



ATTRACT, EMPOWER, COORDINATE, AND APPRECIATE YOUR VOLUNTEERS

VolunteerMatters Components Admin Guide

Version 2.0

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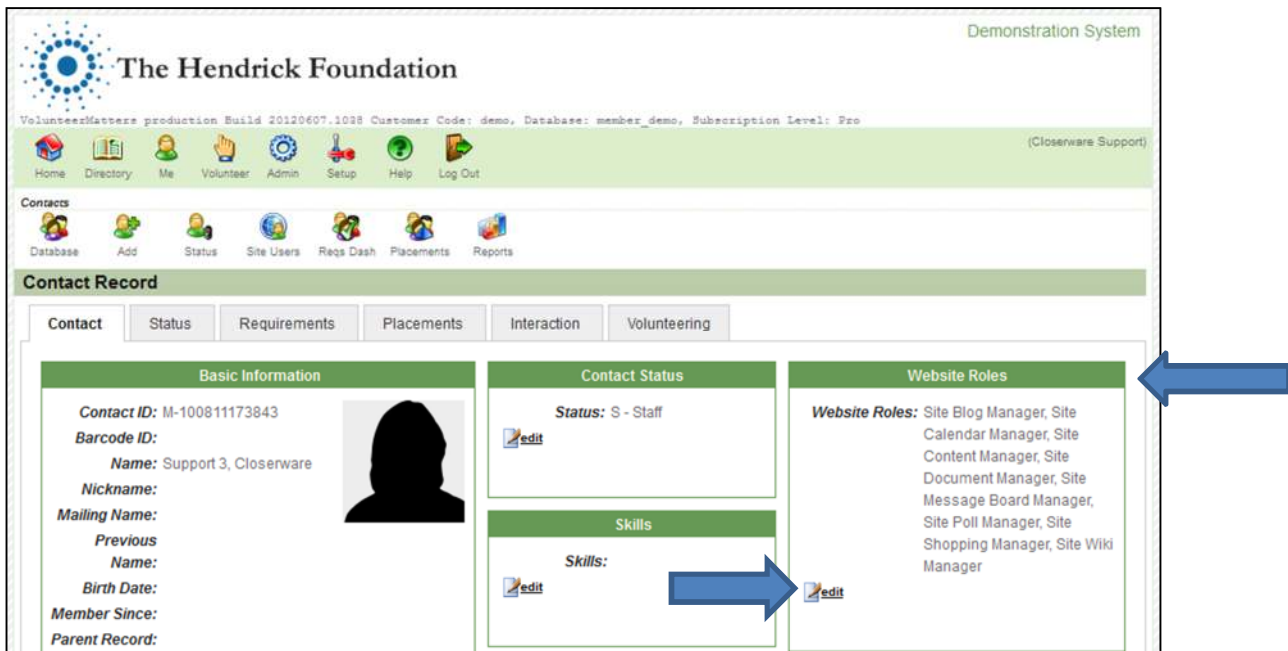
Administrative Roles

Administrative accounts for the VolunteerMatters Components are defined within your VolunteerMatters contact database (<http://www.volunteermatters.com/login/{customercode}>) in a built-in custom field called “Website Roles”. There are up to ten different types of administrative roles you can assign to contacts in the VolunteerMatters database. The availability of these different roles depends on your subscription level with VolunteerMatters Components.

- 1. Site Blog Manager** – Can administer to Member Area landing page or any page that has a Blog or Blog Aggregator portlet configured.
- 2. Site Calendar Manager** – Can administer to any page that has the calendar portlet configured. This includes creating/editing/deleting events as well as event permissions.
- 3. Site Content Manager** - Can edit any page with a web content display portlet. These are the homepage, subpages, etc.
- 4. Site Document Manager** - Has full control in any Documents and Media portlet. An example is if you have a “site file manager” page in the Member Area for admins. Though a Documents and Media portlet can be added to any page.
- 5. Site Message Board Manager** - Can administer to any page that has a message board portlet configured. This includes creating/editing/deleting categories, threads, posts, etc. as well as thread/category permissions.
- 6. Site Newsletter Manager** – Future functionality that is not in use as of yet but is a simple portlet that will be a collection of contact information for a newsletter signup and this role will have administrative privileges on those portlets.
- 7. Site Poll Manager** – After a “Polls Display” portlet is added to any page, this role can administer that portlet. This includes creating/editing/deleting questions, as well as question permissions.
- 8. Site Shopping Manager** - Can administer to the Shopping portlet. This includes creating/editing/deleting product categories, items, coupons, etc. as well as category/item permissions and managing orders.
- 9. Site Wiki Manager** - Can administer to any page that has a Wiki portlet configured. This includes creating/editing/deleting pages, child pages, etc. as well as permissions.
- 10. Site Page Manager** – **By default, this role is not activated for new customers. It is only added upon request. If activated, it is HIGHLY RECOMMENDED that this role only be given to a select few administrators. With this role, among other things, an administrator can permanently alter the site’s page hierarchy, design, and layouts. If our customers would like**

our professional services team to make any changes to their system that would require the Site Page Manager role, hourly charges may apply. There is a separate user guide specific to the functions available to 'Site Page Managers'.

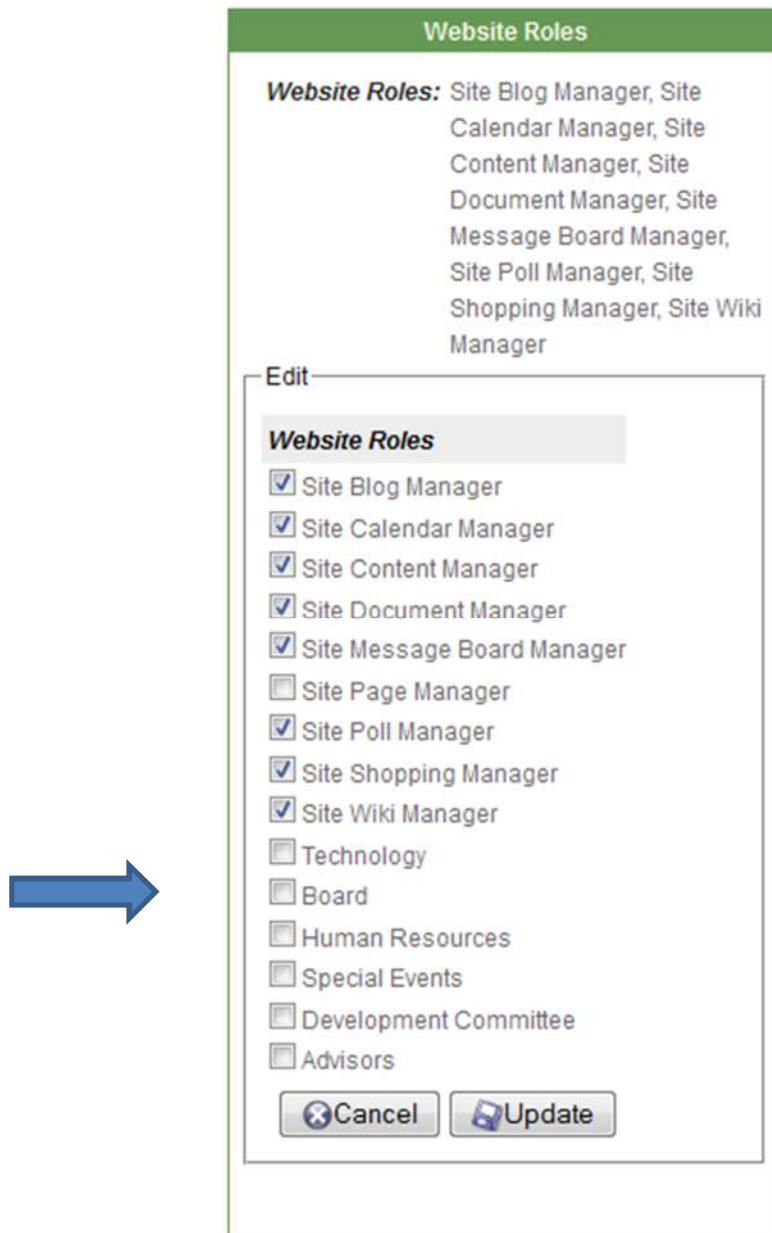
To assign these roles to a member you will log into your VolunteerMatters administrative system (<http://www.volunteermatters.com/login/{customercode}>) and click on the “Admin” icon (⚙️) and then the “Database” icon (👤) to get to your contact database list (<https://www.closerware.com/vm/member/ContactList.do>) and then navigate to the member you wish to add a role to and click on the “View Record Detail” icon (👤). Then you will click the “Edit” button/link (✏️) to edit the “Website Roles” custom field.



There you can check the “roles” that member is supposed to have within your VolunteerMatters components and the next time they log into the Website they will have those administrative abilities.




In addition to these built-in VolunteerMatters components roles, an administrator within VolunteerMatters with access to the Member Database can create additional “roles” or “groups” that can be used to identify members and provide additional permission levels within the VolunteerMatters components.

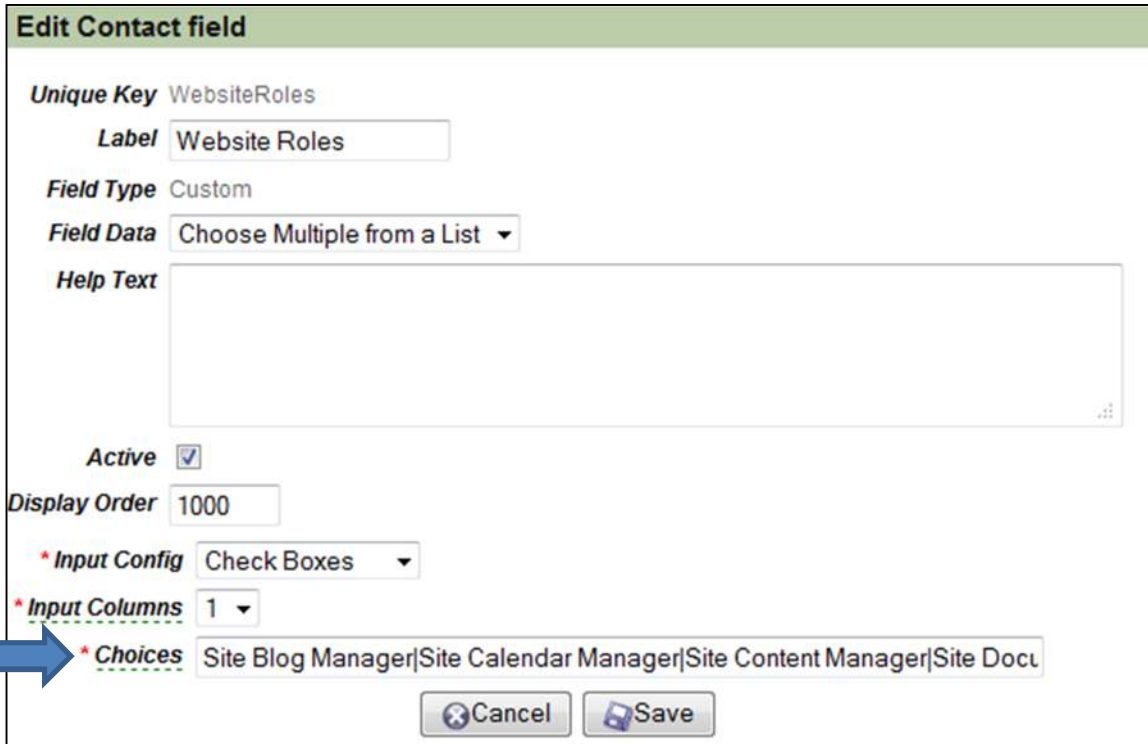
For example, you could add a “Board” or “Technology” group/role that can identify those members who would only have access to a “Board” message board or documents and media portlet.



Once a new “group” or “role” is checked for the member, the next time they log into the website they will have these new permission levels.

To add these new “groups” or “roles” an administrator with the proper privileges will log into

VolunteerMatters and click on the “Setup” icon () and then the “Contact Record” icon () and then click ‘Edit’ () on the “Website Roles” custom field:



Here you can add, remove, or re-order a "Choose from a List" choices on the Website Roles custom field.

When defining or editing a "Choose from a List" custom field options on a custom field, you can manage the "Choices" field with a list of choices separated by pipe symbols (i.e., Site Content Manager|Board|Technology|etc). The system will display the choices in the order they have been entered in your setup. To update a VolunteerMatters custom field edit the "Choices" field to include all choices you would like to appear in the order you would like them to be displayed.

****Please ensure that you do not remove any of the "built-in" administrative roles.**

Click "Save"

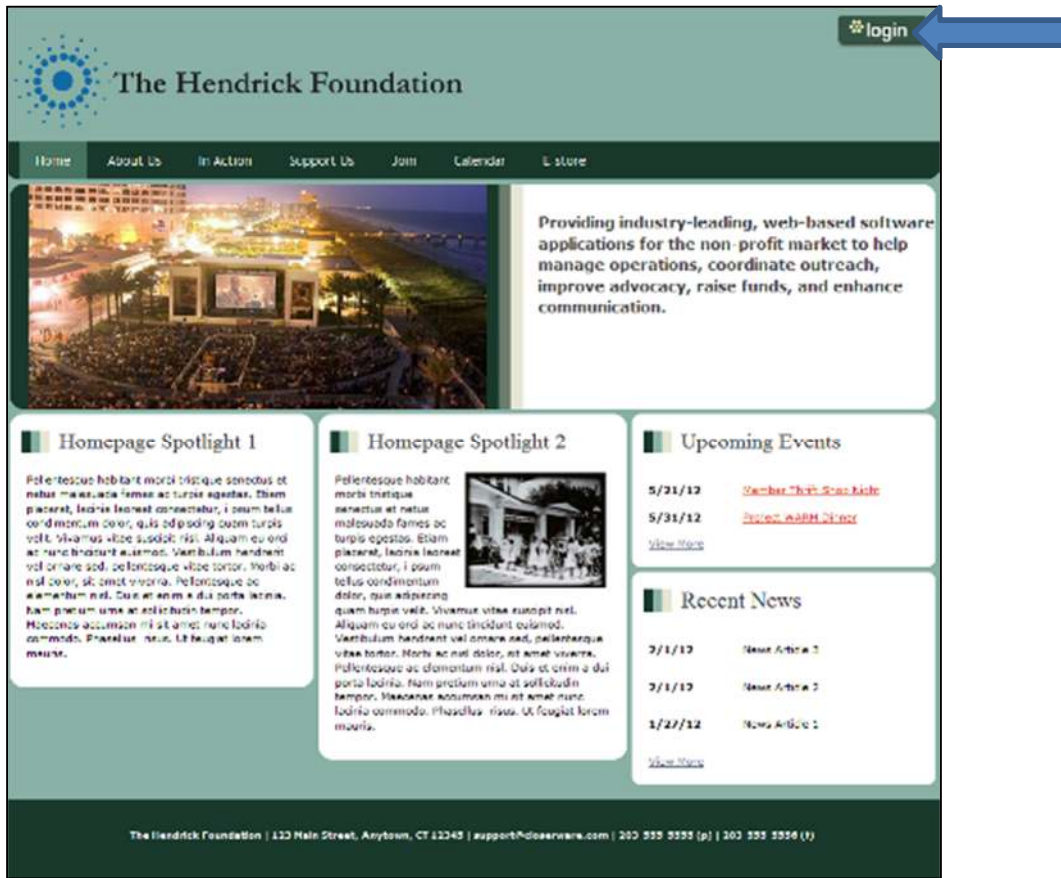
The new "Groups" or "Roles" **are not automatically available within your website** to use as permissions. They will only appear within the Website as a permission choice once they have been assigned to a member and that member logs into the Website.

We would recommend having a "dummy" record that you have assigned all of the role options that you use to populate the website with any new roles created.

Website


Content Editing


To edit content on an existing page/portlet within your Website, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.



Once you successfully login in with the proper administrative privileges the screen will now include a “dockbar” at the top of the screen:



and each web content portlet that can be modified will include an “edit web content” icon : 

To edit the content you will navigate to the subpage or homepage spotlight in question and then scroll down to the bottom of the page (or locate it on the homepage) and click on the "Edit Web Content" icon ().

This will be in these typical locations:

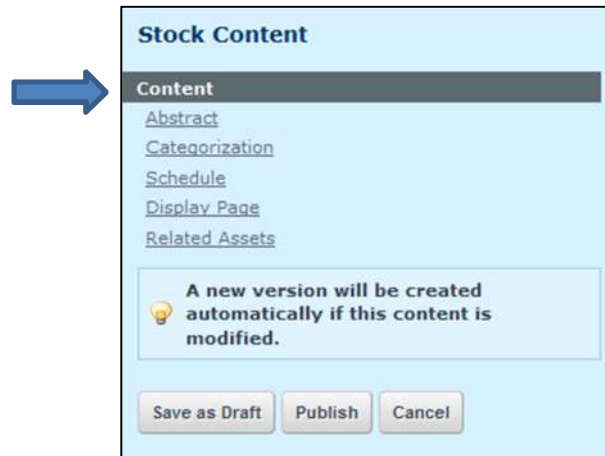
HOMEPAGE:



SUBPAGE:



Once you click on the Edit Web Content icon, you will be brought to the Web Content Editor for that particular piece of Web Content. It will default to the “Content” link.

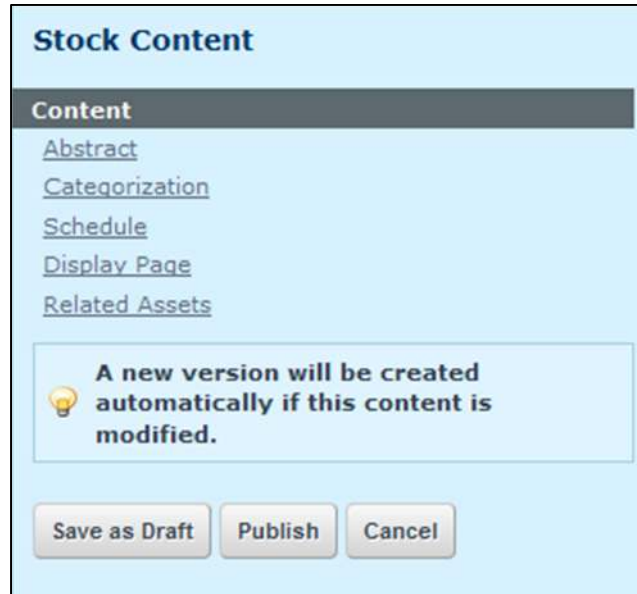


It will look like the following and you will have access to edit the following while on the content:

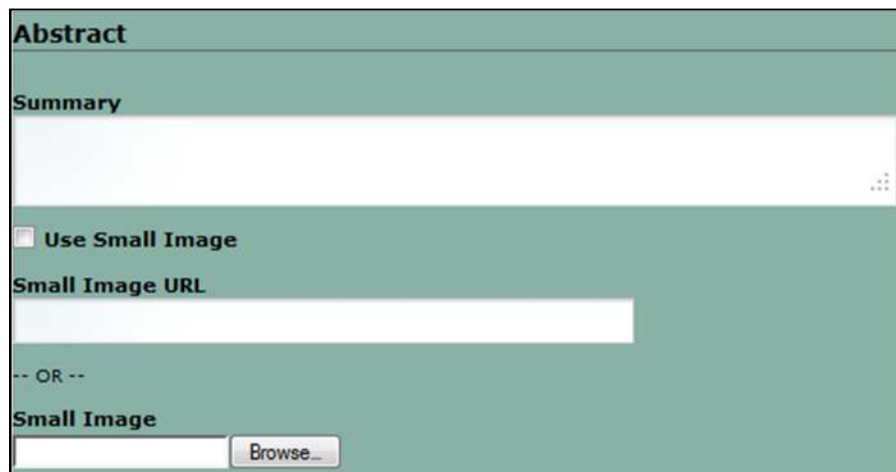
- 1 - Web Content Name (this is not the page name)
- 2 - Language Settings (will default to English – United States)
- 3 - WYSIWYG editor
- 4 - “Save as a draft”, “Publish”, or “Cancel” buttons



Also available will be the following options when editing a page:



Abstract: If this web content is tagged for display in an Asset Publisher, such as a Recent News Portlet and that Asset Publisher is set to display the “Abstract” list you can define the content and image that will represent this page. This functionality is used only for Blog Displays at this time but is available if a different asset publisher is created.



Categorization: Tags are keywords that can be attached to web content in order to help users find content and to allow specific content to display in an asset publisher.

Categories are a hierarchical organization of content whose structure can be defined by administrators. Tags will only be entered for News items on your site at this time as well as blog entries for blog search results. We will provide more information on this in the coming pages. Categories will not be used at this time. For the most part, you can ignore both of these when simply editing web content at this time.

Schedule: You can determine when the content is displayed, expired, and/or reviewed**. This is an excellent way to keep your site current and free from outdated (and perhaps incorrect) information.


- Display Date: Sets (within a minute) when content will be displayed.
- Expiration Date: Sets a date to expire the content. The default is one year.
- Never Auto Expire: Sets your content to never expire.
- Review Date: Sets a content review date.
- Never Review: Sets the content to never be reviewed.

**Currently Review Date is not used. Always leave content set to "Never Review".

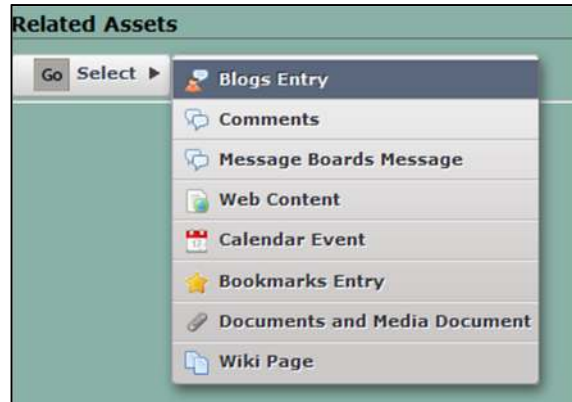
Display Page: A Display Page can be any page with an asset publisher set to its default settings. This is preconfigured by Closerware Support.

Once you click on Display Page, and select a previously created page as the display page for the content. Currently this is only used for "News" content. We will have more information on that in the News section. You can ignore when simply editing pages.

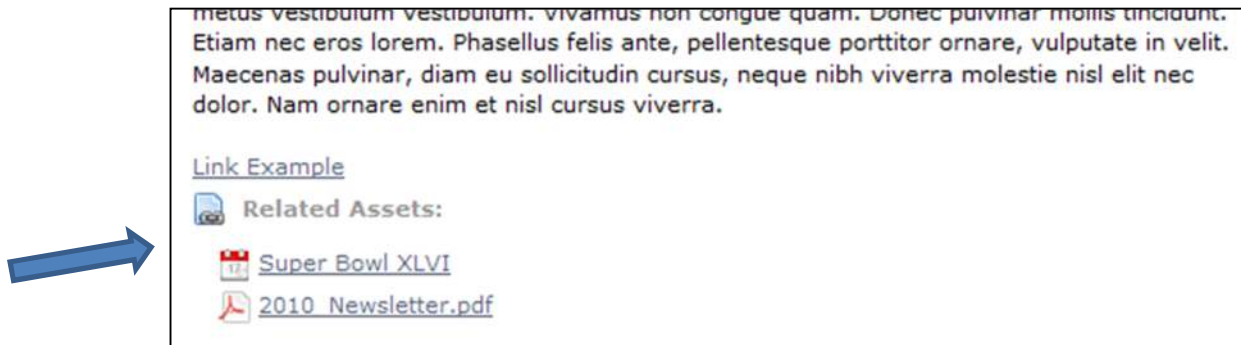
Related Assets: Enables you to connect any number of assets within a site or across the portal, even if they don't share any tags and aren't in the same category. With the Related Assets you can show links to any assets which are related to content displayed on that page.

Once you click on the Related Assets link when editing a page and click on the "Go/Select" button () you will be present with the list of available asset types that you can then select from to

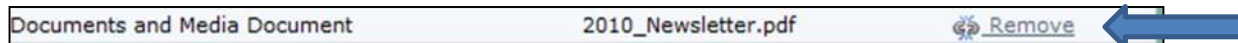
display on that page:



For example if you select a Calendar Event you can select from events available within the Calendar and if you select Documents and Media Document you can select a previously upload file to display. Once selected and you click “Publish” on the page you will be brought back to the actual page. This makes your changes live on the website. This is how the Related Assets selected will be displayed on the page:

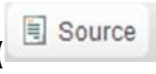


To remove Related Assets you will click on the “Edit Web Content” icon on a page and then select Related Assets and there you will have a list of the current Related Assets for the page. You will simply need to click the “Remove” button and then click “Publish”.





For the majority of pages you will be simply editing the content using the WYSIWYG Editor.

The WYSIWYG editor is a flexible tool that gives you the ability to add text, images, tables, links, and more.


If you're HTML savvy, you can click the Source button () and write your own HTML if you wish.

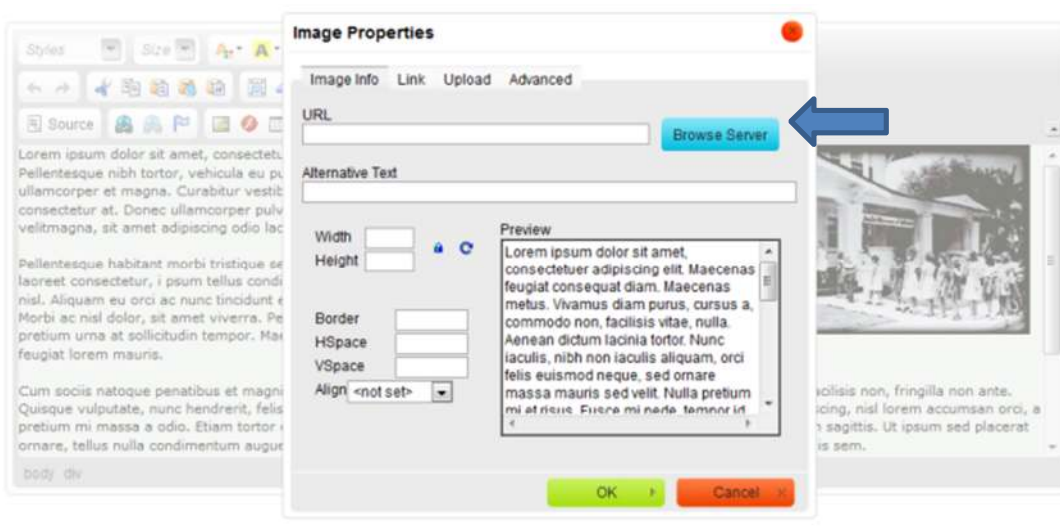
After you're finished with your changes you can either save as a draft and/or click publish. "Save as a draft", saves the content in draft form while you are working on the page. Once you're satisfied with your changes, select Publish. This makes your changes live on the website.

Note: if you want to view your page the way your users will see it (i.e., without all those portlet controls and icons), go up to the Dockbar and uncheck "Edit Controls" (). This makes all those extra controls you see as a content administrator disappear. If you need to use those controls again, just check "Edit Controls" again. You can also "pin" the Dockbar so it is always visible when you scroll down by clicking the "Pin" button () in the Dockbar.

Here are some instructions when using the WYSIWYG Editor for specific tasks.

To add Images using the WYSIWYG Editor:

Place your cursor in the spot you would like the image to appear and click the "Image" button (). This will open the "Images Properties" window:



You will then click the blue "Browse Server" button. This will open the "CKeditor - Resources Browser Window":



Then click on your main root folder link (in this example it is labeled “10437 – The Hendrick Foundation”) and navigate to the image you wish to use. You can also create a new folder or upload a new image using those tools available in the window.


The folder will be created in whichever folder you are in at the time. To upload a new image just navigate to the folder you wish to house the image and click “Browse” and locate the image on your local machine and then select it and click “Open”. This will return to you “CKeditor - Resources Browser Window” and then you will click “Upload”. Once the image is uploaded it will be available for immediate use.

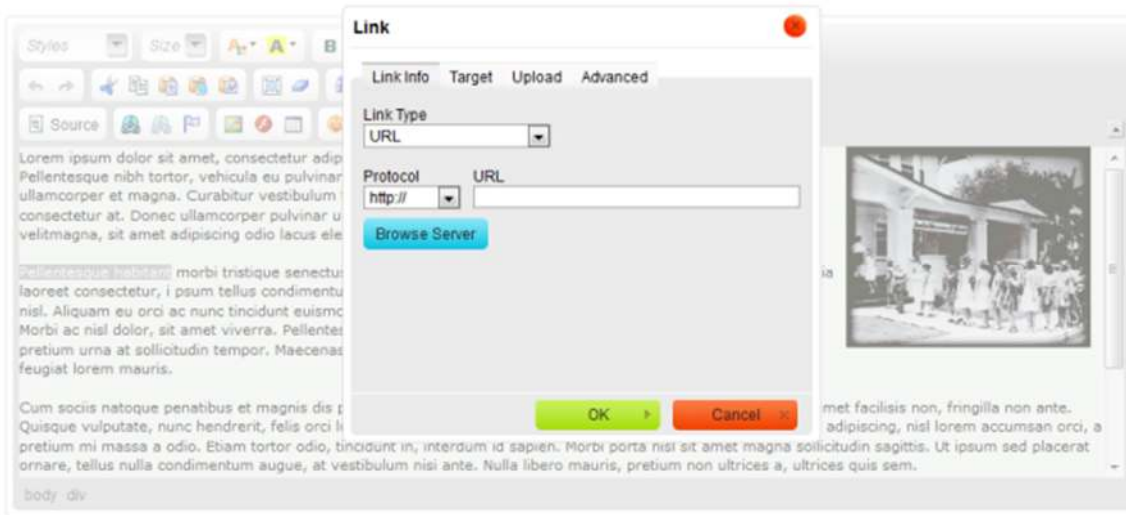
Once you have located the image you wish to use simply click on it and you will be returned to the “Image Properties” window where you will see the image’s width and height. Here you can set the image attributes: border, horizontal/vertical space, and alignment.

Then click the green “OK” button and your image will be displayed in the WYSIWYG Editor.

Once you're satisfied with your changes, select Publish. This makes your changes live on the website.

To add File Download links using the WYSIWYG Editor:

Highlight the text or image that you would like to initiate the file download and click the “Link” button (). This will open the “Link” window:



You will then click the blue “Browse Server” button. This will open the “CKeditor - Resources Browser Window”:



Then click on your main root folder link (in this example it is labeled “10437 – The Hendrick Foundation”) and navigate to the file you wish to use. You can also create a new folder or upload a new file using those tools available in the window.

The folder will be created in whichever folder you are in at the time. To upload a new file just navigate to the folder you wish to house the document and click “Browse” and locate the file on your local machine and then select it and click “Open”. This will return to you “CKeditor - Resources Browser Window” and then you will click “Upload”. Once the file is uploaded it will be available for immediate use.

Once you have located the file you wish to use simply click on it and you will be returned to the “Link” window where you will see the file has been populated in the URL. Here you can set the different file

download link attributes. You will only need to modify the “Target” attribute and change the Target to “New Window (_Blank)”.

Then click the green “OK” button and your file download link will be displayed in the WYSIWYG Editor.

Once you're satisfied with your changes, select Publish. This makes your changes live on the website.

To add hyperlinks using the WYSIWYG Editor:

Highlight the text or image you would like to associate with a link and click the “Link” button (🔗). This will open the “Link” window:



Here you can select three different link types for the dropdown:

- 1 - URL
- 2 - Link to anchor in the text (Anchors must be previously created using the anchor button (🔗)).
- 3 – EMAIL

For **URLs**, If this is a link to an outside website you will need to enter the full website link into the URL, such as <http://www.closerware.com> and select the appropriate target frame from the Target tab and click OK. For outside links you should always change the Target to “New Window (_Blank)” so the visitor will not be taken from your site.

If this is a link to a page within your website it is advisable to enter a 'Relative Link' into the URL field. For example the following is an absolute URL to a Closerware page:

<http://demo.closerware.com/about-us>

The relative URL would be:

/about-us

You should leave the Target alone for relative links as it will allow the visitor to operate in the same original window. Then click “OK”.


When the relative path is inserted as the hyperlink's URL the website will automatically insert the base URL of the current webpage. To find the hyperlink for a page within your site, simply navigate to the appropriate page and copy everything from .com/.org/.edu/etc to the end of the URL.

For **Email links**, change the Link Type to Email and enter the appropriate data. You can enter the Email Address, Message Subject and Message Body. If you do not wish to have a prepopulated Subject or Body please leave those fields blank. Then click “OK”.

Once you're satisfied with your changes, select Publish. This makes your changes live on the website.

