Discovering Shropshire's History
Help sheet 2 – How to upload a resource

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Document Number:	Version 2
Release Date:	February 2007

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1.0   What this help sheet covers

This help sheet details:-

- How to upload a resource.
- How to manage resources.

2.0   What is a resource and what file formats are we allowed to upload to DSH server

A resource and formats allowed on DSH server are:-

A resource is a supporting document that can be linked or embedded onto another webpage or entity. The following resource file types can be uploaded onto the website.

Text based
Plain/Formatted Text as (.txt) files
DOC
RTF
PDF

Raster based
Jpg/Jpeg
Gif
PNG

Presentation
Power point PPS/PPT

Movies and Audio
MPEG Media File
WMV
Apple Quicktime (.avi, .mov, .qt)
Mpg
Waveform Audio File Format (.wav)
ISO-MPEG Audio Layer-3 (.mp3)

Compression
Winzip

When dealing with raster images the following resolutions are allowed:

Small: Up to 220 pixels width. Can be embedded into a webpage
Medium: Up to 500 pixels width
Large: Up to 520 pixels width. These should not be embedded onto a webpage.

Images for Hot-click Maps
- If an image meant for a hot click map ask your administrator to upload it into the maps directory.
- If an image that is meant to be used as a hot click map it can be a maximum 710 width in pixels.

Images for Logos
- When uploading a logo an administrator must do it and the file must be uploaded into the logo directory.

Images for Watermarks
- When uploading a watermark an administrator must do it and the file must be uploaded into the watermark directory.

Images Banners
- When uploading a banner an administrator must do it and the file must be uploaded into the banner directory.

Please do not try to upload any other types of resource or file formats than otherwise indicated in the table above.

You must log in to upload a resource (See help sheet no 1 for instructions on logging in).

Depending on your user level you will see a different menu options.

<u>Remember</u>
- The types of records to edit will appear based on your rights as a user.
- The admin menu allows you to create and edit content on the website.
- The left-hand side navigation expands and collapses when you single left click on it.
- Make your content meaningful and provide good titles.

    When filling in fields consider what a user will see, provide meaningful page titles.

"Painting" is not acceptable Instead use "Painting of Shrewsbury c1630"

Once you are logged in you will see the admin menu.
The admin menu shows: -
- A disk quota summary
- Options for managing, editing and creating content
- Options for managing users
- Options for managing the system
- Changes to the system
- Access to records is based on your memberships of the groups your user profile has assigned.
- Webmasters see all content.
- Resources are always live no matter what access rights you have.

Figure 1: Admin menu

3.0   Resources menu

In the menu select "manage resources"

3.1 Managing your resources through the resources menu

- If you have no resources uploaded it will be blank and all you can see is the "create new one" link.

List Resources

No records. Create a New One

Figure 2: Empty resources menu

- If you have already uploaded some images they will list with the title and description fields and a thumbnail (if it's an image or an icon of the file type).

ID	Title	Description	Preview	Size	New
8160	New Resource	a1.3		84.09 KB	
5947	Tudor Shrewsbury	This is the whole Tudor Shrewsbury Reconstruction map		52.05 KB	
5945	Small HLF High Impact Logo	This is a small version of the Heritage Lottery Fund Logo to be used on webpages. The HLF is one of...		7.17 KB	
5610	Orangeleaf Logo	New Resource Description		2.23 KB	
5611	Orangeleaf Watermark	New Resource Description		880 bytes	

Records 0 to 15 (total records 3063). View Page 1 (total pages 205)

Figure 3: Resources menu with resources in

The search window at the top allows you to search for records to edit. Type in a keyword and single left click on filter this will search the records you can edit.

Show all will list all records that you have the rights to edit.

If there are more records that can be displayed on a page then you can select further pages by dropping down the page look up and selecting a page.

- You can delete your records from this list (please note once deleted you cannot bring the resource back).
- All uploaded resources must have a record attached. The record is called a meta-data record it contains information about the resource.
- To edit an existing record click on the edit button and the record will open.

