

Using the ABC Web Site

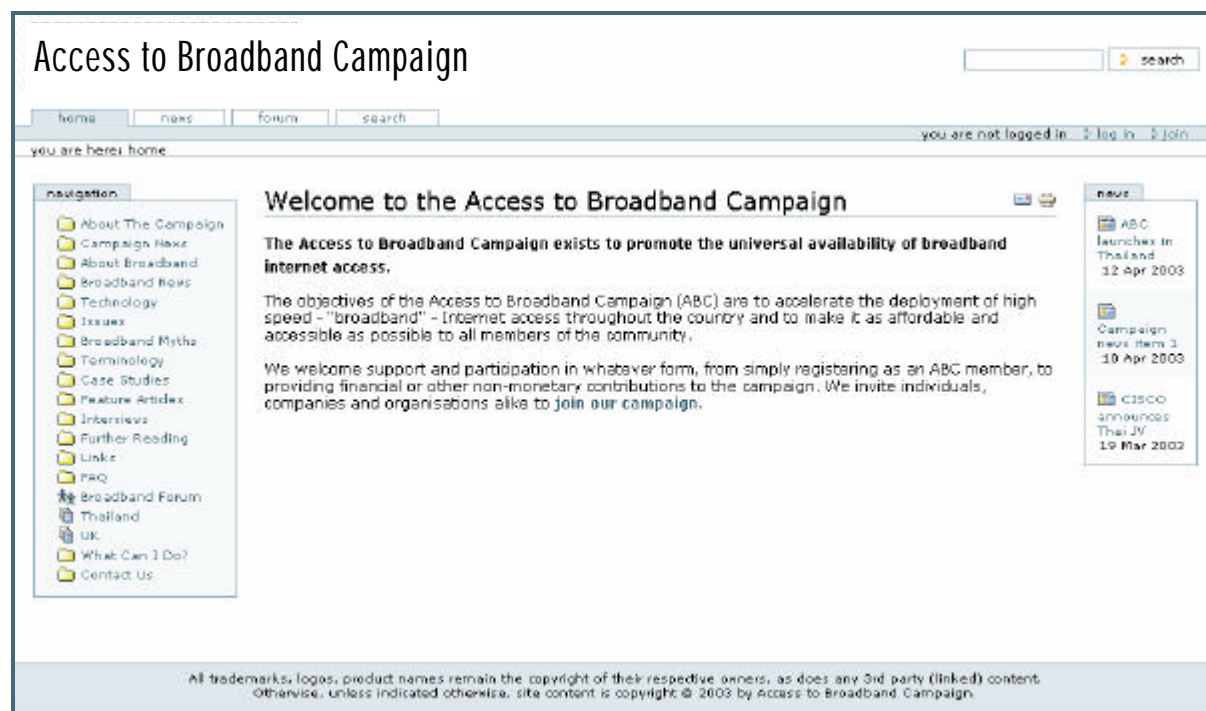
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Requirements to access & use the site

A recent browser, capable of handling CSS and Javascript. You also need to allow “cookies” to be accepted from the site. 1,024x768 screen size is recommended though the site should work well enough on lower resolutions. No other client software required. An internet connection is assumed!

Site layout



Here's the basic site layout. Features to note:

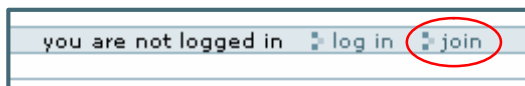
- Quick search box, top-right of the screen.
- “Tab” bar at top for quick access to specific site areas or functions e.g. (Advanced) Search, News area etc.
- **you are here** – this shows the “path” through the folders to the current document; you can click on these links to jump back. [This feature is commonly referred to as “breadcrumbs”].
- “Membership” menu top-right (login, join, and other options for logged in users)
- Site navigation box on the left – as you click on links, sub-menus (if any) will become visible and folder content can be viewed. The folder currently in view is shown in bold in the navigation box.
- Other “boxes” of content may also be shown, depending on your “authority level” and where you are in the site e.g. News box, Review box.