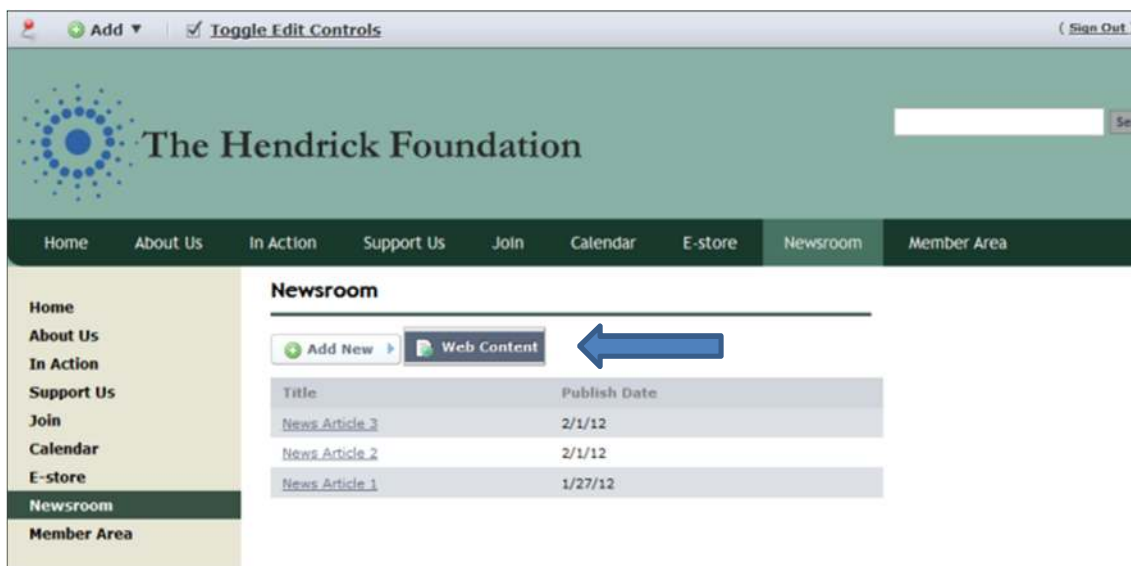
News Items

Adding:

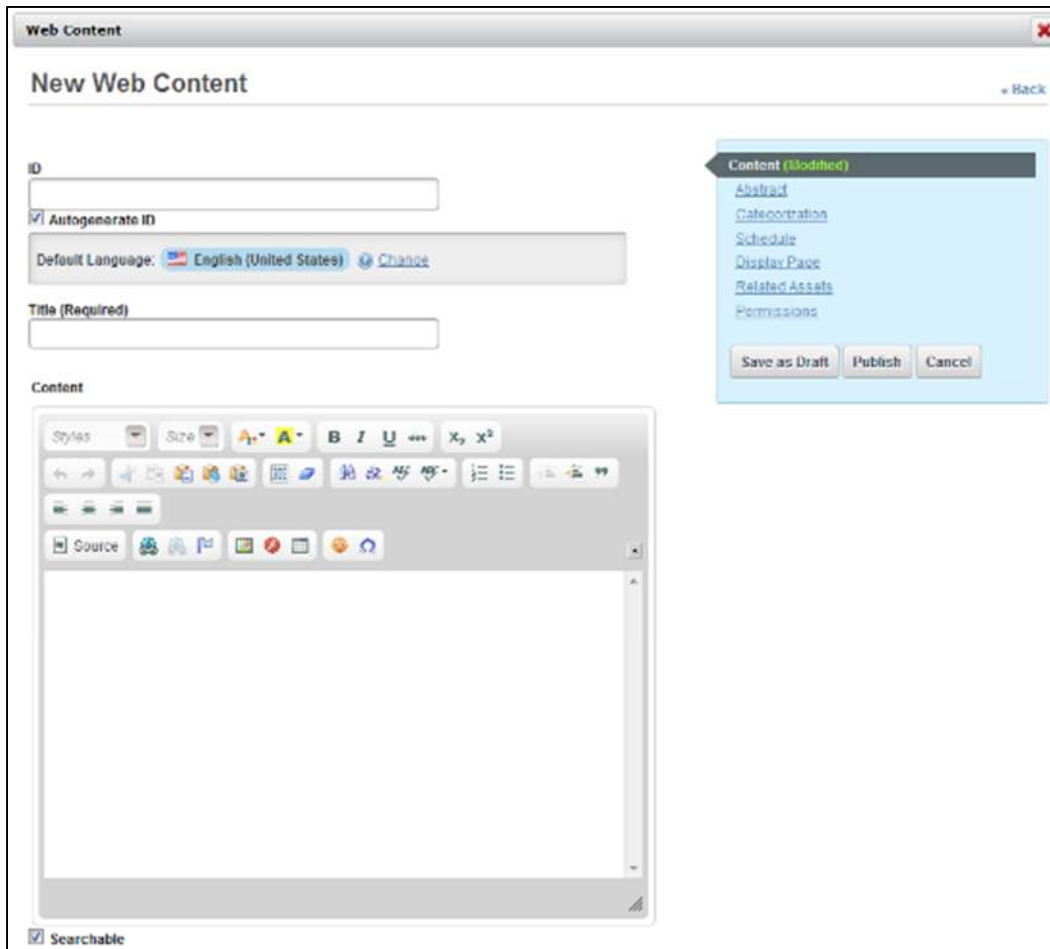
News items can be added by a site admin or site content manager from your specific news page or via any Recent News portlet via the “Add New” button ().

WE RECOMMEND THAT YOU ADD NEWS ITEMS VIA THE SPECIFIC NEWS PAGE AS IF YOU ADD VIA A PORTLET IT WILL REQUIRE AN EXTRA STEP AND SETTING THE “DISPLAY PAGE” FOR THE ITEM. THE NEWS PAGE ADDS THIS AUTOMATICALLY.

To Add a News Item log into your website and navigate to your news page or a page that has a Recent News portlet and click the “Add New” button. This will open a button labeled “Web Content”. You will then click on that secondary button.

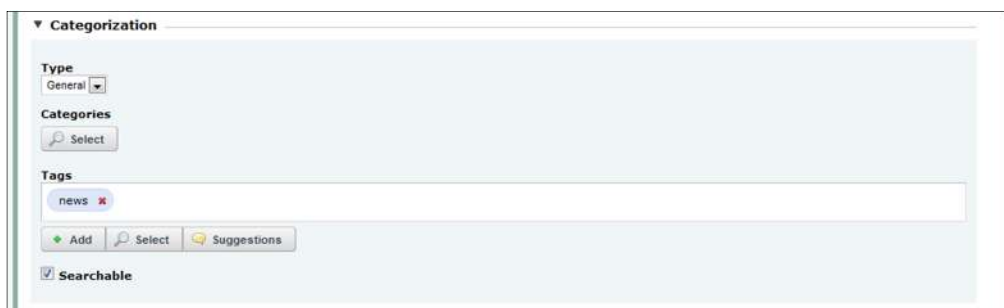


This will open up the “New Web Content” page:



The steps to publishing the news item are as follows:

- 1 – Check the box for “Autogenerate ID”.
- 2 – Enter your News Item Name in the “Title” field. This will be the link that is displayed on the portlet and News Page.
- 3 – Enter any content into the WYSIWYG Editor.
- 4 – A “News” tag will be entered automatically when you first create the item but you can double check by clicking on the “Categorizations” link and check the “Tags” section. If it is missing you can simply type “news” and press enter or search/select it.

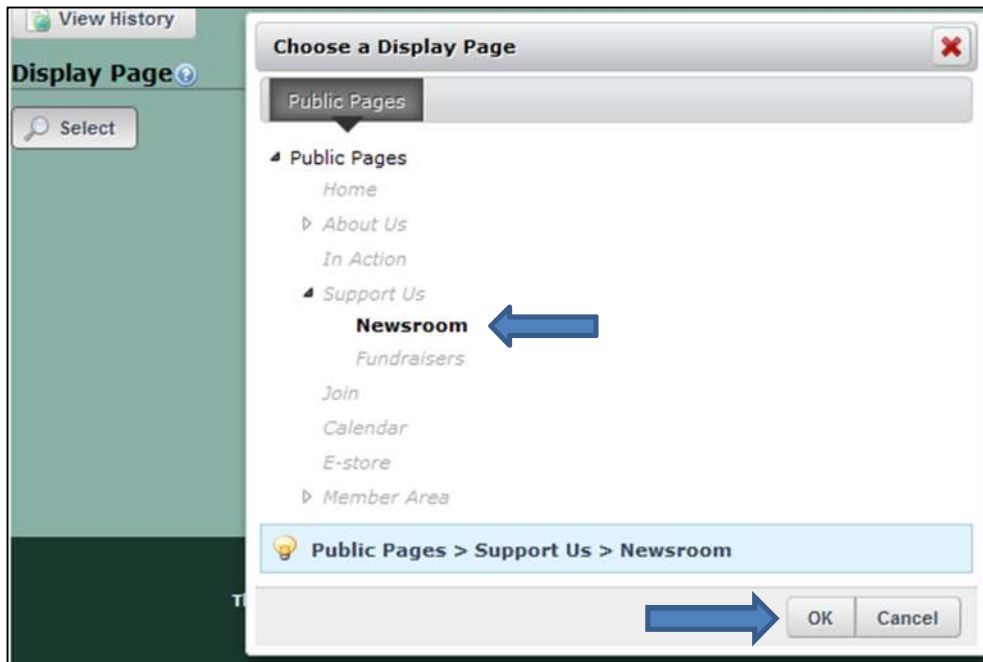


5 – You can also edit the “Abstract”, “Schedule”, and “Related Assets” for the News item like any other Web Content.

6 – Next you will need to set the “Display Page” for the Web Content to be your main News page. **THIS IS ONLY NECESSARY WHEN CREATING NEWS ITEMS VIA RECENT NEWS PORTLETS.** Click on “Display Page” in the links.



Then click on the “Select” button and this will open the “Choose a Display Page” window. You will just navigate through your site hierarchy to locate your main news page and click on it and click “OK”.



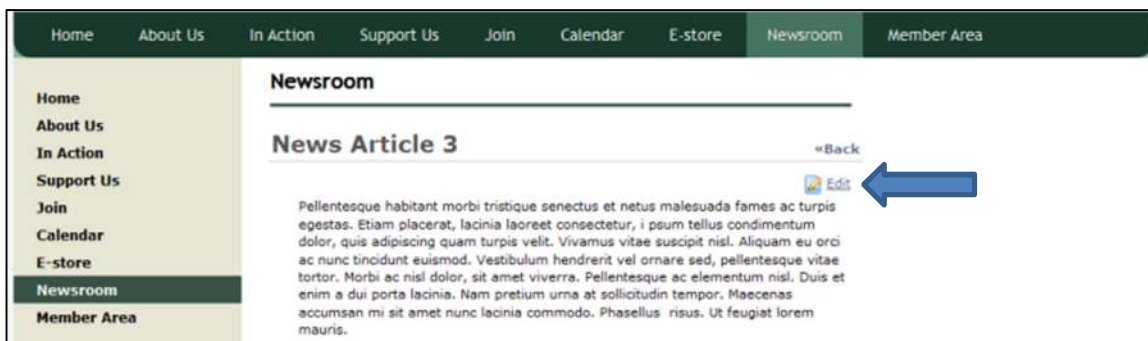
Once you click “OK” you will see the Display Page set similar to the following:



7 - Once you're satisfied with your item, select Publish. This will add the new “news” item to your website. And when you click on the item from a “Recent News” portlet you will be taken directly to the item.

Editing:

To edit an existing News item you will login to your website and navigate to your main News page. You can then either click on the link of the item you wish to edit and after it opens click on the “edit” icon:



Or from the list of items click on the “edit” icon to the right of the news item you wish to modify:



This will open up that news item in the standard Web Content page and you can edit like you would any normal page and when you're satisfied with your changes, select Publish. This will update the “news” item to your website with the changes you have made.

Deleting:

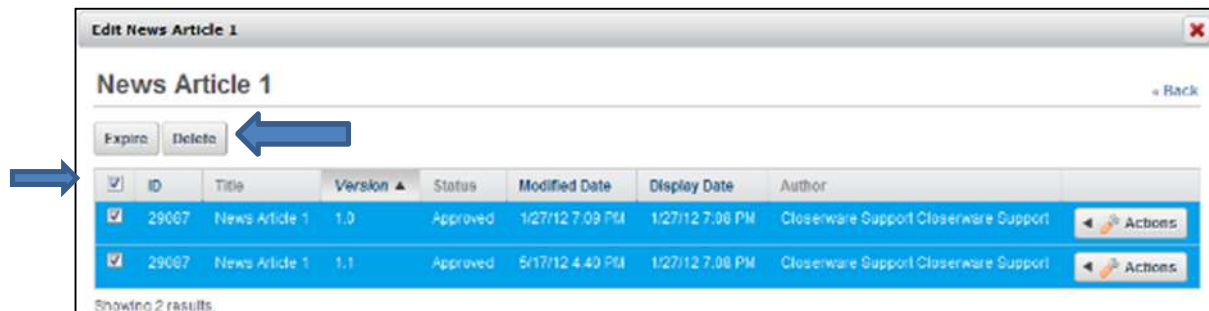
To delete an existing News item you will login to your website and navigate to your main News page. You can then either click on the link of the item you wish to edit and after it opens click on the “edit” icon:



Or from the list of items click on the “edit” icon to the right of the news item you wish to delete:



This will open up that news item in the standard Web Content page and you will then click on the “View History” button (View History) and then click the “check all” button to select all versions (if necessary) of that web content and then click the delete button:





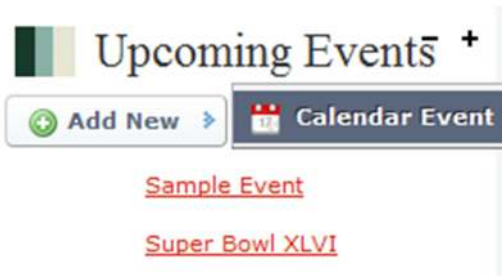
This will remove the “news” item from your website.

**You can also delete particular versions of the web content by clicking on the “Actions” button (Actions) and clicking Delete.

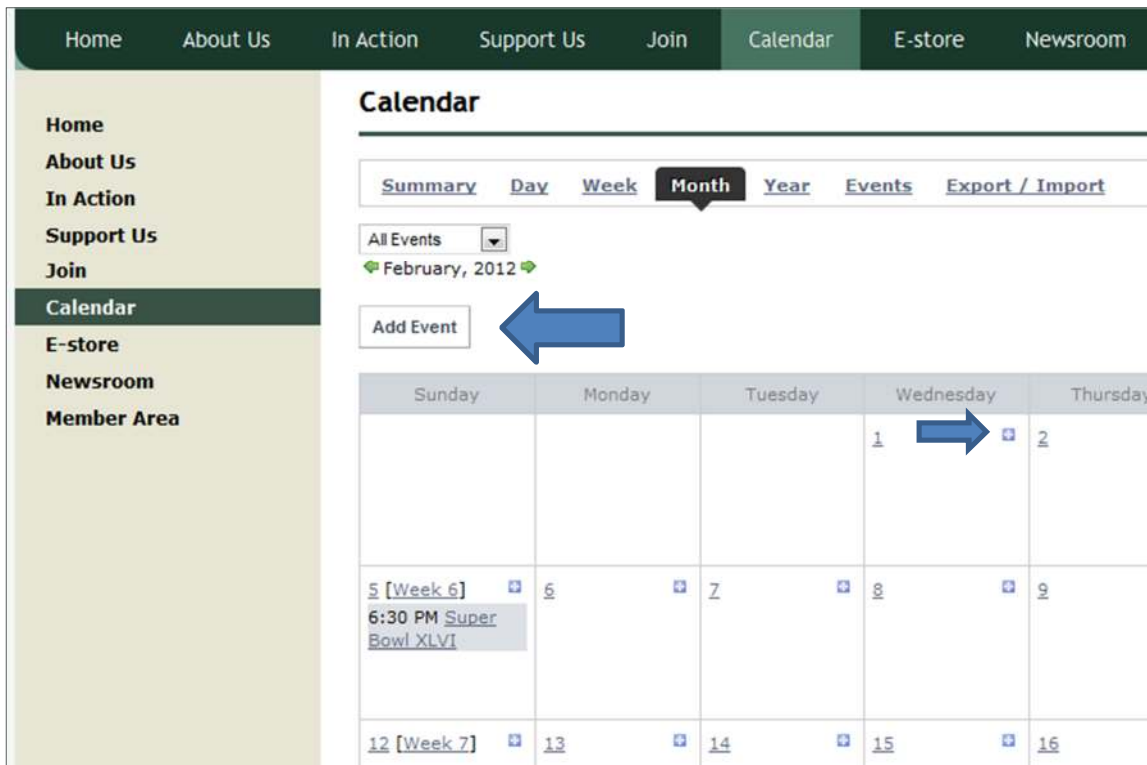
Calendar Events

Adding:

Calendar Events can be added by an admin or content manager from your Calendar page by clicking the “Add Event” button () or via any Calendar Event portlets via the “Add New” button () and clicking on the “Calendar Event” secondary button:



To Add a Calendar Event log into your VolunteerMatters Components’ site and navigate to your Calendar page click the “Add Event” button or the “+” icon on any date to prepopulate the date information on the “New Event” page:



The "New Event" page appears that allows you to fill out all the information for your event.

Start Date/Time: The date and time the event starts.

Duration: How long the event will last.

All Day Event: Check this box to disassociate time from the event and make it last all day.

Time Zone Sensitive: Leave this box checked to make sure that the portal keeps track of the event regardless of time zone.

Title: The title of the event.

Description: A description of the event.

Type: Select from a number of pre-configured event types.

Permissions: Determine who can view the event. (For Public Events select Anyone (Guest Role) and for Member Only Events select Community Members)

Repeat: If the event repeats on a schedule, select the schedule (daily, weekly, monthly. etc.)

End Date: If the event repeats on a schedule but there is an end to the set of meetings, enter the end date.

Reminders: These will only be sent to the email address of the individual creating the event. It is recommended to leave it at the default selection of "Do not send a reminder" for all events.

The next page displays the layout of this form.

When you have finished adding your event, click Save.

Add
Toggle Full Controls
(max 50)

The Hendrick Foundation

Search

[Home](#) | [About Us](#) | [In Action](#) | [Support Us](#) | [Join](#) | [Calendar](#) | [E-store](#) | [Newsroom](#) | [Member Area](#)

- Home
- About Us
- In Action
- Support Us
- Join
- Calendar
- E-store
- Newsroom
- Member Area

Calendar

New Event →Back

Start Date:

Duration:
Hours/Minutes:

All Day Event
 Time Zone Sensitive

Title:

Description:

Event:

Permissions:
 Visible by: [More Options](#)

Categories:

Tags:

Repeat Do not repeat this event.

Never
 Daily
 Weekly
 Monthly
 Yearly

Repeat until:
 No end date
 End by:

Reminders

Reminder: before, and each before the event but

Do not send a reminder
 Email Address (community.admin@thehendrickfoundation.org)
 SMS
 AEM
 ICD
 MDN
 YH

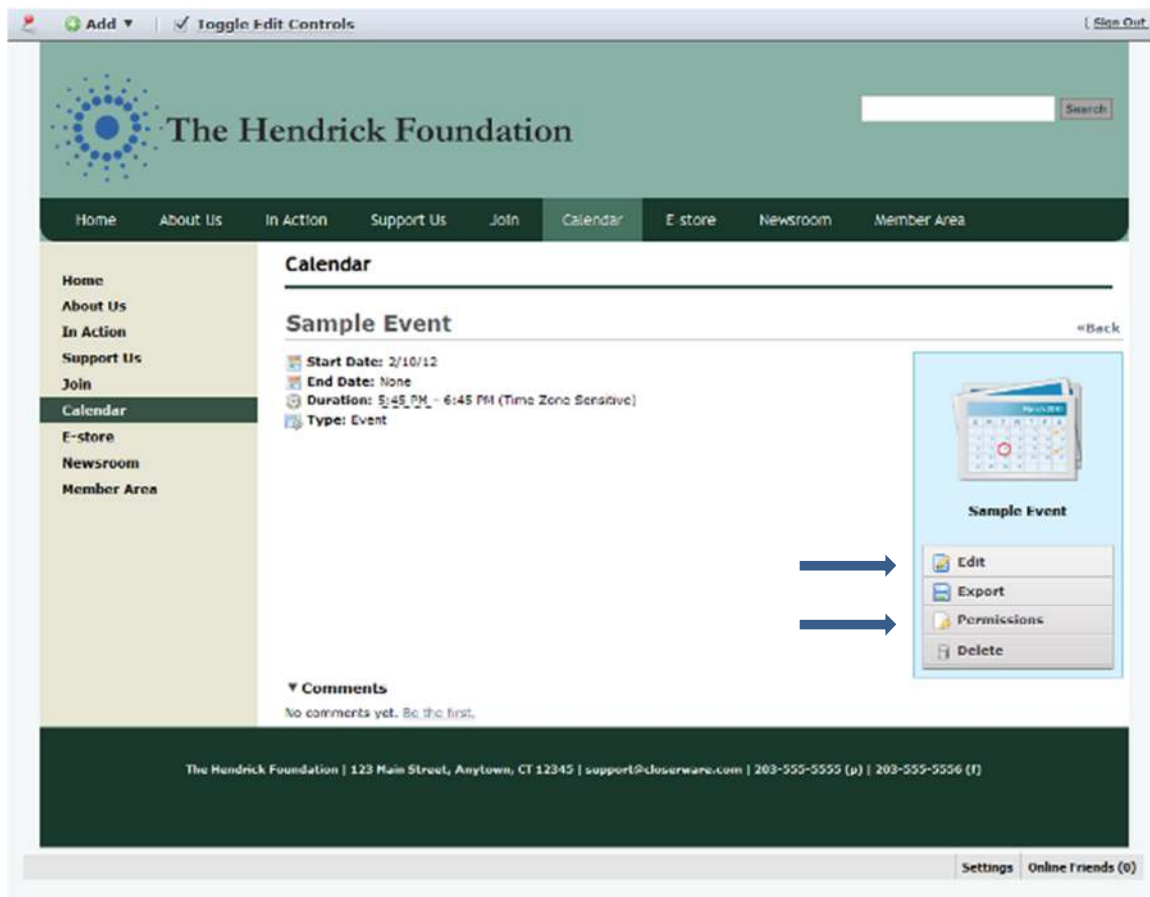
The Hendrick Foundation | 123 Main Street, Anytown, CT 12345 | support@closerware.com | 202-555-5000 (p) | 202-555-5006 (f)

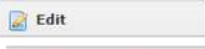

[Settings](#) | [Online Friends \(0\)](#)

Editing:

To edit an existing News item you will login to your VolunteerMatters Components' site and navigate to your Calendar page. Click on the link of the Event you wish to edit.

This will open the Event Page:



To Edit event details click on the "Edit" button () and to edit permissions, member vs public events click on the "Permissions" button ().

The "**Edit**" button will open up that Calendar Event in the standard Event page and you can edit like you were creating a new event and when you're satisfied with your changes, select "Save". This will update the Calendar Event to your website with the changes you have made.

The "**Permissions**" button will open up the Event permissions page and to make a public event Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only event public, you will need to check "View" for the Guest role and click "Save".

The screenshot displays the admin interface for 'The Hendrick Foundation'. At the top, there is a navigation bar with links for Home, About Us, In Action, Support Us, Join, Calendar, E-store, Newsroom, and Member Area. Below this is a 'Calendar' section with a 'Sample Event' configuration table. The table lists various roles and their permissions for actions like Add Discussion, Delete, Delete Discussion, Permissions, Update, Update Discussion, and View. A blue arrow points to the 'View' checkbox for the 'Owner' role.

Role	Add Discussion	Delete	Delete Discussion	Permissions	Update	Update Discussion	View
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Content Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save

The Hendrick Foundation | 123 Main Street, Anytown, CT 12345 | support@closerware.com | 203-555-5555 (a) | 203-555-5556 (f)

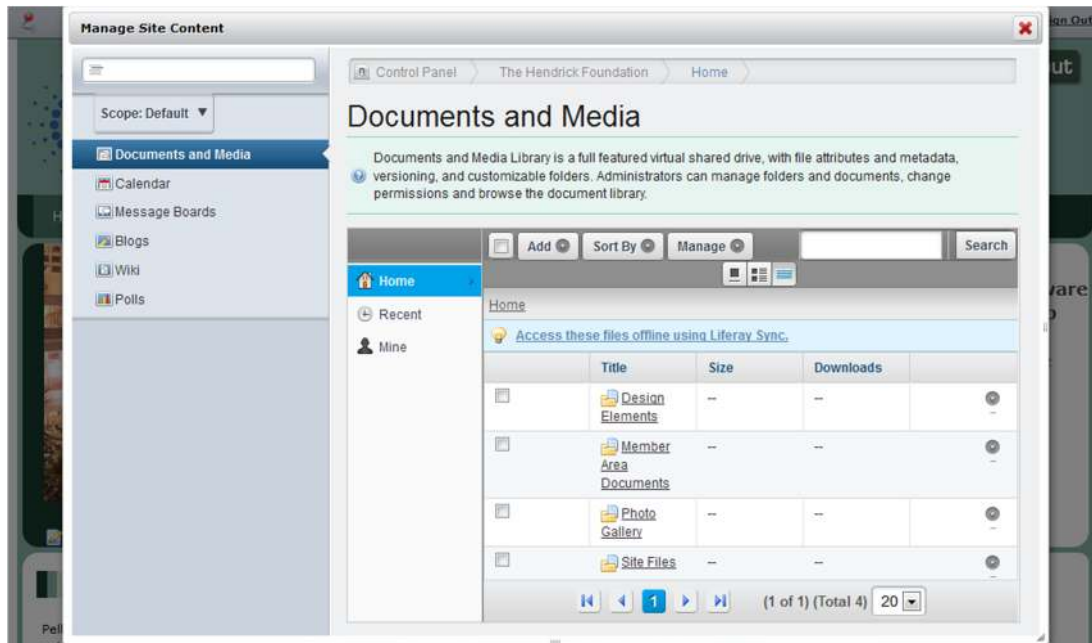
Settings | Online Friends (0)

Site Content

Within the administrative dockbar there is a “Manage” button that will open an additional button labeled “Site Content” (if you have Site Page Manager Role it will include additional buttons).



This will enable an administrator with various roles to administer to different elements (Documents and Media, Calendars, Message Boards, Polls, etc.) via a central location:



Available to this sample administrator are the following:

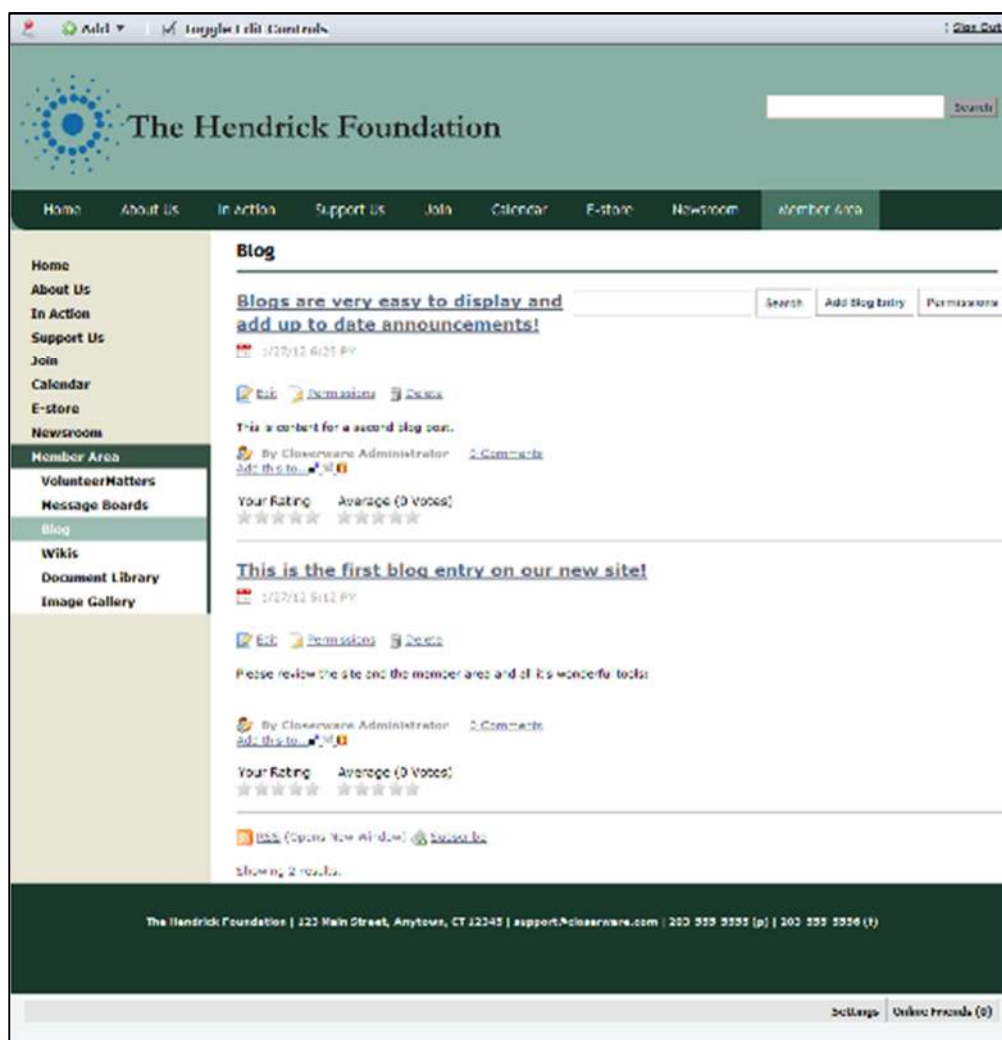
1. Documents and Media
2. Calendar
3. Message Boards
4. Blogs
5. Wiki
6. Polls

Social Collaboration

Blogs

The word Blog is an apostrophe-less contraction of the two words web and log. Blogs were first popularized by earlier web sites which have the format of a running list of entries to which users could attach comments. Over time, more and more sites adopted the format, empowering users to share their opinions and generating lively discussions.

VolunteerMatters Components has a Blogs portlet which allows you to provide a blogging service to users of your web site.



Currently, we utilize the Member Area landing page as the default blog page (not pictured above) in VolunteerMatters Components' sites. However page specific blogs can be added by requesting them from support@closerware.com and if they are available with your subscription (Social Collaboration). If you have Site Page Management you can add yourself. See the "Add Portlets" area of the "Site Page Management" section of this guide.

By default, the Blogs portlet displays the latest entry in its entirety. Closerware support initially configures your blog page with the following default settings:

Maximum Items to Display - 5
Display Style - Full Content
Enable Ratings - Yes
Enable Comments - Yes
Enable Comment Ratings - Yes.

However you can contact support@closerware.com to modify these settings. Here are the options:

Maximum Items to Display: This allows you to choose the total number of blog entries to display on the initial page. You can choose up to 100 to be displayed.

Display Style: Choose between Full Content, the Abstract, or just the Title. Setting this to abstract requires you to enter a brief description in the abstract field when creating or editing a blog post. This will then be displayed along with a Read More link at the bottom of each to allow users to read the whole entry if they wish.

Enable Ratings: Allows you to enable your users to rate your blog entries from one to five stars.


Enable Comments: Allows readers to comment on your blog entries.

Enable Comment Ratings: Allows readers to rate the comments which are posted to your blog entries.

Email From: Allows you to define the From: field in the email messages that users receive from the Blogs portlet.

Adding Blog Entries

After the blog's initial setup, you're ready to begin adding blog entries. Click the Add Blog Entry button

(). You will see the following data entry screen:

Blog

New Blog Entry « Back

Title (Required)

Display Date
June 28 2012 12 :11 PM

Content

Normal Size A A B I U abc x₂ x² [List Icons]

[Navigation Icons]

Source [Media Icons]

Blog Content

body p

Allow Pingbacks

Allow Trackbacks

Trackbacks to Send

Permissions
Viewable by [More Options](#)

► **Abstract**
► **Categorization**
► **Related Assets**

Note also that as you type, the entry is automatically saved as a draft at periodic intervals. This gives you peace of mind in using the portlet from within your browser, since you won't lose your entry in the event of a browser crash or network interruption. You can also tag your entries using the same tagging mechanism found everywhere else in VolunteerMatters Components.


The Blogs portlet also supports trackbacks and pingbacks. Trackbacks are special links that let you or another site know if you or if someone else linked to a blog entry. For example, if you wanted to write an entry in your blog and reference someone else's entry, you might put the URL to the other entry in the Trackbacks to Send field. Similarly, if you want others who link to your blog to let you know about the link via trackbacks, leave the Allow Trackbacks box checked. This will generate a URL that is

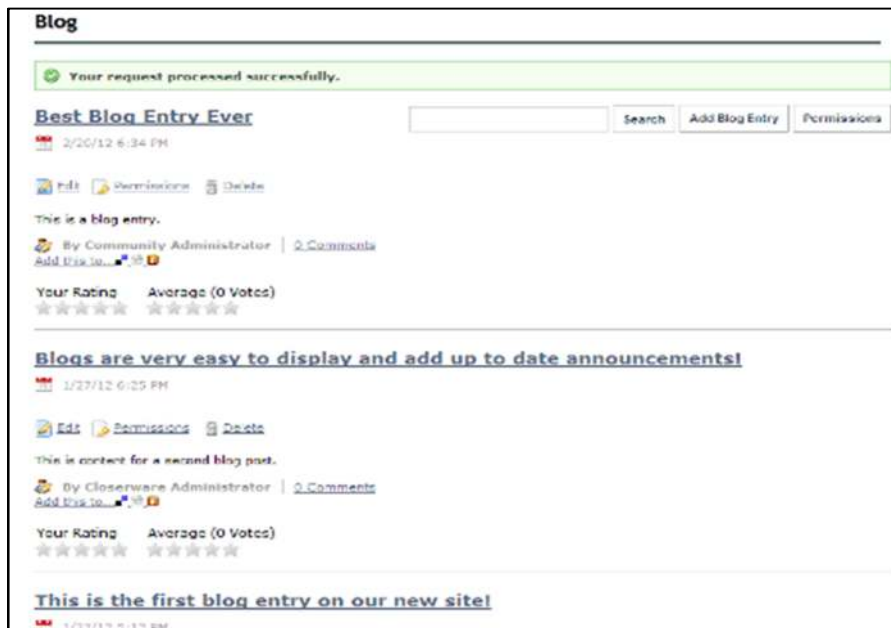
displayed with your blog entry. Others who want to link to your entry can use this URL for the link, and every time the link is clicked on, your VolunteerMatters Components' site will know about it and will be able to keep track of the clicks.

