PMI-MILWAUKEE CHAPTER WEB SITE

User Documentation

Prepared by Lyons Digital Media, LLC
July 2009

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Project Background

The PMI-Milwaukee Chapter Web site was developed in May and July 2009 by Lyons Digital Media, LLC. The key features of the Web site are as follows:

- Content management
- File management
- Online membership and event management

Software

The Web site, http://www.pmi-milwaukee.org is based on Drupal content management system and CiviCRM.

The PMI-Milwaukee Chapter Web site is best viewed in Internet Explorer version 7.x and higher; Firefox version 3.x and higher; and Safari version 3.x and higher.

Hosting Environment

The Content Management System (CMS) and its extensions are hosted in a LAMP (Linux, Apache, MySQL and PHP) environment where all the key software components of the server, including operating system, database and scripting language are all Open Source Software (OSS) licensed under the Gnu Public License (GPL).

Technical Support

Please contact Lyonshost Support at support@lyonshost.com or 850-942-9442 if you have questions regarding the PMI-Milwaukee Chapter Web site or to report a problem.

About this Document

The document is to be used as a supplement to the documentation provided by Drupal and CiviCRM. This document includes instructions for frequently used features of the PMI-Milwaukee Chapter Web site as well as features that were created or modified for PMI-Milwaukee Chapter.

It is strongly recommended that Administrative users familiarize themselves with Drupal's base features and functions.

Cross-references are used through out the document and will allow the reader to navigate the document whether they are viewing the document in Acrobat Reader or in printed format. The following conventions are used throughout the document:

Clickable – indicates a link or icon to be clicked with the cursor (mouse)

Emphasis – indicates the title of a page, field or section of a Web page

Hyperlink – text that appears blue and underlined is cross referenced to another section of the document. Click the link to visit the page indicated.

Select – indicates an item to be chosen from a drop down list or a menu option.

Click – indicates the user should use his/her cursor to click a button, check box or other element on the screen.

For All PMI Milwaukee Site Users

Log in to the PMI-Milwaukee Chapter Web Site

To log in to the PMI-Milwaukee Chapter Web site, follow these instructions:

1. To access the PMI-Milwaukee Chapter Web site as a registered member, open your preferred Web browser and type in the following into the address bar: http://www.pmi-milwaukee.org

2. The Web site will load.

3. On the right side of the screen, you will see the User Login area.

4. Type your **Username** and **Password** into the fields provided.

5. Click **Log in**.

6. The **Home** page will display.

7. Registered members will have a user menu. Administration team members will have two Admin menus from which to choose.
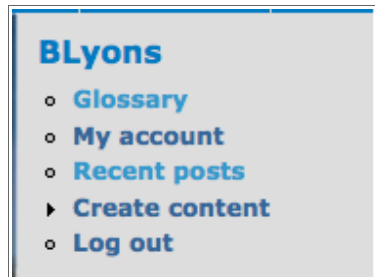
User Menu   **Admin Menu**

Resetting Login Credentials

In the event a registered user forgets their username or password, they can have the system send login information to the e-mail account on file for the user.

1. To access the PMI-Milwaukee Chapter Web site as a registered member, open your preferred Web browser and type in the following into the address bar: http://www.pmi-milwaukee.org

2. The Web site will load.
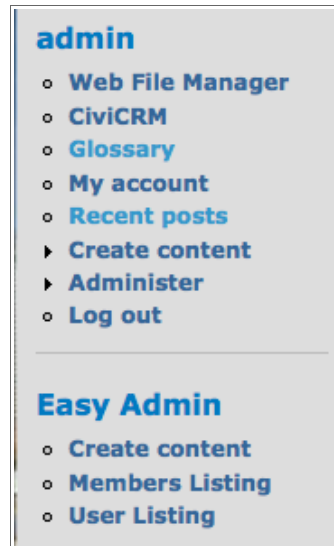
3. On the right side of the screen, you will see the User Login area.

4. Click **Request new password**. The User Account page will display.

5. In the field provided, enter your Web site username or the e-mail address associated with your site account.

6. For security reasons, enter the correct text in the Captcha field.

7. Click **E-mail new password**.

8. Retrieve your e-mail. A message titled "Replacement login information for XXXX at MILWAUKEE / SOUTHEAST WI CHAPTER" will appear in your Inbox.
9. Follow the instructions in the e-mail to login and reset your password.