Before login/unregistered site visitors

Site visitors can see all published site content, but cannot do the following:

- Sign up to mailing lists
- Post messages to the discussion forum
- Submit content
- Search the member database
- View member pages/content

To sign up as a member



- Click **join** in the top right menu.

- Enter the requested details here.

- You can opt to have your user name/password emailed to you, as a reminder.

- Press **register** when done.

Please register

By registering with us, you will have your own account with the possibility to have personalized content, and you will be able to add your own documents, images and files to the site.

Personal Details

User Name ■

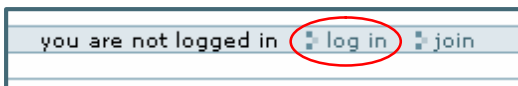
E-mail ■

Password ■

Confirm Password

Mail Password?
 Yes, mail me my password

Logging in



- Click **log in** link

- Fill in username/password here and click **log in**.
- **remember my name** stores a cookie on your computer so your login name will be "remembered" and completed for you next time you visit the site. If using a public or shared computer, don't tick this box.
- If you can't remember your password, click the link provided here and it will be mailed to you at the email address you provided when you registered. (If you cannot receive this mail, e.g. if the email address you gave us is no longer valid, contact the site administrator.)

Please log in

To access this part of the site, you need to log in with your username and password.

If you do not have an account here, head over to the [registration form](#) to become a member.

Account details

User Name

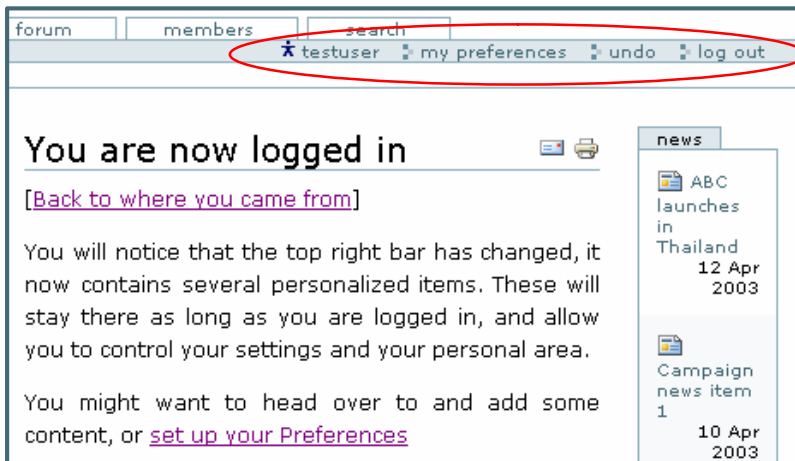
Password

Remember my name.

Forgotten your password? [Click here](#) to have it mailed to you.


Having trouble logging in? Make sure to enable cookies in your web browser. Don't forget to log out or exit your browser when you're done.

