

# Hub Managers

The Managers' Guide is a user manual for managing the web content and functionality of a HUB. It progresses step-by-step through various common tasks and familiarizes the manager with the administrative back-end interface. Managers will learn how to accomplish tasks such as:

- Install new modules/widgets/plugins/templates
- Manage (add/edit/delete) site members
- Manage site settings
- Handle support tickets
- And more ...

# Introduction

## Overview

The Managers' Guide is a user manual for managing the web content and functionality of a HUB. It progresses step-by-step through various common tasks and familiarizes the manager with the administrative back-end interface. Managers will learn how to accomplish tasks such as:

- Manage (add/edit/delete) site members
- Manage site settings
- Handle support tickets
- And more ...

## How To Use The Guide

The guide is grouped by Subject, then Chapters within a subject, then Sections within Chapters.

# Administrator Area

## Logging In

The Administrator Interface ( or “back-end”) of the HUB is where you do most of the work to set up, configure and maintain your website. As such it must be protected from access by casual visitors and will request a valid username and password before access to the Administrator Interface is granted.

Access the Administrator Interface of the HUB by entering a special URL into the address bar of your web browser. If the HUB is located at <https://www.example.com> then you will enter the address <https://www.example.com/administrator> will be shown the Administrator Interface login.

Enter your username and password into the relevant fields. Click the "Login" button. If you login successfully, you will see the Administrator control panel.

## Logging Out

To log out of the Administrator Interface, locate the "Logout" link in the top-right corner of the Administrator Interface and click on it. Logging out will return you to the Administrator Interface login screen. If the "Logout" link is grayed out and nothing happens when you click on it, then you are probably in a screen where you have a page locked for your exclusive use. Please close out of the page by clicking “Save and Close” or “Close” to release the page, then click on the "Logout" link.

# Getting Started: Advanced Setup

## Your Hub's Getting Started Page

Your hub should have a getting started page at <your hub url>/gettingstarted. Most of the items addressed on this page are discussed in further detail below.

## Editing "About You", "How to Contact", & "Terms of Use" Pages

1. First login to the administrative interface of your hub.
2. Once logged in, find **Content** in the main menu bar located toward the top of the page.
3. Click on the **Article Manager** link.
4. You should now be presented with a list of all the content articles. There are a few methods to find the specific entry you want to edit. You can filter by state, category, author, etc. or search for the title of the article page. A third option would be to look through the list manually, if you really want.
5. Please find the **About Us** page as we will use that as an example. Once found, click the article title to edit it.
6. You now should be presented with a page where you can edit the text, title and other page parameters similar to the image below.
7. When your edits are complete, click the **Save & Close** toolbar button to save your changes and return you to the Article Manager screen.
8. Alternatively, you may click the **Save** toolbar button to save your article but leave it open for editing.

## Facebook Authentication

### Step 1: Setting Up Facebook

1. Navigate to (<https://developers.facebook.com>).
2. Begin by logging into a Facebook account or creating a new Facebook account for your Amazon Instance.
3. After successfully logging into Facebook, click the **My Apps** tab, then in the drop-down select **Register as a developer**.
4. Read through the Facebook policies and accept the policies by changing the answer from **No** to **Yes** with the switch button, and then click **Register**.
5. Select the **My Apps** tab again and from the drop-down click **Add a New App**.
6. Select the platform of the new app by clicking the **WWW** or "Website" icon.
7. In the upper right corner of the page, select the **Skip and Create App ID** button.
8. Fill in the **Display Name** in the name field and select the category of the application

depending on your field.

9. Fill in the rest of the **New App ID** information or leave it blank depending on your preference, then click **Create App ID**.
10. On the application dashboard, copy the App ID and App Secret. In order to copy the App Secret you will have to click **Show** in order to access the full secret code.

## Step 2: Enabling Facebook

1. Navigate to your Amazon Instance, and access the backend of the hub.
2. Click the **Extensions** tab and then from the drop-down select **Plug-in Manager**.
3. Locate the **Authentication-Facebook** plug-in and open the plug-in by clicking the plug-in name.
4. Inside the plug-in, change the status of the plug-in from **Disabled** to **Enabled**.
5. Insert the App ID and Consumer Secret into the corresponding fields and click **Save & Close**.
6. The Facebook Authentication will be available for users to use in order to login into the hub.

## LinkedIn Authentication

### Step 1: Setting Up LinkedIn

1. Navigate to (<https://www.linkedin.com/secure/developer>).
2. Begin by logging into a LinkedIn account or creating a new LinkedIn account for your Amazon Instance.
3. After successfully logging into LinkedIn, under the list of applications click **Add New Application**.
4. Fill out the form to register a new application.
5. Click **Add Application** once you have finished filling out all the required fields in the application form.
6. Once you receive a message stating, **Your application was successfully created**, copy the API key and the Secret key.

### Step 2: Enabling LinkedIn

1. Log into your Amazon Instance and log into the administrative side of the Amazon Instance.
2. Under the **Extensions** tab select from the drop-down **Plug-in Manager**.
3. Inside the Plug-in Manager, locate the **Authentication-LinkedIn** plug-in.
4. Select the title of the plug-in, then inside the plug-in fill in the API key and the Secret key.
5. Enable the plug-in by selecting from the Status drop-down, then click **Save & Close** to save the

changes that were made.

6. The LinkedIn plug-in will be successfully enabled and available for users to use as another option to login to your Amazon Instance.

## Google Authentication

### Step 1: Enable the Google+ API

1. Navigate to the Google Developers Console (<https://console.developers.google.com/project>) and log into a Google Account or create a new Google account for you Amazon Instance.
2. Select a project or create a new one by clicking **Create Project**:
3. In the Project name field, type in a name for your project.
  1. **Note:** Use a single project to hold all platform instances of your app (Android, iOS, web, etc.), each with a different Client ID.
    1. Click on the new project name in the list to start editing the project.
    2. Click the **Create** button and wait for the project to be created.
    3. In the **Project ID** field, optionally type in a project ID for your project or use the one that the console has created for you. This ID must be unique world-wide.
4. In the left sidebar, select the **APIs** item below "APIs & auth". A list of Google web services appears.
5. Find the **Google+ API** service and set its status to **ON**—notice that this action moves the service to the top of the list. You can turn off the Google Cloud services.
6. In the sidebar under "APIs & auth", select **Consent screen**.
  - a. Choose an **Email Address** and specify a **Product Name**.
7. In the left sidebar, select the **IDs** item below "APIs & auth".
8. Click **Create a new Client ID** — a dialog box appears.
9. In the **Application type** section of the dialog, select **Web application**.
10. In the **Authorized JavaScript origins** field, enter the origin for your app. You can enter multiple origins to allow for your app to run on different protocols, domains, or subdomains. Wildcards are not allowed. In the example below, the second URL could be a production URL.
11. Click the **Create Client ID** button.
12. Register the origins from which your app is allowed to access the Google APIs, as follows. An origin is a unique combination of protocol, hostname, and port.
13. In the resulting **Client ID for web application** section, copy the **Client ID** and **Client secret** that your app will need to use to access the APIs.

### Step 2: Enable the Authentication-Google Plug-in

1. Once you have collected your **Client ID** and **Client secret**, log into your Amazon Instance and navigate to the administrative side.
2. Select the **Extensions** tab and then from the drop down select the **Plug-in Manager** button.
3. Locate the **Authentication-Google** plug-in and select the plug-in's title.

4. Inside the plug-in, locate the **Status** section and select **Enable** from the drop-down.
5. Fill in the **Client ID** and **Client Secret** into the appropriate fields.
6. Save all the changes by clicking **Save & Close**.
7. Your Amazon Instance users will be able to log into your instance with Google authentication.

## Google Analytics

### Step 1: Set Up Google Analytics on Google

1. Navigate to ([google.com/analytics](https://google.com/analytics)) and select **Access Google Analytics**.
2. You will be required to login to a Google account. We suggest creating a Google Account for your hub if you have not already done so.
3. Click **Sign Up** and begin filling in the required fields in the analytics form.
4. Select **Get tracking ID**, and then read and accept the terms of Google Analytics by clicking **I accept**.
5. You will receive a tracking ID. This ID will be used on the hub in order to finish the set up process.

### Step 2: Enabling Google Analytics

1. Navigate back to your Amazon Instance and log into the backend or administrative side.
2. Click on the **Extensions** tab and then select from the drop-down the **Module Manager**.
3. On the **Module Manager** page click the New button and locate **Google Analytics** from the new module list.
4. Open the new module by clicking on its title then fill in the tracking ID, title, and the position of the module to be in the footer (typically, this module should be in a position present on every page--for HUBzero-built templates, that tends to be position "footer").
5. Click **Save & Close** and Google Analytics will be installed in your Amazon Instance.

## Google Drive

### Step 1: Configuring Google Drive in Projects on a

1. Navigate to [console.developers.google.com](https://console.developers.google.com) and login with your hub gmail account.
2. Click **Create Project** to create a new project for your hub.
  - a. Enter the Project Name. We suggest using your hub name.
  - b. Enter the Project ID. The Project ID is a globally unique identifier that cannot be renamed. Use the ID given, or specify a new one in the field.
  - c. Click **Create**.
3. Once created, click the link to your project to open it.
4. From the Dashboard, click "Enable an API" to select services for the project. From this

- list, find and turn on Drive API and Drive SDK services by clicking **Off** next to each to switch them to **On**. Be sure to accept Terms of Service if asked.
- Next, navigate to the left hand menu to find APIs & auth. Click **Consent Screen** to set up the branding information. Fill in all required fields.
    - Choose the hub email account from the Choose your email dropdown.
    - In Product name, type **Project Files to Google Drive Connector**.
    - Click **Save**.
  - Next, click **Credentials** under APIs & auth.
  - Click **Create new Client ID**.
  - On the Create Client ID screen, choose **Web Application** under Application Type.
  - In the Authorize Javascript origins field, type your hub URL (i.e. <https://yourhub.org>)
  - In the Authorized Redirect URIS field, type your hub URL and add /projects/auth (i.e. <https://www.yourhub.org/projects/auth>).
  - Click **Create Client ID**.
  - Under Client ID for web application, note the Client ID and Client Secret, as these will be needed.
  - Under Public API Access, click Create New Key.
  - Choose **Browser key** from the Create a new key pop-up.
  - In the HTTP Referrers field, type in your hub name followed by/\* . Example:  
yourhub.org/\*
  - Click Create. Note the API Key: After this step, you will navigate back to the hub to configure.

## Step 2: Turning on Google Drive in Projects

- Navigate to [yourhub.org/administrator](https://yourhub.org/administrator) and log in.
- Navigate to the **Extensions** menu, and click **Plug-in Manager**.
- In the search, type **Projects**, and click **Search**.
- In the results, find the Projects – Files plugin. Click the title to edit.
- Scroll down until you see the Google Connection Enabled option. Choose **yes** from the drop-down.
- Fill in the Google Client ID, Client Secret, and API Key fields with the information from your account.
- Choose when to auto-sync.
- If you would like to only make Google Drive available to certain projects, type the alias of the project into the Connected Projects.
- Click **Save & Close**.

### CKEditor

CKEditor is a HTML text editor designed to simplify web content creation. It's a WYSIWYG editor that brings common word processing features directly into the web pages being built. After a Hub has been updated to R1.3.0 various settings need to be adjusted on the administrator backend of the Hub to allow CKEditor for all users.

## Step 1: Global Configuration

1. On the backend of the Amazon Instance, select the "Site" tab from the top menu.
2. Click on the "Global Configuration" from the drop-down to open up the global configuration settings.
3. Under the "Site" tab navigate to "Site Settings" and then locate "Default Editor".
4. Select "Editor-CKEditor" from the drop-down.
5. Click "Save & Close" to save the newly changed settings.

## Step 2: HTML Format Handler Plug-in

1. On the backend of the Amazon Instance, select the "Extensions" tab from the top menu.
2. Click on the "Plug-in Manager" from the drop-down.
3. Enter "Content – HTML Format Handler" into the search box and click "Search".
4. Click on the "Content – HTML Format Handler" title to open up the plug-in.
5. In "Details" change the status to "Enabled" and then click "Save & Close".

### ReCAPTCHA

## Step 1: Set Up ReCAPTCHA on Google

1. Navigate to (<https://www.google.com/recaptcha/intro/index.html>) and select **Get reCAPTCHA**.
2. You will be required to login to a Google account, at this point consider creating a new account for you Amazon Instance or use a previously created account.
3. Fill in the **Label** field and **Domain** field with the appropriate information.
4. Copy the **Site key** and **Secret key**.

# Step 2: Enabling ReCAPTCHA

1. Navigate to your Amazon Instance and log into the administrative side.
2. Select the **Extensions** tab and from the drop-down select **Plug-in Manager**.
3. Locate the **CAPTCHA-ReCAPTCHA** plug-in and click on the title.
4. Change the status of the plug-in from **Disabled** to **Enabled**, then fill in the **Public key** and the **Secret key**.
5. Save the changes by clicking **Save & Close**, then ReCAPTCHA will be activated on your Amazon Instance.

### Frequently Asked Questions

#### Article Pages: How do you set parameters for articles and other content items?

Many Article parameters, such as “Show Title”, “Show Author”, and so on, can be set from the backend of the Hub. This can be done by logging in to the backend, navigating to the “Article Manager: Articles” page (Content-> Article Manager), and then selecting the article you would like to adjust the parameter for. By clicking the box beside the title of the article, and then clicking the “Edit” button to open up the article for editing.

Typically, parameters at the individual article and menu item levels can be set to a specific value or to a value of "Use Global". If the individual article's parameter is set, then that value controls the setting. If this is set to "Use Global" then the menu item parameter is checked.

#### Courses: How can I view the outline a student would see in a course?

If you wish to view and check any prerequisites that have been set as an instructor you have to enroll in the course as a student. Currently the instructor's view of the course outline and the outline students see are not the same. An instructor or a manager of a course will be able to view all of the content and see that it is published or unpublished. For students, the outline they view depends on the prerequisites for the parts of the course and what is available to them during the course.

The best way for an administrator of a course to view what a student can see, would be to create a testing account and enroll as a student in the course.

#### Groups: How do you send a group message?

Group messaging allows you to send out a message as an email to all the group members. A Group Manager is the only one with the permissions to send out messages from the group to all group members. To send out group messages follow these steps:

1. Navigate to **<https://yourhub.org/groups>** and log into the Hub.
2. Navigate to the group page and click on the **Members** tab.
3. Click on the email icon to send a message to all of the group members.
  - a. To email only a specific group member, select the same icon next to the individual's name.
4. Compose the message by:
  - a. Selecting whom the message is for from the drop-down.

- b. Fill in the subject title.
  - c. Write up the message.
5. Click the **Send** button to send the message to the group.

### Projects: How do you connect Google Drive in a Project?

**Note:** Managers and Collaborators of a Project can connect their Google Drives, but the creator of the Project must connect their Google Drive account prior to others adding on their accounts to the project.

1. Navigate to <https://yourhub.org/projects> and log into the Hub.
2. Access the project that you wish to add your Google Drive to.
3. Inside of the project access the **Files** tab and locate the **Connect** button.
4. Click the **Connect** button and then click the second **Connect** button.
5. Then choose the account or login to your Google account.
6. You will be relocated to a new page where you will accept the project files to Google Drive for various access levels. Click **Accept** to confirm the last step.
7. Then you will be relocated back to the project confirming your Google Drive connection to the project.

### Support: How do I add other attachment file extensions for tickets?

1. Navigate to <https://yourhub.org/administrator> and login to the as an administrative user.
2. Click on the **Components** tab and then click on **Support**.
3. On the **Support: Tickets** page, click on the **Options** button.
4. Inside of **Support Configuration** click on the **Files** tab.
5. Under **Extensions**, add the new file extension that can be uploaded to a ticket.
6. Click **Save & Close** to save the changes and to exit out of the **Support Configuration** pop-up.

### Wishlist: How do I change the status of a wish?

## HUB MANAGERS

---

The status of a wish serves to indicate to the general site users whether the wish was accepted/rejected for implementation and when to expect the proposed feature online. Once a wish is submitted, an administrator of the Hub can change the status of the wish. To change the status simply open up the wish and then click **Change status** which is located under the wish. From the drop-down box select the new status of the wish:

- **Pending:** The wish is pending a response.
- **Accepted:** The wish had been accepted and is currently being worked on.
- **Rejected:** The wish has been rejected due to other contributing factors that disallow the ability to create the wish. Example: Practicality or User use case
- **Granted:** The wish has come true and is now available to the Hub.

Once the status has been selected, click **Change Status** to save the new status and inform the user who submitted the wish what stage their wish is in right now.

# Registration

## Overview

HUBs allow for considerable customization of the registration form for new members. While one HUB may present fields for filling in phone, website, and organization, another may take a more minimal approach and require only a username, password, and email address. This is all configurable.

## Making Changes

1. First login to the administrative back-end.
2. Once logged in, find “Components” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose “Register” from the available options.

4. You should now be presented with a table of available user fields and their status for a particular action. This controls what fields the user will see, must fill in (required) or can fill in (optional) depending upon which action or state they are currently in. That is, you can make the username field required for the registration page (“create” column) but may not wish for your users to be able to edit this after creation (“read only” for the “update” and “edit” columns).

### Create column

What the user sees on the registration page

### Proxy column

What columns an administrator sees or must fill in when creating an account by proxy (i.e., for someone else)

### Update column

What fields the user will see and/or must fill in if something has changed with what information is required at registration. An example of this would be if the “citizenship” field was, at one point, optional for registration but is now required. Setting this field to “Required” for the “Update” column will now require logged-in users to fill this information out.

### Edit column

What fields the user will see and can edit for their user profile

### Field Option Definitions:

Required = Must fill in

Optional = Can fill in

Hide = Not visible

Read only = Can view but cannot change

5. Once you feel ready to save your changes, scroll back to the top of the page and click "Save" (the icon that looks like a floppy disk) in the upper right portion of the page.

Changes take affect immediately.

## Customizing Confirmation Email

All component layouts can be customized through overrides. Except for files that are provided in the "Joomla!" distribution itself, this method for customization eliminate the need for designers and developers to "hack" core files that could change when the site is updated to a new version. Because they are contained within the template, they can be deployed to the Web site without having to worry about changes being accidentally overwritten when your System Administrator upgrades the site. Some emails sent by the system, such as registration confirmations, are component layouts for just this reason of customization.

### Quick Overview of Output Overrides

Layout overrides only work within the active template and are located under the `/html/` directory in the template. For example, the overrides for "corenil" are located under `/templates/corenil/html/`.

It is important to understand that if you create overrides in one template, they will not be available in other templates. For example, "rhuk\_milkyway" has no component layout overrides at all. When you use this template you are seeing the raw output from all components. When you use the "Beez" template, almost every piece of component output is being controlled by the layout overrides in the template. "corenil" is in between having overrides for some components and only some views of those components.

The layout overrides must be placed in particular way. Using "Beez" as an example you will see the following structure:

```
/templates
  /hubbasic
```

## HUB MANAGERS

---

```
    /html
      /com_register (this directory matches the component directory name)
      /emails       (this directory matches the view directory name)
      confirm.php  (this file matches the layout file name)
```

The structure for component overrides is quite simple:

```
/html/com_{ComponentName}/{ViewName}/{LayoutName}.php.
```

### Customizing The Confirmation Email

To override the component layout for the registration confirmation email, copy:

```
/components/com_register/views/emails/tmpl/confirm.php (the email sent if the user resends a confirmation)
/components/com_register/views/emails/tmpl/create.php  (the email sent upon registration)
```

to:

```
/templates/{YourTemplate}/html/com_register/emails/confirm.php
/templates/{YourTemplate}/html/com_register/emails/create.php
```

If the destination directories do not exist, create them. And then edit the contents of the file(s) you just copied.

See [Template Overrides](#) for more information on customizing layouts and CSS.

### Confirmation Return URL

By default, members who have just completed the confirmation process will be directed to a "Thank you" page. It is possible, in HUBzero, to change the redirection URL to something else.

**Note:** This only applies to the initial page the user sees upon confirmation of their email. To customize the return URL members are redirected to upon login see [Hub Configuration](#).

1. First login to the administrative back-end.
2. Once logged in, find “Components” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose “Register” from the available options.

4. Once the page has loaded, select the “Parameters” button in the toolbar, found in the upper right-hand portion of the screen. Click it.

5. You should now be presented with a pop-up panel for various settings and configurations of your site.

Look for the option titled "Confirmation Return URL". This will most likely be the second item in the list.

6. Enter in the textbox the URL you wish members to be redirected to and then click "Save".



# Components

## Overview

Many components will have a set of parameters that can be configured. These parameters can determine what functionality is presented to the user, be a default set of user options (what profile fields are visible to site visitors by default, for instance), or settings needed for the component to function properly. Accessing and adjusting these parameters is quick and easy.

**Note:** Not all components will have configurable parameters. For those that do, the configurations apply **only** to that component and should not affect any other components, site settings, or module settings.

1. First login to the administrative back-end.
2. Once logged in, find “Components” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose the component you wish configure from the available options. Here we've chosen the "Hub" component.

4. Once the page has loaded, select the “Parameters” button in the toolbar, found in the upper right-hand portion of the screen. Click it.
5. You should now be presented with a pop-up panel for various settings and configurations of your site.
6. Adjust the available parameters as needed and then click "Save". Changes take affect immediately.

## HUB MANAGERS

---

**Note:** Very often a component will not function properly until component parameters have been first inputted and saved. For instance, HUBzero tools will not work properly unless the middleware configuration has first been defined in the tools component entry.

# Modules

## Overview

Most modules will have a set of parameters that can be configured. These parameters can determine what functionality is presented to the user, be a default set of user options, or settings needed for the module to function properly (setting the URL to a feed for a feed reader module, for instance). Accessing and adjusting these parameters is quick and easy.

**Note:** Not all modules will have configurable parameters. For those that do, the configurations apply **only** to that module instance. You may have multiple instances of a module with different parameter configurations.

1. First login to the administrative back-end.
2. Once logged in, go to the "Module Manager." The Module Manager can be found by selecting "Extensions" > "Module Manager" from the drop-down menu on the back-end of your HUB installation.

3. Choose the module you wish to configure from the available list.
4. Once the page has loaded, find the "Parameters" grouping, found on the right-hand portion of the screen.
5. Adjust the available parameters as needed and then click "Save" (the icon that looks like a star) in the upper right portion of the page. Changes take affect immediately.



# Plugins

## Overview

Some plugins will have a set of parameters that can be configured. These parameters can determine what functionality is presented to the user, be a default set of user options, or settings needed for the plugin to function properly. Accessing and adjusting these parameters is quick and easy.

**Note:** Not all plugins will have configurable parameters. For those that do, the configurations apply **only** to that plugin and should not affect component configuration, module configuration, or site configuration.

1. First login to the administrative back-end.
2. Once logged in, go to the "Plugin Manager." The Plugin Manager can be found by selecting "Extensions" > "Plugin Manager" from the drop-down menu on the back-end of your HUB installation.

3. Choose the plugin you wish configure from the available list.
4. Once the page has loaded, find the "Parameters" grouping, found on the right-hand portion of the screen.
5. Adjust the available parameters as needed and then click "Save" (the icon that looks like a floppy disk) in the upper right portion of the page. Changes take affect immediately.



# Users

## Overview

By default casual visitors are allowed to register themselves on your website to gain access to additional resources. For example, registered users might be allowed to submit resources or simulation tools. Your website implements a user registration policy which can be adapted to suit your particular requirements so you decide what additional resources are made available. You can disable user registration altogether if you prefer.

Users register themselves on your website using the "Register" link typically found in the upper right-hand portion of every page (position may vary). Once registered, users will log in to your website by entering their username and password using the login form found at <http://yourhub.org/login>. There are also links on the form to manage users who forget their usernames or passwords.

See [Configuring Registration](#) to learn more about changing registration settings.

### User Manager vs Members Component

#### User Manager

A legacy go the Joomla! framework that powered previous HUBzero versions, the CMS comes with a User Manager accessed via the back-end from the "Users" drop-down of the main menu.

#### Members Component

HUBzero extended the standard Joomla! user profile with options for more demographic information (race, sex, etc.) and various other key pieces of information needed for such things as simulation tools. All this information can be accessed under "Members" in the "Users" list found in the main menu of the back-end administration.

#### When to use which

All user will have an entry in **both** the User Manager and the Members Component. Any information edited with one, such as changing a user's name via the User Manager, will also be automatically reflected in the other. Since the majority of fields in the User Manager are also represented in the Members Component plus considerably more fields, it is recommended that all user editing be done in the Members Component. The one exception concerns adjusting a user's access level (regular user vs. administrator, etc.). This is still done only with the User Manager.

**Note:** The, admittedly, confusing separation of Users and Members should be resolved in a future version; Functionality from the two components will be merged, providing a single interface for access user information.

