PSC Website CMS

User guide

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Preface

In this manual we will give an overview of the main features of the Hippo CMS version 6 delivered with the Toolbox PSC. This manual should provide enough information for the reader to be able to perform all the operations needed to manage the content to be displayed in the website.

Table of contents

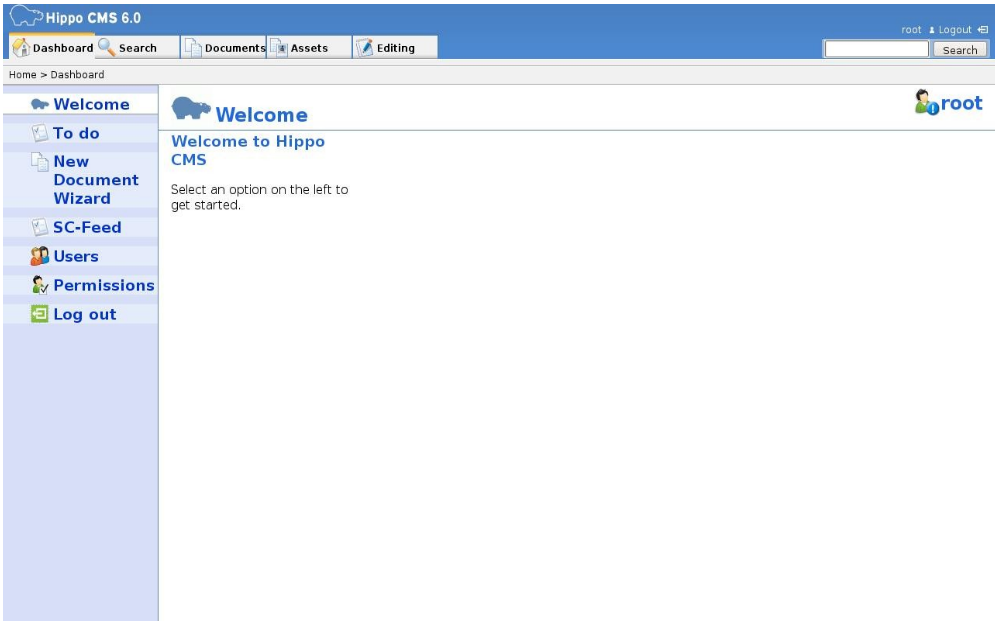
1 Introduction

In this first chapter we will give a first overview of the Hippo CMS so that the user will be able to find his away among the tabs and the different screens.

1.1 The dashboard

After going to the CMS URL you will be requested to log in filling in the following form.

After filling in user name, password and choosing your favourite language among the 6 available, you will find yourself in the following page, called 'Dashboard'

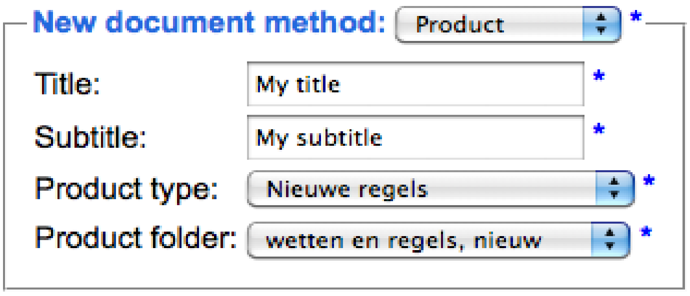


1.1.1 New Document Wizard

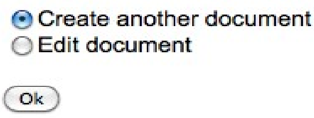
The new document wizard is an easy and powerful way of helping users create new documents, reducing both the amount of clicks needed and the risk of human error.

To use the wizard a user first has to choose the type of document he/she wishes to add.

Let's say we chose to add a new Product document. A form will appear asking the user for the title and subtitle of the document, as well as the product-type and the product-folder.



After the user has filled in the form, a last choice has to be made; do we want to start editing right away, or should we create some more documents first.



Pressing 'ok' will create the correct folder structure if it is not present, create the document, and, depending on the user's choice, open the document editor, or reinstate the new document wizard.

1.1.2 CC Feed

This section allows the user to monitor the Cooperating Catalogues (CC) products and link them to CMS products so that they can be found via a local search in the website. In this section it is also possible to execute the import of the CC products from the feeds contained in the list.

The CC feed section is composed of three pages:

CC feed import overview:
this page gives the user an overview of the provinces and municipalities which are in the list of the of available URLs (in the grietje). If a URL has already been imported it will be possible to browse its CC products.

CC synonyms tool:
in this page it is possible to execute search among the CC products already imported in the CMS with the possibility of refining it via the setting of different criteria. Once a CC product is found, it can be coupled with a product in the CMS, so that it will be retrievable via a local search.

Manual importer:
this page allows the user to import the CC product from the source URLs contained in the grietje list. These URLs are supposed to contain an XML in a certain well defined format; the XML will be passed and the products will be inserted in the CMS. Once they are there it will be possible to match them via the CC synonyms tool to make them available in the website via local searches.

How to couple products of the PSC website to the products of a competent authorities

Please note:
From the viewpoint of usability the user would like to see all the entrepreneur's non-coupled products (because this is the PSC's target audience).
It is important to know that the system sees all products as coupled. This concerns the internal linking of the system.

To actually link a product (a product which is made with the template: product, in the CSM) to a competent authority's product, carry out the following steps:

1. Click on the 'CC Synonyms tool' tab
2. Set 'target audience' to the value 'both'
3. Set ' status' to 'all'
4. Click on 'search'

When the search results appear, carry out the following:
1. Click on the plus symbol for the text ' Show product'
2. The product then folds open
3. Users can see whether the product is coupled yet or not on the line ' Coupled PSC products'
   - If it is already coupled, the text: 'entrepreneur' will be displayed
   - If it is not coupled is will say ' unknown product'
4. Then, the user can either couple it to another product, on the basis of the content, or ignore it.

In order to link it, carry out the following:
1. Click on the ' couple' button

The page refreshes. A list will appear on the same page where the user can choose what to couple this product to (e.g. parking permit)
1. Choose 1 from the list and click on 'save'
2. Select several from the list (by holding the CTRL-key) and then click on 'save'
3. If you want to uncouple it, click on the 'remove' link which can be found behind the name of the coupling.

Please note:
The moment you click on 'save', the system will unfortunately not remember your search. In order to get to the same results, you will unfortunately have to carry out the search again.

If you have made a mistake and do not want to carry out the coupling after all, click on one of the tabs and then go back. In this case you will unfortunately also lose the search and you will have to carry it out again.

Do the following to ignore a product:

1. Click on the ' ignore' button

The system will then give a pop-up with the question (and the request to confirm) whether the user is sure he wants to ignore the product concerned.

2. Then click on ' yes'
3. The product is ignored

If you want to run through the ignored products after all in order to check whether they have not been ignored unintentionally, set the status in your search to 'ignored (ignore product) and run through the list again, as described in the steps above.

1.1.3 Users and user groups

In Hippo CMS we distinguish individual user accounts and user groups.
A user group is no more than a collection of individual users. We recommend to set permissions on groups of users rather than individual users, as this will be a lot easier to maintain once new users have to be added or old ones have to be removed; the administrator will only have to add the user to the correct group and all permissions will automatically propagate to the new user.