Note that trackbacks only work when the protocol is supported by both the linker and the linkee. For this reason, the Blogs portlet also supports pingbacks. Pingbacks are XML-RPC requests that are similar to trackbacks except they are automatically sent when you link to another site. So if you link to another site in your blog entry, VolunteerMatters Components will send a pingback to that site to notify that site that you linked to it. Similarly, if someone links to your blog entry, VolunteerMatters Components can receive a pingback from that person's site and record the link.

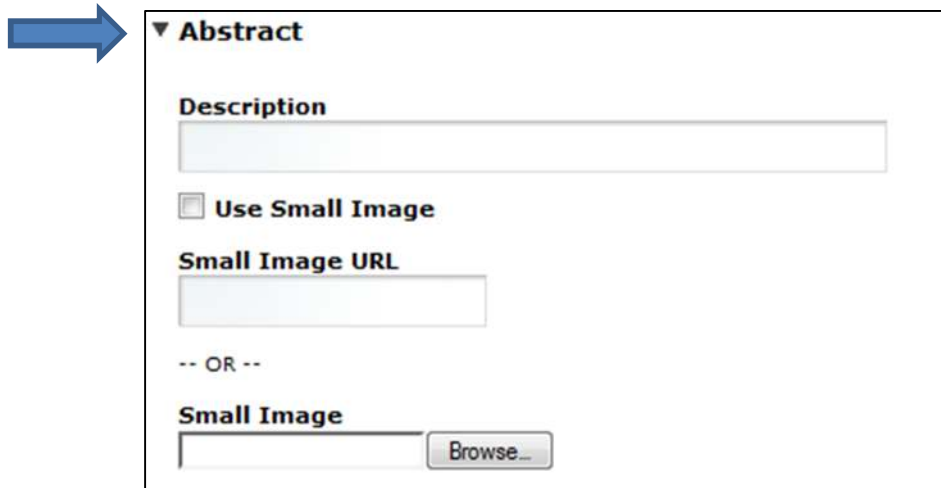
These are advanced features and at this time any data collected is only accessible by Closerware Support.

You can also enter the Abstract, Categorization, and Related Assets.

Once you have finished your blog entry, click Publish (). You'll go back to the list of entries, and now your entry is displayed. Here is what it looks like:



To edit the "Abstract" information, if your blog is displayed in that form, while creating or editing your blog, click on the Abstract link and then you can enter the content and add an image URL or upload an image:



▼ Abstract


Description

Use Small Image

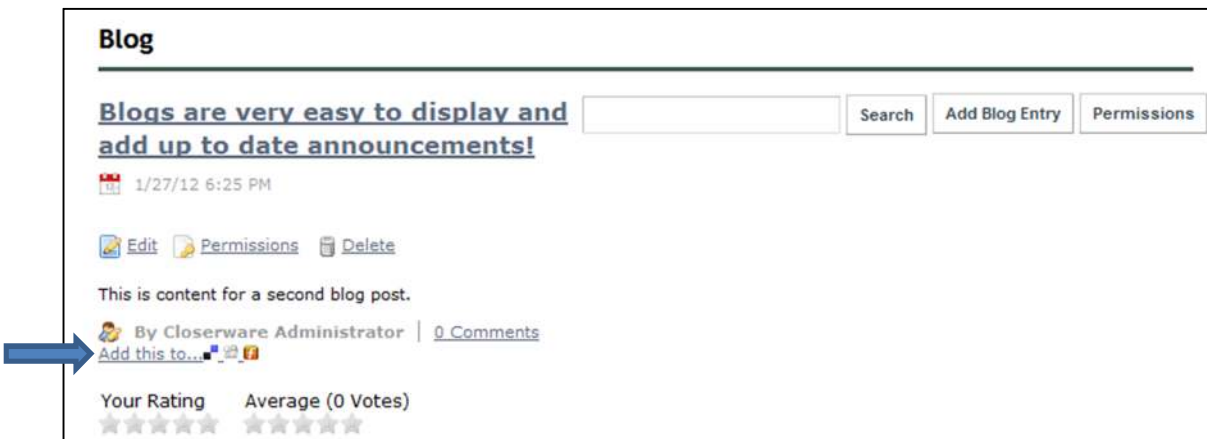
Small Image URL

-- OR --

Small Image


Once you have entered the abstract description and included image (if desired) you will click Publish ().




Additionally, the full view of a blog contains convenient links to add blog entries to popular aggregating sites such as Digg, del.icio.us, and others. This gives your readers an easy way to submit your blog entries to these aggregators, potentially driving further traffic to your site.




Blog





Blogs are very easy to display and add up to date announcements!

 1/27/12 6:25 PM

 [Edit](#)  [Permissions](#)  [Delete](#)

This is content for a second blog post.

 By Closerware Administrator | [0 Comments](#)

 [Add this to...](#)   

Your Rating Average (0 Votes)

☆☆☆☆☆ ☆☆☆☆☆

Editing/Deleting Blog Entries

If you wish to edit or delete an existing blog entry this can be done so by logging into your VolunteerMatters Components' site with the appropriate privileges and navigating to the blog page **and then click on either the 'Edit' or 'Delete' links:**

This is the first blog entry on our new site!

 1/27/12 5:12 PM

 [Edit](#)  [Permissions](#)  [Delete](#)

Please review the site and the member area and all it's wonderful tools:

 By Closerware Administrator | [0 Comments](#)

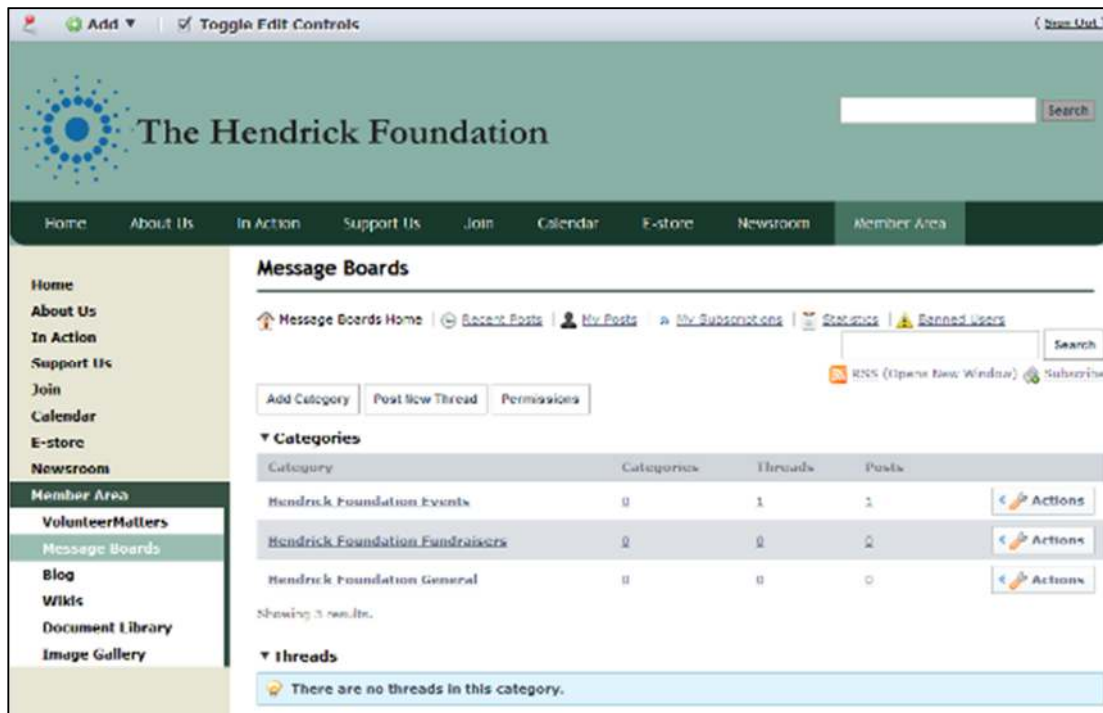
[Add this to...](#) 

Your Rating Average (0 Votes)

When you click 'Edit' you will return to the standard VolunteerMatters Components content editing page. Here you can change the blog entry's Title, display date, content, trackbacks/pingbacks, and categories/tags. When you are happy with your changes, click the 'Publish' button.

As you can see, the Blogs portlet is a full-featured blogging application which gives you and your users the ability to enter the blogosphere with an application that supports anything a blogger needs.

Message Boards



Closerware support initially configures your message board page with the following default settings:

Enable Ratings – Yes

Email From – Default Organization Email.

User Ranks: Newbie=0
Member=25
Enthusiast=100
Addict=250
Guru=500
Mentor=1000

However you can contact support@closerware.com to modify these settings. Here are the options:

Enable Ratings: Allows you to enable your users to rate your message board posts from one to five stars.

Email From: Allows you to define the From: field in the email messages that users receive from the message board portlet.

User Ranks: Users can be ranked according to the number of messages they have posted. You can set up custom ranks here. Defaults have been provided for you, going from zero messages all the way up to 1000.

Adding Categories and Mailing Lists

You are now ready to add categories to your message boards. Click the Add Category button (

 Add Category

). You may merge with a Parent Category by enabling the Merge with Parent Category check box and clicking the Select button. Enter a name for the category and a description of the category. At the bottom of the form is a check box which allows you to enable the mailing list function.

The mailing list function works in concert with the message notification emails. If a user subscribes to a message board category, he or she will get emails when someone posts messages to that category. Enabling the mailing list function allows those users to simply reply to the notification messages in their email clients, and those replies will be posted to the thread automatically. This is an advanced configuration and should only be done by those with experience.

To enable this functionality, you will need a mail account for the category. Once you click the check box, a number of other options will appear.

Email Address: Enter the email address of the account that will receive the messages.

Next, there are two sections: Incoming and Outgoing. These define the mail settings for receiving mail and for sending mail. The Incoming tab has the following options:

- Protocol: Select POP or IMAP.
- Server Name: Enter the host name of the mail server you are using.
- Server Port: Enter the port on which your mail service is running.
- Use a Secure Network Connection: Check this box to use an encrypted connection if your server supports it.
- User Name: The login name on the mail server.
- Password: The password for the account on the server.
- Read Interval (Minutes): VolunteerMatters Components will poll the server at this interval looking for new messages to post.

The Outgoing section has the following options:

- Email Address: Enter the email address that messages from this category should come from. If you want your users to be able to reply to the categories using email, this should be the same address configured on the Incoming tab.
- Use Custom Outgoing Server: If you need to use a different mail server than the one that is configured for the portal, check this box. If you check the box, a number of other options will appear.
- Server Name: Enter the host name of the SMTP mail server you are using.
- Server Port: Enter the port on which your mail service is running.
- Use a Secure Network Connection: Check this box to use an encrypted connection if your server supports it.

- User Name: Enter the login name on the mail server.
- Password: Enter the password for the account on the mail server.

When finished adding your category, click Save. Add as many categories to your message boards as you wish.

Note that categories can have subcategories. You can add a number of top-level categories and then click on each one and add categories under that, to an unlimited level. For usability reasons, you don't want to nest your categories too deep, or your users will have trouble finding them. You can always add more categories as your message boards grow.

Using the Message Boards

Upon seeing VolunteerMatters Components' Message Boards portlet, your users will immediately recognize that the interface is similar to many other implementations they've seen before. Message boards are nothing new to the Internet, and many people have been using them for quite a long time. For that reason, VolunteerMatters Components' message boards will seem very familiar to your users.

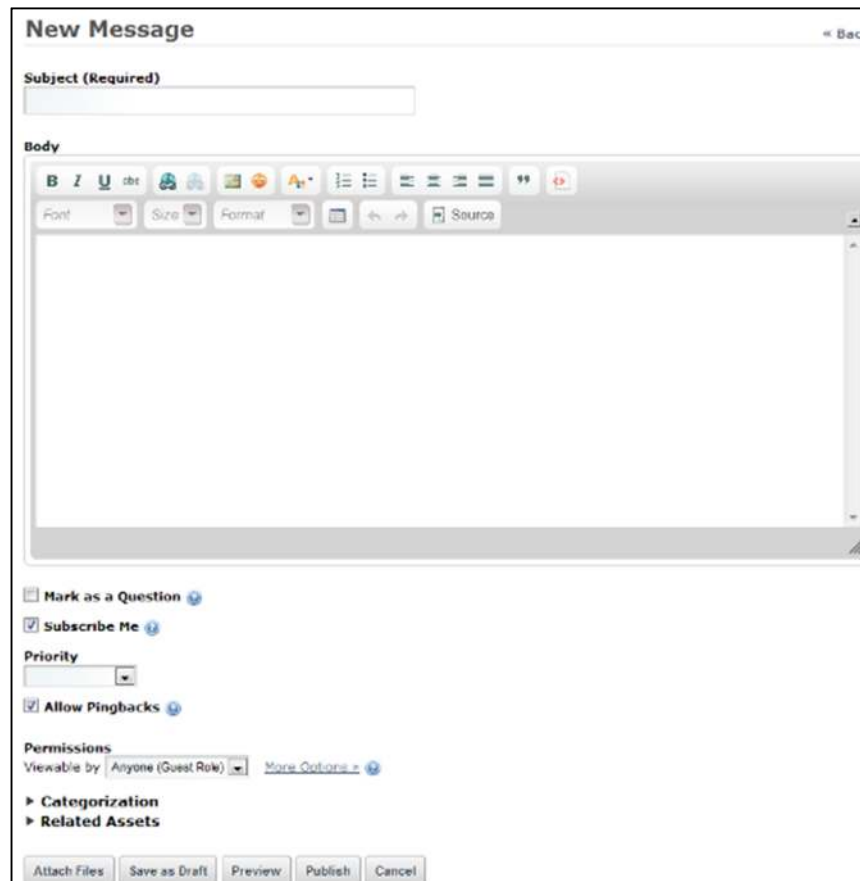
Threads can be viewed in many ways. At the top of the portlet is a set of tabs: Recent posts, My Posts, My Subscriptions, and for administrative users, Statistics and Banned Users. The Recent Posts tab shows all posts from all categories by date, so you can keep up on all the most recent discussions in the message boards. The My Posts tab shows all of the posts for the user that is currently logged in. This is a convenient way to get back to a previous conversation in order to retrieve some pertinent information. The My Subscriptions tab allows a user to manage thread subscriptions. If you lose interest in a particular topic, you may want to visit this tab and unsubscribe from a thread.

For administrators, the Statistics tab shows the number of categories, the number of posts, and the number of participants in your message boards. It also has a list of who the top posters to your message boards are. The Banned Users tab shows all of the users who have been banned from posting on the message boards.

Posting New Threads

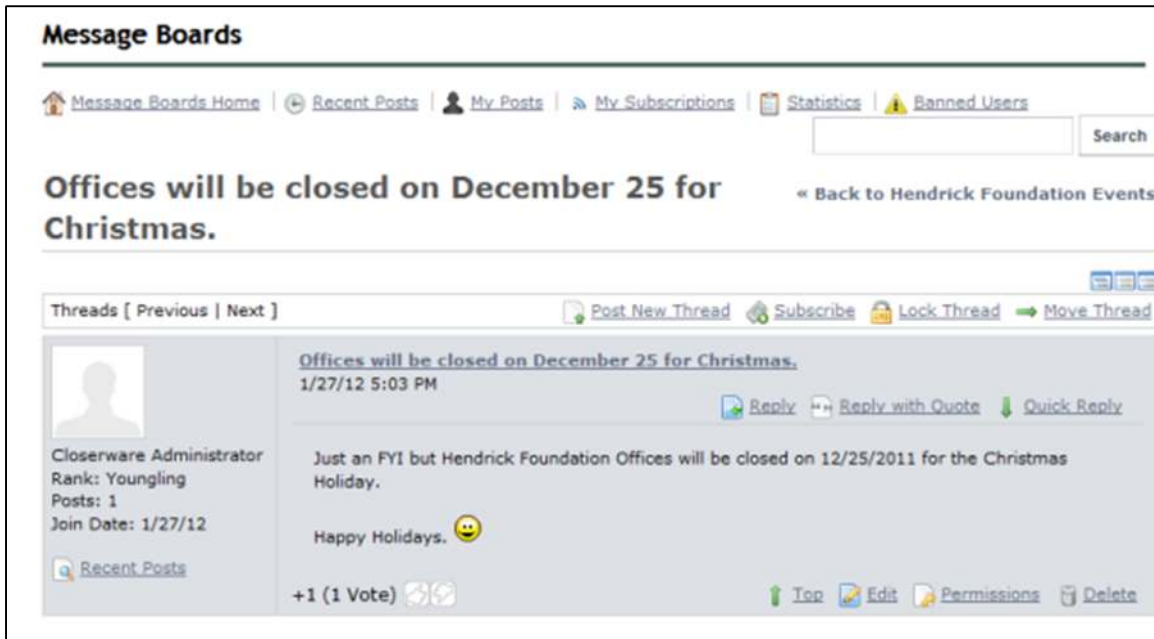
To post a new thread, select the “Post New Thread” button (). You will see a message editing form. The body field on this form is different from that of the other portlets in VolunteerMatters Components. The reason for this is to support BBCode, which is a standard form of markup used in many message board products. Before BBCode was invented, many message board products would allow users to enter HTML to format their messages. This, however, enabled attackers to insert malicious code into the message board. BBCode was invented to provide users a way of formatting their messages without allowing them to enter HTML. Similarly, VolunteerMatters Components supports BBCode in the message board’s portlet because the other editor—which is used for the Content Management System, the Blogs portlet, and other portlets—produces HTML. This is appropriate for those other portlets, as they are only used by privileged users, but it is not appropriate for the message boards. Besides this, many users of message boards are familiar with BBCode and are used to it, and the editor that is provided for VolunteerMatters Components’ Message Boards portlet makes it very easy to use.

Please Note: HTML is available for the Boards if desired.



Messages that are posted to the message boards are shown by default in a threaded view so that replies are attached to the proper parent message. This makes it easy to follow along with conversations.

When viewing a message board thread, users are given several options. At the top right of the thread are three icons, allowing users to view threads in a flat view, in a tree view, or in a combination view.



A flat view shows all of the messages in the order in which they are posted. A tree view shows all of the messages in a threaded view, so that replies are next to the messages they are replying to. A combination view shows the threads at the top as subjects only, with the flat view underneath.

When viewing a thread, users can click links allowing them to post a new thread, subscribe to the thread they are viewing, or if they have administrative access, lock a thread or move a thread to another category. Subscribing to a thread causes VolunteerMatters Components to send the user an email whenever a new message is posted to the thread. If you have enabled the mailing list feature for the category in which the thread resides, users can simply reply to these messages in order to post back to the thread, without having to visit your site.

Message Board Administrative Functions

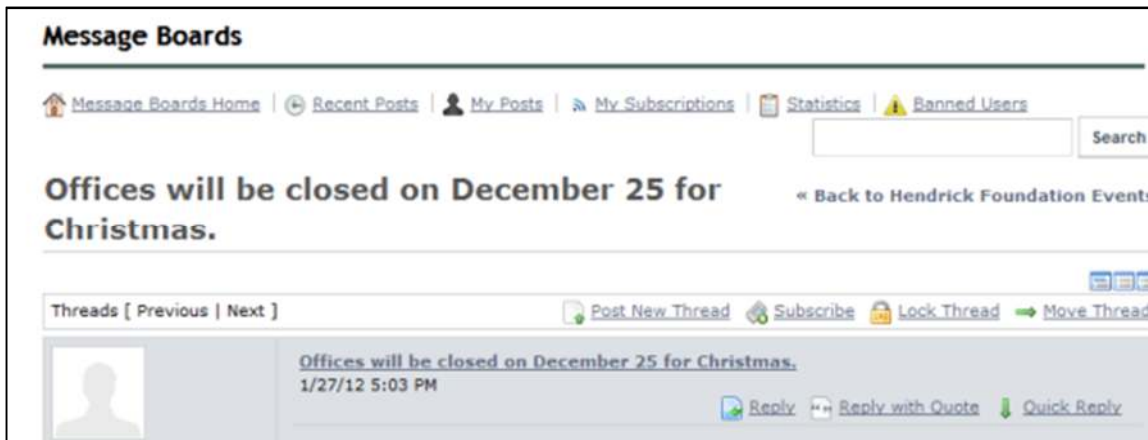
The Message Boards portlet provides for the day to day administration of the message threads. Message Board administrators can perform all of the functions we have already presented, including creating and deleting categories and posting threads. In addition to these, a number of other functions are available.

Moving Threads

Many times a user will post a thread in the wrong category. Administrators may in this case want to move a thread to the proper category. This is very easy to do. You can select the Action menu (




) to the right of the thread and then select Move Thread. Or, if you are already viewing the thread and you have administrative access, there is a link at the top of the thread labeled Move Thread:



Click this link. You will be presented with a simple form which allows you to select a category to which to move the thread and a check box which allows you to post a message explaining why the thread was moved. This message will be posted as a reply to the thread you are moving. When finished, click the Move Thread button and the thread will be moved.

Deleting Threads

Users with administrative access to the message boards can delete threads. Sometimes users begin discussing topics that are inappropriate or which reveal information which should not be revealed. In this case, you can simply delete the thread from the message boards. This is easy to do. First, view the

list of threads. Next to every thread is an Actions button (). Click Actions → Delete to delete the thread. This does not prevent users from re-posting the information, so you may need to be vigilant in deleting threads or consider the next option.

Banning Users

Unfortunately, sometimes certain users can become abusive. If you wind up with a user like this, you can certainly make attempts to warn him or her that the behavior he or she is displaying is unacceptable. If this does not work, you can ban the user from posting on the message boards.

Again, this is very easy to do. Find any post which was written by the abusive user. Underneath the user's name / profile picture is a link called Ban this User. Click this link to ban the user from the message boards.

If after taking this action the user apologizes and agrees to stop his or her abusive behavior, you can choose to reinstate the user. To do this, click the Banned Users tab at the top of the Message Boards portlet. This will show a list of all banned users. Find the user in the list and click the Unban this User link. (see image below)

Splitting Threads

Sometimes a thread will go on for a while and the discussion completely changes into something else. In this case, you can split the thread where the discussion diverges and create a whole new thread for the new topic. Administrative users will see a Split Thread link on each post. To split the thread, click the link. You will be brought to a form which allows you to add an explanation post to the split thread. Click Ok to split the thread. (see image below)

Editing Posts

Administrative users can edit not only their own posts, but also everyone else's. Sometimes users will post links to copyrighted material or unsuitable pictures. You can edit these posts, which allows you to redact information that should not be posted or to censor profanity that is not allowed on your message boards. (see image below)



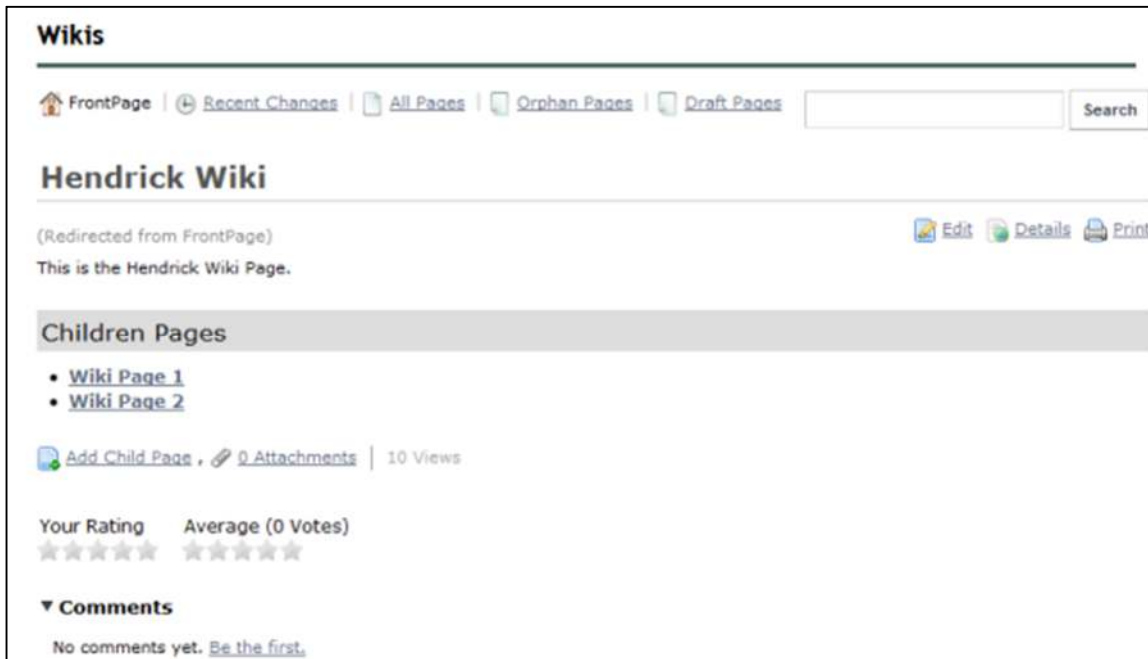
Wikis

VolunteerMatters Components' Wiki portlet, like the Message Boards portlet, is a full-featured wiki application which has all of the features you would expect in a state of the art wiki.

So what is a wiki? Put simply, a wiki is an application which allows users to collaborate on information. This, of course, has many applications—the most famous of which is Wikipedia, which is a full encyclopedia developed collaboratively by users from all over the world, using a wiki.

A wiki application allows users to create and edit documents and link them to each other. To accomplish this, a special form of markup is used which is sometimes called wikitext. Unfortunately, the proliferation of many different wiki applications resulted in slightly different syntax for wikitext in the various products, as each new wiki tried to focus on new features that other wikis did not have. For that reason, a project called WikiCreole was started. This project resulted in the release of WikiCreole 1.0 in 2007, which is an attempt to define a standard wiki markup that all wikis can support.

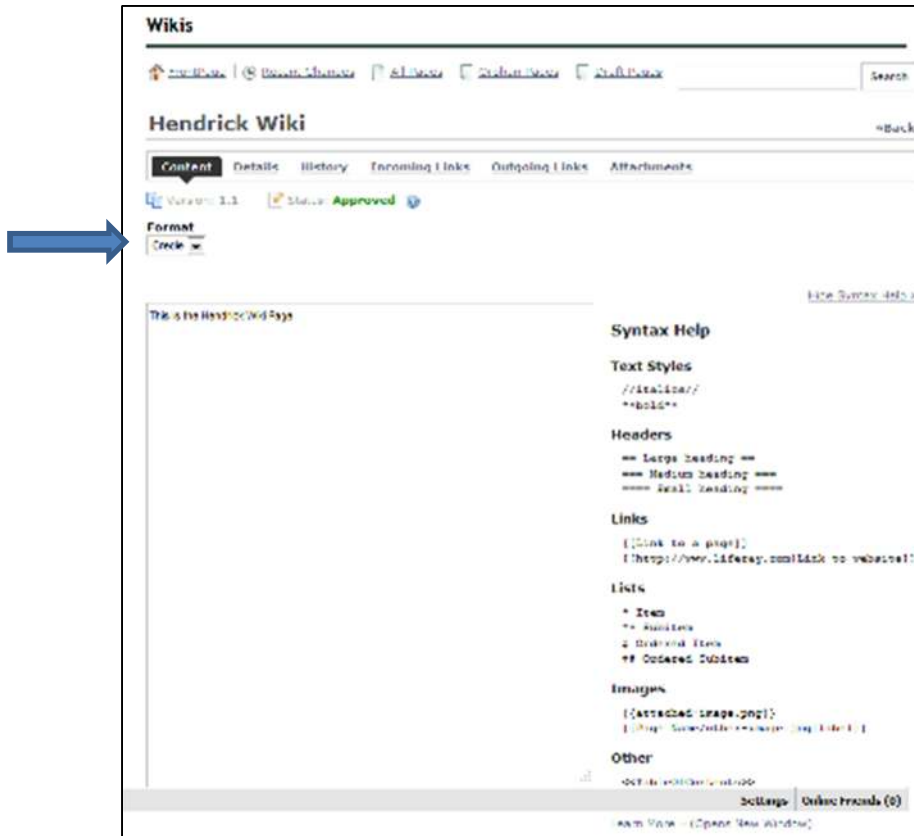
Rather than define another wikitext syntax, VolunteerMatters Components' Wiki portlet supports WikiCreole as its syntax. This syntax is a best-of-breed wiki syntax and should be familiar to users of other wikis. The portlet provides a handy cheat sheet for the syntax on the page editing form, with a link to the full documentation if you wish to use some of WikiCreole's advanced features.



The screenshot displays the VolunteerMatters Wiki portlet interface. At the top, there is a navigation bar with links for [FrontPage](#), [Recent Changes](#), [All Pages](#), [Orphan Pages](#), and [Draft Pages](#), along with a search box. Below this, the page title is **Hendrick Wiki**, with a note indicating it is redirected from FrontPage. Action icons for [Edit](#), [Details](#), and [Print](#) are visible. The main content area features a section titled **Children Pages** containing a list of [Wiki Page 1](#) and [Wiki Page 2](#). Below the list, there are links for [Add Child Page](#), [0 Attachments](#), and a view count of **10 Views**. A rating section shows **Your Rating** and **Average (0 Votes)** with five star icons. At the bottom, there is a **Comments** section with the text **No comments yet. Be the first.**

Adding and Editing Wiki Pages

By default, there is one page added to your wiki, called FrontPage. To get started adding data to your wiki, click the Edit link at the top right of the portlet. You will be brought to a blank editing page.

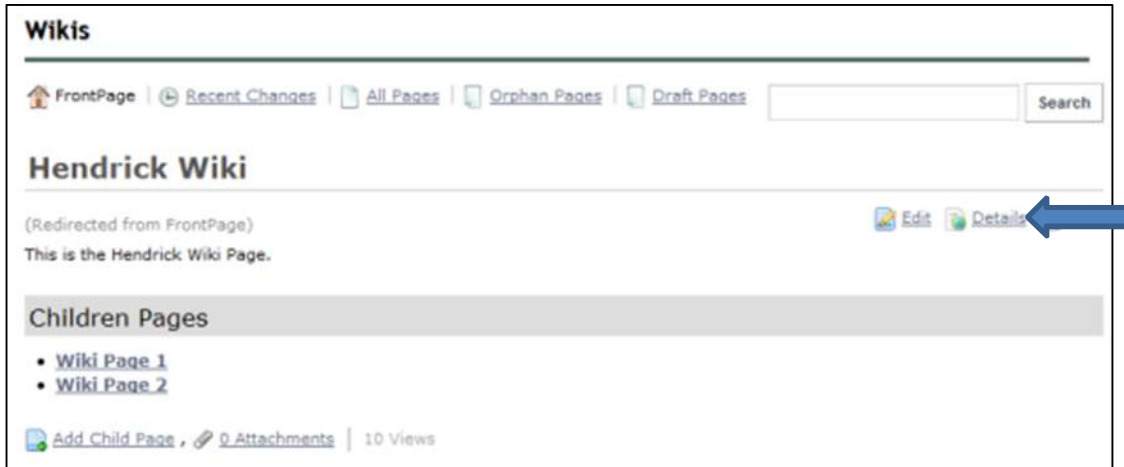


Note that at the top of the screen you can select from the Creole wiki format and the HTML editor that comes with VolunteerMatters Components. The Creole format is a much more advanced editor and generally recommended for wikis as it allows for a much cleaner separation of content and code. However, you should be fine using the HTML Editor.

At the bottom of the page editing screen, you can select Categories and Tags for the article.

Page Details

When viewing a page, you can view its details by clicking the Details link which appears in the top right of the page. This allows you to view many properties of the page. There are several tabs which organize all of the details into convenient categories.



Details

The Details tab shows various statistics about the page, and also contains a few actions that you can perform on the page.

- Title: Displays the title of the page.
- Format: Displays the format for the page—either Creole or HTML.
- Latest Version: Displays the latest version of the page. The wiki portlet automatically keeps track of page versions whenever a page has been edited.
- Created By: Displays the user who created the page.
- Last Changed By: Displays the user who last modified the page.
- Attachments: Displays the number of attachments to the page.
- RSS Subscription: Displays links which allow you to subscribe to the page as an RSS feed in three formats: RSS 1.0, RSS 2.0, and Atom 1.0.
- Email Subscription: Contains links allowing you to subscribe to the entire wiki or just to this page.
- Advanced Actions: Contains links allowing you to modify the permissions on the page, make a copy of the page, move (rename) the page, or delete the page.



History

This tab shows a list of all of the versions of the wiki page since it was created. You can revert a page back to a previous state and you can also compare the differences between versions by selecting the versions and then clicking the Compare Versions button.

Incoming / Outgoing Links

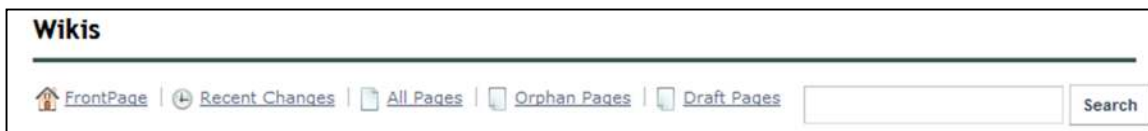
The next two tabs are for incoming and outgoing links. These are wiki links to and from the page. You can use this tab to examine how this page links to other pages and how other pages link back to this page.