Figure 4: Edit existing record icon

- To delete a record single left click on the delete icon please note it will ask for confirmation.
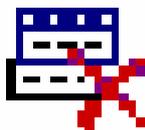
Figure 5: Delete an existing record icon

3.2 Saving your record
You can find the save button at the bottom of the screen

Please make sure you save your record at regular intervals by a single left click on the save button at the bottom of the screen. The system will confirm that it has been saved at the top.

If you save a new record it will tell you it has saved

Information

- Record inserted
- Record indexed [detail...]

Figure 6: Saving new record

If you edit an existing record the message will be slightly different

Information

- Record updated
- Record indexed [detail...]
- Previous version archived.

Figure 7: Saving an edited record

4.0   Creating a new record

4.1   Opening a new blank record

Single left click on a new button. A blank record will open up. Note all resources uploaded must have a record. The resource record hold key information that allows people to search for the resource that you upload so the more fields you fill in the easier your image can be found.

Figure 8: New resource record

4.2   Editing the record

1. Once the new record is open you can start to edit the record. You must fill in the following fields

Field name	
Dc:identifier	Automatically done by the system
Dc:title	Please put in no more than 255 words. Make the title meaningful. "watermark for Newport History Society" "Small Logo for Friends of Much Wenlock" "NW view of Bury Ditches"
Dc:creator	Automatically done by the system
Dc:date	Automatically done by the system
Dc:description	You can put as much text in this field as you wish
Dc:rights	This is the owner of the copyright
DC:format	Automatically done by the system
Dc:language	Automatically done by the system
Dc:subject	Please put in at least one subject

- If you are not sure what to put in a field hover your mouse cursor over the help icons and a pop up help will appear.

Figure 9: Help icon

- You should note some fields such as
  DC:Language
  DC:Source
  DC:Subject
  Portal link
  Themes link
  Imported records link
  Group's link

  Allow you to add one or more entries, if you wish to add another entry click on the plus icon if you wish to remove an entry press the minus icon.
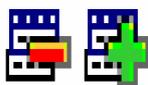
Figure 10: Add another entry

4.3   Uploading the Resource

2. Once you have filled in the fields above single left click plus button on the resource section. Note if you click on the plus button again it will close/collapse the resource section.

Figure 11: Uploading a resource

- The resource section will expand and open up.
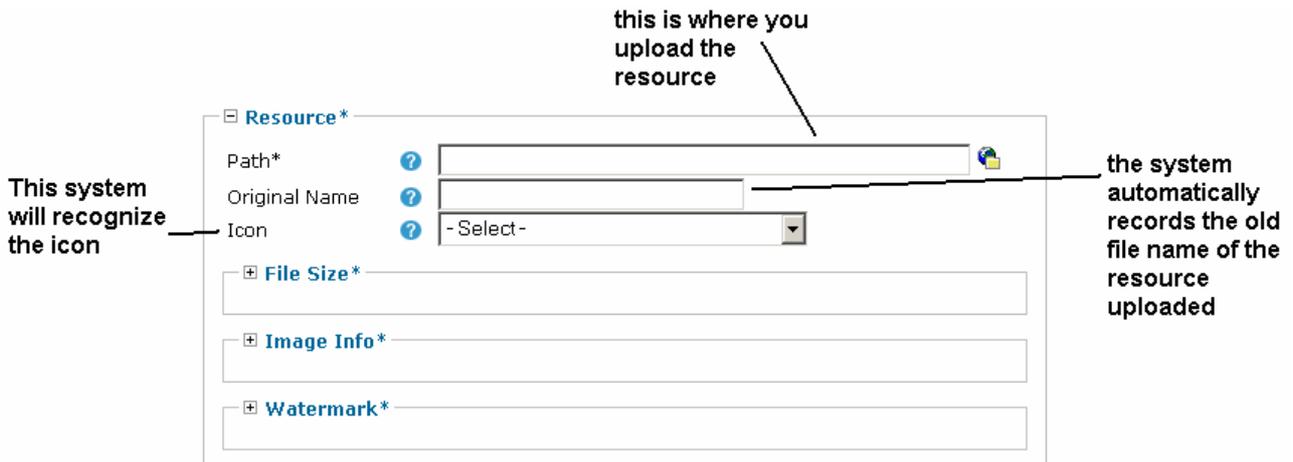
Figure 12: Resource section