The Hippo CMS distinguishes three main levels of user roles:

- **Author** (writers of texts who don't have publishing rights)
- **Editor** (the editors who do have publishing rights)
- **Administrator** (a super-user with permissions to create and edit users, user groups and settings permissions on folders)

Permission can be set on:

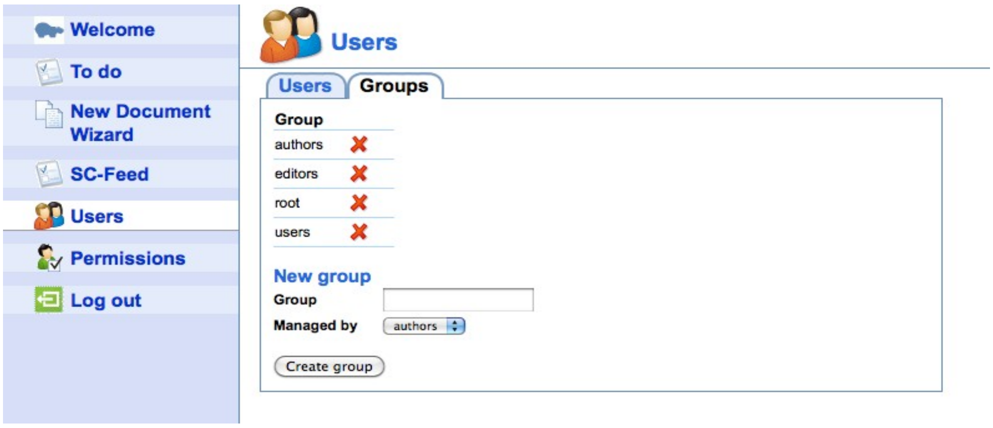
- Document folders
- Binary or assets folders
- Dashboard views

TIPS

As a best practice it is advised that the structure of the user groups and their permissions is thought through before anything is added into the CMS. Once a decent user-groups structure is in place, users can be added to the groups.

Create a new user group

– Navigate to the groups management tab.

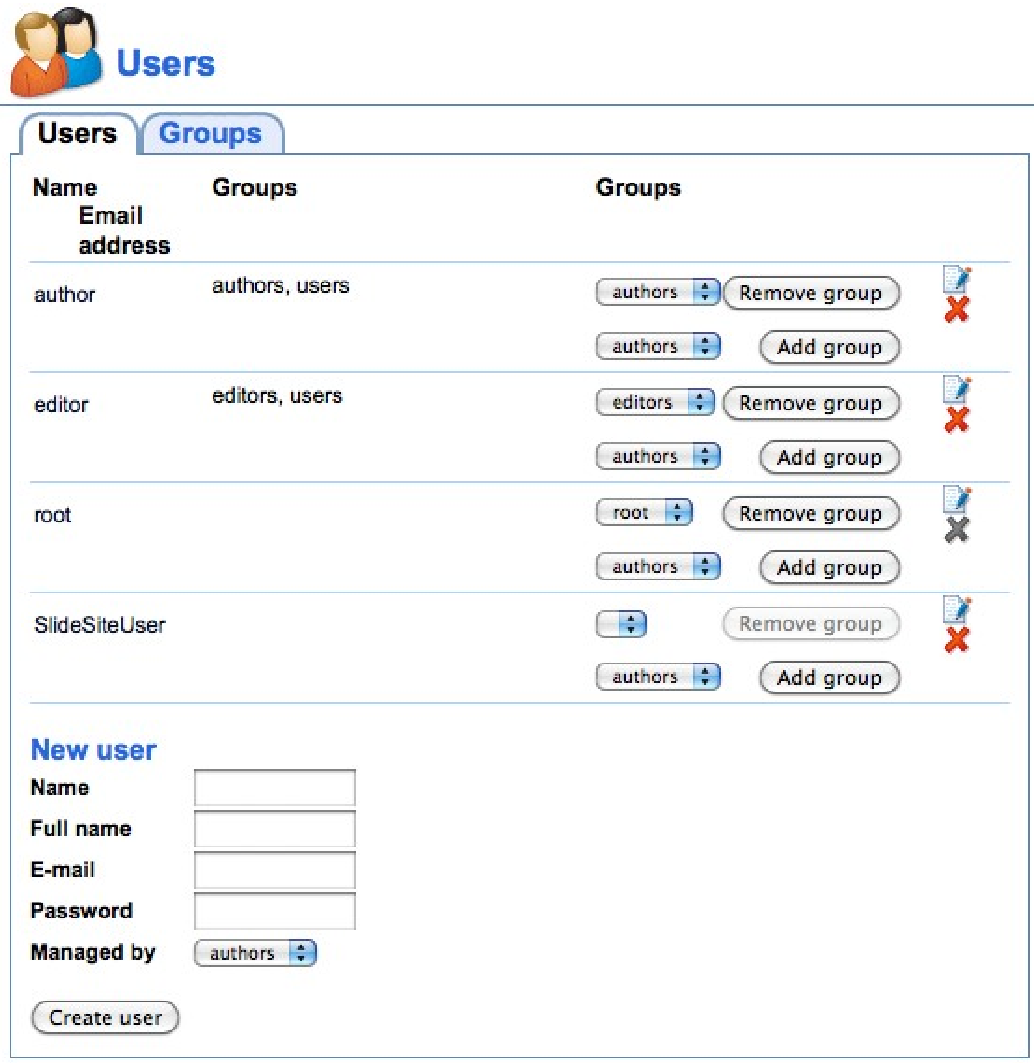


– Then fill in the new group name and select the group that has the rights to set the permissions for the new group, usually the administrator group.
– Pressing 'create group' will immediately add the new user group to the system.

Groups can be removed by pressing the red 'X'.
Please note:
This is only possible when the corresponding group has no more permissions set on the system.

Create a new user

– Navigate to the users management tab.



– Fill in the 'New user' form (Name and password is enough)
– And select a user group that has the right to manage the permissions for this user
– Press 'create user'

The new user is immediately added to the list and by default added to the user group 'users'. The user groups 'users' is a default group that should always be present (the system will automatically create it if it is not present)

– Now we should add the new user to a user group we created. To do so select on from the drop down and press 'add group'.

1.1.4 Permissions

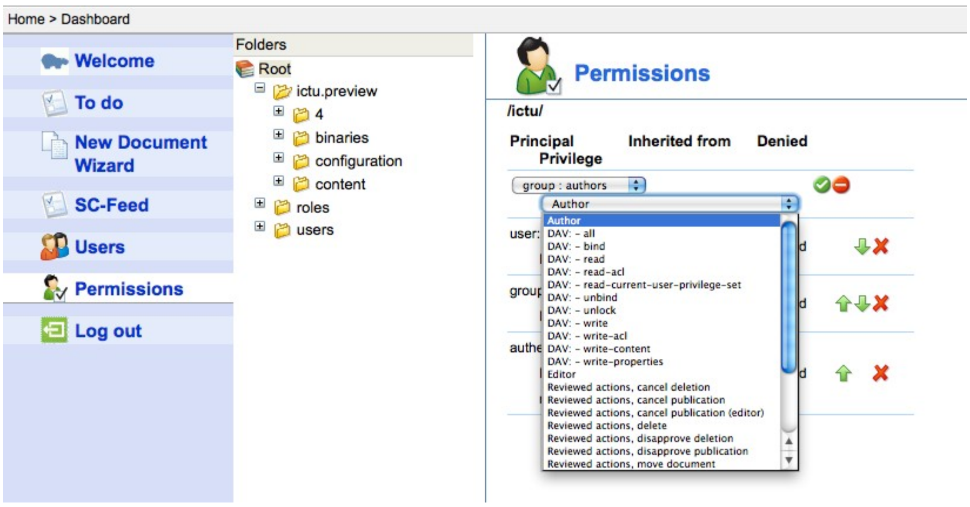
The permissions on the Hippo Repository are set by using Slide's ACL (Access Control Lists)[1] implementation. Every ACL contains a list of ACE's (Access Control Element) which either grants or denies a particular set of privileges (like read, write, publish, etc.) for a particular user or group.