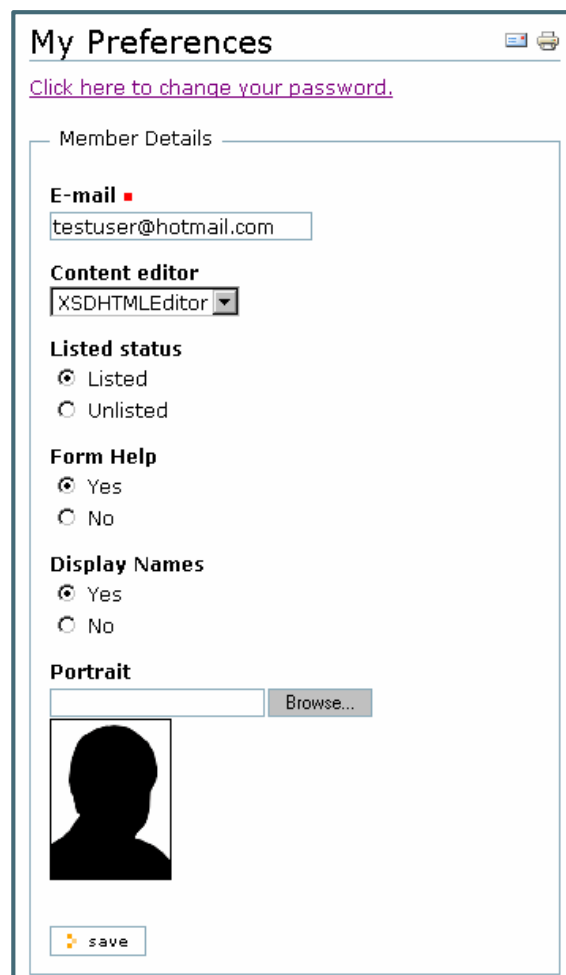
After logging in



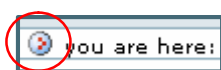
- After logging in, the top right menu changes.

My Preferences

- Update your email address here
- Choose “XSDHTMLEditor” as your **content editor** and you will see this icon  when editing content; clicking this lets you use an online WYSIWYG text editor to edit and format your document.
- **Listed status** indicates whether you can be seen in Member Search results (“Listed”) or not (“Unlisted”).
- **Form help** refers to the yellow popup boxes you see as you move around a form. You can turn these off here.
- **Display Names** indicates whether you want to see/edit the name of documents you create (this is the part that shows up in the URL) or whether you want to let the system generate the name for you. Generally leave this set to Yes; the system will then give you a default name which you can change if you wish.
- You can upload a picture of yourself here, if you want to put a face to your name – the picture should be 75 x 150 pixels in size



My Favorites



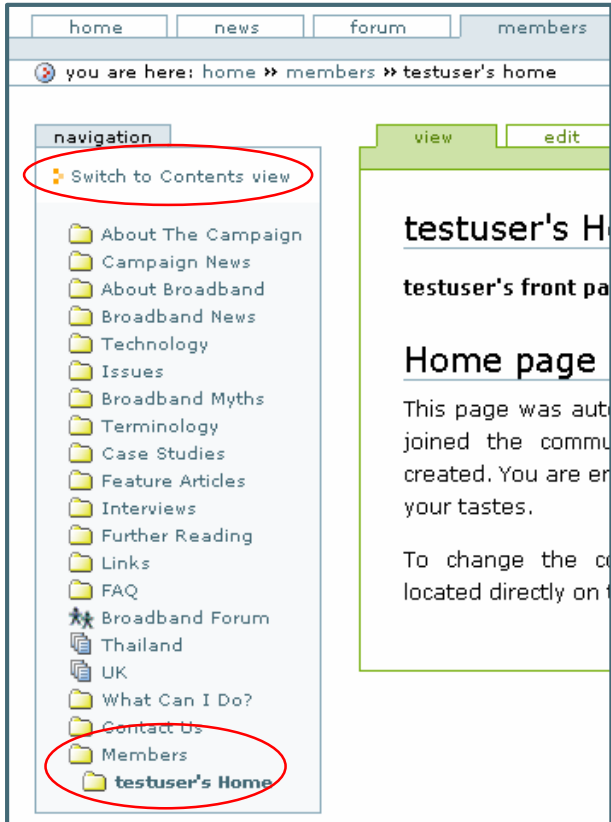
If you are logged in, you will see an additional button on the left of the breadcrumbs trail. This lets you add the current page to your list of Favorites. Your list is displayed in a “my favorites” box below the menu, this lets you navigate quickly to areas of the site you visit regularly.

The **Organise Favorites** link in the box lets you delete or edit these favorites.