Attachments

The last tab is for attachments. You can attach any file to the wiki. This is mostly used to attach images to wiki articles which can then be referenced in the text

Navigating in the Wiki Portlet

At the top of the portlet is a list of links which allow you to navigate around the wiki. Next to the Manage Wikis button is a list of wikis that are currently created in the portlet. Simply click on the wiki's name to begin browsing that wiki. After this is a set of navigation links:



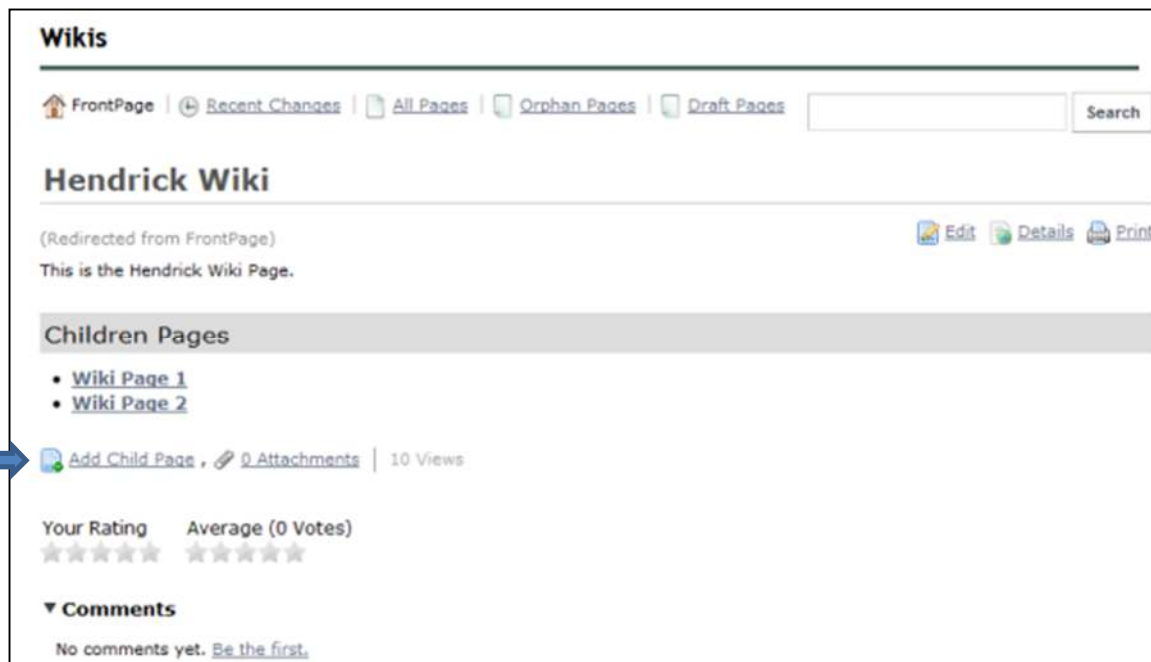
- [FrontPage](#): Takes you to the main page of the main wiki.
- [Recent Changes](#): Takes you to a page which shows all of the recently updated pages.
- [All Pages](#): Takes you to a flat, alphabetical list of all pages currently stored in the wiki.
- [Orphan Pages](#): This link takes you to a list of pages that have no links to them. This can happen if you take a link out of a wiki page in an edit without realizing it's the only link to a certain page. This area allows you to review wiki pages that are orphaned in this way so that you can re-link to them or delete them from the wiki if they are no longer relevant.
- [Search](#): Enter a term here and click the Search button to search for items in the wiki. If the search term is not found, a link will be displayed which allows you to create a new wiki page on the topic for which you searched. In general, categories start off with broad terms and eventually.

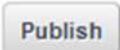
If desired we can always enter a "BreadCrumb" portlet above your Wiki portlet for even more navigation:



Adding Child Pages

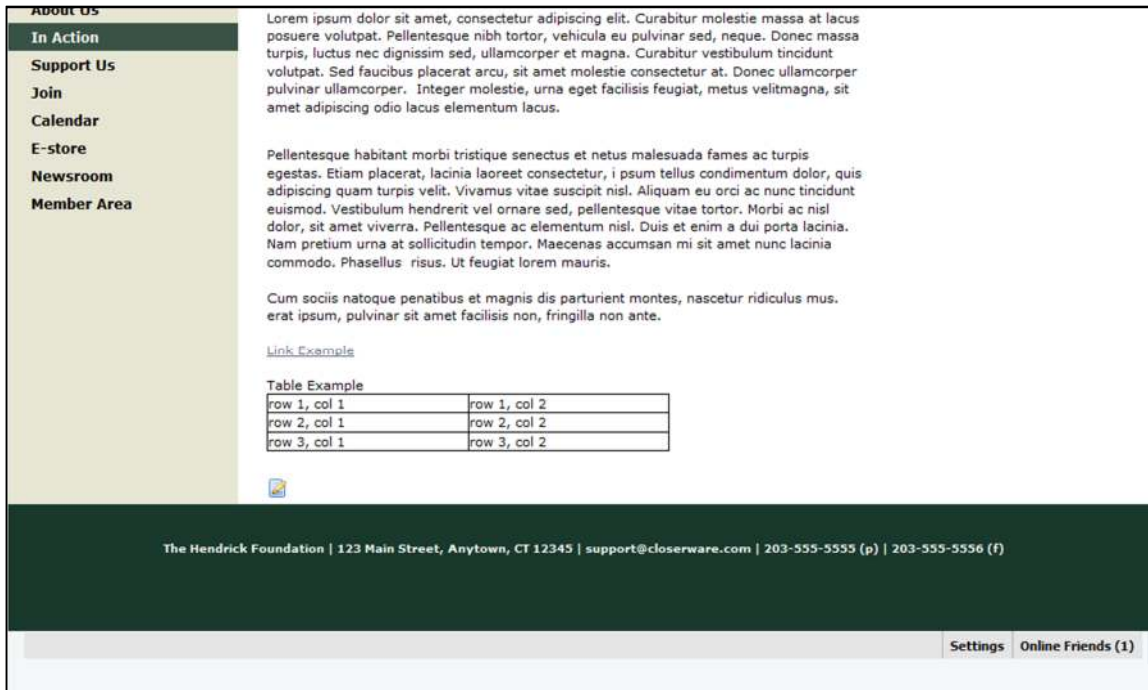
To add child pages within the Wiki, you will need to navigate to the page you wish to add a child page to and click on the "Add Child Page" link:



You will be brought to a blank editing page like we referenced earlier. Once your content has been created you will see the 'Publish' button ()

Chat

VolunteerMatters Components' Chat portlet gives you a convenient way of allowing your users to send each other instant messages when they are logged into your web site. It appears as a bar at the bottom of every page, showing who is logged on, their statuses, and any chats the logged-in user has had open.



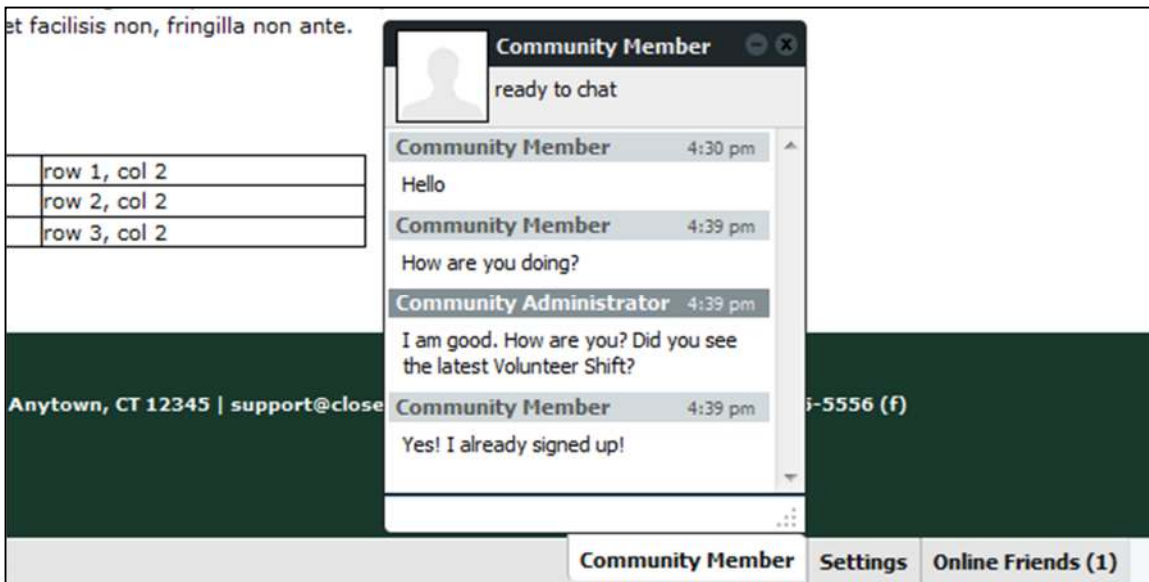
The Chat portlet is very simple to use. To change the settings, click Settings (found near the lower right corner next to Online Friends). Here you can set your status, whether to show if you are online, and whether to play a sound if someone sends you a message while you have the window or tab in the background.



The portlet shows you the number of your friends who are online. To chat with one of them, click the Online Friends link and then click the friend's name.



You can then begin chatting with him or her. You can have multiple chats open at a time, and even have one or more of them minimized.



Documents and Media

VolunteerMatters Components features a 'Documents and Media' portlet that provides one central place to aggregate and manage all your content. It is equipped with customizable folders and act as a web-based shared drive for all your team members, no matter where they are. Because content is accessible only by those authorized by the administrator, each individual file is as open or as secure as you need it to be.

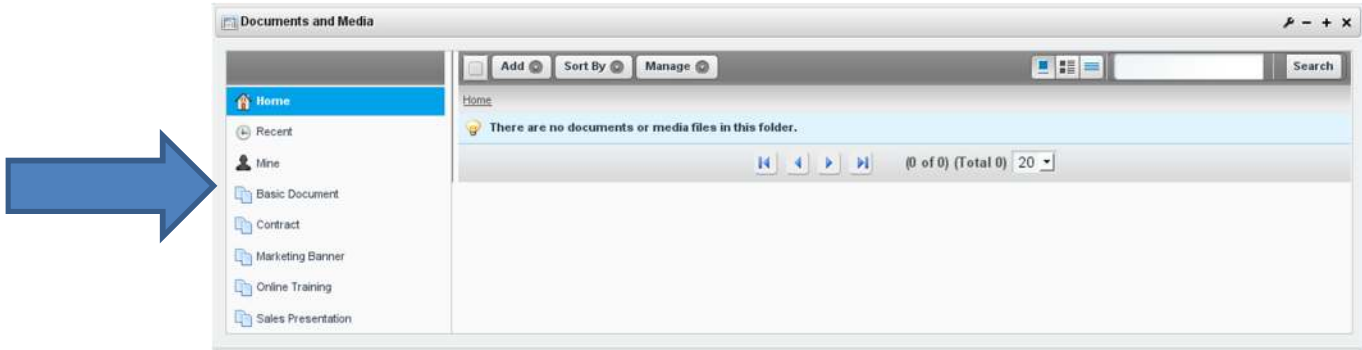
The Documents and Media portlet provides document management that can include check in/check out, meta data, and versioning features. Document file formats may be converted at the time of upload, if necessary. The Documents and Media portlet supports customizable document types and metadata sets. These document types and metadata sets are an addition to, not a replacement for, the portal's system of tags and categories.

You can add as many subfolders as you want under any folder that you have permission for. You can setup the permissions for each folder and file individually as needed. Each folder and file has an individual WebDAV URL, which you can use to access the file directly from your local machine without having to log in via a web browser. If that file is protected with permissions, then user is asked for credentials with prompt.

You can choose the scope of the document library. It can be for the entire site or current page. If it is for the entire site, then the document library is site wide, but if you choose current page, then that document library is related to that current page only. Scope settings must be configured by Closerware Support or an administrator with the Site Page Manager role.

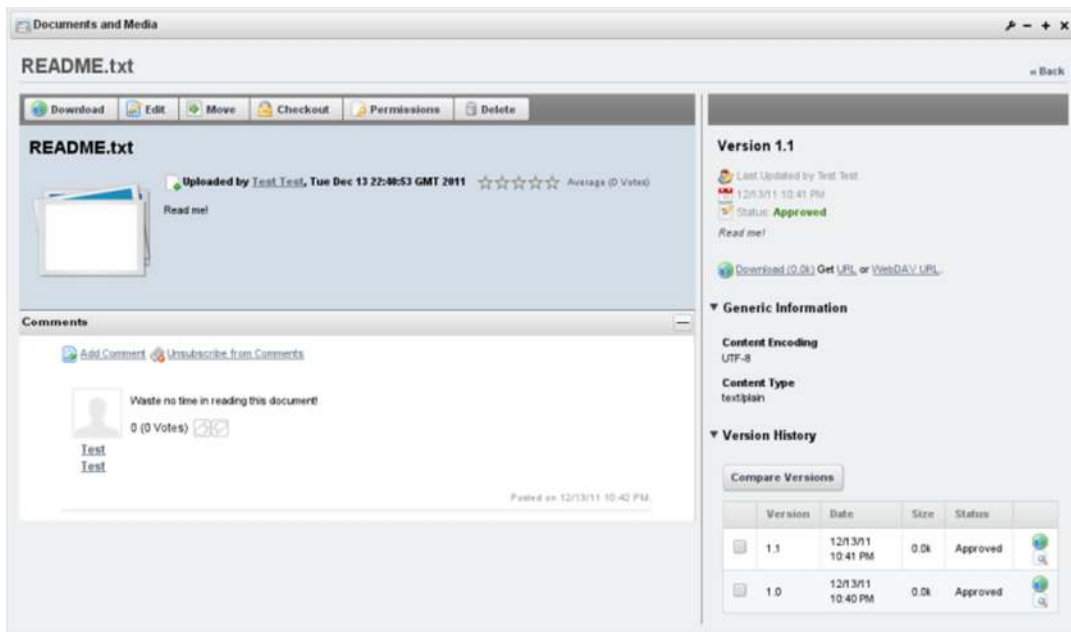
For ease of use document libraries are implemented as entire site with folder structure defining the "Root Folder" to that being the one that belongs to page the library is on. This allows the files uploaded to that folder to be used when editing content and adding file download links. If this wasn't done you would have to upload files twice. Once for the document library (that was scoped to the current page) then again the library that is scoped site wide (which the HTML editor utilizes when editing web content).

The default view of the Documents and Media portlet displays the contents of the Home folder. The links on the left side of the portlet windows are filters. You can use these filters to choose what you want the main window of the portlet to display. Recent Documents displays documents that users have recently used. For example, recently uploaded, edited, or downloaded documents are displayed here. My Documents shows your documents; in other words, the documents that you have uploaded. Basic Document and the document types listed below it are also filters. If you click on one of these filters, the main portlet window shows only documents that belong to the selected document type. When you add custom Document types, which we discuss below, they are added to the filter list.



Getting Around the Documents and Media Portlet

In the main window of the Documents and Media portlet, you can click on a document to view details about it. Its version number, version history, status, and content type will be displayed as well as its uploader and the user who last edited it. You can perform several actions on the document here. You can edit the document to change its contents, point it to a different file, change its title, description, or document type, or add tags, categories, or related assets. You can move the document to a new location. You can checkout the document to prevent other users from modifying the document while you are working. You can configure the file-specific permissions of the document. You can download the document or get its URL or Webdav URL. If comments are enabled, you can view comments, add comments, or subscribe to comments about this document.



The menu at the top of the Documents and Media portlet contains **Actions, Add, Sort By, and Manage** buttons. There are also buttons for switching between icon view, descriptive view, and list view and there is a search field. If your portlet contains more documents than it can display at once, you can use the navigation tool at the bottom of the portlet window to either switch your view to another page or configure the page to display more documents per page.



Actions

The Actions menu will only be displayed if you have selected one or more documents with the check boxes.

Cancel Checkout: lets you check in a document that you had checked out but did not make any changes to. Using this option will prevent the Documents and Media portlet from incrementing the document's version number and saving an identical version of the document.

Checkin: lets you check in a document that you have edited. Its version number will increment and the previous version will be saved.

Checkout: lets you check out a document that you would like to edit. This option prevents anyone else from modifying it while you are working. Other users can still view the current version of the document if they have permission. When you are done working on the document you can check it back in.

Move: allows you to choose a new location for a document or folder within the portlet's file system. You can move multiple documents and folders at the same time. Moving documents and folders is also possible via drag & drop.

Delete: allows you to remove a document or folder from the portlet. You can delete multiple documents and folders at the same time.

Add

From the Add button, you can add documents, folders, and shortcuts just like on your local file system.

Folder: lets you create a new location in your portlet's file system.

Shortcut: allows you to create a shortcut to any document that you have read access for. You can set permissions on the shortcut to specify who can access the original document through the shortcut.

Repository: This option allows you to add an entirely new repository to your Documents and Media portlet. To do this you need to specify the repository type and choose an ID. If you are using the AtomPub protocol you'll also have to specify the AtomPub URL. This is advanced usage and will most likely not be used.

Multiple Documents: allows you to upload several documents at once.

Basic Document: allows you upload a single file that you would like the default document type, "Basic Document," to apply to. By default, basic documents are not described by any metadata sets.

The remaining items in the Add menu are default document types that are each described by a unique metadata set. When you add a document belonging to a specific document type, you're presented with a form to not only specify the file to upload but also to fill out the fields defined by the document type's metadata set. We describe the "Contract" document type by way of example.

Contract: lets you upload a file that you would like the "Contract" document type to apply to. This document type is intended to be used to describe legal contracts. By default, contracts are described by effective date, expiration date, contract type, status, legal reviewer, signing authority, and deal name fields. Document types are discussed below.

Any custom documents types that have been defined also appear in the Add menu. If a document type has been created that matches the document you would like to upload, you can select that document type from the Add menu. This will associate the metadata fields associated with the document type to your document and you will be asked to fill out the fields.

Sort By

You can sort the items displayed in the main window of the Documents and Media portlet using the Sort By menu. You can sort by title, create date, modified date, read count, or size.

Title: lets you alphabetically sort documents by title.

Create Date: lets you sort documents by the time they were created.

Modified Date: lets you sort documents by the last time they were modified.

Read Count: lets you sort documents by the number of times they were viewed.

Size: lets you sort documents by how much disk space they use.

Manage

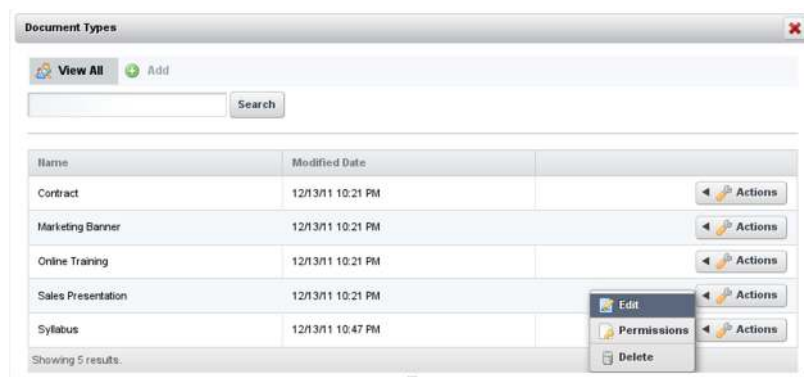
The Manage menu allows you to view the names of document types and metadata sets, as well as the last times they were edited.

Document Types: shows you a list of defined document types.

Metadata Sets: shows you a list of defined metadata sets as well as their portal IDs.

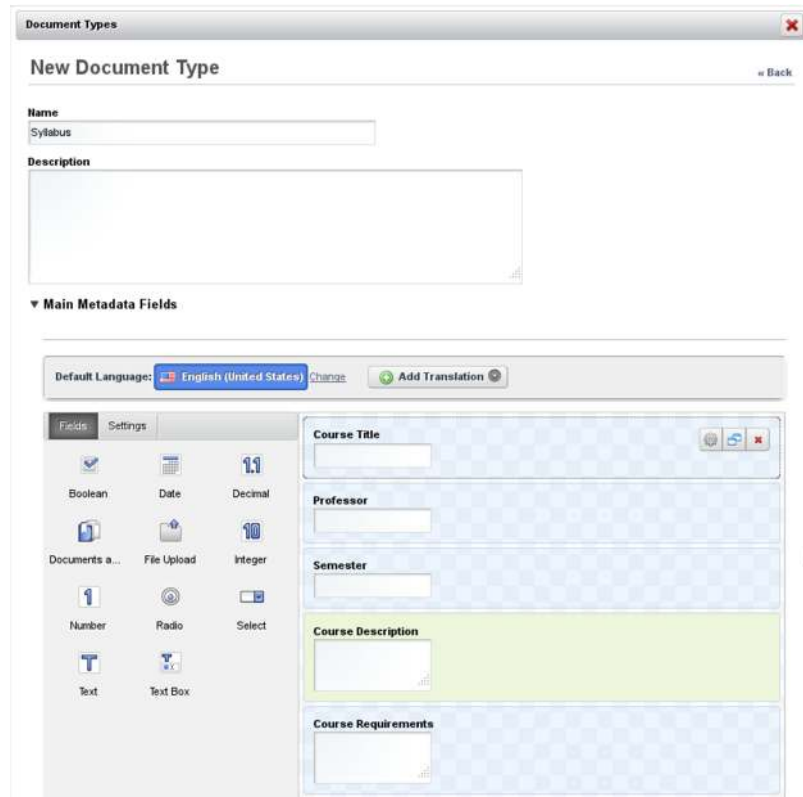
Document Types and Metadata Sets

Customizable document types and metadata sets are features in the new Documents and Media portlet. When a user assigns a document type to a document, the user is required to fill out the fields defined by the metadata set of the document type. This helps encourage users not to forget to enter important information about their documents. For example, you could create a "copyrighted" document type and require users to enter a license for all "copyrighted" documents. More importantly, document types and metadata sets can improve document searchability. The values that users enter into the fields determined by their document type's metadata set become searchable entities within the site. Document types and metadata sets are accessible from the Manage Button at the top of the Documents and Media portlet window.



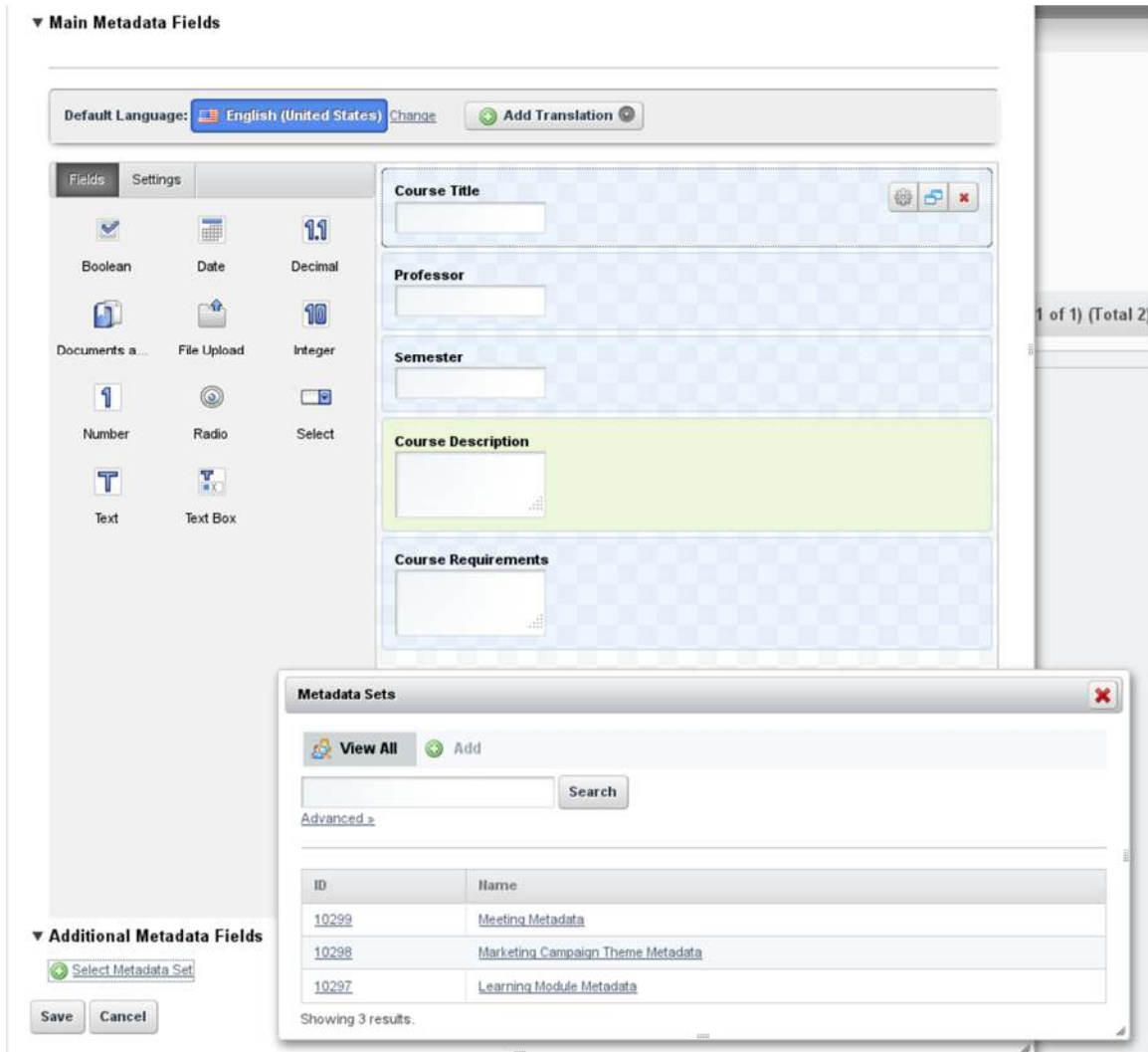
Document Types Dialog Box

You can add a new document type using the Add button at the top of the dialog box. To do so, you need to define one or more metadata sets to associate with your document type. When creating a new document type, you can define "Main Metadata Fields" or select "Additional Metadata Fields". Main metadata fields are directly tied to their document type and cannot be made available to other document types. Additional metadata fields, by contrast, can be defined independently and can be used in many different document types. You can differentiate the document types that implement the same additional metadata set by defining different main metadata fields for them. However, Additional metadata fields need to be defined and saved before creating a document type that will implement them.



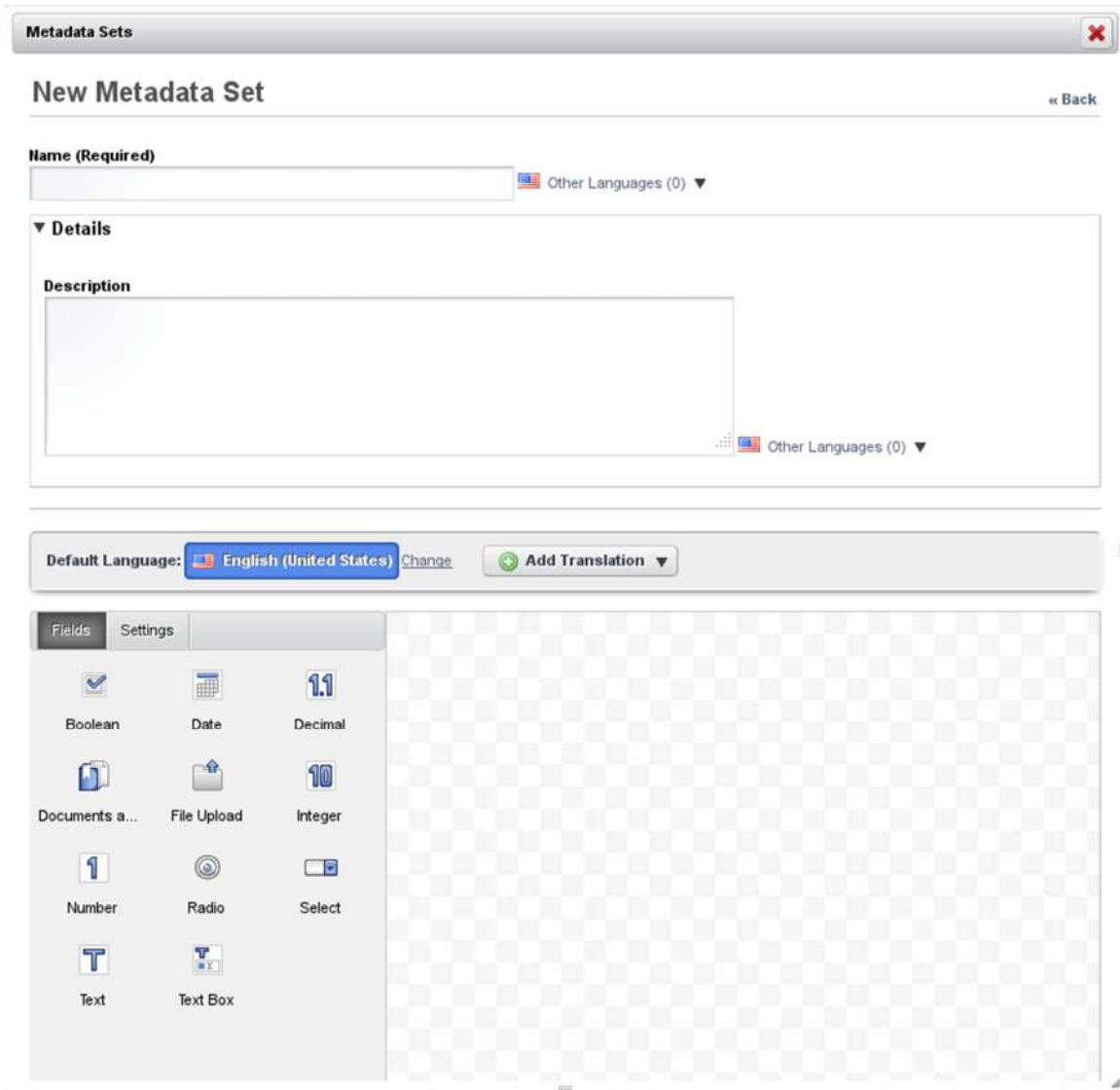
Adding a New Document Type

Let's create a document type called "Syllabus" and define a metadata set. What metadata should we associate with syllabi? Let's choose for our syllabi to have course title, professor, semester, course description, and course requirements fields. All syllabi in our portal should maintain entries for these fields. This ensures that a syllabus will show up in a portal search if its course title, professor, or semester is searched for. Since we don't want to use our metadata set for any document type other than "Syllabus," let's create our metadata set under the Main Metadata Fields area. Alternatively, we could create our metadata set independently using Manage → Metadata Sets → Add and then select it as an Additional Metadata Field.



Selecting Additional Metadata Sets

You can view, edit, or add metadata sets from the Manage → Metadata window. A metadata set consists of a group of fields. If you click the Add button, can use same UI for defining a metadata set that you used in the Add Document Type window.



Adding a New Metadata Set

Make sure the Fields tab is selected on the left. Then, to define a metadata set, just choose fields to use from the area on the left and drag and drop them into the area on the right. The drag and drop interface allows for nested fields so you need to be careful about where you drop the fields. Default values, mouse-over tips, widths, and other settings can be configured for most fields. To configure these settings, just double-click on a field from the area on the right. This automatically selects the Settings tab on the left. Then double-click on a value to edit. The Documents and Media portlet supports the following kinds of fields for metadata sets:

Boolean: is just a checkbox.

Date: lets you enter a date. A valid date format is required for the date field. However, you don't have to enter a date manually. When you select the date field a mini-calendar pops up which you can use to select a date.

Decimal: lets you enter a decimal number. The value will be persisted as a double.

Documents and Media: lets you select a file from one of the portal's Documents and Media libraries.

File Upload: lets you select file to upload from your local system.

Integer: lets you enter an integer. The value will be persisted as an int.

Number: lets you enter a decimal number or an integer. The value will be persisted either as a double or an int, depending on the type of input.

Radio: displays several clickable options. The default number is three but this is customizable. Only one option can be selected at a time.

Select: is just like the radio field except that the options are hidden and have to be accessed from a drop-down menu.

Text: lets you enter a single line of text.


Text Box: is just like the text field except you can enter multiple lines of text or separate paragraphs.

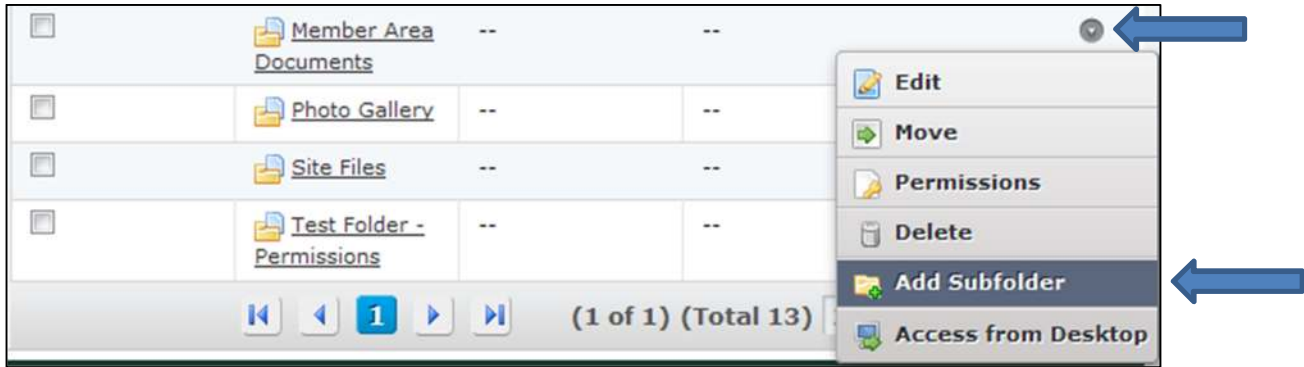
Remember that metadata sets created independently are reusable. Once they have been created they can be included in any number of document types as additional metadata sets.


