Portal User Guide

A Guide to Portal Usage

Version 2.1.2

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Table of Contents

Goal

User mastery of the USAID Resource Management Portal.

Objectives

The objectives of this guide are for you to:

- Configure your computer to use the portal.

- Find the portal on the Internet.

- Search for content on the portal.

- Navigate the portal, using tabs and the navigate menu.

- Search the portal for Content

- Find portal members

- View portal content, as well as email, print, and bookmark content, and toggle full screen mode.

- Get portal help.

- Login to the portal and understand terms of use.

- Set portal preferences.

- Understand portal Roles.

- Understand what content is.

- Understand that content has a Title and a Description.

- Understand that content has different states.

- Add different kinds of content.

- Manipulate existing content.

- Manage content in your my folder workspace.

- Manage group content.

- Add content to a public area of the portal.

Configure Computer to Use The Portal

The portal is best viewed at 1024x768 pixel screen resolution or better. For best results, you should change your monitor to this screen resolution. To do so:

Windows Users

1. Locate your computer's desktop and right click. The **Display Properties** dialog will appear.

2. Click the **Settings** tab.

3. Locate the **Screen Area** slider. Drag the slider so that it is set to **1024x768 pixels**.

4. Click **OK**. Your monitor resolution will change to 1024x768 pixels, suitable for using the portal.

5. Note that in rare cases you will not be allowed to change your screen resolution due to your organizations computer policy. In this case you will need to contact your systems administrator and request that you be allowed to change your screen resolution. If you are not allowed to change your screen resolution, your portal experience will be less than optimal, though you will be able to navigate the portal.

Mac Users

1. Currently USAID does not support the Macintosh environment. However the portal is known to work well in Apple Macintosh OSX, using the **Safari 2+** or **Mozilla/Firefox 1+** - web browsers.

2. Set your Macintosh monitor resolution to 1024x768 Pixels, or better.

Question: The portal still does not look right. What can I do?

You may be using an older web browser that does not support Cascading Style Sheet (CSS) technology. Try upgrading to a newer browser (Internet Explorer 5+, Safari 2+, Mozilla/Firefox 1+) and see if that solves the problem. If it still does not, email the portal administrator at info@rmportal.net for assistance.

Find the Portal on the Internet

The portal URL is http://www.rmportal.net/. Type this URL address into your browser to get to the portal.

Search the Portal for Content

1. To search for content within the portal, click in the **Search** field, located in the top left portal column.

2. Type the word that you want to search for, and click the **search** button. A list of content items that contain the word you are searching for will be listed.

3. Click on one of the items in the list to go to that content item.

4. Alternately, click on the **Suggested Keywords** link, located under the search box, and you will be presented with a list of keywords prepared by portal editorial staff, that can be used to help formulate your search. Click on a keyword, and a list of content items that contain the word you are searching for will be listed. Click on one of the items in the list to go to that content item.

Navigate the Portal

There are three ways to quickly navigate the portal structure. These are the **Tabs**, left **Navigation** menu, and **Portlets**.

Tabs

1. Click the home tab. This is the portal **home page**, where go when you first access the portal. The home page provides a quick overview of the portal.

2. Click the **news tab**. This page contains **published news items** collected from around the portal. Click on the title of a news item to read details. *Note that the portal news tabs does not list private Group news items.*

3. Click the **calendar tab**. This page contains **published calendar events** collected from around the portal. Click on a date's listed **event** to see event details. *Note that the portal calendar does not list private Group calendar events.*

4. Click the **groups tab**. This folder holds **published and private portal groups**, which are shared public or private workspaces for a group of portal users, organized around a theme.

5. Click the **library** tab. This publicly shared folder holds resource management related web **pages**, **files**, **links** to relevant websites, **flashmoves**, and **images**, organized into folders by topic. Click on subfolders to descend into the library structure.

The library is organized and maintained by portal librarians, with reviewed content contributed by portal users.

6. Click the **training** tab. This publicly shared folder holds training resources and opportunities related to resource management, organized in folders by theme.

7. Click the **links** tab. This publicly shared folder holds links to content and to other websites that support USAID and partner missions.

8. Click the **help** tab. This publicly shared folder holds technical help on using the portal. **HOWTO tutorials** give step-by-step descriptions of how to do common portal tasks. Technical policy documents help you to answer often complex questions on topics *like portal governance, copyright and fair use, and website publishing guidelines and rules.*

Navigation Menu

You can also move through the portal by clicking on the left **Navigation** menu. Folders will open to show subfolders and content. This can be useful to navigate deeply nested folder structures like the portal **library** and **groups**.

Portlets

Portlets are the graphical boxes that appear in the left and right columns of the portal. Portlets show different kinds of portal-related information that may be helpful during your visit to the portal.

The Portlets that are displayed vary depending on:

- Your **role**: **anonymous**, **member**, **reviewer,** or **manager**, and;
- Your **context**: your location in the portal structure.

In other words, depending on your role and context, certain portlets may or may not appear as you move through the portal.

Search Portlet

The **Search Portlet** allows you to search the portal for content that matches your search criteria. Portal content is indexed so that if the text that you are searching for exists within the portal, that content should be listed as the results of your search. There are several exceptions to this, like **flashmovies**.

1. To search for content within the portal, click in the **Search** field, located in the top left portal column.

2. Type the word that you want to search for, and click the **search** button. A list of content items that contain the word you are searching for will be listed.

3. Click on one of the items in the list to go to that content item.

4. Alternately, click on the **Suggested Keywords** link, located under the search box, and you will be presented with a list of keywords prepared by portal editorial staff, that can be used to help formulate your search. Click on a keyword, and a list of content items that contain the word you are searching for will be listed. Click on one of the items in the list to go to that content item.

Navigation Portlet

You can also move through the portal by clicking on the left **Navigation** menu. Folders will open to show included subfolders and content. This menu can be useful to navigate deeply nested folder structures like the portal **library** and **groups**.

Login Portlet

The **Login Portlet**, located in the left column of the portal, allows users to quickly login to the portal.

1. To use the **Login Portlet**, type your **username** and **password**, and click the **login button**. If you have an account and type your username and password correctly, you will be logged into the portal.

2. You can also retrieve a lost password by clicking the **"Forgot your password?"** link.

Calendar Portlet

The **Calendar Portlet**, located in the portal left column, shows **published** events that are listed on the portals main **calendar tab**.

1. To view calendar **events**, roll your mouse over any dates that are highlighted on the **Calendar Portlet**. A **summary** of the event(s) will pop out of the calendar.

2. To see event details, click the **date** of the **event**. You will see a screen with a list of events for that day. Click the **event** you are interested in, to see its **details**.

3. You can move forward and backward by month on the calendar by clicking the little **right and left triangles**. This will page the calendar forward and backward by month.

News Portlet

The **News Portlet**, located in the portal **left column**, lists the five most recent **news items** listed on the **portal news tab**.

1. To view a **news item**, click in the portlet on the **news item link** you are interested in viewing. You will be taken to that **news item**.

2. Click at the bottom of the portlet on the **More news…** link, to list upcoming events for the month.

Events Portlet

The **Events Portlet**, located in the portal **left column**, lists the five most recent **events** listed on the portal calendar.

1. To view an **event**, click in the portlet on the **event link** you are interested in viewing. You will be taken directly to the details of that event.

2. Click at the bottom of the portlet on the **Upcoming events…** link, to list upcoming events for the month.

Help Portlet

The Help Portlet, located at the top of the portal right column, provides:

- A direct email link to the portal administrator (info@rmportal.net) for email help.

- A link to the portal help folder that includes technical help documentation for the portal.

- Links to common software browser plugins that are used to view proprietary content on the portal.

Review List Portlet

The **Review List Portlet** is only visible by members of the portal with the **role** of **Reviewer** or **Manager**. This portlet lists documents that have been submitted for review, and are ready to be **published** or **rejected** as public portal content. The following procedure applies only to portal members with such an editorial role.

1. To review content, click on its link.

2. View the content and make an editorial decision to publish or the content.

3. Publish or reject by *changing* the **state dropdown menu** to **publish** or **reject**. For more information on setting **state**, see [Content has a State](#).

4. If the content is **rejected**, it is suggested that you email the content's author with the reason for rejection, and what can be done to rectify acceptance for publication.

Click at the bottom of the portlet on the **Full review list…** link, to list all recent submissions for review to the portal.

