Using the CORDS Website

Client	CORDS
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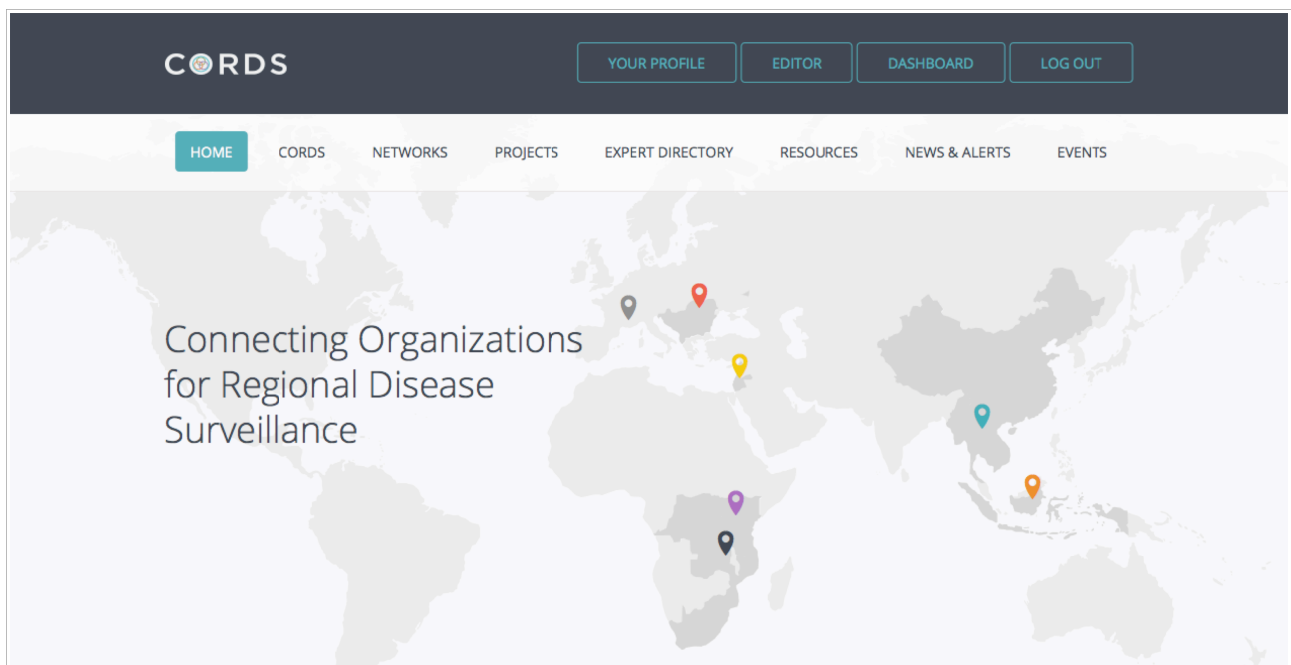
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1. Introduction

This guide aims to help CORDS network team members create and update content for their network on the CORDS website.

It has been written to coincide with a tutorial session; however the reader should be able to successfully use the guide without having attended the tutorial.

The CORDS website address is:

- **www.cordsnetwork.org**

The addresses www.cordsnetwork.com and www.cordsnetwork.net redirect to the main address.

Please note that this guide does not contain advice or policies about who should be adding content, which content they should be responsible for, etc. It simply aims to show the reader how to interact with the site and in particular the Editor.

2. Site Overview

2.1 Site Sections

The CORDS website is in two sections:

1. A collection of pages that can be accessed by anyone visiting the site. This is called the public area.

2. A further collection of pages that can only be accessed by someone with a username and password for the site. This is called the members' area.