Now on to the basic processes you will use often:

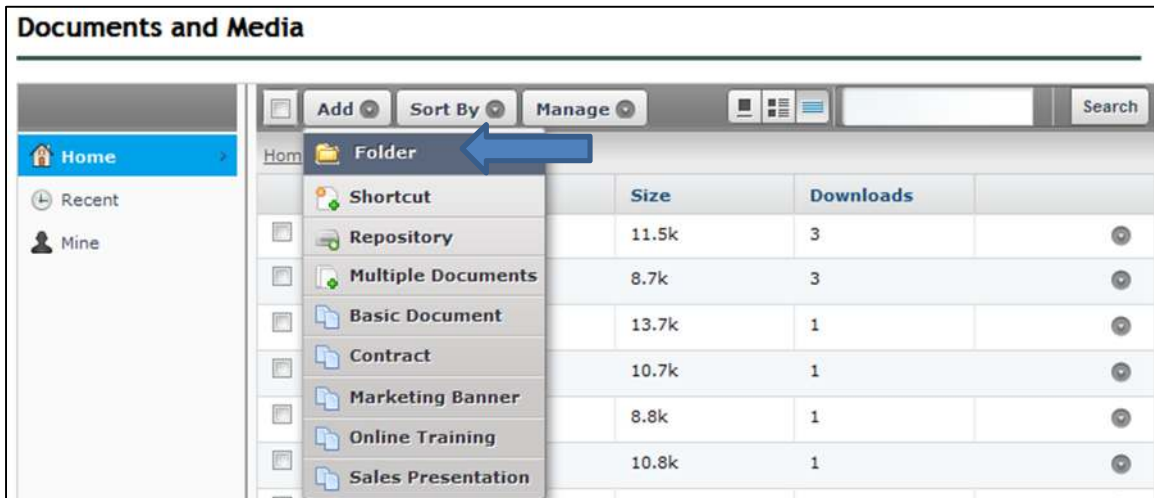
Creating Folders

To create a new folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can create folders in one of two ways:

1 – On the folder list, click the “Action” icon () next to the folder you wish to add the subfolder to and then select “Add Subfolder” when the actions list expands:




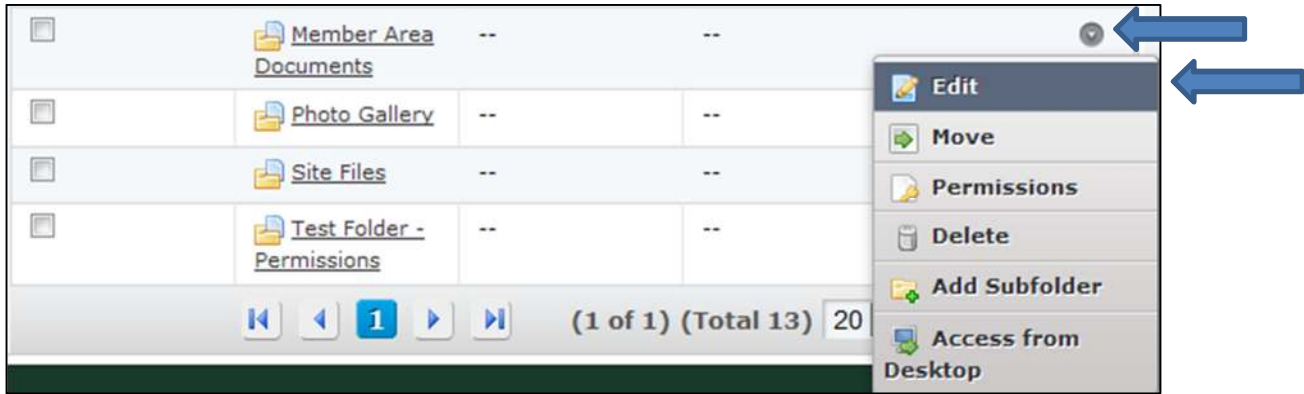
2 – Navigate to the folder you wish to add the folder to and then when in that folder click the “Add” button () at the top of the portlet and click “Folder”



Editing Folders

To edit an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can edit folders in following way:

On the folder list, click the “Action” icon () next to the folder you wish to add the subfolder to and then select “Add Subfolder” when the actions list expands:

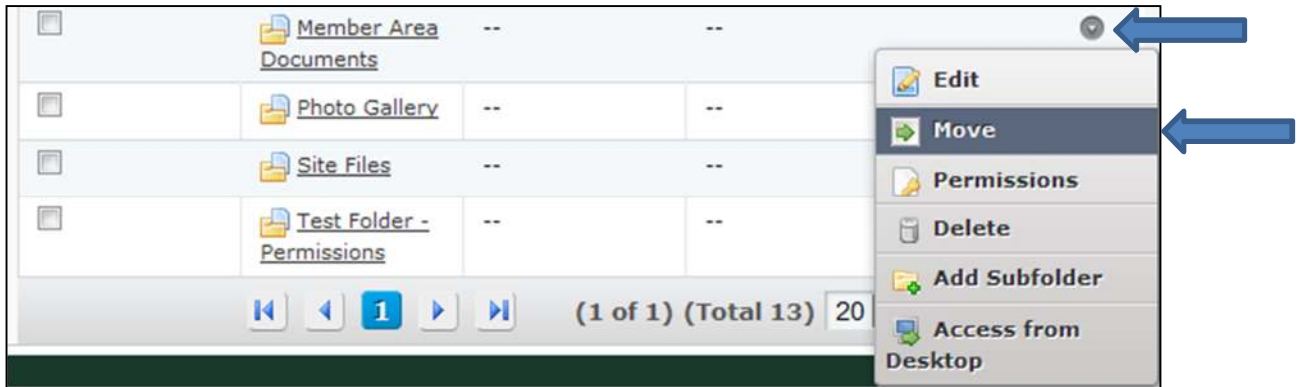


Once you are ‘editing’ the folder you can modify it’s Parent Folder, Name, and Description and then click “Save”.


Moving Folders

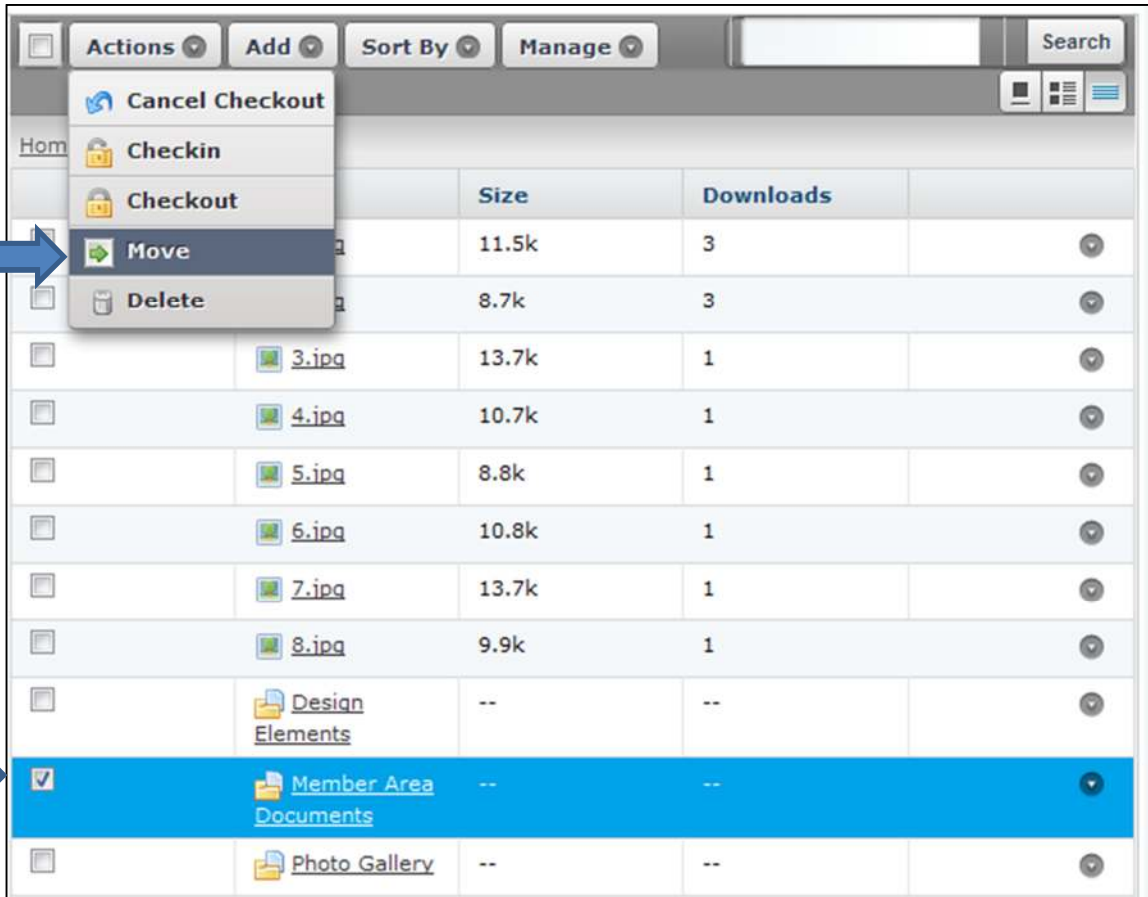
To move a folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can move folders in one of two ways:

1 – On the folder list, click the “Action” icon (⌵) next to the folder you wish to add the subfolder to and then select “Add Subfolder” when the actions list expands:



2 – When the folder you wish to move is visible in the window you can then check the box to the left of its name and this will produce the “Actions” button, then you will click on the “Actions” button (

) at the top of the portlet and click “Move”



Then click the “Select” button under “Parent Folder”:



This will open a new window which will allow you to navigate through your site folder structure and choose the folder’s location (parent folder).

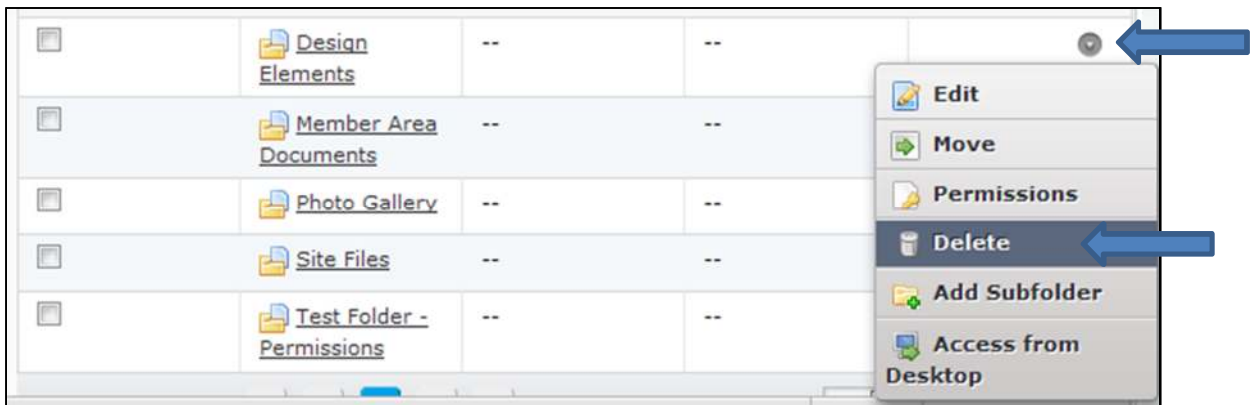
Deleting Folders*


****NOTE: IF YOU DELETE A FOLDER YOU WILL DELETE ALL OF ITS SUBFOLDERS AND FILES***

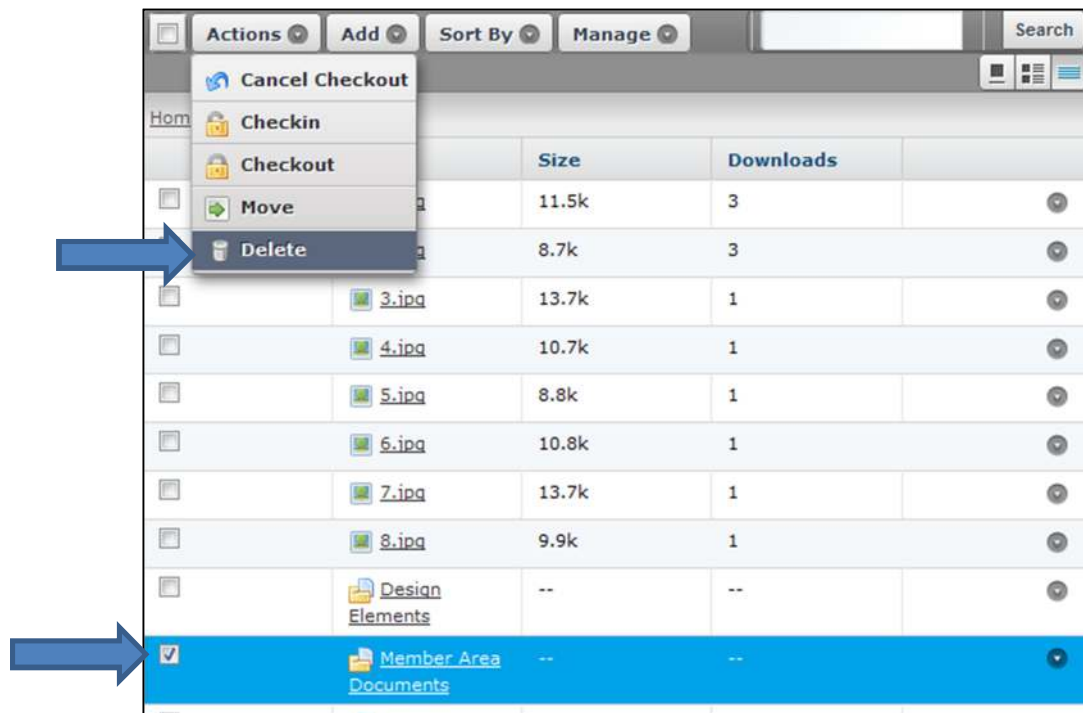
Please move any subfolders or files prior to deleting a folder if you wish to keep them!

To delete an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can delete folders in one of two ways:

1 – On the folder list, click the “Action” icon (⌵) next to the folder you wish to delete and then select “Delete” when the actions list expands:



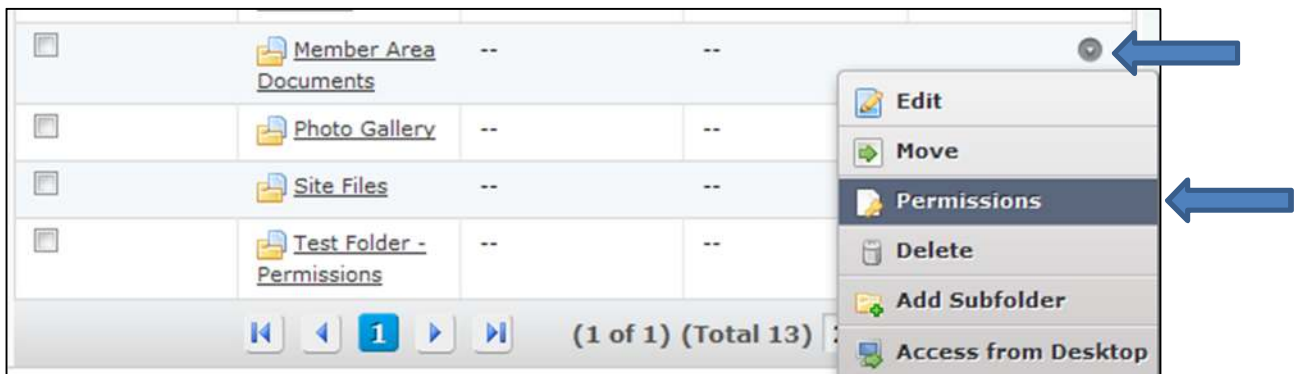
2 – When the folder you wish to delete is visible in the window you can then check the box to the left of its name and this will produce the “Actions” button, then you will click on the “Actions” button () at the top of the portlet and click “Delete”:



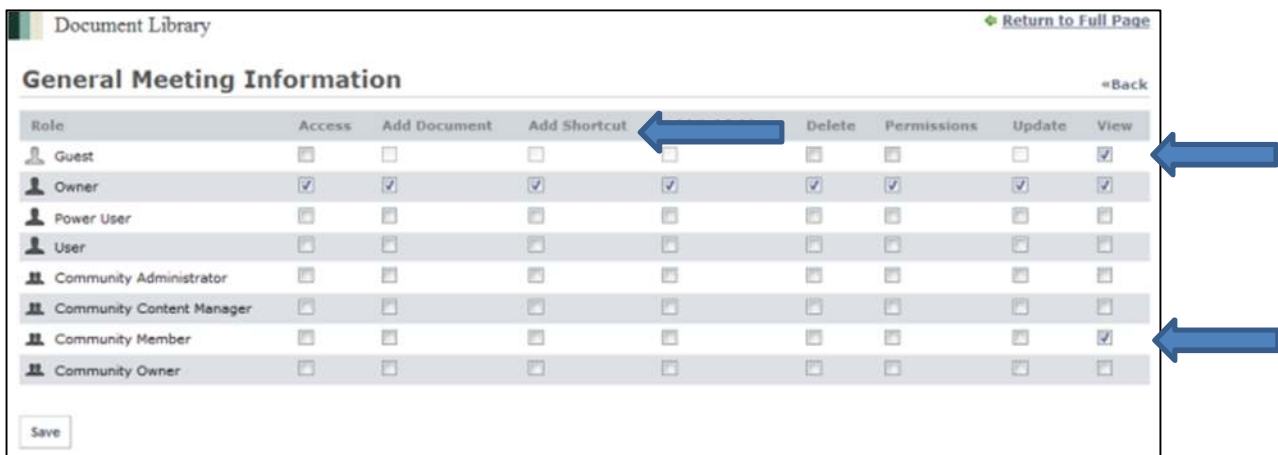
Change Permissions on a Folder

To change permissions on an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can change the permissions on folders in the following way:

On the folder list, click the “Action” icon (⌵) next to the folder you wish to change permissions on and then select “Permissions” when the actions list expands:



After you have clicked the “Permissions” button you will be presented with a grid of permission choices/options of the file that you can update:



To make a public folder, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only folder, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the folder, etc. For the most part you will only mark whether or not who can VIEW the folder. The rest of the settings will depend on the user’s built-in permissions.

Access folders via Desktop

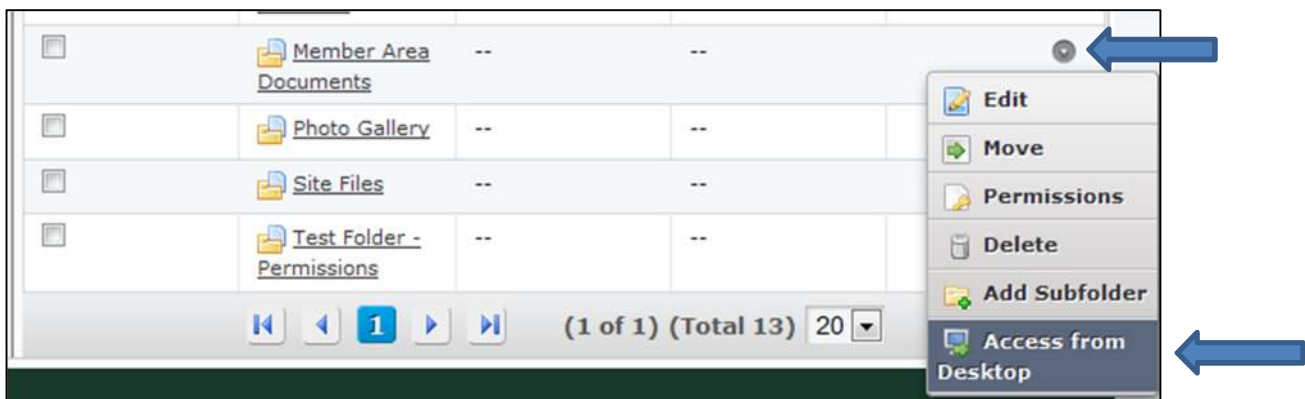
Files and folders can be managed directly from the file explorer of your desktop operating system. Before accessing from Windows, please ensure you have installed the [patch](#) from Microsoft.

The folders are accessible via WebDAV. WebDAV provides functionality to create, change and move documents on a remote server (typically a web server or "web share"). WebDAV is supported by all major Operating Systems and Desktop Environments including Windows, MacOS X and Linux (KDE and GNOME).

To utilize this functionality you will need to first obtain the WebDAV URL for the folder you wish to access.

To start you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can obtain the WebDAV URL the following way:

On the folder list, click the "Action" icon (⊙) next to the folder you wish to change permissions on and then select "Permissions" when the actions list expands:



This will open the following window with the WebDAV URL for that folder that you will then copy:

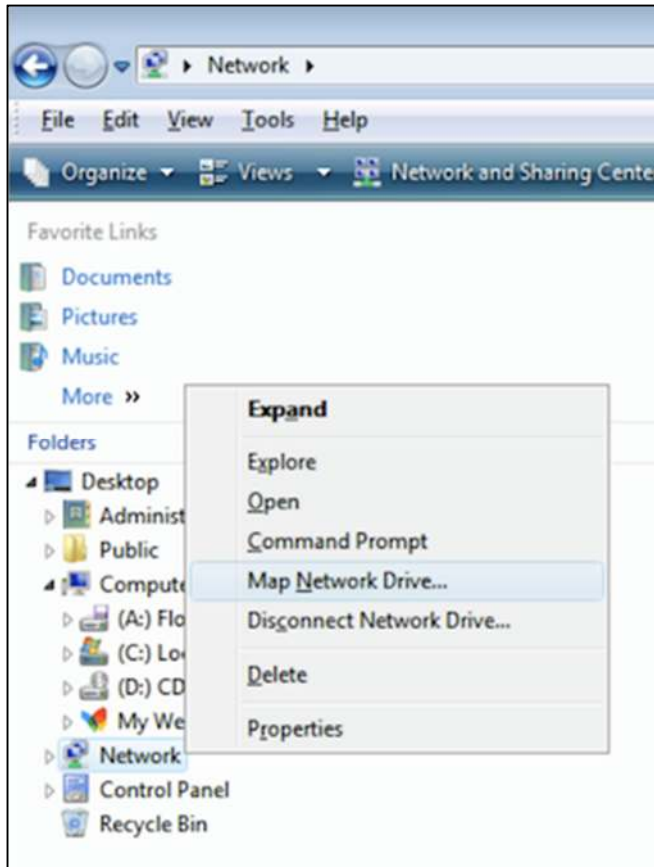


Following are specific instructions of how to configure access to the folder using WebDAV once you have the URL:

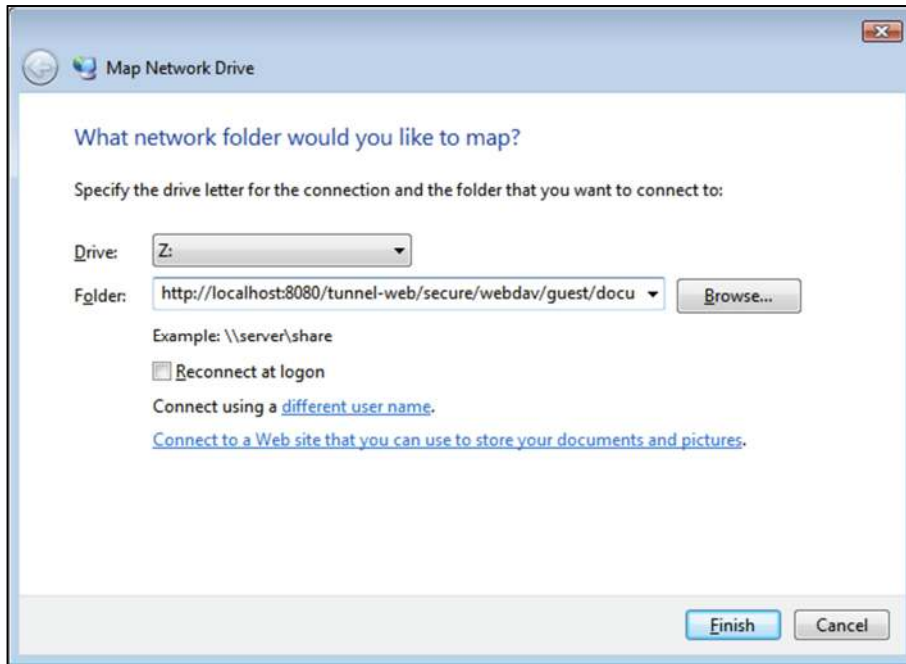
Windows

Mapping Network Drive (Vista or 7 only)

1. Right click on the Network icon and select Map Network Drive.

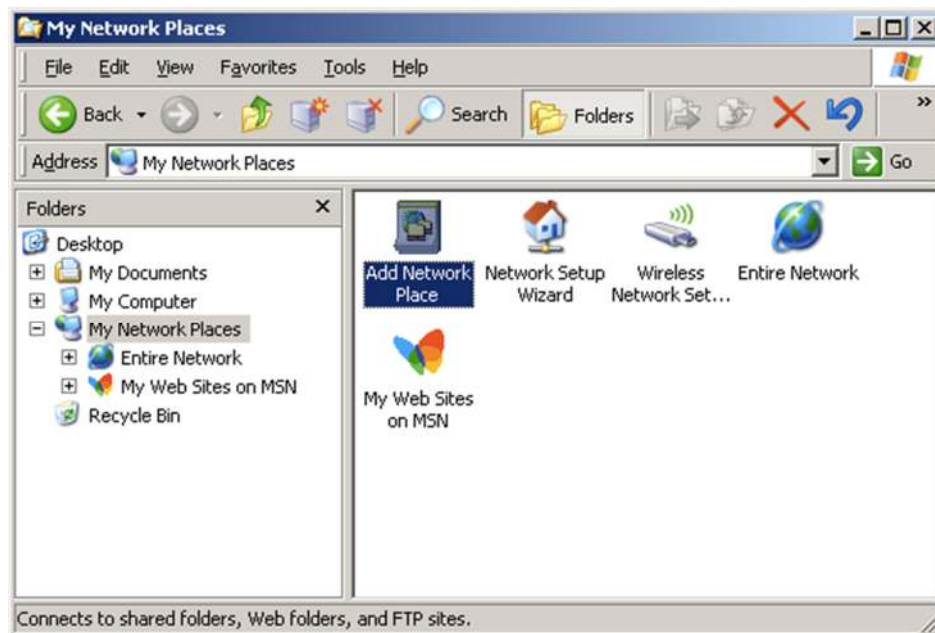


2. Select a drive and enter the WebDAV URL and click Finish. Enter credentials when prompted.

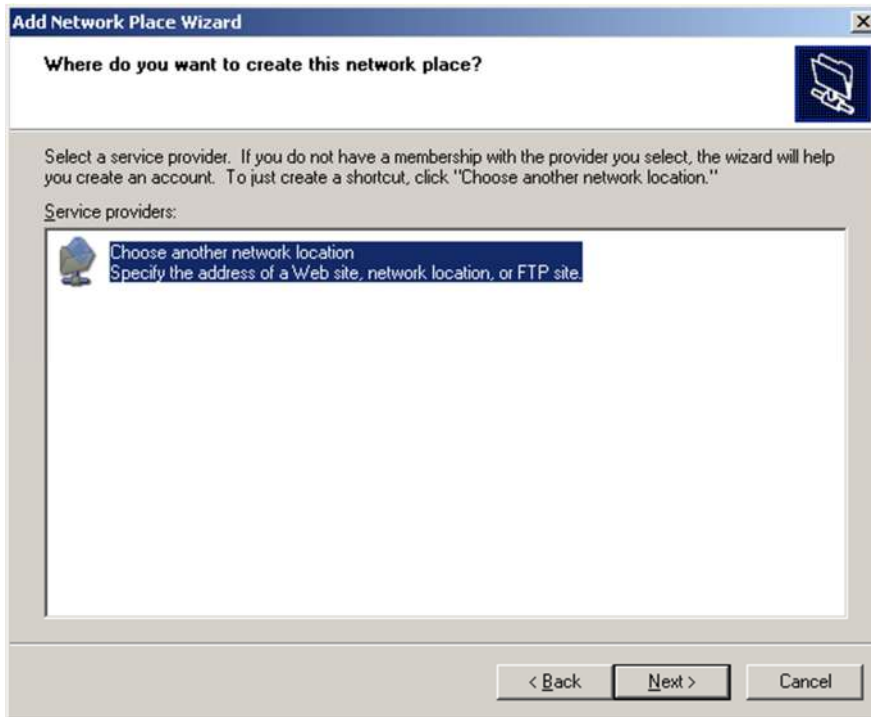


Using "Add Network Places" Wizard (XP, Vista or 7)

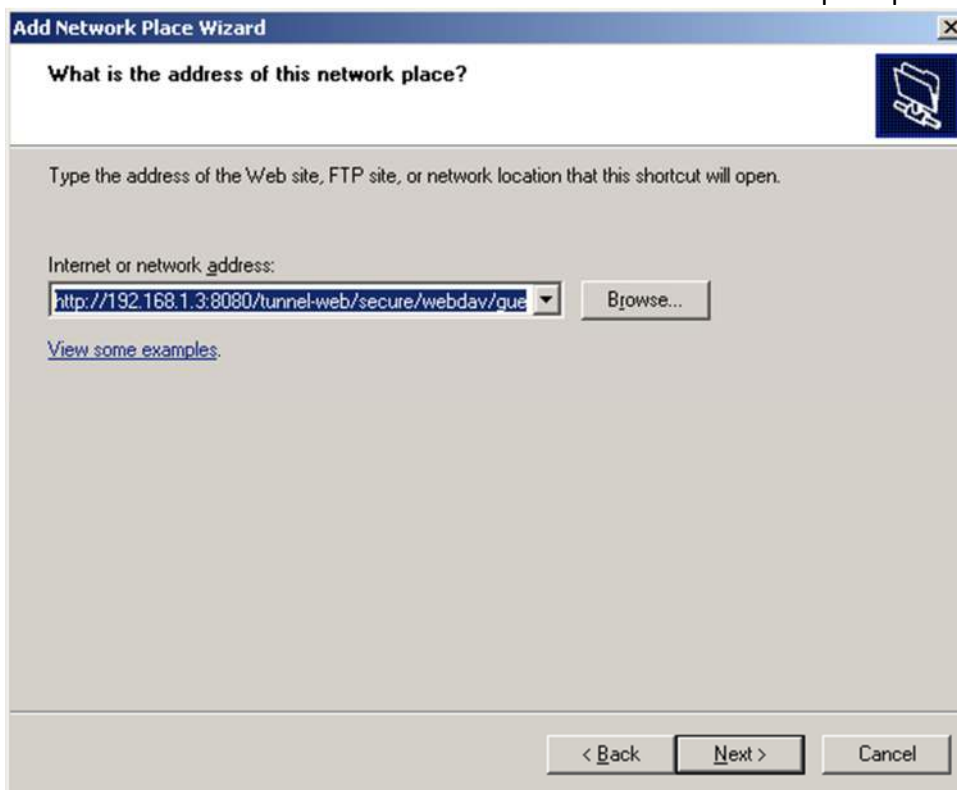
1. On Vista or Windows 7, right click on the Computer icon and select Add Network Location. On XP and Server 2003, open My Network Places in Windows Explorer and double click Add a Network Place



2. Select "Choose another network connection" and click Next.



3. Enter the WebDAV URL and click Next. Enter credentials when prompted.



Windows 98

1. Using Windows Explorer go to the menu option "Web Folder...".
2. Introduce the WebDAV URL and click enter.

Linux

Konqueror (KDE)

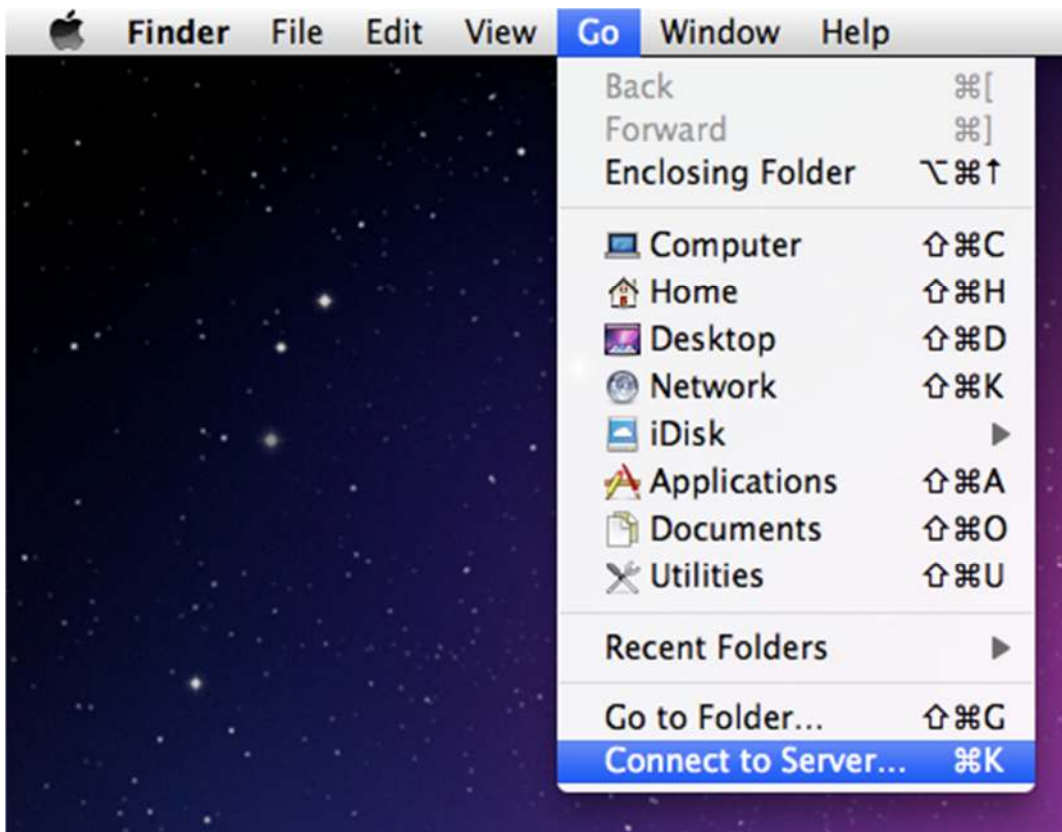
1. Change the protocol of the URL so that instead of http://... it says webdav://...
2. Write the URL in the location bar and click enter.