### Managing Members: User Permissions

Users who work closely with the administration of the Hub need to be given access prior to having these permissions. In order for users to gain these permissions, another Administrator of the Hub can give other members the same permissions. To give a user Administrator access, follow these steps:

1. Navigate to the administrative interface of the Hub, also known as the Backend
2. Once there, locate the Users tab and click it to open up a drop-down list
3. Click from the drop-down the User Manager button
4. On the "User Manager: Users" page, click on the name of the user that you wish to give Administrator access to
5. Inside the user's account information page, locate the "Assigned Access Groups" box and click the check box of "Administrator" or the desired group field you want the user to have permissions to
6. After this step, click on the button "Save & Close" to save the changes you made

# Creating by Proxy

## Proxy-creating users

**Note:** This feature has moved from <https://yourhub.org/register/proxycreate> to the administrator backend.

To create an account for another user:

1. In the backend, go to the Members component under the Users menu.
2. Click on the **+** button to add a new member.
3. Fill in the information about the new user.
4. Click **Save & Close** and if successful, you will be taken to the user's member backend information page.
5. At this point, if the hub's setting (found in a plug-in called **User - Joomla!** under Extensions>> Plug-in Manager) is set to send email out to newly-created users, the user will be sent an email about the account and credentials (example below). If email notification is off, the system will not send an email to the proxy-created user, and it will be up to you to let them know about their credentials.

```
From: Your Hub <support@yourhub.org>  
Date: Thu, Nov 13, 2014 at 5:01 PM  
Subject: New User Details
```

Hello [NAME HERE],

You have been added as a User to [YOUR HUB] by an Administrator.

This email contains your username and password to log in to <https://yourhub.org/>

```
Username: [USERNAME HERE]  
Password: [PASSWORD HERE]
```

Please do not respond to this message as it is automatically generated and is for information purposes only.

# Editing

## Overview

**Note:** Editing of users is done through the HUBzero Members Manager component, **not** the User manager. Any changes made via the Members Manager will also be reflected in the User tables. Making changes with the User Manager can lead to data becoming out of sync.

1. First login to the administrative back-end.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of all installed components.
3. Choose **Members** from the available options.
4. You should now be presented with a list of all the members on your site. There are a variety of methods to find the specific person you wish to edit: you can search by such fields as name, email, and ID number. You may also scroll to the bottom of the page and navigate your way through the entire list. Once found, click the person's name to edit their information.
5. You may then edit their name, organization, employment status, etc.
6. Once you feel ready to save your changes, scroll back to the top of the page and click **Save** (the icon that looks like a floppy disk) in the upper right portion of the page.

## Adjusting Access Level

The CMS offers various levels of access and privileges for users. All new accounts, by default, will be *Registered Users*, the access level with the least amount of privileges. Sometimes, you will need to grant a (trusted) user administrative access so they can manage content and portions of your hub. We strongly advise that administrative privileges be handed out rarely and with caution.

To adjust a user's access level:

1. First login to the administrative back-end.
2. Once logged in, go to the **User Manager**. The User Manager can be found by selecting **Site > User Manager** from the drop-down menu on the back-end of your HUB

installation.

3. Choose the user you wish to edit from the available list.
4. Once the page has loaded, find the **Group** option, found on the left-hand portion of the screen under the **User Details** grouping.

The available access levels are as follows:

- **Registered User**: Normal visitors who register at the site. Can view Menu Items that have Access Level of Registered. Cannot edit or submit articles.
  - **Author**: Can submit new articles for approval in the front end only. A Publisher or higher must approve. Cannot edit existing articles.
  - **Editor**: Can submit new articles or edit existing articles from the front end only. A Publisher or higher must approve.
  - **Publisher**: Can submit, edit, or publish articles from the front end only.
  - **Manager/Administrator/Super Administrator**: Can do all of the above plus can log into the back end with increasing rights.
5. Select the access level desired for the user and then click **Save** (the icon that looks like a floppy disk) in the upper right portion of the page. Changes take affect immediately.

# Deleting

## Overview

In order to delete a user from your database, log in to the administration panel and choose **Site -> User Manager** from the top menu. On the opening page, select the checkbox to the left of the user's name you would like to remove and press the **Delete** button in the upper-right corner.

# Looking Up

## Overview

There will be times you need to track down a user's information for whatever reason. This can be a time-consuming task when presented with paging through potentially thousands of accounts. Luckily, there are multiple ways you can search and narrow down results quickly.

## User Manager

Since information such as user ID, name, username, and email is kept consistent between the User Manager and Members Component, you can use either one to search for a specific account.

To search via the User Manager:

1. First login to the administrative back-end.
2. Once logged in, go to the **User Manager**. The User Manager can be found by selecting **Site > User Manager** from the drop-down menu on the back-end of your HUB installation.
3. You will be presented with a list of all users registered on your site.
4. Above the list of users are a few options for filtering results.

On the left side is a search box. You can search for users by name, username, or email address.

On the right side are a few select boxes that allow you to filter the users based on their access level (editor, administrator, etc.)—here, it's called **Group**—or log status (logged in/out).

5. Choose your method for filtering and the list of users will be narrowed down to match those criteria. Once found, click the person's name to view/edit their information.

**Note:** If you need to find an account to access more information than name, username, and email, it is recommended to search via the Members component.

### Members Component

#### From the Administrative Back-end

Since information such as user ID, name, username, and email is kept consistent between the User Manager and Members Component, you can use either one to search for a specific account. The Members Component, however, will allow access to more details about a user's account. The extended demographic information provided by the Members Component, for example, cannot be accessed via the User Manager.

To search via the Members Component:

1. First login to the administrative back-end.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of all installed components.
3. Choose **Members** from the available options.
4. You should now be presented with a list of all the members on your site. There are a variety of methods to find the specific person you wish to edit: you can search by such fields as name, email, and ID number.
5. On the left side, above the list of members, is a search field for filtering the list. You can search by such fields as name, email, and ID number.
6. Choose your method for filtering and the list of users will be narrowed down to match those criteria. Once found, click the person's name to view/edit their information.

# Default Settings

## Private/Public Profiles

By default, new profiles are set to **private**. This means that only super administrators and the member him/herself may see and access that profile's information. Private profiles do not display in search results.

## Public Profiles by Default

Member profiles may be set to public by default via the administrative Members component. To do so, log in to the administrative back-end and find **Members** in the **Components** list of the main menu. Once the Members manager page has loaded, locate the **Parameters** button in the toolbar (top right, opposite of the **Members** heading). Click this. You should be presented with a series of settings. Find **Default Privacy** and set to **Public**. All new accounts will now default to public profiles.

**Note:** any accounts created before changing this setting will retain whatever configuration they had. For instance, private profiles will remain private unless manually changed by the user.

# Members

## Publishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be published. This would turn on the plugin allowing users to access it from their profile page.
4. Click **Publish** and the plugin will be turned on.

## Unpublishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be unpublished from the Hub. This would turn off the plugin taking it off their profile page.
4. Click **Unpublished** and the plugin will be turned off.

## Clearing Existing Terms of Use Agreements

When terms of use are changed on the hub, it may be necessary to require users to re-accept the new terms. To reset all existing agreements, and force re-acceptance, go to the administrative interface and navigate to the members component. Click the "Reset terms of use agreements for all users" button, and confirm the action.

# Password Rules

## Creating a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Click **New** to create a new password rule.
4. Choose the rule that you are going to add more regulations to.
5. Insert the descriptions that define the rule.
6. Insert the failure message if the user fails to meet the correct regulations.
7. Click **Save & Close** to save the

## Deleting a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Check the rule's box and then click **Delete** to delete the rule.
4. The rule will automatically be removed from the Hub.

## Editing a Password Rule

1. Log in to the backend of the Hub and access the **Users** tab and navigate to **Members**.
2. Locate the **Password Rules** tab in **Members**.
3. Check the rule's box and then click **Edit** to begin editing the rule.
4. Click **Save & Close** to save the newly edited material.

# Plugins

## Publishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be published. This would turn on the plugin allowing users to access it from their profile page.
4. Click **Publish** and the plugin will be turned on.

## Unpublishing a Member Plugin

1. Log in to the backend of the Hub and access the **Users** tab and then click **Members**.
2. On the **Members** main page, navigate to the **Plugins** tab.
3. Select the box beside the plugin that is to be unpublished from the Hub. This would turn off the plugin taking it off their profile page.
4. Click **Unpublished** and the plugin will be turned off.

# Registration

## Registration Fields

1. First log in to the administrative backend.
2. Once logged in, find **Components** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose **Registration** from the available options.
4. You should now be presented with a table of available user fields and their status for a particular action. This controls what fields the user will see, must fill in (required) or can fill in (optional) depending upon which action or state they are currently in. That is, you can make the username field required for the registration page ("create" column) but may not wish for your users to be able to edit this after creation ("read only" for the "update" and "edit" columns).
  - **Create column:** What the user sees on the registration page
  - **Proxy column :** What columns an administrator sees or must fill in when creating an account by proxy (i.e., for someone else)
  - **Update column:** What fields the user will see and/or must fill in if something has changed with what information is required at registration. An example of this would be if the "citizenship" field was, at one point, optional for registration but is now required. Setting this field to "Required" for the "Update" column will now require logged-in users to fill this information out.
  - **Edit column:** What fields the user will see and can edit for their user profile
  - **Field Option Definitions:** Required = Must fill in Optional = Can fill in Hide = Not visible Read only = Can view but cannot change
5. Once you feel ready to save your changes, scroll back to the top of the page and click **Save** in the upper right portion of the page. Changes take affect immediately.

## Customizing Confirmation Email

All component layouts can be customized through overrides. Except for files that are provided in the Joomla! distribution itself, this method for customization eliminate the need for designers and developers to "hack" core files that could change when the site is updated to a new version. Because they are contained within the template, they can be deployed to the Web site without having to worry about changes being accidentally

## User Authentication Plugins

A Hub can offer multiple ways for users to login through other services like LinkedIn, Facebook,

ORCID, etc.

- Authentication-Certificate: Handles user authentication against client side SSL certificates
- Authentication-Facebook: Handles user authentication against Facebook
- Authentication-Google: Handles user authentication against Google
- Authentication-Hubzero: Default user authentication
- Authentication-LinkedIn: Handles user authentication against LinkedIn
- Authentication-ORCID: Handles user authentication against ORCID
- Authentication-Picas: Handles user authentication against Purdue's CAS
- Authentication-Twitter: Handles user authentication against Twitter

To activate these authentication plugins acquire a customer secret and customer key from the other service by registering your App on the service and selecting the Web format. Once you have the keys you can enable the plugins from the backend of the Hub.

1. Navigate to the backend of the Hub and locate the **Extensions Tab** and click on **Plug-in Manager**.
2. Inside of the **Plug-in Manager**, search for the authentication plugin.
3. Click on the title of the plugin and inside the plugin insert the **customer secret** and **customer key**.
4. Change the *Status* of the plugin to **Enabled** and then click **Save & Close**.

## TLS Certificate Authentication

Certificate Authentication Plugin:

This plugin is in charge of actually checking the certificate and creating new requests and linking them to the system. This plugin is signed. Authentication - Certificate. One already has an application for the

Enable the Authentication - Certificate Plugin:

1. Navigate to the backend of the Hub and locate the **Extensions** tab.
2. Click on the **Extensions** tab and from the drop-down click on the **Plug-in Manager**.
3. Locate from the plugin list or through search the **Authentication - Certificate** plugin.
4. Click on the title of the plugin then locate the *Status* section inside the plugin.
5. From the *Status* drop-down, select **Enabled** then click **Save & Close**.

Certificate routing plugin:

## HUB MANAGERS

---

This plugin handles the requirement for a certificate to be present while browsing the site. While the authentication plugin is what checks and links the user to the cert, other authentication could still be allowed. With this plugin enabled, a certificate must be present and authentication options are limited to just certificate based authentication. This plugin is called: System - Certificate.

Enable the System - Certificate plugin by following the same steps listed out above.

### New account approval:

This allows admins to require approval of new accounts prior to their being able to access the site. When this is enabled, accounts pending approval can be found in the users manager on the backend. You can also elect to turn on an administrative dashboard module that lists accounts pending approval. And in the users manager parameters, you can enable administrator notifications to receive an email when new accounts are created. This allows the certificate->user link to be user initiated (rather than admin initiated), but still gated and admin approved.

In terms of apache configuration, "SSLVerifyClient optional" should be set. This will allow the certificate to be included, but also allow the CMS to handle the requirement for the certificate through the use of the certificate routing plugin mentioned above. "SSLOptions +StdEnvVars" should also be set, as I'm sure it already is for you all. Lastly, make sure the site is forced to SSL via the Joomla global configuration on the backend.

**Note:** In order for this feature to be useful, all users need to gain a TLS Certificate and have it implemented in their browser prior to utilizing this authentication process.

Failed to write content for page "Member Import"

# Menus

## Organizing Your Articles Using Menus

If you have a set of articles that you would like to group together, you can use menus to organize those articles in an easy-to-navigate fashion.

An example of this can be found on the default hub under the About section (see also below).

1. To begin, find the URLs of the articles that you're interested in grouping together
  1. **Note:** If you can't find, or don't know the URL, it comes from the article alias, the section and the category (see below and view these documentation pages: [Categories](#), [URLs](#)).
2. With your article pages created, you'll need to make the menu structure
3. Navigate to **Menus -> Menu Manager** on the *Joomla!* backend and select **New**.
4. Give your new menu a unique name and title, then click **Save**
5. Now you will see your new menu in the list.
6. Click the icon indicated below to start adding menu items to your new menu.
  1. **Note:** It is important to realize, for clarity's sake, that there is a difference between "Menu" and "Menu Item". "Menu Item" represents an instance, or individual menu link, while "Menu" represents the entity as a whole.
7. Now click the **New** button to add new menu items to your menu.
8. After clicking **New**, scroll down and select **External Link**.
9. Next, fill in the necessary information:
  - This is where you'll need to remember the URLs for the articles that you've created (you'll add the URL to the "Link" field)
  - After creating this menu item, you'll be able to access this article page via the URL for the article, or the Alias of the menu item
    - **For example:** according the screenshot below, both <http://yourhub.org/example/examplearticle1> & <http://yourhub.org/article1> will work when trying to access this page via the browser (See [URL Redirects](#) for more details). For the navigational menus to display properly, though, you'll want to use the menu item alias when trying to access your article page.
10. Click **Save** in the upper right-hand corner.
11. If you switch over to the front-end and navigate to your article page (via the menu item URL), you should see a page similar to this one:
12. At this point, simply repeat the previous steps to create menu items for all of the articles that you want to use together
13. The final step in this process is to assign the menu items that you've created to display on the article pages.
14. To do this, navigate to **Extensions -> Module Manager** on the backend *Joomla!* interface
15. Next, select **New**.
16. Scroll down and select **Menu** from the list (either click on the link, or select the radio

button then scroll back up and click "Next").

Now fill in the correct information...make sure to:??

- Give it a **Title**
- Be sure **Enabled** is set to **Yes**
- Give it the position **Left**
- Set it to display on the correct pages
  - Under menu assignment, **control click** the menu items that we made in the preceding steps. This is what tells *Joomla!* which pages to display our new menu on.
- Under **Module Parameters**, **Menu Name** should be the title of the menu that we created earlier (**example** in this case)
- **Menu Style** should be **List?**

17. When all of this has been done, click **Save**.

## Redirecting a URL to Another Existing Hub Component

Previously created groups and other components can have URL redirects added to other components instead of transferring all the files and data that live in the previous area to a new section. For example, a professor can redirect a group called "Mainclass" to another group called "Springclass". In order to set up a redirect, follow these steps:

1. On the backend, locate the tab **Menus** and select **Menu Manager** from the drop-down
2. >Locate the **Default** menu group
3. Click on the **Default** group to enter its menu interface
4. Try and locate the **Parent** group. In this case we want **groups**, however this is not listed, so let's create it by clicking the **New** in the top right corner
5. Create the "**groups**" part of the URL <www.hubname.org>/groups/mainclass
  1. Click the **Select** button next to the field **Menu Item Type**
  2. Select **External URL**
  3. To create the **groups** part of the URL, fill in the form as follows:
    1. ?Menu Item Type: External URL

2. Menu Title: Groups
3. Link: groups
4. Click **Save and Close** from the top right corner
6. To create the redirect portion, follow step 5 again *except* fill out the **Menu Title** as **mainclass** and the link as **spring2016class**
  1. This will redirect users from /groups/mainclass to /groups/spring2016class
7. Nest “mainclass” under “groups” to create the end result the redirect
  1. This is done in the **Menu Item Details** under **Parent**
8. Set the Parent to **Groups**
9. Click **Save and Close**

# Content

## Overview

Let's start with some definitions. An Article is some written information that you want to display on your site. It normally contains some text and can contain pictures and other types of content.

It is important to understand that the content of the site (article pages, modules, groups, etc.) is totally separate from the visual formatting (template) of the site. It is best to think of text entered in the Administrator Interface as pure content and there is no need to style each individual component.

# Article Manager

## Creating an Article

1. First login to the administrative Interface.
2. Once logged in, find **Content** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as **Article Manager**, **Category Manager**, and **Media Manager**.
3. Click on **Article Manager**.
4. Click the **+** sign to add a new article page. The New Article screen contains options for categorizing and naming the article, editing content and selecting parameters.
5. Enter a title in the **Title** field. This is used when the article title is displayed.
6. Enter an alias in the **Alias** field. This is the alias that will appear in the URL. For example, choosing hubzero as the alias will result in **https://yourhub.org/hubzero**.
7. Select a **Category** using the appropriate drop down menu.
  - If no category applies, choose **Uncategorized**.
8. Select the status of the article. If you would like to see it on the frontend immediately, choose **Published**.
9. Select Access level.
  - **Public**: All hub visitors can access the article page.
  - **Registered**: Users must be registered and logged in to see the page.
10. In the **Article Text** field, enter the content of the article.
11. Click the **Save and Close** (star) toolbar button to save your changes and return you to the Article Manager screen.
  - Alternatively, you may click the **Save** (check in a circle) toolbar button to save your article but leave it open for editing.
12. To find view your article on the frontend, navigate to [yourhub.org/alias](https://yourhub.org/alias). If you chose a category, this alias might be slightly different. See URL documentation under Content for more information.

## Editing an Article

1. First login to the administrative Interface.
2. Once logged in, find **Content** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as **Article Manager**, **Category Manager**, and **Media Manager**.
3. Click on the **Article Manager** link.
4. You should now be presented with a list of all the content articles. There are a few methods to find the specific entry you want to edit. You can filter by state, category, author, etc. or search for the title of the article page. A third option would be to look through the list manually, if you really want.
5. Please find the **About Us** page as we will use that as an example. Once found, click

the article title to edit it.

6. You now should be presented with a page where you can edit the text, title and other page parameters similar to the image below.
7. When your edits are complete, click the **Save and Close** (star) toolbar button to save your changes and return you to the Article Manager screen.
8. Alternatively, you may click the **Save** (check in a circle) toolbar button to save your article but leave it open for editing.

## Deleting an Article

Moving to the Trash:

1. First login to the administrative Interface.
2. Once logged in, find **Content** in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as **Article Manager**, **Category Manager**, and **Media Manager**.
3. Click on the **Article Manager** link.
4. Check the box next to the article you want to trash.
5. Then click **Trash** (trashcan) toolbar button. This will move the article to a trash bin so that it can be retrieved later if needed. It does not permanently delete the article.

To retrieve the trashed article, select the status filter of the article list to **trashed**. This will show all the articles with a status of **trashed**. Click on the article's title and choose the status that you require – typically **published**.

Permanently Deleting:

1. If you want to make sure the Article is completely gone from the system (so no further roll back is available), select the status filter of the article list to **trashed**. This will show all the articles with a status of **trashed**.
2. Check the box next to the article you want to delete.
3. Click the **Empty Trash** (trashcan) toolbar button to remove the article permanently. Recovery is not possible after this action.
  - **Note:** Articles in the Trash Manager are not the same as Archived Articles..
4. Check the box next to the article you want to unarchive.

## URLs

### Understanding URLs for Sections, Categories, and Articles

When SEF URLs are being used, it can become tricky at times to discover which article a URL path leads to. HUBs try to simplify some of this and make the association(s) of the path to sections, categories, and articles a little more obvious.

For the purposes of this explanation, we assume every section, category, and article has an alias. In its simplest form, a URL will map to a path of `http://yourhub.org/{SectionAlias}/{CategoryAlias}/{ArticleAlias}`. So, a URL of `http://yourhub.org/about/this/site` would map to a section with an alias of "about", a category with an alias of "this", and an article with an alias of "site".

The resulting URL will start to collapse, or shorten, when sections, categories, and articles have the same alias. For instance, if you have a section with alias "about", a category with an alias of "this", and an article with an alias of "this"—notice it is the same as the category—the resulting URL will be `http://yourhub.org/about/this`.

If all three portions have the same alias, the `http://yourhub.org/about/this/site` shortens further. A section alias of "about", category alias of "about" and article alias of "about" will simply produce `http://yourhub.org/about`.

Quick Reference	Section	Category	Article	URL
	about	this	site	<code>http://yourhub.org/about/this/site</code>
	about	this	this	<code>http://yourhub.org/about/this</code>
	this	this	site	<code>http://yourhub.org/this/site</code>
	about	this	about	<code>http://yourhub.org/about/this/about</code>
	about	about	about	<code>http://yourhub.org/about</code>

### URL Redirects

If you find yourself wanting to redirect a certain URL to another page, then *Joomla!* has a solution for you. And fortunately, the solution is as simple as creating a menu.

1. Navigate to **Menus -> Menu Manager** on the Joomla! backend
2. At this point, you can either create a new Menu or use an existing one. If you prefer the former, click **New** in the upper right-hand corner, and give your new Menu a name such

as **Redirects**. Alternatively, you could use the **Default** menu. The only thing to remember is that you should use a menu that is not displayed on the site (e.g. the **Main Menu** and **About** menus or displayed on the standard hub)

3. Irrelevant of which option you chose, select the icon in the **Menu Item(s)** row to add a new **Menu Item** to your **Menu** to handle the redirect
4. Next, fill in the necessary fields
  - Add a **Title**
  - The **Alias** will be the address that a user would enter into the address bar of their browser
  - The **Link** will be the page where the actual content exists
    - **Example:** According to the image below, if a user types <http://myhub.org/example>, though that page does not exist, they will get the content found at <http://myhub.org/example/examplearticle1>
5. Select **Save**.

# Answers

## What is the Answers component?

Answers, or Questions and Answers in the front end, is a place to exchange knowledge about things that are not found in the Knowledge Base. Ask a question that's relevant to your community or help other users by providing an answer to their questions.

**Note:** You must be logged in on the backend in order to perform the tasks below.

## Deleting an Answer

1. In the backend, navigate to **Answers** under the **Components** tab.
2. Go to the **Answers** tab and find the answer to be deleted.
3. Click on the check box for the answer to select it.
4. Click the **Delete** button symbolized by a trash can. The answer will be fully deleted.

### Submitting a Question

1. In the backend, navigate to **Answers** under the Components tab.
2. While on the **Questions** tab, click the **New** button symbolized by a plus sign.
3. Fill in the details of the question being submitted. Check the box for **Anonymous** to remove your name from the question. Select the **Notify of responses** box to get emailed about new responses to the question. Fill in the title and the description of the question. Add tags to the question using the tag box.
4. Click **Save & Close** to save the new question to the hub.



## HUB MANAGERS

---

3. Click the **Browse** button located on the bottom of the **Media Manager** pop-up, and locate and select the picture you would like to upload.
4. Click **Start Upload**. You should then see your picture appear as an option.
5. Copy the file name and paste it into the **Background Image** field.

# Blogs

## Backend Blog Manager Overview

- **Published** - this icon means that the blog post can be viewed on the frontend of the hub.
- **Unpublished** - this icon means that the blog post cannot be viewed on the frontend of the hub.
- **New** - this button allows you to create a new blog post.
- **Edit** - this button allows you to make changes to a blog post.
- **Delete** - this button allows you to delete a blog post.

## Creating a Blog Post

1. In the backend, navigate to **Blog** under the **Components** tab.
2. On the **Blog Manager**, click the **New** button to create a new blog post.
3. In the details of the blog post, select the scope. The scope is the location of the blog either on the site, member, or group. If you're creating a group blog, select the group that the blog should belong to from the drop-down.
4. Fill in at least the title and content for the blog post.
5. In the publishing options of the blog post, select the state of publishing from the drop-down, the dates of when the blog is available, and if you would like to allow comments on the post, check the box for **Allow comments**.
6. Click **Save & Close**.

## Editing a Blog Post

1. In the backend, navigate to **Blog** under the **Components** tab.
2. Find the blog post you would like to edit and click on its title to open the post.
3. Edit the content of the post.
4. Click **Save & Close** to save the newly edited content.

## Deleting a Blog Post

1. In the backend, navigate to **Blog** under the **Components** tab.
2. Find the blog post you would like to delete and click on the check box for that blog post.
3. Click on the **Delete** button symbolized by a trashcan and the blog post will be deleted.

### Publishing a Blog Post

1. In the backend, navigate to **Blog** under the **Components** tab.
2. On the **Blog Manager**, select the location of the blog post from the following tabs: site, members, or groups.
3. Find the unpublished blog post you would like to publish and click on the checkbox next to it to select it.
4. Click **Publish** and the selected blog post will be visible to users.