- This is where you will upload the resource to the record. To understand this when you are creating a resource it works in the following manner:-

  The resource record and the resource have a one to one relationship. In other words the resource record contains the resource. The Resource record is often terms as the metadata record about resource.

- You will note the resource section has a 3 other sections within it
  File size
  Image info
  Watermark

  You can ignore these fields for now

Figure 13: Resource section expanded fully

3. In the resource section click on the upload icon in the path field

Figure 14: Upload icon

4. The resource upload window will now pop up
   - Note the folder options these are your folders on the DSH server. You can upload your resources into these folders.
   - Please upload your resources into the appropriate folder it's a word or pdf document then select the documents folder.
   - To select a directory to upload into single left click in circle next to the folder name.

Figure 15: Resource upload window

- Notice the + icon next to images. If you are uploading an image please expand this and select either from the small medium or large directory. See Appendix B for the size guide for images.

  PLEASE DO NOT USE THE ROUTE DIRECTORY OF IMAGES TO UPLOAD YOUR IMAGES TO THE SERVER.
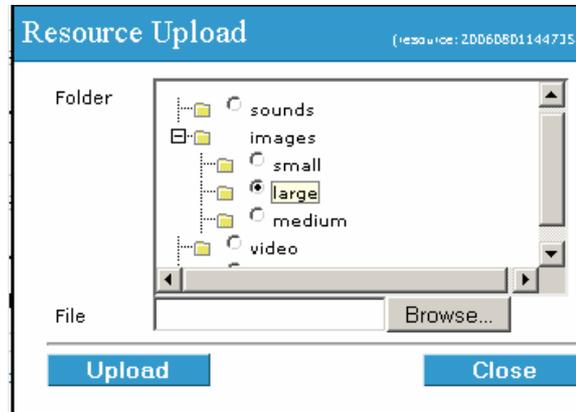
Figure 16: Resource upload window expanded

5. The browse button in the resource upload window will allow you to open up any directory on your home computer and browse to any file.
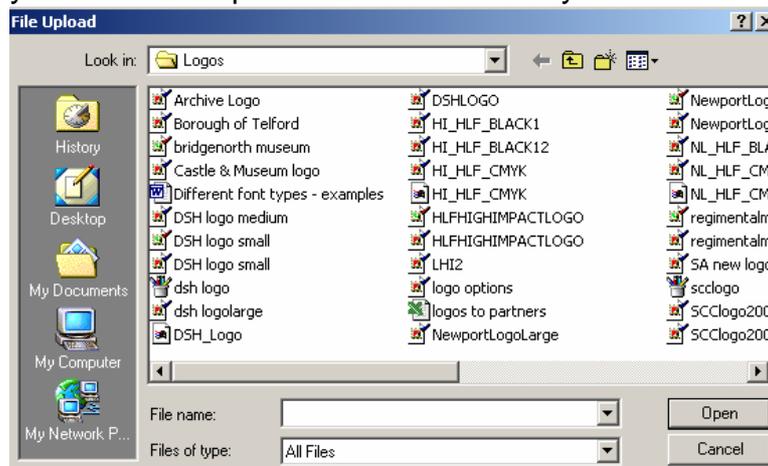
Figure 17: File upload window

- Note if you are uploading a map or image to be used in the hot click map system please contact your group administrator or a webmaster who will upload it into the maps directory which they have sole access to.
- Note if you want to upload a Logo or watermark please contact an group administrator or a webmaster who will upload it into the maps directory which they have sole access to.

