Faculty User Manual

for the

Plant Pathology Website

Last Update: 1/3/2012

Contents

Icons Used in This Manual

The dynamite icon indicates important information. Ignoring this information could have negative consequences.

The checkmark icon indicates helpful information to make things go more smoothly.

Overview

October 3rd, 2011, Plant Pathology launched a new website.

The new website uses a technology called a Content Management System, or CMS. This allows approved users to easily update webpage content without needing to learn HTML or Dreamweaver.

What This Means to You

After October 3rd, 2011, if you want content changed on the Plant Pathology website, you have three options:

- contact Laurie Ballentine and have her make the changes
- learn to use the new system and make the changes yourself
- designate a student to do the work and send them to Russell Labs Computing for authorization and training on the new system

Accessing the System

Logging In

1. Open a web browser (Firefox, Chrome, or Safari - *NOT Internet Explorer*).

2. Go to this webpage:

    http://www.plantpath.wisc.edu

    The screen changes to show the website homepage:

3. In the lower right corner, in the green footer, find and click Log in.

The login screen appears:

4. Enter your username and password for this system. Click Login.

The screen changes slightly to show you're logged in:

A. A menu block appears on the left side called My Menu:

My Menu

B. At the top of the screen, a black menu bar appears with a Logout link at the far left followed by your username:

Logging Out

1. In the upper right corner of the black menu (see above) locate the Log out link.

2. Click the Log out link.

Changing Your Password

1. From My Menu, click Edit my Account. Your Account screen appears:

2. Click in the Password box. Enter a new password, 8 characters or longer, including upper and lower case letters and at least one number.

3. Click in the Confirm password box. Enter the password again.

4. Scroll down and click Save.

If you need your email, first name or last name changed on the website, don't try to make the changes from this page.
The account screen contains fields for your email address, your first name and last name. However, the information stored from the account screen is used only inside Drupal. To change the email or names that appear on the website, you need to do it from the Current Faculty Profile edit screen.

System Timeout

- Please log out of the system at the end of each day.
- The system will not automatically "kick you out" during the workday and force you to login again. However, we may take the system down during the workday for emergency maintenance.
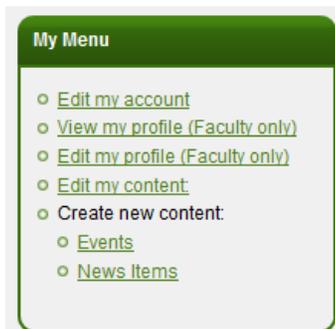
Save Your Work on a Regular Basis

You may login to the system and begin editing a page, only to be interrupted by a visitor, a phone call, or a more urgent task. The system does not have a "document recovery" system like Microsoft Office if your web browser crashes or your laptop battery charge runs out. Make a habit of saving the screen you're editing.

Navigating the System

My Menu

The My Menu link at the left side of the screen gives you direct links to create and edit content:

My Menu
- Edit my account
- View my profile (Faculty only)
- Edit my profile (Faculty only)
- Edit my content
- Create new content:
  - Events
  - News Items

- ***Edit my account -*** use this to change your password and to change the email address that your password notices are sent to. It is important that this email be up-to-date; if you lose your password, Drupal sends the information to retrieve it to the email address listed on the account page.
Note: do not change the first name and last name info on the account page. They do not affect your profile pages on the website.
- ***View my profile -*** shows you a preview of your Current Faculty Profile page.

- *Edit my profile -* use this link to go to the page to update your Current Faculty Profile. This page controls the information the two screens shown above - the Faculty Summary page and the Current Faculty Profile page.
- *Edit my content -* this link shows you all the content you've created (including Events and News Items) and lets you edit the content.
- *Create new content - Events -* use this link to create new Events. Events are tied to a time period. It can run one day or multiple days, and must have a start time. Today's events will appear on the website homepage in the "Latest" box on the right side of the page.
- *Create new content - News Items* - use this link to create News Items. News items are items you would include in a print or email newsletter. The last two News Items created will appear on the website homepage in the "Latest box" on the right side of the page.

Creating and Editing Content

Working with the Editor

Edit screens are used throughout the Plant Pathology website to create and edit content.