Accessing your personal folder

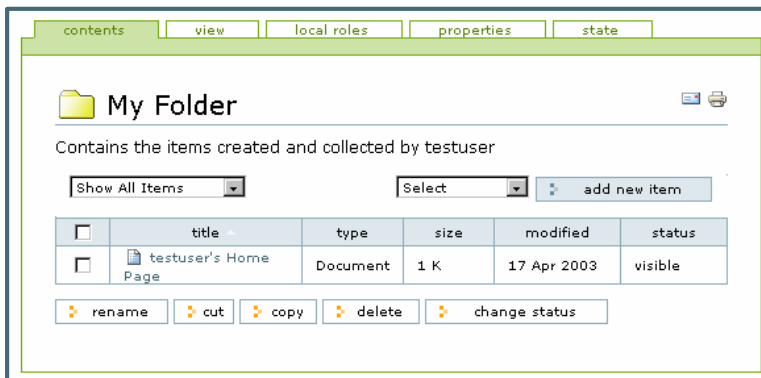


- To access your member folder (where you can also submit content items for publication on the site), click on your username in the top right menu.



- Now you can see your own folder in the menu, and a new link **Switch to Contents view** at the top.
- You'll also notice a set of tabs in green just above the document view. These let you modify and publish the document – they are described in more detail later.
- To add or work with content, click the **Switch to Contents view** link.

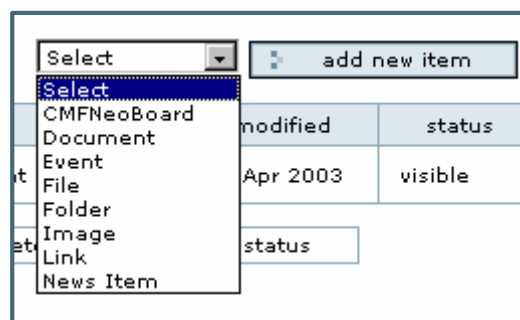
Working with content items



- This is like a file manager, and shows the contents in the current folder. You can "tick" items and then perform operations on the selected item(s) – Rename, Cut, Copy, Paste, Delete.
- You can also change the status of multiple items in one operation, instead of one by one (see below for more information on item status).

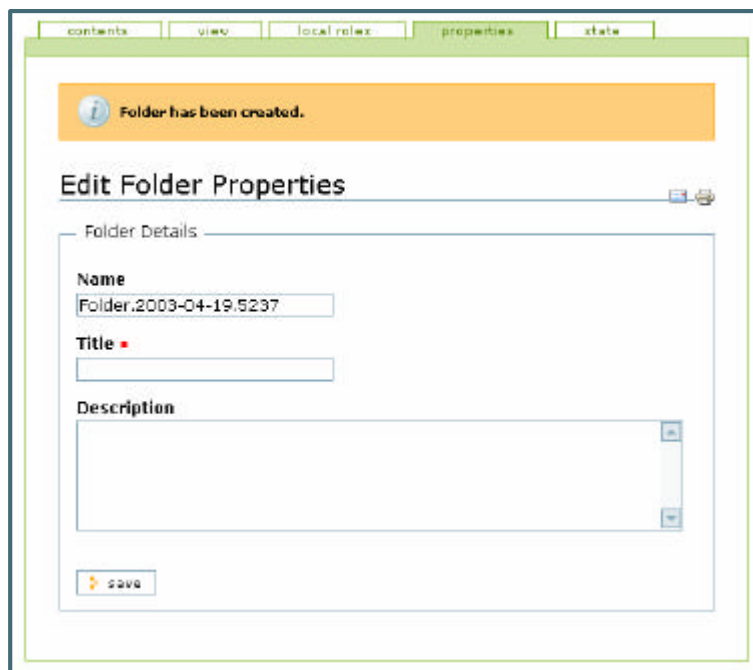
- Note that clicking on the table header will sort the list by that column. Clicking again sorts in the reverse direction.

- Above the file listing, the **Select** list lets you choose a "content type" to add - select the relevant item type (typically Folder, Document, News Item or Link) and then click the **add new item** button.