6. Once you have selected the file click on open and the file will be written in the file field.
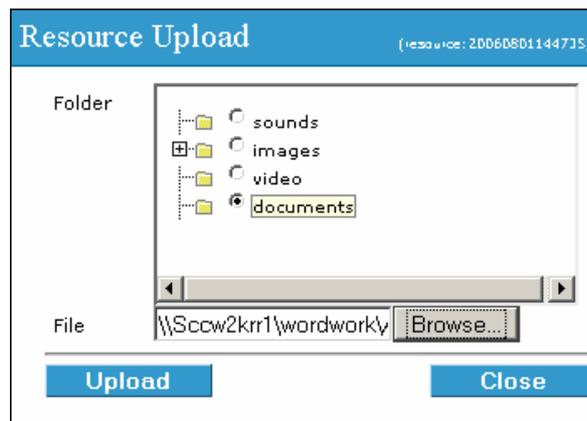
Figure 18: Resource upload window selecting a directory

7. Once you have selected the folder on DSH server and the file you wish to upload single left click on the upload button.

- The system will confirm the file has been uploaded.
- It is possible to overwrite an existing file and the system will over write the file and replace it with the new one. Note this should only be done if it's the same file but you wanted to make some changes to it. It will change the resource on all pages you have attached, embedded it on. This can be useful if an image is out of date or is too large to fit on a page.

YOU SHOULD NOT REPLACE A FILE WITH A COMPLETELY DIFFERENT RESOURCE.

- Some resources will be prevented from being uploaded the system will say why it is preventing them. However this can be for reason such as the image is too large or it's the wrong file format.
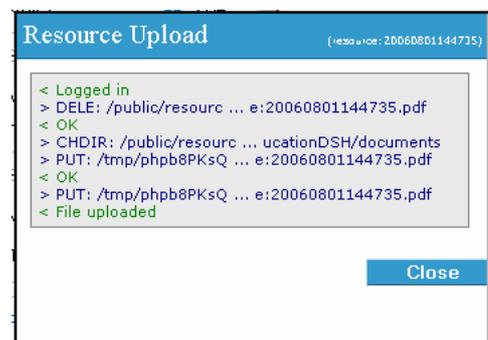
Figure 19: Confirmation of file upload and overwrite

8. You will note that once the file is uploaded there will be a number of fields filled in:-
    - For any resource other than images the system will fill in the following fields automatically
        Path
        Original File name
        File size (units and value)
        Dc:format

For images the following fields are filled in automatically
- Path
- Original File name
- File size (units and value)
- Width and Height
  (if these are not the image has not been maximised for the internet and it should be maximised for the internet then re-uploaded.
- Dc:format

Note if it is anything other than an image you must select the appropriate Icon in the ICON field.

IF YOU DO NOT THEN THE SYSTEM WILL NOT KNOW WHAT KIND OF FILE IT IS.

Figure 20: Fields filled in on upload

4.3.1 Applying a water mark or text copyright to an image

- In the resource section is a set of fields called watermark. This allows you to apply a water mark to an image. This is useful if you wish to add protect your images from unwanted use.
- Note the water mark file must be a gif format and is found in the watermarks directory that an administrator can access.
- You can apply two types of water mark a text watermark or an image watermark.
- To apply a text watermark type the desired text in the value field. Then select text in the drop down type field.

Figure 21: Watermark section

It should look like this

Figure 22: Text used as a watermark

- If you wish to select a image to act as your watermark for the image drop down the type and select resource. Then click on the link resource icon

Figure 23: link resource icon

- The resource browser will open up, the browser works just like windows explorer. Navigate to the watermarks directory. To select the watermark that you want single left click on it and you will see the path is written into the value field.