Multi-line information is entered using a multi-line text box:
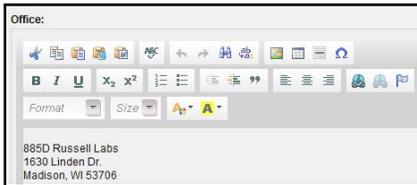
The multi-line boxes come with an editing toolbar. Many of the buttons on the editor toolbar resemble those in Microsoft Word:

How to Find Out What a Button Does

If you hover your cursor over one of the buttons on the editing toolbar, a popup window will appear telling you what the button does:

Edit with Two Browser Windows Open - One to Edit, and Another to Proof

Always check the results of your editing; what your editor box shows may not be identical to the finished version the website visitors see.

To Check the Results of Your Editing:

- Save your changes.
- Bring up another web browser, e.g. if you edit with Firefox, bring up a window in Internet Explorer.
- In the second web browser, use the website menu (Home, About Us, Graduate Study, etc.) to find the page you just edited.
- Click the Refresh button to see the latest changes.

Where did my formatting go?

When you view the final page, if a block of text appears to run together and you don't see the formatting you applied, you may need to adjust the input format on the text box:

- Switch to plain text editor
- Input format

Click the tiny triangle next to Input format ▶ and a box expands:
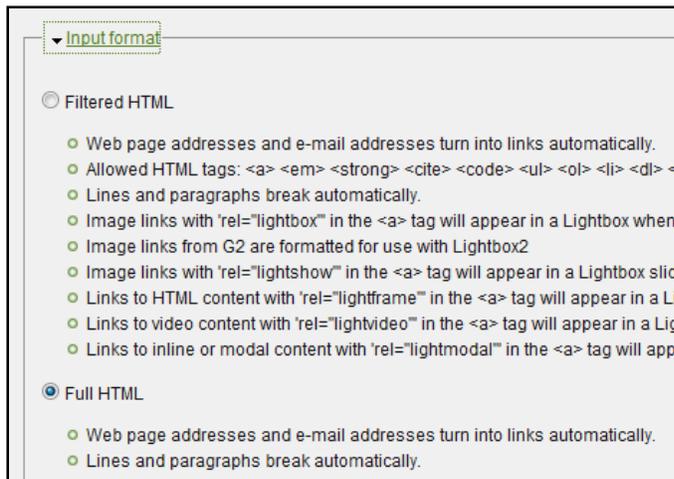
Make sure Full HTML and not Filtered HTML is selected, then save the page.

Two Known Issues with the Editor

Some Buttons Launch Popup Screens

Some of the buttons on the editing toolbar launch popup screens - (Paste from Word, Find, Image, Table, Link).

Internet Explorer can't cope with the popup screens. Without the popup, you can't use the button. So stick to Firefox, Chrome, or Safari for your website editing.

Be Patient with the Popups or You Could Crash the Browser

If the system is busy, response time may slow down. When you click one of the buttons that launch popup screens), the popup screen may not launch instantly; it may take a few seconds.

Please be patient and do not click the button a second time-- you may lockup your web browser and wind up losing your edits.

HTML is Not Word - Why Pasting from Word can be Problematic

HTML is Primitive

An important point to understand is that while Word can do very sophisticated formatting such as tabs and multi-column lists, HTML can't.

The editor comes with a special Paste from Word button:

...that helps smooth the formatting out so the webpage can understand it. Using the Paste from Word button will reduce the cleanup you have to do on pasted text.

Do Not Paste Your CV in an Edit Box

Please do not paste your CV into one of the edit boxes on the Current Faculty Profile screen. The formatting in a CV is too complex for the editor. Create an Adobe Acrobat PDF of your resume and send it to Dixie. She'll upload the file to the webserver and link it to the CV tab of your Current Faculty Profile.

If You Really Do Need to do Tabs or a Multi-Column List

In a pinch, you can use tables to mimic tabs or a multi-column lists. Contact Dixie for more information.

Spacing is Variable on the Web

Exact spacing is not possible with HTML. If you view the exact same page with the exact same HTML on different display devices (e.g. a monitor, a PDA, a tablet) the spacing will change. The spacing may also change between web browsers (e.g. Internet Explorer vs. Firefox), or within version of the same web browser. HTML is designed to allow text to reflow when the screen size or text size changes.

Uploading Files and Photos to Your Faculty Profile Webpage

If you'd like to include photos or linked files like PDFs, Word Docs, or PowerPoint files in your webpage, you will need to see one of these people:

- Dixie Lang
- Laurie Ballentine

They can upload the photo(s) or file(s) to the webserver, then give you the link to add to your webpage. Once photos are uploaded to the webserver, you can use the Image button on the toolbar to add them to your page.