### Unpublishing a Blog Post

1. In the backend, navigate to **Blog** under the Components tab.
2. On the **Blog Manager**, select the location of the blog post from the following tabs: site, members, or groups.
3. Find the published blog post you would like to unpublish and click on the checkbox next to it to select it.
4. Click **Unpublish** and the selected blog post will be no longer be viewable on the front-end.

# Cart

## Overview

All actions listed here take place in the administrator interface of the hub, similar to <https://hubname.org/administrator>. Proper administrator privileges and logging in are required.

Storefront component can be found by:

1. Log into the administrator interface (/administrator)
2. From the Main Menu point the mouse to Components -> Storefront (click)

# Citations

## Deleting a Citation

1. In the backend, navigate to **Citations** under the Components tab.
2. Find the citation to be deleted, and click on the check box for that citation.
3. Click on the **Delete** icon on the top of the page and the selected citation will be deleted.

# Collections

## Module for Collecting

The hub comes with a module, **mod\_collect**, for collecting a number of content types on the hub: resources, wiki pages, forum threads, courses, publications, and content articles. This module can be enabled via the administrative Module Manager. Once the module is enabled, a “Collect” button will appear on the single “view” pages for the various types of content. Users can then collect resources, wiki pages, etc. The collected material will be saved as a post with a link back to the original content.

Collectible content types:

- Wiki pages
- Forum threads
- Courses
- Resources
- Publications

To enable the module:

1. Navigate to **<https://yourhub.org/administrator/>** and login as an administrative user.
2. In the backend, under the **Extensions** tab, select **Module Manager**.
3. Find the module, and then select the module by clicking the small check box.
4. Once the module has been selected, click **Enable** to enable the module.
5. The module will now be active on the hub and users will be able to collect content for collections.

## Editing Collection Items

(Note: You have to be logged into your hub in order to complete the following tasks)

1. Navigate to **<https://yourhub.org/administrator/>**.
2. Locate the **Components** tab and then select the **Collections** button located in the drop-down.
3. On the Collection page, click the **Items** tab.
4. Locate the item and then check the box beside the title of the item.
5. Click the **Edit** button to edit the item.
6. Make the changes to the item and then click **Save & Close** to save the changes and you will be navigated back to the Collection: Items page.

# Courses

## Creating a Course

1. In the backend, navigate to **Courses** under the Components tab.
2. At the top of the Courses panel, click the **+** sign to add a new course.
3. Fill in the details of the course. (See below for field/option descriptions.)
4. Click on the drop-down section under **Publishing**, and determine if you want your course to be a **Draft** or **Published**.
5. Click on **Save** to save the work that you have completed. You can only further edit your course, such as add an image or managers, after you have saved the initial details.
6. Under the Managers area, add course administrators (Instructors, Managers, etc.).
7. Under the Image area, add a course image by dragging an image file into the upload box.
8. Click **Save & Close** to save all the details of the course and to go back to the Courses main page, where your course will now be listed.

## Field/Option Descriptions

- **Course Alias:** Your course alias. This will be part of the URL.
- **Course Title:** The official name of your course. This name will be what users see when browsing the hub.
- **Interests (tags):** Helps categorize your course in search results. These tags can help your course be discovered more effectually.
- **Blurb:** A short description of the course.
- **Description:** A longer description of the course. Here you can personalize what the goal or concept is in further detail to your students.
- **Unpublished:** The course is taken off the front end of the hub.
- **Published:** The course can be found in the front end. Anyone can find the course through searches.
- **Draft:** The course is being drafted. The course is accessible only to course administrators. This allows instructors and managers to build a course before it is available to students.
- **Deleted:** The course is deleted permanently. Once a course is deleted nothing can be retrieved from the course after this action.

## Creating Course Overview Pages (tabs)

1. In the backend, navigate to **Courses** under the Components tab.
2. Find your course in the list. Under the **Pages** column, click on the **+** sign to add a new

page.

**Note:** If there are already existing pages, you will see a number in place of the + sign.

3. Enter the title, URL, and content into the page details. In the published parameters choose **Yes** to make the page active on the **Course Overview**.

**Note:** Note: A new page must be saved before files can be uploaded.

4. Click **Save & Close** and your new page will appear in the course pages list in the backend. On the frontend, your new page will show as another tab in the Course Overview.

## Opening up Enrollment into a Course

1. In the backend, navigate to **Courses** under the Components tab.
2. Locate the course and click the number of offerings for that course in the **Offerings** column.
3. Locate the offering and click the number of sections for that offering in the **Sections** column.
4. Click the section's title.
5. Under the **Details** tab, locate **Enrollment** and select a response from the drop-down.
  - a. **Open (anyone can join):** Any user on the Hub can join this section of the course.
  - b. **Restricted (coupon code is required):** Only users with a coupon code can gain access to this section of the course.
  - c. **Closed (no new enrollment):** This section of the course is closed and cannot be accessed by new students.

## Editing Parameters in an Offering

1. In the backend, navigate to **Courses** under the Components tab.
2. Locate the course and click the number of offerings for that course in the **Offerings** column.
3. Locate the offering and click the title.
4. Locate the **Parameters** section and select the parameters for **Progress Calculation**.
  - **Inherit from course defaults-** means that all of the parameters preset on the hub will be the same for this offering.
5. Click **Save & Close** to save the parameters for that offering.

### Editing Parameters in a Section

1. In the backend, navigate to **Courses** under the Components tab.
2. Locate the course and click the number of offerings for that course in the **Offerings** column.
3. Locate the offering and click the number of sections for that offering in the **Sections** column.
4. Click the section's title.
5. Under the **Details** tab, locate the **Parameters** section and select the parameters for **Progress Calculation**.
  - **Inherit from course defaults**- means that all of the parameters preset on the hub will be the same for this section.
6. Click **Save & Close** to save the parameters for that section.

### Editing Discussion Parameters

1. In the backend, navigate to **Courses** under the Components tab.
2. Find the course and the click the number in the **Offerings** column.
3. Locate the offering and click the number of sections for that offering in the **Sections** column.
4. Click the title of the section that you would like to change the discussions settings in.
5. Under the **Details** tab, locate the **Discussions Parameters** area. In the drop-down, choose **All sections** to show discussion threads across all sections in this offering, or choose **This section only** to show discussion threads only by this specific section.
6. Click **Save & Close** to save the changes to the parameters.

### Deleting Assets

**Note:** You must be logged into your hub in order to complete the following tasks.

1. Click the **Components** tab and then select the **Courses** button located in the drop-down.
2. On the Courses page, locate the course.
3. After locating the course, under the **Offerings** column, select the number of offerings.
4. On the Courses: Offerings page, locate the offering.

5. Locate the **Units** column and select the number of units.
6. Locate the Unit, then under the **Asset Groups** column select the number of under the column.
7. Inside **Asset Groups**, check the box of the offering.
8. Click the **Delete** button to permanently remove the content and asset from the course.
9. A pop-up will appear asking **Are you sure you want to remove these items?**
10. Proceed to click **Ok**, and the items will be removed from the course.

## Creating Certificates

**Note:** You must be logged into your hub in order to complete the following tasks.

1. Click the **Components** tab and then select the **Courses** button located in the drop-down.
2. On the Courses page, locate the course.
3. After locating the course, under the **Cert.** or certificate column click on the **No Certificate Set** button.
4. On the **Courses: Certificate: Create page**, upload a PDF certificate file by choosing the file from your files and then clicking **Upload**.
5. Once the file is uploaded, a preview will appear.
  - a. The preview is where you can place, drag, and resize various placeholders for elements such as the user's name, course name, etc. to be dynamically filled in when a certificate is claimed.
6. Click the **Save & Close** button in order to navigate back to the Courses page.

## Deleting Certificates

**Note:** You must be logged into your hub in order to complete the following tasks

1. Click the "Components" tab and then select the "Courses" button located in the drop-down.
2. On the Courses page, locate the course.
3. After locating the course, under the **Cert.** or certificate column click on the **Certificate Set** button (?).
4. On the **Courses: Certificate: Create** page, click the **Delete** button.

5. Click the **Save & Close** button in order to navigate back to the **Courses** page.
6. A pop-up will appear stating "Entry successfully removed" and you will be navigated back to the Courses page.

### Changing Deployment Time

**Note:** You must be logged into your hub in order to complete the following tasks.

1. Click the **Components** tab and then select the **Courses** button located in the drop-down.
2. On the **Courses** page, locate the course.
3. After locating the course, under the **Offerings** column, select the number of offerings.
4. On the **Courses: Offerings** page, locate the offering.
5. Locate the **Sections** column and select the number under the column.
6. Check the box of the section, and then click the **Edit** button.
7. In the **Courses: Sections: Edit** page, select the **Dates/Times** tab.
8. Locate the course asset and set a date and time for the content of the asset, which is usually in the third tier inside the asset group.
  - a. Example: Exam> Exam 1> Exam1.
9. Set the date and time by clicking the **From** and **To** boxes to access the time pop-up.
10. Save the changes by clicking **Save & Close** and a pop-up will appear saying "Entry successfully saved".

### Display Number of Users Enrolled in a Course

**Note:** You must be logged into your hub in order to complete the following tasks.

1. Click the **Components** tab and then select the **Courses** button located in the drop-down.
2. On the **Courses** page, select the **Options** button in the top-right corner of the page.
3. Under the **Defaults** tab, locate the **Show Enrollment Numbers** option at the bottom of the pop-up.
4. Select between **Yes** to show enrollment numbers or **No** to not show enrollment numbers from the drop-down.
5. Click the **Save & Close** button to save the new setting and exit out of the pop-up.

### Course Presentations: HUB Presenter

Hub Presenter is a presentation formatting section available to upload large video files inside of Courses. An administrator with privileges to workspace is the only one who can upload these presentation files.

1. Navigate to the HUB and go to **hubname.org/resources**
2. Create a new Resources and make the category **Online Presentations**
3. Fill out the information needed for the Resource and then navigate to the backend of the HUB to make sure that the Resource is **Published**
4. Then, navigate to the HUB **Workspace** and **ssh** into your HUB account
5. Upload the videos & slides of the presentation
  1. Note: Slides must be uploaded in order by appearance as individual images (.jpg) in a zipped folder called Slides, the video must be uploaded as a .webm, .mp4, and a .ogv
    1. Example: media.webm/media.mp4/media.ogv
6. Create a folder called “/slides” and then navigate to /hubname/app/site/resources/XX-XX-XXXX/slides and upload all image slides as a .zip file
  1. Note: "XX-XX-XXXX" is the date of when the resource was created
7. Listed below is an example of the presentation layout:

```
{
  "presentation": {
    "title": "Career Development",
    "type": "Video",
    "media": [
      {
        "source": "media.mp4",
        "type": "mp4"
      },
      {
        "source": "media.webm",
        "type": "webm"
      },
      {
        "source": "media.ogv",
        "type": "ogv"
      }
    ],
    "slides": [
      {
        "title": "Career Development",
        "type": "Image",
        "media": "slides/001.01.jpg",
```

```
    "time": "0",
    "slide": "1"
  },
  {
    "title": "Career Development",
    "type": "Image",
    "media": "slides/001.01.jpg",
    "thumb": "slides/001.01.jpg",
    "time": "8.5752419085752418",
    "slide": "1"
  },
  {
    "title": "Your Career Choices after Graduate School and The Most-Neglected Item in
your Career Development",
    "type": "Image",
    "media": "slides/002.01.jpg",
    "thumb": "slides/002.02.jpg",
    "time": "50.417083750417085",
    "slide": "2"
  },
  {
    "title": "Your Career Choices after Graduate School and The Most-Neglected Item in
your Career Development",
    "type": "Image",
    "media": "slides/002.02.jpg",
    "time": "64.7313980647314",
    "slide": "2"
  },
  {
    "title": "Questions? I Might have replies....",
    "type": "Image",
    "media": "slides/046.01.jpg",
    "thumb": "slides/046.01.jpg",
    "time": "4506.6733400066732",
    "slide": "46"
  }
]
}
```

?

# Extensions

## Overview

HUBzero is already a rich featured content management system but if you're building a website and you need extra features which aren't available by default, you can easily extend it with extensions. There are five types of extensions: Components, Modules, Plugins, Templates, and Languages. Each of these extensions handle specific functionality.

## Components

The largest and most complex of the extension types, a component is in fact a separate application. You can think of a component as something that has its own functionality, its own database tables and its own presentation. So if you install a component, you add an application to your website. Examples of components are a forum, a blog, a community system, a photo gallery, etc. You could think of all of these as being a separate application. Everyone of these would make perfectly sense as a stand-alone system. A component will be shown in the main part of your website and only one component will be shown. A menu is then in fact nothing more then a switch between different components.

## Modules

Modules are extensions which present certain pieces of information on your site. It's a way of presenting information that is already present. This can add a new function to an application which was already part of your website. Think about latest article modules, login module, a menu, etc. Typically you'll have a number of modules on each web page. The difference between a module and a component is not always very clear for everybody. A module doesn't make sense as a standalone application, it will just present information or add a function to an existing application. Take a newsletter for instance. A newsletter is a module. You can have a website which is used as a newsletter only. That makes perfectly sense. Although a newsletter module probably will have a subscription page integrated, you might want to add a subscription module on a sidebar on every page of your website. You can put this subscribe module anywhere on your site.

Another commonly used module would be a search box you wish to be present throughout your site. This is a small piece of re-usable HTML that can be placed anywhere you like and in different locations on a template-by-template basis. This allows one site to have the module in the top left of their template, for instance, and another site to have it in the right side-bar.

## Plugins

Plugins serve a variety of purposes. As modules enhance the presentation of the final output of

the Web site, plugins enhance the data and can also provide additional, installable functionality. Plugins enable you to execute code in response to certain events, either core events or custom events that are triggered from your own code. This is a powerful way of extending the basic functionality.

## Templates

A template is a series of files within the CMS that control the presentation of the content. The template is not a website; it's also not considered a complete website design. The template is the basic foundation design for viewing your website. To produce the effect of a "complete" website, the template works hand-in-hand with the content stored in the database.

## Languages

Probably the most basic extensions are languages. Languages can be packaged in two ways, either as a core package or as an extension package. In essence, these files consist key/value pairs, these pairs provide the translation of static text strings which are assigned within the source code. These language packs will affect both the front and administrator side. Note: these language packs also include an XML meta file which describes the language and font information to use for PDF content generation.

## Conclusion

If the difference between the three types of extensions is still not completely clear, then it is advisable to go to the admin pages of your installation and check the components menu, the module manager and the plugin manager. HUBzero comes with a number of core components, modules and plugins. By checking what they are doing, the difference between the three types of building blocks should become clear.

# Installing

## Overview

See [Extensions](#) in the Web Developer's Guide for details.

# Modules Manager

## Overview

The Module Manager is where you add and edit Modules. In HUBzero, Modules are used to display content and/or media around the main content.

The Module Manager can be found by selecting "Extensions" > "Module Manager" from the drop-down menu on the back-end of your HUB installation.

## Module Facts:

1. All hubs require at least 1 Menu Module
2. All Other Module Types are Optional. (Examples: News, Banner, Latest News, Polls)
3. Every Menu is accompanied by a menu module. (Example mod\_mainmenu)
4. Multiple occurrences of similar module types.
5. Some Modules are linked to components. For example, each Menu Module is related to one Menu component. To define a Menu, you need to create the Menu and Menu Items using the Menus screens and then create the Module for the Menu using this screen. Other Modules, such as Custom HTML and Breadcrumbs, do not depend on any other content.

An installation is accompanied with over 20 default module types.

## Column Headers

Click on the column heading to sort the list by that column's value.

- **Number (#):** An indexing number automatically assigned by Joomla! for ease of reference.
- **Checkbox:** Check this box to select one or more items. To select all items, check the box in the column heading. After one or more boxes are checked, click a toolbar button to take an action on the selected item or items. Many toolbar actions, such as Publish and Unpublish, can work with multiple items. Others, such as Edit, only work on one item at a time. If multiple items are checked and you press Edit, the first item will be opened for editing.
- **Module Name:** The name of the Module. You can click on the name to open the Module for editing.
- **Enabled:** A green tick or a red X showing whether the use of the component is

- enabled/disabled. Click the icon to toggle the item between enabled and disabled.
- **Order:** The order to display modules within a Position. If the list is sorted by this column, you can change the display order of modules within a Position by selecting a Position in the "Select Position" filter and then clicking the arrows or by entering the sequential order and clicking 'Save Order'.
  - **Access Level:** Who has access to this item. You can change an item's Access Level by clicking on the icon in the column. Current options are:
    - **Special:** Only users with author status or higher have access
    - **Registered:** Only registered users have access
    - **Public:** Everyone has access
  - **Position:** The position on the page where this module is displayed. Positions are locations on the page where modules can be placed (for example, "left" or "right"). Positions are defined in the Template in use for the page. Positions can also be used to insert a Module inside an Article using the syntax "{loadposition xxx}", where "xxx" is a unique position for the module.
  - **Pages:** The Menu Items where this Module will be displayed. Options are "All" for all Menu Items, "None" for no Menu Items, and "Varies" for selected Menu Items. A Module will only display on Menu Items where it is selected.
  - **Type:** The system name of the Module. Joomla! installs 20 standard Modules. Many Joomla! Extensions contribute additional Modules.
  - **ID:** The ID number. This is a unique identification number for this item assigned automatically by Joomla!. It is used to identify the item internally, for example in internal links. You can not change this number.
  - **Display Number:** The number of items to display on one page. If there are more items than this number, you can use the page navigation buttons (Start, Prev, Next, End, and page numbers) to navigate between pages. Note that if you have a large number of items, it may be helpful to use the Filter options, located above the column headings, to limit which items display (*where applicable*).

## Toolbars

### Primary Toolbar

- **Enable:** To enable one or more items, select them using the Checkbox and press this button. You may also toggle between Enabled and Disabled by clicking on the icon in the "Enabled" column.
- **Disable:** To disable one or more items, select them using the Checkbox and press this button. You may also toggle between Enabled and Disabled by clicking on the icon in the "Enabled" column.
- **Copy:** To copy one or more Modules, select them using the Checkbox and press this button. A new Module will be created for each selected Module. The new Module will have the name "Copy of" plus the original Module name. Note that the new copies are initially disabled.

- **Delete:** To delete one or more items, select them and click this button. The selected items will be deleted. **Note:** *only empty items can be deleted.*
  - **Edit:** Select one item and click on this button to open it in edit mode. If you have more than one item selected (where applicable), the first item will be opened. You can also open an item for editing by clicking on its Title or Name.
  - **New:** To create a new instance of a Module, press this button. You will be taken to a screen that lists all of the available Modules. See [Module Manager - New/Edit](#) for information about adding Modules.
  - **Help:** Opens this Help Screen.
- 
- **Site and Administrator Links: At the top left, above the Filter.**
  - **Site:** Opens the Site tab. This is the default tab and allows you to manage the Modules for the front end of the web site.
  - **Administrator:** This tab allows you to manage the Modules for the back end administration of the web site. If you do not need to change the Joomla! administrator menus, no modifications are required here.

## List Filters

### Filter by Partial Title

You can filter the list of items by typing part of the title or the ID number. Or, you can select a combination of Category and Published State.

- **Filter:** In the upper left corner just above the column headings is a Filter field and two buttons, as shown below:
  - If you have a large number of items on the list, you can use this filter to find the desired item(s) quickly. Enter either part of the title or an ID number and press 'Go' to display the matching items. You can enter in whole words or part of a word. For example, "ero" will match all titles with the word "Hubzero" in them.

### Filter by Template, Position, Type and Published State

In the upper right area, above the column headings, are following drop-down list boxes as shown below. The selections may be combined. Only items matching both selections will display in the list.

- **Select Template:** Select the Template from the drop-down list box of available Templates. Only Templates that are enabled for this site will display.
- **Select Position:** Select a Position from the drop-down list box of available Positions.

- **Select Type:** Select the Module Type from the drop-down list box of available Module Types. HUBzero installs with 20 available Module types. Additional ones may be available if you have installed any Extensions.
- **Select State:** Use the drop-down list box to select the published state: Enabled or Disabled.

### Create/Edit Modules

When you create a new Module, you will select the Module Type. This will determine what type of content this Module can display. If you edit an existing Module, the Module Type will already be determined. **Note:** You cannot change the Module Type of an existing Module.

All Modules have two sections that are the same: Details and Menu Assignment. The Parameters are different for each Module Type.

- **Module Type:** This displays the system name of the module. No entry is allowed.
- **Title:** The Title of the Module.
- **Show Title:** Whether or not to show the Title of the Module.
- **Enabled:** Whether or not the Module is enabled. If "No", the Module will not be shown on the page.
- **Position:** The Position on the page to show the Module. There are two types of Positions you can use.
  - You can select a Position from the drop-down list box. The Positions in the list box are those provided by your Template. You can see the available Positions on the page by adding the letters "?tp=1" to the end of any front-end Joomla! URL. For example, if your home page is "www.mysite.com", you can type the URL "www.mysite.com?tp=1". The page will display with labeled rectangles indicating each pre-defined Position for the current Template.
  - You can type in a Position that is different from the pre-defined positions (for example, "myposition1"). This type of Position can be used to insert a Module into an Article. If you enter the code "{loadposition xxx}" inside the text of an Article, where "xxx" matches the Position of a Module, and if the Module is assigned to the the Menu Selection where the Article is displayed (see [Menu Assignment](#) below), then the Module will be displayed at that point in the Article.
- **Order:** The Order that this Module will be displayed within the Position. If more than one Module is displayed at the same position, this will determine the order of display. The drop-down list box shows all Modules displaying at the current Position. Select the Module that you want the current Module to *follow*.
  - You can also change the order of display in the Module Manager. The Module Order is only important when two or more Modules are displaying at the *same Position* and on the *same Menu Selections*.
- **Access Level:** Who has access to this item. Enter the desired level using the drop-

down list box. Current options are:

- **Public:** Everyone has access
- **Registered:** Only registered users have access
- **Special:** Only users with author status or higher have access
- **ID:** The ID number. This is a unique identification number for this item assigned automatically by Joomla!. It is used to identify the item internally, for example in internal links. You can not change this number.
- **Description:** A description of what the Module does. No entry is allowed.

### Menu Assignment

This is where you tell the CMS which pages to show this Module on. This Module will show on the page when this Menu Item is selected. If the Menu Item allows the user to navigate to sub-pages, then this Module will also show on these sub-pages. For example, if the Menu item is a Blog Layout, the Module will also show when the user clicks on a "Read more..." link, an Article Link, or a Page Navigation link from that Blog Layout.

- **Menus:** "All" means show the current Module on all Menu Items. "None" means don't show the Module on any Menu Items. "Select Menu Item(s) from the List" allows you to select which Menu Items to show the Module on.
- **Menu Selection:** If "Select Menu Items(s) from the List" above is selected, select individual Menu Items that will display the Module.
  - Use Ctrl+Click to select multiple Menu Items.
  - Use Shift+Click to select a range of Menu Items.
  - If you want to select most of the Menu Items, first click "All" above under Menus and then click "Select Menu Items(s) from the List". All of the Menu Items will be selected. Then use Ctrl+Click to deselect the Menu Items you don't want to include.
  
- **Parameters:** This will vary between modules.

# Templates Manager

## Overview

The Template Manager is where you assign a default Template to your web site. You can also edit and preview Templates here.

The visual layout of both the Front-end and Back-end of your site is controlled by the Template. Templates are extensions that contain layout and style information that tells the CMS exactly how to draw each page of your site.

When you first install a hub, one Back-end Template and one or more Front-end templates are included. Other Templates can be installed from third-party developers as Extensions.

If you want to use the same Template for all of the pages on your site, you just assign one Template as the Default Template. You can also assign different Templates to different pages.

Select "Extensions" ? "Template Manager" from the drop-down menu in the back-end of your installation.

## Column Headers

- **#:** An indexing number automatically assigned by Joomla! for ease of reference.
- **Template Name:** The name given to each Template by the Template author. Click the Name to open the Template for editing. If you hover the mouse over the Template Name, a small preview for the Template displays in a pop-up window. The Template Name normally corresponds to the sub-directory name that contains the Template in the <path-to-app>/templates/ directory. For example, the files for the "kimera" Template are in the directory <path-to-app>/templates/kimera
- **Default:** Indicator of Default Template.
- **Assigned:** Shows whether this Template has been assigned to any specific menu items. To assign a template to menu items, open the Template for editing.
- **Version:** The version number of the Extension.
- **Date:** The date this extension was released.
- **Author:** The author of this extension.
- **Display #:** The number of items to display on one page. If there are more items than this number, you can use the page navigation buttons (Start, Prev, Next, End, and page numbers) to navigate between pages. Note that if you have a large number of items, it may be helpful to use the Filter options, located above the column headings, to limit which items display (*where applicable*).

### Toolbars

- **Default:** Select the Template that you want to be the default Template. Then click this button. The default star symbol will show in the Default column, indicating that this is now the default Template.
- **Edit:** Select one item and click on this button to open it in edit mode. If you have more than one item selected (where applicable), the first item will be opened. You can also open an item for editing by clicking on its Title or Name. See the section below called [Template - Edit](#) for information on the edit screen.
- **Help:** Opens this Help Screen.