When using the CORDS website, the main menu below the header shows the main links for the public area, like this:
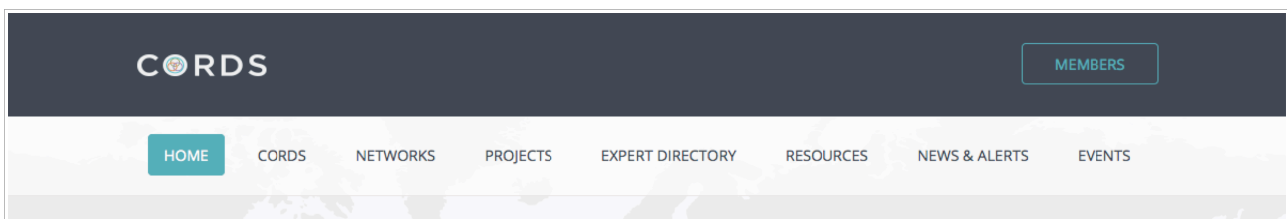
However, when the user has logged in (see next section), the main menu switches to show the main links for the members' area, like this:
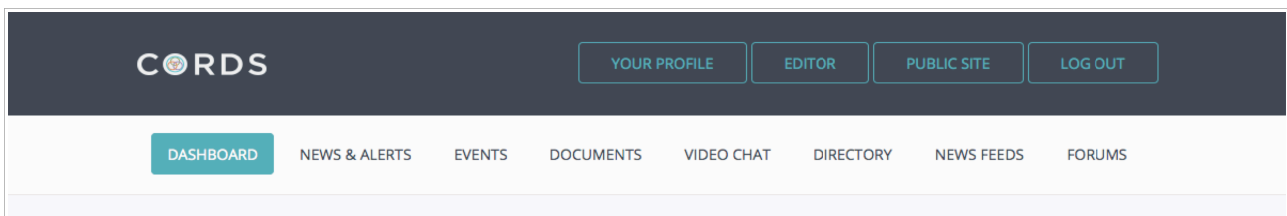
A logged-in user can switch between the two by clicking the 'Dashboard' button in the header when they are in the public area, or by clicking the 'Public Site' button in the header when they are in the members' area.

2.2 Site Content

The site's content structure is reviewed on a regular basis and sections or pages may be removed or added from time to time, so that the site reflects the usage patterns and needs of CORDS and its member networks.

2.2.1 Public Area

The **front page** serves to introduce CORDS to the visitor, and presents summary information about

CORDS along with featured news articles.

The **CORDS page** presents a more detailed description of CORDS with information about its objectives and funding, and milestones in CORDS' history.

The **Networks page** introduces the various organisations that make up the CORDS network, with each organisation having its own page to promote its objectives and activities.

The **Projects page** introduces one of CORDS' core activities – the co-ordination of projects involving two or more network organisations. Each project has its own page, and further development work is being done to allow each project to have a number of 'tabs' with content under each tab. This will allow projects to be presented in a more structured way.

The **Experts Directory** aims to be an easy way to the public to see who are the experts in particular fields that CORDS is concerned with.

The **Resources page** comprises a document library and a photo gallery. The **document library** is the correct place for offline documents (for example, PDFs, spreadsheets, etc) to be made available to the public. The **photo gallery** allows networks to showcase events they have been involved in.

The **News & Alerts** page is the place for articles intended for public consumption – all time-sensitive information should be presented here.

The **Events page** allows the CORDS member networks to alert the public to relevant events.

2.2.2 Members' Area

The **Dashboard page** pulls together recent updates from various pages within the members' area.

The **News & Alerts page** is for articles and other time-sensitive information that should be available to CORDS network members but not the general public.

The **Events page** is for events that are offered to CORDS network members but not the general public.

The **Documents page** is for offline documents (e.g, PDF, DOC, etc) that should be available to CORDS network members but not the general public.

The **Video Chat page** allows CORDS network members to set up a scheduled video chat with each other, in much the same way that GOTOMeeting works. It should still be considered an experimental feature, and though it works fine on Firefox and Chrome, it does not work on more primitive browsers like Safari or Internet Explorer.

The **Directory page** provides a contact directory for CORDS network members.