Photo Guidelines

Keep these points in mind when choosing photos for your website:

- Photos for the Web should be 72 dpi (dots per inch), not 300 dpi or more (used for printing photos).
- Dixie can do some photo editing such as:
  - cropping
  - lightening dark photos
  - deepening colors

  The following items are beyond the services we offer:
    - rescuing blurry photos (use an appropriate lens for the distance to your subject)
    - darkening a photo that is too washed out (the photo lacks detail in the shadows)
    - removing backgrounds
- Portrait photos should be portrait (tall) not landscape (wide) and should be of the head and shoulders, not distance shots. The Summary page automatically shrinks your photo, and if the photo is a distance shot the face shrinks so small it's difficult to recognize. Keep the background simple, and watch out for items behind you that may appear to be "growing" out of your head.

Viewing Your Content

1. On My Menu, locate and click Edit my content. The Content List screen appears, showing the content you've created:

2. Click the Title of the content you want to edit. The content appears in View mode:
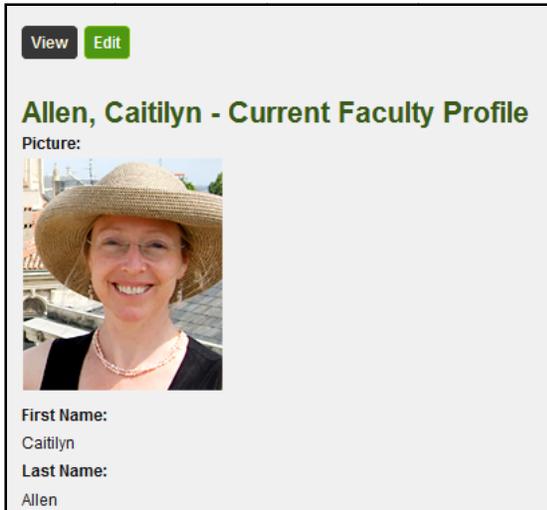
3. Click the Edit button. The content changes to Edit mode:

 You can tell you're in Edit mode when you see boxes, the editing toolbars, and a Save button at the bottom of the screen.

Sorting the Content List

To sort the content list, click the column label at the top of the column, e.g. to sort alphabetically by Title, click the Title link:

Title	Kind	Node Type	Status	Time	Language
Allen, Caitilyn - Current Faculty Profile		Current Faculty Profile	published	07/11/2011 - 12:52	Neutral

Editing your Faculty Profile

A Single Entry Screen Produces Two Webpages

The faculty profile has a single long entry screen:

The system takes this saved information and displays it on the Plant Pathology website in two different ways using templates:

The Faculty Summary page:

The Current Faculty Profile page (or Detail page):

 To learn more about how the information on the Current Profile screen splits out into the tabs on the page the website visitors view, see *Appendix B - Where the Current Faculty Profile Information Appears on the Plant Pathology Website*. This will help you learn to proof your Profile.

Step-by-Step

1. On My Menu, locate and click Edit my profile (Faculty Only). The Current Faculty Profile screen appears:

2. Make desired changes.

Two Title fields appear on the Current Faculty Profile entry screen:

- A UW Title screen, which appears after Last Name and before Phone:

Last Name:
Allen
Your last name as you would like to appear on website.

UW Title (e.g. Professor):
Professor and Chair

Phone:
(608) 262-9578

- A Title field between Office and Education:

Title: *
Allen, Caitilyn - Current Faculty Profile

The information entered in the UW Title field appears on the Faculty Summary screen and the Current Faculty Profile webpage.

The information entered in the Title field only appears inside Drupal on the Content List screen:

Title	Kind	Node Type	Status	Time	Language
Allen, Caitilyn - Current Faculty Profile		Current Faculty Profile	published	07/11/2011 - 12:52	Neutral

3. Click Save.

4. In another web browser window,* check your Current Faculty Profile.

- If your Profile looks as you wish, you're done.
- If you want to change your Profile further, go back to web browser screen with the edit screen and click the Edit button.

* See *Edit with Two Browser Windows Open*.

Why Not Use the Preview Button at the Bottom of the Screen?