Recent Changes Portlet

The **Recent Changes Portlet** lists the five most recent content additions to the portal. Click on one of the listings to view. If the content is in the **state** of **public draft** or **published** you will be able to view it. If the content is a **private state** it will not be viewable, except by the content's **owner** and **managers**.

Click at the bottom of the portlet on the **All recent changes…** link, to list all recent content additions to the portal.

Find Portal Members

You can use the **members tab** to search for portal members.

*Note: Only members who have published their personal **my folder** will be listed.*

Steps to locate a portal member:

1. Click the **members tab**.

2. You can search by **Name**: type the full or partial name of the member you wish to find.

3. You can search by email address.

4. You can search by **Last logged in** time**:** the dropdown menu selection includes: **Yesterday**, **Last week**, **Last month**, **Ever**

5. Click the **search** button. Members who meet your search criteria will be listed.

6. Click on a members *name or picture* to visit that member's information, in their **My folder** work area.

A logged in member has additional search options available:

1. You can search for members within a **group** by selecting a group from the **Groups** dropdown menu.

2. You can search by member **roles**: **Member**, **Reviewer**, **Manager**, or **Owner**.

Note: Clicking the **search** button without entering ANY information will result in *all* published portal members being listed.

Content Actions

*Content, in the context of the portal, are web **pages**, **links** to web resources, **files**, **flash movies**, **news items**, and **calendar events**.*

At the most basic level, content can be viewed.

View Content

1. To view content, navigate using **tabs**, the **Navigation menu**, or the **search** field, to **folders** where content are located.

2. Generally, folder content is presented as a list, each with a content item having a **Title** and **Description**.

3. Click on the content **Title** to view the content item.

Display View

The portal allows you to choose the format in which to display a folder.

1. Click on the arrow next to the word **Display.**

2. A drop down menu containing display options will open:

- **Standard view:** displays a list of all content items in the folder with **Title**, **Description**, **Creator**, and **Date** details.

- **Summary view:** displays **Title** and **Description** of the content.

- **Tabular view:** displays content items in a tabular form.

- **Thumbnail view:** displays images located in a folder, in thumbnail form.

- **Default view:** helps you choose one particular piece of content (a **page**) as the default view for a folder.

3. The portal saves the chosen display view for a specific folder until you change the view.

4. *Note that these options may not always be available, according to where you are in the portal, and the permissions you have.*

Icon Actions

For many areas of the portal, you can **print** content, **email** content, **add content to favorites**, and **toggle** the portal to **full screen mode**.

Locate the **document action icons**, which are located at the top right of the page content area.

These icons are:

- – Email the content to your friends and associates.

- – Print the content area of a page.

- – Add a link to the content in you my folder / favorites folder.

- – Toggle the content area to full screen mode.

Email Content

1. To **emai**l a **page**, locate the **email icon** ✉, at the top right of the page content area.

2. Click the **email icon**. You are taken to the **Send this page to somebody** screen.

3. In the **Send to** field, enter the email address of the person you wish to send the content to.

4. In the **From** field, your email address should be pre-entered. Check that it is correct. If it is not correct you should update your account **preferences**. See the section on setting preferences for information on how to do this.

5. In the **Comment** field, enter any text that describes what you are sending. This will be the body of the email message.

6. Click the **send** button. The email will be sent to the address that you specified.

Print Content

1. To print a page, click the **document actions printer icon** 🖨, located at the top right of the page content area.

2. The content area of the page will be printed. The surrounding banner, left and right columns, and footer will not be printed.

Add to Favorites

Favorites are links to content on the portal that you create to mark content that you return to regularly.

1. To save content as a **favorite**, navigate to the content that you want to save. Click the **heart icon** ♥ located at the top right of the page content area.

2. The page will be added as a favorites link in your **my folder > favorites** folder.

3. *To return* to a **favorite** later, click the **my favorites** link in the orange **global actions** bar, located near the top of the page. Click on a listed **favorite** to return to that page.

Toggle Portal Full screen View

You can expand the content area (Body text in the middle of each page) to full screen view.

1. Click on the **toggle icon** located at the top right of the page content area.

2. The content area takes over the full width of the screen. This will help you to view portal content in a wider screen.

View the site and Content in an Alternate Language

Content may be wholly or partially available in languages other than English.

1. To change language from the English default, locate the **flags icons** *below* the **document action** icons.

If content is available in other than the default language, a flag will appear that represents that translation. Click the **flag** icon to view in the alternate language.

2. If a flag is grayed out, the content of the document is not available in the alternate language.

3. Note that often the shell of the portal (banner, menus, tabs, etc.) will have been translated but actual content will not have been.

3. Requests for translations can be sent to the portal administrator at info@rmportal.net. Translations are prioritized by portal librarian staff, and dependent on budget and staff available for translation into a particular language.

Get Portal Help

Instructions for getting help are available in the yellow box, located at the top of the right column. This **help portlet** is available on the home, and many other pages.

Email Help

If you have a technical or policy question, you can email the portal administration staff for help at info@rmportal.org. The portal staff will answer promptly and to the best of their ability.

Technical Help

1. Many technical documents relating to procedures for using the portal are located in the **help folder**.

Click the **help tab**. Of particular interest are:

- Technical procedural help located in the **How To Document Folder.**
- Plugins required for viewing proprietary content located in the **Plugin Folder**.
- **US Federal policies on web standards**.
- **Natural Resource Management Glossary and Keywords**.
- Other helpful resources.

What browsers are supported?

1. The portal requires a browser that supports Cascading Style Sheet (CSS) technology. Newer web browsers support this. Older web browsers do not.

2. **Microsoft Internet Explorer 5+, Mozilla / Firefox 1**+, **Safari 2+** *are supported*.

3. **Macintosh Internet Explorer** and early versions of **Safari** *are not supported*.

Where do I get a specific plugin to view some proprietary content?

1. Users may upload files to the portal that require vendor-specific web-browser plugin software for viewing and interaction.

Examples are:

- [Adobe Acrobat](#)
- [Adobe Flash](#)
- Video and audio content (MP3, MPEG, QuickTime, Real, etc.)

2. If you are trying to view content that uses one of these formats, and cannot see the content, you may need to download and install the appropriate plugin.

3. Instructions for download and installation are in the yellow box in the top right column of the portal.

4. *Note that in some cases, organizational computer policy will prevent you from downloading and installing third-party plugin software. If this is the case, you must convince your organization to allow the installation of the plugin, or you will be able to view the plugin specific content.*

Login to the Portal

How to I request portal membership and an account?

Send a request for portal membership to info@rmportal.net. The USAID portal management will consider your membership request, and you will be notified by email if you are granted membership to the portal, and will be provided an account username and password.

How do I know if I am not already a member?

Ask by sending your question to info@rmportal.net. If you are already a member (many accounts have been set up by USAID) we can send you your username and password.

Conditions of Membership

Upon login you will be asked to agree to conditions of membership in the portal.

The Conditions of Membership document explains the **Why, Where and How** to use the portal that each invited member needs to understand and agree to **prior to accepting Membership**.

It details the global objectives/intentions of the portal project (*why it was created*), the best ways to use the Portal (*Where you can go to work, post etc.*) and a conceptual introduction to the Portal tools (*How To use the Portal, as an individual, group, organization etc.*)

To review, open, read, and discuss:

- What the Portal has to offer
- What Membership Implies

Terms of Use and Netiquette

Upon login you will be asked to read and agree to certain **Terms of Use and Netiquette** for using the portal. These are the legalities and online behaviors you agree to when logging in as a member of the Portal.

To review, open, read, and discuss:

- Terms of Use and Netiquette

Privacy Policy

Upon login you will be asked to read and agree to **US Federal Privacy Policy**. In summary, this policy states:

1. That US Federal Internet privacy policy applies to this website.

2. That USAID is tracking some basic web usage statistics:

- The name of the domain from which you access the Internet
- The date and time you access our site,
- The Internet address of the web site from which you linked directly to our site,
- What information you view while you visit our web site.

3. That session cookies are required to maintain your login state from page to page.

4. That USAID Monitors unauthorized usage and defacement attempts, and may prosecute perpetrators under US Federal law.

5. That information on this portal is subject to copyright restrictions.

6. That USAID does not endorse linked or user provided content in any way.

7. That USAID is not liable for the accuracy of user-provided content.

8. Instructions on how to contact USAID.

We want to be very clear: We will not obtain personally-identifying information about you when you visit our site, unless you choose to provide such information to us. We maintain the information we collect in accordance with the [Privacy Act of 1974](#), where applicable.