For example, the user is trying to access folder /foo/bar.

1. First the system will look at each ACE on resource /foo/bar **in order.** The order of evaluation is: direct permissions on the resource (in their explicit ordering within the ACL), then inherited permissions from the parent, then inherited permissions from the grandparent, etc.
2. If this permission allows you to perform the appropriate action, then the access control checks pass. Don't look at the rest of the ACEs
3. If this permission **denies** the appropriate permission, the access control check fails. Don't look at the rest of the ACEs.
4. If this permission does neither, continue to the next ACE until all ACEs are evaluated.

When the Hippo Repository is initialized, it will contain all default WebDav ACEs (read, write, all, etc.) plus a number of ACEs that belong to the editor and author groups ('request for publication', 'deny publication', 'publish', etc.).

These ACLs can be managed in the Hippo CMS by using the Permissions tab on the Dashboard.



For example, we want to give our new group 'editors' permissions to publish all documents in the /foo/bar folder
– First we select folder /foo/bar (the ACL of this folder will be displayed)
– Then you select the group for which you want to add an ACE, in this case 'editors'
– Then we select the ACE 'Editor' (which contains all ACEs belonging to an editor)

[1] http://webdav.org/specs/rfc3744.html

– And finally, we press the green button for a grant and the red button for a deny.

1.1.5 Log Out

The Log Out does not have any page associated and will simply invalidate the session.

2 Search

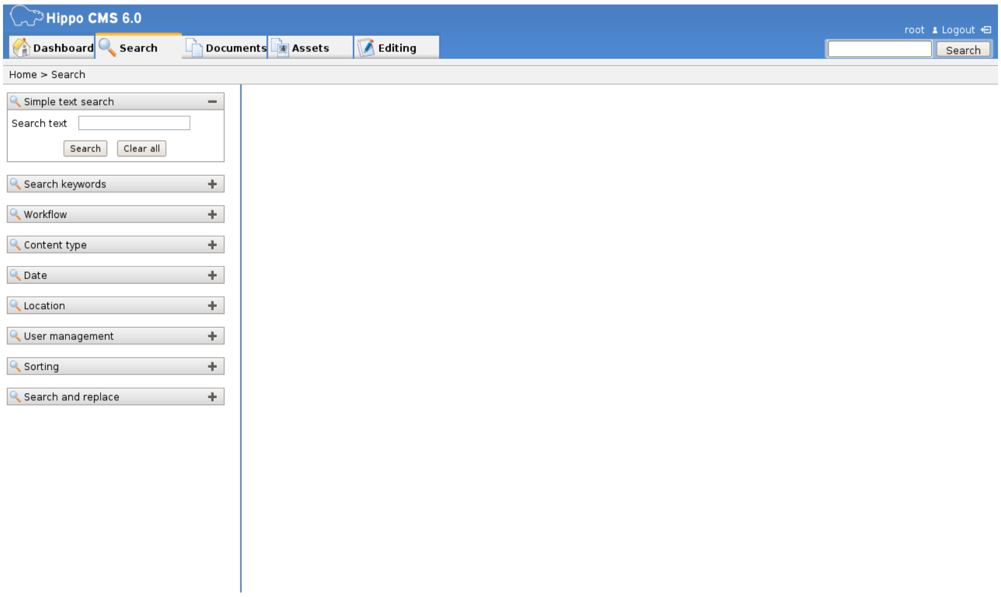
The search section permits the user to retrieve from the repository a list of documents satisfying the requirements set by the user himself.

2.1 Overview

The search page is composed by two elements:

1. On the left you will find a list of expandable divs where the user can specify the search criteria.
2. In the main panel you will find the list of the documents retrieved with the last search performed

When going to the search page for the first time the page will result as in the screenshot displayed below:

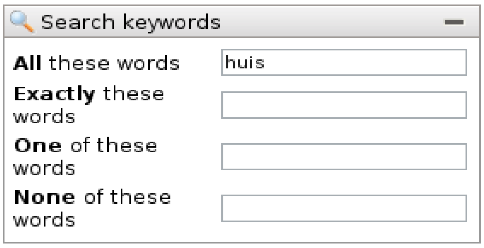


In the beginning only the Simple Text Search is open and it appears as in the image here below. We would like to stress the fact that you can only find the buttons 'search' and 'clear all' in this div. This might appear misleading because it could give the user the impression that those actions are performed with a scope limited to that div, but that is not the case. When performing the search all the criteria specified in all the divs will be considered, even though the button is located in the first div.

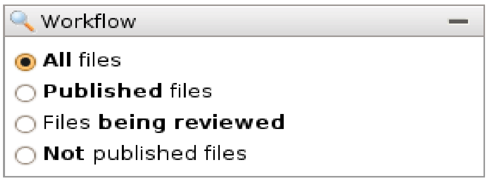
The whole list of divs is the following:

- **Simple text search**: simply search for the specified text in the documents in the repository.

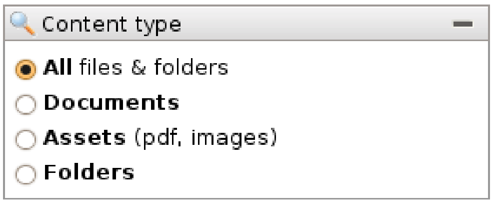
- **Search keywords**: provides some more advanced feature for the research of text in the documents.



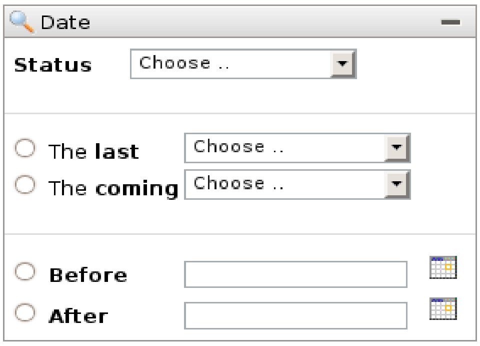
- **Workflow**: performs the selection based on the status of the documents related to the workflow



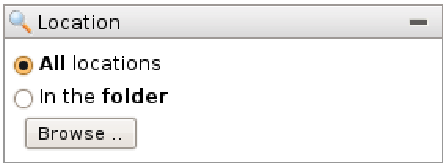
- **Content type**: allows a restriction on the search for documents, binary files, folders or a combination of all of these types



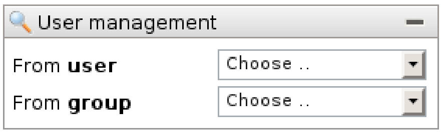
- **Date**: allows you to only select the documents that are modified, created, published or reviewed in a certain time period



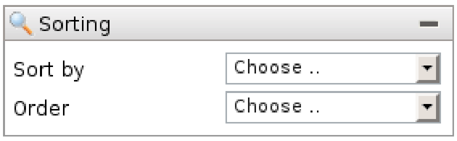
- **Location**: allows you to decide whether to perform the search in the whole repository or limit it to only a folder



- **User management**: allows a user to search for documents on the basis of user and /or group