Nautilus (GNOME)

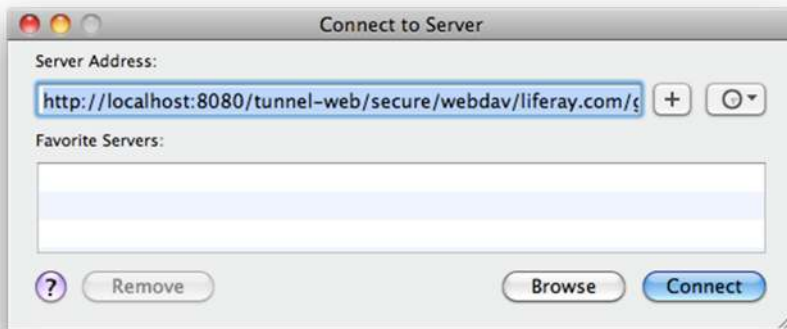
1. Change the protocol of the URL so that instead of http://... it says dav://... (davs://... when your site is using SSL).
2. Write the URL in the location bar and click enter.

Mac OS X

1. In the Finder select the menu Go->Connect to Server.



2. Type the address of the WebDAV server in the Server Address field and click "Connect". Enter credentials when prompted.




Files

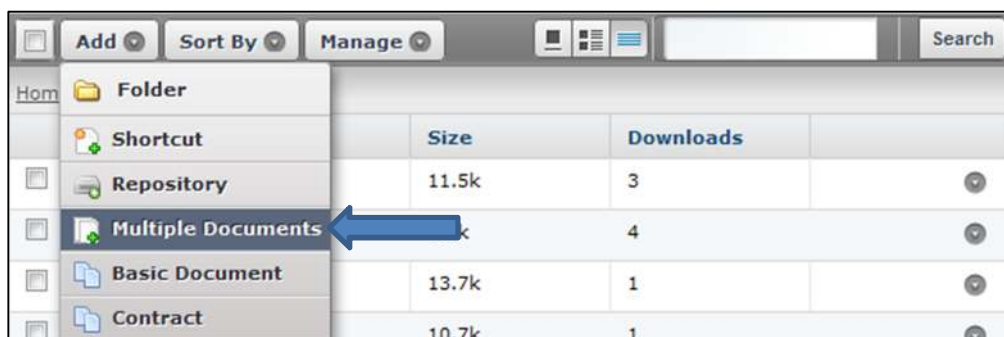
Each file will have their original name, but it is possible to change it in VolunteerMatters Components. You can also update the file and get a version history for it. Each file can have both title and description, also additional tags, Document Type, and Related Assets.

Users can also rate and comment on files. You can see both your own personal rate and average rate for the file. Each file can have WebDAV URL and HTTP URL in the same way as folders.

Adding Files

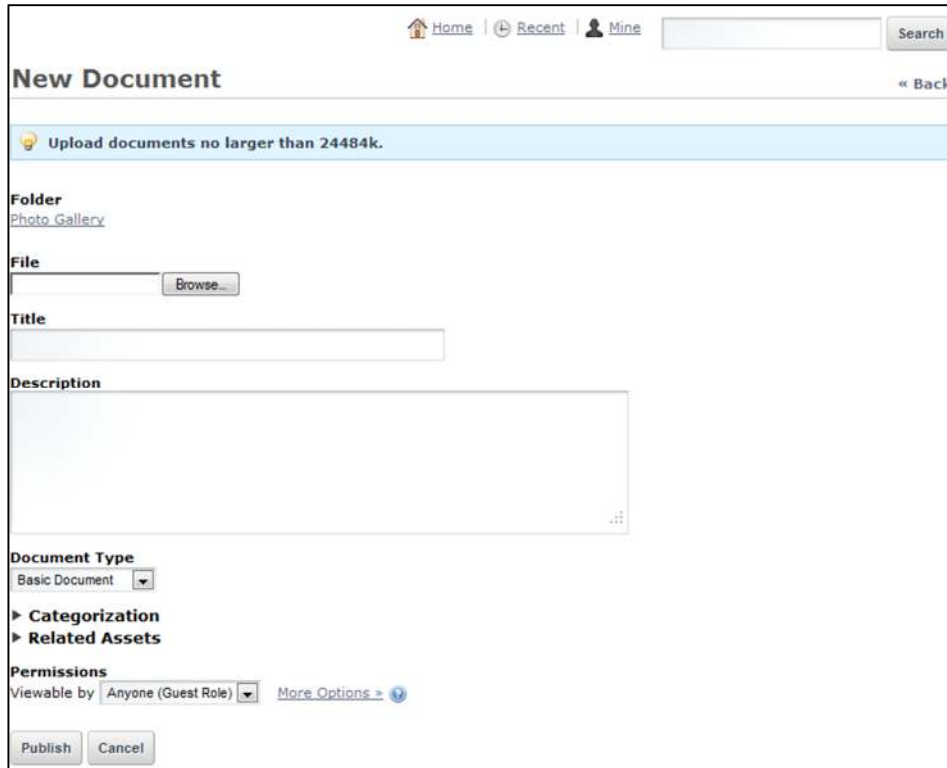
To add a new file to an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can add files to folders the following way:

Navigate to the folder you wish to add the file to and then when in that folder click the "Add" button () at the top of the portlet and click either "Multiple Documents", "Basic Document", or one of the "Document Types (previously configured)":



Depending on what you selected it will either open the “New Document” page (for uploading a single basic document), the “Add Multiple Documents” page (for uploading documents in bulk), or one of the documents types you have previously configured:

New Document Page:

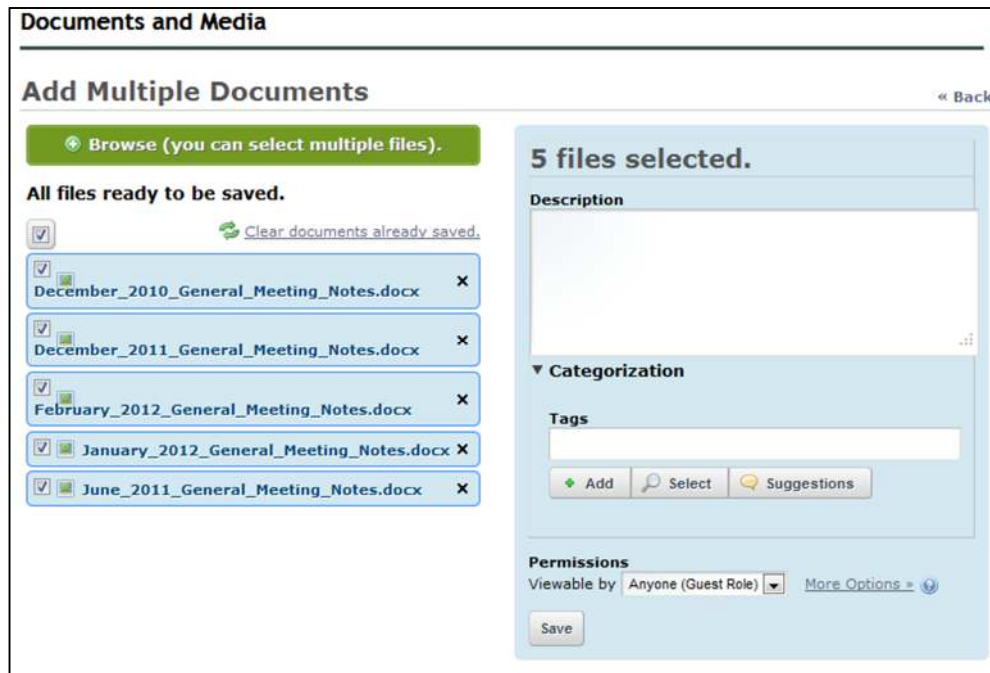


Add Multiple Documents:






The “Browse” link will open up a file browser on your local machine and you can then select multiple files and click “OK”. The “Basic Document” upload only allows you to upload one file at a time. With the “Basic Document” upload you can specify the file’s name, title, description, “Document Type”, tags, related assets, and permissions. When you upload multiple files the actual file name becomes the File name and you can specify the description, tags, and permissions.

After selecting your files using the “Browse” link you will then those selected files will populate the “Add Multiple Documents” page:



They will begin to immediately upload to the folder. Once they are uploaded you can then “Save” the files with the description, tags, and permissions. Once “Saved” they will be available in the folder.


You can then either:

- Add additional files by clicking the “Browse” link again

- Clear documents already saved

- Cancel the upload by not “Saving” and clicking “Back”


Once the files are uploaded they are available in the folders and depending on your configuration available for use on your website when editing web content pages.

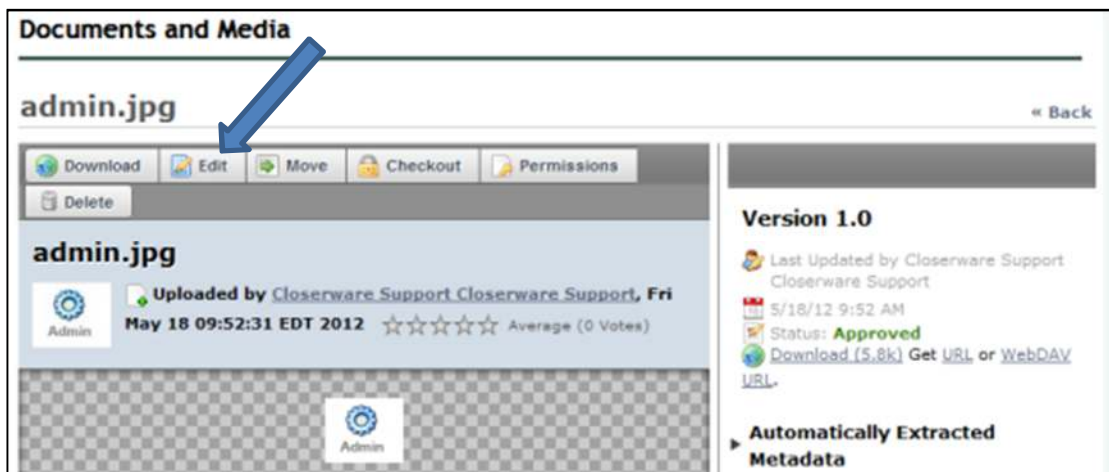
Editing Files

To edit an existing file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can edit files in one of the following two ways:

- 1 - On the file list, click the “Action” icon () next to the file you wish to edit and then select “Edit” when the actions list expands:



2 – Navigate to the folder where the file resides and click on the file link of the file you wish to edit. This will open up the file page and you click on the “Edit” button:

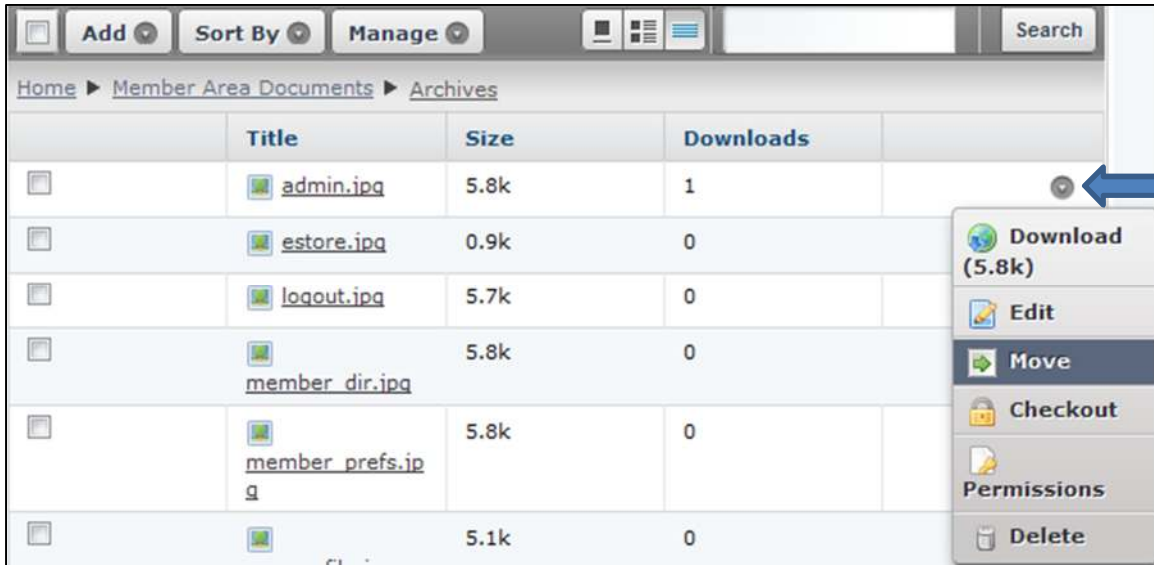


Once you are ‘editing’ the file you can modify the file itself by uploading a new version of the file, its Name, Description, Tags, “Document Type”, Related Assets and then click “Publish”. You can also “Check out” the file which locks the file for editing by another member.

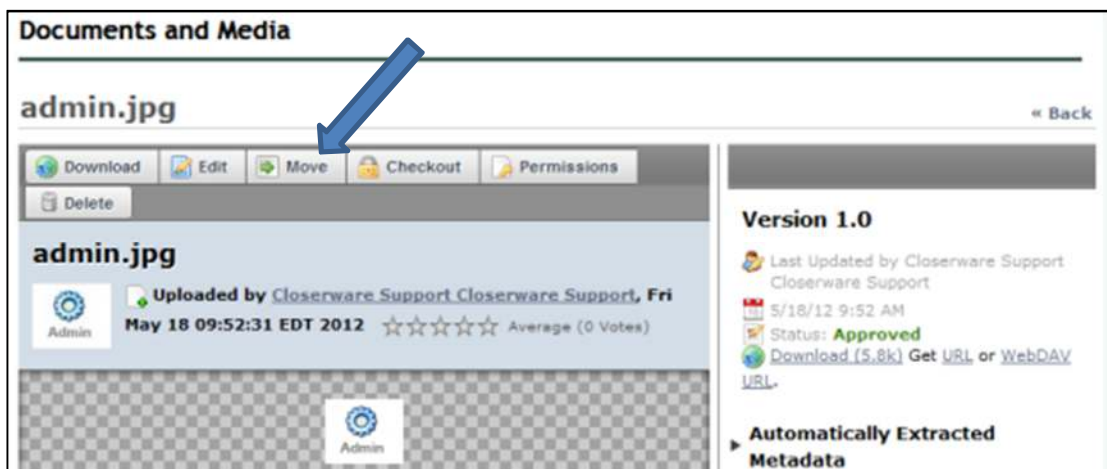
Moving Files

To move an existing file from one folder to another, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can move files in one of two ways:

1 - On the file list, click the “Action” icon () next to the file you wish to edit and then select “Move” when the actions list expands:



2 – Navigate to the folder where the file resides and click on the file link of the file you wish to move. This will open up the file page and you click on the “Move” button:

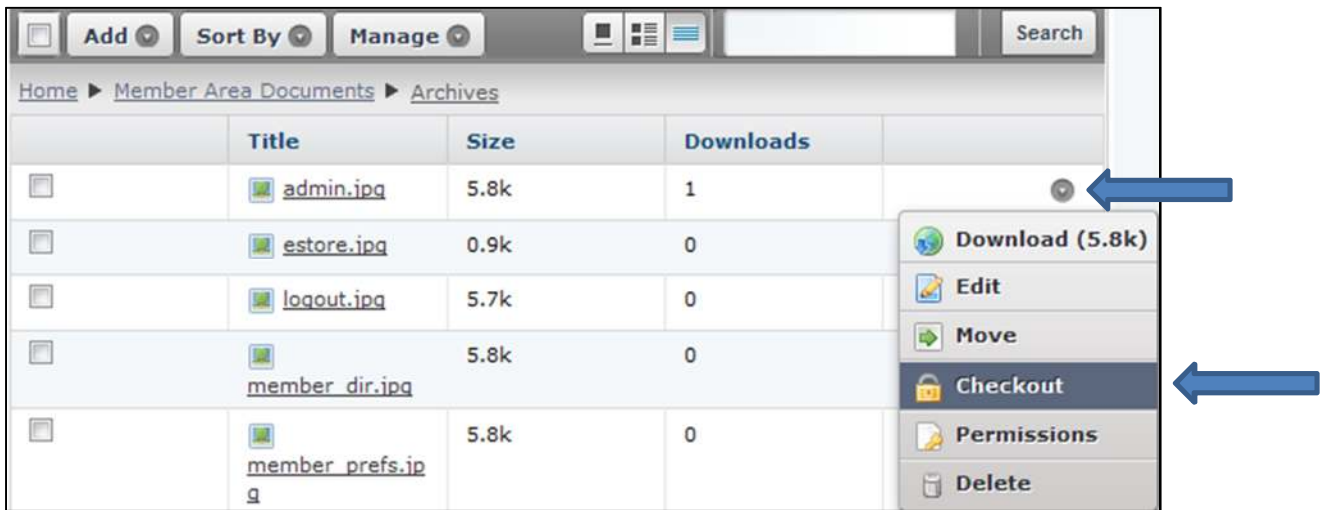


After you have clicked “Move” you can then hit the “Select” button next to “New Folder” to open a new window which will allow you to navigate through your site folder structure and choose the file’s new folder location. Once you click “Choose” on the folder you wish the file to reside you will then be taken back to the initial page and the new folder location will be listed and you just need to click the “Move” button.

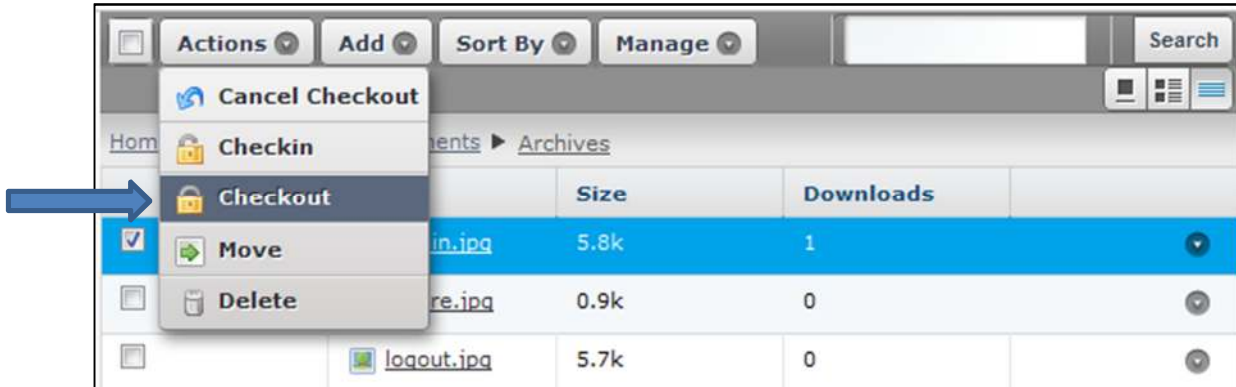
Checking Out and Checking In Files

To lock an existing file from being updated by another administrator while you work on it, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can check out a file in one of three ways:

1 – After navigating to the folder where the file exists, click the “Action” icon (⌵) next to the file you wish to edit and then select “Move” when the actions list expands:



2 – When the file you wish to check out is visible in the window you can then check the box to the left of its name and this will produce the “Actions” button, then you will click on the “Actions” button (Actions ⌵) at the top of the portlet and click “Checkout”:



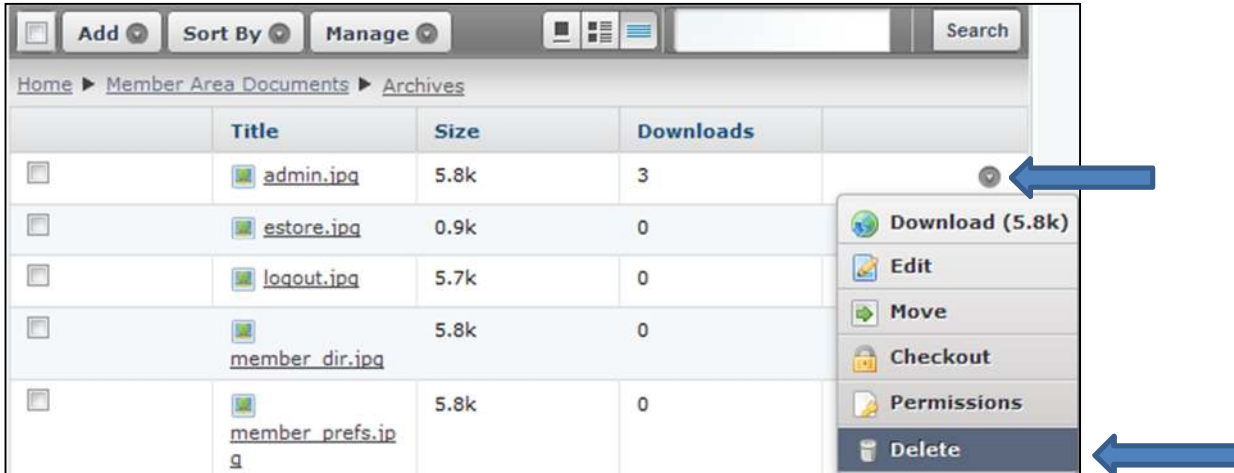
3 – When editing a file there is a “Checkout” button. After you have “Checked Out” a file, no one else can edit this file until you “Check In” the file. This lock will automatically expire in 1 day.

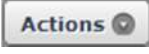
To “Check In” a document you will follow the same instructions as for “Checking Out” a file but the buttons will now be “Check In”. You can also “Cancel a Check Out” while on a file page.

Deleting Files

To delete an existing file or past versions of a file, you will log into your VolunteerMatters Component site with the appropriate access and then navigate to the page the portlet is on and then you can delete file or past versions in one of three ways:

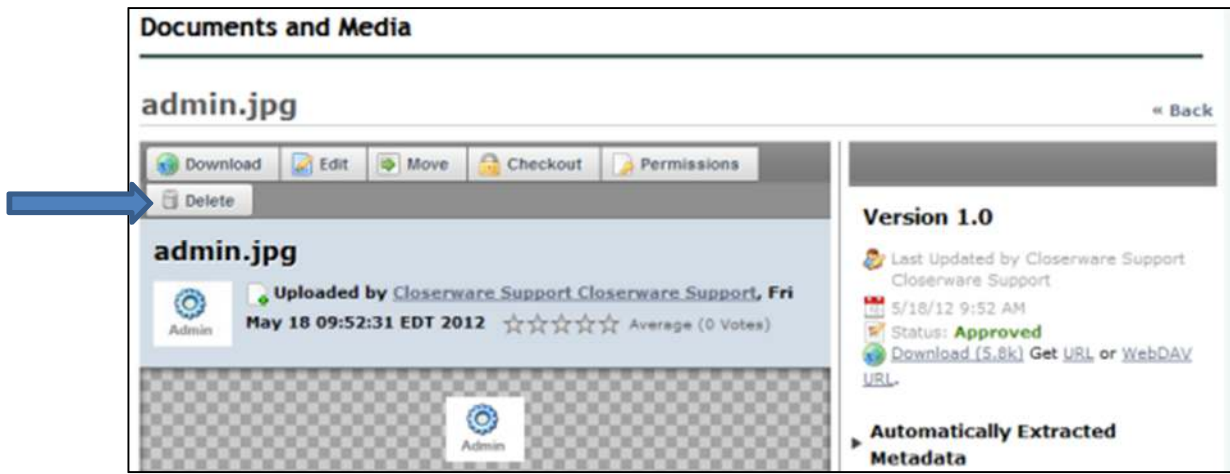
1 – After navigating to the folder where the file exists, click the “Action” icon (⌵) next to the file you wish to delete and then select “Delete” when the actions list expands:



2 – When the file you wish to delete is visible in the window you can then check the box to the left of its name and this will produce the “Actions” button, then you will click on the “Actions” button () at the top of the portlet and click “Delete”:



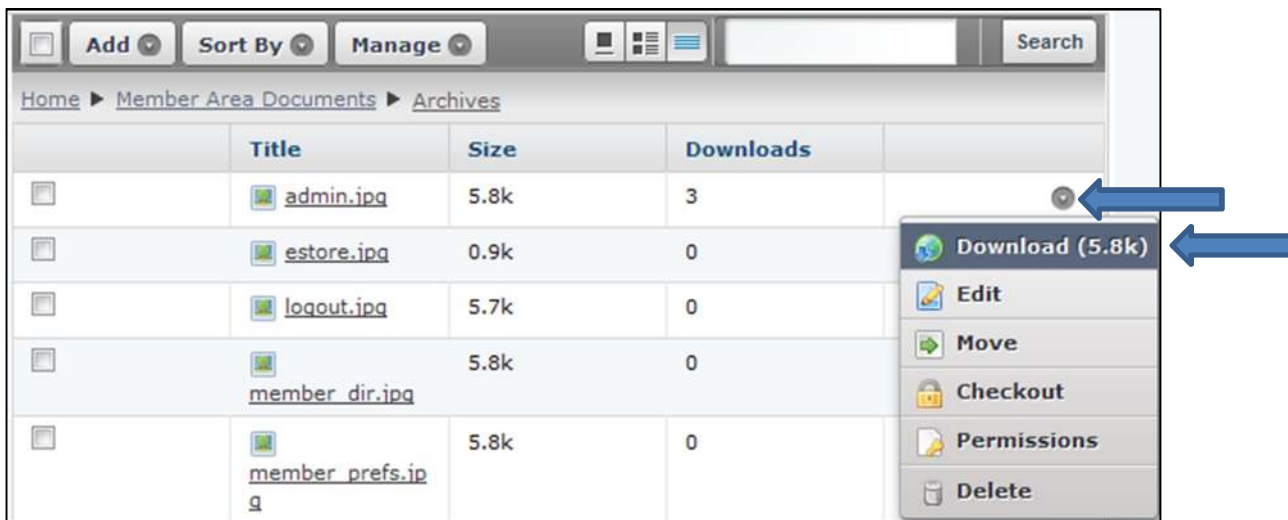
3 – Navigate to the folder where the file resides and click on the file link of the file you wish to delete. This will open up the file page and you click on the “Delete” button:



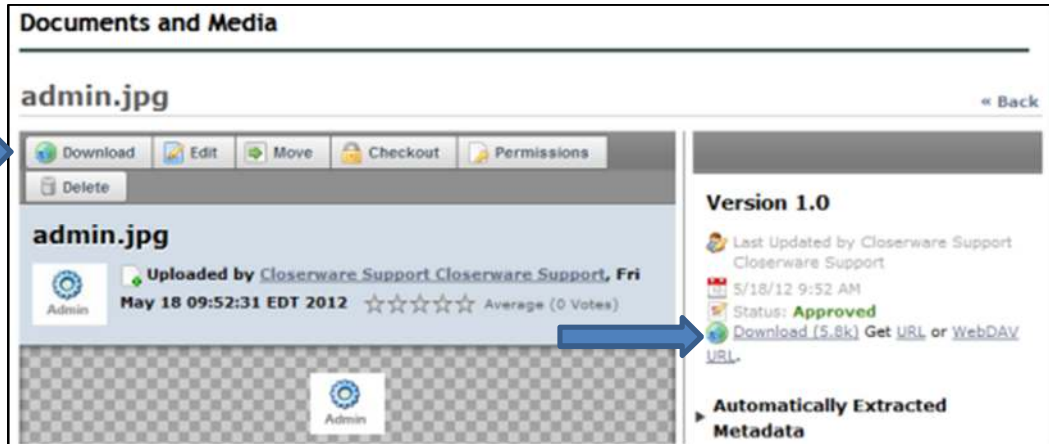
Downloading Files

To download an existing file or past versions of a file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can download the file or past versions in one of two ways:

1 – After navigating to the folder where the file exists, click the “Action” icon (⌵) next to the file you wish to download and then select “Download” when the actions list expands:



2 – Navigate to the folder where the file resides and click on the file link of the file you wish to download. This will open up the file page and you click on either of the two “Download” buttons:

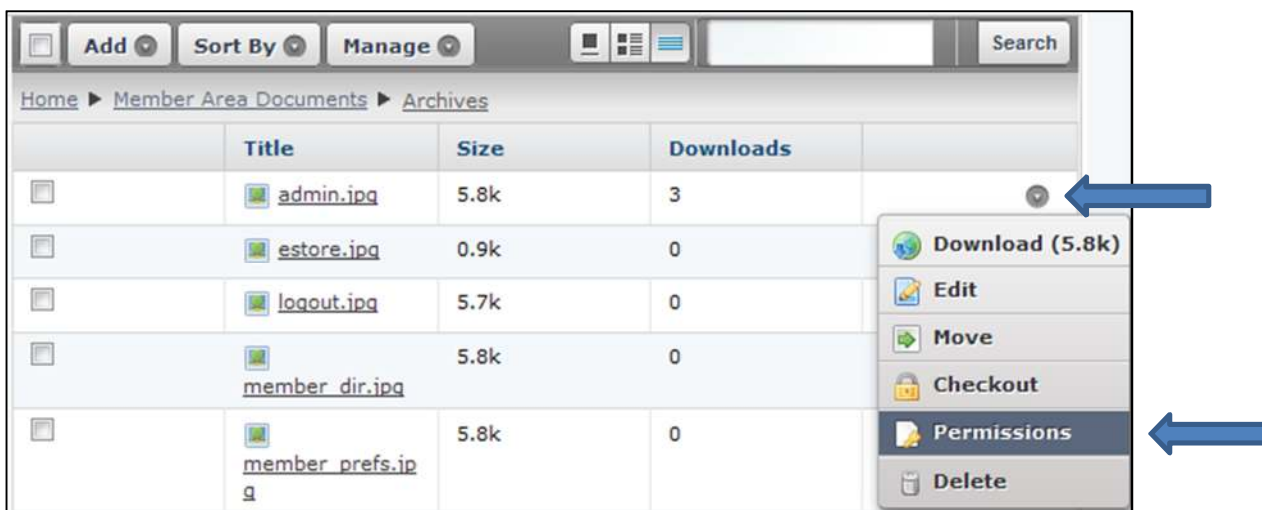


After you have clicked the “Download” button your browser settings will take over and either open the file or present you the choice of opening or saving the file.