Login Procedure

1. To login to the portal, you will need to know both your **username** and **password**. See below if you have lost them.

2. Locate the **login box** in the **left column**. You can also click the login link on the orange **global preferences** bar near the top of the page.

3. It is suggested that you review the **Conditions of Membership**, the **Privacy** policy and **Terms of Use and Netiquette**. These links are available in the footer at the bottom of the page.

Comment: This is not so, for the Conditions of Membership.

4. Type your **username**, **password**, and click the **login** button.

5. If you typed the right information, you will be logged into the portal, and receive a screen message that states that you have successfully logged in, and again reminds you to read the Terms and Conditions and Privacy policy document. This screen also directs you to either your **my folder**, to **set your preferences**, or to the **portal home page**.

Comment: Do we want to add reference to Conditions of Membership here? Will require retranslation.

6. If you are not successful at logging in, in all likelihood you may have:

- Incorrectly typed your username.
- Incorrectly typed your password.

Hint: Remember that passwords are CASE SENSITIVE.

Hint: check if your Caps Lock key is on. If so, press it to turn it off. You may be typing IN ALL CAPITOL LETTERS.

Lost Password

1. If you have lost your password, simply locate the login box in the left column. Click the link labeled **Forgot your password**?

2. Enter your **username** in the **My user name is** field. Your password will automatically be emailed to you. If you do not receive an email with your password, this means that the email address that you provided, or that we were provided with when your account was setup, is incorrect. *In this case, email the portal administrator at info@rmportal.net and we will personally see to it that you get your password.*

3. If your email address is wrong, please update it, per above instructions in your **User Preferences**.

Lost Username

1. Another reason that you may not be able to login to the portal is that you forgot, or never knew, your username. *The only way to retrieve a **username** is to email the portal administrator at info@rmportal.net.* Please include your *full name* and *current email address* in this email. We will email you a username or password.

Set Preferences

Preferences are personal information that you may or may not wish to provide, for the benefit of other portal users, and settings that control how the portal behaves for you.

1. To set your user preferences first **Login** to the portal.

2. In the orange **global preferences** bar just beneath the tabs are several links. Click the **Preferences** link. The **Title** of the page will change to **My Preferences**.

Change your Password

1. Note that if you change your password, and forget your username, your password will not be able to be retrieved, and will need to be reset by the portal administrator. For the purposes of this exercise, it would be best if you chose not to change your password at this moment, as if you do so incorrectly, you may not be able to continue with this procedure immediately.

2. Under **Member Preferences** click the **Change Password** link.

3. *Note that passwords are case sensitive and literal.* If you change your password to "MyPassword" that is exactly what you MUST type, including the uppercase letters. The most common cause of a password not working is that your Caps Lock key is on by mistake.

Passwords:

- Should be a single word, with no spaces.

- Should be at least 8 characters long.

- Can use special text characters like 0-9 and ! @ # $ % ^ & *.

Good practice is to use a nonsense or random word for your password. Your name is a very insecure password, as is any single word that can be found in a dictionary. Such passwords can easily be guessed, and your security on the portal compromised.

4. In the **Current password** field enter your *current password*. You must type your current password *exactly*.

5. In the **New password** field enter your new password. Password must have a minimum of five characters.

6. In the **Confirm password** field re-enter the new password. Make sure the confirmed password is identical to the new password.

7. Click the **Change password** button. Your new password is activated. Your old password is no longer active.

8. Click the **home tab** to exit Preferences

Change your Personal Preferences

1. Click the **Personal Preferences** link in the orange **global preferences** bar.

2. Your **Full Name** is listed first. If it is incorrect, you may correct it here. *This is required information.*

3. Your **Email Address** is listed. It is important that your email address be correct. If it is not, correct it here. *This is required information.*

4. Your **Location** is where you are located. This is optional information

5. Your **Biography** is a short overview of who you are and what you do. This information will be displayed on the your author page, linked from the items you create. This is optional information.

6. **Your Home Page** is the URL to your home page, if you have one. It should be in standard URL format, http://www.rmportal.net for example. This is optional information.

7. You may select a **Content Editor** for editing page content. It is suggested that you choose **Kupu** from the dropdown menu, unless you know HTML. Kupu allows you to edit content in a text editor similar to Wordpad or a simplified Microsoft Word.

8. We suggest you leave **Enable External Editing** unchecked. Contact the portal administrator for more information on external editors that you can use.

9. If **Listed in searches** is checked, your name will be listed when someone searches for it. If this item is unchecked, you will not be listed in searches. Choose your preference by checking or un-checking this box.

10. **Portrait** is an optional picture of yourself (or an image that you feel represents you) that you can upload. Portrait images should be 75 pixels wide by 100 pixels tall, and should be in .jpg or .gif image file format. You can use a digital camera or scanner to capture your portrait, and resize it using photo-editing software like Photoshop.

11. Click the **Save** button at the bottom of the page to save your preferences. *If you do not click Save, your preferences will not be saved.*

12. Click the **home tab** to exit **Preferences**.

What are Role(s)?

Roles are the permissions that allow certain types of actions on the portal by you, a portal user.

Different portal users may have different portal **roles**. For example:

- **Anonymous user:** An **anonymous** user is someone who is either *a visitor* to the portal, that is, not a portal member, or is a portal member who has *not yet logged in*. An anonymous user can *view and access* content residing in public areas of the portal, or that has been **published** (made publicly available), but *cannot **add, edit, move, rename, or delete*** content.

- **Member**: Someone who has an account login **username** and **password** and has logged into the portal. A member can add content and publish content to their **my folder** and they can add and post content for review to their assigned **group or public folders** (the **library**, **training**, **links**, and **help** folders)

- **Reviewer:** A reviewer has more permissions than a member but less than a manager. Reviewers can edit, review, and/or *publish* designated content created by a member; they cannot change the member's personal or group folder configuration or alter a member's user account.

- **Manager: There are two classes manager: a folder** manager (ex. the library or individual group manager) and a **portal** manager. Folder managers can view, add, edit, or delete content in folders where they are allowed to do so. A portal manager has complete power over the portal.

Every user *can be* assigned to one or more roles *(for example: a member and a reviewer)*. Roles for a user may differ in different parts of the portal. *If you have questions about roles or want to request a specific role at a certain location(s) inside the portal, contact the Portal Administrator* info@rmportal.net

*Note: All members, reviewers, and managers can **share** what they own, where they own it. See the section on Sharing for more information.*

What is Content?

Content are web pages, documents, digital media and links that can be posted, edited, stored, and deleted on the portal, and indexed for easy search. Content can be Private, Published, or in an intermediate state called Public Draft.

Content Types

Several types of content can be added to the portal are:

- **Page** - web pages made up of text and images, stored on the portal.

- **Link** - URL links to external web sites and pages and internal portal content.

- **File** - file content like Microsoft Word, Excel, Access and PowerPoint files, Adobe Acrobat files, and audio and video files.

- **Image** - digital images that are in a web friendly file format like .jpg, .gif, or .png.

- **Flashmovie** - Adobe Flash animations, presentations, and video.

- **Event** - happenings to be listed on a portal public or private group calendar.

- **News Item** - text news items of interest to the portal community or to a private group of users.

Copyright and Fair Use applies to content.

Before posting content, be clear who owns the copyright, and what terms and conditions might apply to reproducing that content on the portal. Fair usage of copyrighted materials does not necessarily mean you are free to repost that material to the portal, though you may be allowed to repost limited excerpts.

If in doubt:

- Ask the owner of the copyrighted material for permission to reproduce (copy).

- If permission cannot be obtained, it is generally acceptable to link to that copyrighted content, unless the owner specifically prohibits linking or places other restrictions on access.

- Review these portal guidelines on copyright and fair use.

Pirating (illegally copying) copyrighted material without permission opens the portal (and USAID) to legal action by the owner, so please take the above advice seriously!

Content has a Title and a Description

Content that you **add** to the portal **must** have a **Title** and a **Description**.

1. *A **Title** is used to identify your **content** to portal visitors, and in searches*.

Some rules of thumb for a **title** are:

- Short but descriptive.
- Uses proper grammar.
- Does not use abbreviations
- Uses characters of the alphabet, numbers, and certain special characters (, . : .)
- Does not use the characters ! @ # $ % ^ & * ( ) = < > ? / \ | + "" '' in the title. These characters can have special meanings and cause problems with searching for them.