### Changing Text and Color

(**Note:** You have to be logged into your hub in order to complete the following tasks)

1. Click the **Extensions** tab and then select the **Template Manager** button located in the drop-down.
2. On the **Template Manager: Styles** page, check the box of the **kameleon (admin)** template and then click the **Edit** button.
3. Change the Header to **Light** or **Dark** from the drop-down.
4. Change the **Theme** or main color of the backend by either choosing a color from the drop-down or by selecting **Custom (color specified below)** and fill in a color code in the **Custom color box**.
5. Save the changes by clicking **Save & Close** and a pop-up will appear saying **Style successfully saved**.

# Plugins Manager

## Overview

The Plugin Manager allows you to enable and disable Joomla! Plugins and to edit a Plugin's Details and Parameters.

The Plugin Manager can be accessed by selecting "Extensions" > "Plugin Manager" from the drop-down menu on the Back-end of your HUBzero installation.

- **Plug-in Name:** The name of the plug-in. The name explains where the plug-in is located and what the plug-in is for.
  - For example: "Dashboard-Collections" means that the plug-in is on the user's Dashboard with a module for Collections.
- **Status:** If the plug-in is viewable on the Hub or not.
  - Enabled: The plug-in is available on the frontend and on the backend of the Hub.
  - Disabled: The plug-in has been removed from the frontend of the Hub but is still accessible on the backend.
- **Ordering:** Where the plug-in is on the master list of plug-ins. This list can be seen when plug-ins are being enabled the ordering determines how the plug-in is displayed in the drop-down.
- **Type:** The location of the plug-in.
  - This is the first part of the plug-in's title.
- **Element:** What the plug-in is implementing.
  - This is the second part of the plug-in's title.
- **Access:** Who is able to view or use the plug-in.
  - Public: All visitors or users on the Hub are able to view and use the plug-in.
  - Registered: Only registered users are able to view and use the plug-in.
  - Special: Only users given special permissions can access and use the plug-in.
- **ID:** The identification number given to the plugin after it was created on the Hub. This allows for easier search results.

## Column Headers

- **#:** An indexing number automatically assigned by Joomla! for ease of reference.
- **Checkbox:** Check this box to select one or more items. To select all items, check the box in the column heading. After one or more boxes are checked, click a toolbar button to take an action on the selected item or items. Many toolbar actions, such as Publish and Unpublish, can work with multiple items. Others, such as Edit, only work on one item at a time. If multiple items are checked and you press Edit, the first item will be

opened for editing.

- **Plugin Name:** The Name of the Plugin. Click on the Name to open the Plugin for editing.
- **Enabled:** A green tick or a red X showing whether the use of the component is enabled/disabled. Click the icon to toggle the item between enabled and disabled.
- **Order:** The order to display items. If the list is sorted by this column, you can change the order by clicking the arrows or by entering the sequential order and clicking 'Save Order'. Note that the display order on a page is set in the Parameters - Advanced section for each [Menu Item](#). If that order is set to use something other than 'Order' (for example, 'Title - Alphabetical'), then the order value in this screen will be ignored. If the Menu Item Order parameter is set to use 'Order', then the items will display on the page based on the order in this screen.
- **Access Level:** Who has access to this item. You can change an item's Access Level by clicking on the icon in the column. Current options are:
  - **Public:** Everyone has access
  - **Registered:** Only registered users have access
  - **Special:** Only users with author status or higher have access
- **Type:** The Type of the Plugin. Possible types are: authentication, content, editors, editors-xtd, search, system, user, and xmlrpc. These are also the names of the subfolders where the Plugin files are located. For example, Plugins with a Type of "authentication" are located in the folder "plugins/authentication".
- **File:** The name of the Plugin files. Each Plugin has two files, a ".php" file and a ".xml" file. So, for example, the Authentication - Facebook plugin has two files: "facebook.php" and "facebook.xml".
- **ID:** The ID number. This is a unique identification number for this item assigned automatically by Joomla!. It is used to identify the item internally, for example in internal links. You can not change this number.
- **Display #:** The number of items to display on one page. If there are more items than this number, you can use the page navigation buttons (Start, Prev, Next, End, and page numbers) to navigate between pages. Note that if you have a large number of items, it may be helpful to use the Filter options, located above the column headings, to limit which items display (*where applicable*).

## Toolbars

- **Enable:** To enable one or more items, select them using the Checkbox and press this button. You may also toggle between Enabled and Disabled by clicking on the icon in the "Enabled" column.
- **Disable:** To disable one or more items, select them using the Checkbox and press this button. You may also toggle between Enabled and Disabled by clicking on the icon in the "Enabled" column.
- **Edit:** Select one item and click on this button to open it in edit mode. If you have more than one item selected (where applicable), the first item will be opened. You can also

open an item for editing by clicking on its Title or Name.

- **Help:** Opens this Help Screen.

### List Filters

You can filter the list of items by typing in part of the Title or the ID number. Or you can select a combination of Category and Published State.

- **Filter:** If you have a large number of items on the list, you can use this filter to find the desired item(s) quickly. Enter either part of the title or an ID number and press 'Go' to display the matching items. You can enter in whole words or part of a word. For example, "ooml" will match all titles with the word "Joomla!" in them.
- **Filter by Type and State: The selections may be combined. Only items matching both selections will display in the list.**
- **Select Type:** Select a Type from the drop-down list box to select only Plugins of this Type.
- **Select State:** Select a state (Enabled or Disabled) from the drop-down list box to select only Plugins with this state.

### Edit Plugins

You can edit details and parameters for Plugins. Some Plugins have several parameters, while others don't have any.

- **Details:** The Details section is the same for all Plugins, as follows:
- **Name:** The Name of the Plugin.
- **Enabled:** Whether or not this Plugin is enabled.
- **Type:** The Type of the Plugin. This value cannot be changed.
- **Plugin File:** The name of the Plugin file. Each Plugin has two files with this name. One has the file extension ".php" and the other has the file extension ".xml".
- **Access Level:** Who has access to this item. Enter the desired level using the drop-down list box. Current options are:
  - **Public:** Everyone has access
  - **Registered:** Only registered users have access

- **Special:** Only users with author status or higher have access
- **Order:** The order this item will display in the Manager screen. Use the drop-down list box to change the Order. You can select 'First' or 'Last' to make this the first or last item. Or you can select an item from the list. In this case, the current item will be listed just *after* the item you select. Note that the Order can also be changed in the Manager screen.
- **Description:** The description of what this Plugin does. This cannot be changed.
- **Parameters:** This will vary between plugins.

### Reordering

1. Log in to the backend of the Hub and access the **Extensions** tab.
2. Click on the **Plugin-in Manager** navigate to the **Plug-in Manager: Plug-ins** page.
3. Locate the column labeled **Ordering** and then click on the title of the column.
4. Arrows will appear on the left side of the numbering.
5. To begin reordering click the arrows up or down to reorder the plug-ins.
6. Save the changes by clicking the **Save** icon.

### Enabling a Plug-in

1. Log in to the backend of the Hub and access the **Extensions** tab and then click on **Plug-in Manager**.
2. Locate the plug-in that needs enabling and select the box beside the plug-in's name.
3. Click **Enable** to enable the plug-in.
4. The plug-in will now be useable on the frontend of the Hub.

### Editing a Plug-in

1. Log in to the backend of the Hub and access the **Extensions** tab and then click on **Plug-in Manager**.
2. Locate the plug-in that needs editing and select the box beside the plug-in's name.
3. Click **Edit** to begin editing the plug-in.
4. Click **Save & Close** to save the newly edited content.

### Disabling a Plug-in

1. Log in to the backend of the Hub and access the **Extensions** tab and then click on **Plug-in Manager**.
2. Locate the plug-in that needs disabling and select the box beside the plug-in's name.
3. Click **Disable** to disable the plug-in.
4. The plug-in will now be removed from the frontend of the Hub, but still accessible from the backend.

# Uninstalling

## Overview

See [Uninstalling Extensions](#) in the Web Developer's Guide for details.

# Authentication

## Why it matters?

By default, your hub comes configured to allow local account creation and authentication. In addition to this default option, HUBzero gives you the ability to extend the authentication process by adding support for third party services, like Facebook, Google, and LinkedIn. Using one or more of these providers, users are given a "single sign-on" experience, while easing the barriers to entry caused by the account creation process. Plus, as more social networking features are developed for the hubs - like posting new resources to your Facebook wall - users will already have that link setup between their hub and Facebook identities.

In brief, that's the principle behind offering multiple authentication options to users. Keep reading to find out how to set it up on your hub!

## Setup

Prior to starting this process, you will have to register an "app" for your hub on a given provider's website. A few examples include:

- <https://developers.facebook.com/apps>
- <https://developer.linkedin.com/> (go to "API Keys")
- <https://developers.google.com/> (go to the API console)

NOTE: the information above is accurate as of Aug 2012. It will undoubtedly change. Exact steps and terminology differs between providers.

Whichever provider you're interested in, you'll need to register a new app to obtain an app ID/key and secret (terminology may be slightly different between providers). Once you've completed the registration process and obtained the API key and secret, you can jump over to the hub.

NOTE: the OAuth protocol requires the specification of a redirect URI. Most of the providers mentioned above require you to specify the redirect domain (usually just your hub URL). The Google API requires you to specifically list any redirect URI's that will be used. These should be as follows:

(HUBzero 1.1 - see image below)

`https://yourhub.org/index.php?option=com_user&task=login&authenticator=google`

`https://yourhub.org/index.php?option=com_user&task=link&authenticator=google`

(HUBzero 1.2)

`https://yourhub.org/index.php?option=com_users&task=user.login&authenticator=google`

`https://yourhub.org/index.php?option=com_users&task=user.link&authenticator=google`

## HUB MANAGERS

---

Setup begins in the administrative interface for your hub. First, navigate to "Extensions -> Plugin Manager", and filter the results to the "authentication" type.

Next, select the plugin you desire to enable (we'll use Facebook in this example).

In the plugin edit screen, fill in the appropriate values for App ID and Consumer Secret as obtained above. Also be sure to enable the plugin.

That's about it! Now, when you go to your hub's login page, you'll see a new option for Facebook login.

### More details

#### **What happens if someone already has a local hub account, but wants to start using a new third party provider?**

Users that already have hub accounts can go to the accounts tab of their members page. From there, they can link their existing account with external providers. Additionally, if a user tries to log in with an external account that doesn't match one used on the hub before, we check to see if we can match them with an already existing hub account prior to talking them through the new account creation process.

### Purdue Hubs

In addition to the authentication options mentioned above, HUBzero has also developed an authentication plugin for the Purdue Central Authentication Service (CAS). If you're interested in taking advantage of this service, follow the instruction here:

[https://www.purdue.edu/apps/account/docs/CAS/CAS\\_information.jsp](https://www.purdue.edu/apps/account/docs/CAS/CAS_information.jsp) to register your hub with the Identity and Access Management Office at Purdue. Once this is done, simply turn the plugin on and you'll be all set.

Other institutions or universities may find the Purdue CAS plugin a good template for developing their own CAS authentication plugin. If you're developing a plugin that uses Oauth, consider using the Facebook plugin as a starting point.

## Components

## Answers

## Blog

## Citations

## Collections

## Cron

### Events

### Categories

#### Creating a category

Click “New” (green circle with a plus sign) in the upper right portion of the page.

You will be presented with a form to enter your new category. Only the field labeled “Title” is required.

When done, click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page.

### **Editing a category**

To edit a category, click the title in the category listing or check the box next to the title and click the “Edit” button in the upper right of the page.

All other steps are identical to category creation above.

### **Deleting categories**

To delete one or more event categories, check the box next to the category you wish to delete

## HUB MANAGERS

---

and hit the “Delete” button in the toolbar located at the top right of the page.

## Groups

# Polls

## Adding a Poll

To add a new poll to you HUB:

1. Log on to the backend. (<https://yourhub.org/administrator>).
2. Navigate to "Components -> XPolls" on the main menu bar.
3. Click the "New" button in the top right corner of your screen to add a new poll.
4. Fill in the details of your poll in the fields provided.
5. Select "Save".

**Note:** Users can only vote on the most recent open poll, but they can view results for all of the published polls.

# Projects

## Component Configuration

The Projects component has a number of configuration parameters that let you customize projects on your hub. Go to **/administrator ? Components ? Projects ? Options** to edit settings. Your options are explained below.

- **Component ON/OFF** Main switch of projects on your hub. When turned off, /projects will redirect to hub's home page.
- **Collect grant info at setup?** Include/hide a section with questions about grant information, e.g. [NSF] grant id, title, PI and award amount, at project setup. Some hubs collect this information to provide larger disk space quotas for sponsored projects.
- **Setup - 'Agree to Terms' screen** Enable/disable 'Agree to Terms' step at project setup. *Warning: this setting should be set only once at initial hub setup. Once enabled, do NOT disable. Disabling the agreement step will render all projects currently in setup as inactive. On the other hand, enabling the agreement after it was disabled will force project creators to return to setup stage and accept the Terms. It is generally recommended to have the agreement step enabled.*
- **Allow project settings editing?** Enable/disable a screen to edit project settings after project setup.
- **Ask about sensitive data?** Include/hide a question about sensitive data (HIPAA/FERPA/Export Control) at project setup. There is an optional approval process for projects containing sensitive data.
- **Must approve sensitive data projects?** Require approval for sensitive data projects. If approval is required, a project with sensitive data will not be immediately available to project team. An approval has to come from user(s) in admin group specified in "Sensitive data reviewers group" parameter. [Learn more](#) about managing sensitive data projects.
- **URL to Privacy Terms** Shown at project setup, when user needs to agree to Privacy Terms.
- **URL to HIPAA information** The Health Insurance Portability and Accountability Act of 1996 (HIPAA) rules create a framework to protect the privacy and security of patient's and health plan member's health information. When including a question about sensitive data, provide a URL to explain HIPAA rules.
- **URL to FERPA information** FERPA is the Family Educational Rights and Privacy Act and is a federal law that was enacted in 1974. FERPA protects the privacy of student education records. All educational institutions that receive federal funding must comply with FERPA. When including a question about sensitive data, provide a URL to explain FERPA rules.
- **Restrict project creation to group** Alias of a group whose members can create projects. When set, all other users will not be able to create new projects on the hub.
- **Admin group** Alias of an administrative group that gets notified when a new project is created or over quota
- **Sensitive data reviewers group** Alias of an administrative group that can access a

special project listing to review info on HIPAA/FERPA/export control.

- **Sponsored projects reviewers group** Alias of an administrative group that can access a special project listing to review and edit sponsored project information and bump up quota.
- **Minimum characters in name** Min number of characters a project alias name can contain.
- **Maximum characters in name** Max number of characters a project alias name can contain.
- **Reserved project names** Comma-separated list of words and character combinations that cannot be used as project alias names. These are usually reserved for component task names used in features in development.
- **Files Git repo path** Master path for storing project files Git repos. Default path: /srv/projects. The system administrator needs to ensure the path exists and is writable by www-data before any project is created.
- **Files repo path is...** relative to web root/ absolute. Default value: absolute.
- **Git path** Path to Git. Default: /usr/bin/git
- **Default quota (GB)** Default disk quota for project files repos, in gigabytes. Note: admins can overwrite the default value and set specific project quota when editing a project in the back-end. When default value is overwritten for a specific project, any changes to default value have no effect in this particular project and must be adjusted manually when required.
- **Premium quota (GB)** Premium disk quota for project files repos, in gigabytes. Premium quotas are usually assigned for approved grant-sponsored projects.
- **Quota warning at (%)** Issue disk quota warning when disk space is used at a certain percentage amount of the given quota. Default value: 90.
- **Publication quota (GB)** Default disk quota for published files, in gigabytes.
- **Premium publication quota (GB)** Premium disk quota for published files, in gigabytes.
- **Image path** File path to project images (thumbnails). Default: /site/projects
- **Default picture** Path to default placeholder picture for project thumbnail. Default path: /components/com\_projects/assets/img/project.png
- **Log activity** Enable/disable detailed activity logging. The stored logs track page views and activity by type within projects and can help analyze usage patterns.
- **Messaging** Enable/disable hub messaging. Messages are sent to invited project members, to project managers about project status changes or to publication authors about publication status changes. Turning off messaging may be useful in test hub environments. On live hubs it is highly recommended to keep messaging enabled.
- **Default privacy** Default privacy for newly created projects: private or public.
- **Browse paging limit** Number of projects per page on Projects Browse page.
- **Side module item limit** Limit of items (files, notes etc.) in side modules of each project page.
- **Project group prefix** Prefix for project group name (system group provisioned for each project to handle permissions). Default: *pr-*. *Warning! Never change the value once configured at initial hub setup.*
- **URL to documentation** URL to a page with the projects user guide. By default links to /projects/features page briefly describing project features.
- **Auto-install** Check database setup on every visit and automatically add missing

database entries. When turned off, system administrators will need to manually install database updates when new features are added.

### Project Files Configuration

Project Files configuration is found under **/administrator ? Extensions ? Plug-in Manager ? plg\_projects\_files**. Below is a list of Project Files plugin parameters explained:

- **Max Upload Size (Bytes)** Maximum upload size for project files. The value should not be greater than the file upload limit in your hub's php configuration.
- **Max Download Size (Bytes)** Maximum download size for project files. This setting is only used in case of batch downloads, to guard against archival packages getting too large for the server to handle. Individual file downloads are not checked against this parameter.
- **Reserved Directory Names** Comma-separated list of names that are not allowed for top-level directories within project files repos. Used to reserve directory names for features in development.
- **Google Connection Enabled** Enable GDrive connection. Will not work without Google Client ID, Secret and API key entered.
- **Connected Projects** Comma-separated list of aliases of projects that can connect to GDrive. Empty field means ALL projects can connect.
- **Google Client ID** Client ID for web applications from Google API Console. See [instructions](#) for setting up GDrive Connection for projects.
- **Google Client Secret** Client Secret for web applications from Google API Console. See [instructions](#) for setting up GDrive Connection for projects.
- **Google API Key** API key from Google API Console. See [instructions](#) for setting up GDrive Connection for projects.
- **Auto Sync** Frequency of automatic sync with Google, when GDrive connection is enabled for projects.
- **Enable LaTeX Compile** Enable compile feature for .TEX files
- **Path to LaTeX** Path to pdflatex. Default: /usr/bin/
- **Path to Ghostscript** Path to Ghostscript (used to produce images out of PDF for browsers that cannot embed PDFs. Default: /usr/bin/

### Enabling GDrive Connection for Project Files

To enable GDrive connection for hub projects you would need a Google account for your hub with API access enabled. Because your Google email address and profile picture will be displayed to users as they connect via projects, it is best to create a new Google account representing your hub, rather than using your personal account.

## HUB MANAGERS

---

To sign up for a Google account, follow a *Sign Up* link on [Google Accounts](#)

Once you have a Google account, login to [Google API Console](#) and click the button to **Create a**

### ***Project.***

Next you will be asked to selected services for your new API project. Turn on Drive API and

Drive SDK services, accepting service terms.

## HUB MANAGERS

---

On Branding Information screen enter ***Project Files to Google Drive Connector*** under Product name. For the Product logo we recommend that you use HUBzero image at <http://hubzero.org/app/site/media/images/sync.png>. Enter your hub URL for Home Page URL

and go to next screen.

On Client ID Settings screen choose *Web application* as Application type, enter your hub host

name and click on ***Create client ID***

Once your Client ID for web applications is created, click to Edit settings and change Authorized

Now you have all you need to enable GDrive Connection for projects in your hub. Login to your hub's administrator back-end, go to *Plug-In Manager* and open *Project Files* plugin settings. Choose *Yes* for *Google Connection Enabled* parameter and fill in *Google Client ID*, *Client Secret* and *API Key* under plugin Basic Options.

If you want to offer GDrive connection for selected projects only, enter the aliases of those projects under *Connected projects*. Another optional setting is *Auto Sync*, which allows you to

set desired auto sync frequency.

Now selected or all projects should have GDrive connection enabled. Individual creators of those projects will now be able to see the *Connect* button in Project Files and establish the connection. GDrive Connection User Guide available at </documentation/1.2.0/users/projects/projectfiles>.

## Managing Sensitive Data Projects

*Sensitive data can include personal, financial, and legal information, as well as information protected by state or federal laws and by university policy. Federally-protected restricted data include all individually identifiable health information (HIPAA-protected information), student records and grades (FERPA-protected information).*

As a hub manager, you need to have a plan for managing projects containing sensitive data. "**Ask about sensitive data?**" parameter in Projects [component configuration](#) offers three options:

1. **No** - do not ask about sensitive data. The question about data will then be omitted during project setup. Project creator will not be warned about storing sensitive data and can proceed with project setup. Use this option on hubs where data sensitivity is not an issue or your hub is otherwise protected. You may want to include a clause about sensitive data in your site usage terms.
2. **YES, with one general question** - project creator will need to agree not to store any

3. **YES, with HIPAA/FERPA etc. options** - details on sensitive data will be presented. Only certain types of sensitive data are allowed, upon expert approval. The picture

**"Must approve sensitive data projects?"** parameter in Projects [component configuration](#) controls what happens when the user checks sensitive data box(es) on screen above and proceeds with project setup. If administrator approval is required, the project will fall into suspended status immediately project setup is complete:

Administrator(s) in **"Sensitive data reviewers"** group (assigned in component parameters) will get notified by email of a new project requiring approval. The link to the page to manage and approve sensitive data projects will be included in the email. This protected page can be found at `/projects/browse/?reviewer=sensitive`. Reviewers see a list of projects requiring approval and take action by clicking on Approve button:

The approval screen provides an area to communicate with project creator with or without project approval.

As soon as a project is approved, team members get notified and can start using their project.

## Managing Sponsored Projects

Hubs that offer Projects as a data management solution for faculty may want to collect awarded grant information to allocate the appropriate amount of data storage space to sponsored projects. To turn on grant information questions, go to Projects [component configuration](#) and enable **"Collect grant info at setup?"** setting.

When grant information is filled out, dedicated reviewers (members of admin **"Sponsored projects reviewers"** group assigned in [component configuration](#)) will get notified by email with a link to manage and approve projects for larger disk space. The protected page can be found at `/projects/browse/?reviewer=sponsored`. Reviewers see a list of projects requiring approval and take action by clicking on **Manage** button:

The approval screen provides an area to communicate with project creator, approve or reject disk space increase.

Approved projects automatically get their project disk space quota upgraded to the **Premium Quota** specified in [component configuration](#)

Project managers can add/edit grant information at any time after a project has been created and optionally re-submit this information for administrator approval. The grant information would show up under *Edit Settings*:

## Enabling Publishing

*Projects integrate a publishing engine to get project materials delivered to the world in the form of web publications. Each publication receives a Digital Object Identifier so that others can cite it. Public can write reviews and add ideas to the Wish List for each publication.*

## Publication versus Resources

Hub **Publications** look and function much like hub **Resources**. In fact, **Publications** are meant to replace **Resources** in the foreseeable future, once all resource types are supported in the new publishing process. As of today, users can publish documents and databases (if DataStore Lite is enabled). Next in line for publication are project notes, tools and external links. If your new hub is not planning on publishing tools other than *Workspace Tool*, you can enable **Publications** on your hub and turn off **Resources**. On the other hand, if you are using **Resources** extensively or plan to immediately publish tools, it is best NOT to enable

**Publications** for the time being to avoid any possible confusion.

### Steps to enable Publishing

1. Ensure that **Auto-install** option is set to **ON** in [component configuration](#).
2. Go to **/administrator ? Extensions ? Plug-in Manager** and enable Project Publications plugin (**pls\_projects\_publications**)
3. Go to *yourhub/projects* and refresh the page once. At this point the auto-install script should have done the work of checking hub database structure and adding anything missing.
4. Next go to **/administrator ? Components ? Publications ? Options** and make sure **Component ON/OFF** parameter is set to **ON**. *Note: if you do not see **Publications** in the component menu, you can access it by going to [/administrator/index.php?option=com\\_publications](#).*
5. Configure publishing as needed, following the detailed explanation of [Publications Component Configuration](#).

# Publications

## Component Configuration

Publications component configuration controls the display of publications pages, as well as the publication submission flow. To edit settings, go to **/administrator ? Components ? Publications ? Options**. Your options are explained below.

