UNIVERSITY OF CAMBRIDGE
Information Services

Falcon

**An Introduction for
Content and Site Managers
(Parts 1 & 2)**

Contents

Falcon: An Introduction for Content and Site Managers (Parts 1 and 2)

What is Falcon?

Falcon is a Content Management Service, which creates individual websites in a managed environment, ready templated in the University house style and with a range of functionality already available. Falcon is based on the open source content management system Plone (http://plone.org/).

The University templates used in Falcon are responsive, which is to say that they adapt to give a slightly different presentation for tablet and mobile devices.

What this course does

This course is to introduce you to what Falcon can do and how you can use that functionality to create a website. It is a practical-based course, during which you build up some content on a course website. For the purposes of the course you are all site managers, which for some will be a different role than you would have normally. Although don't need any knowledge of HTML to use Falcon, you may find it easier to troubleshoot pages if you do. There are introductory HTML courses run by UIS (see http://training.cam.ac.uk/ucs/course/ucs-html-beg) that will give you enough background to be comfortable.

On **day one**, the course covers the following:

- An overview of Falcon

- A look at the default site

- Learning to add simple content

- Configuring your site's look and feel

- Adding news, events and jobs

- Working with portlets and your home page

You can see that although you will be raring to get to your home page, we don't get to that until you've been through the basics of how your site works.

On **day two**:

- Recap of work so far

- Setting the site footer

- Adding more complex content to pages

- Adding users and groups, and restricting access to content

There is a further course for site managers that covers a wide range of extra functionality – see http://training.cam.ac.uk/course/ucs-falcon-sitemgr for dates and booking.

1. Introduction

What can Falcon do?

- Allow a certain amount of configuration of the site and ability to manage users and groups and their access to the site and for updating pages

- Work within the standard University ("Project Light") templates so that breadcrumbs are generated automatically, left-hand navigation is constructed, etc.

- Serve standard web pages with images, pdfs and Word documents - the web pages are edited through the web browser and the images, pdfs and other documents are uploaded individually through the web browser.

- Give access to in-built added functionality

- Solve website delivery problems for £100 per year.

IN-BUILT ADDED FUNCTIONALITY

There are various additions to help you manage the site and its content. You will need to be a site manager to do these, but knowing the features are available will give you a valuable insight into organising your site:

- You can add pre-configured items (feeds/static text/link lists/video or twitter feeds) in right panel of any page and on main area of home page of site - these are known as portlets

- There is in-built management of news, events and jobs - all of these produce rss feeds and may be added to the right panel of pages

- You can configure footer information for the whole site and at a folder-by-folder level

WHAT FALCON WON'T DO

- A site with something other than the University templates

- A site with more than one research directory

- Additional complex javascript

- Allow interaction with other server technologies

- Allow admins access for further customisation

Requesting a Falcon site

When you request a Falcon site, there is a short list of information we need.

- The crsids of the admins of the site

- The purpose of the site and the department under whose aegis it comes

- A domain name for the site (not required initially, but needed before the site can be made live)

- A role-based email address for contact purposes (again, not required initially, but needed before the site can be made live)

Send this information in an email to falcon-support@uis.cam.ac.uk Sites are usually set up overnight and will be ready for you to use the next day.

Making your Falcon site 'live'

During the development phase the site is accessed via a url of the form http://www-falcon.csx.cam.ac.uk/site/NAME (which blocked from being indexed by Google) - when the site is 'made live'

a domain name (such as http://www-name.eng.cam.ac.uk) is associated with this name. The domain name is supplied either:

- by the department within which the site is based (who manage their domain names themselves)

- by a request to Institution Strategy (institution-strategy@uis.cam.ac.uk), who agree cam.ac.uk and group.cam.ac.uk domain names and can supply appropriate other advice about names

Once the name has been agreed the UIS needs to apply for and apply a security certificate for the site (which can take 24-hours and more), and then the DNS needs to be updated to make the domain name live (which will happen overnight). If you have a date in mind, it is best to send your request to falcon-support@uis.cam.ac.uk a week or so ahead of time so that this preparatory work can be done.

We can only apply cam.ac.uk names to Falcon sites.

Removing a Falcon site

If you decide that Falcon isn't for you, just email falcon-support@uis.cam.ac.uk and ask for the site to be removed.

What do you want in your website?

Another thing Falcon won't do is design your site structure for you - you will still have to consider how to design the site to make the most of how Falcon works. Your website needs to work for the users you anticipate visiting it, and provide them with the information you anticipate they need, so:

- Decide on the broad objectives of your site

- List the user groups that will be using your site

- List the categories of information you wish to present

- Look at the list of features available in Falcon and decide which of them you want to use

- Think about how you are going to keep your site up to date. Who are you going to give 'edit' access, and to what parts of the site?

- Draw a up a tree diagram of what you want on the site, with the home page at the top, labeling the folders, sub-folders and pages, to get something like this:

You then use this map of your site as a framework for adding folders and pages to your site.

Recommended reading: Yale Web Style Guide (3rd edition) – 'Information Architecture'
http://www.webstyleguide.com/wsg3/3-information-architecture/

How do you want your site to look?

There are two elements to the look of the site:

- the structure and presentation of the information

- the appearance of the page, in terms of colour; how many images you want; what is in the head and foot areas; what search you want to use.

Falcon by default has a site-wide navigation bar to which all new items in the top level of the site are added, and the contents of folders are exposed as pop-down navigation (except for 'News and 'Events'). You need to use your navigation bar wisely:

- add to it the sections of the site that you want people to be able to access easily from any page

- don't use long titles for those sections

- don't add too many individual items to a folder forming one of these sections, otherwise the pop-down is unwieldy – structure the information into sub-folders
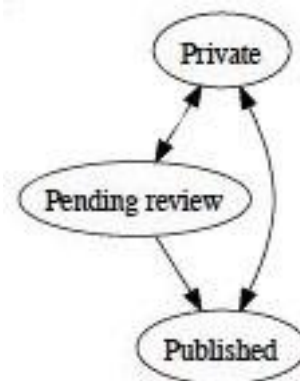
The mechanics of the publishing process

Falcon manages content in a staged process (known as the workflow). When a user of any kind creates content and saves it, the content is 'private' and cannot be seen by browsers of the site. The content does not become visible to all until it is published. Once content is published by an admin user, it can be withdrawn to be 'private' again by being 'retracted'. This whole process can be accomplished manually or can be scheduled. As a visual aid, 'private' is flagged in bright red type and 'published' content is flagged in blue type. For site members who can't publish directly there is an interim step ('pending review') for approval by an administrator, who can also 'send back' content if it isn't right for publication. The most common reason for content not being available to users (or causing a request for Raven authentication) is because it has not been published.

If an entire site is set up to be 'Cambridge only' accessible or accessible by another group, all content is kept private. More explanation of this is available on demand.

When you are working on a site, you are Raven authenticated and your view will be the authenticated user's view, so you will see the editing bar and your private content. If you are one of the site admins (known as managers), you will see this throughout the site. If you only have editing rights for certain folders, after you have authenticated you will see the editing bar only on those folders. To have a proper non-authenticated user's view, you will need to run a second browser that is not Raven authenticated (make sure you use http://... rather than https://... otherwise you will be prompted to Raven authenticate).

2. A look at the default site

The default site

When a new Falcon site is created it looks like this:
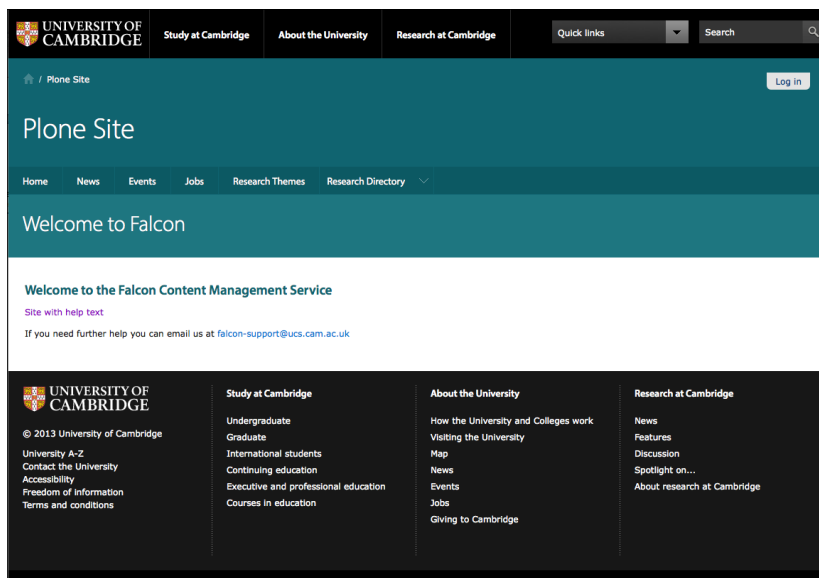
When logged in it looks like this:

There are default folders set up for you, some of which you can see across the navigation bar, or if you click on the contents tab you can see the full contents of the site:

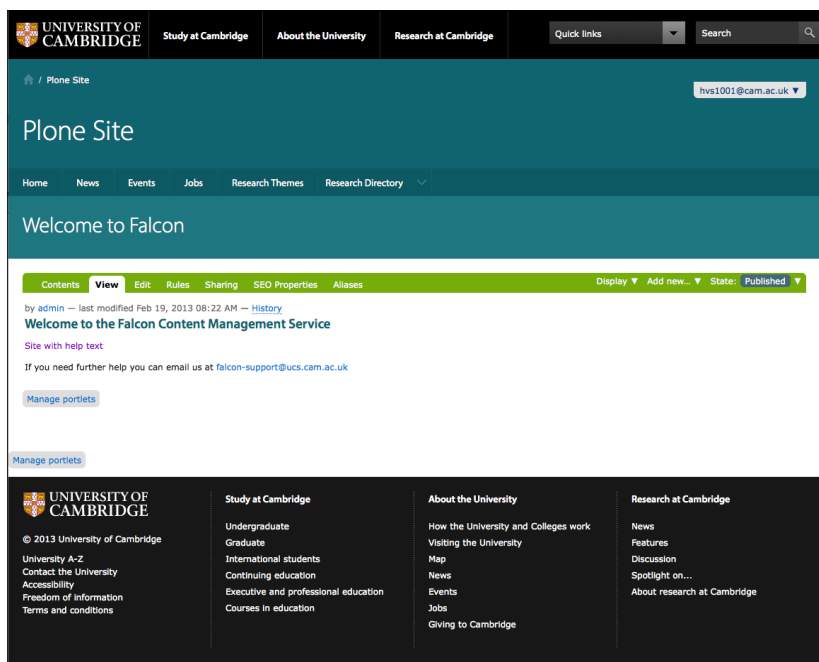|		Title	Size	Modified	State
	☐	📄 Welcome to Plone	4.8 KB	Feb 19, 2013 08:22 AM	Published
	☐	📁 News	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	📁 Events	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	📁 Users	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	📄 Keywords	0 KB	Feb 19, 2013 08:22 AM	Private
	☐	relations_library	1 KB	Feb 19, 2013 08:22 AM	
	☐	Jobs	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Research Themes	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Departments	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Collaborators	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Research Directory	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Images	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	Help	1 KB	Feb 19, 2013 08:22 AM	Published
	☐	📄 Welcome to Falcon ■	1 KB	Feb 19, 2013 08:22 AM	Published

In this contents view you can see the contents of a typical default set up, with a range of different icons, which represent different types of content:

- a folder 📁 Users

- a page 📄 Welcome to Falcon

- a collection 🗐 Research Themes

- a script 〈〉 relations_library

Don't delete anything from your site – you:

- probably don't know what it is

- might not want it now but you could need it in future

- can just make it not visible to users by making it private and/or excluding it from navigation.

Comparing the navigation bar and the contents view, you can see there are items in the contents view that are not on the navigation bar – they have been excluded from the navigation bar (for which, see a bit later).