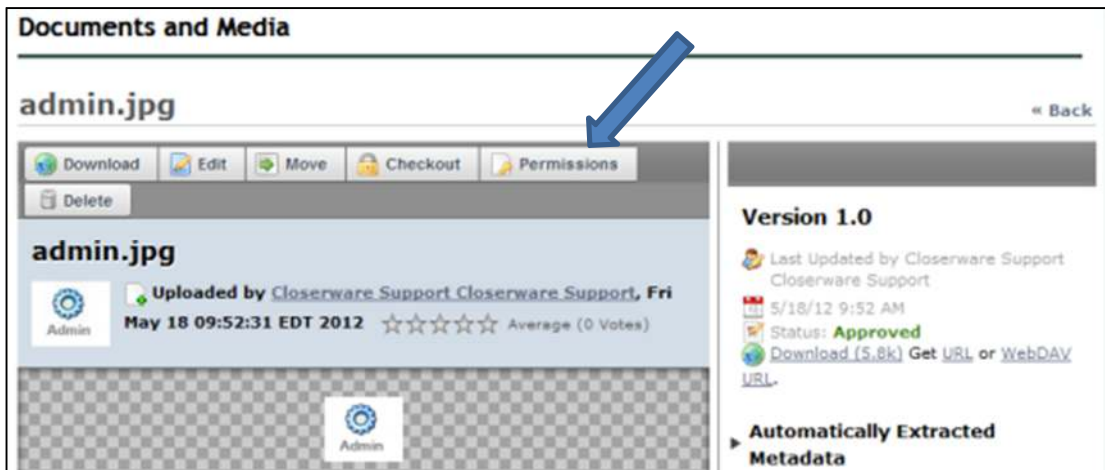
Change Permissions on a File

To change permissions on an existing file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can change the permissions on a file in one of two ways:

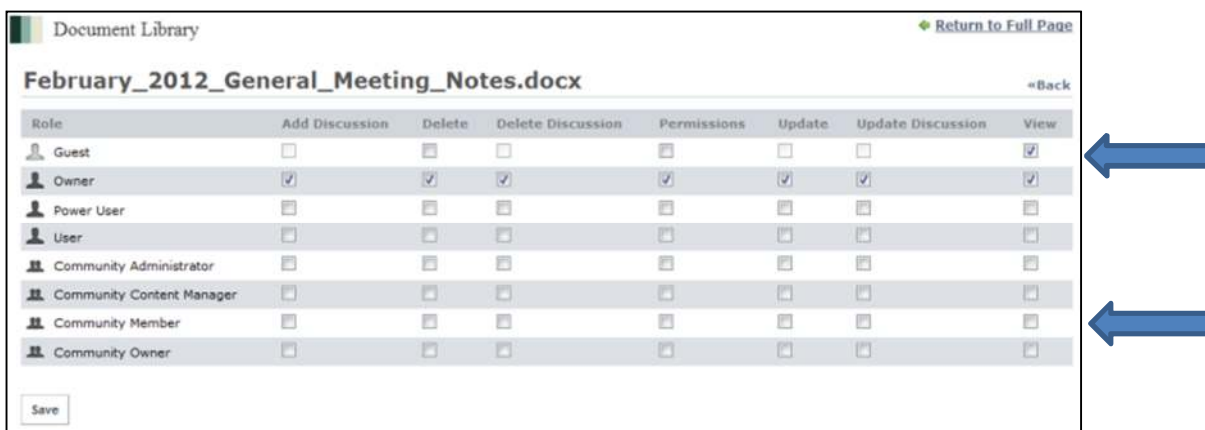
1 – After navigating to the folder where the file exists, click the “Action” icon (⌵) next to the file you wish to change permissions on and then select “Permissions” when the actions list expands:



2 – Navigate to the folder where the file resides and click on the file link of the file you wish to change permissions on. This will open up the file page and you click on “Permissions” button:



After you have clicked the “Permissions” button you will be presented with a grid of permission choices/options of the file that you can update:



To make a public file, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only file, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the file, etc. For the most part you will only mark whether or not who can VIEW the file. The rest of the settings will depend on the user’s built-in permissions.

Documents and Media Display Portlet

The Documents and Media Display Portlet shows a specific folder of the document library. It looks and works like the document library portlet, but it does not contain any actions or other modification

features. The main idea of this portlet is to function as a read-only view for a selected document library. This must be added by Closerware Support.

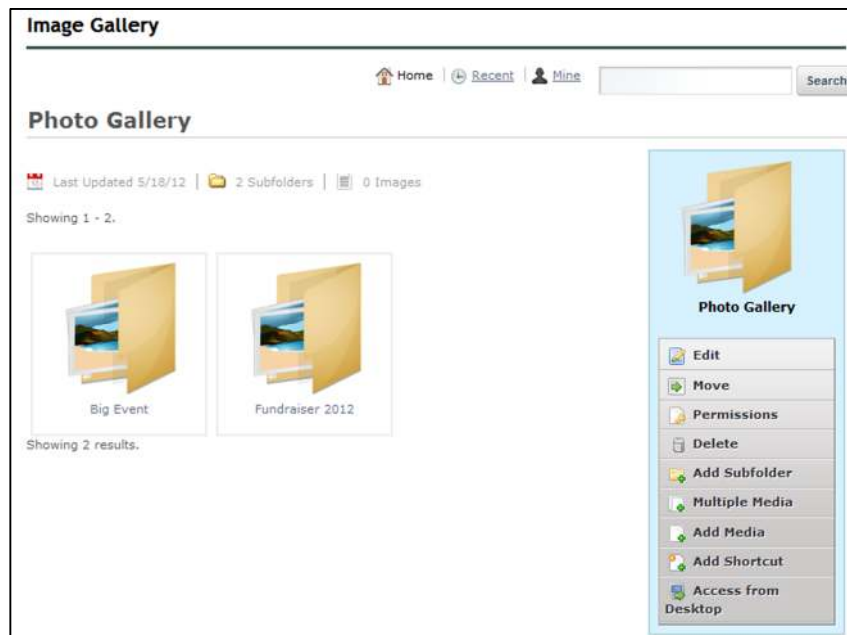
Media Gallery

VolunteerMatters components Website features ‘Media Gallery’ portlets that provide a location to create and manage media galleries via a typical folder structure similar to the Documents and Media portlet. They are equipped with customizable folders and the media files can also be accessed and uploaded using WebDAV (See the Access from Desktop information in the Documents and Media section of this guide). Because content is accessible only by those authorized by the administrator, each individual folder/image is as open or as secure as you need it to be.

You can add as many subfolders as you want under any folder that you have permission for. You can setup the permissions for each folder and image individually as needed. Each folder and image has an individual WebDAV URL, which you can use to access the image. If that image is protected with permissions, then the user is prompted for their credentials.

You can choose the scope of the Image Gallery. It can be for the entire site or the current page. If it is for the entire site, then the image gallery is site wide, but if you choose current page, then that image gallery is related to that current page only. Scope settings must be configured by Closerware Support.

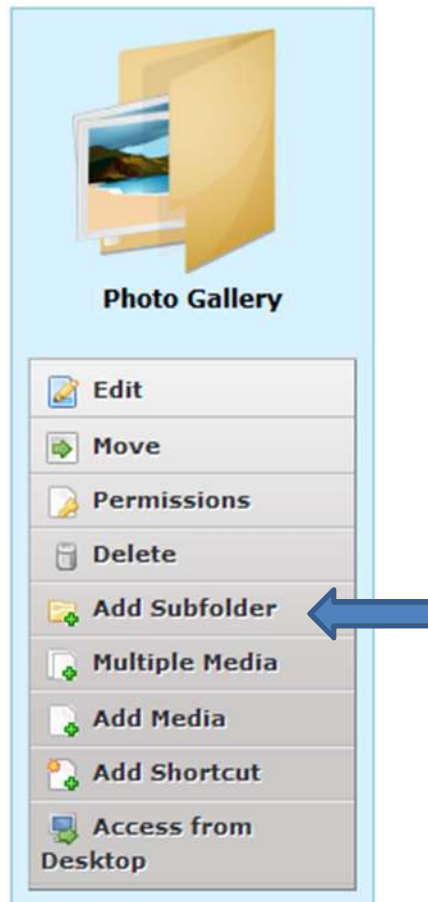
You can also have Closerware Support configure the “Root” folder for the Media Gallery as any folder in your documents and media structure.



Creating Folders

To create a new folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the media gallery portlet is on and then you can create folders the following way:

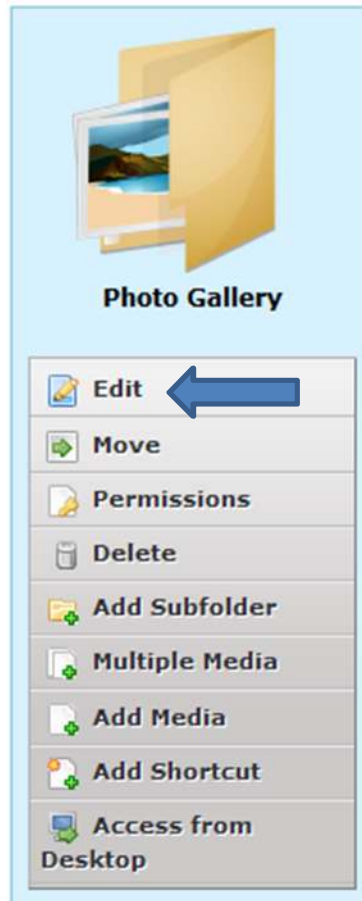
Navigate to the folder you wish to add the folder to and then when in that folder click on the “Add Subfolder” button:



Editing Folders

To edit an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the media gallery portlet is on and then you can edit folders the following way:

Navigate to the folder you wish to edit and then when in that folder click on the “Edit” button:

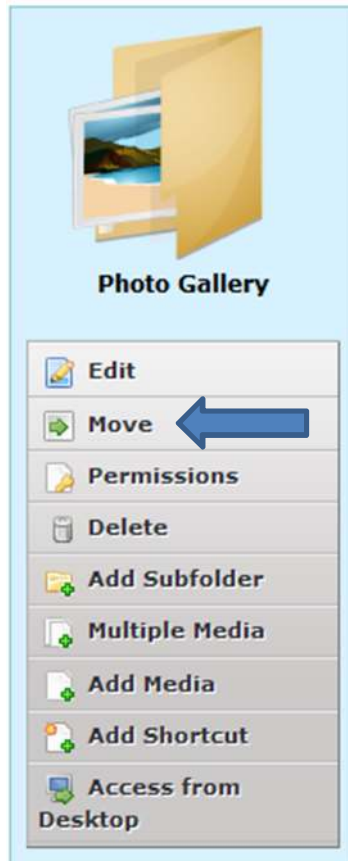


Once you are 'editing' the folder you can view its Parent Folder and edit its Name, Description, and "Document Type Restrictions" and then click "Save" when you have made your desired changes.

Moving Folders

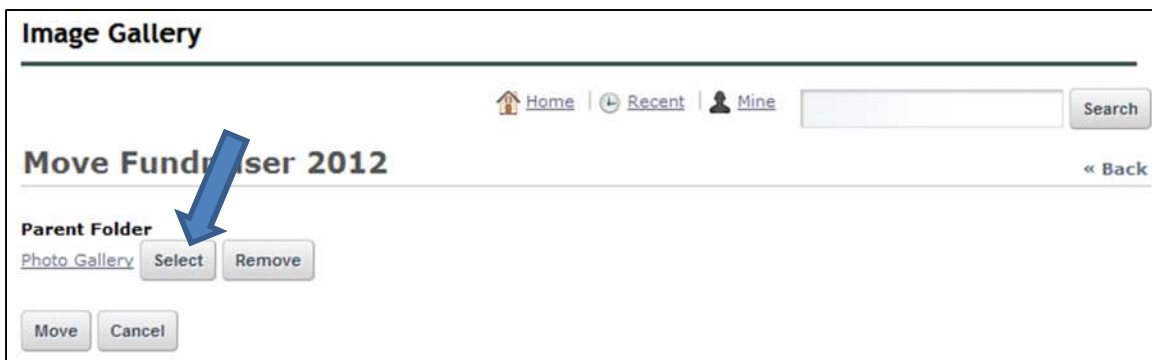
To move an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the media gallery portlet is on and then you can move folders the following way:

Navigate to the folder you wish to move and then when in that folder click on the "Move" button:



Once you click “Move” you can view its current Parent Folder.

To move a folder you click the “Select” button under “Parent Folder”:



This will open a new window which will allow you to navigate through your media gallery folder structure and choose the folder’s new location (new parent folder).

Once you click “Choose” on the folder you wish the folder to reside you will then be taken back to the initial page and the new parent folder location will be listed and you just need to click the “Move” button.

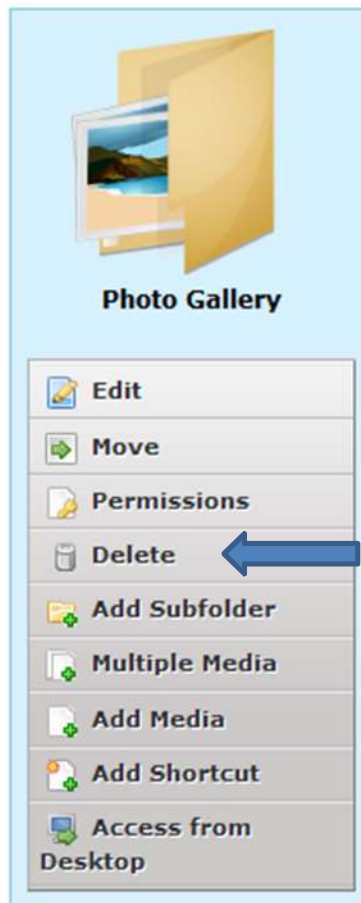
Deleting Folders*

***NOTE: IF YOU DELETE A FOLDER YOU WILL DELETE ALL OF ITS SUBFOLDERS & IMAGES**

Please move any subfolders or images prior to deleting a folder if you wish to keep them!

To delete an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the media gallery portlet is on and then you can delete folders the following way:

Navigate to the folder you wish to delete and then when in that folder click on the “Delete” button:



Change Permissions on a Folder

To change permissions on an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can change the permissions on the folders the following way:

Navigate to the folder you wish to change the permissions on and then when in that folder click on the “Permissions” button:



After you have clicked the “Permissions” button you will be presented with a grid of permission choices/options of the folder that you can update:

Photo Gallery ← Back								
Role	Access	Add Document	Add Shortcut	Add Subfolder	Delete	Permissions	Update	View
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Board	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To make a public folder, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only folder, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the folder, etc. For the most part you will only mark whether or not who can VIEW the folder. The rest of the settings will depend on the user’s built-in permissions.

Access folders via Desktop

Files and folders can be managed directly from the file explorer of your desktop operating system. Before accessing from Windows, please ensure you have installed the [patch](#) from Microsoft.

The folders are accessible via WebDAV. WebDAV provides functionality to create, change and move documents on a remote server (typically a web server or "web share"). WebDAV is supported by all major Operating Systems and Desktop Environments including Windows, Mac OS X and Linux (KDE and GNOME).

To utilize this functionality you will need to first obtain the WebDAV URL for the folder you wish to access.

Log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can obtain the WebDAV URL the following way:

Navigate to the folder you wish to access via the desktop and then when in that folder click on the "Access from Desktop" button:



This will open the following window with the WebDAV URL for that folder that you will then copy:



For more information on accessing the folders from your local machine after obtaining the WebDAV URL see the Documents and Media WebDAV section above.

Media Files

Each media file will have their original name, but it is possible to change it in VolunteerMatters Components. You can also update the image. Each image can have both title and description, and also additional tags.

Users can also rate images. You can see both your own personal rating and average rating for the media file. Each media file can have WebDAV URL and HTTP URL in the same way as folders.

Adding Media Files

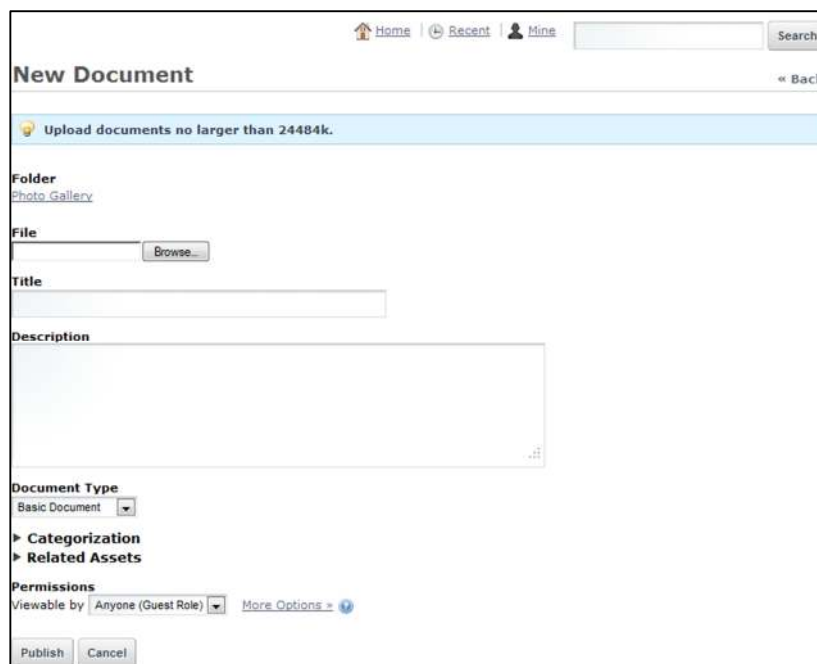
To add a new media file to an existing folder you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can add files to folders the following ways:

- 1 – Navigate to the folder you wish to access via the desktop and then when in that folder click on the “Add Media” button to add one file at a time.
- 2 - Navigate to the folder you wish to access via the desktop and then when in that folder click on the “Multiple Media” button to add multiple files at the same time.



Depending on what you selected it will either open the “New Document” page (for uploading a single media file) or the “Add Multiple Media” page (for uploading media files in bulk), or one of the documents types you have previously configured:

New Document Page:



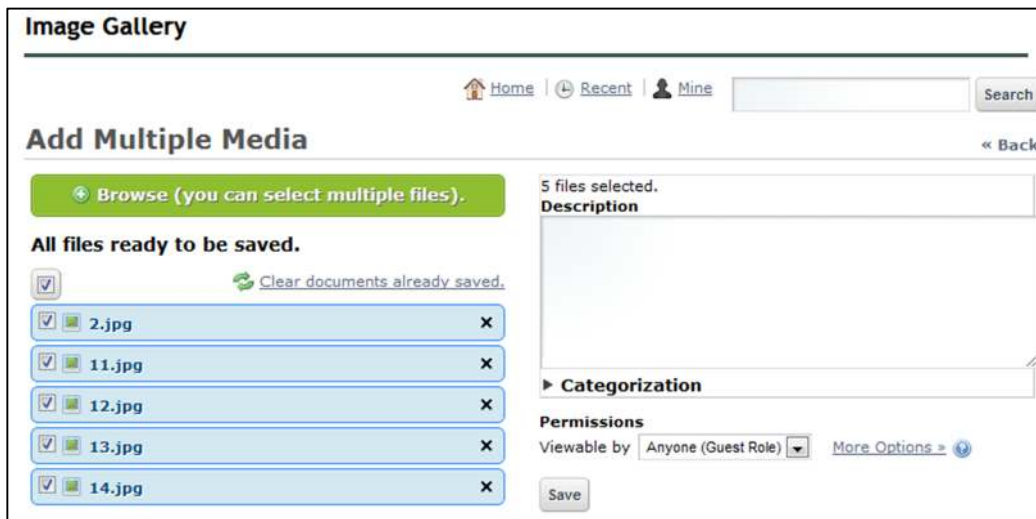
The screenshot shows the 'New Document' page. At the top, there are navigation links for Home, Recent, and Mine, along with a search box. Below this is a warning message: 'Upload documents no larger than 24484k.' The main content area is titled 'New Document' and includes a 'Folder' dropdown set to 'Photo Gallery'. There is a 'File' input field with a 'Browse...' button, a 'Title' input field, and a 'Description' text area. Below these is a 'Document Type' dropdown set to 'Basic Document'. There are also sections for 'Categorization', 'Related Assets', and 'Permissions', with the 'Permissions' section showing 'Viewable by' set to 'Anyone (Guest Role)'. At the bottom, there are 'Publish' and 'Cancel' buttons.

Add Multiple Media:






The “Browse” link will open up a file browser on your local machine and you can then select multiple files and click “OK”. The “Add Media” upload only allows you to upload one file at a time. With the “Add Media” you can specify the file’s name, title, description, “Document Type”, tags, related assets, and permissions. When you upload multiple files the actual file name becomes the File name and you can specify the description, tags, and permissions.

After selecting your files using the “Browse” link you will then those selected files will populate the “Add Multiple Media” page:



They will begin to immediately upload to the folder. Once they are uploaded you can then “Save” the files with the description, tags, and permissions. Once “Saved” they will be available in the folder.

You can then either:

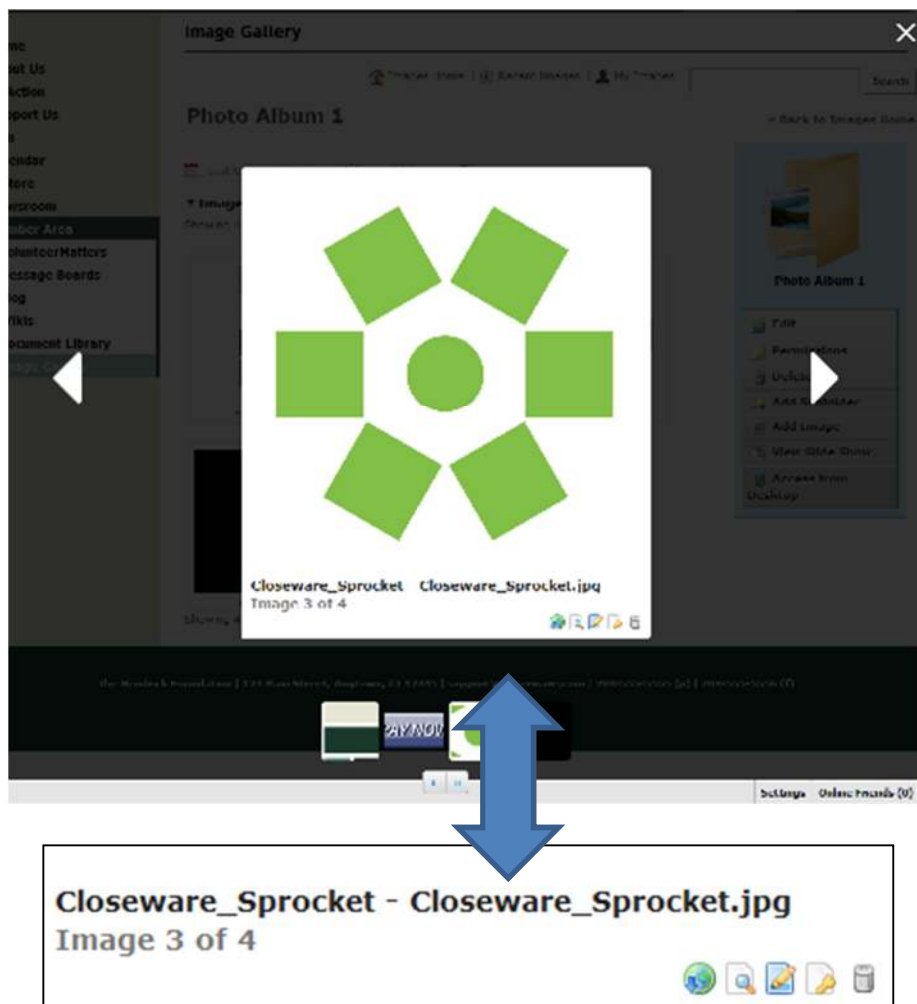
- Add additional files by clicking the “Browse” link again

- Clear documents already saved

- Cancel the upload by not “Saving” and clicking “Back”


Once the files are uploaded they are available in the folders and depending on your configuration available for use on your website when editing web content pages.

Editing Media Files

To edit an existing media file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can edit the media files in a couple different ways.

When you have navigated to the folder where the image exists, click on the image. This will open the media file the following manner:




From there you can click directly on the ‘Edit’ icon () or click on the ‘View’ icon ().

The ‘Edit’ icon will take you directly to the page to edit the media file details: you can modify the media itself by uploading a new version of the media file, its Name, Description, “Document Type”, Tags, and Related Assets then click “Save”.

The 'View' icon will take you to the media's detail page where you can then click on the 'Edit' button to take you to the editing page to complete your changes:



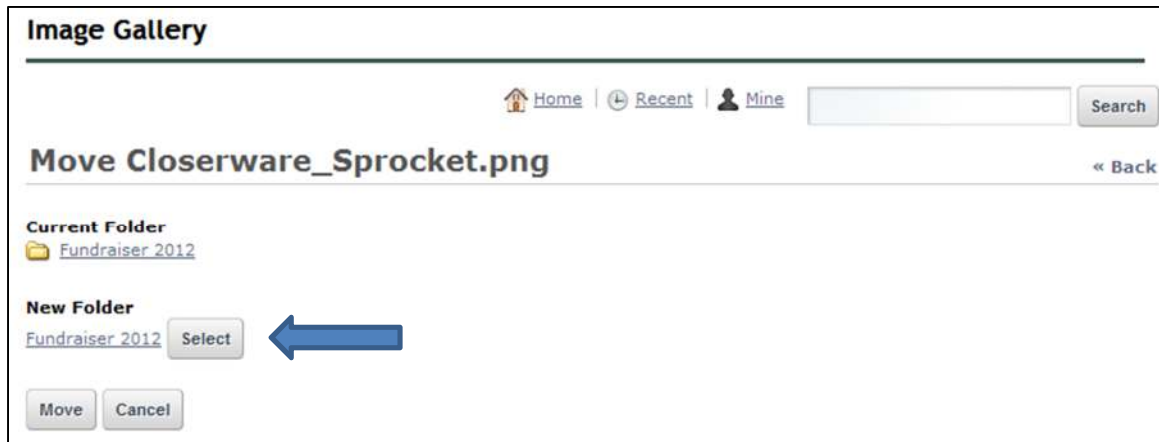
Moving Media Files

To move an existing media file from one folder to another, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you click the "View" button () on the media file as just discussed. When you are on the media's detail page you can then hit the "Move" button:



Once you click "Move" you can view its current Folder.

To move a media file you click the "Select" button next to "New Folder":

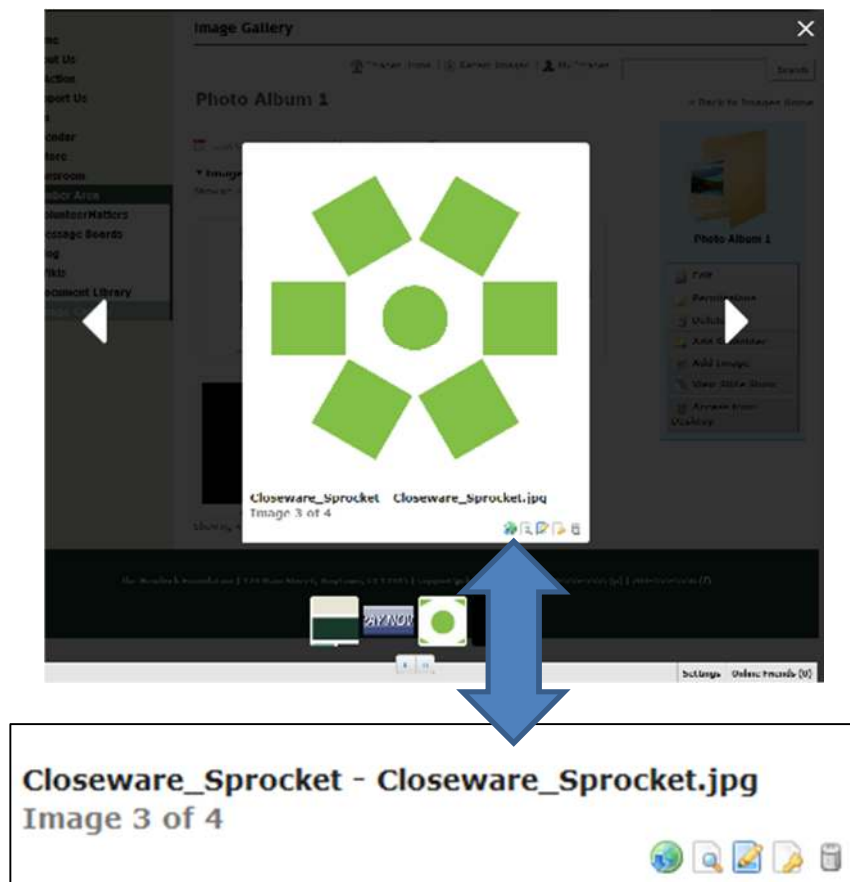


This will open a new window which will allow you to navigate through your media gallery folder structure and choose the media file's new folder location. Once you click "Choose" on the folder you wish the media to reside you will then be taken back to the initial page and the new folder location will be listed and you just need to click the "Move" button.

Deleting Media Files

To delete an existing media file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can delete the media file in a couple different ways.

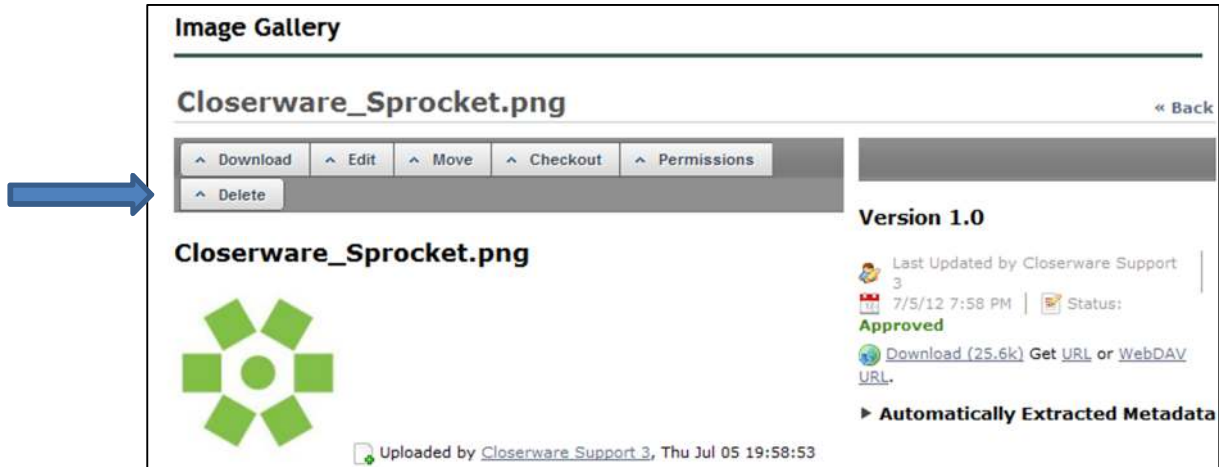
When you have navigated to the folder where the media exists, click on the media file. This will open the image the following manner:



From there you can click directly on the 'Delete' icon () or click on the 'View' icon ()

The 'Delete' icon will delete the image right there in that window. A pop-up will ask if you are sure and you will say 'OK' and it will return you to the image folder you were in.

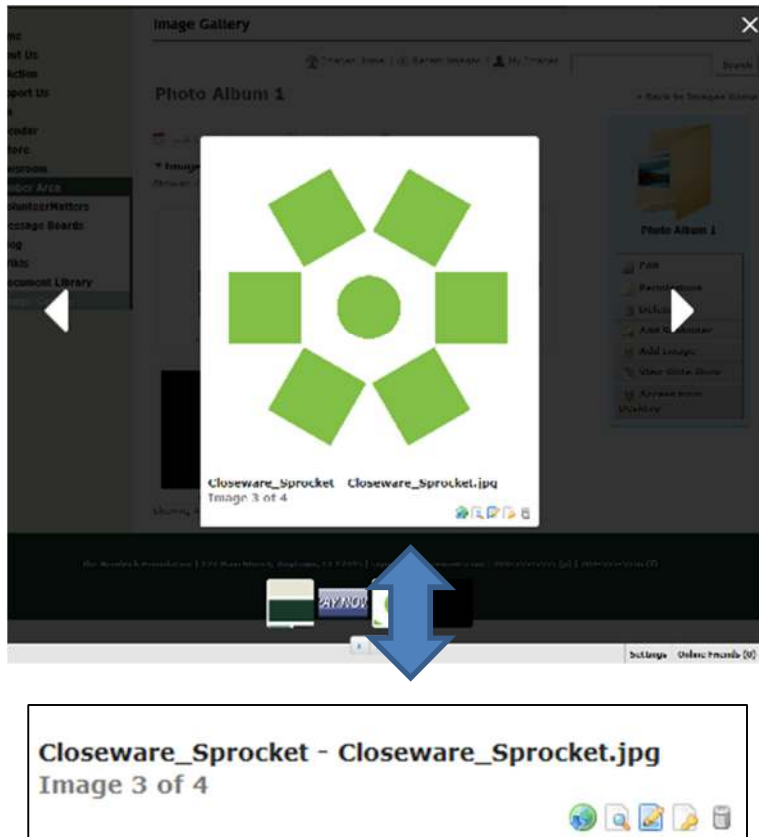
The 'View' icon will take you to the picture's detail page where you can then click on the 'Delete' button to remove the image:



Downloading Media Files

To download an existing media file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can download the media file in a couple ways.

When you have navigated to the folder where the media file exists, click on the media file. This will open the media the following manner:



From there you can click directly on the ‘Download’ icon () or on the ‘View’ icon ()

The ‘Download’ icon will download the media file right there in that window. After you have clicked the “Download” button your browser settings will take over and either open the file or present you the choice of opening or saving the file.

The ‘View’ icon will take you to the media’s detail page where you can then click on the ‘Download’ button to download the media file:

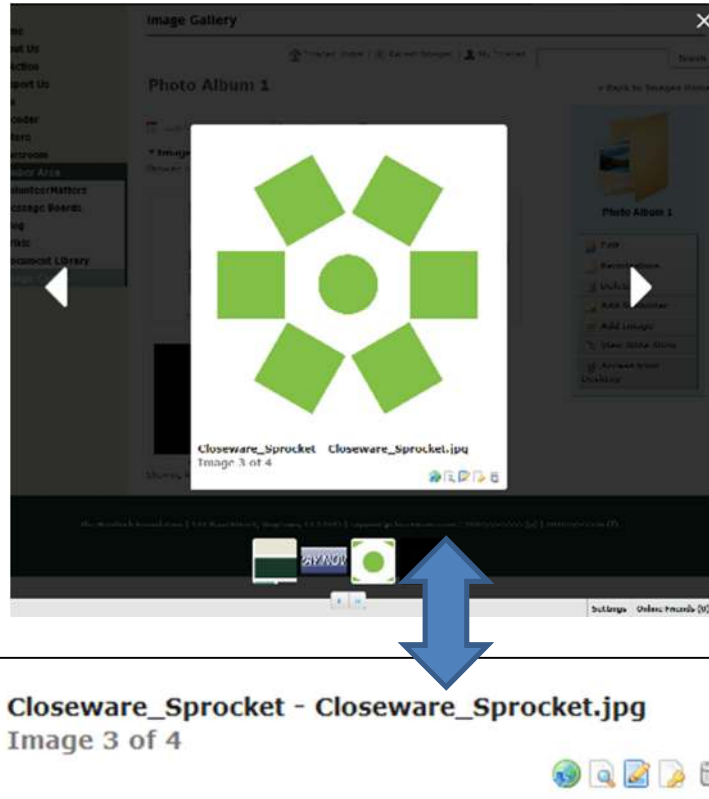


After you have clicked the “Download” button your browser settings will take over and either open the file or present you the choice of opening or saving the file.