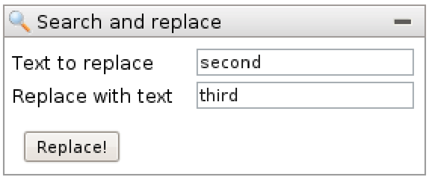


After the divs for the search criteria we have one link for the ordering of the results. This permits you to choose whether to order the retrieved documents in ascending or descending order and what parameter to use for the order: Date, caption or document type

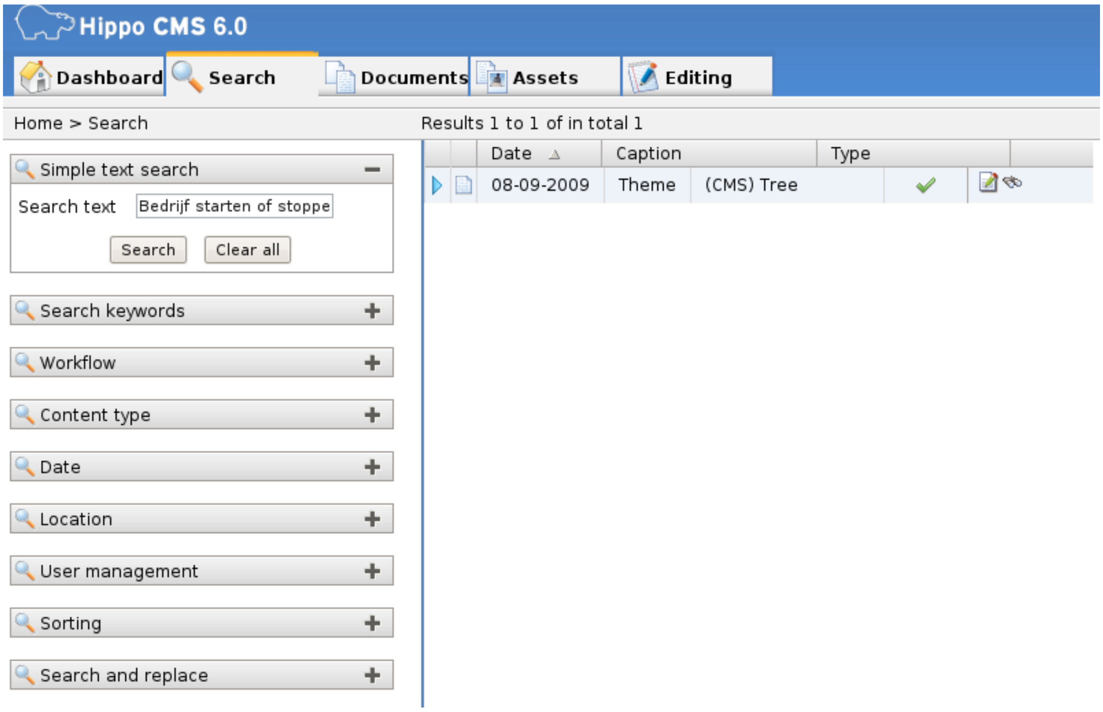


The last div on the left is not to be used to perform a search, but to perform a string replacement in all the documents at the moment present in the central section:

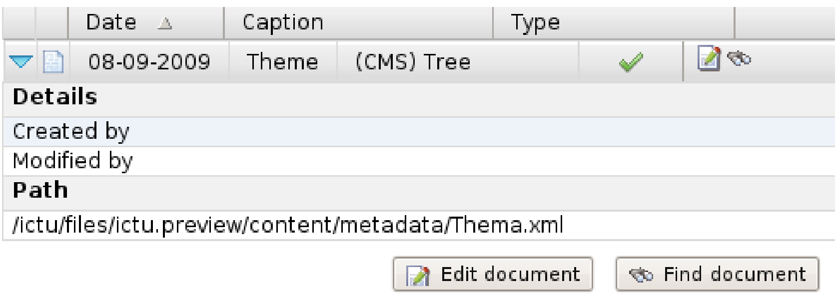
2.1.1



When performing a search, if some results are returned, these will be shown in the main section of the page. In the screen shot below you can see the result of a search which returned only one document



When you click on one of the retrieved documents some more information will be displayed. Besides that two buttons will be available:



– **Edit Document**: clicking on this button will take you to the Editing tab of the CMS and you will find yourself in a page where you can modify the content of the document itself

– **Find Document**: clicking on this button will take you to the Documents tab of the CMS and automatically position you in the folder containing the document.

3 The Documents Section

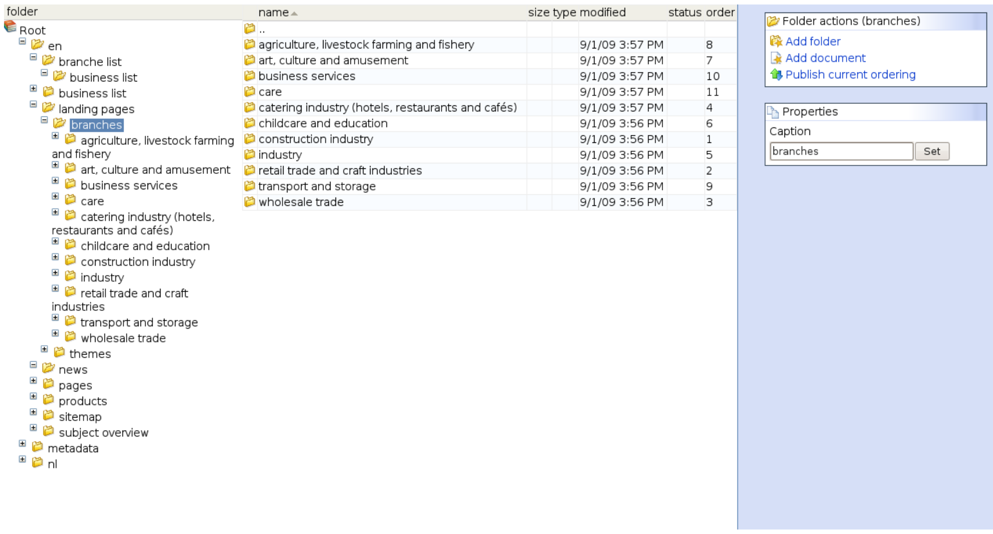
The documents section is probably the most important section of the CMS. It permits the user to perform all the operations necessary for the handling of the documents.

3.1 Overview

When going to the documents section the page will be composed by three panels:

1. On the left you will find the tree representing the folder structure of the repository.
2. In the centre you will find the list of documents and sub folders contained in the folder currently selected.
3. On the right you will find a list of the actions which can be performed on the selected item

We would like to stress the fact that what you see in the CMS always refers to the preview of the site. The contents will be passed to the live site when published, but in the CMS the contents are always the ones in preview.



3.1.1 Left section

The left section reflects the structure of the repository and allows you to navigate through the folders and the documents. There is not much to say about this section.