Figure 24: Resource Browser

It should look something like this

Figure 25: A Resource applied as a watermark

4.4 Assigning the resource to a portal
DSH administration does not recommend using this link. It is far better to attach resources through sections (see help sheet no 3- creating webpages).

4.5   Assigning the resource to a theme

DSH administration does not recommend using this link. It is far better to attach resources through sections (see help sheet no 3- creating webpages).

4.6   Assigning the resource to an imported record

Optional

The imported records are derived from databases that are off line these include the SMR, Calm and Museums records. It is possible to link resources to these records even though you cannot edit them.

1.   Single left click on plus button in the imported records section. Note if you click on the plus button again it will close/collapse the imported records section.
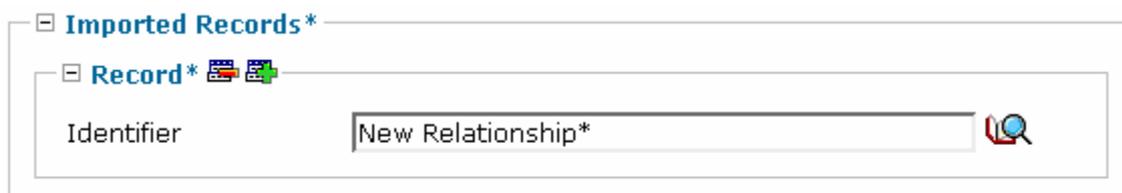
Figure 26: Imported records section

2.   Note the plus and minus options (see section 4.2 for advice about these icons) now click on the search icon.

Figure 27: Search icon

3.   The object picker window will now open. You can use the search engine to find the imported database record you wish to link the resource to.

Figure 28: Object picker

- To run a search type in a key word of the record you're looking for and single left click on the find button.
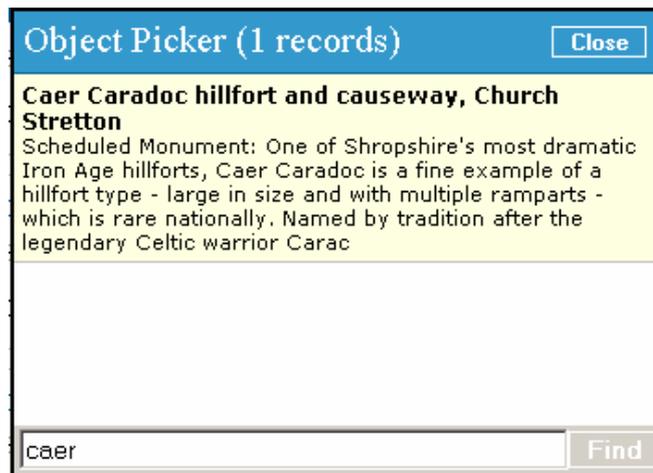
Figure 29: the matches returned

- The system will return the matching records to your search and list them for you. To select one to attach hover your mouse over your desired record the cursor should change to a hand then single left click. You will see that the title is written into the field. It should look something like this
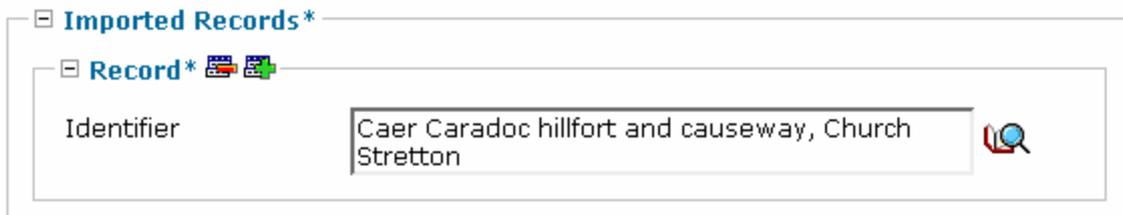
Figure 30: A resource attached to an imported record

Remember by clicking on the plus icon you can add another link to a different record. To remove an entry click on the minus button.