HOW TO PUBLISH CONTENT

When you create some content, there will be a **'state'** shown on the editing bar, which will show that the item is private. This is shown in red so it is more noticeable:

This is what you'll see:

When you click on 'state: private', you'll see a pop-down:
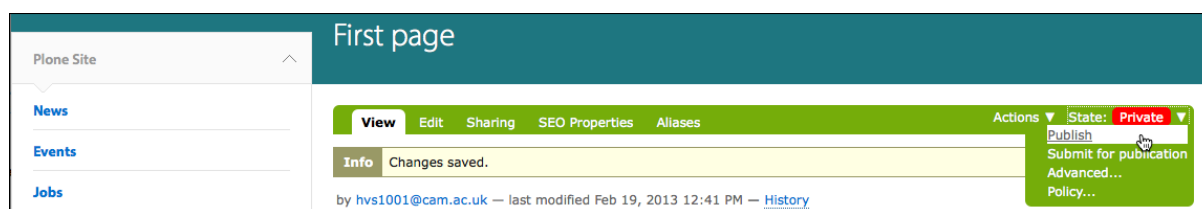
When you select 'publish' from this, the state of the page will change:
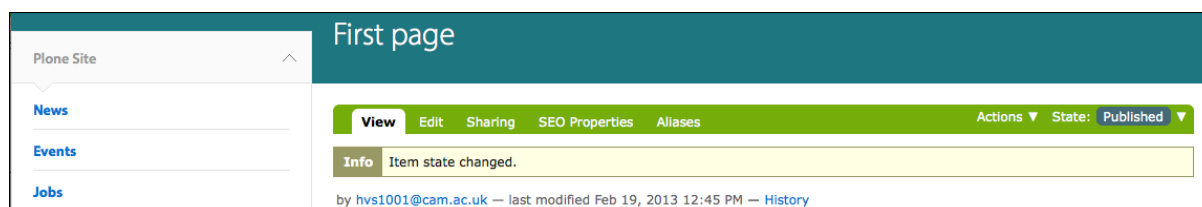
If you want to unpublish or retract the page, go to the pop-down again and select retract:
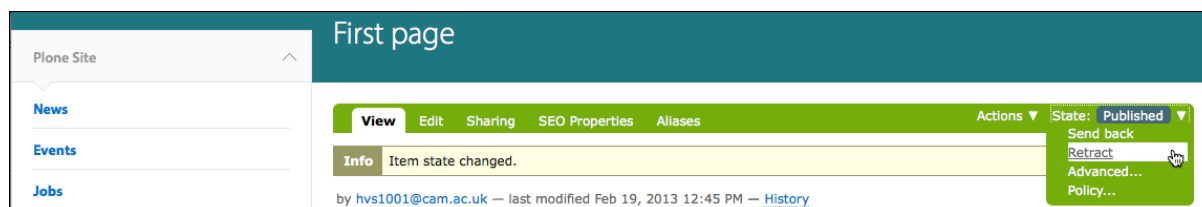
If you go to the 'content' tab on the editing bar of the folder, you will see that an unpublished page or folder will be listed in red:
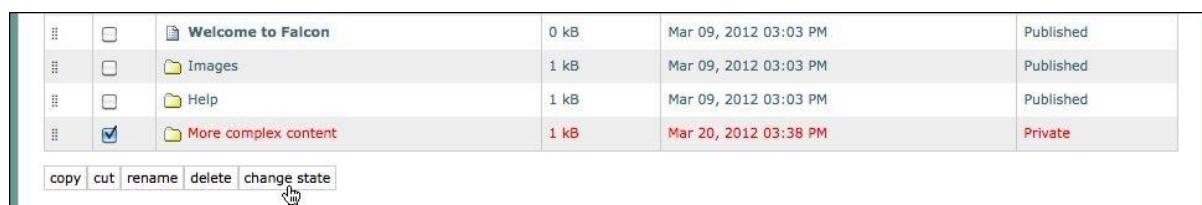
If you check the box by the side of the filename and click on 'change state', you will be able to publish the page (you can select several items at once – if you select a folder a check box on the second screen makes it possible to select all items in the folder, as here):

RETRACTING PUBLISHED CONTENT:

If you want to keep a standard item (say, the Research Directory) in the navigation bar for your own ease of use, but you don't want it to be seen by others while you are developing it, you can retract it from publication so that it is private to you. You can do this for the folder and its contents via the contents screen: select the folder and then click **'change state'** at the bottom of the content table (as above).

The screen you now see will give you the opportunity to

•   include the contents of the folder (by check box)

•   Set a time and date for publishing

•   Retract the item. 'Send back' is used for refusing an item submitted by someone with the contributor role for publication.

HOW TO EXCLUDE ITEMS FROM THE NAVIGATION BAR

By default, when you add a folder or file at the top-level of your site it will included in the navigation bar and will be seen by all users once it is published. Clearly not all items should be in the navigation bar – you can exclude them in one of two ways;

- by **changing the settings** of the folder or file to remove them from navigation

- by not publishing the content (or retracting it from being published – see above).

The two ways both have their uses –:

- the **first** is right if you don't intend the item ever to be in the navigation bar

- the **second** is right if you do intend the item to be in the navigation bar eventually, but while working on the new content you want to keep it easily available to you (you'll need to remember the users can't see it)

Changing settings: If you want to exclude, say, the Research Directory from the navigation bar, do the following:

- Click on the folder or the navigation bar link to open the folder.

- Click on the '**edit**' tab in the editing bar

- Click on the '**Settings**' tab on the editing screen

- Check the box next to '**Exclude from navigation**' and **save**. You will see the item disappear from the navigation bar.

Reverse the process to get items back into the navigation bar.

PRACTICAL 1

- Click on 'Research Directory Overview'

- Click on the '**Edit**' tab and then click on '**Settings**'

- Check the box beside '**Exclude from navigation**' and save.

The Research Directory will disappear from your navigation bar.

- On your home page, click on the '**Contents**' tab

- Click on the '**Research Directory**' folder

- Click on the '**Edit**' tab and then click on '**Settings**'

- Uncheck the box beside '**Exclude from navigation**' and save.

3. Learning to add simple content

The framework for adding simple content in Falcon is adding folders that contain pages and (possibly) files and/or sub-folders. The pages can contain standard html content, including images and embedded video or iframes. If you have no experience of html, it would be useful to learn some, either by doing a course or some tutorials such as those at http://htmldog.com/ For those with some experience of managing content manually, there is a slight difference in the concept of a folder in managed content, since unlike in a standard filesystem it has an entity and appearance, even though it contains nothing.

You add new folders, files and pages via '**Add new**' on the editing bar:

Adding a folder

- If you have a new site, go to the home page to add a folder at the top level of the site.

- Click on the '**Add new**' tab on the editing bar and select '**folder**' from the pop-down list

- Name the folder. When you add the **title** and save the folder the shortname will be created automatically by lowercasing and hyphenating the title. The **short name** is what will appear in the url. If you want to alter the automatic shortname or create your own, it should be lower case and should

not contain any spaces. The title should not be too long, especially if you wish this folder to feature in the navigation bar.

- When you save the new folder, you are then in the folder afterwards, and if you are ready, you should publish it (select the right-hand '**state**' tab and choose '**publish**' from the pop-down). If you wish to assemble the content in full or have someone else check it before publishing it, you can publish the folder and contents later.

If you add a page or a folder at the top level of the site, you will see that the folder has by default been added to the navigation bar. To remove the folder from the navigation bar:

- Click on the '**edit**' tab in the editing bar

- Click on the '**Settings**' tab on the editing screen

- Check the box next to 'Exclude from Navigation'

Adding pages

- Click on the '**Add new**' tab on the editing bar and select '**page**' from the pop-down list:

- Name the page. When you add the **title** and save the page the shortname will be created automatically by lowercasing and hyphenating the title. The **short name** is what will appear in the url. If you want to alter the automatic shortname or create your own, it should be lower case and should not contain any spaces. The title will be both the html title (which appears at the top bar of your browser window and if the page gets bookmarked) and the h1 heading of the page. If you want to add the content now you can, otherwise you can come back to do that once you have a set of pages ready to populate. Save the page.

- You then see the created item, and if you are ready, you could publish it (select the right-hand '**state**' tab and choose '**publish**' from the pop-down). If you wish to assemble the content in full or have someone else check it before publishing it, you can publish a folder and contents later.

When you add a page to a folder, you will see that the page has by default been added to the left-hand navigation. To remove the page from the left-hand navigation:

- Click on the '**edit**' tab in the editing bar

- Click on the '**Settings**' tab on the editing screen

- Check the box next to 'Exclude from Navigation'

Adding files

Often people want to have pdf files in a folder usually to link to from pages. To add pdf or other files, choose '**Add new…**' **> file** from the editing bar. If you don't add a title or a short name, both will take the original filename of the uploaded item – you can edit this after upload. If you have many files to add, you can do a bulk upload (see later).

When you add a pdf or any other sort of file to a folder, you will see that it has by default been added to the left-hand navigation. You can exclude each pdf from navigation, as described above but if you want them all to be excluded it would be sensible to put them into a sub-folder and exclude that sub-folder from the left navigation. This would also apply to images.

A folder, file or page can be removed from the navigation if required, in a similar way to removing items from the navigation bar – to do so:

- Click on it, so you are in or on the item, then select **'edit'** from the editing bar:

- Then select **'Settings'** from the bar at the top of the editing screen:

- Then, from the choices on the screen, select **'Exclude from navigation'** and click **'save'**.

- The entry with the page title will disappear from the left-hand navigation.

Adding sub-folders

If you want a second level of navigation in a folder of content, you can add a folder, and then add pages to that folder. The pages will be shown as second level navigation items once the folder is selected (see http://falcon-help.csx.cam.ac.uk/site-setup/adding-users as an example). Further levels of navigation are created when you add another sub folder.

PRACTICAL 2:

- At the top level of your site, create a folder with the title **Information about widgets**, with the short name **widget-info**.

- Create three pages in the folder, with the titles: **Widgets introduction**, **Widgets for students** and **Widgets for staff** – make suitable short names – save them without adding any further content.

Adding content

Within a page there is a built-in wysiwyg editor that allows you to type your content directly and style it, or switch into looking at the html. The editor is called TinyMCE, and it is used on a widespread basis in through-the-web editing. Like any embedded editor, it can take your styling commands rather literally, producing a nest of html. The available buttons on the editor are labeled so are self explanatory. If the appearance of your page is odd and you have experience of html, it is worth looking at the code to see if extra code is being added that you are not aware of. (There are more details about using the editor at http://falcon-help.csx.cam.ac.uk/content/editor)

- If you are typing directly into the editor, it'll probably cause fewer coding glitches to type the text in first and then add the styling (or functionality) afterwards by selecting the text and then selecting either the style from the pop-down menu or the editor buttons.

- If you have existing html, turn to html mode and paste the content fragment of the html directly into the page and update then save it. You will have to transfer any images to the Falcon site and modify the links, and also re-create any internal links, and will have to check that tables are styled properly (using the 'standard' style) but otherwise the page should look OK. The system will quietly remove forbidden code, like javascript or inline styling (more later about this).

- Copy and paste from a document or browser window into the edit screen. This process might bring some formatting along with it, which you will need to clean up. Use **'Paste as text'** or **'Paste as Word'** buttons to remove all or some of the formatting when pasting into Falcon.

PRACTICAL 3:

- Create a new browser tab for http://falcon-help.csx.cam.ac.uk/course-materials/, go to **'Information about widgets'** and you will see copies of the three pages you started. Go to **'Widgets introduction'**, and copy the text from the web page. Go to your equivalent page and paste in the text. Look at the HTML view of the page. You may see some extra code that has been added during the copy-and-paste process, which you can remove if you like.

This formatting has been collected in the copy-and-paste process but doesn't affect the look of the page. You could delete it if you want. Save the page. Do the same thing for the '**Widgets for staff**' page or type in some content, so you now have two pages with content in them.

• In your pages, open '**Widgets for students**'. Open another tab on your browser and go to the page http://www.nature.com/news/2011/110308/full/news.2011.140.html – select and copy some of the text and paste it into your page. Look at the html view and see the result.

Adding links

There are two kinds of link – internal links, that is those to items within Falcon, and external links, going outside Falcon.