Examples of good **titles** are:

- Wood Quality Implications of Forest Management
- UA BARA Meeting Minutes, March 12, 2006
- HOWTO: Copyright and Fair Use

2. *A **description** is a one-paragraph text abstract that accurately and concisely describes content though inclusion of key words*.

Accurate keywords in the description ensure that the document will be found during a search.

Rules of thumb for a **description** are:

- An abstract that quickly describes the content to a casual viewer.
- Uses keywords that concisely describe the contents of the content.
- Uses standard references like the document source, authors(s), date of publication, publishers, copyright information, and web reference, etc.
- Use a single paragraph. Line and paragraph breaks are not supported in a description.

A good example **description** is:

> *"Wood Quality Implications of Forest Management" is an extension publication from Oregon State University, which looks at the basics of conifer tree growth, characteristics that define wood quality, and the effects of silvicultural management practices on wood quality. Of relevance to agroforestry practices that aim to grow valuable timber are the various ways that managers can influence wood quality, e.g. planting density, thinning, pruning, and fertilization. The publication is relevant not only to western conifers, but also to softwood species in other regions as well. Original source of article obtained from {http://eesc.oregonstate.edu/agcomwebfile/edmat/pnw576.pdf} Also available from OSU Extension & Station Publications, Oregon State University, 422 Kerr Administration, Corvallis, OR 97331, "Tree Growth, Forest Management and Their Implications for Wood Quality" (PNW 576).*

Content Has A State

Content, by default is created in a **private** state. Only the person who created it (**owner**), the users and groups that the owner chooses to share with, and portal managers can see it.

To change the state of content:

1. To submit content for review, locate the **state dropdown menu**, and select **make visible**. This sets the content **state** to **public draft**. *Note that users who are not logged into the portal cannot see public draft content. Users who are logged in to the portal can see public draft content.*

2. To **publish** content, i.e. to make publicly available for viewing, locate the **state dropdown menu,** and select **publish**.

*Note that you WILL have permission to publish content in you're my folder, that you MAY have permission to publish content in a group that you are associated with, and that most likely you WILL NOT HAVE permission to publish content in the **shared library, training, links, and help folders** of the portal.*

3. *Note that content cannot be edited in the **published state**, except by portal managers. You must **retract** the content's state to public draft or private to edit the contents.*

To retract content, **navigate** to the content, located the **state dropdown menu**, and set the document **state** to **public draft** or **private**. If you have permission to edit the content, that is, you are the owner, an edit tab will become available, allowing you to modify the content.

For information on editing content see the section on [Content Actions: The Edit Tab](#).

Adding Content

Web **content,** in the context of the portal, includes items that you can **view**, **add**, **edit, move**, **rename** and **delete**, on the portal, like:

- [Folders](#) are used to store and organize content, like pages, links, files, flash movies, events, news items, and other folders.

- [Web pages](#) are made up of text, graphics, and links, and can be in HTML or plain text format.

- [Web links](#) are a URL reference to another web resource (page, file, link, etc), either external to the portal, or within the portal.

- [Files](#) are proprietary binary files, like a Microsoft Word document, a Microsoft Excel spreadsheet, a Microsoft PowerPoint slideshow, a Microsoft Access Database, or an Adobe Acrobat document.

- [Images](#) are digital pictures, in .gif, .jpg, or .png file formats.

- [Adobe Flash Movies](#) (formerly Macromedia Flash) are files developed in Flash, is a program for development and efficiently delivery over the web of presentations, animations, multimedia interfaces, and video. Certain other programs, like **Adobe Captivate**, may content into Flash file format.

- [News Items](#) are announcements that, upon publication, are listed on the **news tab** and in the **news portlet**.

- [Calendar Events](#) are happenings that upon publication are listed on the main **calendar tab** and in the **calendar portlet**.

All content includes a title, a description, the content itself, and comments that can be enabled or disabled.

Other actions can be performed on content. For more information see:

- [Content Actions: The Contents Tab](#)
- [Content Actions: The Edit Tab](#)
- [Content Actions: The Properties Tab](#)
- [Content Actions: The Sharing Tab](#)

Add a Folder

*Folders are used to store and organize content, like **pages**, **links**, **files**, **flash movies**, **events**, **news items**, and **folders**.*

1. To add a **folder**, navigate to where you want to add the **folder**. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the **add item dropdown menu** and select **folder**. The **Edit Folder** screen appears.

3. Click in the **Title** field and give the **folder** a short title. *The **Title** is used to identify your **folder** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **folder** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Save** button. Your **folder** will be saved. *If you do not click **Save**, your **folder** will not be created and saved for future use.*

6. Your **folder** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

      a. Change the **state** of your **folder** to **public draft**, and:

      b. Either **submit** your **folder** *for review and publication by portal editorial staff*, or;

      c. If you have permission to do so, **publish** your **folder** yourself.

      d. For more information on setting **state**, see Content has a State.

7. You may now, or later, want to edit your folder, revise it's properties, delete it, or share it with other users and groups.

Add a Page

A web page is made up of text, graphics, and links, and can be in HTML or plain text format.

1. To add **page** content, navigate to the **folder** where you want to add the page. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the add item dropdown menu and select **page**. The **Edit Page** screen appears.

3. Click in the **Title** field and give the page a short title.   *The **Title** is used to identify your **page** to portal visitors, and in searches*. *This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **page** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Body Text** field and type the body of your page. **Body Text** is the text content of your page. Body text can include formatted text, pictures and links to other web page content. *This is required.*

Assuming that you have selected **Kupu** as your default page editor (see the section in Setting Preferences on setting Kupu as your default text editor) simply type the content that you wish to appear on the page.

Otherwise, we suggest that you set the **text format dropdown menu** to **Plain Text**.

6. For the purposes of this tutorial, you can ignore **Related items**.

7. Decide if you want other logged-in portal users to be allowed to **comment** on your **page**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

8. Click the **Save** button. Your **page** will be permanently saved. *If you do not click **Save**, your **page** will not be created and saved for future use.*

10. Your **page** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

a. Change the **state** of your **page** to **public draft**, and:

b. Either **submit** your **page** *for review and publication by portal editorial staff*, or;

c. If you have permission to do so, **publish** your **page** yourself.

d. For more information on setting **state**, see Content has a State.

11. You may now, or later, want to edit your page, revise it's properties, delete it, or share it with other users and groups.

Add a Link

A link is a URL reference to another web resource (page, file, link, etc), either external to the portal, or within the portal.

1. To add **link** content, navigate to the **folder** where you want to add the **link**. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the add item dropdown menu and select **link**. The **Edit Link** screen appears.

3. Click in the **Title** field and give the **link** a short title. *The **Title** is used to identify your **link** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **link** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Link** field and type the internal or external URL link to a web page.

External (absolute) links are URL links to a web page outside the portal.

- An example is: http://www.usaid.gov

Internal (relative) links are URL links to content within the portal. Relative links never use http://, instead they only use the relative path to the document.

- For example: /help/help-how-to-documents/howto-copyright-and-fair-use is a relative link to a document found in the **help** folder of the portal

6. For the purposes of this tutorial, you can ignore **related items**.

7. Decide if you want other logged-in portal users to be allowed to **comment** on your **link**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

8. Click the **Save** button. Your **link** will be saved. *If you do not click **Save**, your **link** will not be created and saved for future use.*

9. Your **link** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

    a. Change the **state** of your **link** to **public draft**, and:

    b. Either **submit** your **link** *for review and publication by portal editorial staff*, or;

    c. If you have permission to do so, **publish** your **link** yourself.

    d. For more information on setting **state**, see Content has a State.

10. You may now, or later, want to **edit** your link, revise it's **properties**, **delete** it, or **share** it with other users and groups.

Add a File

A file is a digital binary object, like a Microsoft Word document, a Microsoft Excel spreadsheet, a Microsoft PowerPoint slideshow, or an Adobe Acrobat document.

1. To add **file** content, navigate to the **folder** where you want to add the **file**. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the **add item dropdown menu** and select **file**. The **Edit File** screen appears.