Working with Images

You can add a photograph of yourself to your PMI-Milwaukee user account. These images are commonly called avatars.

Avatar images must be created to the following specifications:

- No larger than 85 pixels in either direction
- 72 dpi

Here is an example of an image in the correct dimensions and resolution:

85 pixels tall

84 pixels wide

There are many image editing programs available. Below is a partial list of products that can be used.

Name	Platform
Photoshop	Windows or Mac
Photoshop Elements	Windows
The GIMP	Windows or Mac (Free)
Paint Shop Pro	Windows
Pixelmator	Mac

The instructions in this document are for using GIMP, a free image editing program available for Windows and Mac. If you are familiar with another image editing program, you should be able to modify the instructions for your application.

Creating Avatar Images

1. Open GIMP.

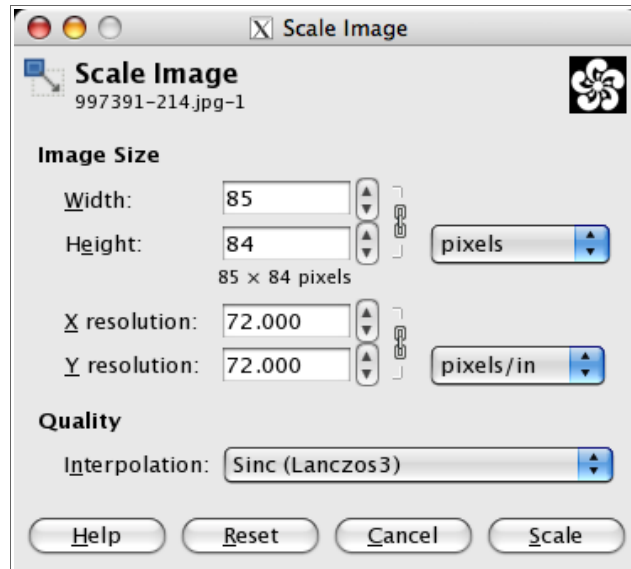2. Select **File**>**Open**.

3. Browse and select the image to be edited.

4. Click **Open**. The image will open, as shown below.
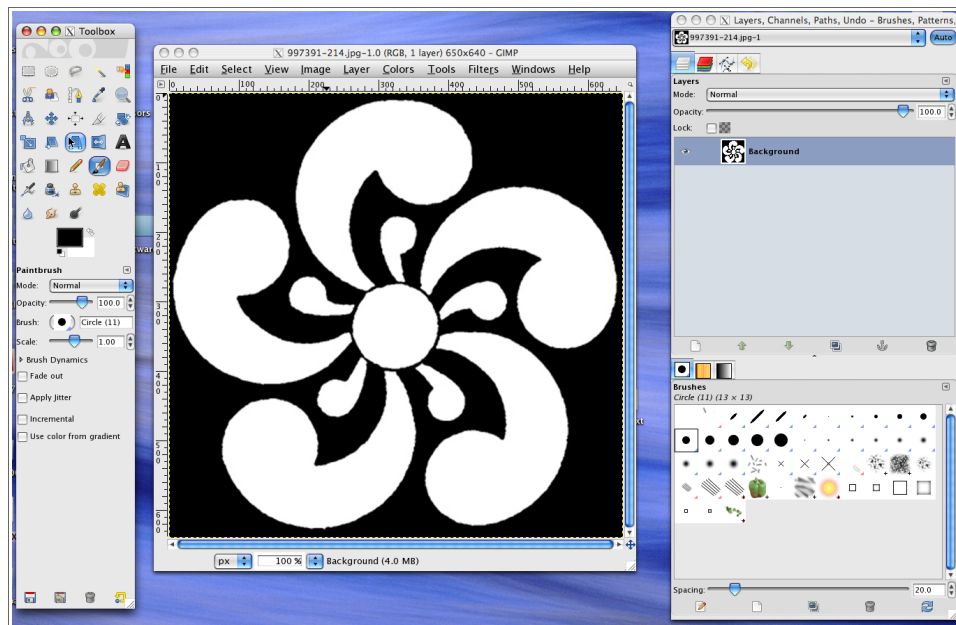
5. To resize the image, select **Image>Scale Image**. The Scale Image dialog box will display.

6. Change the **Height** to 85 pixels.

> **Note** If changing the height to 85 results in a width greater than 85 pixels, change the width to 85.