3.1.2 Central section

In the central section you will find the list of folders and documents contained in the folder currently selected in the left section. As for the folders there is not much to be said. As for the documents.

name	size	type	modified	status	order
..					
Details			9/4/09 4:53 PM		7
agriculture and horticulture	1.5 kb	Text page	5/7/09 4:07 PM	✓	3
agriculture, livestock farming and fishery	1.5 kb	Text page	5/7/09 3:37 PM	✓	1
fisheries	1.4 kb	Text page	5/7/09 4:09 PM	✓	6
habitat management	1.4 kb	Text page	5/7/09 4:14 PM	✓	4
livestock farming	1.4 kb	Text page	5/7/09 4:16 PM	✓	5
silviculture	1.4 kb	Text page	5/7/09 4:18 PM	✓	2

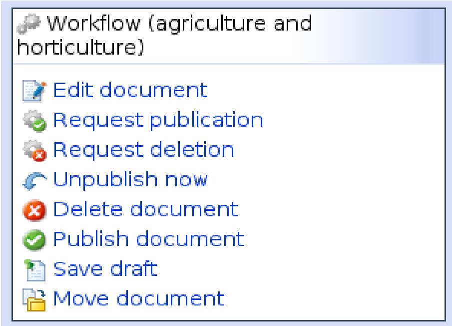
3.1.3 Right section

The right section simply displays the possible actions for the element currently selected in the central section.
When a folder is selected there are not many possible actions; in this case the user can only perform one of the following:

- add a folder
- add a document
- publish the current ordering to the live website
- change the caption of the folder

When selecting a document we have the same possible actions still available for the folder containing the document, and in addition we have many more actions concerning the document itself:

- edit document
- request publication
- request deletion
- unpublish
- delete document
- publish document
- save draft
- move document



Most of the results of these actions will probably be quite clear to the user at first glance, but a couple of words should perhaps be spent on the “Edit document” feature.
Once you selected a document and you clicked on the Edit document menu element the CMS will switch and go to the Editing tab. The CMS will recognize the template related to the document type of that particular document and present the contents of the document to video.

4 Assets

The Assets section is similar to the Documents section, but is aimed at the attachments management.

4.1 Overview

This page, as the Documents page, is divided in three sections

4.1.1 Left section

The left section reflects the structure of the repository and allows you to navigate through the folders.

4.1.2 Central section

In the central section we can find the list of the contents of the folder we selected on the left. On the same line of every item we can find the size, the type, the modification date and the order.

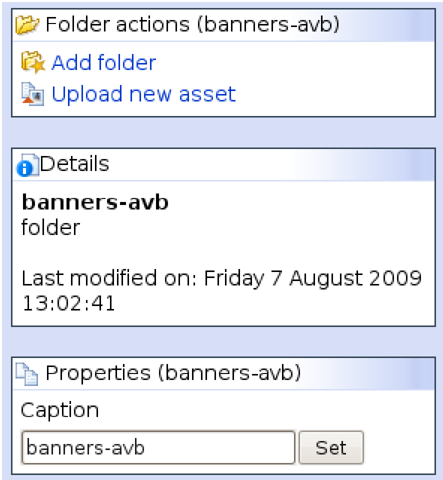
name	size	type	modified	order
..				
200---70-vragen-aan-de-overheid.gif	2.5 kb		9/14/09 11:11 AM	2
Logo Antwoord voor bedrijven (200x70)	2.3 kb		9/14/09 11:11 AM	1

4.1.3 Right section

The right section displays some information about the item currently selected in the central section and the actions that can be performed on the item itself. These are of course different when you selected a folder or when you selected a real file.

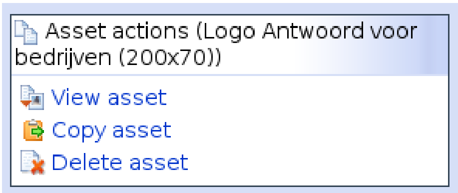
In case of the folder only three actions are possible:

- add a new folder
- upload a new asset
- change the caption



When a real file is selected we still have the folder actions available and in case an action is performed this will be applied to the folder containing the item. Besides those we have three more:

- View asset
- Copy asset
- Delete asset

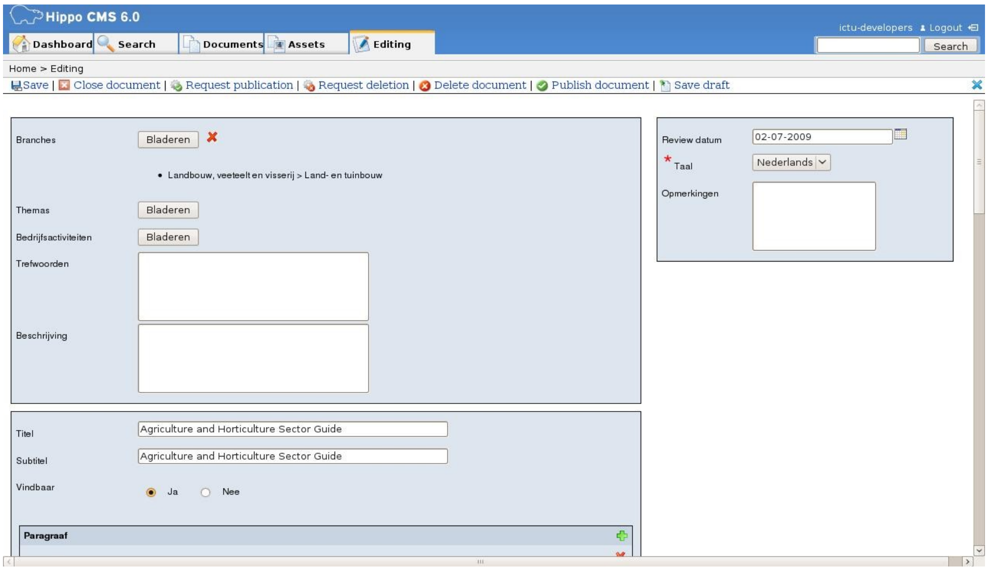


5 Editing

This section allows you to modify the contents of documents that already exist in the repository.

5.1 Overview

The Editing section is composed by only one panel where it is possible to edit the contents of a selected document.

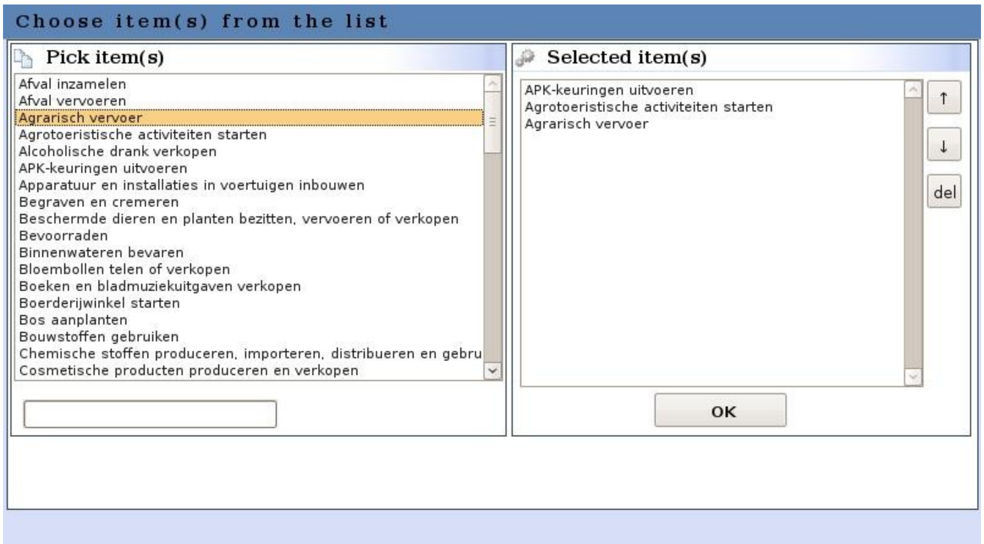


If the structure of the document is complex the page might contain many fields and to reach the last ones you will have to use the scrolling bar on the right of your browser.