The **News Feeds** page can 'aggregate' (combine) articles from a number of RSS feeds. At the moment only 1 feed is being fetched but more could be added.

The **Forums page** provides a full-featured private discussion forum for CORDS network members.

3. Logging In and Out

3.1 Logging In

To log in as a network member, simply click the 'Members' button at the top right of the screen, and a login form will appear below the site header. Enter your username and password and click the 'Log In' button.

Once you are logged in, you are taken to the Dashboard page (the first page of the members' area) and the 'Members' button top right will be replaced by a set of four buttons – 'Your Profile', 'Editor', 'Public Site' and 'Log Out'.

3.2 Logging Out

If your computer is in a shared space and you are going to be away from it for a while, or if you share the computer with someone else, you should log out of the CORDS website whenever you are not using it by clicking the 'Log Out' button.

3.3 New Members

There is no online registration process – when a new network team member needs a login, they should contact a CORDS programme manager.

3.4 Lost Passwords

If a network team member forgets or loses their password, they should contact a CORDS programme manager and a new one will be issued.

4. The Editor

The Editor page provides a user-friendly way for CORDS network members to add, update and remove content from the various parts of the site, without having to access the site's administrative back end.
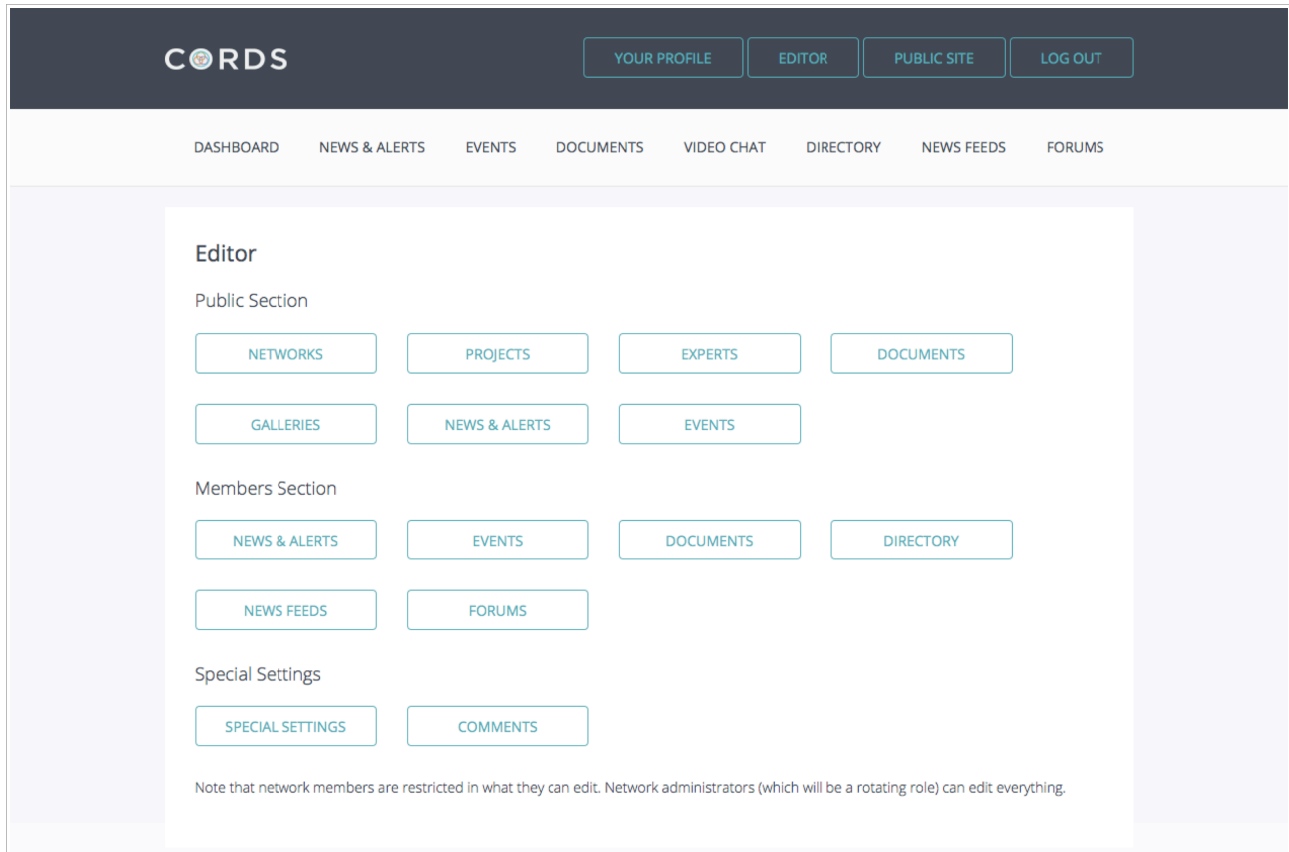