- **Component ON/OFF** Enable/disable Publications on your hub. When turned off, /publications will redirect to /resources.
- **Auto-approve** Automatically approve new submissions.
- **Auto-approved Users** A comma-separated list of login names of users whose publication submissions get auto-approved.
- **Email authors** Email contributors when administrator make changes to status of a publication.
- **Default category** Optionally set the browsing category of newly created publications to the specified value if exists. Default: *dataset*
- **Default picture** Default placeholder thumbnail image for all publications. Default: */components/com\_publications/assets/img/resource\_thumb.gif*
- **Default tool picture** Default placeholder thumbnail image for tool publications. Default: */components/com\_publications/assets/img/tool\_thumb.gif*
- **Default video file thumbnail** Default placeholder thumbnail image for video-type files in publication gallery. Default: */components/com\_publications/assets/img/video\_thumb.gif*
- **Default image file thumbnail** Default placeholder thumbnail image for image-type files in publication gallery. */components/com\_publications/assets/img/gallery\_thumb.gif*
- **Publication file path** Master path for storing published data. Default: */site/publications*

## Digital Object Identifiers.

*All required fields must be filled for the DOI service to work. If Service or Shoulder are left blank, publications will be released without a DOI. If other required fields are left blank, there will be a failed attempt to create a DOI resulting in error for end-user.*

- **About DOI link** A link to an explanation of what Digital Object Identifiers (DOI) are. [\[optional\]](#)
- **DOI shoulder** Shoulder for issuing DOIs (what goes after doi:) **[required]**
- **DOI handle prefix** Prefix for DOI handles if required.
- **DOI service** DOI service URL **[required]**
- **DOI Service User/Password** DOI Service User/Password **[required]**
- **DOI XML Schema** URL of XML validation schema **[required]**
- **DOI publisher** Publisher name (may use full Hub name) for DOI service. Defaults to Hub name.
- **DOI resolve url** URL for resolving DOIs. Default: *http://dx.doi.org/*
- **DOI verify url** URL for verifying DOIs

- **Supported Tag** A tag to indicate organization-supported publications.
- **Supported Link** A link to describe organization-supported publications.

### Show/hide publication information

Next series of parameters lets you show/hide the following data/sections on the publications page and/or during draft editing:

- **Contributors**
- **Ranking**
- **Rating**
- **Date**
- **Citations**
- **Tags**
- **Metadata**
- **Release Notes**
- **Access**
- **License**
- **Gallery**
- **Audience**

- **Suggest license** Allow users to suggest licenses. License suggestions get sent to administrators via support tickets. Administrator can then add a requested license via Publications back-end interface.
- **URL to Terms of Deposit** URL to a page with information on Terms of Deposit. This field is required. No value results in an invalid link at pre-publication review screen.

### Enabling LinkedIn Share Plugin

(Note: You have to be logged into your hub in order to complete the following tasks)

1. Click the “Components” tab and then select the “Publications” button located in the drop-down.
2. On the Publications page, select the “Plugins” tab.
3. Click the title of the “Publications -Share” plugin.
4. Under the “Basic Options” section, enable the LinkedIn icon share plugin by changing the radio button to “Yes”.
5. Click the “Save & Close” button to save the changes and navigate back to the

Publications page.

### **Enabling Pinterest Share Plugin**

(Note: You have to be logged into your hub in order to complete the following tasks)

1. Click the “Components” tab and then select the “Publications” button located in the drop-down.
2. On the Publications page, select the “Plugins” tab.
3. Click the title of the “Publications -Share” plugin.
4. Under the “Basic Options” section, enable the Pinterest icon share plugin by changing the radio button to “Yes”.
5. Click the “Save & Close” button to save the changes and navigate back to the Publications page.

# Resources

## Types

Users may contribute many types or categories of resources. All HUBs come with a default set of types. They are:

- Animations
- Courses
- Downloads
- Learning Modules
- Notes
- Online Presentations
- Publications
- Series
- Teaching Materials
- Tools
- Workshops

Some types can be contributed by any user via the front-end "contribute" component. Some types, such as Learning Modules or Series cannot presently be contributed via the front-end due to their complex nature (more on this below).

## Creating New Types

The default list of types may not completely suit your needs and you may wish to add your own, new types. This can be done from the administrative back-end of the site by following these steps:

1. Login to the administrative back-end.
2. Once logged in, find "œComponents"• in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of all the installed components on your HUB.
3. Select "Resources"• from the list.

## HUB MANAGERS

---

Once the "Resources Manager" page has loaded, select "Types" from the sub-menu found under the "Resources Manager" title.

You should now be presented with a list of all the "Main Types" (selected by default). There are multiple categories of types. If not already selected, select "Main Types" from the "categories" option found directly above the list or navigate the listing until you see those designated as "Main Types". These are the primary types of resources users will be able to contribute, browse, etc.

Click the title of a type to edit it or click "New Type" (green circle with a plus sign in the middle) from the toolbar on the top right of the page.

## HUB MANAGERS

---

Fill in the title field (what you want this type to be called) and select "Main Type" from the category list. You may then optionally fill in a description (longer explanation) of this type.

Decide if this resource type can be contributed from the front-end "œcontribute"• component by checking/unchecking the "contributable"• checkbox. Due to the complex structure of some resources, the front-end "contribute"• component cannot handle the creation of some resource types. This checkbox ensures what such a resource type does not accidentally show up as a type the user can self contribute.

Next, you may decide what custom fields you wish to have filled in by the user for that resource type. Options are single-line text boxes, multi-line text areas, checkboxes, select list (pull down), radio options, pre-defined options (language list, etc.). A field may be required or not.

Click "Save"• (icon looks like a floppy disk) in the toolbar on the top right of the page.

New resource types should now be available as a resource option and changes to types should take affect immediately.

### **Enabling LinkedIn Share Plugin**

**Note:** You have to be logged into your hub in order to complete the following tasks.

1. Click the "Components" tab and then select the "Resources" button located in the drop-down.
2. On the Resources page, select the "Plugins" tab.
3. Click the title of the "Resources-Share" plugin.
4. Under the "Basic Options" section, enable the LinkedIn icon share plugin by changing the radio button to "Yes".
5. Click the "Save & Close" button to save the changes and navigate back to the Resources page.

# Support

## Overview

- [Tickets](#)
- [Messages](#)
- [Resolutions](#)
- [Abuse Reports](#)
- [Tag/Group](#)
- [Stats](#)
- [ACL](#)

## Tickets

Tickets

## Messages

To aid in responding to support ticket submissions, you may create custom message templates for frequently used responses. Example responses include a "Ticket resolved" message sent upon closing a ticket or a "Request for more information" message.

Messages may also includes placeholders where information that changes can be specified. For instance your message template may include references to the specific ticket ID number or site name. A "Ticket resolved" template could look like this:

Thank you for using the {sitename}, and for reporting this problem. We believe that your issue (ticket #{ticket#} in our system) has been resolved. If you continue to have problems please let us know. You may reopen a closed issue at any time by following the link at the end of this message and adding a comment to the ticket.

Thank you for helping us to improve {sitename}!  
--the {sitename} team

Here we have two placeholders: {ticket#} and {sitename}. The placeholders are replaced with their current value at the time of composition. When chosen from the select box under "Comments" of the response form, the comments text box will be filled with the following:

Thank you for using the YourHUB, and for reporting this problem. We believe that your issue (ticket #123 in our system) has been resolved. If you continue to have problems please let us know. You may reopen a closed issue at any time by following the link at

the end of this message and adding a comment to the ticket.

Thank you for helping us to improve YourHUB!  
--the YourHUB team

## Resolutions

Resolutions

## Abuse Reports

Abuse Reports

## Tag/Group

Tag/Group

## Stats

The stats page gives a basic overview of support ticket activity starting at the beginning of a chosen year, defaulting to the current year if none specified.

The following data is shown:

- Tickets opened for the given year
- Tickets closed for the given year
- Tickets opened for the current month of the year
- Tickets closed for the current month of the year
- Tickets opened for the current week of the year
- Tickets closed for the current week of the year
- Open tickets
- Unassigned tickets
- Average ticket lifetime
- A list of administrators and the number of tickets closed
  - closed for the given year
  - closed for the current month of the year
  - closed for the current week of the year
- A line chart displaying Tickets Submitted (red) vs. Closed (green) on a monthly basis

Stats shown may also be filtered by group.

## ACL

The ACL (Access Control Layer) works in conjunction with a user login system to allow or deny a user access to support tickets and various information or features of a ticket.

Permissions may be set for individuals or entire groups of users. All members of a group will inherit any permissions set for the group. If a user is a member of multiple groups with ACL settings, the highest permissions will take affect. Take, for example, the following group settings:

Table 1: ACL

		Tickets			Comments		Private Comments		
Object	Model	Read	Update	Delete	Create	Read	Create	Read	
dev (111)	group	yes	yes	yes	yes	yes	yes	yes	yes
support (222)	group	yes	no	no	no	yes	yes	no	no

If user "john" is a member of both groups, his permissions will result as follows:

Table 2: Resulting permissions

		Tickets			Comments		Private Comments		
Object	Model	Read	Update	Delete	Create	Read	Create	Read	
john (333)	user		yes	yes	yes	yes	yes	yes	

Individual ACL settings take precedence over any other settings. Once again, take the following two groups and their permissions settings. User "john" is a member of both groups. We then add specific permissions settings for "john":

Table 3: ACL

		Tickets			Comments		Private Comments		
Object	Model	Read	Update	Delete	Create	Read	Create	Read	
dev (111)	group	yes	yes	yes	yes	yes	yes	yes	yes
support (222)	group	yes	no	no	no	yes	yes	no	no
john (333)	user	no	no	no	no	no	no	no	no

The ACL in table 3 will result in the following permissions for user "john":

Table 4: Resulting permissions

		Tickets			Comments		Private Comments		
Object	Model	Read	Update	Delete	Create	Read	Create	Read	
john (333)	user		no	no	no	no	no	no	

**Note:** A user will always have read access to tickets they submitted or are assigned to. This will

## HUB MANAGERS

---

even override any specific ACL settings.

# Tags

## Overview

Tags are like keywords or category labels. Tags help you categorize and find content, events, and members which have something in common or similar interests. Tags can be added to groups, profiles, resources, wiki pages, and events.

To manager tags:

1. First login to the administrative back-end.
2. Once logged in, find “Components” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing a list of your installed components.
3. Choose “Tags” from the available options.

## Creating a Tag

1. Click “New” (green circle with a plus sign) in the upper right portion of the page.
2. You will be presented with a form to enter your new tag. Only the field labeled “Tag” is required.

**Admin**

This is a flag that designates if a tag is an administrative tag. Admin tags are only seen by administrators and are typically used for tagging content with information that may not be relevant or desired to be known by front-end users.

**Tag**

The tag you wish to create.

**Alias**

An alternate version of the tag such as a pluralized spelling of the tag or common abbreviation. For example, the tag “New York” may have an alias of “ny”.

**Description**

A description or definition of the tag.

3. Once you feel ready to save your changes, scroll back to the top of the page and click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page.

### **Editing a Tag**

To edit a tag, click the raw tag, tag, or alias found in the tag listing.

All other steps are identical to tag creation.

### Merging Tags

Should a situation arise where two or more tags should really be one tag, you can merge tags. To merge tags, check the box next to the tags you wish to merge and hit the “merge” button in the toolbar located at the top right of the page.

You will then be presented with a list of the tags you want to merge (and how many items are using each tag) and the options to either:

- Merge the tags under another existing tag (ex: everything tagged with “h2o” and “hydro” can be merged to just “hydro”) or
- Merge the tags into a new tag (ex: everything tagged with “h2o” and “hydro” can be merged to “water”)

Click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page to perform the final merge. **Note:** This cannot be undone!

### Deleting Tags

To delete one or more tags, check the box next to the tag(s) you wish to delete and hit the “delete” button in the toolbar located at the top right of the page.

# Tools

## Changing the Developer URL

When accessing a tool's development page, there is a link available under the "What's next?" section on the right-hand side of the page (see the sample image below). This link should direct the user to the [yourhub.org/tools](https://yourhub.org/tools) page corresponding to that particular hub. But if that is not the case, the link can be changed quickly from the backend administrator interface; simply follow the instructions below.

Begin by...

1. Logging into the *Joomla!* administrative interface corresponding to your site
2. Then, navigate to "Components -> Tools" from the main menu bar on the top of the screen
3. Next, select parameters from the top-right corner of the page

## HUB MANAGERS

---

5. Locate the "Developer URL" field and ensure that it reads <https://yourhub.org/tools>

6. Select "Save" from the top-right corner

## Wiki

## Wishlist

# Resources

## Approving Pending Resources

Depending on whether auto-approval for user-submitted resources on a hub is turned on/off, you may need to watch for newly submitted resources awaiting for administrator approval to be published on the hub. The administrative dashboard shows whether there are any resources pending approval.

In the screenshot above, the dashboard says there are 49 pending resources. By clicking on the link “49 pending resources”, you will be immediately taken to the resource manager. Resources that need your approval will be marked with a distinct icon as seen in the screenshot below.

## HUB MANAGERS

---

You can publish a pending resource just by clicking on the orange status icon, or you can first click on the resources title and select appropriate status from the detailed resource page, as shown on the screenshot below.

From the detailed resource page you can also decide when the resource should get published and unpublished by setting Start Publishing and Finish Publishing dates. As soon as a new resource is published, it will appear in site search as well as in What's New area of the site.

# Tools

## Contribtool

Contribtool is the process that manages the publishing process for tool resources on the hub. There are nine states of a tool within Contribtool:

Each state is associated with a set of tasks that either the tool developer or the hub administrator must perform. We will refer to tasks the tool developer must perform as "user tasks", and tasks the hub administrator must perform as "admin tasks".

## Preparation

To accomplish many of the admin tasks, the user acting as the admin must be a part of the "apps" group. To be added to the "apps" group:

1. Login to the hub's administrative back end and find the "Groups" component.

## HUB MANAGERS

---

2. Type "apps" into the search box.
3. Click on the number under the column "Total Members"

4. Type the admin's username into the Add input box, choose "Members" from the drop down menu, and push the "Add users" button.

## Registering a Project

HUB MANAGERS

The first step in Contribtool is for the tool developer to register the tool by filling out the tool contribution form. This is a user task. Go to the web page <https://yourhub.org/contribute> (substituting "yourhub.org" with the name of your hub). Use the "Getting Started" button in the upper right side of the web page to start the contribution process. On the left side of the web page, a list of contribution types will be shown. Choose the TOOLS contribution type.

The tool registration form will be presented. The form asks for some basic information regarding the name of the tool, a short description of the tool, and who can access the source code repository. There are also fields available to add restrictions on who can run the tool once it has been published, and who can access the Trac project area. All of the information on this page can be changed at a later date, except for the tool name. Once the tool name has been registered, it cannot be changed, so pick a good one. When the registration form has been completed, push the "Register Tool" button at the bottom of the page, and the state of the tool will be changed to "Registered"

### Registered to Created

Once the tool has been registered by the tool developer, it is up to the administrator to create the project. Creating the project is an admin task. Start by going to the web page <https://yourhub.org/contribtool>. This page lists out all tool contributions on the hub. Tools that require administrator attention are highlighted. If a tool has been registered by a tool developer, but there are no tool contributions listed on the Contribtool web page, there may be a privileges related error. Make sure the administrator account being used is a member of the "apps" group. Instructions on how to do this are in the section labeled "Preparation".

The newly registered project should be highlighted on the Contribtool web page. Choose this project by clicking on the tool name, which is a link to its tool status page. The tool status page contains the tool information that the developer provided on the registration form and a set of Developer Tools on the left side of the web page. On the right side of the web page, the "What's next?" status is provided, which gives information regarding the steps that need to be completed before the tool can be published on the hub. Any tasks that have been checked off have been completed. Tasks that have an arrow next to them are tasks that can be completed now.

Special for the administrator, there is a section of "Administrator Controls" on the left side of the page, under the Developer Tools. To create the tool project, the admin must press the link labeled "Add Repo". This starts a process that creates a Subversion source code repository, Trac project wiki pages, and sets up access for the tool for the users listed on the development team. When the process has completed, the results are displayed for the administrator to see. A green box generally means nothing catastrophic has happened and the tool project has been successfully created. In the case something fails, a red box will be displayed listing the errors encountered. Running the process multiple times by repeated presses of the "Add Repo" link generally has no harmful effects, in that if the pieces of the project area already exist, they will not be overwritten, and if they do not exist, they will be created.

The last step to creating the tool project area is to flip the status of the project from Registered to Created and pressing the "Apply change" button at the bottom of the Administrator controls.

### **Created to Uploaded**

After the tool project has been created, the tool developer needs to upload their tool source code into the source code repository. This is a user task. Instruction listing out the commands involved with upload source code to the project's source code repository are easily accessible from the tool status page in Contribtool. Start by accessing the Contribtool web page <https://yourhub.org/contribtool>. Find the tool project on the Contribtool web page, and click on the tool project's name. This is a link which leads to the tool status page. While in the Created state, the "What's next?" section on the right side of the web page contains a link to the instructions. We will review the requirements for installing a tool in the HUB environment and the process of doing so.

There are four requirements for installing a tool in the HUB environment:

1. Source code
2. Graphical User Interface
3. Makefile
4. Invoke script

Source code includes all files related to running the application with the tool.xml and possibly a wrapper script as the exceptions. Source code is needed as a part of the installation process. No binaries from the source code of the application should be stored in source code repository. It is alright to store binary data files, like images, in the source code repository, but in most other cases, storing binaries from the application instead of the actual source code leads to future compatibility problems, even when the binaries claim to be platform independent.

## HUB MANAGERS

---

All tools need a graphical user interface. There are several toolkits available including Qt, GTK, wxWidgets, and Tcl/Tk. If your tool does not already have a graphical user interface, we suggest using Rappture (<http://rappture.org>). With Rappture, you can quickly develop a graphical user interface that can guide users through the process of running the tool and viewing results, all in one application. Rappture also include many hooks into the HUB infrastructure, which makes it a great choice for tool developers.

All tools need a Makefile. The Makefile holds the instructions for compiling and installing binary files. Even tools that do not have source code that needs to be compiled still need a Makefile.

## HUB MANAGERS

---

All tools need an invoke script. Invoke scripts hold details about how to launch to the tool in the HUB environment. Generally, invoke scripts are very simple, one line calls to the HUB invoke script with a few options.

While generating the source code and graphical user interface are outside of the scope of this tutorial, details will be given later regarding creation of a typical Makefile and invoke script.

There are eight steps related to uploading source code to the source code repository.

1. Checkout a copy of the tool's source code repository.
2. Add source code to the src directory of the tool's repository.
3. Add a Makefile in the src directory of the tool's repository.
4. Add tool.xml to the Rappture directory of the tool's repository.
5. Check the middleware/invoke script.
6. Test the code in the workspace.
7. Clean the directories before committing.
8. Commit the changes from the local copy of the repository.

All of these steps can be performed from within the workspace.

The first step of uploading source code to the source code repository is to checkout a copy of the tool's source code repository. This can be done by using the svn checkout command.

## HUB MANAGERS

---

```
svn checkout https://yourhub.org/tools/toolname/svn/trunk toolname
```

In the example, replace "yourhub.org" with the name of the hub hosting the tool's source code repository. Also, substitute the term "toolname" with the shortname of the tool. Executing this command will download a copy of the tool's source code repository from the repository server, hosted on "yourhub.org", and place the copy on the machine where the command was executed. If the command was executed inside of a workspace, the copy of the tool's repository server will be made inside of the workspace. This copy will be referred to as the local copy of the tool's source code repository. The local copy of the repository will be stored in a directory, with the name substituted for "toolname".

The second step of uploading source code to the source code repository is to add source code to the src directory of the tool's repository. This can be done with the svn add command. This step involves (1) changing directories into the local copy of the repository, here referred to as toolname, (2) copying source code files into the src directory, and (3) lastly using the svn add command to notify the local repository that files need to be added to the source code repository.

## HUB MANAGERS

---

Line	Example:
1	<code>cd toolname</code>
2	<code>cp /apps/rappture/examples/zoo/curve/curve.tcl src/curve.tcl</code>
3	<code>svn add src/curve.tcl</code>

All files will need to be added to the source code repository. They can be done one by one, as shown above, or by directory.

The third step of uploading source code to the source code repository is to add a Makefile to the src directory. The `svn add` command will be used to complete this task. If a Makefile does not exist, one can easily be created using a text editor. In the workspace, the `gedit` program is a convenient text editor. From within the `toolname` directory, issue the command:

```
gedit src/Makefile
```

If no Makefile exists, add the following text to the file.

```
Line      Example:
 1      all: curve.tcl
 2
 3      install: curve.tcl
 4          install --mode 0644 -D curve.tcl ../bin/
 5
 6      clean:
 7
 8      distclean: clean
 9          rm -f ../bin/curve.tcl
```

In this example, the source code is a single tcl script named `curve.tcl`. Since the source code does not need to be compiled in this case, the "all" target is empty. If there was source code to be compiled, line 2 would be tabbed in once and include a compile line like `"gcc -o curve curve.c"`. The install target, starting on line 3, is responsible for installing the executables and related scripts into the `../bin` directory. Executables should be placed in the bin directory. Line 4 is the action of the install target. It uses the shell program named "install" to move the files from the src directory to the bin directory, and appropriately set the permissions of the file. The clean target, on line 6, is responsible for removing files temporary files, usually left over from compilation. The distclean target, on like 8, calls the clean target from line 6, and then removes the tcl script that was placed in the bin directory by the install target. The distclean target is responsible for removing any files that were generated be install target. After running the distclean target, the local repository should be in the same state as when it was first checked out.

Once the Makefile has been created, save the file and exit the gedit program. Lastly run the `svn add` command on the file `src/Makefile` to add it to the local copy of the source code repository.

The fourth step of uploading source code to the source code repository is to add the `tool.xml` file to the Rappture directory. To add the `tool.xml` file to the local copy of the source code repository, first copy the file into the Rappture directory, then use the `svn add` command to notify the local copy of the repository that a file needs to be added.

## HUB MANAGERS

---

Line	Example:
1	<code>cp /apps/rappture/examples/zoo/curve/tool.xml rappture/tool.xml</code>
2	<code>svn add rappture/tool.xml</code>

The fifth step of uploading source code to the source code repository is to check the `middleware/invoke` script. Inside of the `middleware` directory, there should exist a file named `invoke`. If the file does not exist, use `gedit` to create it, then add it to the repository using the `svn add` command, just as was done for the `Makefile` in step 3. The `invoke` script is responsible for setting up the tool environment and launching the tool when a user clicks the `Launch` button from the tool resource page. The default `invoke` script looks like this:

Line	Example:
1	<code>#!/bin/sh</code>
2	
3	<code>/apps/rappture/invoke_app "\$@" -t toolname</code>

## HUB MANAGERS

---

In the example above, the invoke script calls the HUB invoke script located at `/apps/rappture/invoke_app`. On older hub setups, `/apps/rappture/invoke_app` is a file that only supports launching rappture applications. On newer hub setups, `/apps/rappture/invoke_app` is a link to `/apps/invoke/current/invoke_app`, which is capable of launching all rappture applications and a majority of non-rappture applications.

The `invoke_app` script accepts a number of flagged options. Some of the more popular ones include:

```
-r Rappture version (current, dev)
-t tool name
-T tool root directory
-e environment variable to set
-p add a path to the PATH environment variable
-C command to launch the tool
-A additional arguments to add to the command for launching the tool
-c commands to start in the background before launching the tool, like filexfer
```

The example above takes advantage of the `-t` flag to tell `invoke_app` that the name of the tool is "toolname". The `invoke_app` script contains more details about the available flags and how to use them.

The last task of this step is to ensure the middleware invoke script has execute permissions. This is accomplished by using the shell's `chmod` command:

```
chmod 755 middleware/invoke
```

The sixth step of uploading source code to the source code repository is to test the tool in a workspace. If the tool runs properly in a workspace when started from an invoke script, it is very likely that it will run properly when installed in the hub environment. Testing the code in the workspace also exercises the Makefile and invoke script, ensuring they are also functioning properly. Here are the commands:

## HUB MANAGERS

---

Line	Example:
1	<code>cd src</code>
2	<code>make all install</code>
3	<code>cd ../</code>
4	<code>./middleware/invoke -T \$PWD</code>

In the above example, the code is compiled and installed by (1) changing directories into the `src` directory, and (2) issuing the command "make all install". The shell command "make" looks for a file named `Makefile`, and runs the targets specified as its arguments. In this case, it runs the `all` and `install` targets. Next (3) change directories back to the tool's root directory and run the `middleware/invoke` script, providing the option "`-T $PWD`". Recall from earlier, the `-T` option specifies the tool root directory. The `$PWD` environment variable holds the present working directory, which in this case also happens to be the tool's root directory. When the Rappture GUI appears, press the simulate button to make sure the tool runs correctly.

It is important that this step is successfully completed by the tool developer. This is the same sequence of events that the administrator will do when installing the tool in the HUB environment. Any failures encountered while running this step will most likely be encountered again when installing the tool in the HUB environment, so they should be resolved prior to changing the tool status to `Uploaded` in `Contribtool`.

The seventh step of uploading source code to the source code repository is to clean up the local copy of the repository before committing. This will again utilize the `Makefile` located in the `src` directory. Here are the commands:

## HUB MANAGERS

---

Line	Example:
1	<code>cd src</code>
2	<code>make distclean</code>
3	<code>cd ../</code>

Earlier the Makefile was setup with a `distclean` target to clean up all files generated from the installation of the tool's source file. In this example, the `distclean` target of Makefile is called to do the cleanup of the previous install. It is important to clean up the repository before committing to avoid placing unnecessary binary and other temporary files into the source code repository stored on the repository server.