Please note:
Just below the tabs there is a toolbar which presents most of the possible actions in the Documents section when the document is selected. All of these actions are therefore available when browsing the repository and it is not necessary to enter the document itself to execute them.

This page was created with a sole aim of modifying the content of the document. After doing that always remember to save it, otherwise all the changes will be lost

The html elements used to enter the information will depend on the structure of the document type you are considering. For strings we will have text fields to fill in, for booleans we will have radio buttons and for more complex information containing references to meta data we will make use of customized pickers.
These pickers contain two columns. The one on the left contains a list of possible values populated from meta data contained in the repository. The one on the right contains the items selected by the user.


Choose item(s) from the list
Pick item(s)
Afval inzamelen
Afval vervoeren
Agrarisch vervoer
Agrotoeristische activiteiten starten
Alcoholische drank verkopen
APK-keuringen uitvoeren
Apparatuur en installaties in voertuigen inbouwen
Begraven en cremeren
Beschermde dieren en planten bezitten, vervoeren of verkopen
Bevoorraden
Binnenwateren bevaren
Bloembollen telen of verkopen
Boeken en bladmuziekuitgaven verkopen
Boerderijwinkel starten
Bos aanplanten
Bouwstoffen gebruiken
Chemische stoffen produceren, importeren, distribueren en gebru
Cosmetische producten produceren en verkopen
Selected item(s)
APK-keuringen uitvoeren
Agrotoeristische activiteiten starten
Agrarisch vervoer
del
OK

6 Meta data

This regards the files that are present in the CMS in the metadata folder; it is important for the user to know what they are used for. These are essential for the website to run correctly; if they are not present certain functionalities of the website will not be available.

6.1 The files

The following meta data files, should always be present in the CMS, for a correct functioning of the website. These are:

- **Branch** *(Branche.xml[1])*:
  the tree of the possible branches. Products and landing pages can have branches associated; these are picked up from this metadata file;
- **Theme** *(Thema.xml)*:
  the tree of possible subjects. Products and landing pages can have themes associated; these are picked up from this metadata file;
- **BranchActivities** *(Bedrijfsactiviteit.xml)*:
  as said for the branches and subjects, products and landing pages can have branchactiviteites associated; these are picked up from this metadata file;
- **CompanySize** *(BedrijfsGrootte.xml)*:
  the list of descriptions of possible company sizes sizes. This is one of the fields which can be filled in when defining a new product. If the considered product is a subsidy it will also be possible to research it defining the company size of interest;
- **Countries** *(Landen.xml)* and **CountriesActivities** *(ActiviteitenLanden.xml)*:
  contains a tree of countries divided in zones. When defining a product it is possible to define in what countries it was established and in what countries it has activities. These fields contain multiple values and, if populated, it is possible to use the related fields when refining a search in the website.
- **Language** *(Taal.xml)*:
  the list of possible languages which can be associated with a product or a text page.
- **Postal code** *(Postcode.xml)* and **Postal code light** *(PostcodeLight.xml)*:
  these two files contain the mapping between postal codes and location names.
- **PerformingOrganisation** *(UitvoerendeOrganisatie.xml)*:
  the list of organisations that can be linked to a product.
- **Producttype** *(Producttype.xml)*:
  the list of product types. When creating a new product, the user will be asked to choose from a combo box which contains this list.

- **Scheme** *(TypeRegeling.xml)*:
  the list of schemes that can be linked to a product.
- **Status** *(Status.xml)*:
  the list of status that can be linked to a product.
- **Messages** *(messages.xml)* and **messages_en** *(messages_en.xml)*:

[1] The name of the file, as it is in the repository

these files contains the list of the translations for the labels used in the website. In case some labels need to be changed in the front end, this is where the administrators of the website should perform the changes.

Please note:

Do not change the name of the file (the one between parentheses) if so, you need to change it through the entire code, in order for it to keep working.

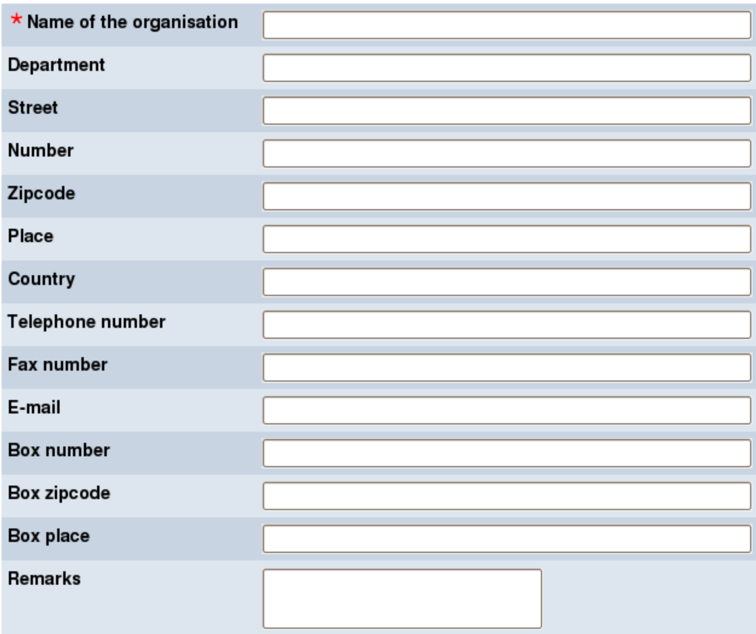
7 Templates

In this chapter the templates that are part of the CMS will be discussed. Here an explanation will be given on how to use it, and what certain fields are for.

If you want to know how to create your own template. Please read the information in the Developers Guide.

7.1 Template: Organisation

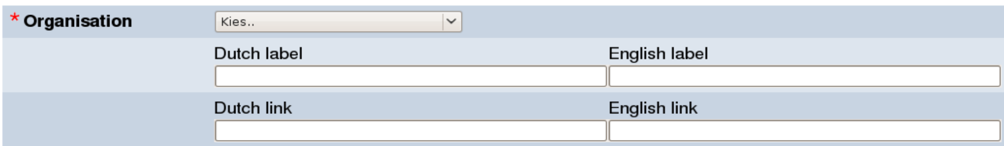
The Organisation template is used to create a new Organisation entity, which can be used later on to define some related links using the Web Address template. When creating a new organisation you will have to fill in the following form.
Please note:
Only the name field is mandatory, all other fields are optional.



* Name of the organisation	
Department	
Street	
Number	
Zipcode	
Place	
Country	
Telephone number	
Fax number	
E-mail	
Box number	
Box zipcode	
Box place	
Remarks	

7.2 Template: Web Address

The Web Address template has to be used to define external links to some organisation previously defined with the Organisation template.



* Organisation	Kies..	
	Dutch label	English label
	Dutch link	English link

When creating a new web address object you will have to choose the organisation from the ones you already defined. Then you will have to define links and labels for the two languages used in the website.

Once defined, the web address objects can be used in the products objects to compose the external links lists.

7.3 Template: Product

The product template is one of the main templates of the site. The whole website is mainly aimed at the search and display of products, therefore the correct use of this template is fundamental in order to provide users with data so they can browse efficiently.

When you define a new product it is necessary to specify a product type and to provide a title and at least one paragraph with the description of the product itself. This does not need much explanation.