• To add either, you first create and select the link text and click on [link icon]. You will see a screen similar to this, which allows you to add an internal link:
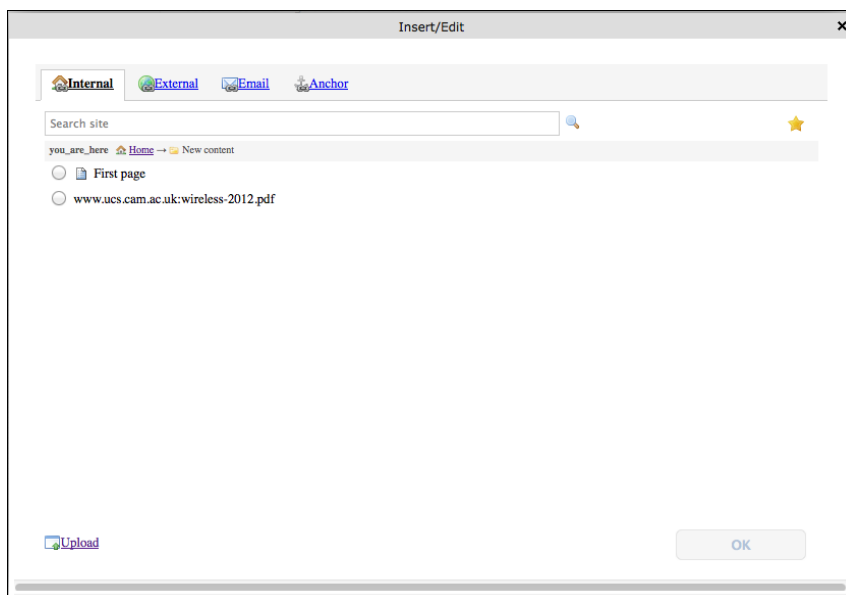
To insert an internal link you navigate to the item you want to link to, click the button alongside it and click '**OK**'. To add an external link, click on the '**External**' tab and you will see the following:
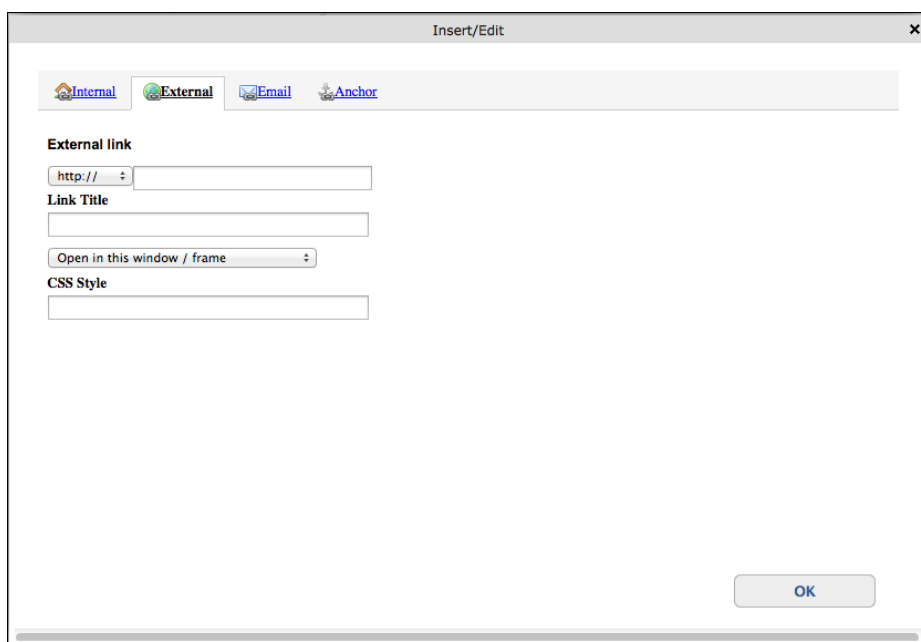
Here you can add the URL you want. By default, links to an address in cam.ac.uk open in the existing window or tab and external links outside cam.ac.uk open in a new window or tab. You will see below the link a pop-down that allows you to style the link to open a cam.ac.uk link in other than in the current window:
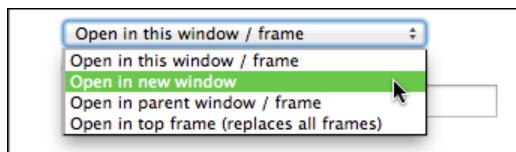
You shouldn't open links in new windows without warning the user on the original page.

Adding anchors

When you want to create links to particular sections of a page, there are two steps:

•   First insert the anchors into the page you want to link to

•   Second go the page you want to link from and create the link

To add the anchors:

•   In the target page, in edit, click to the left of any heading you want to link to and click on the button shaped like an anchor (right end of middle row in editor).

•   Type in an anchor name and click 'Insert' - make the anchor name a really obvious whole word.

•   Proceed through all the anchors you want to add.

•   Remember to save the page.

To add links to the anchors:

•   If you want to make a link to an anchor **in the same page**, highlight your link text, click on to insert/edit link. Go to the right tab '**Anchor**' and you will see any anchors in the current page - select the one you need and click 'OK'.

•   If you want to make a link to an anchor **in a different page**, highlight your link text, click to insert/edit a link and create a link to the page, use the drop down list to select the anchor.

•   Remember to save the page.
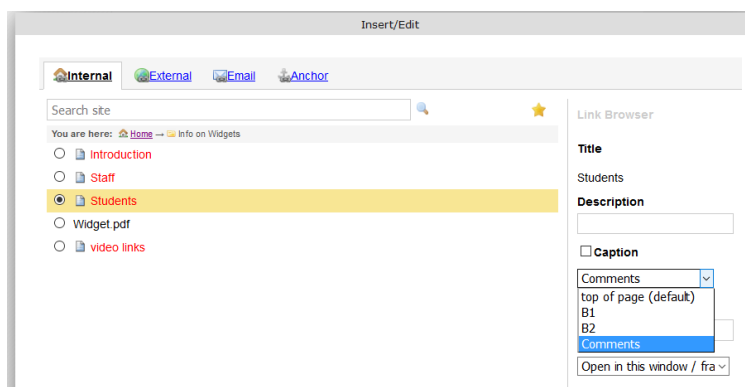
Practical 4:

•   Edit one of your new pages to add an internal link to one of the other pages. First type in the link text, then select this text and go to the '**insert/edit link**' button. After that, at the bottom of one of your pages add an external link to the site http://www.guinness-storehouse.com/

Adding images

By default there is a folder for images at the top level of your Falcon site. It is usually good practice to keep your images together in one place so that you can easily find them and re-use them if necessary. There is no requirement to do this, and if it is easier for your circumstances to keep some images in folders throughout the site this is fine – **do not** name all the folders 'images', as Falcon can get confused. Falcon will allow you to upload a wide variety of image types but only .gif, .jpg and .png will be shown on web pages. To show, for instance, a .tiff file on a web page, you will have to convert it **before** uploading. Make sure you optimize your files to a sensible size before you upload them, both in terms of dimensions and dpi – images for viewing in web pages ought to be 72dpi. Standard image sizes for the new templates are:

- For the **home page**: carousel/large image - 883 x 431px; teaser image - 250px square, so currently used square images may be usable

- For carousel/smaller image at top of **second level pages**: 590 x 288px

- For images **within pages**: they should be 250px square, so currently used square images may be usable

- For teaser portlet: 349 x 125px
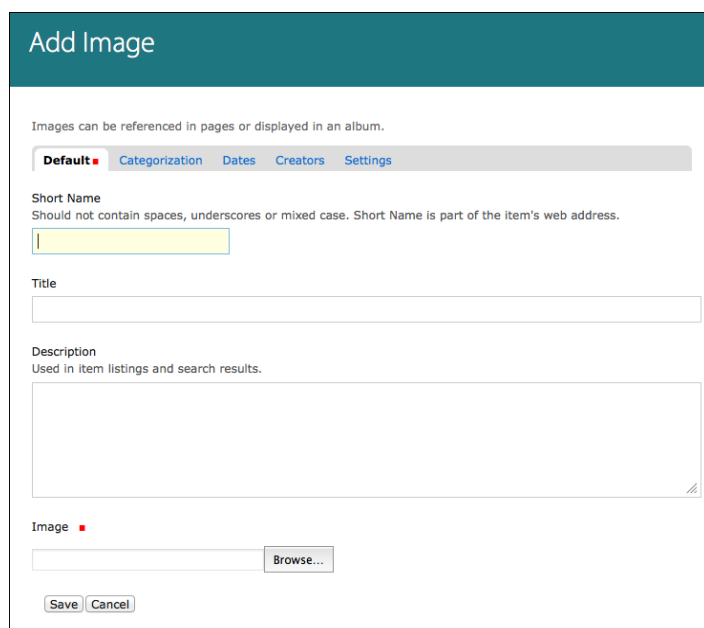
A handy free online image editor is at https://pixlr.com/express

It is wise to name your image so you know what you intended it for, for instance either size of carousel images and the teaser portlet images are particular sizes and couldn't be used as a standard image in the content area of a page.

You can upload images as a group or you can upload them individually when you wish to add them to a page - the method is slightly different, as shown below. Adding headshot images to profiles in the Research Directory follows a different method and the images are kept in the directory, as detailed later.

Uploading an image to the image directory

- At the '**home**' level of your site, go to the '**contents**' tab on the editing bar and click on '**Images**'.

- Go to the '**add new...**' tab on the editing bar and select '**image**':

Add Image

Images can be referenced in pages or displayed in an album.

Default ■ Categorization Dates Creators Settings

Short Name
Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

Title

Description
Used in item listings and search results.

Image ■

Browse...

Save Cancel

The only **requirement** is to browse to the image you wish to upload from your local machine and select it. If you don't add a new title, the name of the existing file will be adopted but any hyphens, underlines or spaces will be removed and any upper case letters will be lowercased.

- If you add a **short name** it will be used in the url for that item;

- if you add a **title**, it will be used when the image is listed in the images folder and will be also used as the alt text for the image;

- if you add a description, it will be used when the image is listed in the images folder and for the caption if that is displayed when the image is inserted on a page.

You can edit these fields after the upload if you wish.

Adding an image to the content area of a page

While you are adding content to a page (or afterwards) you can upload and add images within the content in a single process.

TO ADD AN IMAGE TO A PAGE:

If you want to float an image right or left, you need to insert it at the start of a paragraph immediately before the first letter. If you want an image to be on a line by itself, create that new line and insert the

image at the start of it. Position your cursor and select the '**insert/edit image**' icon in the text editing bar.

You will see the **Insert/edit image** screen:
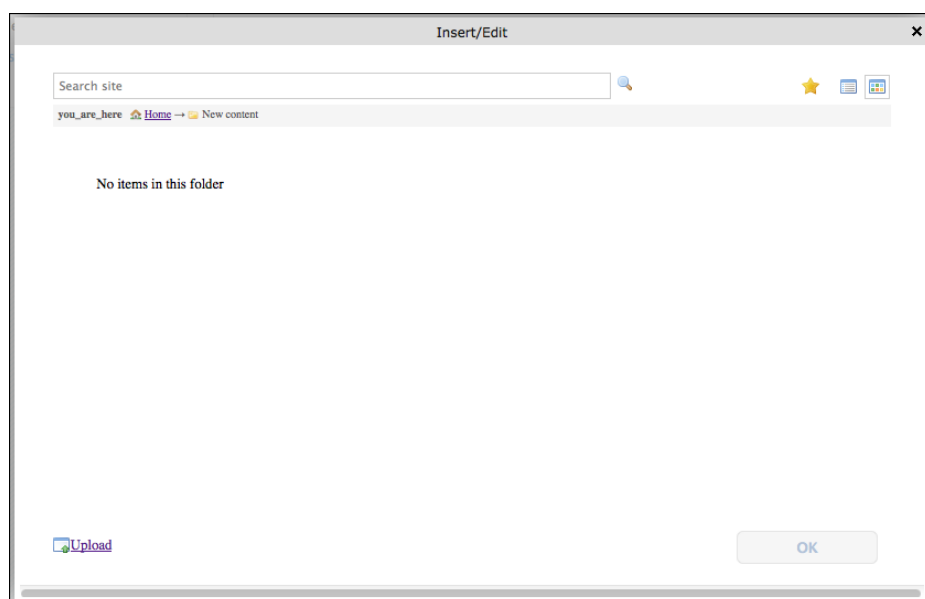
This gives you the opportunity to select or upload an image in the folder that you are currently in.

- If you wish to use an image already in the /Images folder or upload an image to the folder /Images/ you will need to use the breadcrumb trail to navigate to '**home**' and then '**Images**'. Either select the image you want to use or select '**upload file'.**

- If you wish to upload an image in the folder you are currently in, you should just select **'upload'** at the bottom left then Upload file functionality will appear on the right of the panel.
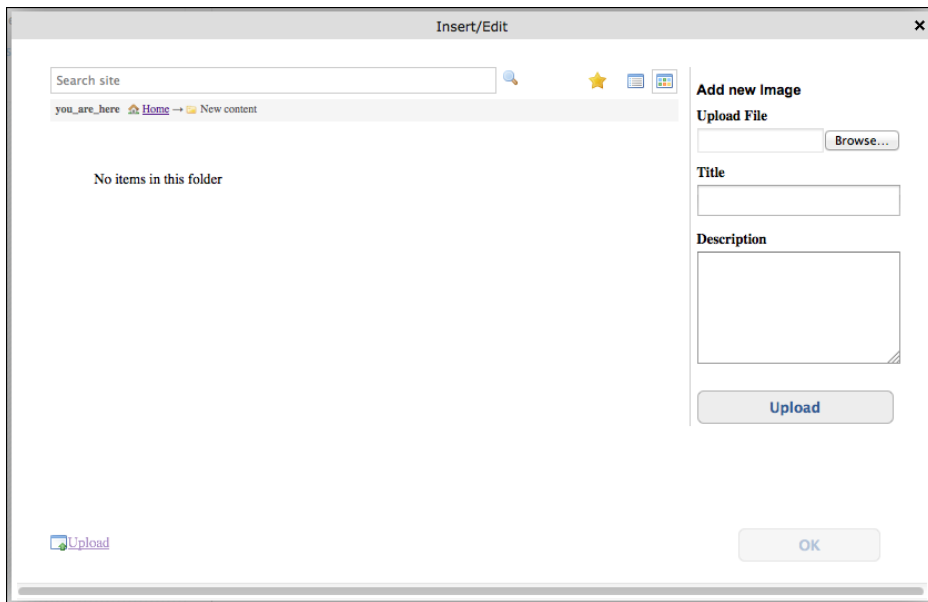
You will then need to browse to the image on your local machine and select the one you wish to use, add a title for it and a description if you wish (see above for what these are used for). Click **Upload**. The images list in the middle column will now contain the image you just uploaded, and it will be selected.
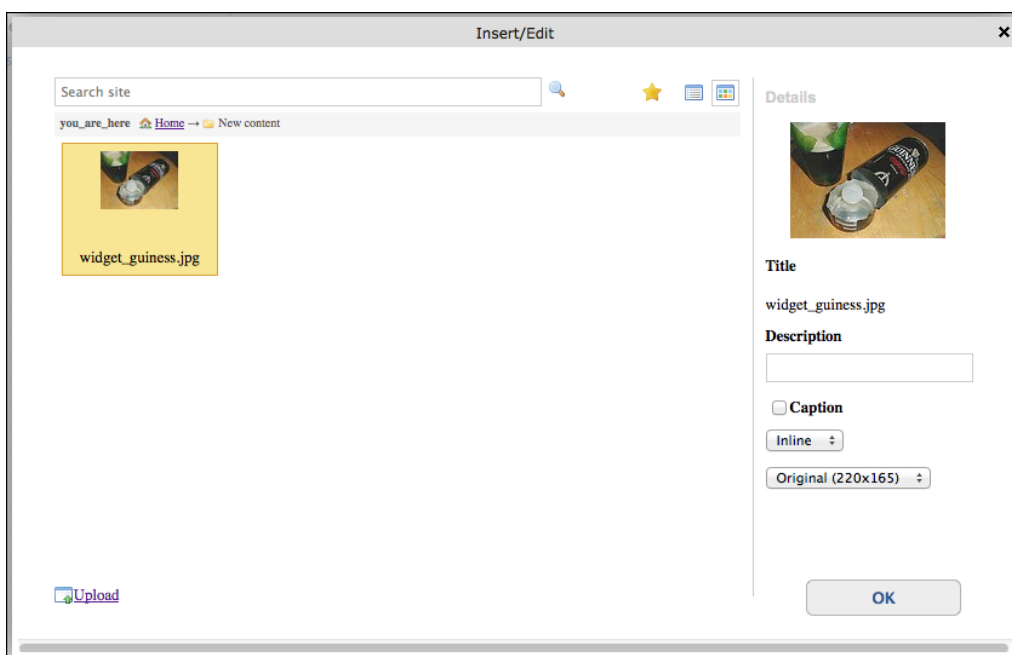
On the right you will see the image and the options for adding the image into your page. You can:

- add a description (if you hadn't already), which will be used as a caption if you choose that option by checking the box next to 'Caption'.

- choose how you want to position the image from the popdown below 'Caption' – you can choose 'Inline' (for images on a line by themselves), or 'Right' or 'Left' for those floated next to text.

- choose a size selection from the popdown if you don't want to use the image at the size you originally used (your image will be scaled so the largest dimension fits the size you choose). The 200px square option is suitable for images added to text.

Finally click **'OK'**. Your page (still in editing mode) will now show the image you have added. If you have added a caption, you won't be able to see it until after you have saved the page.

If the image is not how you want it, you can select the image and re-select '**Insert/edit image'**, change the settings you chose, then click '**OK'**. If the image is not where you want it, it may be easiest to remove it and start again or go to the HTML view in the text editing bar and move the code for the image.

Uploaded images are automatically **published**. If you create a new folder for the images you will **have to publish the folder** otherwise the images won't be visible to users who are not logged in – you will also want to modify the settings so that it doesn't get featured in the left hand navigation..

PRACTICAL 5:

5a) Open one of your pages and select '**edit'** tab. Select a place at the start of the text and insert the image you will find in your /Images/ folder (following the instructions above), positioning the image on the right.

5b) Edit the image named: 3_beer_wine_5600x4331_px to fit the carousel 883 x 431 pixels
Go to http://pixlr.com/express/ open the image, **Adjust**, **Resize**, change the **Width** to 883 pixels and **Apply** Now Crop the Height to 431 pixels and Save

When you need to add more than one image, you will find it easier if you have a bulk upload tool available. A '**portlet**' is a pluggable application that delivers information such as news or feed information and there is a 'quick upload' portlet available that you can add to pages where it is appropriate.

In the images folder select the 'View' tab:

• Click on 'Manage portlets' link

• Go to 'Add portlet…' on the right side of the screen and select Quick Upload Portlet. You don't need to add or change anything on the screen that comes up, but you do need to save.
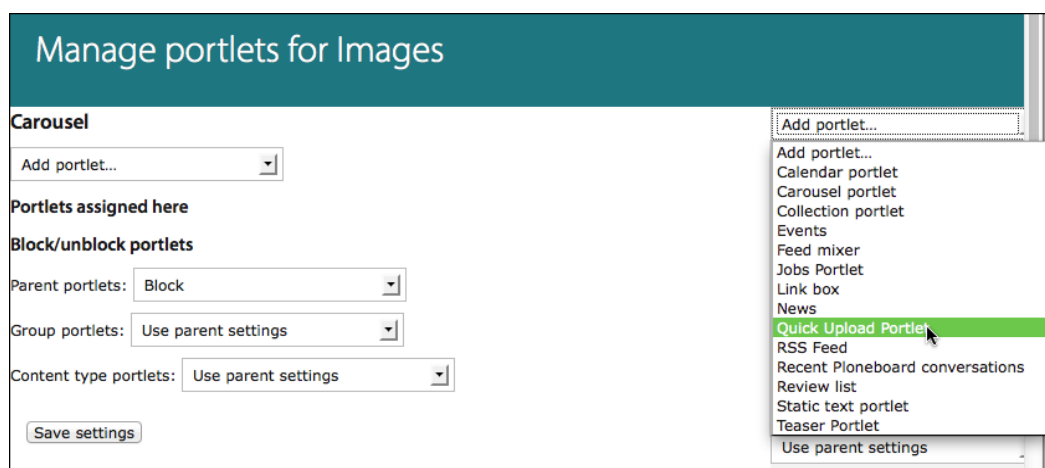
The upload portlet will now appear on the right side in your images folder, like this:
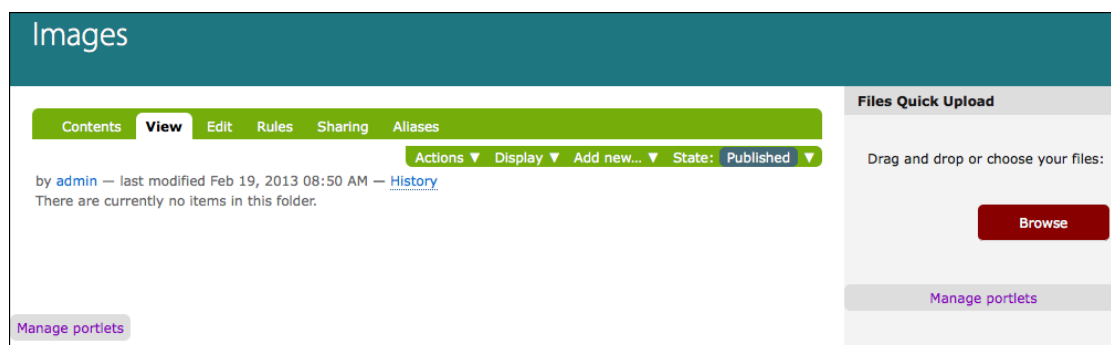
You can use it to select several files (images, pdfs, Excel spreadsheets, etc.) for upload in a batch.

PRACTICAL 6

• Navigate to your Images folder. Using the '**view**' tab on the editing bar, click on the link '**Manage portlets**' in the content area. Go to the '**Add portlet**' drop down on the top right and select '**Quick Upload Portlet**' – accept the default settings by saving. Click back on 'Images' in the breadcrumb trail. You will now see the portlet on the right side of the images folder that allows you to upload multiple files or images.

• Upload some images or files into the Images folder from your USB stick or the =course files folder, using the Quick Upload tool. Now go back to one of the widget pages and insert one of the images you just uploaded.

Sorting out how your folder looks

Having added some pages to your folder, we now have to sort out how it looks. When you first create a folder and pages the folder is being displayed in 'folder view', which just shows the contents. It is preferable that some introductory text is shown instead, and to do this you will need to change the display.

In a standard Apache web server, when there is a request for a folder the default page for display is usually a page called index.html. In Falcon you get to choose which page is displayed as the default page when a folder is requested, which you will then see instead of seeing the pages listed in the content area like this:
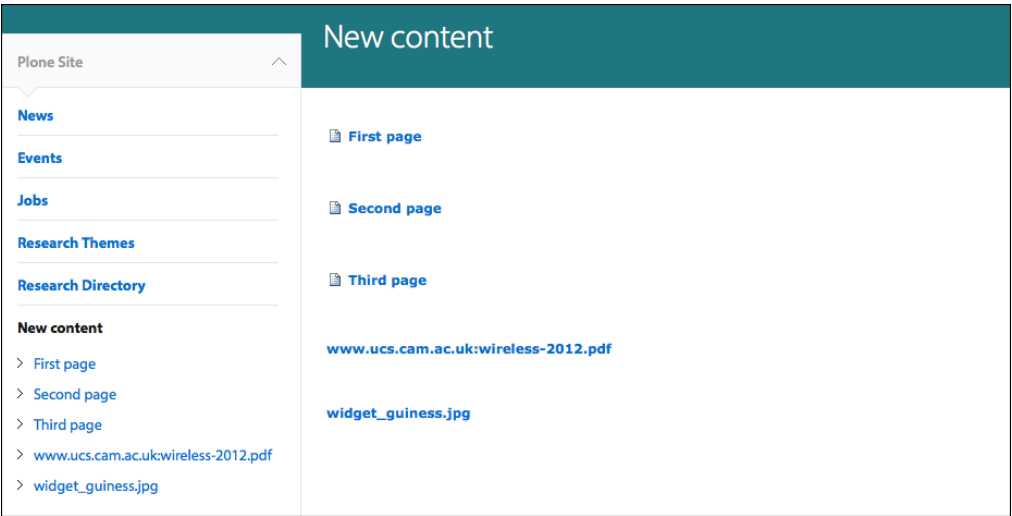
The page you elect to become the default page now becomes synonymous with the folder name in the left-hand navigation. It also appears in the navigation popdown as the overview for the folder.

TO MAKE A DEFAULT PAGE

•   First create your introductory page

•   At the top level of your folder, in the edit bar go to '**display**' and select '**select a content item as default view…**' then select the page you have created for the introduction.

•   If you go to the contents view of the folder, the default page will now be shown in bold.

•   Now when you go to a folder and select 'edit', at the top of the editing screen you will see the following:
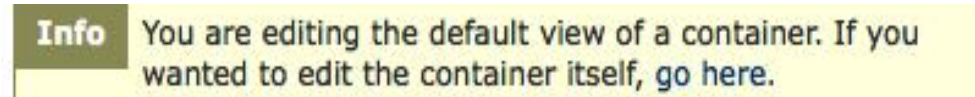
This means that if you want to change the folder name (to do that you are editing the container) you will need to follow the 'go here' link.

Reordering the left-hand navigation

When you add pages or files to a folder, they will be added to the left hand navigation in the order that you add them. When you want to change the order, navigate to the top level of the folder and go to the 'Contents' tab on the editing bar - you will then see a table listing the content of the folder, and down the left side of the table there is an icon made up of dots which you click and drag then release to move items up and down. When you click and drag the line turns yellow:
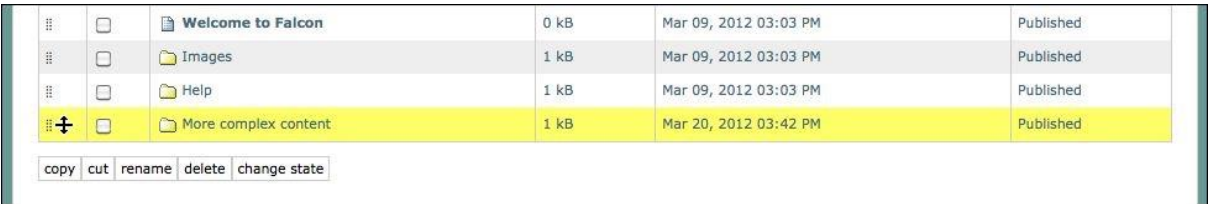
You will not see the changed order in the left hand navigation until you go back in 'view' in the editing bar.

- Go to your widgets folder, create a new introductory page and use it as the default page for the folder.

- Go to the **contents** tab and move your left-hand navigation items up and down the list. You will need to go to the **view** tab to see the change.

Moving content

If you want to move existing content – folders, files or pages –

- first go to the 'Contents' tab of the editing bar of the containing folder
- select the item or items you want to move by checking the box to the left of it/them
- click the 'cut' button at the bottom of the screen

- move to where you want to relocate the item and select 'paste'

Alternatively, for individual pages you can use the 'Actions' tab in the editing bar.

First you need to move a pdf file into your folder.

- Go to the home page of your site and to the **contents** tab. Click the check box by the side of the file 'Widget (beer) - Wikipedia.pdf'. After that, select the file, click on **cut**, move into the **contents** tab of your widgets folder and click on **paste**. Look in the '**view**' tab. The file will not appear in the left navigation.

- Go to the **content** tab, click on the pdf file, and click the '**rename**' tab. Give the file a suitable short name and title..

- Go to one of your widget pages and click the '**edit**' tab. At the bottom of the page insert a link to your pdf file (type some link text, select it, then click on 'insert/edit link' [🔗] and locate pdf file) – you can copy the title of the pdf and use it to replace the link text.