3. Click in the **Title** field and give the **file** a short title. *The **Title** is used to identify your **file** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **file** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Browse** button, and browse on your computer to locate a file you would like to upload. Click and highlight the file that you want to upload, and click **open.**

A **file** can be a:

- Microsoft Word Document (.doc)
- Microsoft Excel Spreadsheet (.xls)
- Microsoft PowerPoint Presentation (.ppt)
- Microsoft Access Database (.mdb)
- Adobe Acrobat Document (.pdf)
- Other binary files (various file extensions)

6. For the purposes of this tutorial, you can ignore **related items**.

7. Decide if you want other logged-in portal users to be allowed to **comment** on your **file**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

8. Click the **Save** button. Your **file** will be uploaded to the portal and saved. *If you do not click **save**, your **file** will not be created and saved for future use.*

Note that large files may take a long time to upload. Be patient. When your file has successfully uploaded you will see a message: **Changes saved.**

9. Your **file** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

   a. Change the **state** of your **file** to **public draft**, and:

   b. Either **submit** your **file** *for review and publication by portal editorial staff*, or;

   c. If you have permission to do so, **publish** your **file** yourself.

   d. For more information on setting **state**, see Content has a State.

10. You may now, or later, want to **edit** your file, revise it's **properties**, **delete** it, or **share** it with other users and groups.

Add an Image

An image is a digital image, in .gif, .jpg, or .png file formats.

1. To add **image** content, navigate to the **folder** where you want to add the **image**. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the **add item dropdown menu** and select **image**. The **Edit Image** screen appears.

3. Click in the **Title** field and give the **image** a short title. *The **Title** is used to identify your **image** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **image** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Browse** button, and browse on your computer to locate an image you would like to upload. Click and highlight the image that you want to upload and click **open.**

The portal supports the .gif, .jpg, and .png image formats supported by most web browser software. The path to the image on your computer will automatically load into the image field.

6. For the purposes of this tutorial, you can ignore **Related items**.

7. Decide if you want other logged-in portal users to be allowed to **comment** on your **image**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

8. Click the **Save** button. Your **image** will be uploaded to the portal and saved. *If you do not click **Save**, your link will not be created and saved for future use.*

Note that large files may take a long time to upload. Be patient. When your file has successfully uploaded you will see a message: **Changes saved.**

9. Your **image** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

   a. Change the **state** of your **image** to **public draft**, and:

   b. Either **submit** your **image** *for review and publication by portal editorial staff*, or;

   c. If you have permission to do so, **publish** your **image** yourself.

   d. For more information on setting **state**, see Content has a State.

10. You may now, or later, want to edit your image, revise it's properties, delete it, or share it with other users and groups.

Add a Flashmovie

*A **flashmovie** is an Adobe Flash (formerly Macromedia Flash) file. Flash is a program for development and efficiently delivery over the web of presentations, animations, multimedia interfaces, and video. Certain other programs, like **Adobe Captivate**, may export files into Flash format.*

1. To add **flashmovie** content, navigate to the **folder** where you want to add the Flash file. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the **add item dropdown menu** and select **flashmovie**. The **Edit Flashmovie** screen appears.

3. Click in the **Title** field and give the **flashmovie** a short title. *The **Title** is used to identify your **flashmovie** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **flashmovie** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Locate the **Upload swf file** field, click the **Browse** button, and browse your computer to locate a flash movie file that you would like upload. Flash movies have the file extension **.swf**. Click and highlight the .swf file that you with to upload and click **open.** The path to the Flash movie file on your computer will automatically load into the image field.

6. All other settings can be safely left at their default. The portal will figure out this information automatically.

7. Click the **Change** button. Your **flashmovie** will be uploaded to the portal and saved. *If you do not click **Change**, your **flashmovie** will not be created and saved for future use.*

Note that large Flash files may take a long time to upload. Be patient. When your file has successfully uploaded you will see a message: **Flashmovie changed.**

8. Your **flashmovie** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

    a. Change the **state** of your **flashmovie** to **public draft**, and:

    b. Either **submit** your **flashmovie** *for review and publication by portal editorial staff*, or;

    c. If you have permission to do so, **publish** your **flashmovie** yourself.

    d. For more information on setting **state**, see Content has a State.

9. You may now, or later, want to edit your flashmovie, revise it's properties, delete it, or share it with other users and groups.

Add a News Item

Add a public News Item

*A **news item** is an announcement that will show up in the **news tab** listing and in the **news portlet**.*

1. To add a **news item**, navigate to the **folder** where you want to add it. This could be your **my folder** or a **folder** in a **group** that you are associated with.

2. Click the **add item dropdown menu** and select **news item**. The **Edit News Item** screen appears.

3. Click in the **Title** field and give the **news item** a short title. *The **Title** is used to identify your **page** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **news item** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Click the **Body Text** field and type the body of your **news item**. *Body Text is the text content of your **news item**. Body text can include formatted text, pictures and links to other web page content.*

Assuming that you have selected **Kupu** as your default page editor ([see the section in Setting Preferences on setting Kupu as your default text editor](#)) simply type the content that you wish to appear on the page.

Otherwise, we suggest that you set the **text format dropdown menu** to **Plain Text**.

6. If you would like an image associated with your **news item**, locate the image **browse** button, click it, and navigate on your own computer to a .gif, .jpg, or .png format digital image that you would like to upload. Click open. The image will be uploaded.

7. If you have uploaded an image associated with your news item type an **Image Caption** in the corresponding field.

8. For the purposes of this tutorial, you can ignore **Related Items**.

9. Decide if you want other logged-in portal users to be allowed to **comment** on your **news item**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

10. Click the **Save** button. Your **news item** will be permanently saved. *If you do not click **Save**, your **news item** will not be created and saved for future use.*

11. *Important! A news item must be published to appear on the **portal news tab** and in the **news portlet**.*

12 Your **news item** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

     a. Change the **state** of your **news item** to **public draft**, and:

     b. Either **submit** your **news item** *for review and publication by portal editorial staff*, or;

     c. If you have permission to do so, **publish** your **news item** yourself.

     d. For more information on setting **state**, see [Content has a State](#).

13. You may now, or later, want to [edit](#) your **page**, revise it's [properties](#), [delete](#) it, or [share](#) it with other users and groups.

Add a Private Group News Folder

Description: HOWTO add a private group news folder that does not send news items to the main portal news tab, but keeps them private to your group.

To add a **private group news folder**:

1. Click on the **groups** tab, find and click to enter your **Group's** folder

2. Click the **contents** tab of your group folder.

3. From the **add item** dropdown menu select **smart folder**. A Plone smart folder will be added to your group folder.

4. Add a **title** (required) like **<groupname's> News**.

5. Add a **Description**.

6. Select which fields to display in the **Table Columns** pick lists:

   - Notice that by default, **Title** is added.

   - From the pick-list, click to select **Creator**, then click >> to add to the list of columns to be displayed.

   - From the pick-list, click to select **Creation Date**, then click >> to add to the list of columns to be displayed.

   - From the pick-list, click to select **Modification Date**, then click >> to add to the list of columns to be displayed.

   - From the pick-list, click to select **Description**, then click >> to add to the list of columns to be displayed.

   - Click the **save** button located towards the bottom of the page.

7. From the page content tabs, click the **criteria** tab.

8. In **Field Name** select **item type** and click the **add** button.

9. From the **Criterion Details** column pick list, scroll and select a value **news item** and click **save**.

10. Scroll down to **Add New Search Criteria**, select **State** from the dropdown menu, then set the **Criteria Type** dropdown select menu to **text**.

11. Click **add**.

12. In **Simple String Criterion: Value**, type: **private**   (exactly as typed here)

13. Click **save**.

14. From the **Add New Search Criteria, Field Name** dropdown select **Location**.

15. Click **add**.

16. Click the **browse** button (located down the page a bit). A window pops up.

17. In the new popup window, click on the Breadcrumb item link titled **Groups** (this will be part of a breadcrumb path and highlighted in blue).

18. Click the blue **insert** link, located in the right table column, for the Group that you want to add news to. The window will close and the Group workspace you selected will be listed. If the window does not close, you can close it manually.

19. Place a check by **Search Sub-Folders**, so that all subfolders of your group will be searched for news items.

20. Click **save**.

21. Now any **news item** content that is posted in or below the folder you selected for your **Location** will list, when you view the smart folder. The smart folder serves as a private news aggregator from around your group. News is not actually placed in the smart folder itself.

22. Important: your **news item** must be set to a **state** of **private**. Published news will go to the **main portal news tab**.

23. For assistance, email the Portal Administrator at info@rmportal.net.

Add a News Item to a Private Group Folder

1. Navigate to your **group**.

2. Determine if your **group** has a **private news folder**. If not, refer to the Add A Group News Folder.

3. If your **group** has a **private news folder**, *any private news items located within the **group folder** will aggregate on the **group's private news folder**, so long as the news item **state** is set to **private**.*

One suggestion is to create a folder named **News** in your **group folder**, and place all private news items in it.