The eighth and last step of uploading source code to the source code repository is to commit the changes from the local copy of the repository to the repository server. This is accomplished by using the command `svn commit`. The `svn commit` command accepts the `--message` flag along with a message. With every commit to the repository, a message should be included detailing what is being committed. This will help later when searching for specific versions of the tool in the source code repository. Commits can be made from any directory in the local copy of the repository, but will only include files and directories underneath the present working directory. For this reason it is usually convenient to commit from the local copy of the repository's root (top) directory. Here is an example commit command with a message:

## HUB MANAGERS

---

```
svn commit --message "initial upload of code"
```

After issuing the svn commit command, a prompt may appear requesting a username and password. Enter the username and password credentials for the HUB hosting the tool's source code repository.

Once the tool's source code has been uploaded to the repository server, the tool's Contribtool status can be changed to Uploaded. Go to the tool's status web page in Contribtool, it can be found through the Contribtool web page:

<https://yourhub.org/contribtool>.

To make sure the source code was successfully committed, use the Timeline link under the Developer Tools section on the left side of the web page. The Timeline link will open a web page with the tool's project area. Note that the tool's project area may have restricted access that requires the user to login. The timeline lists out the most recent changes to the source code repository. The most recent changes for uploaded code should be listed at the top. Make sure the uploaded code is listed in the Timeline.

Back on the tool's status web page in Contribtool, there should be a "We are waiting for You" section under the "What's next?" section on the right side. When ready to change the status of the tool from Created to Uploaded, click the link labeled "My code is committed, working and ready to be installed". Clicking the link will change the status.

### **Uploaded to Installed**

Once the tool has been uploaded by the tool developer, it can be installed in the HUB environment. This is an admin task. Navigate to the tool's status web page in Contribtool. Under the Administrator Controls section, on the left side of the web page, will be a link labeled Install. Clicking the Install link will start the installation background process which performs an svn checkout of the tool's source code repository into the /apps directory. The next step requires that the administrator login to the system, become the "apps" user, and compile the code. This can all be accomplished within a workspace.

## HUB MANAGERS

---

Inside of a workspace issue the following commands in an xterm:

Line	Example:
1	<code>sudo su - apps</code>
2	<code>cd /apps/toolname/dev/src</code>
3	<code>make all</code>
4	<code>make install</code>

Become the apps user by using the shell's sudo command. If there are errors while becoming the apps user, go back to the beginning of this tutorial and ensure the login account being used is a member of the "apps" group. Change directories to the tool's installed dev directory, /apps/toolname/dev. Inside of the src directory, run the "make all" and "make install" commands to compile and install the code.

When the source code has been compiled and installed, go back to the tool's status page in Contribtool, flip the status from Uploaded to Installed, and press the Apply change button. Pressing the Apply change button will update the tool status web page.

## HUB MANAGERS

---

On the updated page, a Launch tool link will be made available, on the right side of the page, in the "What's next?" section. Click the Launch tool link and verify that the tool properly launches and runs.

**Installed to Updated**

It is the tool developer's responsibility to test the operation of the tool and validate that it generates acceptable results. The tool developer may find an error or otherwise needs to update the code in the source code repository and have the tool reinstalled. Updating the tool is a user task. Any new changes to the tool should be committed to the source code repository. Next, the tool's status in Contribtool should be changed to the Updated state. Changing the status will notify the administrator that the tool is ready to be installed again.

### **Installed to Approved**

When the tool developer feels the tool is working properly, the approval process can be started. Tool approval is a user task. To approve a tool, the tool information page must be created. The tool information page is the web page listing the authors of the tool, credits, publications, and screen shots. To create the tool information page. Click the "Create this page" link in the "What's next?" section on the tool status page in Contribtool.

## HUB MANAGERS

---

During the process of creating the tool information page, the necessary information will be collected and formatted. At the end of the process a preview page will be provided. The tool developer will need to confirm the layout and information on the preview tool page.

The tool developer will also need to choose a license under which the project will be published. Be sure to replace the template text in the license with the appropriate information.

Finally, approve the tool by pushing the button labeled "Approve this tool". The status on the tool's status page in Contribtool will automatically be updated.

### **Approved to Published**

To publish a tool in the Approved state, the administrator must click the Publish link in the Administrator Controls on the tool's status page in Contribtool. This is an admin task. Clicking the Publish link updates the database, exposing the tool information page on the HUB. From the tool information page, the tool can be launched using the Launch tool link. The Publish link will

## HUB MANAGERS

---

run the publishing process and return the results to the administrator. Similar to the Installed state, successful completion will result in a green box with results. Failure will result in a red box with errors. After the results have been presented, flip the status from Approved to Published. and press the Apply change button.

**Published to Updated**

When the tool developer is ready to start testing a new release of the tool, they will commit all changes to the source code repository, and change the status on the tool's status page in Contribtool, from Published to Updated. Changing the status from Published to Updated does not unpublish or otherwise change the state of the already published tool. Changing the status will notify the administrator that the tool needs to be reinstalled. From here, the Install-Approve-Publish cycle continues.

### **Published to Retire**

The tool developer has the option of retiring a tool. Generally, published tools are not retired, and live in perpetuity. Changing the status from Published to Retired places the tool in a state where nobody can run it from the tool information page. The tool information page will still exist, as a placeholder for the previously published resource.

## Support Tickets

## Abuse Reports

## Store Orders

# Site Notices

## Overview

1. First login to the administrative back-end.
2. Once logged in, find “Extensions” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as “Module Manager”, “Plugin Manager”, etc.
3. Choose “Module Manager” from the available options.
4. You should now be presented with a list of all the modules installed on your site. There are a variety of methods to find the specific module you wish to edit: you can filter by selecting position, type, or even state (enabled, disabled). The site notice module would be in position “notices” and of type “mod\_notices”. You may also search for “notices” in the filter search box or scroll to the bottom of the page and navigate your way through the entire list. Once found, click the module name to edit it.

5. Once in edit mode you will be presented with some options such as the title, position, etc. Typically, you will not need to edit anything found in the “Details” section. The items that will most often be changed are under “Parameters”. Here you can set the following:

**Start Publishing**

This determines when you wish the site notice to *start’ showing on the site*.

**Finish Publishing**

This determines when you wish the site notice to *stop* showing on the site.

**Alert Level**

3 levels available: low, medium, and high. This determines the appearance of the site notice (such as eye-catching red for “high”).

**Module ID**

A CSS ID to be applied to the module. Typically, you will not need to change this.

**Message**

The notice you wish to display.

**Important!** The “Position” must be set to “Notices”, otherwise the banner will not show up, or it will not show up where you intended it to.

6. Once your parameters are set, move down to the “Menu Assignment” portion. This section determines what pages of your site you wish the notice to appear on. This will typically be set to “All”.

**Important!** If the menu assignment is set to “none”, your notice will NOT appear on any page of the site, even if it is published and the timeframe is within the publishing window set in the “Parameters” section.

7. Return to the top of the page and click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page.

# Scheduled Tasks

## Overview

A cron component is available for managing and running scheduled tasks for your hub.

The Cron Job Manager can be found by selecting "Components" > "Cron" from the drop-down menu on the back-end of your HUB installation.

## What is cron?

Cron is the name of program that enables unix users to execute commands or scripts (groups of commands) automatically at a specified time/date. It is normally used for sys admin commands.

A hub has a specific cron job that calls to the CMS. From there the code executes a list of jobs that can be created, published/unpublished, modified, and deleted via the administrator interface.

## Create/Edit Jobs

When you create a new job, you will select the event to trigger. Each event calls to a specific plugin and performs its own set of tasks.

All jobs have two sections that are the same: Details and Recurrence. The Parameters are different for each event.

## Details

## HUB MANAGERS

---

### Event

This displays the system name of the module. No entry is allowed.

### Title

The Title of the Module.

### State

Whether or not the job is enabled. If "No", the job will not be run.

### Recurrence

This is how often a job should be run. Several common values are provided--such as "run once a day, midnight"--with the option to specify your own by selecting "custom" front he drop-down list.

## Recurrence

## Parameters

## HUB MANAGERS

---

This will vary between events.

# Categories

## Overview

Sections and categories in Joomla! provide an optional method for organizing your articles. Here's how it works. A Section contains one or more categories, and each Category can have articles assigned to it. One Article can only be in one Category and Section.

For example, you might have a Section called "Pets", and categories called "Dogs" and "Cats". Articles about dogs would be assigned to the "Dogs" Category, ones about cats the "Cats" Category. So an Article about dogs would be in the "Pets" Section and the "Dogs" Category. You could not have one Article that is in both the "Cats" and "Dogs" categories. To work around this, you could either (1) create a new Category called "Cats and Dogs" or (2) create a second Article to put in the second Category.

## Why Use Sections & Categories?

There are two main reasons you might want to organize your Articles in sections and categories.

### List and Blog Layouts

First, there are built-in Menu Item Types in Joomla! that take advantage of this organization. These are the Section Blog, Section List, Category Blog, and Category List. These Menu Item Types (also called "layouts") make it very easy to show articles that belong to sections or categories. As new articles are created and assigned to sections and categories, they will automatically be placed on these pages according to the parameters you set for each page.

For example, say you have a Section Blog layout for the "Pets" section, and say you have it set to order articles starting with the most recent one first. When you add a new Article to the "Pets" Section, it will automatically show on the "Pets" blog page as the first Article. You don't have to do anything other than add the Article and assign it to the "Pets" Section.

### Organizing Articles in Article Manager

If you will have a large number of articles on your site, a second reason to use sections and categories is to simply group the articles so you can find them. For example, in the Article Manager, you can filter articles based on Section or Category. So if you have 200 articles in your site, you can more easily find an Article if you know it's Section or Category.

## Sections and Categories vs. Menu Organization

It is important to understand that, just because Joomla! uses a 3-tier organization level for

articles (Section ? Category ? Article), this has nothing to do with the structure of the menus on your site. For example, your site could have one menu level or six menu levels.

### **Other Types of Categories**

There is also a potential for confusion about categories. Sections are only used for articles. However, categories are also used for other components, including Banners, Contacts, News Feeds, and Weblinks. These categories are completely different from Article categories and are set up in different screens in the back end of Joomla!. So when you see something about categories, it might refer to Article categories or it might refer to categories for these other components.

### **Creating a Section & Category Hierarchy**

Coming soon.

# Creating/Editing

## Creating an Article

1. First login to the administrative back-end.
2. Once logged in, find “Content” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as “Article Manager”, “Article Trash”, etc.
3. Choose “Article Manager” from the available options.

4. Then click the "New" toolbar button.

5. The New Article screen contains options for categorizing and naming the article, editing content and selecting parameters.

- Enter a title in the "Title" field. This is used when the article title is displayed.
- Enter an alias in the "Alias" field. The alias is used to refer to the title and is important for the URL of the page. If you do not enter anything Joomla! will generate it for you.
- Select a "Section" and "Category" using the drop down menus.
- Choose whether the article is published or not using the "Published" radio buttons.
- Choose whether the article will be displayed by the Frontpage component using the "Front Page" radio buttons.

6. You may also choose Parameters for the article. Click on each section to view the parameters and change the settings to suit your requirements.

7. Click the "Save" or "Apply" toolbar button to save your article.

- The "Save" toolbar button will save your changes and return you to the Article Manager screen.
- The "Apply" button will save your changes but leave you in the Article Edit screen.

### Editing an Article

1. First login to the administrative back-end.
2. Once logged in, find “Content” in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as “Article Manager”, “Article Trash”, etc.
3. Choose “Article Manager” from the available options.
4. You should now be presented with a list of all the content articles on your site. There are a variety of methods to find the specific entry you wish to edit: you can filter by selecting section, category, author, or even state (published, unpublished, archive). The about page should be in the section “about” and category “about”. You may also search for “About” in the filter search box or scroll to the bottom of the page and navigate your way through the entire list. Once found, click the article title to edit it.

5. You may then edit the page title, content, etc.

6. Once you feel ready to save your changes, scroll back to the top of the page and click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page.

### Adding an Image

Images are added to articles using the *Editor Buttons* below the content editor window in the Edit Article screen. Note: It is possible to insert images using the editor in Joomla! however this feature provides a simple way of inserting images stored in the *images/stories* directory of Joomla!

1. Open the Article for editing either by:
  - Click the **Content > Article Manager** menu item to go to the *Article Manager*, select the Article and click the *Edit* toolbar button.
  - Clicking the *Add New Article* button in the Control Panel.

- If logged in to the Front-end, you have appropriate permissions and are viewing the Article you wish to edit: Click the *Edit* toolbar button.
2. Choose where you would like your image placed in the flow of the text by moving the cursor and click the Image editor button at the bottom of the screen.
3. The Insert Image screen will open over the top of the Edit Article screen. Choose an image by clicking on it.
  - You may also move directory by clicking on the folder icons.
  - Use the drop down *Directory* field to quickly select a directory and click the *Up* button to go up a directory level.
4. Set the image properties as required:
  - **Image Description:** This becomes the **alt** attribute for the image, an important feature for accessibility and compliance with web standards.
  - **Image Title:** Used for the optional caption and also becomes the **title** attribute in HTML.
  - **Align:** Sets the image alignment. If left blank the align attribute is not set.
  - **Caption:** Enables the caption which displays the Image Title below the image.
5. Click the *Insert* button to insert the image. The Insert Image screen will close and the image will be displayed in the editor.
  - Click the *Cancel* button to leave the Insert Image screen.

### Uploading images using the Insert Image screen

You may also upload new images using the Upload section of the Insert Image screen.

1. Click the Browse button to open a file browser.
2. Select the image files you wish to upload. Click Open in the file browser to confirm the selection. Note: The file browser style and layout depends on the browser and operating system you are using.
  - To remove selected files before uploading click the red icon next to the listed files.
  - If you are uploading multiple files in batches you can clear the list of completed files by clicking the *Clear Completed* button.
3. The selected file(s) appear as a list at the bottom of the Insert Image screen. Click *Start Upload* to begin uploading files.
  - When the upload is complete a green tick will appear next to the file.
4. You may now select and insert the uploaded image as before.

# Metadata

## Overview

Metadata are data about data, for instance a description of a website. Metadata are important for search engines and are written in HTML. Exactly how important metadata are in the rating by search engines is debatable. However, metadata represent a good way to describe your website in short and precise words.

**Note:** Google does not use the keywords meta tag in web ranking. See [the following article](#) for details.

## Available Tags

If you check out the HTML source code of a Joomla! site, you will see the following meta tags in the top area:

```
<meta name="generator" content="Joomla! 1.5" />
<meta name="description" content="Joomla! - the dynamic portal engine
and content management system" />
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<meta name="robots" content="index, follow" />
<meta name="keywords" content="joomla, Joomla" />
```

Of these, the two attributes description and keywords can be set on an article-by-article basis.

### description

This description of site content is often displayed by search engines. You should pay special attention to this tag, since the user who has entered a search term often uses this information to make a decision of whether to visit a site or not. You can add further information about every individual page to the global description.

### keywords

Keywords are very important for a document. You should list the most important concepts of your website with them. Some search engines index keywords in particular. The individual words are separated by commas; several words can be entered between two commas with normal spaces in between. The keywords should be limited to a maximum of 1000 characters; more than that will not be read by the search engines. Note that the use of fewer keywords helps each individual word get a higher priority in the search engine. Deliberate carefully about which are the most often used keywords and which are likely to be searched for most. You can add more keywords to the global keywords for every individual page of your website.

## HUB MANAGERS

---

Each article may also specify, in its parameters, whether to include a title or author attribute.

### Show Title Meta Tag

This parameter will insert the following meta tag with the title of the article:

```
<meta name="title" content="Welcome to Joomla!" />
```

### Show Author Meta Tag

This parameter will insert the following meta tag with the author of the article:

```
<meta name="author" content="Administrator" />
```

# Archiving

## Archiving an Article

Archiving is useful if you publish a lot of articles and which you still want to be published on the site, but have been displaced in priority by new ones.

1. Login to the Joomla! Administrator Back-end.
2. Go to "Content" ? "Article Manger" on the toolbar menu.

3. Check the box next to the article you want to archive.

4. Then click "Archive" button.

### Unarchiving an Article

1. Login to the Joomla! Administrator Back-end.
2. Go to "Content" ? "Article Manger" on the toolbar menu.
3. Check the box next to the article you want to unarchive.

4. Then click "Unarchive" button.



# The Home Page

## Setting a Home Page

The home page is determined by a "default" menu item that has been marked as the default.

If you wish to change the current home page to a different article, you must add the desired article to the default menu and mark it as "default".

## Edit

First login to the administrative back-end.

Once logged in, find "Content" in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as "Article Manager", "Article Trash", etc.

Choose "Article Manager" from the available options.

## HUB MANAGERS

---

You should now be presented with a list of all the content articles on your site. There are a variety of methods to find the specific entry you wish to edit: you can filter by selecting section, category, author, or even state (published, unpublished, archive). The home page should **not** be in a section or category (uncategorized). You may also search for the title of your home page in the filter search box or navigate your way through the entire list. Once found, click the article title to edit it.

The home page may look a little different than other pages you've edited, such as the "About" page. Some of the content you see on the front page doesn't appear to be in the page you're editing! This is because the home page embeds modules to output some of its content. This is done with {xhub} tags:

```
{xhub:module position="frontLeft" }
```

You may assign multiple modules to a position. The {xhub} tag will output **all** active (published) modules assigned to the position specified. The style attribute determines if the module(s) should be wrapped in a containing div or not and is optional.

**Note:** The animated banner and welcome message on the front page are also modules and managed through Joomla's "Module Manager" found under the "Extensions" menu item.

Once you feel ready to save your changes, scroll back to the top of the page and click "Save" (the icon that looks like a floppy disk) in the upper right portion of the page.

### Welcome

The "welcome" text, typically found to the right of the Flash banner on the home page is a module. To edit this module (or any module):

First login to the administrative back-end.

Once logged in, find "Extensions" in the main menu bar located toward the top of the page. You should be presented with a drop-down menu containing items such as "Module Manager", "Plugin Manager", etc.

Choose "Module Manager" from the available options.

## HUB MANAGERS

---

You should now be presented with a list of all the modules installed on your site. There are a variety of methods to find the specific module you wish to edit: you can filter by selecting position, type, or even state (enabled, disabled). The welcome module would be in position “welcome” and of type “mod\_custom”. You may also search for “welcome” in the filter search box or scroll to the bottom of the page and navigate your way through the entire list. Since modules are alphabetically sorted by their position by default, “welcome” will most likely be on the last page of results. Once found, click the module name to edit it.

Once in edit mode you will be presented with some options such as the title, position, etc. To edit the actual content of the module, scroll down until you see a large text area called “Custom Output”.

## HUB MANAGERS

---

Edit the HTML/text to be outputted.

Scroll back to the top of the page and click “Save” (the icon that looks like a floppy disk) in the upper right portion of the page.

Your changes should now be applied and immediately viewable on the front page.

# Content Modifiers

## Loading Modules in Articles

Modules may be loaded in an article by including a specific {xhub:module} tag. This tag requires one attribute: position, which specifies the position that you wish to load. Any modules assigned to the specified position (set via the administrative Module Manager) declared in the position attribute will have their output placed in the article in the location of the {xhub:module} tag.

```
{xhub:module position="footer"}
```

**Note:** To use this feature, the xHUB Tags plugin for content must be installed and active.

## Including CSS or JavaScript

Sometimes we need to load a stylesheet or script for a specific article. HUBzero allows this through the use of the xHUB content plugin. CSS and JavaScript may be loaded in an article by including a specific {xhub:include} tag. This tag has a few attributes, each with multiple options:

type

Required. Determines what sort of file to be included. Accepts "script" or "stylesheet".

filename

Required. The name of the file to be included.

component

Optional. The name of the component the file is to be included from. If not specified, the file will be included from the template's directory.

```
<!-- A stylesheet called "home.css" from the current template's /css folder -->
```

```
{xhub:include type="stylesheet" filename="home.css" }
```

```
<!-- A script called "resources.js" from the com_resources component -->
```

```
{xhub:include type="script" filename="resources.js" component="com_resources" }
```

**Note:** To use this feature, the xHUB Tags plugin for content must be installed and active.

### Outputting Hub Configurations

Sometimes we need to output the value of a specific hub configuration setting. HUBzero allows this through the use of the xHUB content plugin. HUBzero based configurations (**not** Joomla!) may be loaded in an article by including a specific {xhub:getCfg} tag. This tag has one attribute: the name of whatever configuration variable you wish to output.

```
{xhub:getCfg hubShortName}
```

**Note:** To use this feature, the xHUB Tags plugin for content must be installed and active.

We also advise extreme caution when using this particular {xhub} tag.

See [Hub Configuration](#) for more information on what configurations are available and how to set them.

### Getting The Template Directory

Sometimes we need to include content (images, javascript, etc.) from the active template's directory. HUBzero allows this through the use of the xHUB content plugin. The name of the active template will be outputted in an article by including the templatedir xhub tag. This tag has no attributes.

```
  
<!-- outputs: -->  

```

**Note:** To use this feature, the xHUB Tags plugin for content must be installed and active.

### Deleting

#### Moving To The Trash

1. Login to the Joomla! Administrator Back-end.
2. Go to "Content" ? "Article Manger" on the toolbar menu.
3. Check the box next to the article you want to trash.
4. Then click "Trash" button. This will move the article to a trash bin so that it can be retrieved later if needed. It does not permanently delete the article.

### Permanently Deleting

1. If you want to make sure the Article is completely gone from the system (so no further roll back is available), go to "Content" ? "Article Trash" on the toolbar menu.
2. Check the box next to the article you want to delete.
3. Then click "Delete" button. This will permanently delete the article. Recovery is not possible after this action.

## HUB MANAGERS

---

**Note:** Articles in the Trash Manager are not the same as Archived Articles.

# Events

## What is an event?

Do you have an upcoming event that you would like to share with other hub users? The Events component allows you to submit the details of these events and share them with your community.

Note: Administrators must first log in to the backend of the hub in order to complete the tasks below.

## Creating an Event

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. In the Events Manager, select the **New** icon.
3. Fill in the title of the event.
4. Select the category of the Event.
  - **General**: an event is the broadest category for events.
  - **Workshop**: is an event that is a clinic for users.
  - **Seminar**: is an event that hosts a speaker or presentation.
  - **Meeting**: is an event similar to conferences.
5. Add a description in the Activity field that includes details about the event and include whom the event is intended for.
6. Fill in the location of the event, the website/url that pertains to the event or where event information is stored, and add tags to connect the event to tag topics.
7. Set the date and time of the event using the drop down calendar from the boxes. An event can last multiple dates as an expanded time frame. The time span of the event is calculated in military time.
8. Select the time zone that the event is held in for this helps set up the time frame of the event for users in different time zones.
9. If the event has registration, fill in the information in the registration section.
  - Select **Register by** date.
  - Enter contact email address. This is the email address to which registration forms will be sent.
  - If registration is restricted for the event (Invite Only), enter a password users must enter to gain access to the registration form into the Restricted field.
  - To choose certain registration fields for your event, select the Hide or Show icons by clicking on the radio buttons in the Registration Fields area.
10. Click **Save** to add the event to the Hub calendar. The event will be automatically published and will appear on the frontend.

### Editing an Event

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. In the Events Manager, locate the event that needs editing, and click the select the checkbox next to it.
3. Once the event has been selected, click on **Edit** icon to edit the content of an event.
4. Fill in the Event details, and then click **Save & Close** to save the changes.

### Deleting an Event

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. In the Events Manager, locate the event that needs editing, and click the select the checkbox next to it.
3. Once the event has been selected, click the **Delete** icon. The event will be permanently removed from the Hub.

### Unpublishing an Event

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. In the Events Manager, locate the event that needs to be unpublished.
3. In the **State** column, a green check mark icon indicates the event is currently published.
4. Click the green check mark icon in the state column of the event you'd like to unpublish.
5. The state column will now show a circle with a line through it icon, indicating that it has been unpublished.

### Viewing Event Respondents

If registration was set up for an event, a hub administrator can view the registrant information by logging into the backend.

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. In the Events Manager, find the event, and select the check box next to it.
3. Once the event has been selected, click on **View Respondents** button in the upper right.
4. Now all of the respondents to the Event can be viewed along with information that they filled out when they registered for the event.

### Adding a Page to an Event

1. On the backend, click the **Components** tab, and select **Events** from the drop-down menu.
2. On the Events Manager, click the **Events** tab and select the box of the event you are editing.
3. Once the event has been selected, click on **Add a Page**.
4. Add the details of the page for the event. Here extra information can be added to the event, including details of the event and key information for the participants.
5. Click **Save & Close** to save the new page to the event.

# Feed Aggregator

## What is the feed aggregator?

The Feed Aggregator is a component which allows feed managers to collect articles from several RSS feeds and to selectively combine them into one site-sponsored RSS feed.

Users must also be logged into the hub to see any of these controls.

## Adding a Feed Manager

In order to access the feed controls, a user must be added as a feed manager.

The feed aggregator controls are only available to those given either the Author, Editor, or Published role. Users must also be logged into the hub to see any of these controls.

1. Click on **Users Menu** and select **User Manager**.
2. Check the box next to the user whom shall be promoted.
3. In the drop-down, select the permission level as Author, Editor, or Publisher, for the user.
4. Once the group has been selected, click on the **Process** button to save the changes.
5. The user will now have access to sort posts from the feeds.