7. Verify that the **Resolution** is set to 72.000 pixels/in.

8. Click **Scale**. The image size will be reduced.

9. Select **File>Save As**.

10. If desired, rename the file in the **Name** field.

11. Navigate to the folder into which the file should be stored.

> **Note** You may want to create a specific folder on your computer to store these images.

12. Expand the section **Select File Type (by extension)**.

13. Select **JPEG**.

14. Click **Save**. The Save as JPEG dialog box will display.
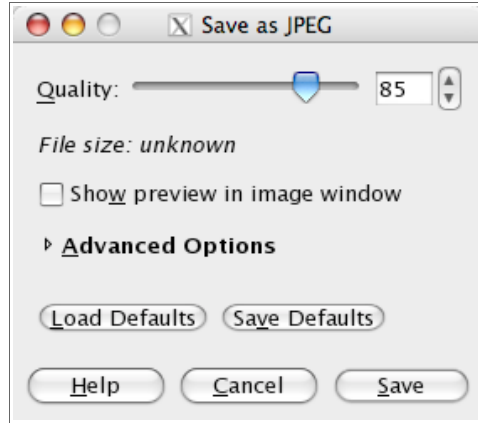
15. Click **Save**.

16. Select **File>Quit**.

Glossary

Below is a list of terms commonly used in this document or in the PMI-Milwaukee Web site.

| Term	Description
Administration Area	The password-protected administration area of a Drupal Web site. Only users assigned Administrator or Super-Administrator status can access this area.
CMS	Content Management System – a dynamic, database driven Web site.
CSV	Comma Separated Value. A file format used to organize text data in tabular format. Lines of information are separated by commas. This data file can be easily imported into most spreadsheet and database programs for additional manipulation.
Directory	A listing of PMI-Milwaukee Chapter region categories, sub-categories and listings.
GIMP	The GNU Image Manipulation Program, a free image editing program for Windows and Mac computers.
Icon	A graphic symbol (usually a simple picture) that denotes a program or a command
Drupal	The CMS application used for the PMI-Milwaukee Chapter project.
Login	The process of accessing a Web site by entering a username and password in the provided fields.
Log out	The process of signing out of a Web site.
META Data and META keywords	Metadata is information about a content item that is not displayed but is available to Search Engines and other systems to classify the content item. Excellent documentation on using the META fields in Joomla is available in the Joomla! Help under the topic Article Manager: New/Edit.

Term	Description
Open Source Software	Open source is a development method for software that harnesses the power of distributed peer review and transparency of process. From Opensource.org.
Pane	A term used to divide a Web page into discreet sections.
Pixel	One picture element. The smallest discrete element which makes up an image.
Thumbnail Image	A small image used as a placeholder or icon.
Toolbar	A collection of icons grouped together on a Web page or within an application.
URL	Universal Resource Locator – another name for a Web site address.
WYSIWYG	An acronym for **W**hat **Y**ou **S**ee is **W**hat **Y**ou **G**et. Describes a system in which content displayed during editing appears very similar to the final output.

For PMI Milwaukee Members

The User Menu

The User Menu is only visible once a registered user has logged in to the PMI-Milwaukee Chapter Web site. The following options are currently available:
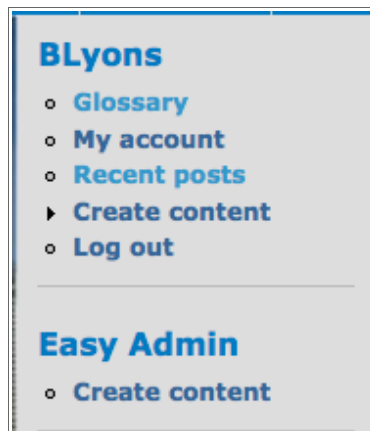
- ssary
- **My account**. Your user account information. Refer to <u>My Account</u> on page 13.
- **Recent Posts**. The most recent content items and files added to the site. To view any of the items, click the item's **Title**.
- **Create Content**. Create a job posting, resume posting, or meeting minutes. Refer to <u>Creating Content</u> on page 14.
- **Log out**. Click the Logout link to end your Web site session.

My Account – User

The *My Account* link gives a registered user the ability to change their display name, e-mail address, and password. If a user changes their password, they will be required to reenter the password to verify it.