To add a link in the menu - Add a Folder

Navigation menu links represent the site Folders – so, if you want to add a menu item in/below the current folder, select “Folder” from the list of items, then click the **add new item** button. This will take you to the Folder **properties** tab:



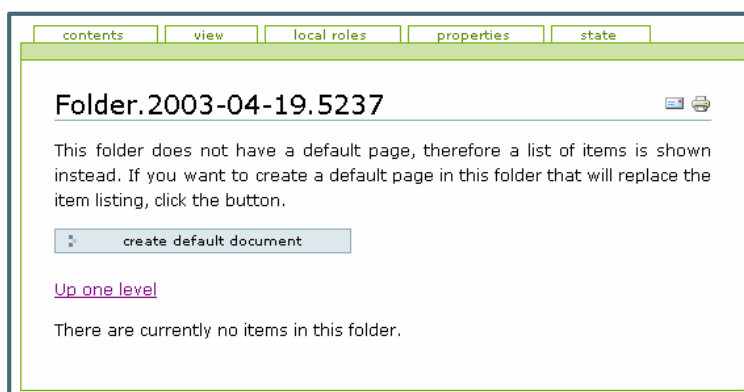
- **Name:** this is the folder name as represented in the URL, and is also used for sorting the folders - hence you can use arbitrary folder name e.g. a1, 10 etc
- **Title:** this is what appears in the navigation box and the page title. Keep this short to keep menu “narrow” (although titles will be truncated here if they are too long).
- **Description:** this will be shown as default text when the user clicks on the folder, if no other document has been created.
- Click **save** to keep changes.

If you do nothing else, then when you view this folder you will see a default view, which comprises the folder Title and Description, and a listing of the items in the folder. As you add content items to the folder, they will be listed here for viewing. As mentioned above, if you want some of these content items to appear in the navigation box entries, create a folder and put the content in the new folder. If you want to replace this default view, create a default page as described below.

Creating a default page for a folder

If you want a document to appear when a folder is selected in the navigation box, instead of the default listing view, then you need to create a document named “index_html”. The easiest way to do this is to click the **view** tab for the folder:

- As indicated here, click the **create default document** button to create a default page for the folder.
- If there are other items for viewing in the folder, these now will not be accessible, as this new page replaces the default list view. To show the other content, the simplest option is to create a folder or folders to contain the other items, then these will appear in the navigation box as “sub-menus” to the current folder, and each of these may itself have either a list view or a default page defined. [The alternative requires HTML format documents to link to or include your content items, see below.]



Other folder properties

We've looked at the folder Contents, View and Properties tabs. Briefly, here's what the other tabs are for:

The **local roles** tab lets you give other site members additional access rights to (some of) your content folders. Most users won't need to change these.

The **state** tab handles the publication process, which works in much the same way for folders as for content items (see below).

Creating content items

There are a number of different content "types" which can be added, including:


- Document
- File
- Link
- Event
- Image
- News Item

To add a new content item, the process is the same as for adding a new Folder – select the content type you want to add, and click **add new item**.

Edit tab

The Edit screen is where the information you want to publish is entered. Each content type will have a different set of properties that can be entered, enter the relevant details and click **save**. After saving, you will be taken to the View tab to see the results of your changes.

Document and News Item content types allow for formatted text (specifically, HTML) as well as plain text. This lets you embed graphics, web links etc. (You can also use "structured text" or STX format, but don't worry about this if you're not already familiar with it.) You can generally create HTML simply using either the online editor, or any word processor that can save in HTML format e.g. Microsoft Word. You can also upload the file instead of editing it online.

If you have configured an editor (see **My Preferences** above) then you will see this icon  which lets you compose the document in a more "user-friendly" editor.

Remember that the Name of the item will appear as part of the web address – you will need to use this name if you want to insert HTML links to it in Documents or News Items.

HTML links to other content

If you want to create "complex" documents with graphics, links to other pages, downloadable files etc, you need to create an HTML format document and include the appropriate "tags" to include content. The recommended process to follow is as follows:

Create content items in the same folder as the document in which they will be used:

- If you want graphics, create an Image item for each picture and upload the graphic file. By default, make the item Name the same as the uploaded file name, including the file extension (.gif, .jpg etc) - although you can in fact use any name you like.
- If you want to include a link to another page, create a Link item and put the full web address in this item.
- If you want a link to a downloadable file, add a File item.