The problem with the Preview button at the bottom of the Current Faculty Profile page is that it does not show the profile with tabs - you can only see the content properly placed in tabs by viewing the page the same way visitors see it - choose People..Faculty on the website menu, then click your name to go to your Current Faculty Profile page.

The "Latest" Box on the Homepage

The homepage page of the website contains a "Latest" box on the left side:
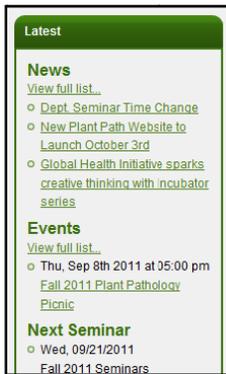
The "Latest" box displays:

- The last 5 News items created
- The last 3 Events created
- Any seminars scheduled for today

If the box contains 5 News items, the next News item entered will bump the oldest News item off the "Latest" list.

If the box contains 3 Events, the next Event entered will bump the oldest Event off the "Latest" lists.

Visitors can still see the older News items and Events in another location. To see the full list of:

- News items, click the "View full list…" link in the News section of the "Latest" box
- Events, click the "View full list…" link in the News section of the "Events" box
- Seminars, click Seminars on the menu. The seminars are listed by category - Fall 2011, Spring 2012, and Fridays @ 4

Faculty can create News items and Events. Faculty on the Seminars Committee can create and edit Seminars.

Only IT staff can delete News items, Events, and Seminars. If you create a News item or Event in error, please contact Dixie.

The entry screens for News items, Events, and the Current Faculty Profile have required fields. This means you must enter information in them in order to save the form. Required fields have a red asterisk after their label:

Please enter information in the correct fields. If you are unsure of where to enter information, contact Dixie. If you enter information in a field where it doesn't belong, e.g. enter an Event speaker name in the Event Title field to "stick something in there for now," problems can happen. The programming that drives the website depends on information being categorized correctly. The problems that result may appear on the homepage for all to see.

News Items

News items are items you would include in a print or email newsletter. Examples include short articles about alumni, current students, the department, faculty, staff, or job notices.

Creating a News Item

1. On My Menu, locate and click Create new content..News Items.

   The Create News Items screen appears:

2. Enter a Title for the news item. This title will appear in both the "Latest" box and the full list of news items.

3. In the News Type box, click to select a news type.

4. Click in the Enter Content Here box and enter the article text.

   If you use formatting in the Content box, make sure to click the Input format link below the box and change "Filtered HTML" to "Full HTML."

5. Click Save. The screen changes to show a preview of what the News Item will look like.

6. In another web browser window,* check the "Latest" box on homepage.

   - If the News Item looks as you wish, you're done.
   - If you want to change the News Item further, go back to web browser screen with the edit screen and click the Edit button.

   * See *Edit with Two Browser Windows Open*.

Editing a News Item

1. On My Menu, locate and click Edit my content. A list of all the content you have created appears.

2. Click the Title of the News Item you want to edit. The News Item appears in View mode.

3. Click the Edit button. The News Item changes to Edit mode.

4. Make desired changes.

5. Click Save.

6. In another web browser window,* check the "Latest" box on homepage.

    - If the News Item looks as you wish, you're done.
    - If you want to change the News Item further, go back to web browser screen with the edit screen and click the Edit button.

    * See *Edit with Two Browser Windows Open*.

Events

Events are tied to a time period. The time period can be an hour, several days, or several weeks.

Creating a New Event

1. On My Menu, locate and click Create new content..Event.

    The Create Event screen appears:

2. In the Title box, enter a description of the Event.

    Website visitors will *not* see this description; it is displayed inside Drupal on your content list.

3. In the Event Title box, enter the name of the Event. Remember the "Latest" box is not very wide, so long Titles will wrap, possibly on multiple lines.

4. Enter the date and time for the Event.

- You must enter both a begin date and an end date, but they can be the same date, if the Event is for a single day.
- You must enter a start time, but you do not have to enter an end time.

5. Enter the names of any Event speakers.

6. Enter the Event location.

7. Enter a description for the Event.

If you use formatting in the Content box, make sure to click the Input format link below the box and change "Filtered HTML" to "Full HTML."

8. Enter a "for more information" website for the Event.

9. Click Save. The screen changes to show a preview of what the Event will look like.

10. In another web browser window,* check the "Latest" box on homepage.

- If the Event looks as you wish, you're done.
- If you want to change the Event further, go back to web browser screen with the edit screen and click the Edit button.