## Adding a Feed URL (RSS)

1. Navigate to the URL <https://yourhubname.org/feedaggregator>.
2. Click the **Add Feed** button in the upper right hand corner of the page.
3. Add the Feed Name, the Feed URL, and enter the description of the feed.
4. Click the **Submit** button to add the feed to the source feed collection.

## Retrieving and Managing Posts

1. Navigate to the URL <https://yourhubname.org/feedaggregator>.
2. Click the **Retrieve New Posts** button to pull new posts from the URLs that have been added to the Feed Aggregator. New posts will be added to the list.
3. Once new posts have been added to the list, manage the new posts by selecting approve, mark for review, or remove.

1. **Approve** - Add the post to the generated feed.
2. **Review** - Allow other managers to review the post before adding it to the generated feed.
3. **Remove** - Remove the post permanently from the collect posts.
4. Once a selection has been made from the three options the choice that was made the button will turn gray.
5. To change the selection, click one of the other options.

### Accessing the Feed URL

1. Navigate to **<https://yourhubname.org/feedaggregator>**.
2. To view the feed URL, click on the **Generate RSS Feed** button.
3. The aggregator link will be generated into a pop-up box with a blue highlighted link.
4. Copy the link into any readers that accept RSS feeds as input.

### Disabling a Feed

1. Navigate to **<https://yourhubname.org/feedaggregator>**.
2. Click the **View Feeds** button.
3. Locate the feed that is to be disabled.
4. Click the **Disable** button. It will then be disabled, and new posts will no longer be retrieved from the feed and added to the feed aggregator.

### Enabling a Feed

1. Navigate to **<https://yourhubname.org/feedaggregator>**.
2. Click the **View Feeds** button.
3. Locate the feed that is to be enabled.
4. Click the **Enable** button. Any new posts will be retrieved from the feed and added to the feed aggregator.

### Editing a Feed

## HUB MANAGERS

---

1. Navigate to **<https://yourhubname.org/feedaggregator>**.
2. Click the **View Feeds** button.
3. Locate the feed to be edited, and click the feed's **Edit** button.
4. Edit the content of the feed, and then click **Submit**.

# Forum

## What is a Forum?

A forum, or message board, is an online discussion area where people can hold conversations in the form of posted messages.

Forums have a specific set of jargon associated with them; e.g. a single conversation is called a "thread" or discussion.

A discussion forum is hierarchical or tree-like in structure: a forum can contain a number of sections, each of which may have several categories. Within a forum's category, each new discussion started is called a thread, and can be replied to by as many people as so wish.

## What is a section?

Sections are a way to organize or group related categories (topics). By default, sections are sequenced alphabetically by title.

## What is a category?

Forum categories are a simple way to group related threads or discussions together. When a category is locked, no new threads may be created within that category. Typically, a locked category will be indicated as such by a padlock icon.

## What is a thread?

A thread (sometimes called a discussion) is a collection of posts displayed from oldest to latest. A thread is defined by a title, an additional description that may summarize the intended discussion, and an opening or original post (common abbreviation OP, which can also mean original poster), which opens whatever dialogue or makes whatever announcement the poster wished. A thread can contain any number of posts, including multiple posts from the same members, even if they are one after the other.

**Note:** Users must be logged in to the hub in order to participate in the forum.

### Creating a Category

1. Navigate to the **Component** tab and click on **Forum**.
2. On the Forum component, select the **Category** tab and then click on the **New** button on the top of the page.
3. Fill in the title of the new category.
4. Fill in the alias or title that will be displayed in the URL.
5. Fill in the scope or site and the scope ID or site identification number for the new category.
6. Select the state of publish from the drop-down.
  - a. **Unpublished:** The category will be removed from the frontend Hub but available on the backend of the Hub.
  - b. **Published:** The category will be available of the frontend and backend of the Hub.
  - c. **Trashed:** The category will be removed from the Hub.
7. Select the access level from the drop-down.
  - a. **Public:** All visitors or users of the Hub can access the category.
  - b. **Registered:** Only registered users of the Hub can access the category.
  - c. **Special:** Only registered users with special permissions can access the category.
  - d. **Protected:** Only users with protected rights can access the category.
  - e. **Private:** No users besides the creator of the category can access the category.
8. The **Category** can be locked so that no new posts will be allowed by checking the box in **Details**.
9. Click **Save & Close** to save the new section and to return to the Forum dashboard.

### Creating a Section

1. Navigate to the **Component** tab and click on **Forum**.
2. On the Forum component, select the **Section** tab and then click on the **New** button on the top of the page.
3. Fill in the title, alias (URL ending), scope (site), and scope ID for the new section.
4. Select the state of publish (unpublished, published, or trashed) from the drop down and the access level (public, registered, special, protected, or private).
5. Click **Save** to remain on the **Forum: New Section** edit page or click the **Save & Close** to save the new section and to return to the Forum dashboard.

### Creating a Discussion Thread

1. Navigate to the **Component** tab and click on **Forum**.
2. In the Forum component, select **Threads**.
3. Click the **New** icon.
4. Fill in the title, alias (URL ending), scope (site), and scope ID for the new section.
5. Select the state of publish (unpublished, published, or trashed) from the drop down and the access level (public, registered, special, protected, or private).
6. Click **Save** to create the thread.

### Deleting a Discussion Post

1. Navigate to the **Component** tab and click on **Forum**.
2. In the Forum component, find and select the Forum thread post to be edited by clicking the **Delete** icon.
3. The forum post will be automatically deleted and saved. Once a post is deleted, the material cannot be retrieved.

### Limiting Thread Viewing Access

(Note: You have to be logged into your hub in order to complete the following tasks)

1. Click the **Components** tab and then select the **Forum** button located in the drop-down.
2. On the Forum page, click the **Threads** tab.
3. Select the title of the thread and then click the discussion post's title.
4. Under the **Publishing Options**, selecting from the drop-down can change the **Access** of the discussion thread.
  - a. **Public:** All users or visitors to the Hub can view the discussion thread
  - b. **Registered:** Only logged in users can view the discussion thread
  - c. **Private:** Only certain members have access to the discussion thread
5. Save these changes by clicking the **Save & Close** button.

# GeoSearch

## How to Activate GeoSearch

GeoSearch is a component that allows users to view other members, organizations, events, and even job postings on one map. Users can scroll over each pin and click a link to view the pin in more detail.

1. Log into the administrator side of the Hub.
2. Go to **Extensions** and click **Plugin Manager** from the drop-down.
3. In the Plugin Manager search for **CRON - GeoSearch**.
4. Open the plugin and then enable the plugin.
5. Click **Save & Close** to save this change.
6. In the Plugin Manager search for **Geocode – Google Maps**.
7. Enable this plugin before moving on to the next step.
8. Navigate back to the main page of the administrative side of the Hub.
9. Go to **Components** and select **CRON** from the drop-down.
10. Inside of the component CRON, click the **Add** button in the upper right hand corner of the screen.
11. Select the **Event** of the new CRON job to be **Cron-Geosearch: Get Location Data From Sources** from the drop-down and then add the name of the new CRON job to match the name of the event.
12. Select the **Frequency** of the job to be **Once a day, midnight**.
  - a. This is suggested to prevent overrunning Google Maps API request limit.
13. To save this new job, click **Save & Close**.
14. Enable the new CRON job and then manually **Run** the job.
15. Navigate to the **GeoSearch** main page and refresh the page.

# Group Forum

## What is the Discussion Forum Email Digest?

The Discussion Forum Email Digest sends an digest email of the recent discussion forum posts at an interval chosen by the member.

## Configure the Groups Option

1. Navigate to **Groups** under the Members tab.
2. Click on the **Options** action button.
3. Click on the **Email Tab**.
4. Select "Yes" for the **Allow forum digest** parameter.
5. Select the **Save & Close** to save.

## Forum Email Digest

1. Navigate to the backend of a Hub and click on **Extensions**, then from the drop-down click **Plug-in Manager**
2. Search for **cron-forum** and **enable** the plug-in
3. Navigate to **Components** and from the drop-down click **Cron**
4. Click the **Create** button
5. Give the new Cron job a title and select the **Group Forum Email Digest** event, then make the frequency **Run once a day, midnight**
6. Then **Publish** the new Cron job and click **Save & Close**
7. Navigate back to the **Users** tab and select **Groups** from the drop-down
8. Click on **Options** and then click the **Email** tab
9. Look for "Allow forum digest" and change the answer to **Yes**
10. Click **Save** to finalize the process

**Note:** A user wants to receive the email digest then they must sign up to receive it. The user must go into a Group of their choice and click on the Forum tab. Inside of the Forum they will find an area called Email Settings. Click on the Change your settings link and from the pop-up check the box next to "Email me about new posts in this group and send me those emails..." then select the way in which they want to receive forum posts. They can have each post sent to them individually (individually as new posts are made) or they can receive an email digest of the

## HUB MANAGERS

---

posts (as part of a Daily/Weekly/Monthly email digest). Once a user has set up these terms, then they will start receiving digests based on their settings.

# Knowledge Base

## What is the knowledge base?

The knowledge base houses helpful articles and frequently asked questions. Hub managers can add their own hub specific articles to help their community understand how to use the features.

## Creating Knowledge Base Articles

1. Navigate to the **Knowledge Base** under the Component tab.
2. Select the tab **Articles**.
3. Select **New** to create a new article.
4. Select the category or sub category where the article will be located.
5. Fill in the title, URL alias, the body containing the article, and tags to connect the article for easy search.
6. Under **State**, select if the article is to be published to the Hub and the access level from the dropdown.
7. Select the parameters on what sections of the article that the users can view.
8. Select the **Save & Close** to save the new article.

# Newsletters

## Displaying Newsletters on the Hub

1. Log in to the backend of the Hub and navigate to the **Components** tab and then click **Newsletters**.
2. Locate the newsletter that is to be published to the Hub, and then select the newsletter.
3. Click **Edit** to open up the newsletter and inside the *Newsletter Details* go to **Show Newsletter on HUB**.
4. Choose from the drop-down **Show** to publish the newsletter to show on the frontend of the Hub.
5. Click **Save & Close** to save the new changes.

## Creating a Newsletter Template

1. Log in to the backend of the Hub and access the **Components** tab and then click on **Newsletters**.
2. Select the **Templates** tab and then click **New** to start a new template.
3. Type in the name of the new template.
4. Insert the primary title color, primary text color, secondary title color, secondary text color.
  - a. The colors are in HTML format. To find more colors and the related HTML codes, go here: <http://html-color-codes.info>.
  - b. Note: If you don't fill in HTML colors, black and gray default colors will be used.
5. Fill in the design by using HTML formatting to the template.
  - a. Use the suggestions on the side of the page to add content to the template.
6. Click **Save & Close** to save the new template design.

## Editing a Newsletter Template

1. Log in to the backend of the Hub and access the **Components** tab and then click on **Newsletters**.
2. Select the **Templates Tab** and then check the box to select the template that needs editing.
3. Click **Edit** to begin editing the material.
4. Click **Save & Close** to save the newly edited content.

### Deleting a Newsletter Template

1. Log in to the backend of the Hub and access the **Components** tab and then click on **Newsletters**.
2. Check the box to select the template that is going to be deleted.
3. Click **Delete** to permanently delete the template.
4. The template will then be removed from the Hub.

### Creating a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. Click on **New** to create a new Newsletter to send out to your users about new updates or news that is happening for the Hub.
3. Under *Newsletter Details* fill in the title of the Newsletter or **Name** and the alias, what appears in the URL, of the Newsletter.
4. Fill in the issue number of the Newsletter.
5. From the drop-down decide what email format the Newsletter will be sent in.
  - a. HTML: The Newsletter will be formatted with HTML coding. HTML emails will also auto build a plain text version to send along with the HTML version. This is primarily for avoiding being marked a spammer.
  - b. Plain Text: The Newsletter will be formatted with plain text and no coding.
6. Select the template of the Newsletter.
7. Select from the drop-down if the Newsletter is to show on the Hub right away.
  - a. You may want to hide private email newsletters or plain text email newsletters from showing on the Hub.
8. Select from the drop-down if the Newsletter is to track the emails.
  - a. Learn more about email tracking here: <http://kb.mailchimp.com/article/about-open-tracking>
9. Click **Save** to save the new changes and to add to the Newsletter the content.
10. Add the **Newsletter Mailing Details**.
11. Insert the main content of the Newsletter in the **Newsletter Primary Stories**.
  - a. Title: Title of the article
  - b. Order: Order of the Issue
  - c. Story: Content of the Newsletter
12. Insert the **Newsletter Secondary Stories** for content in the sidebar of the Newsletter. Fill in the same sections of content as the primary stories.
13. Click **Save & Close** to save all of the content and to finish the new completed Newsletter.

### Editing a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. On Newsletter main page, select the box beside the Newsletter that is going to be edited.
3. Click **Edit** to begin editing the Newsletter.
4. Click **Save & Close** to save the newly edited content.

### Deleting a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. On the Newsletter main page, select the box beside the Newsletter that is going to be deleted.
3. Click **Delete** to permanently delete the Newsletter from the Hub.

### Copying a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. On the Newsletter main page, select the box beside the Newsletter that is going to be copied.
3. Click **Copy** to copy the Newsletter selected.
4. The Newsletter and all its stories or content will be copied.

### Creating a Mailing List

1. Log in to the backend of the Hub.
2. Navigate to the **Components** tab and click on **Newsletters**.
3. Under the Newsletters, click the **Lists** tab.
4. Click the **New** button to start a creating a new mailing list.
5. Fill in the name of the mailing list, and then choose if the mailing list is going to be private or public.
  - a. **Private**: Must be invited to join list.
  - b. **Public**: All Hub visitors can view the mailing list and can choose to join the mailing list.

6. Fill in the description describing the purpose of this mailing list and indicate what types of mailings this list will receive.
7. Click **Save & Close** to save the basic details of the mailing list.

### Adding Emails to a Newsletter Mailing List

1. Log in to the backend of the Hub.
2. Navigate to the **Components** tab and click on **Newsletters**.
3. Under the Newsletters, click the **Lists** tab.
4. Select the mailing list that you would like to add emails to, then click the **Manage** button.
5. Inside the list, click **Add Emails** to add emails to the mailing list.
6. Determine if the user will be prompted into confirming the email or not having to confirm the email.
7. If all the emails are stored in an Excel file, upload the file and all the emails inside will be added to the list, or select the group from the Hub to add their emails to the mailing list.
8. If any extra emails need to be added to the mailing list, manually enter them into the *Enter Emails Here* text box. Leave a comma after each email.
9. Save the content by clicking **Submit**.

### Mailing Statistics Overview

1. Log in to the backend of the Hub and navigate to the **Components** tab and then click **Newsletter**.
2. Select the **Mailings** tab in the Newsletter component.
3. Select the newsletter the previously submitted mailings and then click **Stats** to access the statistical report collected from the mailing.
4. Inside the mailing statistics, you can view the follow details:
  - a. **Open Rate:** The percentage and total of viewers out of how many emails sent out.
  - b. **Bounce Rate:** The percentage of emails that bounced back, thus the user did not receive the email.
  - c. **Forwards:** The number of times viewers forwarded the Newsletter.
  - d. **Prints:** The number of times viewers printed off the Newsletter.
  - e. **Top Locations:** The top countries with the most Newsletter viewers.
  - f. **World Map:** A total count for each country highlighted on a global map of Newsletter viewers. Hover over each country to view the number of who opened the Newsletter.
  - g. **Click throughs:** The number of times views clicked a link in the Newsletter.

### Publishing a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. Under the **Newsletters** tab, select the box beside the Newsletter that is going to be published.
3. Click **Publish** to publish the Newsletter.
4. The Newsletter will appear on the frontend for all users to see.

### Un-publishing a Newsletter

1. Log in to the backend of the Hub and access the **Components** tab and then click **Newsletters**.
2. Under the **Newsletters** tab, select the box beside the Newsletter that is going to be unpublished.
3. Click **Unpublish** to unpublish the newsletter.
4. The Newsletter will then be unpublished from the Hub.

# Projects

## Enabling Plug-in to Projects

1. Login to the backend of the Hub and click on the **Extensions** tab.
2. Click on the **Plug-in Manager** under the **Extensions** tab.
3. Search **Projects- Databases** in the search field to locate the Data Store plug-in.
4. After locating the correct plug-in, check the box beside the **Plug-in Name**.
5. Click the **Enabled** button to allow the plug-in to be used on the frontend of the Hub.

## Restricting Plug-in to Specific Projects

1. Login to the backend of the Hub and click on the **Extensions** tab.
2. Click on the **Plug-in Manager** under the **Extensions** tab.
3. Search **Projects- Databases** in the search field to locate the Data Store plug-in.
4. After locating the correct plug-in, click on the title of the plug-in under the **Plug-in Name** column.
5. Inside the plug-in details, type in the names of the Projects in the **Restricted to projects** field.
6. Save the changes by click the **Save & Close** button.

## Uploading Large Files Using SFTP Clients

### Create a Local Password

1. If you use a non-Hub related account, then you must first create a local password
2. Login to the HUB
3. On the **Dashboard**, click **Account** on the left menu
4. Under **Local Password**, type in the password in the **New Password** and **Confirm password** text boxes
5. Click **Save**

### Setup SFTP Client

1. Download an SFTP client like Cyberduck or Filezilla
2. Add a new site by either clicking the “+” or “File” -> “Site Manager” -> “New Site”
3. Provide the following information

- a. Host: hubname.org
  - b. Protocol: Change to "SFTP"
  - c. User: Provide the same username used to login to the Hub
4. Click **Connect**
  5. When prompted for password, provide the local password that was created above
  6. Once connected, open up the "Data" file and then the "Projects" file and double click on the project that you would like to upload the files to
  7. Drag and drop the files into this folder and then check inside of the site and confirm that these files are uploaded to the right project

### Enable Grant Collection Information

If you are working on a Hub that will be creating projects based on grants, then you can enable a new step to be added in the Project creation to collect grant information. By collecting grant information for grant funded projects, project quotas can be increase based on the project budget and this information can help support annual reviews of the Hub. To enable this feature, follow these steps:

1. Navigate to the backend of the Hub
2. Hover over **Components** and from the drop-down click **Projects**
3. Click the **Options** button in the upper right corner of the screen
4. Inside of Options, click the **Setup** tab
5. Find the *Collect grant info at Setup* and change the drop-down to **Yes**
6. Click **Save & Close**

# Publications

## Curation Workflow

### Turning on Curation:

1. From the backend, navigate to **Components -> Publications**.
2. Click the **Options** button.
3. Click the **Curation** tab.
4. Select **ON** in the **Curation** field.
5. In the **Name of Group of curators** field, type in the CN of the group you want to give curation rights to.
6. Optionally, select 1 month in the **Grace period for changes** box if needing to give users the ability to change the publication after it has been published.
  1. **Note:** mkAPI will not run until the one month grace period if set.
7. Click **Save & Close** to ensure the changes and are submitted.

### Auto-Approve Publications

If you would like certain users to have their new Publications bypass the Curation steps, you can add them to a list where their Publications are auto-approved. To add users to this list, follow these steps:

1. Navigate to the backend of the HUB and click on **Publications** underneath the **Components** drop-down.
2. Inside of **Publications**, click on the **Options** button.
3. Click on the **Curation** tab and then insert the usernames of the users whose Publications are to be auto-approved.
4. Click **Save & Close** to save the changes.

### Enabling Databases

To enable databases within Publications:

1. Log onto the administrative backend.
2. Go to **Components**
3. Go to **Publications**
4. Go to **Master Types** submenu item.
5. Select the checkbox next to the "**Database**" table row.
6. Click the **Edit** Button.
7. Find the "**Content**" block for the **Databases Type**.
8. Click the **[Edit]** button next to **Block Elements**
9. Locate the "**Type**" drop-down, change "file" to "**data**"
10. Change the "Maximum count" to **1**.
11. **Save** the Block Element

### Creating a Publication License

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Licenses** tab and then click the **New** button in the upper right hand corner of the page
3. Start filling out the **License Information**:

- a. Title: The title of the license
  - b. Name: The name of the license, full name if the license is an acronym
  - c. URL: The webpage that all the legal license information
  - d. About: The background information about this license
  - e. Content: The parameters of the license such as what content this license supports
  - f. Icon: Path to icon image that lives in the Media Manger on the HUB
4. Once you have filled out the **License Information**, begin filling out the **License Configuration**:
    - a. Active: If this license should be automatically published and available on the frontend for users to use after saving
    - b. Customizable: Should the license text be customizable for publication authors to edit
    - c. Agreement required: Forces publication authors to
  5. Once you have finished filling out the information for the license, click **Save & Close**

### Selecting a Default Publication License

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Licenses** tab and locate the **Default** column
3. Locate the license that should become the new default and select the box beside the license title
4. Click the **Make Default** button and the license will be made the new default

### Publishing/Unpublishing a Publication License

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Licenses** tab and locate the license you want to publish or unpublish
3. In the **Status** column you can click on the **check-mark** or **cancel sign** to change the status of the license
4. After clicking on the status icon the new status will be automatically saved

### Reordering Publication Licenses

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down

click on **Publications**

2. Open up the **Licenses** tab and locate the **Order** column
3. Rearrange the licenses by clicking the arrows facing up and down
4. The final ordering you leave the licenses in will appear the same inside of **Publications** on the frontend of the Hub inside the **License** drop-down when creating a new publication

## Creating Publication Categories

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Categories** tab and then click the **New** button
3. Begin filling out the **Category Information**:
  - a. Name: The name of the new category
  - b. Alias: The shortname of the new category
  - c. URL Alias: The URL name for the category
  - d. dc:type: The Dublin Core Meta Data type
  - e. About: A short introduction describing what type of publication files and content are stored in this category
4. Determine what **plugins** you want to connect to the this new Publication Category
5. Fill out the **Item Configuration**:
  - a. Status: Determine if the category is active (publish) or inactive (unpublished)
  - b. Contributable: Determine if the category can be contributed to
6. Determine the **Custom Fields** by creating new fields or managing the preexisting files. The fields determine the layout of the Publication overview page:
  - a. Reorder: Drag and drop the different field rows to change the order
  - b. Field name: Change the name of the field title
  - c. Input Type: Determine the amount of text that can be inputted in this field from the drop-down
  - d. Required: Check the box to make the field required for the publication author to fill out before publishing the publication
7. Review the information and then click **Save & Close**

## Publishing/Unpublishing a Publication Category

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Categories** tab and locate the license you want to publish or unpublish
3. In the **Status** column you can click on the **check-mark** or **cancel sign** to change the status of the license

4. After clicking on the status icon the new status will be automatically saved

## Handling Publication Options

1. Navigate to the backend of the Hub and click on **Components** and from the drop-down click on **Publications**
2. Open up the **Publications** tab and then click the **Options** button in the upper right hand corner of the page
3. Inside the Publication Options, the different areas of Publications can be managed and adjusted as needed:
  4. **Defaults:**
    1. Component ON/OFF: Turning on or off Publications
    2. User Contributions Outside of Projects: Allow users to contribute to Publications outside of Projects
    3. Email Notifications: Allow component to send out emails
    4. Default Category: Newly created Publications will automatically be defaulted to this category if not selected by the publication author
    5. Default Publication Thumbnail: Path to default publication, used as a placeholder
    6. Default Video Thumbnail: Path to default video, used as a placeholder
    7. Default Image Thumbnail: Path to default image, used as a placeholder
    8. Default Master Image: Default image for Publication page cover, used as a placeholder
    9. Publication Files: Master path for restoring published data
    10. URL to Documentation: URL to page with Publication information
    11. URL to Terms of Deposit: URL of Terms of Deposit page on the HUB
  5. **Curation:**
    1. Name of Curators:(Hub) group members authorized to perform pre-publication curation (all publication types) and manage curation assignment
    2. Grace Period for Changes:Allow authors to make changes to a published resource within the grace period after approval
    3. Auto-approve:Automatically approve new submissions
    4. Auto-approved Users:A comma-separated list of usernames to be auto-approved
  3. **DOI Configuration:**
    1. About DOI Link: a link to an explanation of what Digital Object Identifiers (DOI) are [optional]
    2. DOI Namespace Start: First part of DOI namespace (what goes right after doi: and before /,e.g. 10.5072)
    3. DOI Namespace End: Hub-specific DOI namespace end (usually 2-3 characters going after /, e.g. F2K)
    4. DOI Service URL: DOI service address
    5. DOI Service User/Password: DOI Service/Password
    6. DOI Publisher: Publisher name (may use full HUB name) for DOI service
    7. DOI Resolve URL: URL for resolving DOI's
    8. DOI Verification URL: URL for verifying DOI's
    9. Issue master DOI for Publication?: Master DOI links to /main page listing all previously published versions
  4. **Sections:**
    1. Contributors: Show/Hide the list of authors on publication page