4. Configuring your site's look and feel

When your site is initially set up you are asked for some information about site name, administrators and a contact email for the site, which is recorded in the registration database. This will be setup within the site configuration and will be used behind the scenes. Other aspects of the site configuration can be changed.

- Go the **'Site setup'** (in the popdown below the site login tab):
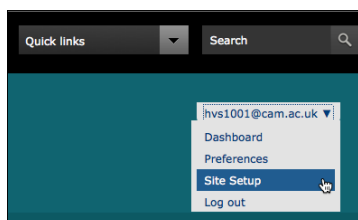
- Go to **Plone configuration > Site,** which shows you a few possible site-wide settings

  Leave the options as they are for now – they may be enabled if you wish and when you have sufficient skills to know how to use them (adding Google Analytics code is particularly useful – see https://falcon-help.csx.cam.ac.uk/site-setup/google-analytics).

- If you have made any changes, save them

There are options that you can set which alter how your site looks and works. To access these options:

- Go the **'Site setup'** (in the popdown below the site login tab, shown above)

- Go to **'Add-on Configuration' > Site Customisation,** which shows you some possible site-wide options.
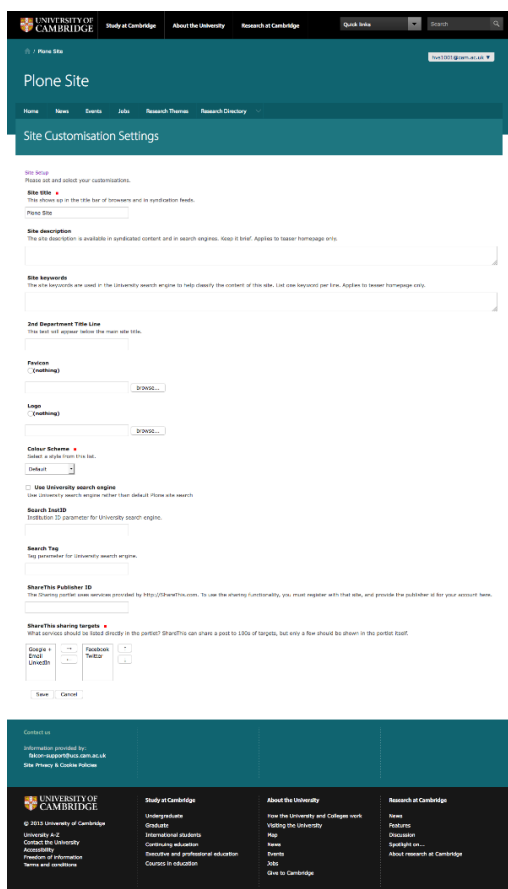
Here you can

- Add the Site title

- The **Site description** and **Site keywords** fields can be filled in to add metadata to the teaser home page (which isn't really a page so can't use the SEO optimization plug in that can add metadata to other pages). The description should be a keyword-rich synopsis of the purpose of the site: the keywords (or phrases) should be words or phrases you think people might use to search for your site, but don't occur on the home page.

- **Add an optional second line** for your department or site title if you need one

- **Add a favicon and/or a logo**, if you want to. The favicon appears in the top bar of a browser, and in bookmarks of newer browsers and must be either 16 x 16 or 32 x 32 pixels. The logo will appear in the header and to the left of the site title and can be up to 454 x 58 pixels, or will be scaled to fit these proportions. For both you must upload the image first and then browse to it in the site customization screen. See http://theksmith.com/technology/howto-website-icons-browsersdevices-favicon-apple-touch-icon-etc/ for help in producing and using favicons.

- **Select a colour scheme** from the list that are available

- **Use University search engine** allows you to select options for how your site search works.

  - If the box is not checked the default Plone site search is used but your site will still be searched by the University site-wide search (although you ought to tell us about your server to ensure this happen straight away).

  - Add your Institution ID and a search filter if you want to use one (a search filter covers a number of web servers but is expressed as a single expression - if you want one see http://www.ucs.cam.ac.uk/web-search/searchforms).

- **ShareThis Publisher ID** should be added to the next field if you want to use it for sharing content via the Sharing portlet, and the last option lets you select which sharing targets you want to appear in the portlet.

PRACTICAL **8:**

- Configure the appearance of your site to your choice.

5. Adding news, events and jobs

News, events and jobs are similar special forms of content for which the information you add about each item is pre-ordained, and then all items of the same item type and collected together in a list. The collection into a list is related to the item type, and you can set this up yourself (of which more later). Within each of the default folders, if you look under the contents tab you will find a file. This is the collection file that causes any new, events, or jobs item to be collected and formed into a date-order list. Do not delete this file or the date order of your items will be lost.

Adding items for any of these special types of content works in a similar way. Once you are in the appropriate folder, going to the '**edit**' tab and selecting **add new** will give you a pop-down selection that only consists of a new item for that information type - news item, event or job. There is a different amount of detail that you can add in each case - if you don't add information in fields then the empty fields will not appear on the published page. For news stories you can add an accompanying image that sits both in the listing and in the news story, scaled to different sizes. The image allocation is square, so to make your stories look their best stick to a square image.

When you have saved an item, it won't be visible until you **publish** it. To do this, select the right-hand '**state**' tab and choose '**publish**' from the pop-down. If you wish to assemble the content in full before publishing it, you can publish the folder and contents later.

As with the publishing process in general within Falcon, you can choose to publish at a particular time and date and retract the item at a given date and time.

It may sound obvious, but it is important to distinguish between 'news' and 'events' items. Events are associated with a time and a date (and also a place) and gain a direct link to a calendar, whereas news events do not have these connections.

PRACTICAL 9:

• Start by looking at your home page. If you are working with a partner, one of you add news and the other events.

• From '**Home**' go to the '**News**' tab. In the editing bar go the '**add new…**' > **news item** and fill in information to create a news item, save and publish it, then step back up to the news folder and create a second one.

• From '**Home**' go to the '**Events**' tab. In the editing bar go the '**add new…**' > **event** and fill in information to create an item, save and publish it, then step back up to the events folder and create a second one. Make sure both events are taking place this month.

• Now look at your home page again and note the changes

6. Working with portlets

More about portlets

Portlets are modules that allow extra (often dynamic) information to be added to any page, adding the formatting while you add the content. For instance, rss files to be displayed, several rss files to be collected together and displayed, a calendar, a list of links or a box of static material, an upload tool, etc. (You have already added an upload portlet to the images folder, so have had some contact with them.) When you have published a news, events or jobs item, if you have the news, events and/or jobs portlets set to appear on pages, then they will become live with links to the details (news and events portlets are on your pages by default). These portlets appear because the streams of information generate an rss feed, so you could then direct other sites to these rss feeds (the link appears when you hover over the rss icon). If you are showing a calendar in your portlets, the events will also become a link in the calendar.

In Falcon there are a range of different portlets. Some can be added only in specific locations:

- most can be added on the right side of any page
- all can be added either to the content area or to right side of the home page
- an image/carousel can be added to the content area of a second-level folder
- * the site footer is a special kind of portlet, which is added site-wide through the home page, but can be modified on folders in the site

The portlets shown on the right side of the home page will be inherited through all folders and pages unless this inheritance is blocked, and different portlets (or none) may be show on any page. Different portlets can be added even when portlets are being inherited, but inheriting portlets is an on/off function - if you want to keep only one of a group, you will need to block them all and manually add back the one you want to keep.

Managing portlets on the home page

The home page for your falcon site is already for you to edit or assemble. Once you have logged in, if at the top level of your site you look at the **'Display'** tab in the editing bar, you will see that there are two options:

If you leave the display settings as they are, you can use the **'Edit'** tab in the normal way to add content to the page. If you access the 'Manage portlets' link, you see these options available:

Manage portlets for Welcome to Falcon

Carousel

Add portlet... ▾

Portlets assigned here

Block/unblock portlets

Parent portlets: Block ▾

Group portlets: Use parent settings ▾

Content type portlets: Use parent settings ▾

[Save settings]

Return

Info You are managing the portlets of the default view of a container. If you wanted to manage the portlets of the container itself, go here.

The portlet columns will first display portlets explicitly assigned in this context. Use the buttons on each portlet to move them up or down, delete or edit them. To add a new portlet, use the drop-down list at the top of the column.

If you wish to block or unblock certain categories of portlets, you can do so using the drop-down boxes. Portlets that are included by these categories are shown below the selection box.

Add portlet... ▾

Portlets assigned here

Block/unblock portlets

Parent portlets:

Do not block ▾

News

Events

Group portlets:

Use parent settings ▾

Content type portlets:

Use parent settings ▾

[Save settings]

Add portlet... ▾	Add portlet... ▾	Add portlet... ▾	Add portlet... ▾
Portlets assigned here	**Portlets assigned here**	**Portlets assigned here**	**Portlets assigned here**
Block/unblock portlets	**Block/unblock portlets**	**Block/unblock portlets**	**Block/unblock portlets**
Parent portlets:	Parent portlets:	Parent portlets:	Parent portlets:
Do not block ▾	Do not block ▾	Do not block ▾	Do not block ▾
Group portlets:	Group portlets:	Group portlets:	Group portlets:
Use parent settings ▾	Use parent settings ▾	Use parent settings ▾	Use parent settings ▾
Content type portlets:	Content type portlets:	Content type portlets:	Content type portlets:
Use parent settings ▾	Use parent settings ▾	Use parent settings ▾	Use parent settings ▾
[Save settings]	[Save settings]	[Save settings]	[Save settings]

This display option allows you to add a large image (or several to make a carousel), which will appear at the top of the page, and portlets on the right side of the page. This can be thought of as a simple type of home page, and will be what you'll see when content is migrated into the new templates from the old templates.

The alternative setting on the **'Display'** tab is for the **'Teaser home page'**, which is the home page design the new templates are been built for. In the delivered templates an institution (department, research group, project) home page has the following model, which does not allow for any text content:
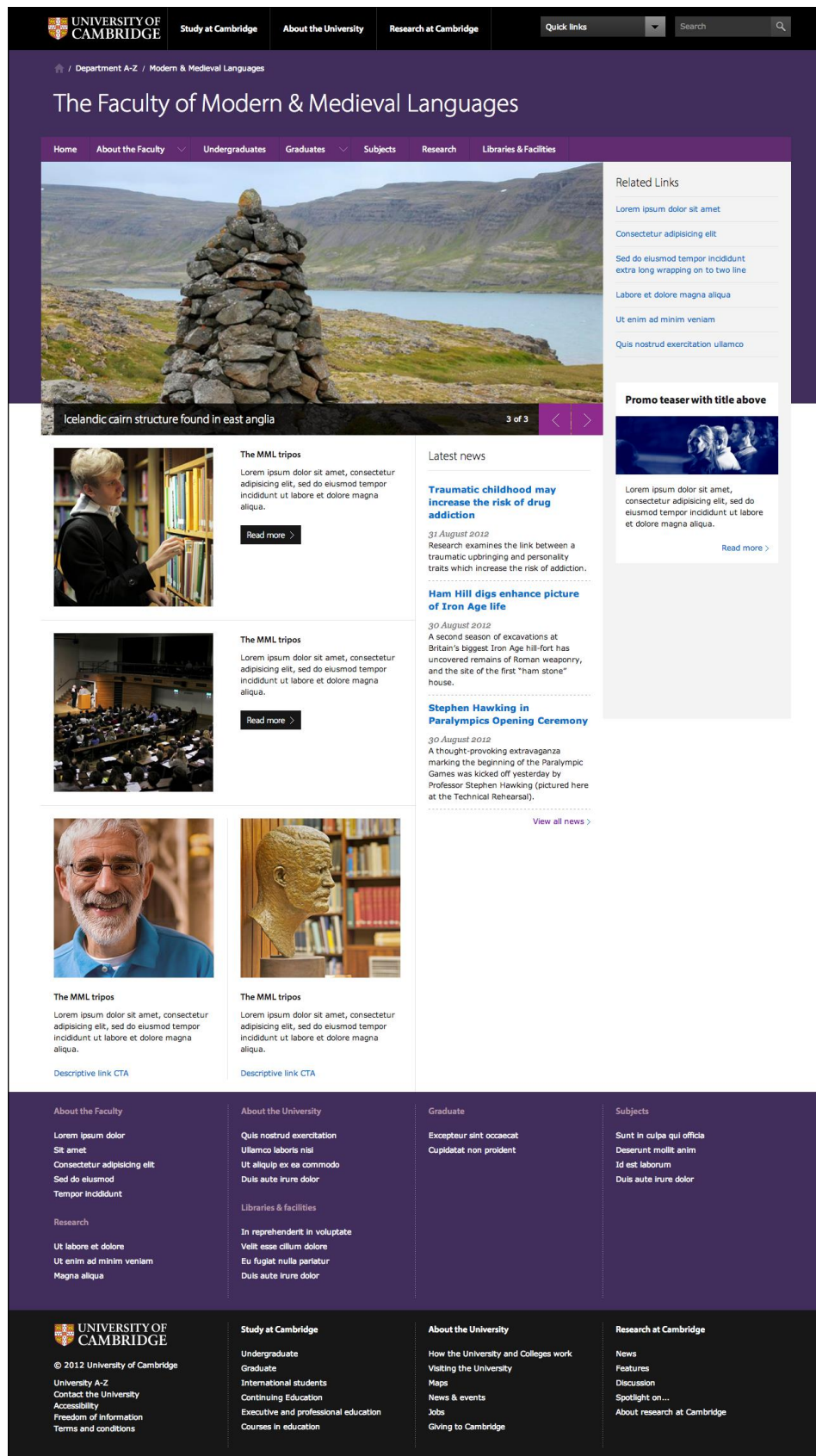
Breadcrumb

Site title

Carousel or single picture

Caption for image(s)

Teasers – horizontal

Teasers – vertical

Institution footer

Global header

Navigation bar

Links

Teaser

News

Global footer

A sample page similar to this may be seen at http://www.websupport.cam.ac.uk/Project-Light/template-variants/section-landing.html

The UIS home page (www.uis.cam.ac.uk) looks like this:

As you can see the page comprises of four columns:

- the image takes three columns and the portlets on the right fill in the fourth column alongside.
- under the image, the teasers take the left two columns, and can be positioned vertically or horizontally, with or without images.
- the third column under the image can be used for a number of different portlets – one or several rss feeds, news, events, jobs or a teaser portlet (which is different from a teaser).
- the site footer is built from four columns but they don't all have to be filled.