4. To add a **news item**, refer to Add a News Item.

5. *Important! Your **news item** is created in a **private state**. Leave it this way. If you **publish** it, it will be sent to the main portal **news tab** and **news portlet**.*

6. For more information on setting **state**, see Content has a State.

Add a Published Calendar Event

*Published calendar **events** are happenings that are listed on the main **calendar tab** and in the **calendar portlet**.*

To publish a calendar **event** to the **main calendar**:

1. Navigate to the **folder** where you want to add the **event**. This could be your **my folder** or a **folder** in a **Group** that you are associated with.

You might consider creating a folder named **Events** in your my folder and placing events in this.

2. Click the **add item dropdown menu** and select **event**. The **Edit Event** screen appears.

3. Click in the **Title** field and give the **event** a short **title**. *The **Title** is used to identify your **event** to portal visitors, and in searches. This is required.*

4. Click on the **Description** field and type a description. A **description** is a one-paragraph text abstract. It accurately and concisely describes your **event** though inclusion of key words. Accurate keywords in the description ensure that the content will be found during a search. *This is required.*

5. Set the **Event starts** date and time, by selecting from the series of dropdown menus. *This is required.*

6. Set the **Event ends** date and time, by selecting from the series of dropdown menus. *This is required.*

7. Type an optional **Event location** in the corresponding field.

8. Type an optional **Announcement** in the corresponding field.

9. Type **Attendees** in the corresponding field. This is optional.

10. Click to select what **Event type** this is. Choices are **Appointment**, **Convention**, **Meeting**, **Social Event**, and **Work**. *This is required.*

11. Type an optional **Event URL** in the corresponding field. This describes the URL to a website associated with the event. This must be in the format: **http://www.<site>.<domain>**

12. Type an optional **Contact Name** in the corresponding field.

13. Type an optional **Contact E-mail** in the corresponding field.

14. Type an optional **Contact Phone** in the corresponding field.

15. For the purposes of this tutorial, you can ignore **Related items**.

16. Decide if you want other logged-in portal users to be allowed to **comment** on your **event**. By default, **comments** are disabled.

- To **enable** comments, scroll to **Allow Discussion on this item** and click the **Enable** bullet.
- To **disable** comments, click the **Disable** bullet to prevent discussion on this item.

17. Click the **Save** button. Your **image** will be uploaded to the portal and saved. *If you do not click **Save**, your link will not be created and saved for future use.*

18. Your **event** is created in a **private state** that only you the owner, and those users and groups that your share with, can view. Using the **state dropdown menu**, you may choose to:

   a. Change the **state** of your **event** to **public draft**, and:

   b. Either **submit** your **event** *for review and publication by portal editorial staff*, or;

   c. If you have permission to do so, **publish** your **event** yourself.

   d. For more information on setting **state**, see [Content has a State](#).

19. You may now, or later, want to [edit](#) your event, revise it's [properties,](#) [delete](#) it, or [share](#) it with other users and groups.

Add a Private Calendar Event

Private events are listed on private Group Calendar's only, and not on the public **calendar tab**.

To add a private event:

1. Go to a **Group** folder of which you are a member. Groups are listed under the Groups tab,

2. In your **Group** look for an object named **"<yourgroupname> Group Calendar"**, for example, "Energy Team **Group Calendar**".

3. If there is no **Group Calendar** listed in your **group**, one will need to be setup by a portal administrator. *To request a Group Calendar, email your request to info@nrmre.org*. Be sure and let us know what group you would like the calendar added to. You will be notified as soon as the calendar has been created.

4. Click on the **Group Calendar** folder. You will see your **Group Calendar**, in the **default month view**. Other views are possible by clicking the tabs at the top of the calendar.

6. Click the link at the **top left** of the Calendar labeled "**Add New Event**".

7. Add a Calendar Event:

- **Title**: (**Required)** Type a meaningful title, or name, for the event.

- **Description:** Type a brief one-paragraph description of the event.

- **Event Starts**: (**Required**) Select the date and time the event starts.

- **Event Ends**: (**Required**) Select the date and time the event ends.

- **Event Location**: Type where the event will happen.

- **Event Announcement**: Type any details about the event.

- **Attendees:** Type names of people attending the event.

- **Event Type**: (**Required**) Select the type of event: Appointment, Convention, Meeting, Social Event, or Work.

- **Event URL**: If there is a web page associated with the event, type that here.

- **Contact Name:** Type the name of the contact person for the event.

- **Contact E-mail:** Type the email address of the contact person for the event.

- **Contact Phone**: The phone number of the contact person for the event.

Click the **"Save"** button (**required**).

*Important! Change the Event object **state** from **public draft** to **make private**. The **state drop down-menu** us in the **upper right corner** of the portal content area. This assures that the event will only show up on your private Group Calendar. If you want your event to be listed on the main portal calendar as well as your Group Calendar, **publish** your the event.*

8. To **check that your event shows up on your Group Calendar**, navigate back to your Group Calendar. The event should now appear. The event *should not* appear on the main Portal Calendar, or on any other Group Calendar.

10. **If you want to modify, change the state of, or delete a calendar event**, locate the Events folder in your Group. Group Calendar events are stored there. **Delete an event in content view, or click on the event to modify**, making sure to **save,** and then set the state to private or publish.

Content Actions: The Contents Tab

The **contents tab** provides a **tabular view** of the **contents of a folder**. It also allows you to **reorder** content, **rename** content, **change** the state of content, **cut**, **copy**, and **paste** content, and **delete** content.

*If you do not see a **contents tab**, you do not have permission to perform actions on the content.*

If you think you should be able to perform actions on the content, email your request to the portal administrator at info@rmportal.net.

List Content

1. To list the contents of a folder, click on the folder's **contents** tab. A tabular listing of contents is shown. *If you do not see a **contents tab**, you do not have permission to manipulate the content.*

This tabular view lists each item's **title**, **size**, **last modified date**, **state**, and folder **order**.

Reorder Content

To **reorder** the individual items in a folder, **upwards** or **downwards**:

1. Click on the folder's **contents** tab. *If you do not see a **contents tab**, you do not have permission to reorder the content.*

2. Locate the **up** and **down arrows** in the **order** column.

3. To move an item up in the folder listing, click the item **up** arrow.

4. To move an item down in the folder listing, click the item **down** arrow.

Rename Content

To rename one or more items stored in a folder:

1. Click on the folder's **contents tab**. *If you do not see a **contents tab**, you do not have permission to rename the content.*

2. Place a **checkmark** next to the item(s) you wish to **rename**. Checking multiple items allows for multiple renaming.

3. Click the **rename** button.

4. Each item has a **Short Name** and a **Title** that you can change.

- Typically you should not change the *auto-generated* **short name** (file name).
- Type a new **title**.
- Repeat for each **title** that you want to change.

4. Click the **rename all** button. The title(s) is/are changed.

Cut, Copy, and Paste Content

Items can be **cut**, **copied**, and **paste** within and between folders. To **move** (cut) or **copy** items:

1. Click on the source folders **contents tab**. *If you do not see a **contents tab**, you do not have permission to cut, copy, or paste the content.*

2. Locate the item(s) that you want to **cut** or **copy**. Place a **checkmark** next to that item(s).

3. Click the **cut** or **copy** button.

- **Cut** and **paste** will *remove* the content from the original location

- **Copy** and **paste** will *copy* the content, leaving it both in the source location and in the target location.

4. **Navigate** to the **folder** where you wish to **paste** the content.

5. Click the **paste** button. The content will either be *moved* (cut) or *copied* (copy) there.

*Note that **cut** content is not removed from the source location until it is pasted.*

Change the State of Content

The state of content can be changed individually or as a group. To change the state of an item(s):

1. Click the **contents tab** and locate the item that you want to change the **state** of. *If you do not see a **contents tab**, you do not have permission change the state of the content.*

2. Place a checkmark next to the item(s) that you want to change the state of.

3. Click the **change state** button. The publishing process screen appears.

4. Scroll down to the Change State section near the bottom of the page.

5. The states that you have permission to change the content to are listed.

6. Click the **bullet** next to a new state. *Note that if content is published, it must be **retracted** before it can be edited further.*

7. Click the **save** button. The state of the content you have selected is changed.

Delete Content

You can delete content that you have created, that you have shared ownership of, or sufficient privilege to delete.