* See *Edit with Two Browser Windows Open*.

Editing an Existing Event

1. On My Menu, locate and click Edit my content. A list of all the content you have created appears.

2. Click the Title of the Event you want to edit. The Event appears in View mode.

3. Click the Edit button. The News Item changes to Edit mode.

4. Make desired changes.

5. Click Save.

6. In another web browser window,* check the "Latest" box on homepage.

- If the Event looks as you wish, you're done.
- If you want to change the Event further, go back to web browser screen with the edit screen and click the Edit button.

* See *Edit with Two Browser Windows Open*.

Getting Help

Types of Help Available

Updates to the System/Tips

We will send information about updates to the system and tips by email.

Training

We will offer classroom training on how to use the system at the beginning of the semester.

If you would like personalized one-on-one training, please contact Dixie to set up an appointment.
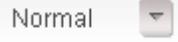
Answering Questions

You can send questions to webeditor@russell.wisc.edu.

The following staff can answer questions on the system:

- Dixie Lang, Russell Labs Web Developer
- Laurie Ballentine

Appendix A - Editor Toolbar Buttons

Button	Name	Description/Notes
	Cut	
	Copy	
	Paste	
	Paste from Word	Moving text from Word to the Web through copy and paste can be a headache. The text doesn't always come across the way you want it to. The Paste from Word is a "smarter" paste, and can smooth the transition of the text from Word to the Web.
	Check spelling	
	Undo	Undo the last action
	Redo	Reverse the last undo command
	Find	Search for text
	Replace	Search for text and replace it with other text
	Image	Insert a link to a photo already uploaded to the webserver
	Table	Insert a table
	Horizontal rule	Insert a gray horizontal rule
	Symbol	Insert a symbol
	Bold	Bold selected text
	Italics	Italicize selected text. Keep in mind italicized text can be hard to read on a webpage, particularly on mobile devices.
	Underline	Please use this sparingly, if at all. When visitors see underlined text on a webpage, they think it's a link and click the text. When nothing happens, they get frustrated and may leave the site.
	Subscript	
	Superscript	
	Numbered list	
	Bulleted list	
	Decrease indent	
	Increase indent	
	Insert block quote	
	Align left	
	Align center	
	Align right	
	Justify	Why no button for justify? Don't try to justify text on the web. The web was designed from the ground up to reflow text, partly for people with

Button	Name	Description/Notes
		vision problems. Justification does not work properly and will leave odd "rivers" of white running through your text.
	Link	Add a link to a file, a webpage, or an email address.
	Unlink	Break an existing link.
	Anchor	Adds an anchor - a named point on the page. Once you have an anchor, you can create a link above it that goes to the anchor on that page. This is how the "back to top" links work on long webpages.
Normal	Paragraph style	
Size	Font size	
	Text color	Please use this sparingly if at all. We carefully designed the colors of the website. Further, some colors have cultural connotations you may not be aware of. The Plant Path website is available globally.
	Background color	Please use this sparingly if at all. Too much background color can cause some visitors to long for sunglasses as the view the site.

Appendix B - Where the Current Faculty Profile Information Appears on the Plant Pathology Website

Field Name	Location on the Current Faculty Profile Page the Visitors See	Does this Info Appear on the Faculty Summary Page the Visitors See?
Photo	Header above tabs	Yes
Name	Header above tabs	Yes
UW Title	Header above tabs	Yes
Phone	Header above tabs	Yes
Fax	Header above tabs	No
Email	Header above tabs	Yes
Websites	Header above tabs	No
Office	Header above tabs	No
Title	Does not appear - this only appears inside Drupal - it's used on the content screen as a description of the page.	Does not appear - this only appears inside Drupal - it's used on the content screen as a description of the page.
Education	Profile Tab	No
Link to CV	Profile Tab	No
Expertise for Summary Field	Does not appear	Yes
Research Interests	Research Tab	No
Courses Taught	Courses Taught tab	No
Awards	Profile Tab	No
Affiliations	Profile Tab	No
Publications	Publications Tab	No
Books Edited	Publications Tab	No

A Title field also appears on the Current Faculty Profile entry screen between Office and Education:

Title: *
Allen, Caitilyn - Current Faculty Profile

The information in this field is used only inside Drupal; it appears on your content screen as the title of the information.