How the teaser home page is controlled

When you first switch your display to the teaser home page the screen you'll get will be similar to this – in this example, because I have added a news item, the feed is showing on the right side of the holding image:

The '**Manage portlets**' screen for the Teaser home page allows you to add component portlets in various areas of the page, and looks like this:

What you can add

You will need to prepare and upload the images you want to use on your home page – they need to be at least the following sizes:

- **home page**: carousel/large image **must be** 883 x 431px; (if you are going to add a caption this will cover a 50px high strip at the bottom of the image)

- teaser image - 250px square – recommended size

- teaser portlet: 349 x 125px – recommended size

Make sure you optimize the images so the files are as small as possible, especially if you are using a carousel containing several. If in doubt about sizing and optimizing images, please get in touch with falcon-support@uis.cam.ac.uk for help.

CAROUSEL

To insert an image or images for the carousel, go to the pop-down and select **'Carousel Image Portlet'**:

Carousel

✓ Add portlet...
Carousel Image Portlet
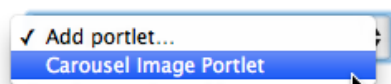
You will then see a screen like this:

Configure portlet

Image
◉ (nothing)
[   ] [browse...]

Carousel Image Caption
Set a custom caption for the rendered image. Leave empty to use the selected content's title.
[   ]

Carousel Image Title
Set title tag for the rendered image
[   ]

Carousel Image Alt Text
Set alt text for the rendered image. Can be used as image credit. Leave empty to use selected image's title.
[   ]

Content Item
◉ (nothing)
[   ] [browse...]

External URL
Image may link to an external URL or content item.
[   ]

[Save] [Cancel]

- browse to select the image you want to add

- add a caption for the image if you want. It will be added on a 50px high black band overlaying the bottom of the image.

- Add image title (which will be shown when the pointer hovers over the image) and the alt text for the image. Either could contain the credit for the photo – the alt text ought to be descriptive for those who use a speaking browser.

- add either an internal or external link for the image – this is where the user will be taken if they click on it.

When you save this configuration, you will see the item has been added under the Carousel section of the portlet screen:

To add another item, go to the pop-down menu again, so you build up a list of items. If you want to delete an item, click on the orange cross on the right of the line. You can deselect items for the carousel by clicking on 'hide' to rotate a selection, and you can reorder them. Remember that the carousel always starts from the first image, so it is seldom worth having more than 3 images in the carousel at a time. You can start with more than that and rotate whether they show or not, and change their order.

PORTLETS ON THE RIGHT

When you select the 'Add portlet' pop-down list, the options available look like:
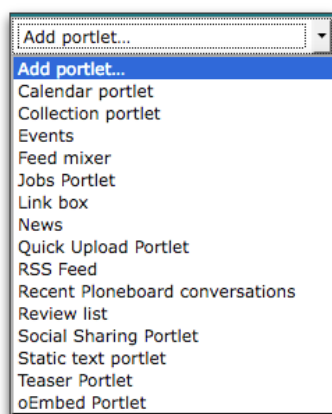
This is the full list of portlets – some of these are also available in the third column or under the teasers. This is what they are all for:

- **Calendar portlet:** Adds the standard Plone calendar.

- **Collection portlet:** This allows you to show the rss feed from a collection. Collections are created to make a list of items that share certain characteristics, and are dealt with in the Falcon Part 3 session.

- **Events:** Along with separate but similar portlets for **News** and **Jobs**, this portlet collects the titles of Events and displays them as a list with a link to the full entries. If you add an Events portlet you can select how many items to display - you should leave the Workflow state as configured, unless you have special reasons to do otherwise.

- **Feedmixer and RSS Feed:** These portlets are both for adding RSS feeds to your page. The first allows you to mix two or more RSS feeds together, while the second allows you to just insert one feed. When adding a **Feedmixer portlet**, since the links for the different feeds look the same, you need to be careful that you give the portlet an accurate title. Be aware that there may be quite long titles and displaying more than 4 or 5 items could take up quite a lot of space.

  To add a single **RSS feed portlet**, the set-up screen is very similar but only a single rss feed can be added. Do be aware that this publishing system will not publish badly structured feeds - the Feedmixer portal will not work at all if one of the feeds is badly structured.

The RSS portlet has been set up to recognise RSS feeds from talks.cam and alter the footer text accordingly. Additional information is available about finding the URLs of RSS feeds is available at https://falcon-help.csx.cam.ac.uk/home-page/content/portlets/rss-urls

- **Link box:** To create a link box you just need to add the URLs and link text to the portlet. A choice of social media icons can be added next to external links.

- **Quick upload portlet:** Allows you to upload a batch of items into the current folder. Needs to be enabled for any folder requiring quick upload. There is more information about settings for the portlet at http://plone.org/products/collective.quickupload

- **Recent ploneboard conversations and Review list:** These portlets will only work either if you are using ploneboard or if you are an admin user who moderates other user's submissions. They are included in the right-hand column but aren't appropriate below the content.

- **Social sharing portlet:** Uses the Sharing ID and the targets configured in the Site customization setup to create the portlet. Different Sharing IDs can be used in the portlet itself if one part of a site uses a different one.

- **Static text portlet:** This is useful if you need to make a long-term announcement or add a block of text that refers elsewhere for full information. A static text portlet can be used to add just an image or to add an iframe. If you add an iframe into a static text portlet you need to paste the code while the wysiwyg editor is in 'html mode'.

- **Teaser portlet:** This can be used instead of a static text portlet as it is better formatted, with a specific size of image it expects.

- **oEmbed portlet:** This allows you to add a small video in the right-hand portlets, using oEmbed, which only requires you to add the URL of the video-hosting page. This works for the SMS and the University map as well as third-party sites such as YouTube and Vimeo

Because the portlets in the content area can only be added to the home page, you do not have to worry about the settings in the **'Block/unblock portlets'** area of the page. When portlets are used in the right hand column these settings are important: if you don't want inherited portlets to appear in a folder, when you create it select **Block** against 'Parent portlets:' and then save the settings. Leave the 'Group portlets:' and 'Content type portlets:' settings as they are.

TEASERS

To add teasers to the home page, go to the pop-down and select **'Teaser Portlet'**:

Teasers

Add portlet...

Add portlet...
Teaser Portlet
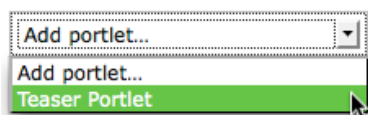
You will then see this configuration screen:

The options are pretty self-explanatory:

• the heading, any accompanying image, the image title (as the alt text for the image) and the text

• the choice to make the teaser horizontal or vertical

• the type allows you to add an icon if the teaser is for video or audio content

• you can add a link to an internal item or an external url

• you can replace the **'Read more'** link with other text if it is more appropriate.

As usual, you will need to save the item – you will then see that item listed under the teaser heading on the home page portlet management screen. When you have added some more, you can reorder them or hide some of them to rotate a selection.

PORTLETS IN THE THIRD COLUMN

To add some portlets in the third column of the page, the choice is limited to the following:
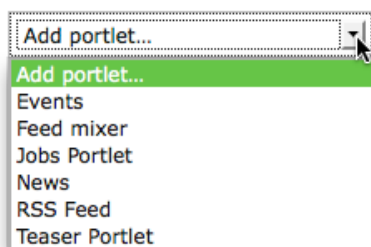
You will want to balance the portlets in the third and fourth columns so the page is even.

36

PRACTICAL 10:

•   At the home page, click on '**Manage portlets**'. You will see a list of portlets that are being shown (if there is any content to show) both on the right side and in the content area. Click back onto '**Home**' in the navigation bar, or the site name in the breadcrumb trail.

•   Now go to '**Display**' and select '**Teaser Home Page**'. At the home page, click on '**Manage portlets**'. You will see a far more extensive list of portlets that are being shown both on the right side and in the content area.

•   Under the Carousel heading at the top, use the pop-down to insert an image for the carousel – there is a suitable image in the images directory of your site.

•   On the right side, select **RSS feed** from the '**Add portlet**' pop-down menu and add an rss feed of your choice – if stumped go to http://www.bbc.co.uk/news/ and copy the url of the rss feed there.

•   Insert at least one teaser, without inserting an image for it. In the third column below the large image, insert a teaser portlet, selecting the labeled image in the images folder.

•   Return to the home page to view the results.

Day 2

- Inheriting portlets and adding a footer

- Adding more complex content to pages

- Adding users and groups, and restricting access to content

7. Blocking portlets and adding a footer

Blocking portlets

The portlets shown on the right side of the home page will be inherited through all folders and pages unless this inheritance is blocked. Different portlets (or none) may be shown on any page. Different portlets can be added even when portlets are being inherited, but inheriting portlets is an on/off function - if you want to keep only one of a group, you will need to block them all and manually add back the one you want to keep.

If you don't want inherited portlets to appear in the right-hand column of all contents of a folder or a page, select **Block** against 'Parent portlets:' and then save the settings. Leave the 'Group portlets:' and 'Content type portlets:' settings as they are. To block portlets for a folder you will have to select 'Manage portlets' on the default page and then follow the link to the container.
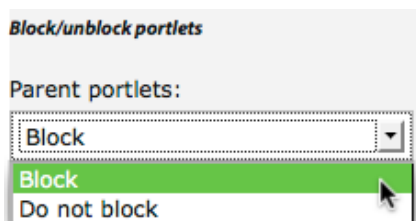
If you want to add different portlets and block inherited ones, add the new ones first, then block the inherited ones. If you don't save the settings the blocking process will not occur.

Setting the site footer and customising it for sections of the site

The site footer is set on the home page, as one of the portlets accessed via 'manage portlets'. It is at the bottom of the screen, and by default looks similar to this on the home page:

and like this in the 'manage portlets' view:
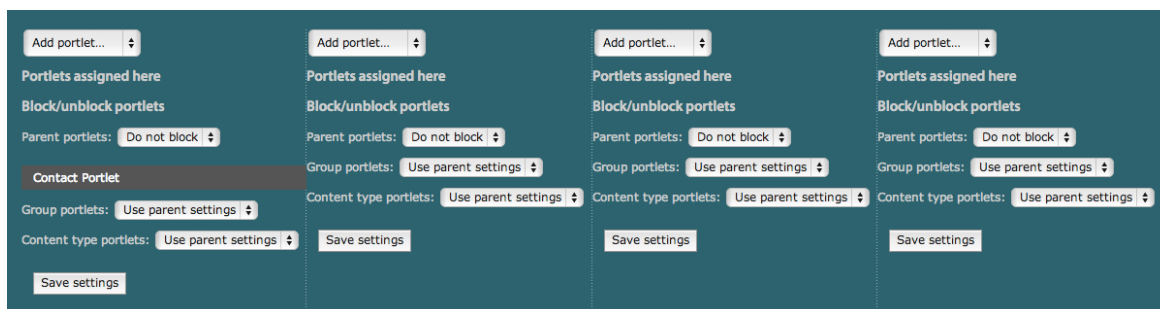
There are two kinds of portlet that can be added, a **Contact portlet** and **a link box**. The 'Contact Portlet' that appears by default contains the contact email address given in the configuration of the site (usually the role-based address). The 'Contact Portlet' can be modified by selecting it, when you will see this screen:

Link boxes can be added in any of the other three columns, linking to information of importance for your site. To add it you select the portlet type in the column you want to add a list:

CHANGING THE FOOTER ELSEWHERE IN THE SITE

If you want to change footer information on the pages in any folder, go to the 'Manage portlets' link on the folder (not the default page of the folder), block any of the parent portlets that you want to remove, and if necessary add new portlets for those columns.

PRACTICAL 11

•   Go to your widgets folder default page and click on '**Manage portlets**'. If you have set a default page for the folder, use the link in the Info box to edit the folder rather than editing the default page.