Most of the editing screens (accessed from the buttons on the main Editor page) have a lot in common. For example, text is edited the same way across all editing screens, images are added the same way across all editing screens, etc.

4.1 Editing Content

When you select a particular section on the Editor page, you will generally see a list of the content you have chosen to edit, for example a list of articles, or a list of events, etc.

You can then click the 'pencil' icon next to an event to edit it, the bin icon to delete it, or the 'Plus' icon above the list to add a new event. Virtually all of the Editor screens work this way and an example of the 'list' screen is shown overleaf.
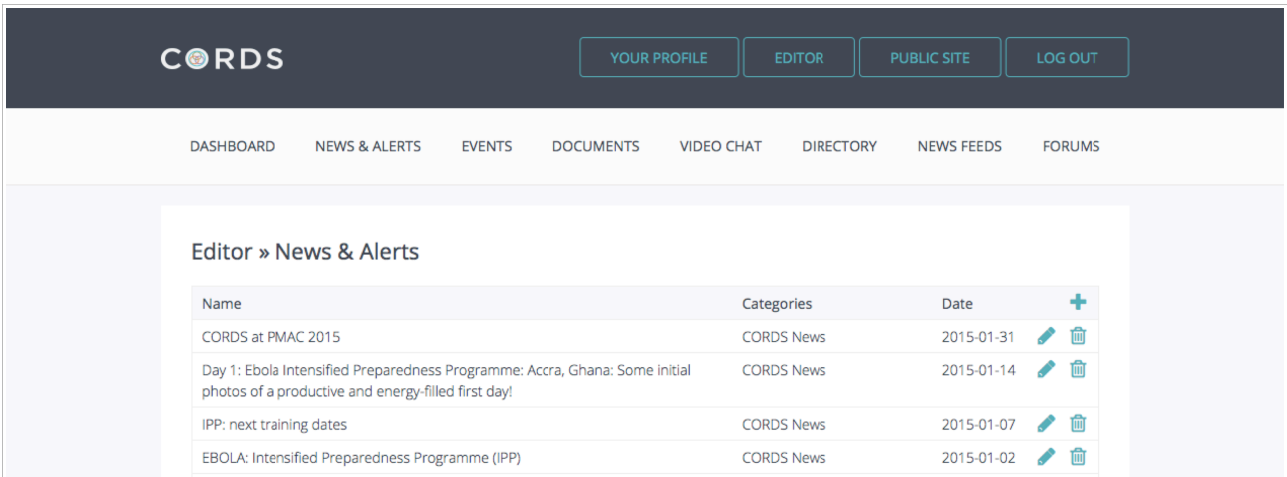