4.7   Assigning the resource to a group

YOU MUST ASSIGN A GROUP TO ALL RESOURCES OR YOU WILL NOT BE ABLE TO FIND THEM AFTER YOU SAVE.

Assigning a group to the resource applies a group template.

Apply the group will apply a logo and a group look and feel to the webpage that the image is displayed on.

To select a group follow these steps
1.   Drop down the list by clicking on the down arrow on the right hand side. A list of groups will appear select one by a single left click.

SAVE THE RECORD BY CLICKING ON SAVE AT THE BOTTOM OF THE FORM

4.10   Locking a resource to a group

It is possible to lock pages to a group (or groups) that are associated with the content. Being locked means only members logged in can view the page or content.

Locked to Groups   Unlocked ▼

Figure 31: Locked to groups

5.0   Preview content as a webpage

It is possible to view your content whatever it is as a page prior to publishing. In the top right hand corner of an edit page form is an icon that looks like a page with a magnifying glass. If you single left click a new browser will open showing a preview of the image.

Add webpage preview
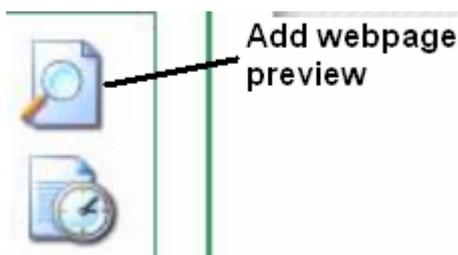
Figure 32: Preview icon

6.0   Making content live as a Content Provider

A content provider cannot make content live on the Internet without a group administrator or webmaster approving it first.

Any edit or creation you make sends an email to administrators. They will review your content then make it live. You can carry on editing it but your content will not appear until it is made live.

Please be patient with administrators they will make your content live as soon as they possibly can.

7.0   Archive copies of previous versions of your records

The system automatically saves the any changes you make to an existing record. Make sure you have saved your record before you go to the view history page.

1.   Click on the icon in the top right hand corner of the record.

Edit Resources

Information
- Record inserted
- Record indexed

DSH:Record*

DC:Identifier   ❓ resource:20060801174625

single left click on the icon
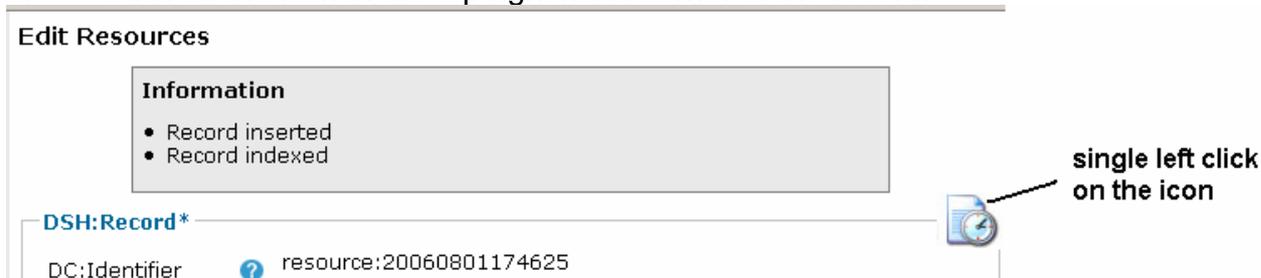
Figure 33: Record archive icon

2.   The history will now open up.

View History

ID	Date/Time	User		
505	2006-08-01 17:53:52	Phil Scoggins	Restore	Preview

Figure 34: viewing the record archive

- You are able to preview the old record or restore the old record single left click to preview will open up a pop up window that shows the native XML record.
- If you do not wish to restore any old record click web history item that says "edit record…"

Webpage History : DSH Home : Admin Menu : Resources Listing : Edit Record 5978 :

Figure 35: Click on webpage history to return to the record when in the record history

- To restore the old version single left click on the restore command. You will be asked if you are sure. It will then return you to the record in its old form.