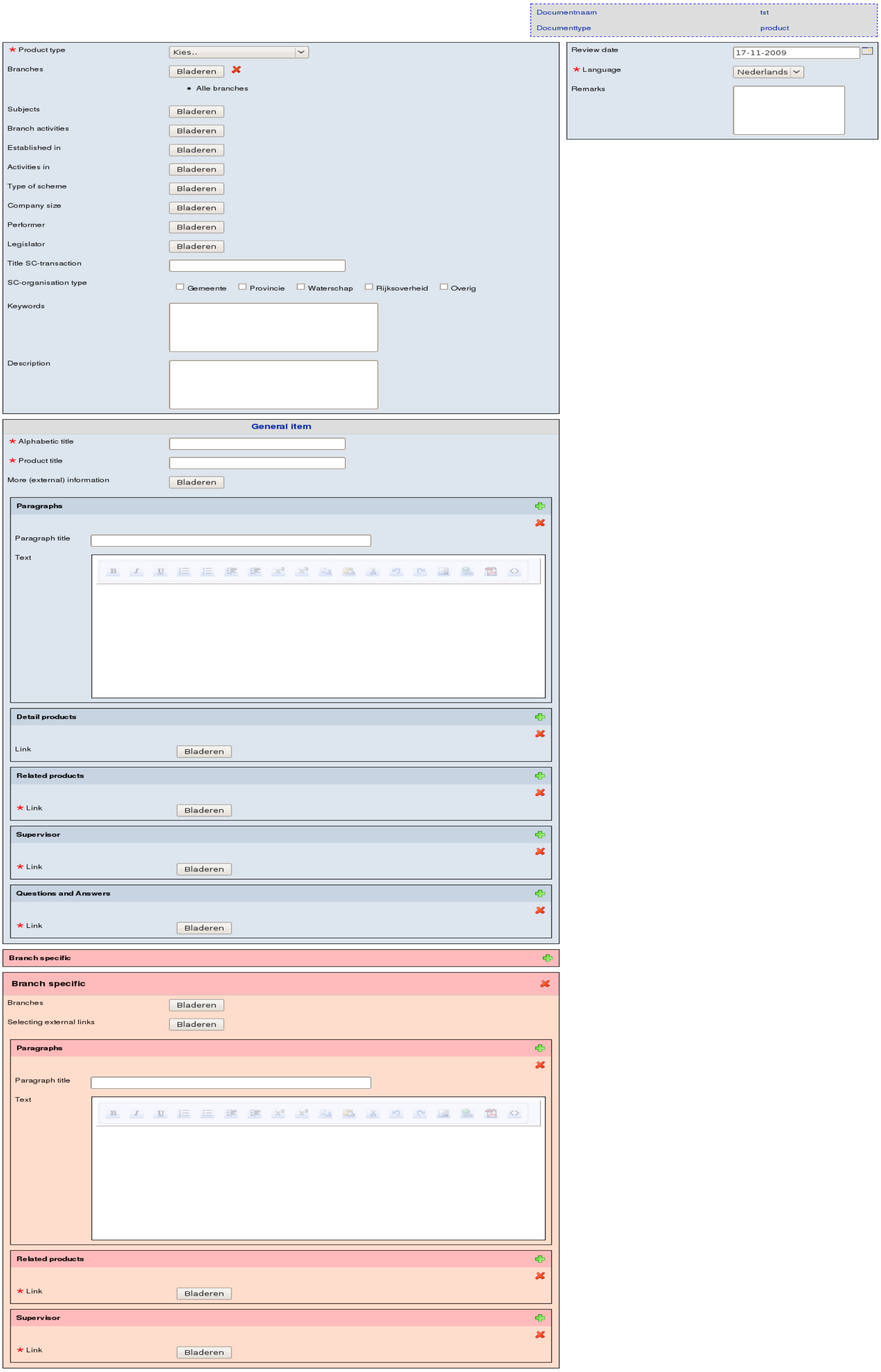
Maybe it is useful to pay some more attention to the metadata associated with the document itself. If no metadata is associated with the document, it would be very difficult for the website user to retrieve it when browsing the website. It is fundamental to associate some subjects and/or some branches with the documents, otherwise it will not be possible to reach it in the website when browsing these categories. The branch activities are also beneficial in order to give the user short cuts to reach the product in the website.

Besides the subjects, branches and branches activities, some more information can be associated with the product so that it is easier to retrieve it when performing a search in the website. When defining a new product, it is possible to fill in the following metadata:

- Established in
- Activities in
- Type of scheme
- Company size
- Performer
- Legislator

Defining the fields above helps you to characterize the product with a higher level of detail and it makes it easier to retrieve it via the search features in the website.

In the product template we will also find a text input called Title CC-transaction and some check boxes to define the CC organisation type. This information is to be used in combination with the CC import tool when connecting some CC products to the product itself.


Documentnaam
tst
Documenttype
product
Product type
Kies..
Branches
Bladeren
Alle branches
Subjects
Branch activities
Established in
Activities in
Type of scheme
Company size
Performer
Legislator
Title SC-transaction
SC-organisation type
Gemeente
Provincie
Waterschap
Rijksoverheid
Overig
Keywords
Description
Review date
17-11-2009
Language
Nederlands
Remarks
General item
Alphabetic title
Product title
More (external) information
Paragraphs
Paragraph title
Text
Detail products
Link
Related products
Supervisor
Questions and Answers
Branch specific
Selecting external links

7.4 Template: Text page

The text page template is one of the most important templates and it is used for a number of different pages to provide the content to display.

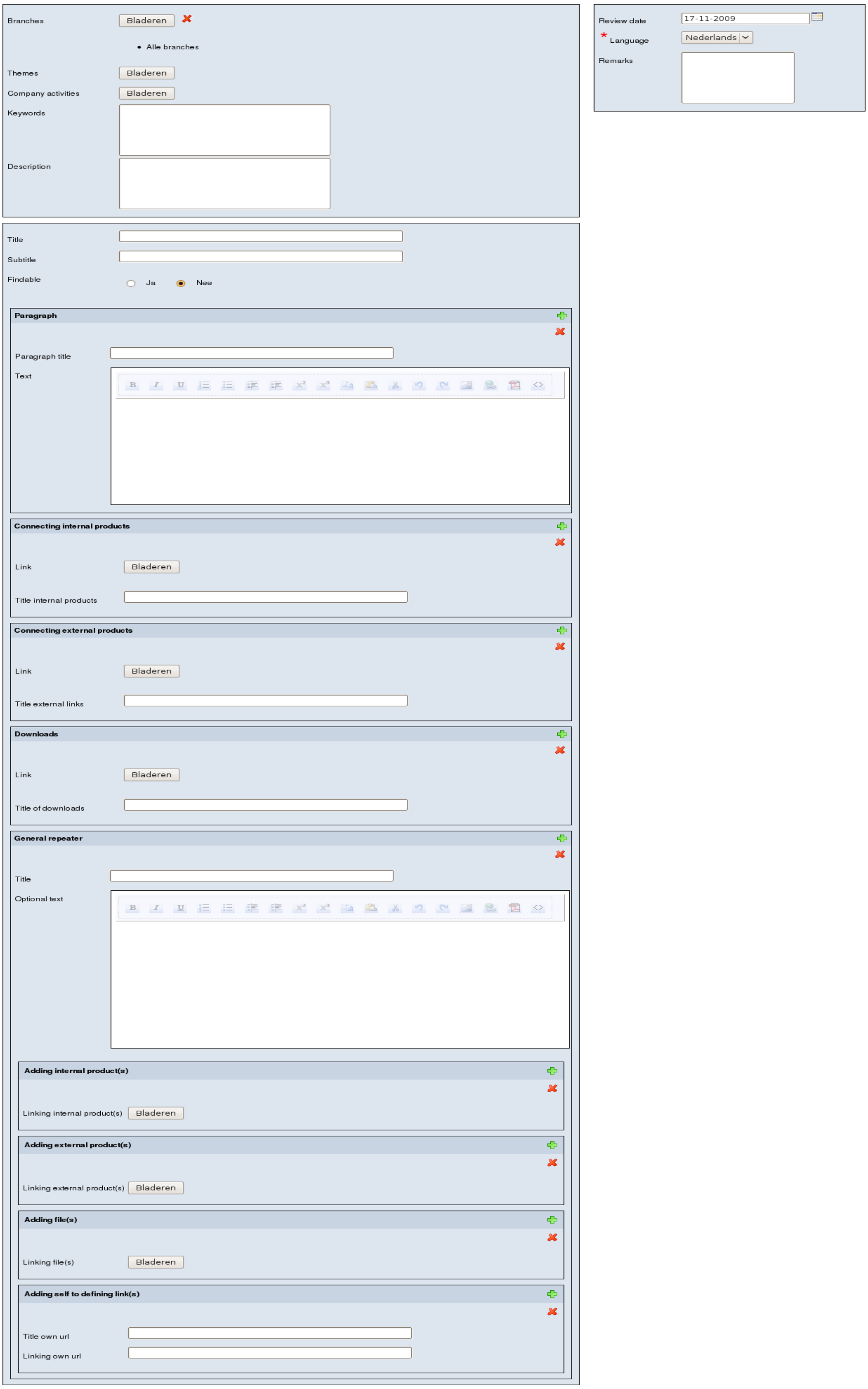
As in the product template we have the subjects, branches and company activities. This metadata is to be used when the text page is to be used as a landing page for a certain category. In this case pay attention to save the text page in landingpages folder. The website expects to find them in that folder, otherwise it will not be able to retrieve them. Landing pages are contents to be displayed when selecting a certain combination of branches and subjects.