•   Under '**Portlets assigned here**', use the popdown to set '**Parent portlets**' to '**Block**', then click on '**Save settings**'. Go back to the top level of the folder to see that the blocking has worked.

8. Adding more complex content to pages

An earlier section described how to add simple content to pages – there is some content that you can add that requires a little more description:

- using built-in styles

- scaling large images

- long pages can have a table of contents automatically added at the top

- tables can be difficult to add effectively

- video can be embedded

- iframes can be added before, after, in content or in a static text portlet

- adding an image or carousel to a second level page.

Using built-in styles

The pop-down list in the editing bar gives you access to styles that you can add. The example below shows adding a style to an existing link, to add an icon. There is a variety of styles available, drawn from the University House style.
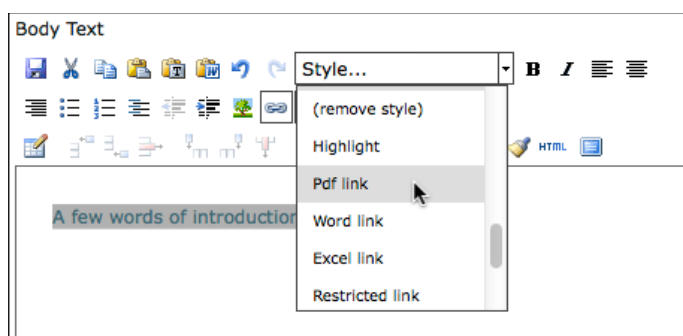
Scaling large images

If you add an image on a line by itself and you wish it to fill the width of the window, there are two ways of doing it. First add the image, selecting 'inline' as the setting. Then

- In the HTML view, you can edit the image tag to add width value for it "100%" (width="100%") and this scaling will happen.

  If the image has a caption added, this will happen automatically.

- If you don't want a caption, check the caption box and add a space for the caption, then the scaling will be set.

Long pages

If you have pages with a lot of content, broken up into sections with headings, you can format the page to automatically have a table of contents at the top. To do this, when you are editing the page, go to the '**Settings**' tab at the top of the page and check the box next to '**Table of contents**' and save. You will not see the table of contents in the '**edit**' view of the page, only when viewing it.

Dietary nitrate and tissue fat oxidation

Sub-heading

Next down

Supervisor: Dr Andrew Murray, Dept. of Physiology, Development and Neuroscience

Nitrate is a ubiquitous dietary component, present in large quantities in leafy green vegetables, and the stable end-product of nitric oxide (NO) biosynthesis. Nitrate supplementation has been shown to improve mitochondrial efficiency in man, increasing ATP production for a given amount of oxygen consumed. Work in our

Tables

Within the body text editing bar there is an icon for 'insert table' that, after you have specified number of rows and columns, inserts for you an adjustable table framework (add the class 'standard' to the table to take the width of the column and be a coloured grid). If you view the html version of the table you may see issues with the code you wish to fix, such as breaks being added. The 'Advanced' tab allows you to add a caption for the table, should you wish one.

EXAMPLE 2 X 2 TABLES

With the class 'bare' applied to table:

Col 1	Col 2
one	two
three	four

With class 'standard' applied to a 2 x 2 table you will first see this:

To set the first row to the darker tine, for each cell in the top row select 'Table header' from the styles list:
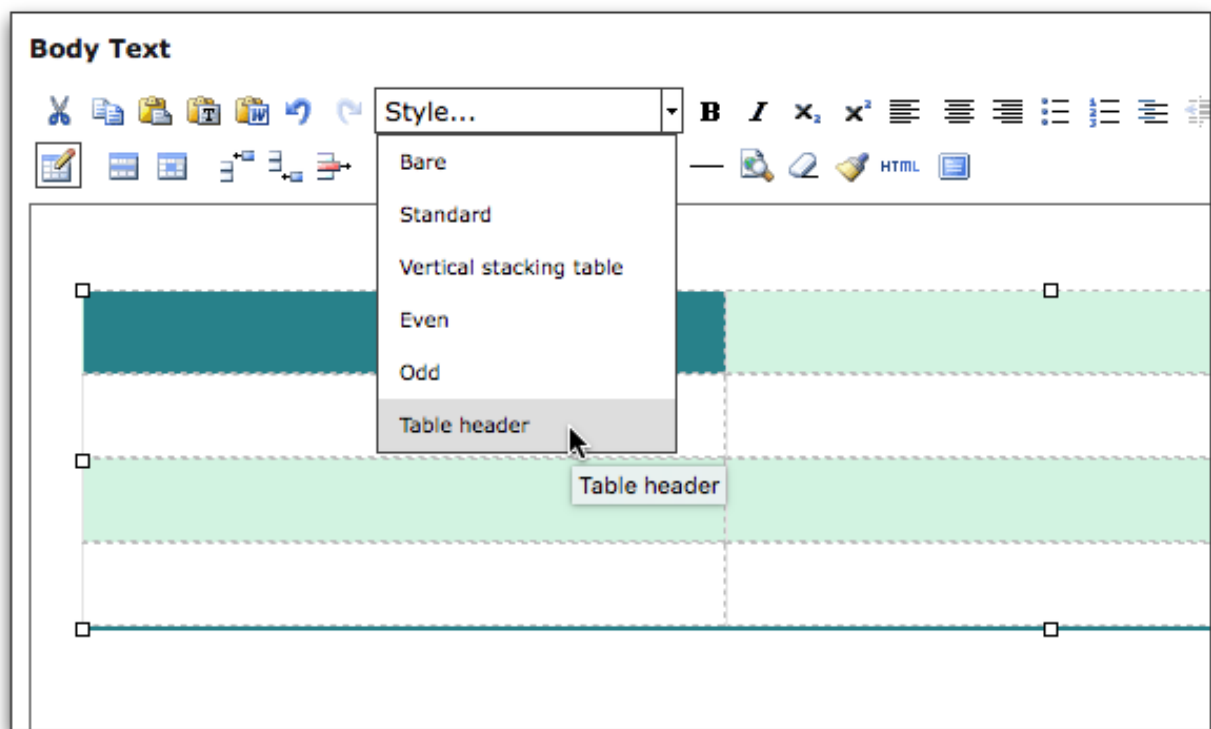
While sites are being updated (May 2017) you will need manually to adjust the html of the table to create a head row at the top. To do this click on the 'HTML' button on the editor toolbar (), then in the code (which will be similar to this):

```
<table class="data">
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Change the <td> tags in the first <tr> to be <th>:

```
<table class="data">
<tbody>
<tr>
<th></th>
<th></th>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

The table will now look like this:

To add more rows put the insertion point into the second row (not the header) and click on

Col 1	Col 2

If you have a complex table that you want people to be able to use on a mobile device, you can use the style 'vertical stacking table' – please ask advice from falcon-support@uis.cam.ac.uk.

Once you position your cursor into the content of the table, more controls appear in the editing bar to allow you to add and remove rows and columns and to add properties to rows or cells

Once you have added the content, save the page. You are then taken to view the page, and if you are ready, you should publish it (select the right-hand 'state' tab and choose 'publish' from the pop-down). If you wish to assemble the content in full before publishing it, you can publish the folder and contents later.

If you have a complex table and some html knowledge, it may be easier for you to assemble it in an html editor and then paste it into the html view of your editor window.

Embedding video

When you use Falcon we expect you to upload your video and audio to the streaming media service (http://sms.cam.ac.uk/) and then either link to it from Falcon or embed it in your web page.

ADDING EMBEDDED CONTENT ABOVE OR BELOW THE BODY TEXT OF A PAGE

May 2017: Currently adding content from the SMS via oEmbed doesn't work properly – while we are solving the problem you can use the manual embed technique, which works fine.

When editing a page there are now two options to use oEmbed to add a video or the University map (http://map.cam.ac.uk - or any other oembed-enabled media service, such as Vimeo, Soundcloud, YouTube) either above or below the body text of the page. The inserted video or map will size to fit 100% of the page width and resize responsively. You just need to paste in the URL of the item into either the top or bottom oEmbed field:

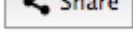You can still use the manual method of embedding video into the content using insertion of the iframe code, if you want the embed to appear within the text (see below).

There is also an oEmbed portlet so you can add video content to the right side of a page.

TO EMBED AN AUDIO OR VIDEO PLAYER FROM THE SMS WITHIN THE BODY TEXT

If you really need to embed the item within the content of the page, the process is rather more complex and uses an iframe. An iframe allows content, which is usually dynamic, from a different location to appear within an area of your page.

First you need to go to the sms page the item is on. Below the video player, there is a button [Share] . When this button is clicked on a box is revealed that contains the code you need to use for adding to a web page to embed a player for the media. The popdown box allows you to choose a size for the player, and then you should select and copy the code:

Share this media item:

Embed this media item:

```
<iframe width="1280" height="720" src="//sms.cam.ac.uk/media/1439801/embed?width=1280&amp;height=720" frameborder="0" scrolling="no" allowfullscreen></iframe>
```

Choose size ✓ 1280x720
640x360
480x270

Then in the editor window:

• Go to the **HTML view** of the page, find the point where you want the video to appear and paste in the code you have copied. Make sure you are placing the video between paragraphs, for instance:

```
<iframe width="480" height="360" src="//sms.cam.ac.uk/media/2300738/embed" frameborder="0"
    scrolling="no" allowfullscreen></iframe>
```

The player will then appear on the web page, although in the edit view you will just see a tint box.

Remember to add a link to the sms page (or page on other service) that features the video or audio as it gives access to a textual description and to alternative versions of the media (which people with poor connections or smartphones might need). The video will not play at **full screen** when embedded in this way or when embedded in a static text portlet, but in oembed portlets or at the top or bottom of content it will.

CREATING A SCALING VIDEO EMBED

When you have added the iframe code for video, if you add a <div> around it with class="scale-iframe" as follows, and remove the dimensions, the video embed will resize dynamically:

```
<div class="scale-iframe"><iframe
src="//sms.cam.ac.uk/media/1439801/embed?width=1280&amp;height=720" frameborder="0"
scrolling="no"></iframe></div>
```

NB: The dimensions will be added back in by YouTube but the dynamic sizing will still work.

For some video hosting this might not be necessary, as they may resize to 100% without the addition of a style.

TO EMBED A YOUTUBE VIDEO

See http://support.google.com/youtube/bin/answer.py?hl=en-GB&answer=171780 for how to embed. Choose 'Enable privacy-enhanced mode' to ensure cookies aren't being used.

Embedding an iframe with other content

By default you can add an iframe into a static text portlet that appears in the right side of the page or below the content on the home page, and into the content of the page. (The oEmbed portlet is now an easier way of adding embedded content from an oembed-enabled source using just the URL of the content.)

To insert the iframe code into a page:

• Copy the iframe code from your source. In your editor, **go into HTML mode** and paste in the code where you want it to appear, the click 'update'. In your editor window there may be a complaint that it won't work, but when you save the page, the iframe will appear.

CREATING AN IFRAME TO THE UNIVERSITY MAP

If you don't use the quick oEmbed method of inserting a map onto your pages, there is a manual method so you can insert a map within the content area of a page. When you embed the map into your web pages any changes in the map will be seen automatically and people can zoom in and out. The technical information for how to add an iframe can be seen on https://wiki.cam.ac.uk/university-map/The_Embedding_API, which is linked to from the 'Help' section of the map (http://map.cam.ac.uk/). Note that you need to embed using a protocol-less url. The map server can accommodate this fine. A map embed can be configured to fill the screen width without having to add the scaling style shown above.

For a standard embed, say for the UIS, the embed code looks like this:

    <iframe src="//map.cam.ac.uk/University+Information+Services "></iframe>

For a map embed to resize automatically to the width of the page, make the width dimension 100%, eg

    <iframe height="240" src="//map.cam.ac.uk/University+Information+Services " **width="100%"**></iframe>

To get automatic zoom, add zoom factor from 13 (least) to 19 (greatest), like this:

    <iframe height="240" src="//map.cam.ac.uk/University+Information+Services **#18**" width="100%"></iframe>

Creating iframes to Facebook, Twitter and google calendar

• There is help and screencasts on embedding content at http://falcon-help.csx.cam.ac.uk/content/complex-content

• In Facebook some **social plugins** are added as iframes – see https://developers.facebook.com/docs/plugins for info about what you can do and how to do it.

• For Twitter you can only add buttons as iframes – see https://dev.twitter.com/docs/follow-button and see https://dev.twitter.com/docs/tweet-button

• For Google calendar, go to **Settings** and click on the calendar or calendars you want to use, then the iframe code you want is under '**Embedding this calendar**' - it can be customised.

* Interactive Google charts can be embedded via an iframe by inserting them into a Google spreadsheet – see https://developers.google.com/chart/interactive/docs/spreadsheets

Embedding content by JavaScript

You can embed content, such as a Twitter timeline and a content table from talks.cam (for instance go to http://talks.cam.ac.uk/show/index/5769 > 'Further detail' (immediately under title) > 'Create Custom View') by using JavaScript on the page. To do this you first have to change the html editor settings to allow JavaScript to be added to pages, and you should not take this step before considering whether you trust all content editors not to add insecure JavaScript that could result in your Falcon site being compromised.