Add links to your document:

If you put these items in the same folder as your Document or News Item, then the link to each is easy to define: you don't need to worry about the full (or "absolute") address, you can just refer to the item name only (i.e. a "relative" link). This has the advantage that if you want to relocate the content, you copy both the Document/News Item together with their included files to a new folder, and you won't need to update the links.

Example links:

- To include a picture called "mypicture.jpg", create an Image item named "mypicture.jpg", upload the file, then include an HTML link in your document in the relevant place:
``

- To include a link to download a PDF document called "mydocument.pdf", create a File item with the same name, upload the file, then include the link
`Link description`
- To include a link to another web site, create a Link item (e.g. named "othersite") with the full URL, then link as above:
`Link description`
- If you want the link to open in a new window, insert `target="_new"` in the hyperlink:
`Link description`

You don't actually have to create Link items for external links, you can just include the full address in your link, but there are some benefits from creating content items for links. However, if you're composing your pages offline and want to include links to 3rd party sites, you'll find it easier to just insert the full URL in the hyperlink, and skip the need to create Link items on the ABC site.

Any links in your document for which Link items are defined will also appear in the "Related" box when someone views the page. These Link items will also be available in Search results, Topics, Folder listings etc. If you compose a document offline using full URLs, you can also consider creating duplicate Link items for the more important/useful links in your document so that users will be more likely to see or find these links.

Styles and CSS

The site style – fonts, colours, shading, borders etc – is controlled using CSS (Cascading Style Sheets). This requires a separate CSS file, which is referenced when each page is displayed to be included in the site web pages.

If you want to compose HTML documents on your own PC and use the site styling (which thereby prevents hardcoded formatting overriding the "standard" style), you need to include the stylesheet in your HTML document. If you're online, you can insert the following stylesheet link somewhere in the `<head></head>` tags:

```
<link rel="stylesheet" type="text/css"
href="http://www.liquidzope.com/abc/portal_skins/plone_styles/plone.css">
```

If you want to work offline, just go to the link above in your browser and you should be able to view the stylesheet. Save it to your PC, and then link in the local stylesheet file to your document instead of the remote one. Then you can disconnect and edit your content offline using the same formatting as the site. (Note that you will need to update this local copy of the stylesheet if any changes are made to the version used on the web site, if you want to see the document the way it will appear online, or want to use any new styles that may have been defined.)

If you're using FrontPage, and the stylesheet is linked correctly, you should see all the available site styles listed in the Styles drop-down list on the FrontPage toolbar. If you limit yourself to using these styles and do not apply any "direct" formatting on your text, then your documents will always reflect the site styling, even if this is changed in future. If you want additional styles to be created, or existing styles modified, contact the site administrator(s).

HTML headers

When uploading or creating HTML for the body text of a Document or News Item, note that any HTML headers will be stripped, as the system looks only at what lies between the `<body></body>` tags. This has the advantage that if you have referred to a local copy of the stylesheet, this reference will be changed to point to the copy of the stylesheet on the web site.

Creating content offline

As mentioned above, you may want to create HTML or other pages offline and then upload them to the site. You can either use the **Upload contents** box on the **edit** tab to browse, select and upload a file from your PC, or you can just cut and paste the HTML from your editor (e.g. FrontPage) into the **Body text** box.

Properties tab

view
edit
properties
state

Edit Properties 📄 🖨

This information, also referred to as *metadata* is the collection of information that is used to categorize an object, assign effectuation dates and expiration dates, language, and keywords. Change this item's metadata using the form below. Remember, metadata is powerful - it enables us to do lots of useful categorization. So fill in the fields as concisely as possible, and leave the ones you don't know blank.