1. From the User Menu, click the **My Account** link to access your account page.

2. click the **Edit** tab and make the desired changes. The available *Account* fields are as follows:

   ◦ *Username*

   ◦ *E-mail address*

   ◦ *Password / Confirm Password*

◦ *Signature Settings*. You may enter contact information or other text. This text will automatically be added to your comment posts on the Web site. You may format the text using the <u>WYSIWYG</u> tools provided.
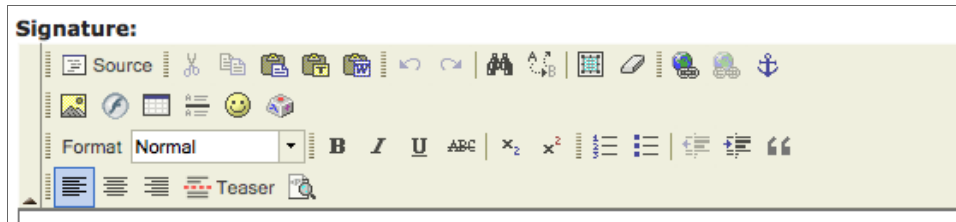
◦ *Picture*. You may upload a digital image file that will be associated with your profile. Click **Browse** to navigate your computer file system to find an image. Refer to <u>Working with Images</u> on page 7 for instructions to format an image for this purpose.

◦ ~~Locale~~ *Settings*. Your local time zone.

3. Click **Save**.

4. You may update your Name and Address information. Click the **Name and Address** tab.

5. Make the desired changes.

6. Click **Save**.

7. The *Home* page will display.

Creating Content

As a member of the PMI-Milwaukee Chapter, you can create job postings, post a resume and post meeting minutes.

Create a Job Posting

When creating a Job Posting, the following fields are required:

• Job Title
• Company
• Contact

To create a job posting, follow the instructions below.

1. Login to the PMI-Milwaukee Web Site.

2. Click **Create Content** on the user menu.

3. Click **Job Posting**. The *Create Job Posting* page will display.

4. Enter the *Job Title*, *Company*, and *Contact information*.

5. If desired, enter the *Expiration Date and Time*. Time must be entered in 24-hour format.

6. Tab to the next field or click in the *Job Description* field.

7. You may enter the full text of the posting in this field, or a brief description with instruction to see the file attachment associated with the posting. You may use the WSIWYG editor or use HTML.
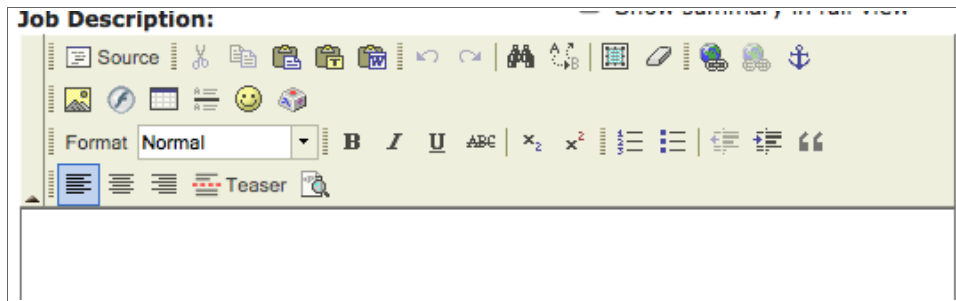
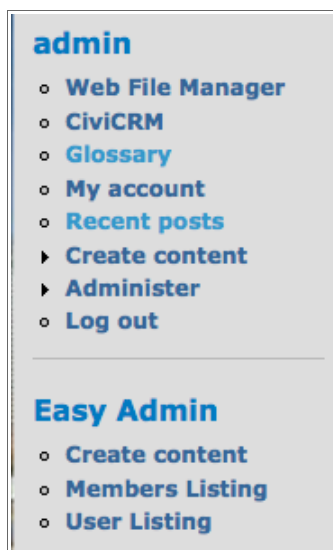Valid tags are shown in the Input Format area.
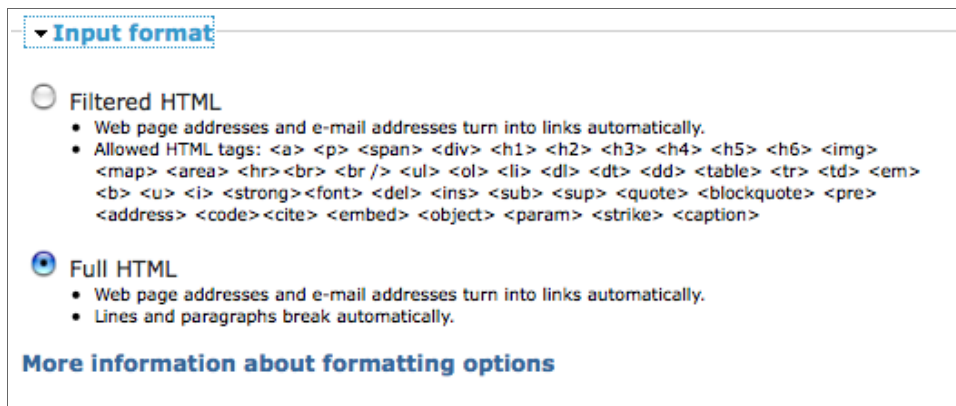
8.