1. To delete content, navigate to the folder where the content is located.

2. Click the folder's **contents tab**. Folder content will be listed in a table. *If you do not see a **contents tab**, you do not have permission delete the content.*

3. Place a **check mark** next to the content you wish to delete.

4. Click the delete button. Content is deleted.

Undo

Undo is an option available as a link on the orange **global actions** bar. *It is unreliable and we would not suggest using it.*

Content Actions: The Edit Tab

You may decide that some part of your content needs to be changed.

1. To edit content after it is create, navigate to the content, and click its **edit** tab.

2. Make any changes to the **Title**, **Description**, other properties, or **Comments** status.

3. Click the **Save** button, to save your changes.

Content Actions: The Properties Tab

You may set additional properties on the content you have added.

1. To set properties on content, locate the content, and click its **properties** tab.

2. Properties that can be set are:

- **Exclude from navigation** – checking this box makes the content not appear in the navigation menu, under any circumstances.

- **Keywords** – select from a global list of keywords that identify this document. We don't really suggest using this feature, as keywords placed in an items description

- **Contributors** – you can list authors and contributors to the content here.

- **Creators** – by default the username of the owner (creator) of the document.

- **Effective Date** – Setting this property will make the content not display until the effective date that you have set here. We suggest ignoring this property unless you have reason not to.

- **Expiration Date** – Setting this property will make the content no longer display after the expiration date that you have set here. We suggest ignoring this property unless you have reason not to.

- **Language** – The Language of the document. This defaults to the language that the content was created in.

- **Copyrights** – include any specific copyright wording that applies to the content. It is suggested that content creators do this, if copyright issues apply. See HOWTO: Copyright and Fair Use for more information on copyright implications and restrictions.

3. Click the **Save** button, to save your **properties** changes.

Content Actions: The Sharing Tab

You may share private content with other portal members and groups.

Sharing with Portal Users

1. To share private content with a portal member(s), locate the content, and click on its **sharing** tab.

2. Scroll down to **Add sharing permissions to users**.

3. Click the **Search by** dropdown menu to search by **User Name**. Type a user's name, and click the **perform search** button. If the user is found on the portal, they will be listed, with a checkmark placed next to their name.

4. Select a role to apply to the user or group to share with. Selecting the **owner** role will let that user or group edit the content, selecting reviewer will let that user or group review and publish the content. Both may be selected by ctrl-clicking as many roles as you want.

5. Click the **assign local role to selected user(s)** button. The content is shared. At the top of the page you can see a listing of the share name, type, inherited role and local.

6. Repeat the procedure to add users.

Sharing with Portal Groups

1. To share content with portal group(s), locate the content, and click on its **sharing** tab.

2. Scroll down to **Add sharing permissions to groups**.

3. Note that all portal groups are listed. Place a checkmark beside the group(s) that you want to share the content with.

4. Scroll down to **Role to assign** and click or ctrl+click to select one or more **roles**, and click the **assign local role to selected user(s)** button. The content is shared at the role level(s) you have selected. At the top of the page you can see a listing of the share name, type, inherited role and local.

Manage Content in My Folder

Your **my folder** area is your personal workspace on the portal. Your entire **my folder** can be made **private** or **published**, and regardless of **state**, can contain **private** and **published** content (**folders,** web **pages**, web **links, files**, **images**, **flashmovies**, **news items**, and calendar **events**). In order to grow a directory of portal members, portal members are encouraged to **publish** their **my folder** because, *only members who have published* their personal **my folder**, will be *searchable* by other portal users. In addition, every member is encouraged to publish a viewable **welcome message**, **home page** or **brief description of themselves or their work**, *when appropriate.*

Inside **my folder** *you control* how the contents you place inside your folder are handled.

Public Folder with Private and Published Content

- When you're **my folder** is **published** your folder is visible to the portal public.

- Even if you're **my folder** is **published** you can still create **private** folders and add private content that *only you can see and work with*. Through the sharing tab, you can allow this private content to be accessed by select portal. *See the discussion on sharing.*

- If you wish to make available your content to *all logged in members*, you can add folders and content for public view in the **public draft** state.

- For the benefit of the greater portal community (*non logged in anonymous users*), you can **publish** the content directly in your **my folder** area allowing all portal visitors to view.

- For higher visibility, you can **send the documents** you wish to share with the global community **to the portal's shared public space** (**library**, **training**, **links**, and **help)** and create a linking system to your content in the shared public space from your personal **my folder**.

Private Folder with Private and Published content

- If you choose to make your **my folder** area **private** you're **my folder** will be *hidden.* In addition, inside you're **my folder** area you can make all the added folders and content **private**.

- You can share **private** content in you're **my folder** through the sharing tab with select portal members that you invite. *See the discussion on sharing.*

- Even if you're **my folder** is **private** and therefore hidden you can still post content for public view as **public draft.** For logged in members to access this **public draft** content you must direct them to the location of the **public draft** content (the relative URL inside the portal) or as a logged in member they can "find" and "open" the content using the **Search** portlet.

- For the benefit of the greater portal community (non logged-in anonymous users), you can **publish** content directly in your private **my folder**. This allows the content to be **searchable** by *all visitors* to the portal.

- For higher visibility, you can **send the documents** you wish to share with the global community **to the portal's shared public space** (**library**, **training**, **links**, and **help)** and create a linking system to your content in the shared public space from your personal **my folder**.

My Folder Exercise

In this exercise you will:

- Create and edit a searchable **public draft** home page

- Adding a brief biography or welcome note to your existing **Home page**,

- Adding private **content** to your **my folder** area,

- Sharing your private content with an invited colleague you select, via the **sharing tab**.

Your Homepage

Note: Your home page is a web page. (You can edit your homepage text using the **Kupu** HTML editor, HTML, or plain text. Kupu allows you to edit content in a text editor similar to a simplified Microsoft Word.

Set Kupu as your default text editor

1. Click on the **preferences link** (on the top right bar with your login).

2. Scroll down to **member preferences**.

3. Click on **personal preferences**, scroll down the page to **content editor**, and select **Kupu**.

4. For more information on setting Kupu as a personal editor, see the section on setting preferences.

Edit your Homepage

1. Click on your **my folder**.

2. Click on the **contents** tab (top left of your folder area).

3. Click your **Home page.**

4. Click on the **edit tab.** The **Edit Page** screen appears

5. Type in a **Title**.

6. Type a **Description**.

7. Type detailed information into the **Body Text** field. Enter a brief biography or note about yourself or your work.

8. Click **Save.**

*9. Locate the state tab (top right): The state should be **public draft**. If it is not, click on the **state dropdown menu**, and change the selected value to **public draft** now.*

Add a Private Folder to your Public Draft my folder area

1. Find the **orange global prefere**nces bar beneath the banner of the portal.

2. Click on your **login name** link. This is an alternative way to get to you're **my folder**.

3. Click on the **contents** tab, which is located at the top left tab of your folder area.

4. Click on **add item dropdown menu**, located at the top right of your folder area, and select **folder**. A new folder is added to you're my folder, and the **Edit Folder** screen appears.

5. Type in a **Title**.

6. Type a **Description**.

7. Click the **Save** button.

8. *Notice the state setting at the top right of the content area. It should be set to **private** by default.*

Add a link to published content residing on the portal

1. Click the **contents tab**.

2. Click the **add item dropdown menu** and select **link**.

3. Type in a **Title**

4. Type in a **Description**

5. Type in or paste in the published **URL** where the published content resides on the Portal

6. Click **Save**

7. *Notice the state setting at the top right of the content area. It should be set to **private** by default.*

Share your private content with a colleague you select

1. Click on the **sharing tab** of your **link**. Note if you click the **sharing tab** directly from the link you just made you will get a message:

> "Attention! You are setting the sharing permissions for a **link**. If you want to set the permissions for its container, click here."

2. Either click the word 'here' to share the entire private folder, or proceed to share the link only. Note that in most cases you only will want to share the content, that is, the link in this case.

3. Scroll down to the line: **Add sharing permissions to users**, or you can scroll further and share with a **group**.

4. Click the **Search by** dropdown menu to search by **User Name**. Type a user's name, and click the **perform search** button. If the user is found on the portal, they will be listed, with a checkmark placed next to their name.

5. Select a role to apply to the user or group to share with. Selecting the **owner** role will let that user or group edit the content.

6. Click the **assign local role to selected user(s)** button. The content is shared. At the top of the page you can see a listing of the share name, type, inherited role and local.