Edit Resources

Record restored

No Archived Versions Found

DSH:Record*

DC:Identifier	❷	resource:20060801161806
DC:Title*	❷	New Resource
DC:Creator	❷	Phil Scoggins
DC:Date	❷	2006-08-01 YYYY-MM-DD

Figure 36: Confirmation that the record archive has been restored

MAKE SURE YOU SAVE THE RECORD

Appendix A: Administrator functions for uploading resources

Note RESOURCES ARE ALWAYS LIVE, THEY DO NOT NEED MAKING LIVE.

As a Group Administrator or Webmaster you have several more abilities that content providers do not.

A.1 Approving content one record at a time

1. Your form for creating homepages has one extra field, which is called Status. This field is for making content live or not live so it will appear on the Internet. As an administrator when you create something it is always set as live
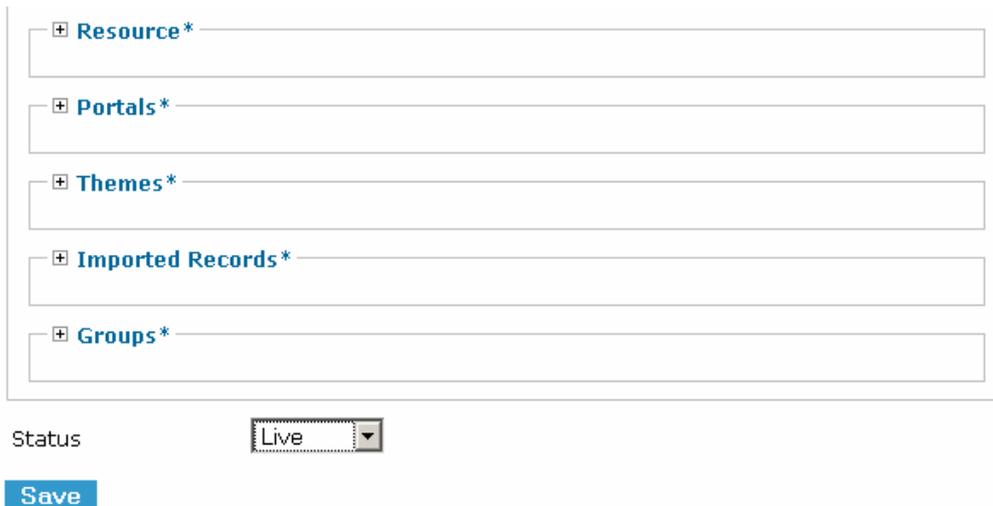
Figure 37: Status field

- To assign any record on DSH as live simply drop down the lookup and select live. If you wish to stop any content appearing select not live.
- Make sure you save the change.

A.2 Quick approve

The quick approve can find found in the administrators menu when you log in as an administrator. You will find the quick approve menu under the utilities menu on the left-hand side.

Figure 38: Utilities

1. Single left click on the quick approve function. A window will now open up if there is content to be approved it will be listed. You can click on the tick box and press approve to approve many items. Any items you approve will be removed from the list.

Quick Approve

Title	description	created	Creator	Approve
Maps	New Resource Description	2006-08-01 18:28:52	Phil Scoggins	☐

Figure 39: Quick approve utility

2.   You can preview the content of the item by clicking on the blue title a preview window will open up. You can approve the content at that point. Once you approve a item in the preview it will take it from the list and return you back to the list.

Quick Approve: Maps (Preview)

Title

Maps

Description

New Resource Description

[Approve]

Figure 40: Quick approve preview

A.3   Approving content from a list

It is possible to go to each record type such as homepages and see a list of records. As a Webmaster or Group Administrator you will see green ticks and red crosses in the status record for each record listed. Click on one of these and the status will change.

A homepage should be treated as your main page for your group, society or project. This should be used sparingly with webpage/themes linked to the homepage. To construct your website you would create a homepage and link one or more webpage/themes to your homepage. You can also link webpage to other webpages.