When you edit a piece of content by clicking the 'Pencil' icon, you will see a screen like the one below. The screen shown is for the public News & Alerts section, though other screens look very similar.
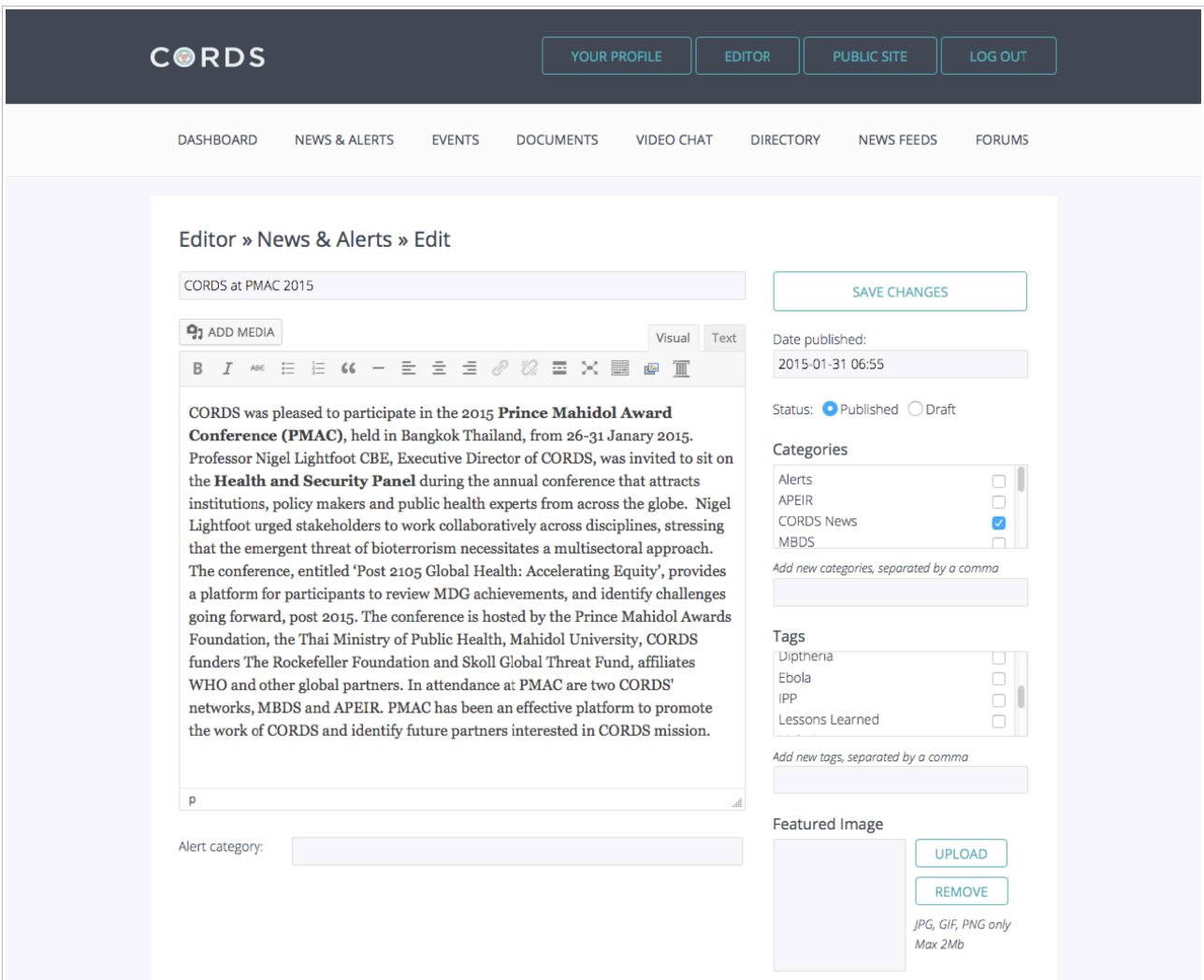
4.1.1 Editing the Title

The first box on each edit screen is for the title of the content (article title, event name, etc). This can be changed later if needed.

4.1.2 Editing the text content

Most types of content (articles, networks, events, etc) have one or more main sections of text content, and these are edited using a WYSIWYG (what you see is what you get) editor.

The editor works like a very basic version of Microsoft Word, with icons to control things like bold, italic, alignment, links, font size, etc.