Change Permissions on a Media File

To change permissions on an existing media file, you will log into your VolunteerMatters Components site with the appropriate access and then navigate to the page the portlet is on and then you can change the permissions on a media file in a couple ways.

When you have navigated to the folder where the media exists, click on the media file. This will open the media file the following manner:



Closeware_Sprocket - Closeware_Sprocket.jpg
Image 3 of 4

From there you can click directly on the 'Permissions' icon () or the 'View' icon ().

The 'Permissions' icon will take you directly to the images permissions window.

The 'View' icon will take you to the media's detail page where you can then click on the 'Permissions' button to change the media's permissions:



After you have clicked the "Permissions" icon or button you will be presented with a grid of permission choices/options of the media file that you can update:

Image Gallery (Image Gallery) [Return to Full Page](#)

Closeware_Sprocket [Back](#)

Role	Delete	Permissions	Update	View
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Content Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

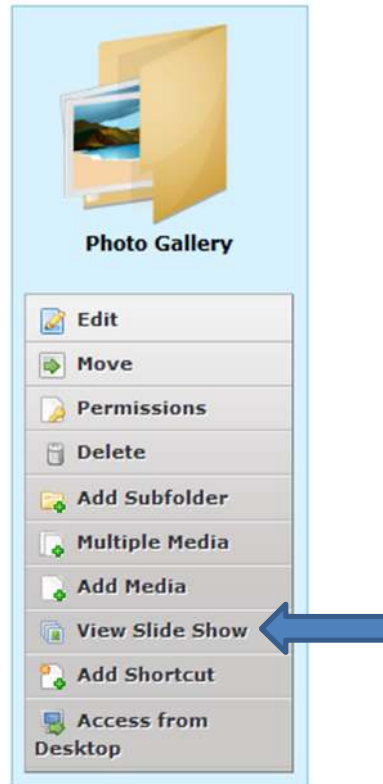
To make a public media file, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only media file, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the media file, etc. For the most part you will only mark whether or not who can VIEW the media. The rest of the settings will depend on the user's built-in permissions.

VIEWING THE MEDIA AS A SLIDE SHOW

To view the media of a gallery/folder in a slide show you will log into your VolunteerMatters Components site and then navigate to the page the portlet is on and view the slide show in the following way:

Navigate to the folder you view to media in a slide show and then when in that folder click on the "View Slide Show" button:



This will open a new browser window with the media automatically scrolling through (along with slideshow control buttons):

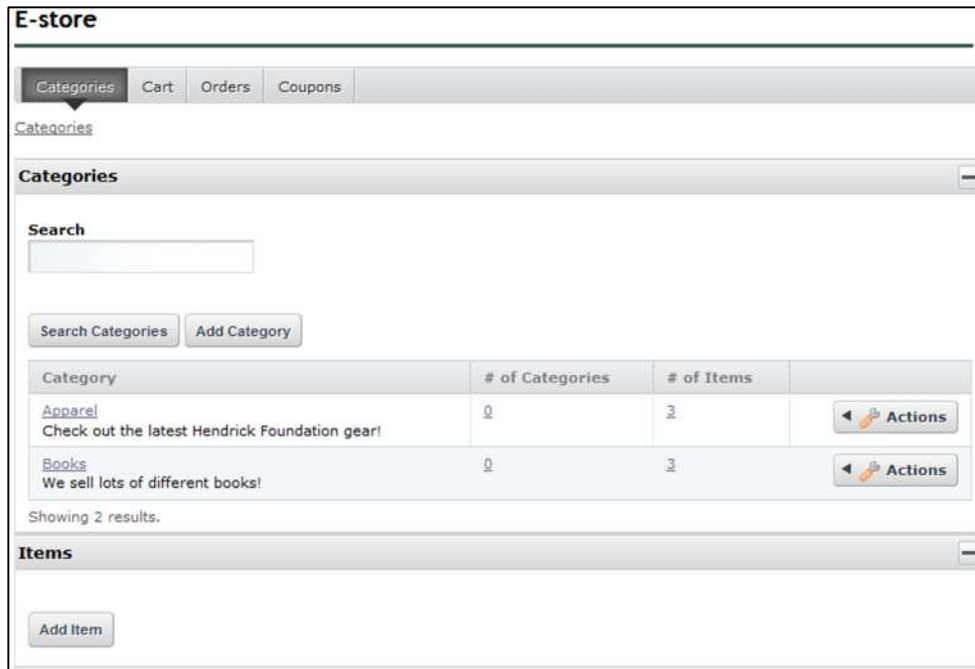


eStore

Overview

VolunteerMatters Components features an optional shopping portlet that allows you to add multiple categories and sub-categories as well as items (products) to any of these different categories or root shopping cart level. The shopping portlet cart can be integrated with a PayPal Website Payments Standard account for automatic online payment transactions. You will just need to provide your PayPal account email address to Closerware Support and activate Instant Payment Notification within your PayPal account and enter the following URL:

<http://www.yourdomainname.com/c/shopping/notify>.



The shopping portlet also has baseline information for Taxation, Shipping, and Insurance calculations. These are configured by Closerware Support. You can email support@closerware.com with your requested values. These values will be used when not specified on the item level.

The options available for these baseline shopping portlet settings are as follows:

Taxation:

Please provide your Tax State and Tax Rate for your shopping portlet.

Tax State

Tax Rate

Shipping:

With shipping you have two choices for the formula. You can specify it to use a Flat amount or percentage of the amount purchased. The amount purchased increments are:

- \$0.01 - \$9.99
- \$10.00 - \$49.99
- \$50.00 - \$99.99
- \$100.00 - \$199.99
- \$200.00 and over.



The screenshot shows the 'Shipping Calculation' tab in the 'Payment Settings' section. It features a blue banner with a lightbulb icon and the text: 'Calculate a flat shipping amount based on the total amount of the purchase. -- or -- Calculate the shipping based on a percentage of the total amount of the purchase.' Below this, there is a 'Formula' section with a dropdown menu set to 'Percentage'. Underneath, there are five 'Values' sections, each corresponding to a price range: '\$0.01 - \$9.99', '\$10.00 - \$49.99', '\$50.00 - \$99.99', '\$100.00 - \$199.99', and '\$200.00 and over'. Each range has an empty input field for specifying a value. A 'Save' button is located at the bottom left of the form.

For example you can set it to be 5% of all amounts or for just one value increment and another percentage for another increment and so on.

Insurance:

With insurance you have two choices for the formula. You can specify it to use a Flat amount or percentage of the amount purchased. The amount purchased increments are the same:

- \$0.01 - \$9.99
- \$10.00 - \$49.99
- \$50.00 - \$99.99
- \$100.00 - \$199.99
- \$200.00 and over.

Payment Settings Shipping Calculation **Insurance Calculation** Emails

Calculate a flat insurance amount based on the total amount of the purchase. - OR - Calculate the insurance based on a percentage of the total amount of the purchase.

Formula
Flat Amount

Values
\$0.01 - \$9.99

\$10.00 - \$49.99

\$50.00 - \$99.99

\$100.00 - \$199.99

\$200.00 and over

Save

For example you can set it to be 5% of all amounts or for just one value increment and another percentage for another increment and so on. If you do not wish to use insurance you can simply leave it empty.

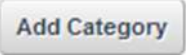

Email Settings:

You can also have Closerware Support configure your email settings:

1. Email From (Name and Email)
2. Confirmation Email Verbiage
3. Shipping Email Verbiage
4. Administrator Notification Email (Name and Email)

Product Categories

Adding:

You can create as many categories and subcategories as you wish within the Shopping Portlet. To create a category log into your VolunteerMatters Components site with the appropriate administrative access and navigate to your shopping page. There click on the “Add Category” button (). If you wish to add a subcategory, you will need to click on a category to take you into that particular category and then click the “Add Subcategory” button ().

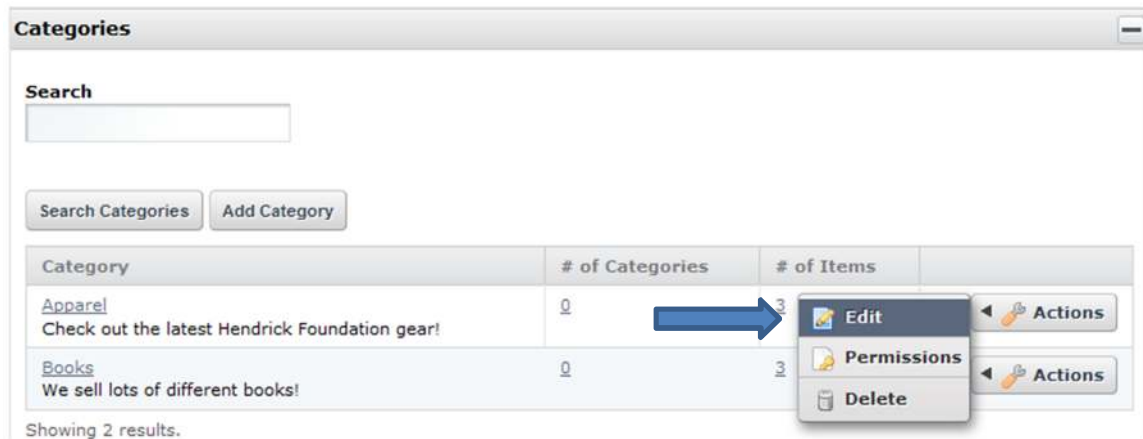
This will take you to the Category page where you can designate the following:

1. Category Name
2. Description (plain text and appears when there is a list of the categories)
3. Detailed Description (available with HTML and appears when you are in the category)
4. Permissions which will designate who has access to view that category.

Editing:

To edit an existing category's name, description, detailed description, parent category, and permissions you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you will locate the category you wish to edit and click the

“Actions” button () and select “Edit”:



This will open the Category page where you can edit the Category Name, Description, Detailed Description, and Parent Category.

To change the category you will click the “Select” button under “Parent Category”:




This will open a new window which will allow you to navigate through your shopping portlet category structure and choose the category's location (parent category).

Categories

Category	# of Categories	# of Items	
Apparel Check out the latest Hendrick Foundation gear!	0	13	Choose
Books We sell lots of different books!	0	13	Choose






Showing 2 results.

To modify a category's permissions you will locate the category you wish to modify and click the "Actions" button () and select "Permissions":

Categories

Search

Search Categories Add Category

Category	# of Categories	# of Items	
Apparel Check out the latest Hendrick Foundation gear!	0	13	 Edit  Permissions  Delete
Books We sell lots of different books!	0		 Actions  Actions

Showing 2 results.

After you have clicked the "Permissions" button you will be presented with a grid of permission choices/options of the category that you can update:

Shopping

[Return to Full Page](#)

Apparel

[Back](#)

Role	Add Item	Add Subcategory	Delete	Permissions	Update	View
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Content Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save


To make a public category, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only category, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the category, etc. For the most part you will only mark whether or not who can VIEW the folder. The rest of the settings will depend on the user's built-in permissions.

Deleting:

***NOTE: IF YOU DELETE A CATEGORY YOU WILL DELETE ALL OF ITS SUBFOLDERS AND ITEMS!!!!**

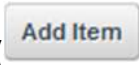
Please move any subcategories or items prior to deleting a category if you wish to keep them!

To delete an existing category you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you will locate the category you wish to delete and click the "Actions" button () and select the "Delete":



Products/Items

Adding:

You can create as many items as you wish within the Shopping Portlet. To create an item, log into your VolunteerMatters Components site with the appropriate administrative access and navigate to your shopping page. Then navigate to the category you wish the item to appear in and then click on the "Add Item" button ().

This will take you to the Item page where you will designate the following attributes:

1. SKU
2. Name
3. Description - Plain text and appears when there is a list of the items.
4. Detailed Description - Available with a WYSIWIG Editor and appears when you are on that item page.
5. Requires Shipping Checkbox – Will designate if item uses shipping rules designated in the pricing attribute
6. Featured (Not in use now, you can ignore)
7. Stock Quantity – Number of items available. Will keep track of inventory and when Zero it will state product is out of stock.
8. Permissions - Designate who has access to view that item.
9. Fields – Added if you need to distinguish items based on criteria chosen by the user. For example, if you are selling t-shirts, you may want to add a field with the name Size and the values S, M, L, XL. Enter the values as a list of comma delimited options.
10. Prices - Can designate different prices per quantity, a discount, whether the item is taxable if purchased in the state configured in the shopping portlet, and shipping.

For example you can click the “Add Price” button () and it will create another pricing attribute to configure and you can set “Min Qty” = 1 and “Max Qty”= 9 at one price and then set the secondary price fields as set “Min Qty” = 10 and “Max Qty”= 1000 at a second price and those visitors who purchase 10 or more items will do so at the secondary price.

You can also set the different pricing levels at a shipping per item level or to use the default shipping formula configured in the shopping portlet by Closerware Support. **PLEASE NOTE:** If you set the shipping per item it will add that shipping amount to as many books as they purchase. For example if it is \$5 and they purchase 5 books, their shipping total for the purchase will be \$25.

11. Images – These are set for the following:
 - Small – Used when the items are listed in a category.
 - Medium - Used when you are on an item detail page
 - Large - Used as a large version of the medium image when on the detail page. Opens in a separate window.

The following screenshots detail the item attributes listed previously:



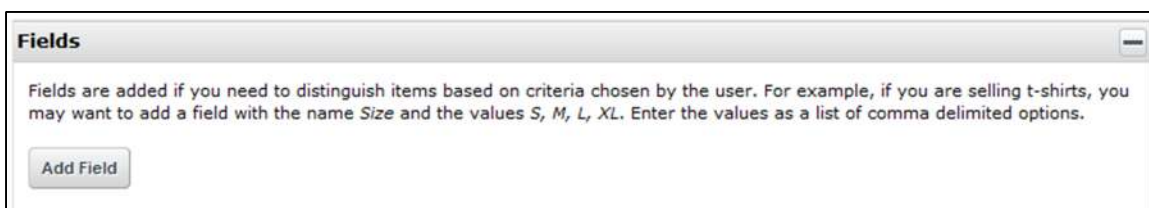
The screenshot shows the 'Item' form in the admin interface. At the top, there are tabs for 'Categories', 'Add', 'Orders', and 'Customers'. The form is titled 'Item' and has a 'Back' link. Below the title, there is a 'Categories + Select' dropdown. The form contains three main input areas: 'SKU' (a text field), 'Name' (a text field), and 'Description' (a large text area). Below the 'Description' field is a 'Detailed Description' section with a rich text editor toolbar containing various icons for text formatting and alignment. The rest of the form area is currently empty.

Adding Items: Attributes 1-4



This screenshot shows the lower portion of the 'Item' form. It includes two checkboxes: 'Requires Shipping' and 'Featured', both of which are currently unchecked. Below these is a 'Stock Quantity' section with a text input field containing the number '0'. The 'Permissions' section features a dropdown menu currently set to 'Anyone (Guest Role)' and a link labeled 'More Options' with a plus icon.

Adding Items: Attributes 5-8



The 'Fields' section is shown in a separate window. It has a title bar with the word 'Fields' and a close button. The main content is a text area with the following text: 'Fields are added if you need to distinguish items based on criteria chosen by the user. For example, if you are selling t-shirts, you may want to add a field with the name *Size* and the values *S, M, L, XL*. Enter the values as a list of comma delimited options.' Below the text area is a button labeled 'Add Field'.


Adding Items: Attribute 9




Adding Items: Attribute 10

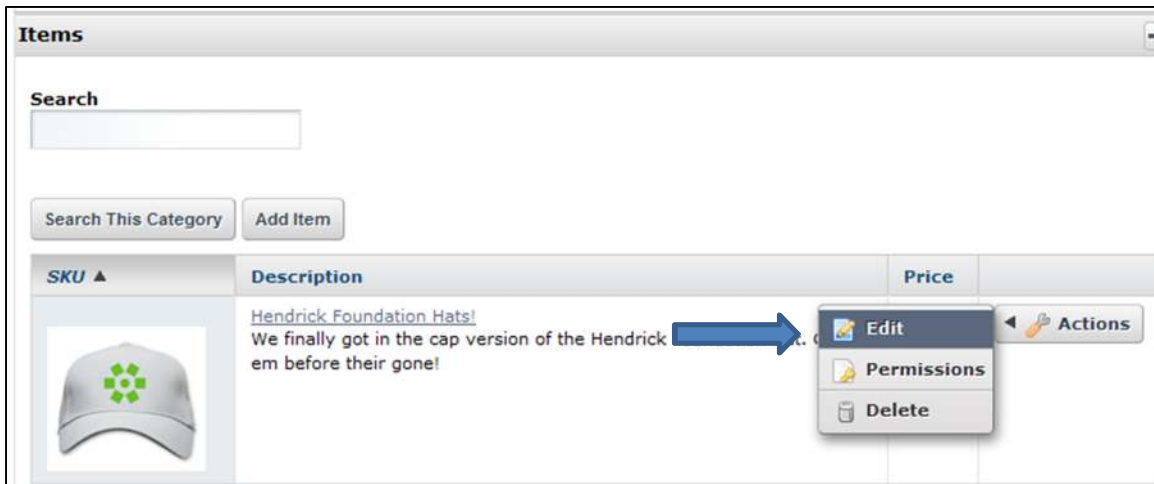


Adding Items: Attribute 11

Once you have your item attributes set you can click the “Save” button () that is below the “Permissions” attribute and then your item will be available on the website for purchase.

Editing:

To edit an existing item’s attributes you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you will locate the item you wish to edit and click the “Actions” button () and select “Edit”:




This will open the item page where you can edit all of the previously configured attributes (except for permissions) as well as the item's Category.

To change the category you will click the "Select" button under "Category":



This will open a new window which will allow you to navigate through your shopping portlet category structure and choose the item's location (category).



To modify an existing item's permissions you will locate the item whose permissions you wish to modify and click the "Actions" button () and select "Permissions":




After you have clicked the "Permissions" button you will be presented with a grid of permission choices/options of the item that you can update:

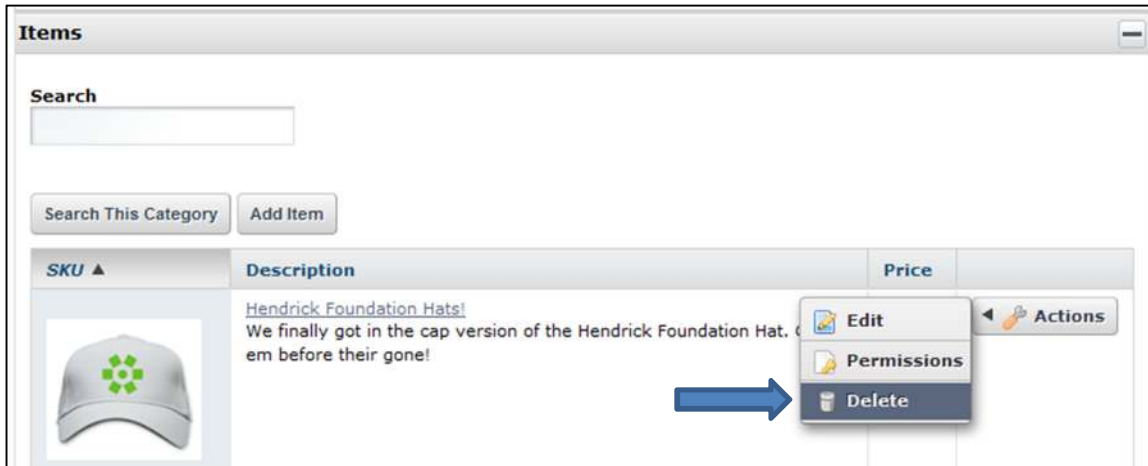
Role	Delete	Permissions	Update	View
Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Board	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Blog Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Calendar Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Content Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To make a public item, Member only, you will need to uncheck "View" from the Guest role and click "Save". To make a Member only item, public, you will need to check "View" for the Guest role and click "Save".

You can also make selections as to who has the ability to update the item, etc. For the most part you will only mark whether or not who can VIEW the folder. The rest of the settings will depend on the user's built-in permissions.


Deleting:

To delete an existing item you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you will locate the item you wish to delete and click the “Actions” button () and select the “Delete”:



Coupons

Adding:

You can create as many coupons as you wish within the Shopping Portlet. To create a coupon log into your VolunteerMatters Components site with the appropriate administrative access and navigate to your shopping page. There click on the “Add Coupon” button ().

Here you will configure the Coupons attributes:

1. **Code** – A numeric code for the coupon. Similar to an item’s “SKU”.
2. **Autogenerate Code Name** - If checked, the system will generate the code.
3. **Name** – The coupon’s name: What will be entered by the visitor during checkout. An example is "halfoff".
4. **Description** - A detailed explanation of the coupon.
5. **Start Date** - When the coupon becomes useable.
6. **Expiration Date** - When the coupon becomes unusable.
7. **Never Expire** - If checked the coupon will never become unusable.
8. **Active** - This attribute designates if the coupon is available (even if it is between its start and end date).


9. **Discount** - Coupons can be set to only apply to orders above a minimum amount. Set the minimum order to \$0.00 to add a coupon that applies to any purchase price.

Set the discount amount and the discount type. If the discount amount is 0.25 and the discount type is Percentage, then 25% is taken off the purchase price. If the discount type is Actual, then 25 cents is taken off the purchase price.

If the discount type is Free Shipping, then shipping charges are subtracted from the order. If the discount type is Tax Free, then tax charges are subtracted from the order.

10. **Limits** – There are two ways to limit a coupon:

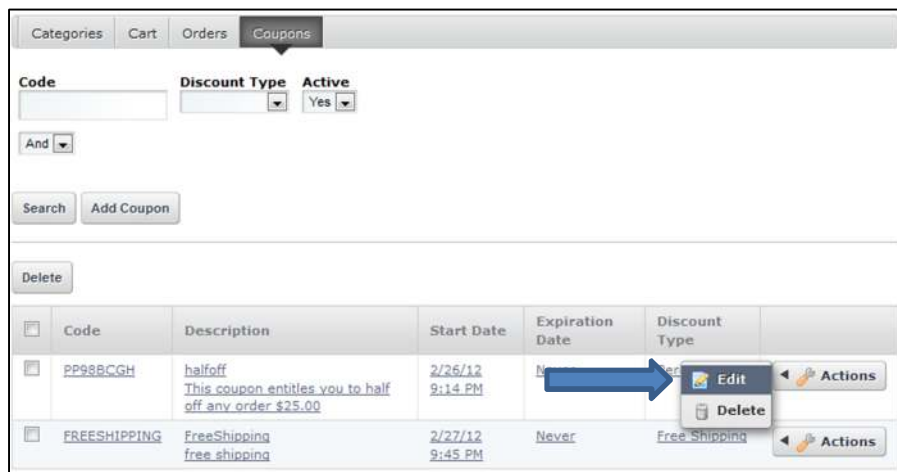
- This coupon only applies to items that are children of this comma delimited list of categories. Leave this blank if the coupon does not check for the parent categories of an item.
- This coupon only applies to items with a SKU that corresponds to this comma delimited list of item SKUs. Leave this blank if the coupon does not check for the item SKU.






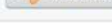
Once you have your coupon attributes set you can click the “Save” button () that is right above the “Discount” attribute and then your coupon will be available on the website for use.

Editing:

To edit an existing coupon’s attributes you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you click on the “Coupons” heading and then you will locate the coupon you wish to edit and click the “Actions” button


() and select “Edit”:

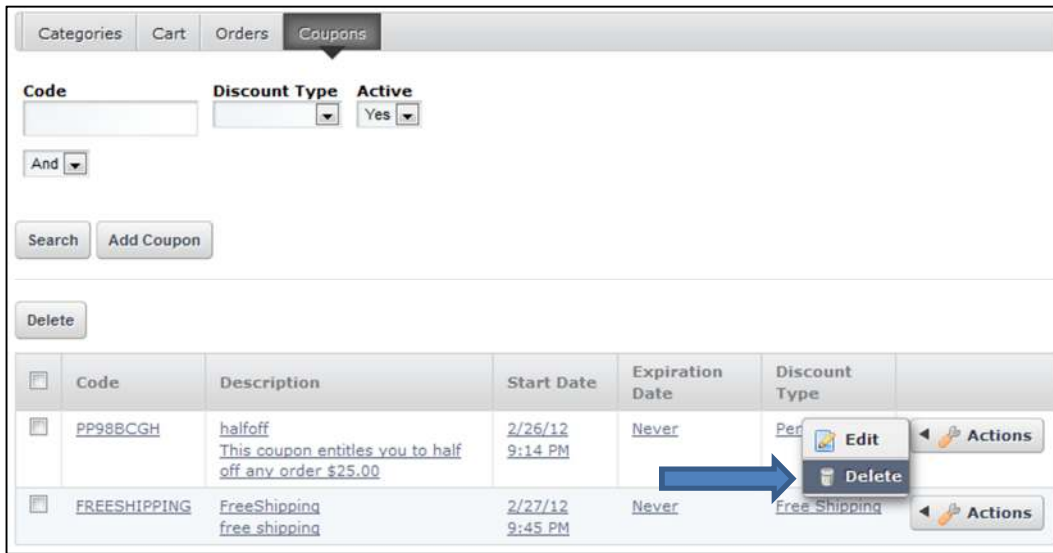




Code	Description	Start Date	Expiration Date	Discount Type	Actions
PP98BCGH	halfoff This coupon entitles you to half off any order \$25.00	2/26/12 9:14 PM	Never	Percentage	  
FREESHIPPING	FreeShipping free shipping	2/27/12 9:45 PM	Never	Free Shipping	  

This will open the item page where you can edit the all of the previously configured attributes (except for the code which is now fixed).

Deleting:

To delete an existing coupon you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you click on the “Coupons” heading and then you will locate the coupon you wish to delete and click the “Actions” button () and select the “Delete”:



Code	Description	Start Date	Expiration Date	Discount Type	Actions
PP98BCGH	halfoff This coupon entitles you to half off any order \$25.00	2/26/12 9:14 PM	Never	Per	 <ul style="list-style-type: none"> Edit Delete
FREESHIPPING	FreeShipping free shipping	2/27/12 9:45 PM	Never	Free Shipping	

You can also delete coupons in bulk by checking them off and clicking the “Delete” button ().

Managing Orders


As an administrator you can review and manage existing orders via the “Orders” heading on the shopping portlet page within your VolunteerMatters components Website:

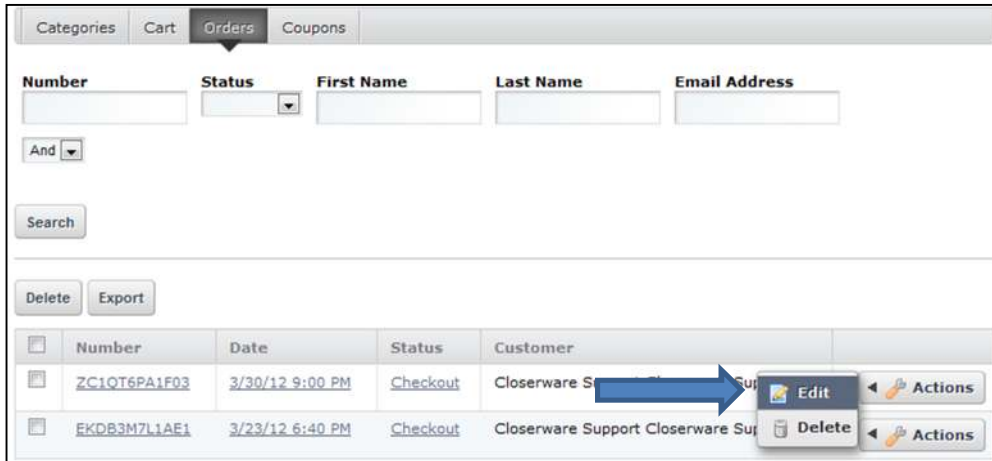


There you can “Edit” or “Delete” existing orders as well as produce a CSV export of your orders.

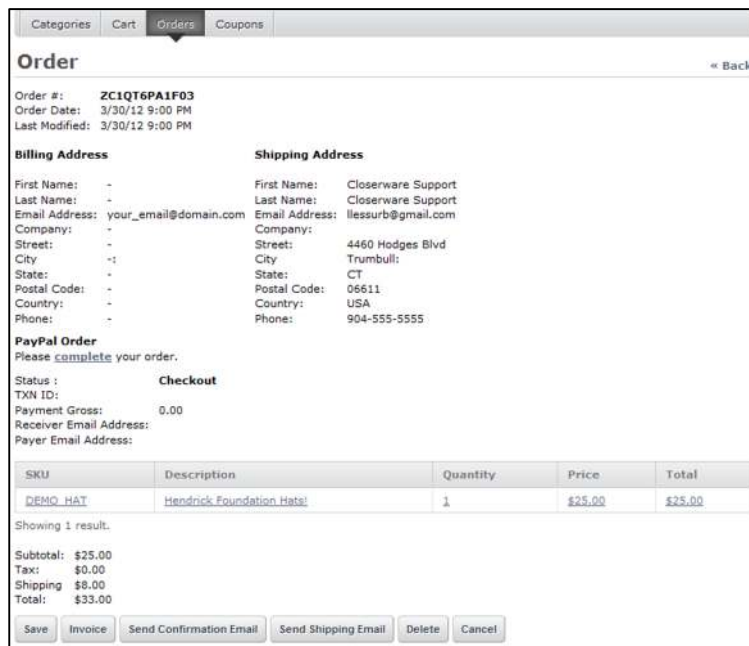
The “Orders” heading is available to all members but will only show their own previous orders if they do not have the “Site Shopping Manager” role set for them.

Editing:

To edit an existing order you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you click on the “Orders” heading and then you will locate the order you wish to edit and click the “Actions” button () and select “Edit”:

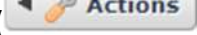


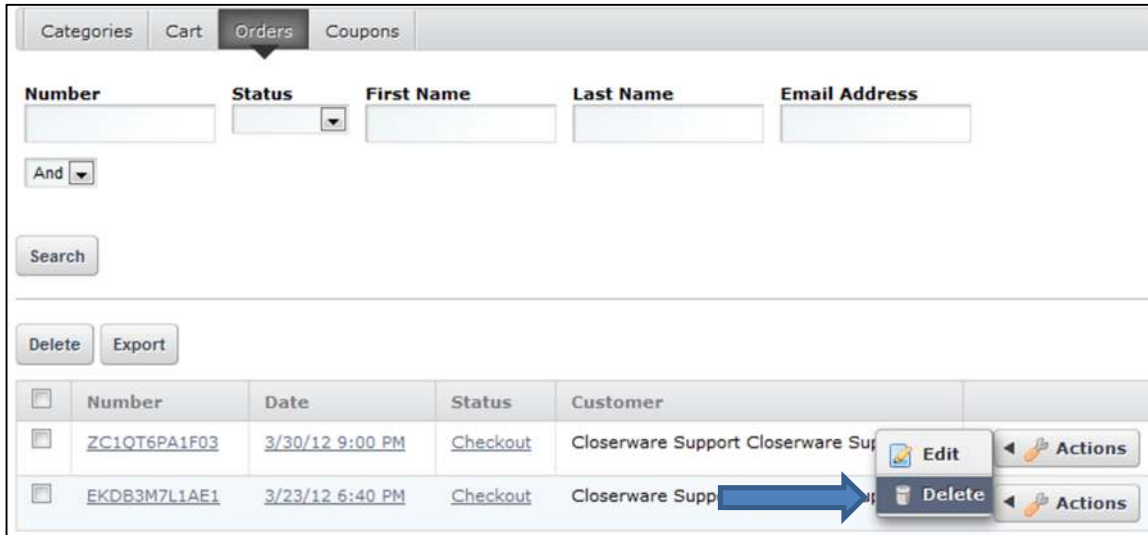
Here you can review the Order information as well as manually initiate “Confirmation” and “Shipping” emails, print an invoice with your logo, delete an order, or click on a link to complete an order that is not finished checking out.

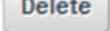


Deleting:

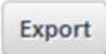
To delete an existing order you will log into VolunteerMatters Components with the appropriate administrative access and navigate to your shopping page. There you click on the “Orders” heading

and then you will locate the order you wish to delete and click the “Actions” button () and select “Delete”:



You can also delete orders in bulk by checking them off and clicking the “Delete” button ().

CSV Export:

As an administrator with the “Site Shopping Manager” role, when you are managing orders you will have an “Export” button () available to you to produce a CSV spreadsheet of your existing orders that are currently in your order list.

This export will only include those orders “Checked”. So you include or exclude orders as you see fit and return only exactly what you want in the spreadsheet.

PLEASE NOTE: Once you click the export button and produce a spreadsheet, it will remain ‘greyed-out’ until the page is refreshed.