Search

Identifier OR Title

[   ]

Filter   Show All

Records 0 to 15 (total records 88). View Page [1 v] (total pages 6)

ID	Title	Description	Status	Creator	New	
5962	Help and Support	Welcome to Help and Support	☑	System Administrator	📝	🖥
6021	Market Drayton Museum & Resource Centre 'The Story of Drayton'	Welcome to the Market Drayton Museum Homepage. You will be able to find all about the museum its his...	☒	Carol Chapman	📝	🖥
6163	Four Parishes Heritage Group	Welcome to the Four Parishes Heritage Group homepage. Funded by the LHI you will find out all about ...	☑	David Poyner	📝	🖥
6165	Shropshire County Council Archaeology Service	Welcome to the Shropshire County Council Archaeology Service's homepage, where you can find out abou...	☑	Hugh Hannaford	📝	🖥
6167	Shropshire Regimental Museum	Welcome to the Shropshire Regimental Museum homepage. The Regimental Museum was established in 1985	☑	Peter Duckers	📝	🖥

Figure 41: Approve content from a list

A.3   Uploading Administration content

As administrators you can get to more directories on the DSH server. You have the same functions and follow the same practices as a content provider however you have access to system directories.
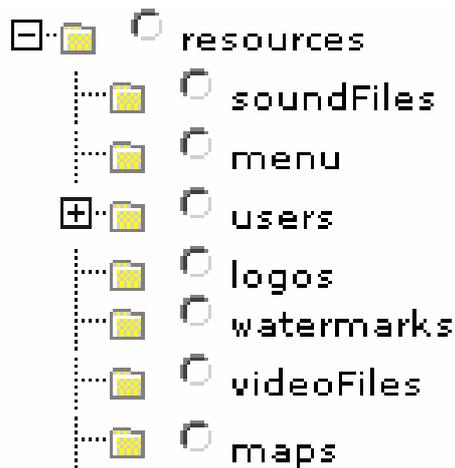
Figure 42: Directories available to administrators

1. These directories are only available to you to upload onto the server. They can be seen by anyone through the resource browser. However only an administrator can add or edit the resources to these directories.

    *   Menu
        This is intended for menu images these must be in this directory as they are system files and must not be deleted.

    *   Users
        This is the directory where all users have their folders. So you can add your own files to other user's folders if you wished. Note when you are uploading resources you should you your own directories which you can find in the users directory.

    *   Logos
        This is where all logos should be put. If you wish to upload a logo for a webpage plus use a small image. See Appendix B. All logo files must be in this directory as they are system files and must not be deleted.

    *   Watermarks
        These must be gif files. All watermarks must be in this directory as they are system files and must not be deleted.

    *   Maps
        Maps are a specialised directory meant for any image that is intended to be used in a hot click map. Such images must be an exact format and size.

Note the uploading of resources to these directories run in the same way as detailed in section 4 of this document.

Appendix B: The size guide for images

It is generally better to concentrate on getting the image width looking right than the height

Small images

A good size for small images is approximately

	Pixels
	Pixels
Width	120 - 160
Height	as required

Example:-

These would be used for logos or to embed on a webpage.

Medium images

A good size for medium images is approximately

	Pixels
Width	250 – 300 as required
Height	as required

Example:-

These would be used for embedding on a webpage

Large images

A good size for large images is

	Pixels
Width	501
Height	max 800

However with large images especially it is best to aim for the minimum file size you can use to achieve this pixel width. This is because the larger the file size the longer it takes to download.

Example:-

You can create internal links between small and medium images embedded in web pages and a large image of the same picture in resources.

Map images

When creating large images for use in hot click maps, or similar, the right size to use is 700 pixels width. It is possible to create larger images for this use because on map pages there is no side menu bar.

N.B. Because there is no side menu bar on map pages, to aid navigation it is a good idea to create an internal link for the map page back to any theme or homepages it is accessed from.