The main text editor is the large panel on the left with the row of icons above it. The third icon from the right (if you hover over it, it says 'Toolbar Toggle' will add another row of icons when clicked. These icons are used less so they are hidden by default, but they will still be useful from time to time.

Some types of content (e.g. Project) have more than one main text editor panel. When this is the case, all the panels work in the same way, and providing more than one panel simply allows the site to place the content in certain places on the page.

4.1.3 Editing the Date

The **Date Published panel** can be left alone and will be completed automatically by the site if so. However, if editing a piece of content later, the date can be changed if needed (for instance, to get news or alerts to appear in the right order).

4.1.4 Editing the Status

The **Status section** lets you decide whether a piece of content should be shown on the main pages of the site ('published'), or hidden ('draft').

4.1.5 Editing the Taxonomies

On some types of content there are also **Category panels** on the right side of the editor screen. These can be called Categories, Tags, Regions, etc and they let you associate a piece of content with a particular keyword, which can make searching easier on the main pages of the site. You can add new categories when needed. The correct name for these lists of keywords is **taxonomies**. So, the News & Alerts section has a categories taxonomy and a tags taxonomy, etc.

4.2 Managing Images

There are two kinds of image that can be associated with a piece of content. There are **'normal' images**, which are uploaded into the main text editor and appear part way through the text content (wherever the cursor was when uploading them), and there are **'featured' images**, which are uploaded using a separate panel on the right of the editor screen and which are always placed in a certain way in the content.

If you upload images that are larger in dimension than 1024 x 1024 pixels, they will be reduced to that size before being stored in the media library. However, it is always best to shrink images to no more than 1024 x 1024 pixels before uploading, since this makes uploading much faster. There are many

free image resizing apps available for both Mac and PC.

IMPORTANT: You can upload JPG, PNG or GIF images. Other types such as TIFF or BMP should not be uploaded. The recommended type is JPG.

4.2.1 The Media Library

Whenever you upload an image (or document), it is added to the site's Media Library. This means it is available permanently, for addition to future content as well as the content where it is initially placed.

Whenever you choose to upload an image (or document), a big popup opens, with two tabs – behind one tab you will find the Media Library so you can pick an existing image, behind the other is the option to upload a new item.

The Media Library does not contain any images uploaded to the Galleries. They are stored and managed separately.

From time to time the webmaster will clear out images and documents that are not used (i.e. not placed in any content).

