 - ImageAPI: settings for which module handles image manipulations and jpeg quality; can only be edited by super-user
 - Input formats: configuration of FullHTML, FilteredHTML and Markdown presets for input formats such as allowed html tags; can only be edited by super-user
 - Logging and alerts: settings for database logging

- Mailhandler: settings for handing content types of incoming mail
 - Performance: configuration of caching options
 - Search settings: configuration of searching the site and indexing content
 - Seed settings: settings for the Development Seed customization module seed
 - Site information: configuration for information displayed about the site such as title and reply-to email address; some settings are not even configurable by super-user (why?)
 - Site maintenance: settings for putting the site in off-line mode
 - Persistent URL: settings for renaming URLs, similar to URL aliases module
- Organic groups
 - Organic groups configuration: configuration of group details and internal messaging etc.
 - Organic groups access configuration: visibility settings for group users
- Appearance
 - lists available themes and allows for enabling/disabling and setting default
- Features
 - Same as Features in the Settings menu; allows site admins to enable or disable certain kinds of content such as blogs or calendars
- Messaging & Notifications
 - Mail to web: settings for incoming mail
 - Manage subscriptions: subscription settings for site content
 - Message templates: settings for out-going emails
 - Messaging settings: further settings for out-going emails
 - Notifications Settings: settings for how outgoing mail is sent and what is shown in the email etc.

- Modules
 - Same as Modules in the Settings menu; lists all modules used in the site and allows for enabling or disabling them
- People
 - Access rules: settings for adding/editing access types
 - Permissions: configuration of user permissions of user roles
 - Roles: administration of user roles
 - U create settings: default roles that new users are assigned to
 - User settings: configuration of how user profiles can be edited, display of notification email for new users etc.; some parts can only be edited by super-user
 - Users: settings for users
- Reports
 - Recent log entries: shows a list of the most recent log entries
 - Top 'access denied' errors: shows a list of encountered 'access denied' errors
 - Top 'page not found' errors: shows a list of encountered 'page not found' errors
 - Top search phrases: shows a list of search terms that have been entered by users to find content
 - Available updates: shows a list of modules and updates, if any are available
 - Status report: shows a status report of components on the site that could be running correctly or not, available updates and links for trouble shooting
- Help
 - Shows a list of modules/links to specific help topics