Besides for the landing pages, the text pages are used also to populate the homepage, the about page, the service pages, the sectors overview page and the subjects overview page.

When creating a new text page you will have to fill in the title and the subtitle and this does not need much explanation. After you will be asked to make it 'findable' or not choosing from a radio button; only findable pages can be retrieved when searching for contents in the website.

As for the products template, it is possible to fill in one or more paragraphs with the contents the user wants to display. In addition to that it is possible to define three lists of different links:

- **Internal products**: these are links pointing to products defined in the CMS, therefore pointing internally to a page of the website.
- **External products**: links pointing to some URL outside of the website. These must be defined in the CMS via the Web Address template and can be selected via a picker.
- **Downloads**: links pointing to binary files loaded in the CMS in the Asset section.

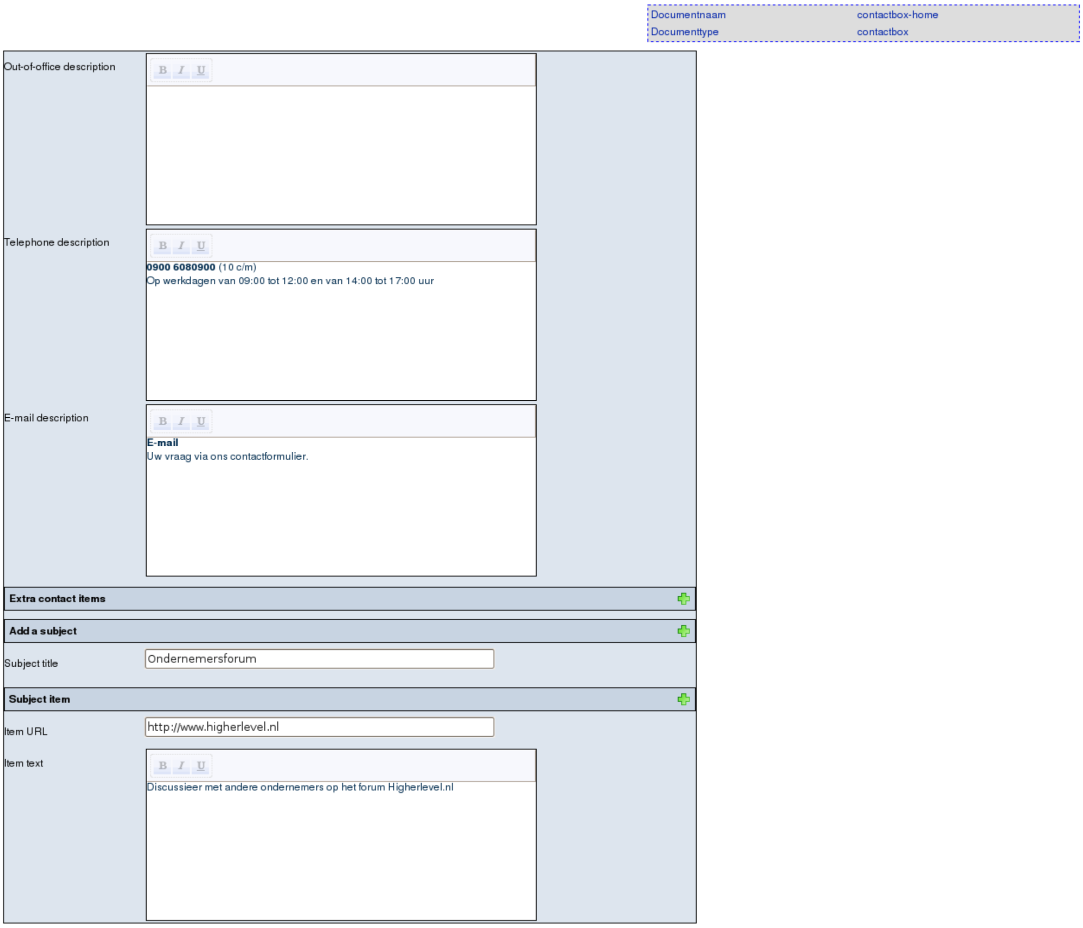

Branches
Bladeren
Alle branches
Themes
Bladeren
Company activities
Bladeren
Keywords
Description
Review date
17-11-2009
Language
Nederlands
Remarks
Title
Subtitle
Findable
Ja
Nee
Paragraph
Paragraph title
Text
Connecting internal products
Link
Bladeren
Title internal products
Connecting external products
Link
Bladeren
Title external links
Downloads
Link
Bladeren
Title of downloads
General repeater
Title
Optional text
Adding internal product(s)
Linking internal product(s)
Bladeren
Adding external product(s)
Linking external product(s)
Bladeren
Adding file(s)
Linking file(s)
Bladeren
Adding self to defining link(s)
Title own url
Linking own url

7.5 Template: Contactbox

The contact box template is the one used to fill in the information to be displayed on the right column of almost every page. When creating a new contact box you will have to fill in a template composed mainly by three HTML areas where you can put the content you are willing to display for the following three sections:

- Out-of-office description
- Telephone description
- E-mail description

The content displayed in the home page of the website will be picked up from the contactbox-home.xml, while the content to be displayed in every other page of the website will be picked up from the contactbox.xml.



7.6 How templates and the website relate to each other

After reading the previous paragraphs, it should be clear that some templates serve as input for others. This goes for the template Organisation and the template Web address.

All things considered, the most important templates in the CMS will be the product template and the textpage template. These allow a wide variety of pages to be produced on your PSC. Of course the content of what is displayed on your website (front-end) depends on the template you use and the fields that are filled in.