Item Properties

Allow Discussion

Default
 Enabled
 Disabled

Keywords

Existing keywords

Thailand

Effective Date

 📅

Expiration Date

 📅

Format

 ▼

Language

 ▼

Copyrights

Contributors

- **Allow Discussion:** if you want to allow an “in situ” discussion to take place about your content item, set this to “Enabled”
- **Keywords:** you can select from (and, if you have appropriate authority, add new) keywords that are used to categorise the site content. These can be used to filter content, create Topics, and generally influence how and where content is presented.
- **Effective Date** is the date from which the item is available for public view (this lets you add content but set it up for future “release”). By default, no date is defined and the item will become immediately available once it has been approved for publication. [This can also be defined on the **state** tab.]
- Likewise, **Expiration Date** (if defined) sets a date after which the item will not be available for public viewing. This is useful for date-dependent items such as Events. By default this is blank. [This can also be defined on the **state** tab.]
- Note the Calendar icon 📅 to let you select dates easily.
- **Language** will be used when adding multi-lingual content i.e. to indicate what language the item is in; this is then used to determine what items to show depending on the users’ language.
- There should be no need to change the **Format**.

State tab

The State tab controls the *content publication process*. The following information is from the "Plone Book" – see www.plone.org

Reviewing Content

One of Plone's most powerful features is the integration of a powerful, flexible workflow system. Workflow is the ability to control the changes in content to your site needs. An example is a press release: a person will write a press release for a company, then that release will be reviewed by many people before it is made live. This is important for fixing typos and errors and for ensuring that the release is correct. Exerting this sort of control on a document is called workflow.

Plone comes pre-loaded with a workflow system called Plone Workflow. Modifying this workflow is detailed in Chapter 6, here we show how this workflow affects documents and the process called publishing.

Publishing is the process of making a document or object published. When an object is published it is visible on the site to all users so they can view the document. For example, when a News Item becomes published it becomes visible under the **News** tab and in the News box (see Chapter 5).

Publishing a document

As the document author you can alter and edit the document as many times as you like. When a document is created and each time it is edited, the document stays in "Visible" state. The visible state means that the document is accessible if you know the URL or have rights to view that folder. However they do not show up in search results or the navigation box.

Once you have finished editing the document, select the **State** tab. You will be presented with a form for publishing the document. There are a few options detailed below. If you want to submit the document for being published, select the **Submit** radio button and then click **save**.

The screenshot shows a web interface for managing document states. At the top, there are tabs for 'view', 'edit', 'properties', and 'state', with 'state' selected. The main heading is 'Publishing process'. Below this, there is explanatory text about item status and effective dates. The form contains several input fields: a 'Status' dropdown menu showing 'Status' and 'This item is currently in the visible state'; 'Publishing Details' section with 'Effective Date' and 'Expiration Date' fields; a 'Comments' text area; and a 'Change State' section with two radio buttons: 'Make private' and 'Submit'. At the bottom left of the form is a 'save' button.

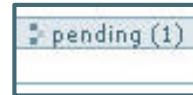
- **Status** - tells you the current state
- **Effective Date and Expiration Date** - you can give an object an effective and expiration date. Searches & navigation only shows documents if the current date is between these 2 dates. *[These dates also appear on the properties tab.]*
- **Comments** - here you can enter any comments or reason for the change in state you are requesting. These comments will be preserved in the change log for the object.
- **Change State** - the states you are allowed to change to, for publishing this is "submit".

When you click **save**, the document will be submitted for review.

Any previous changes to the document state will be displayed at the bottom of this screen.

Reviewing documents

If you have reviewing privileges, when you log in to your Plone web site, you will be presented with an indication if any items are awaiting review. This is shown in the bar across the top as shown here.



Select this link to get a list of the documents ready for review. As a reviewer you can then select each document and review them. Click on the publishing tab and you will be presented with a form like the one above. At this point you have basically two choices to either approve a document and publish it (the "publish" option) or reject it (the "reject" option). If you reject the document then you will probably want to provide a comment to the user explaining why you have rejected it.

[You may also see a "review" box below the navigation box, which lists any items awaiting review.]

Editing a document after it has been published

You cannot edit a document after it has been published, you must retract it. This will move it back into a visible state, to do this click on the publishing tab for the document and click **retract**. Then you can edit the document as much as you wish. After you have done so you must then submit for review to be published again. This ensures that the review process is maintained for documents that have been edited.