7. Repeat the procedure to add additional users if needed.

Review your Exercise

1. Find the **orange global preferences** bar beneath the banner of the portal.

2. Click on your **login name**. You are taken to your **my folder** area.

3. Click the **contents tab**.

4. You should see listed your **Home page** and all your content contained in the folder:

- Content type (folder, page, file, link, etc.) and Title.
- Size of the content, in kilobytes
- Date last modified
- State: private, public draft, published
- Order of listing in the folder

Manage Content in a Group

A **Group** is a feature of the Portal designed to support members who have decided to *work together on a mutual task or initiative*. Setting up a **group** enables portal members to easily post, exchange, and manage **folders,** web **pages, links, files** (example: Microsoft Word documents, Adobe Acrobat documents, Spreadsheets, PowerPoint presentations, and other file types)**, images, flashmovies, news items, and calendar events.**

Group functionality also allows **group members** a mechanism to communicate in a centralized, organized space online**.** A **group** and all its respective **members**, *share a common work folder with certain privileges to the content posted inside*. Logged in Members outside of a **private group** do not have access to this private group folder or the content inside *unless* the private group posted the content as a public draft. Non-logged in members cannot access the private folder or the content inside the private group unless the content has been **published**.

The *Brasil Environment Team* is an example of a **group** folder. A portal member can belong to *one or many different groups*. A group can be designated **private** or **published.** A **private** group can contain private and published content. A **published** group can contain public or private content.

Private Group

- When a group is designated **private** only the portal members *assigned* to this group will be able to see the group folder and the content that the group members post privately.

- To assign a new member to a private group, email the portal administrator. When requesting a new member, include the member's **full name** (first and last), **email address** and **group association**.

- You can share private content through the sharing tab with Portal members NOT in your group. NOTE: Using the sharing tab does not give the member full privilege within your private group. *See the discussion on sharing.*

- *A private group can post content for public view.* There are two ways of posting for public view: post as a Public Draft, for logged in members to see, and for the greater portal community (non logged-in anonymous users), the private group can *publish* the content for global visitor viewing. In the RM Portal **Conditions of Membership** every Private group is encouraged to Publish a viewable abstract describing the Group, and share, where and when appropriate, content used during a Private group work session or content resulting from the Private work session.

- *In a private group all members will assume the* **manager role***.*

Published Group

- When a group is designated **published**, *all visitors*, even those labeled as "Anonymous Users" (users without a login and password), will be able to see the folder and access the contents of the group, as long as the content is not private.

- A **published group** *can 'hide' or make specific content 'private'* inside its published group folder. However, this private content must be *shared* with the group via the sharing tab). **See discussion / How To on sharing**. When anyone not invited to share content attempts to open private content in a **Published group** they will get a message that tells them they do not have sufficient privileges to view

the content and if they believe they received the privilege message in error, to please send an e-mail to info@rmportal.net.

- In a **group designated published** there can be three levels of Roles: **Member**, **Reviewer**, and **Manager**.

The following steps demonstrate *how members can use and collaborate within a **Group***.

Steps for Using a Group

1. To use a **group**, login to the portal.

2. Click the **group** tab

3. You will be taken to a **group** page

4. You will see the groups that are published and / or groups that you are a member.

5. Click on the Group that you wish to enter. You will be taken to that groups' folder area

6. Each group area may be organized differently depending on the needs and decisions of the group.

7. *A very important point to note is that if your role for the group is MANAGER you have the ability to add, edit, and DELETE content in the group folder. Please be considerate of other member's activity in your group.*

Setting Up A Group

*A **group** can only be setup by a portal administrator.*

To request that a group be setup, email the portal administrator with your request at info@rmportal.net.

Please provide the following:

- Name of the group requested,

- A description of the group,

- The full names and emails of each member you wish to include,

- If you want a private group calendar,

- If you want a private group news folder,

- The **state** of your group, **private** or **published**. We strongly suggest that your group be set to private.

Adding an additional member to the group

Additional group members can currently only be added by the portal administrator.

To request a new group member, email the portal administrator at info@rmportal.org with your request.

Please include:

- The new members full name,

- The new members email address,

- The name of the group that the new member will be associated with,

- The member's role, if the group is published (member, reviewer or manager).

NOTE: if your group is private, all added members have the manager role and privileges. If you do not provide this information, we cannot add the member to your group.

Group Folder Exercise

In this exercise you will learn how to work in a private group while linking to content you publish to public space on the portal.

Comment: Will we be able to provide and install files in a lab situation for this exercise? Exercise should provide some direction as to where file to be uploaded can be found.

Add the Content first inside Your Group

1. Click on the **group tab**.

2. Scroll down and click to enter your group

3. Click the **contents tab**.

4. Click on the **add an item dropdown menu**.

5. Select **file**.

6. Type in the **Title**.

7. Type in a **Description**

8. Click the **Browse button** and locate and insert your file.

9. **Save**. Please note that large files can take a longer time to upload.

Create a Copy of your Content

1. Click on the **Actions tab**

2. Select **copy** or **cut** as desired.

3. Locate the public space where you wish to publish (share) your content. For example, click the **library tab**.

4. Locate the folder titled: **Public Draft: Pending Publication Folder**

5. Click the **content tab**.

6. Click the **paste button** to paste your file. You will see the message on top: **Items pasted**.

7. Click on the draft folders **contents tab**. You should see your content.

Note: You will receive an email message from the portal librarian acknowledging receipt of your posted content. The librarian will send you the URL indicating where the content resides once it is published.

Create a link to the Public content from your Private Group

Once you receive the URL of the published content you can create a link from your private group workspace.

1. Navigate to your **group**'s folder.

2. Click the **contents tab**.

3. Click on **Add an Item**.

4. Add a **link**

5. Type in a **Title**

6. Type in a **Description**.

7. Type in or paste in the published **URL** that you received from the librarian

8. **Save**.

*Notice the state of the item: It should have defaulted to **Private.***

Delete the extra copy of the document

Once you have created a **link** to the published content you can **delete** the redundant file from your group area.

1. Click the **contents** tab, located at the top left of your folder area.

2. Find the file you wish to **delete.**

3. Put a check in the box next to the **file**.

4. Click **delet**e on the bottom bar. The content is deleted.

Review your Exercise

1. Click the **groups tab**.

2. Click on your **group**.

3. You should see your **link** to the content you posted in the portal public space.

Submit Content for Shared Public Areas

*To post content to the **Library**, **Training**, **Links**, or **Help** folders, your content must be placed into a folder for review by portal editorial staff.*

Content is member-generated information like web **pages**, **links** to web resources, **files**, **images**, and **flashmovies**.

The folder is named:

- **Public Draft: Pending Publication Folder**

There are four instances of this folder, one each located in:

- The **library** folder.
- The **training** folder.
- The **links** folder.
- The **help** folder.

Content placed in these folders will then be **reviewed** and **published** or **rejected** by portal editorial librarian staff, which will assist with "appropriate placement" of content for easy access by portal visitors.

Submitting Content for Publication

To **submit** content for **review** and **publication** into the portal **Library**, **Training**, **Links**, or **Help** folders:

1. Place your content in the **Public Draft: Pending Publication Folder** of the **library**, **training**, **links**, or **help** areas of the portal.

2. You content must have a **title** and **description** conforming to portal standards:

- **Title:** best identifies the content in a clear, concise, and grammatically correct way.
- **Description:** a keyword rich abstract describing the content.

3. Make sure you have properly identified ownership of the content. Click on the content's **properties** tab, and select all that apply:

a. **Contributors**: The names of people that have contributed to this item.
b. **Creators:** Persons responsible for creating the content of this item.
c. **Copyrights:** The copyright on the item if appropriate and known. For procedures on how best to label content or compose a description see the section on Copyright and Fair Use

4. A portal librarian will review your content and if approved, place it into an appropriate folder. You will be notified by email when the content has been posted or if there are questions. You will also be sent the exact place where the content has been posted (URL address on the RM Portal). You will then be able to "link" to your content that you shared in the Portal Public Space.

Refer to [Add a Link](#).

For more information, or if you have questions, send an email to info@rmportal.net

TODO

- Remove Comments from this document.

- Add **Conditions of Membership** document to help folder, to footer, to login portlet, screen and logged in messages.

- Smart Folders (deferred: see Add a Private News Folder for a *Smart Folder* example.)

- Newsletters (not currently functional)

- Group Email (not yet implemented)

- Forums (not yet implemented)

- Group Workflow (not yet implemented)

- Review any needed Calendar functionality