Post a Resume

Post Meeting Minutes

For PMI Milwaukee Site Administrators

The Admin Menu

The Admin Menu is only visible once an authorized admin user has logged in to the PMI-Milwaukee Chapter Web site.

admin
- ○ Web File Manager
- ○ CiviCRM
- ○ Glossary
- ○ My account
- ○ Recent posts
- ▶ Create content
- ▶ Administer
- ○ Log out

Easy Admin
- ○ Create content
- ○ Members Listing
- ○ User Listing

The following options are currently available:

- Web File Manager
- **CiviCRM**. Access to the PMI-Milwaukee membership management application. Refer to on page 23
- ssary
- **My account**. Your user account information. Refer to My Account on page 13.
- **Recent Posts**. The most recent content items and files added to the site. To view any of the items, select the item's **Title**.
- **Create Content**. Create a job posting, resume posting, or meeting minutes. Refer to Adding, Editing, and Publishing Content on page 18.
- Administer.
- **Log out**. For Logout instructions, refer to Log Out of the PMI-Milwaukee Chapter Web Site on page Error: Reference source not found.

On the *Easy Admin* menu, the following options are available:

- Create Content.
- Members Listing
- User Listing

Adding, Editing, and Publishing Content

Adding images to content articles

Managing Comments

Adding items to menus

Adding Files with the File Browser

Linking files to content items

Event management

Block Management

Actions (like the send e-mail automatically function)

Webforms (for surveys, etc.)

CiviCRM

CiviCRM User Management

Creating Users

Users of the PMI-Milwaukee Chapter Web site can be added manually to the database. This is a basic feature of CiviCRM can only be accomplished through the Admin area.

1. Log in to the Administration area. See <u>For PMI Milwaukee Site Administrators</u> on page 16.

2.

3. Enter the listing information into the fields shown below. You may Tab between the fields.

Field Name	Description
Name	The name user.
Username	The username that will be used to access the site. This should not contain any spaces.
E-mail	The valid e-mail address of the user.
Password	The password to be used in combination with the Username. The password cannot contain spaces. A secure password should be used and contain a combination of letters, numbers and symbols. Ideally a randomly created password should be used. There are a number of <u>password generator Web sites</u> that can be used to create passwords.
Verify Password	Enter the password again.
Group	All users must be assigned to a group. Business owners that will be maintaining their listings should be assigned to **Registered** group.

4. Click the **Save** icon. It is located in the upper right area of the page.

1. Enter the listing information into the fields shown below. You may Tab between the fields.

| Field Name	Description

CiviCRM Event Management

Creating Ads for the PMI-Milwaukee Web Site

How to Change the Foreground Color in GIMP

If you want the excess background of the images you create to match the background of the PMI-Milwaukee Chapter Web site, follow the instructions below.

1. Open GIMP.

2. Click the **Foreground** item in the Toolbox.

3. The Change Foreground Color dialog box will open.
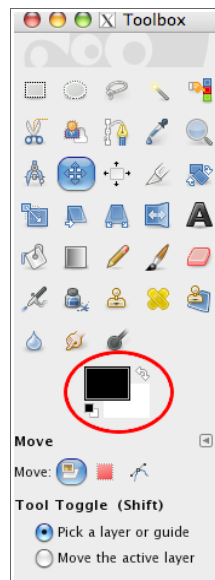
4. In the **HTML Notation** field, type .

5. Click **OK**.