4.2.2 Normal Images

To upload an image into a content item (e.g. an article), you should place the cursor where the image should be shown in the main text editor. Then click the Add Media button and the Media Library popup opens. From here you can upload a new image or choose one from the Media Library.
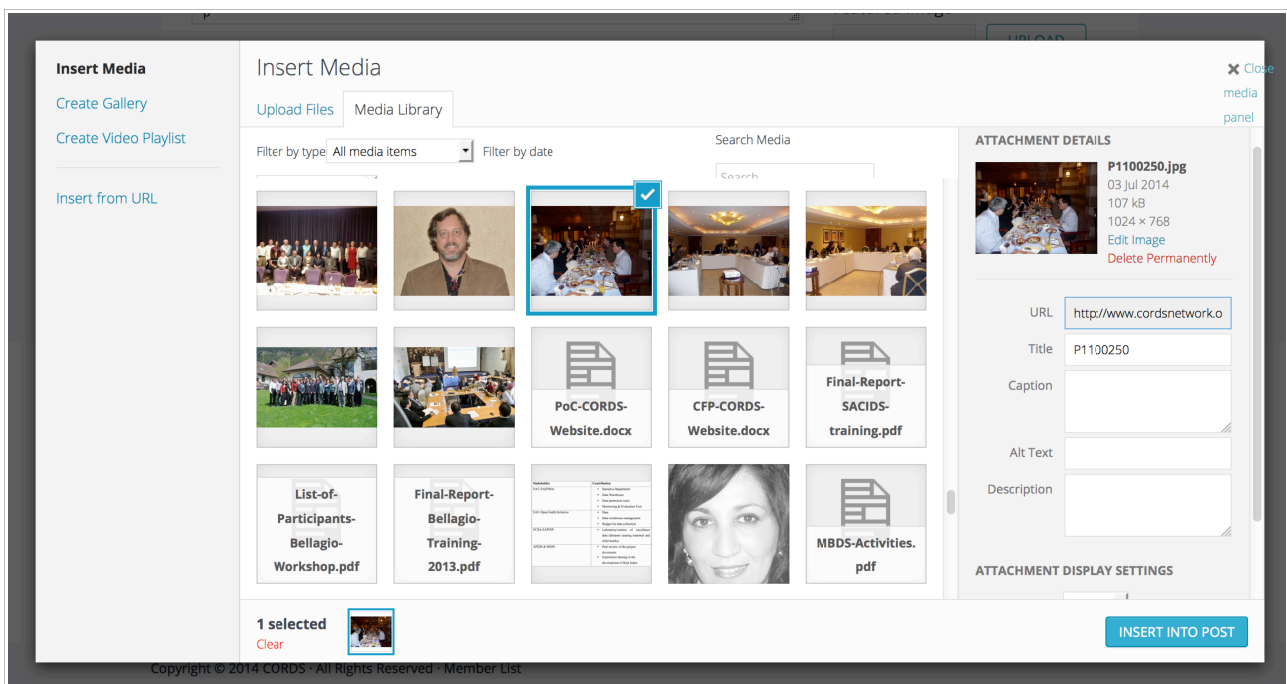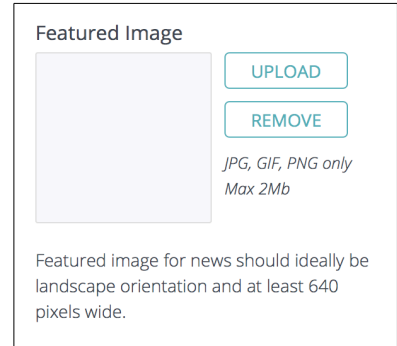

When you choose an image by either uploading or clicking an existing one, look at the right side of the popup, at the Attachment Display Settings panel. Here you can choose the size the image should be shown at, its alignment (left, centre or right), and whether clicking it should link anywhere.

4.2.3 Featured Images

The upload process for featured images is the same, except that the process is started by clicking the Upload button in the Featured Image panel, instead of the Add Media button above the main text editor.

The Featured Image panel includes advice about what size image to upload.

Featured Image

UPLOAD

REMOVE

JPG, GIF, PNG only
Max 2Mb

Featured image for news should ideally be landscape orientation and at least 640 pixels wide.

4.3 Managing Documents

A document can be included (as a downloadable link) in a piece of content just like an image. To upload a document, place the cursor where you want the link to be shown and then click Add Media as with image uploading. You can then either upload a new document or choose one from the Media Library.

When you upload a document, look at the Attachment Display Settings in the Media Library popup. The "Link to" box should always say "Media File". Above that, check the "Title" box – whatever text in here will be the text that becomes linkable.

5. The Editor – Section by Section

This section of the guide looks at each editing screen in turn and points out any specific differences from other editing screens.

5.1 Public Section

5.1.1 Networks

When editing a Network, there is one main text editor panel, and below that there are a number of fields for address and contact details. You can set the status, though not the date because that is not relevant. There are no taxonomies.

There are two featured image panels for Networks. The first one should always be the network logo, and the second one should always be the 'mini-map' of the network countries. Both these images are shown in the sidebar when viewing a Network page.

5.1.2 Projects

When editing a Project, there are **three** main text editor panels. These are all clearly labelled. The first editor panel contains the content that is shown on a Project page when the visitor clicks the 'More' button under the intro. The second text editor panel contains the introductory content shown above the 'More' button. The third text editor panel content is currently not used due to some changes with the site's structure.