Details on what you can currently do can be found at http://falcon-help.csx.cam.ac.uk/content/complex-content.

Adding an image or carousel to a second level page.

You can use the 'Manage portlets' link on a second level page or folder to add a large image or carousel to the top of the page. You do this in the same way as adding such an image to the home page, but you must use an image of the smaller size (590 x 288px).

PRACTICAL 12:

- Go to your widgets folder and to the page where you added a link to the pdf file. Select the pdf file link and style it using the pop-down style for a Pdf link.

- On another page in your widgets folder, add a table, with 3 columns and three rows, using class 'standard' for the table as a whole and add the style to tint the top row.

- On another page in your widgets folder either

  - embed a video from http://sms.cam.ac.uk/ above or below the content using the oEmbed box, following the instructions above.

  - manually embed an iframe within the content area, following the instructions above.

- On a second level of your site, go to 'Manage portlets' and insert a single image or several to make a carousel.

9. Adding users and groups, and restricting access to content

There are many different 'levels' of users within Falcon, as shown below (this is the standard set, in Falcon there are some additional roles that have been added by Faculty Staff Directory – for which see the 'Further' course for site managers). Most commonly seen are 'members' and 'managers'. At the time the site is set up managers are configured in programmatically, so don't appear on the users list, but more can be added by an existing manager, who can also add members to the site.

If you add a research directory, everyone with a profile added will become a member of the site (and with their Raven credentials in their profile they will be able to log in) and will not need to be added using the method below.

- **Contributor** - a user with a contributor role can add content and submit it for review. Such user can also view another user's content that is not in the published state, but cannot edit it.

- **Editor** - a user with an editor role can edit content by self or others. He can't add new content, but can edit existing content. Such user can manage content properties and submit content for publication.

- **Member** - this is the most common role for site users. Users with this role can see anything that is published on site, but cannot add new content or edit it. This role is assigned to normal users who join the site but will not be doing any changes to the content (apart from their profile in the research directory).

- **Personnel Manager** – this is a category added by the research directory to manage other people's profiles.

- **Reader** - users with a reader role can read content by others, they can view content items that are in a private state, but cannot make any changes.

- **Reviewer** - a user with a content reviewer role has the power to edit/publish content that has been submitted for review, but cannot create new content. There is a special portlet for Reviewer that gathers content that needs to be reviewed.

- **Site Administrator** - a site administrator has super user powers within Plone site. Such user has full access to manage content and configuration in a Plone site, but does not have access to the Zope Management Interface and other places, where system administration or Plone integrator/developer skills are required.

- **Manager** - a user with a manager role can do everything. Such user has access to the control panel, where many site wide settings can be changed and updated. Manager can also manage things via the Zope Management Interface.

Adding users and administrators

- To add users, a current manager of the site must log in and go to **'Set Setup'** (in the top right corner of the browser window).

- Select **'Users and Groups'** and select **'Add New User'**

- Enter a full name and their user name, which needs to be in the form **crsid@cam.ac.uk**. If a user normally uses an @cam email address then you know their crsid, if not you can use Lookup (http://www.lookup.cam.ac.uk/) to find what their crsid is. You will also need to add their email address. Click '**Add user**'.

- On the '**User overview**' page you have been returned to, the user you have just added will have been added as a member for the site. You will see their crsid@cam.ac.uk under their name in the user list, like this:

  If you wish them to be a manager, tick the box under '**Manager**' and then '**apply changes**' at the bottom of the table.

- If you make a mistake with the user name when you add a user, you will have to remove the user and add them again. You can't correct a user name.

Research directory members as users of the site

When you have added people to the directory, you will see them listed as users. They will all be marked as a

'Member' of the site by the Plone icon and under their name you will see a long string, similar to this:
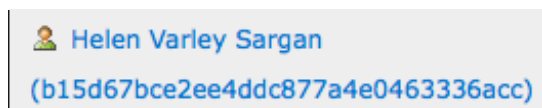
Being a **member** of the site (with their Raven credentials added) gives them edit access to their profile in the Research directory and the ability to see all published content.

UK FEDERATION SITES

If your site is registered with the UK Federation, the system for adding new members is different. Instead of trying to find out what a user's account credentials are (which has always been very difficult), the user is set up with their email address, then they are invited by email to join the site. When they follow the link from the received email and authenticate to the Falcon site, their account credentials are captured.

If you need to find out more about UK Federation then get in touch with falcon-support@uis.cam.ac.uk.

PRACTICAL 14:

- Talk to your neighbours in class, find out what their crsid is and add them as a manager of your site. Check that they can log in to your site and you can log in to the site to which you have been added.

Removing users

If you need to remove a user from the site:

- Go to '**Set Setup**' (in the top right corner of the browser window).

- Select '**Users and Groups**'

- Check the box on the far right end of the row for that user, in the column 'Remove user' and click on 'Apply Changes'

Go to the content areas where that user had any editing or viewing privileges and remove them also.

Removing users added via the directory:

A user added by having a profile in the research directory can't be removed via 'Users and groups' (the check box at the right end of the line is not responsive).

- first edit their profile and remove them from any categories or themes

- then to go to the Content tab view of the directory folder and check the box by their profile then click the 'Delete' button at the bottom of the screen

Creating groups and adding users to them

For easier management of users, those with identical roles can be grouped. Certain roles may be assigned to a group, and then, whenever you want to give someone that role, you can add the user to that group. The users in a research directory are automatically allocated to groups corresponding with the categories to which they are assigned.

For instance, if you want to give a group of users access to view committee papers, you can set up a group, assign access to the papers to the group and add and remove users when need be.

A special virtual group exists in your Falcon site for 'Cambridge users', which consists of all Raven authenticated users. You can use this group for setting up 'Cambridge-only' access to folders or to the whole site (for more information see http://falcon-help.csx.cam.ac.uk/site-setup/raven-whole and http://falcon-help.csx.cam.ac.uk/site-setup/raven-part). You will see other groups listed, some of which will have been created by the system and others by the categories in your research directory.

Note: Don't use the group 'Logged-in users' to give access to content. Not only will this give anyone with a Raven account access but it will also cause issues with the Cambridge-limited search results.

To create a group

- A current manager of the site must log in and go to '**Set Setup**' (in the top right corner of the browser window).

- Select '**Users and Groups**', select '**groups**' from the tab bar, and on the next screen select '**Add new group**'. The screen will look similar to this:

- Once you have named and saved your group you can assign users to it. Click on the group name. You will see a screen that shows you the members currently in the group and allows you to search though current users to add them to the group – once users have been added, the screen will look similar to this:

- Users can be assigned to any number of groups. Users must have been added to the site before you can add them to the group!

Giving roles to groups

As you can see from the screen above, it is possible to give roles to groups. You have to think this through carefully since it means that everyone in that group will always have that role throughout the site. I prefer to give editing/contributor access on the content rather than via the role. There is some more explanation at

- http://www.sixfeetup.com/blog/basic-roles-and-permissions-in-plone and

- http://quintagroup.com/services/support/tutorials/roles-permissions

Controlling access to content

On a folder or page level, access is controlled via the '**Sharing**' tab on the editing bar:

- if you want to only give **view access** to a limited number of people, the content must be kept **private**. **Published** content is always available to everyone.

- some groups are already set up for you – one of these is 'Cambridge users', which equates to everyone who can log in with Raven.

- don't use the group 'logged in users' to give access to Raven-authenticated users.

Making a folder Cambridge-only accessible

You may wish to make one or two folders on your site accessible only to Cambridge users - here's how to do it:

- At the top level of your site, create a folder and add into it your content, leaving it all private rather than publishing it

- Go to the top level of the folder for which you want to change the access and in the editing bar click on the '**Sharing**' tab.

- If you have chosen a default page for the folder, you will see the following at the top of the Sharing page - if you do, follow the link to change the settings for the whole folder.

- Search for '**Cambridge users**', and tick the box '**Can view**'.

You can control who can view and edit your item using the list below.

user/group	can add	can edit	can manage personnel	can view	can review
Cambridge Users	☐	☐	☐	☑	☐
Logged-in users	☐	☐	☐	☐	☐

☑ Inherit permissions from higher levels
By default, permissions from the container of this item are inherited. If you disable this, only the explicitly defined sharing permissions will be valid. In the overview, the symbol ✅ indicates an inherited value. Similarly, the symbol 🌐 indicates a global role, which is managed by the site administrator.

save cancel

- Save this setting. Since this setting has been done on the folder and is set to be inherited, all sub-folders and pages will assume similar settings, which will be shown by a white and green tick.

To make the folder visible in the navigation bar, go to the top level of the site and go to the contents tab in the editing bar.

- Check the box to the left of the folder you wish to change and click on '**Change state**'

- On the following screen, ensure you do **not** have a tick by '**Include contained items** ' and then select '**Publish**' from the option at the bottom of the page and save.

Double check that the folder is now published but the content is still private. The item will now be in the navigation bar but when users check on it they will have to give their Raven details to access the content.

You can use the same technique to make the folder viewable by a different group of users or just by an individual – the restricted content must be left unpublished for the effect to work.

Making a folder or page editable by an individual or a group

You can make pages editable by an individual or group by following the same steps as those above, except that the content is published.

Once pages have been published, you can make them **editable** by a member of the site who doesn't have admin rights. To do this, first you publish the pages, then:

- Go to the top level of the folder for which you want to change the access and in the editing bar click on the '**Sharing**' tab.

- If you have chosen a default page for the folder, you will see the following at the top of the Sharing page - if you do, follow the link to change the settings for the whole folder.

- Search for the name of your user or group, and tick the box '**can edit**', which will allow them to edit existing pages If you tick the box '**can add**' then they will be able to add pages as well. They won't be able to delete pages.

PRACTICAL 15:

- In the last practical you added a neighbour as an administrator of your site. Go back to the users setup page and change their permissions from a user to a member.

Adding users from a lookup group

Setting up the configuration

Go to the following URL or navigate to Site Setup ->ZMI -> acl_users -> ucamgroups:

> https://www-falcon.csx.cam.ac.uk/site/**YOURSITE**/acl_users/ucamgroups/manage_ucamgroups

or

> https://www.**YOURSITE**.cam.ac.uk/acl_users/ucamgroups/manage_ucamgroups

You need to access www.lookup.cam.ac.uk as well at this point and look up your institution. There you will find out your institution ID and can select from the groups your institution has:

•   Add a list of lookup INSTIDs and groups to the first two lines (separated by a space).

•   Ignore the third line - this can be used if you need to add a dynamic group from another institution (ask falcon-support@uis if you think this applies to you).

Using the groups

The list of instids and groups listed there then appear on:

> https://www-falcon.csx.cam.ac.uk/site/**YOURSITE**/@@usergroup-groupprefs

(this is the usual screen for looking at available groups) as **inst:NAME** and **group:VALUE** and you should be able to use them as normal Plone groups.

•   Since the members of the group are added dynamically, you won't be able to see a list of the members of the group.

•   When you change the access to part of a site using a lookup group, users will need to restart their browser and Raven authenticate so that the group credentials are loaded. They will also need to clear any caches on their computer and on any firewall between them and Falcon.

Adding users from outside Cambridge

Falcon sites use Raven-Shibboleth authentication, which is why you are registered using crsid@cam.ac.uk as your username. If we register your site with the UK Federation it may be used for full Shibboleth authentication so people from other institutions with Shibboleth IDs can become members of the site. To gain UK Federation registration, email falcon-support@uis.cam.ac.uk.

Logging in to a Shibboleth authenticated site

When you use a Shibboleth-protected site, you will first see options to 'log in using Raven' or 'log in using UK Federation'. When a user opts to log in with Shibboleth, they will see the UK Federation login screen. They will need to either select their home organisation from the (long) pop-down list or search by keyword to find it, and then select it. Once they have selected their home organisation, their authentication screen will be displayed and they will log in as usual. You can see the UK Federation log in screen at http://falcon-scratch.csx.cam.ac.uk/

The future

All sites use the 'Project Light' templates. We are currently updating all sites to the latest version of Plone 4.3, and have just included some new features.

Further information

- There is a further course for site managers that covers a wide range of extra functionality – see http://training.cam.ac.uk/course/ucs-falcon-sitemgr for dates and booking.

- Contact falcon-support@uis.cam.ac.uk with queries

- The support site is at http://falcon-help.csx.cam.ac.uk/

- This course runs almost every month, with information at

  http://training.csx.cam.ac.uk/course/ucs-falcon There are regular 'clinic' sessions for those with sites, which run for half a day covering some items not previously mentioned and some topics in more depth – the content will be what the clinic attendees want covered.

- Falcon user group wiki, accessed at https://wiki.cam.ac.uk/websupport/Falcon-users-group

- A User's Guide to Plone 4 – available as a pdf/e-book from

  http://www.enfoldsystems.com/support/a-users-guide-to-plone.html

- Plone 4 documentation at http://plone.org/documentation – always check that what you are looking at applies to Plone 4 and not to earlier versions. We are now using Plone 4.3.

- There are various books available but most are from previous versions of Plone and will not apply to Falcon.