Below the text editor panels, there are some additional fields to show which networks are involved in a project, when the project was started and what its current status is.

On the right, you can change the project status. There is also a featured image panel but images uploaded here are not currently shown due to some changes with the site structure.

5.1.3 Experts

When editing an Expert, there is no big text editor panel, instead there are a number of smaller fields for contact details. There is one featured image panel, designed for a profile picture of the expert if available. There are three taxonomies (categories): Region, Disease and Best Practice. By using these, you can make it easier for visitors to find experts in a particular field.

5.1.4 Documents

When editing a Document, there is no big text editor panel, instead there are three fields for uploading actual documents. The idea is that one document is uploaded initially, then newer versions can be added when available.

You can change the status of a document, and there is a taxonomy called Categories, which makes documents easier to find for visitors.

5.1.5 Galleries

The Gallery edit screen is very simple. There is a panel for uploading new photos, and below that any existing photos are shown, with Remove links. Unlike other content types, you cannot change the

name of a gallery after it has been created. When creating a gallery, you also have to choose the album it will be part of. There is one album for each Network.

Photos uploaded to the gallery will be resized to a maximum of 800 x 800 pixels before being stored, though as with featured images, it is best to resize before uploading which will make the upload process much quicker.

5.1.6 News & Alerts

When editing an article in the News & Alerts section, there is one main text editor panel, and a text field below it for adding an Alert category if needed.

There are two taxonomies, called Categories and Tags, to make it easier to search for an article. You can change the publish date of an article, and its status. You can add one featured image, which will be used if the article is displayed on the front page of the site, and is also displayed at a large size above the article itself.

5.1.7 Events

When editing an Event, there is one main text editor panel for describing the Event. Below that there are a number of fields for providing date, venue and contact details.

The Event editor lets you use two taxonomies (Region and Type) to make searching for events easier. There is one featured image panel which should be used for the Event logo if there is one.

5.2 Members Section

5.2.1 News & Alerts

The Network Members News & Alerts editor screen is exactly the same as for public News & Alerts.

5.2.2 Events

The Network Members Events editor screen is exactly the same as for public Events.

5.2.3 Documents

The Network Members Documents editor screen works the same way as the public Resources editor.

5.2.4 Directory

The Network Directory editor screen is very similar to the public Experts Directory editor screen. There is no big text editor panel, instead there are a number of text fields for contact details. There are two taxonomies, Regions and Diseases, to allow easy searching.

5.2.5 News Feeds

The News Feeds editor screen is very simple, and allows you to enter a title for the feed, and the feed URL. You can also set the feed status to show or hide the feed's results whenever necessary.

5.2.6 Forums

The Forums editor screen just lets you add forums, with a title and description. Most Forum activity (commenting, adding topics, etc) takes place on the main Forum page.

5.3 Special Settings

5.3.1 Special Settings

There are some particular settings relating to the site that can be managed on this editor screen.

Firstly, the featured News item that appears on the site's front page can be chosen on this screen.

The Project and Expert pages of the site also have a featured item, and that can be set here.

Finally, the main public Events page introduction text can be edited here.

5.3.2 Comments

Certain pages (mainly the News & Alerts) allow visitors to leave comments, and these comments must be approved before they show on the page where they were submitted.

Using this editor screen you can review comments that are submitted, and either approve them for display or mark them as spam. Comments marked as spam are automatically deleted after 30 days to stop things getting too cluttered.

6. Your Profile

You can change some of the information that makes up your personal profile on the site. You can do this by clicking the "Your Profile" button in the site header whenever you are logged in.

On the Edit Profile page you can change your email address, first name, last name, Network, time zone and password. If you are changing some of this information but not your password, please leave both password fields blank.

Below the details form, you can change your profile photo. This photo is used in the Forums section when you post to a forum.

7. Support

For support and help with using the website, you should contact the CORDS Director Strategy & Operations (Petra Dickmann). Petra may refer you to Andy Towler (the CORDS website developer and webmaster) but she should always be the first point of contact.