2. Format Author Display: Format list of authors on publication page
  3. Ranking: Show/Hide the ranking
  4. Rating: Show/Hide the rating
  5. Date: Show/Hide the date on the publication page
  6. Linked Data: Show/Hide a link to an OAI-ORE compliant linked data representation in the HTML source for each publications
  7. Citation: Show example/instructions for citing this publications.
  8. Suggest License: Allow users to suggest licenses
  9. Citation Format: Choose format for citations
  10. Supported Tag: A tag to display to indicate Org supported tools
  11. Supported Link: A link display to describe Org supported tools
  12. Audience Link: URL to a page describing audience levels.
5. **AIP:**
1. ?Trusted Digital Repository: Trusted Digital Repository
  2. AIP Path: AIP path (for trusted digital repos)
  3. MkAIP Admin Group: Group of administrators to get notification about archived dataset

### Master Types: Editing Block Information

1. Navigate to the backend of the **HUB** and click on the tab **Components**
2. From the drop-down click on **Publications**
3. Inside of **Publications**, click on the tab **Master Types**
4. Click on the name of the Master Type that you want to edit block information in
5. Locate the **Block** you wish to edit
  1. A Block is a section of the Publication that holds information about the materials being published (i.e. description, abstract, etc.)
6. Find the **Block Elements** section and click the **Edit** in brackets
7. Change the block information as fit, for example below is a use case of a small issue that occurs in some Master Types with the abstract switching with the description:
  1. In this case the abstract and description mappings are incorrect. There is a section that tells the block which field the Publication versions table what to map from the content block. Here, one would switch the description alias and name from "abstract" to "description" and vice versa.
8. Click **Save & Close** to save these changes

### Setting Up Group Association with a Publication

Groups can be associated with a Publication that was not published from a Project owned by any groups. Only one group can be given association rights. Usually a group is associated with a Publication if the group contributed materials or resources that helped with the Publication's development or if the group helped fund this Publication. To set up the ability for users to associate groups with their Publications, follow these steps:

## HUB MANAGERS

---

1. Navigate to the backend of the Hub
2. Hover over **Components** and click **Publications** from the drop-down
3. Inside of **Publications** click the **Master Types** tab
4. Click the title of the **Master Type** that you want this feature to be enabled on
5. Under the section called **Blocks and Configuration** locate the **Authors** block
6. Locate the *Show group ownership and allow to be assign group ownership* and change the drop-down to be **Yes**
7. Click **Save & Close** and this feature will be enabled on this **Master Type?**
8. Enable this on each Master Type that you wish for this feature to be enabled

# Resources

## Creating a Resource

1. Log in to the backend of the Hub, hover over the *Components* tab and click **Resources**.
2. Click **New** to create a new Resource.
3. In *Details* insert the following details about the Resource.
  - a. Title: This is the name of the Resource that users will see.
  - b. Type: The type is the classification of the Resource.
  - c. Alias: The title of the Resource that is used in the URL.
  - d. Location: The place where the Resource can be found
  - e. Time: This is the creation date of the Resource.
  - f. Canonical: A separate URL can be added to the Resource to connect a separate URL or link to the Resource.
  - g. Intro Text: This is the basic information of the Resource or the abstract of the Resource.
  - h. Main Text: This is the main section of the Resource information.
4. In *Contributors* insert the authors of the Resource by inputting their User ID, name, or username and click **Add**.
  - a. Removing an Author: Click the trashcan beside the user's name or **Delete** icon to remove the user as an author on the Resource.
  - b. Changing the Affiliation: Click in the **Affiliation** text box and type in a new affiliation or title that labels how this user is affiliated with the project, for example Researcher.
5. In *Publishing* insert the following details about the state of publishing for the Resource.
  - a. Standalone: Check the box to make the Resource easier to find or uncheck the box to disable that access.
  - b. Status: This is the state of the Resource and it's availability to the Hub.
    - i. Draft (user created): The Resource is in the process of being created by a user.
    - ii. Draft (internal): The Resource is in the process of being created by an administrator on the back-end of the Hub.
    - iii. Pending: The Resource is waiting for approval by an administrator of the Hub.
    - iv. Unpublished: The Resource is not available to the front of the Hub.
    - v. Published: The Resource is available to the front of the Hub.
    - vi. Deleted: The Resource has been deleted from the front of the Hub.
  - c. Group: Select a group on the Hub to add the resource to the group.
  - d. Access Level: This determines what users can access the Resource.

- i.Public: The Resource is available to all users of the Hub and visitors of the Hub.
  - ii.Registered: Only registered users of the Hub can access the Resource.
  - iii.Special: Only administrators can view the Resource.
  - iv.Protected: The Resource's abstract can be viewed, but only group members can access the files. A group must own the Resource
  - v.Private: The Resource is only visible to group members. A group must own the Resource.
- e. Change Creator: The drop-down can be used to change the creator to another user of the Hub or administrator.
  - f. Start Publishing: The date that the Resource was published on the Hub.
  - g. Finish Publishing: The date that the Resource was unpublished from the Hub.
  - h. Hits: This is a number totaling all of the times a user has read to used a resource.
6. In "Files" upload the files for the Resource.
    - a. Uploading a File: Add a file to the Resource by selecting a file and uploading it to the Resource by clicking "Upload."
    - b. Changing the File's State: Select the file and use the drop-down to change the visibility of the file by clicking "Apply." For example, this allows images added to a Resource the ability to open as an image instead of a download.
    - c. Create a Directory: This can create a file to add to the Resource by adding the title of the directory in the text box.
  7. In *Tags* type in words that affiliate the Resource with labels or titles. These tags can connect the Resource with other parts of the Hub or words that can make searches on the Hub easier to locate this Resource.
  8. In *Parameters* select the restrictions that can be set on this Resource to limit what is visible, so parts of the Resource that are not filled out can be hidden from users.
    - a. License: To connect this Resource with a license, type the license in the provided text box.
  9. Review the Resource, then click **Save & Close**.

## Editing a Resource

1. Log in to the backend of the Hub, hover over the **Components** tab and click on **Resources**.
2. Locate the Resource, and check the box of the resource to select it.
3. Click **Edit** to edit the content of the Resource.
4. Once the content has been edited, click **Save & Close**.

### Deleting a Resource

1. Log in to the backend of the Hub, hover over the **Components** tab and click **Resources**.
2. Locate the Resource that is to be deleted.
3. Select the Resource's check box, and then click **Delete**.
4. The Resource will be automatically deleted and removed from the Hub permanently.

### Creating Resource Types

The default list of types may not work for all Resources, thus any Hub administrator can create a Resource Type. This can be done from the administrative backend of the site by following these steps:

1. Log in to the backend of the Hub.
2. Navigate to the **Components** tab and then click on **Resources**.
3. Once the *Resources Manager* page has loaded, select **Types** from the sub-menu found under the *Resources Manager* title.
4. You should now be presented with a list of all the *Main Types* (selected by default). There are multiple categories of types.
  1. If not already selected, select *Main Types* from the *Categories* option found directly above the list or navigate the listing until you see those designated as *Main Types*. These are the primary types of resources users will be able to contribute, browse, etc.
5. Click the title of a type to edit it or click **New** from the toolbar on the top right of the page.
6. Fill in the title and alias of the new type.
7. Select the category of the new Resource Type from the drop-down.
  1. Generally it is a best practice to select the **Main Types** option from the drop-down if you want to give users easy access to the new Resource Type.
8. Decide if this resource type can be contributable from the frontend by checking/unchecking the **Contributable** checkbox.
9. Add a description in the *Description* text box to describe the new Resource Type.
10. Decide what custom fields you wish to have filled in by the user for that resource type.
  1. Field Name: The name of the field where data about the resource is entered.
  2. Input type: Options are single-line text boxes, multi-line text areas, checkboxes, select list (pull down), radio options, pre-defined options (language list, etc.).
  3. Required: A field may be required or not. By checking the *Required* box, this field must be filled out by the user in order for them to submit the Resource
11. The *Custom Fields* can be reordered by selecting the multiple lines under *Reorder* and dragging up or down depending on the preferred placement of the fields.

12. Add a new custom field by clicking the **Add new row** button under the current fields.
13. Click **Save** in the toolbar on the top right of the page.
14. New resource types should now be available as a resource option and changes to types should take affect immediately.

### Creating a Series Resource

A series is a resource type that allows multiple resources to be placed under a **parent** resource. This is especially useful for resources that are related and can be viewed together. Administrators can create these resources on the backend of the Hub.

Create the Parent resource:

1. Log in to the backend of the Hub and under the **Components** tab select **Resources**.
2. In the *Resource Manager*, create a new resource by clicking the **New** icon.
3. Fill in the new resource details such as the title, location, and text.
4. In the type drop down, select **Series** as the new resource type.
5. Select the contributors by entering the user's name or user ID and then add them to the list of contributors.
6. Fill in the publishing information by selecting the status as **Published**, the group the resource will belong to, access level, creator of the resource, and the publishing dates.
7. Click **Save & Close** to save the new resource series.

Add the Child resources:

1. In the *Resource Manager*, find the new resource series and click on the **+** under the column *Children*.
2. Create a new resource to add under the parent resource or add in previously created resources by clicking **Add existing** and typing in the resource ID, then click **Next**.
  2. *Note:* Only add one child resource at a time
3. After one child has been created, you can continue adding children by clicking **Add Child** under the *Resource Manager: Child Resource*. Repeat the process until you have completed the series.
4. View the new Resource series on the frontend of the Hub.
  - a. On the Resource, click **Series** and you will be able to view all of the resources under the parent resource.

# Spam

## Things to Look for

- Unprofessional profile pictures
- Non-Hub related information in the Bio
- Unprofessional URLs/links to outside websites
- Inappropriate language
- Selling ads or promotional information
- Non-Hub related content
- Components on the Hub with links in the text box

## Disable Accounts for Spam

1. Find the account that created the Spam, and then on the backend of the Hub navigate to **Users** and then click on **Members**. Click on the name to open up account details.
  - a. **Note:** You can usually be sure that the account is a spammer if they have a Hub nonrelated website link in the URL and an unprofessional profile picture.
2. If the **Public Profile** box is checked, uncheck it. It is important to make the profile not available to the public incase they have Spam links in their account.
3. Uncheck the **Confirmed** box if the user had confirmed their account. If it is not checked leave it unchecked.
4. Change the **Contact me** drop-down to the **No, Don't send me emails** option.
5. Change the spam account password by typing into the **New Password** field a long and random password that the spammer could not figure out.
6. Click **Save & Close**.
7. Find the spam account in **Users > User Manager**.
8. Check the box beside the user's name and then click **Block** to block the user from the Hub.
9. After disabling the spammer's account, find the spam that the individual has put on the Hub and delete it.
  - a. Make sure that they account has been deactivated prior to deleting the Spam.  
This way the spammers will not receive emails about their content being deleted.

## Antispam Plugins

To keep your Hub from being abused by spammers, enable these antispam plugins to give your site the fighting edge.

### How It Works

For most content on the site, when a user presses "save" to submit a new entry—be it a blog post, forum comment, wish, etc.— a "before save" event is triggered. That event allows the system to validate and run any desired pre-processing or checks on the content before it is stored within the database. When any anti-spam plugins are enabled, the content is handed off to each plugin, in their defined order (see the **Plugins Manager**), where the plugin in turn has a chance to evaluate the content for likelihood of being spam. If a plugin flags the content as being spam, the process stops (i.e., the content is not passed along to the next plugin), an error is raised, and the content fails to be stored to the database.

### Enabling

To enable these plugins, follow these steps:

1. Navigate to the backend of the Hub and locate the **Extensions** tab.
2. Click on **Plug-in Manager** from the drop-down.
3. Inside of the **Plug-in Manager**, locate a plugin through search and click on the title.
4. Inside the plugin, change the status to **Enabled** and provide any API keys or change the settings then click **Save & Close**.

### Available Antispam Plugins:

- **Antispam-Akismet:** This plugin uses the remote Akismet service to scan posted content and determine if the content has a high probability of being spam. Akismet digests massive amounts of data from hundreds of sites a day to learn about how to protect sites from spammers. Learn more at: <http://akismet.com>.

Usage of this plugin requires API credentials provided by having an Akismet account.

- **Antispam-Baba Ji Spam Detector:** This plugin provides content spam section of the mass spammer Baba Ji.
- **Antispam-Bayesian Filter:** This is a spam detector that employs a basic Bayesian filter which looks for spam headers and character strings.

- **Antispam-Black List:** This is a spam detector that detects black-listed words; inside the plugin words can be added to a list to build the black list inventory.
- **Antispam-Link Rife:** This is a spam detector that detects link frequency in a body of text. This spam detector has three configuration options for determining if submitted content is likely spam:
  1. Link Frequency - Maximum number of links allowed in a text before it is considered spam.
  2. Link to Text Ratio - Ratio (In Percentage) of the number of links to the number of words in the string. If the percentage ratio is greater than the specified ratio, it is considered a 'Link Overflow'.
  3. Link validation - Check found links against known blacklists.
- **Antispam-Mollom:** This plugin uses the remote Mollom service to scan posted content and protect a Hub from users who post abusive content like profanity and will learn as it grows. Learn more at: <https://www.mollom.com>.

Usage of this plugin requires API credentials provided by having a Mollom account.

- **Antispam-SpamAssassin:** This plugin scans posted content with SpamAssassin to determine if the content has a high probability of being spam. SpamAssassin is an Open Source antispam platform which allows administrators to filter and classify bulk spam. Learn more at: <http://spamassassin.apache.org>.

### Testing Content

Sample content may be tested against enabled plugins to further examine which plugin may have flagged content as potential spam and why. The testing interface may be found by:

1. Navigate to the backend of the Hub and locate the **Components** tab.
2. Click on **Support** from the drop-down.
3. Inside of the **Support Manager**, locate the sub-menu item for **Abuse**.
4. Inside of the **Support Manager > Abuse** panel, locate the sub-sub-menu item for **Spam Check**.

A form with a single text box will be present. Paste content into the box and click the "Check" button in the toolbar. The interface should update to display a list of all anti-spam plugins the content was passed through and the results of said plugins.



# Storefront

## Overview

There are six main sections that must be completed in order to add a product to the storefront: products, product options, product skus, collections, option groups, and options.

All actions listed here take place in the administrator interface of the hub, similar to <https://hubname.org/administrator>. Proper administrator privileges and logging in are required.

Storefront component can be found by:

1. Log into the administrator interface (/administrator)
2. From the Main Menu point the mouse to Components -> Storefront (click)

Some terms that will be helpful:

Control buttons: Always at the top right of a page, but under the logout button. Typical actions include: Save, Save and Close, Cancel, New, Edit, etc.

Alias: Refers to the short name of a name or title that appears in the URL. Does not usually include numbers or symbols. For example, a collection entitled “Antivirus & Security Software” has an alias of “securitysoftware”

SKU: Stock keeping unit. Specifies a specific product after options have been selected. For example, the product is “ArcGIS”, and there may be many SKUs available: ArcGIS Trial Windows 10, ArcGIS Pro Windows 10, ArcGIS Pro Mac OS 10.4+, ArcGIS Pro Linus, etc.

### **Creating a Collection**

1. From the Storefront administrator interface , click on the “Collections” tab.
2. From the control buttons at the top right of the page, click on the plus icon button to add a new collection.

3. Enter a collection Title and alias and select it to be “Published”.

4. From the control buttons click on the star icon to “Save and Close”.

### **Creating a Option Group**

1. Click on the “Option Groups” tab.
2. Click on the control button with the plus icon to create a new Option.

3. Enter a Title and select it to be “Published”.
4. From the control buttons click on the star icon to “Save and Close”.

### Creating Options

1. Creating Options
  - Click on the round plus icon in the “Option (Published)” column) to create a new
  - Enter a Title and select it to be “Published”.
  - Repeat as needed for additional options.

Note:Clicking the number in the options column will display the list of all created options that option group.New option may also be added from that page by clicking on the plus icon control button.

### Creating a Product

1. Click on the “Products” tab.
2. Click on the control button with the plus icon button to create a new product.
3. Complete the required fields and any additional fields. Be sure to select the correct options on the right column of the page.

option.

- From the control buttons click on the star icon to “Save and Close”.

4. From the control buttons, click the check icon to “Save” and for the additional options to appear.

5. Click on the “Edit type-related options” for the EULA , etc.

6. Enter the desired text and if the EULA is required. When complete, click on the “Save and Close” star from the control buttons to return to the Product page.

7. Click on the “Save and Close” star again to save and close the product.

### **Creating a SKU**

1. Click on the “Products” tab.
2. Click on the control button with the plus icon to create a new SKU.

3. Enter a Title and Price.
4. Select the individual option created earlier for this specific SKU.
5. Enter an override EULA or any additional product options.
6. In the right column, select the desired options and select the SKU to be “Published”.

7. Specify the download file. \*\*See the section on uploading software files below. Be sure not to include any spaces in, before, after the filename.
8. From the control buttons click on the star icon to “Save and Close”

9. Repeat as needed for additional options.

Note: Clicking the number in the options column will display the list of all created options that option group. New option may also be added from that page by clicking on the plus icon control button.

### **Uploading Software Files**

1. From the Main Menu of hub’s administrator interface: Content -> Media Manager (Click).
2. Double click on the “Software Folder”
3. Click on “Choose File” below.
  - a. Choose the file.
  - b. Click on the “Start Upload” button.
  - c. The file upload should complete momentarily.
4. Return to the Storefront administrator interface.

# Super Groups

## Creating a Super Group

1. Log in to the backend of the Hub and hover over the **Users** tab and select **Groups**.
2. Click **New** to create a group.
3. Select the group type from the drop-down to be **Super**.
4. Fill in the CN or group alias, the title and logo of the group, along with the public and private group descriptions.
5. In **Membership Control**, check the box if the membership is to be controlled. The membership **Join Policy** determines access level for the group.
  - a. **Public**: Any user on the Hub can join the group.
  - b. **Restricted**: Qualifications are given that predetermines who can join. These restrictions have to be added into the credentials.
  - c. **Invite Only**: A group manager has to send an invite any new group members to the group.
  - d. **Closed**: No one can join the group unless they are added from the back-end of the Hub.
6. Determine the access level of the group from hidden or visible. A hidden group is not listed on the front-end of the Hub, and any content is unavailable to any user that is not a member of the group. A visible group can be found on the Hub through regular searches.
7. Once all the group's content has been filled in, then save the new group by clicking **Save & Close**. The group will be automatically approved and visible on the Hub.
8. The following will be automatically created when making the super group:
  - a. Base template with custom error handling & login
  - b. Separate database for super group related components, data, etc
  - c. If Gitlab integration is enabled, all needed connections will be made and super group folder will be controlled via Git.

## Frontend Module Management in Super Groups

### Accessing the Module Manager:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.

3. Select the **Manage Modules** tab to view the module manager.
4. Search for modules by using the search drop-down that searches for a module based on location and title.

### Adding a Module:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.
3. Select the **Manage Modules** tab to view the module manager.
4. Click the **New Module** button in the toolbar
5. Fill in all required fields and click **Save Page**.

### Publishing a Module:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.
3. Select the **Manage Modules** tab to view the module manager.
4. Publish the module by clicking on the **Unpublished** icon. The icon will become a **Published** icon.
5. The module will now be available on the front interface of the Hub.

### Unpublishing a Module:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.
3. Select the **Manage Modules** tab to view the module manager.
4. Unpublish the module by clicking on the **Published** icon. The icon will become an **Unpublished** icon.
5. The module will now be removed from the front interface of the Hub.

### Editing a Module:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.
3. Select the **Manage Modules** tab to view the module manager.

4. Click on either the **Manage Module** button or hover over the arrow next to the button to see more options, including **Edit Module**.
5. One of the new features with the module manager is the page content WYSIWYG editor. It now uses CKEditor and HTML to manage your page content.
6. Modify the module with new changes, and then click the **Save Page**.

### Reordering a Module:

1. Log in to the Hub and access the **Super Group** home page.
2. Click on the **Manage Group Pages** link in the group manager toolbar, to get to the page manager.
3. Select the **Manage Modules** tab to view the module manager.
4. Click on either the **Manage Module** button or hover over the arrow next to the button to see more options, including **Edit Module**.
5. One of the new features with the module manager is the page content WYSIWYG editor. It now uses CKEditor and HTML to manage your page content.
6. Modify the ordering of the module by using the drop-down, and then click the **Save Page**.

# Support

## Tickets

Users can create tickets when they experience a problem on the Hub that is not answered in Questions and Answers or Knowledge Base. Tickets are ways to report bugs or issues that they experienced with the Hub. Administrators are then able to access the Support component to help solve these issues.

## Answering Tickets

1. Navigate to <https://yourhub.org/support> and login to the hub.
2. Access the **Support and Ticket Tracking System**.
3. Select the tickets that are under the open tab on the side of the page.
4. Select the ticket that has been unanswered.
5. In the Comment Form, add tags to connect the ticket to search engines in the ticket system.
6. In the assignee dropdown select your name. Note: You can only be an assignee if you have gained ACL access on the back-end of the Hub.
7. Select the severity of the ticket. Critical and major are high priority tickets. Normal tickets are common yet important tickets. Minor and Trivial tickets are low priority.
8. Select the status of the ticket from the drop down. Open tickets are unanswered tickets; **Awaiting User Action** holds the ticket until they answer or respond. Closed tickets are listed by the reason they are closed: Answered, Duplicate, Fixed, Invalid, Spam, Transferred, Won't fix, and Works for me.
9. Answer or leave a canned response for the user that submitted the ticket. Canned responses allow the assignee to respond using generic responses premade to fit various situation such as: first response, second response, and closing ticket.
10. In the bottom box CC any users or other assignees to the ticket to include in the conversation on the ticket, then submit your response.

## Messages

To aid in responding to support ticket submissions, you may create custom message templates for frequently used responses. Example responses include a "Ticket resolved" message sent upon closing a ticket or a "Request for more information" message.

Messages may also include placeholders where information that changes can be specified. For instance your message template may include references to the specific ticket ID number or site name. A "Ticket resolved" template could look like this:

“Thank you for using the (sitename), and for reporting this problem. We believe that your issue (ticket#{ticket #} in our system) has been resolved. If you continue to have problems please let us know. You may reopen a closed issue at any time by following the link at the end of this message and adding a comment to the ticket.

Thank you for helping us to improve (sitename)!

--the (sitename) team

Here we have two placeholders: {ticket#} and {sitename}. The placeholders are replaced with their current value at the time of composition. When chosen from the select box under “Comments” of the response form, the comments text box will be filled with the following:

“Thank you for using the YourHUB, and for reporting this problem. We believe that your issue (ticket #123 in our system) has been resolved. If you continue to have problems please let us know. You may reopen a closed issue at any time by following the link at the end of this message and adding a comment to the ticket.

Thank you for helping us to improve YourHUB!

--the YourHUB team

## Resolutions

Resolutions give a report of how the ticket was solved once it is closed. For example if a ticket was answered the resolution would be “Answered” or if the ticket was never answered because the ticket owner did not respond with new information then the ticket could be closed with the resolution “Closed (No Answer).” This system helps inform the support team or administrators that search through closed tickets the necessary information on why the ticket was closed.

- Open- unanswered ticket
- Awaiting user action- waiting for user to respond
- Closed- ticket has been answered or fixed
- Answered- answered question of the user
- Duplicate- the issue has already been reported
- Fixed- the bug that was reported has been fixed
- Invalid- this status is used for testing purposes and spam
- Transferred- the issue was a enhancement request and moved to the wish list
- Won't fix- no solution to the issue
- Works for me- the bug reported is not reoccurring for assignee of the ticket

## Tags

The tags allow tickets to be searched and tracked easily. Tags can also serve to inform the support team about the problem without reading through the whole context of the ticket.

### Stats

The stats page gives a basic overview of support ticket activity starting at the beginning of a chosen year, defaulting to the current year if none is specified. Stats shown may also be filtered by group.

The following data is shown:

- Tickets opened for the given year
- Tickets closed for the given year
- Tickets opened for the current month of the year
- Tickets closed for the current month of the year
- Tickets opened for the current week of the year
- Tickets closed for the current week of the year
- Open tickets
- Unassigned tickets
- Average ticket lifetime
- A list of administrators and the number of tickets closed
  - Closed for the given year
  - Closed for the current month of the year
  - Closed for the current week of the year
- A line chart displaying Tickets Submitted (red) vs. Closed (green) on a monthly basis

### Access Control Layer (ACL)

The ACL (Access Control Layer) works in conjunction with a user login system to allow or deny a user access to support tickets and various information or features of a ticket.

Permissions may be set for individuals or entire groups of users. All members of a group will inherit any permission set for the group. If a user is a member of multiple groups with ACL settings, the highest permissions will take affect.

Individual ACL settings take precedence over any other settings.

### ACL Options

1. Navigate to **<https://yourhub.org/administrator>** and log into the backend of the Hub.
2. Click on the **Components** tab and then select the **Support** button from the drop-down.
3. Inside of **Support**, click on **Options** to view details in the ticket submission process.
4. There are three tabs that all define the parameters of tickets and available options for the Hub ticket system.
  - a. **Defaults:** displays the front page options when submitting and answering tickets
  - b. **Files:** controls the parameters of how documents and tickets are uploaded
  - c. **Antispam:** controls the words that can be used when submitting tickets to keep spam out of the ticketing system
5. Click **Save** or **Save & Close** to allow the changes that were made in these tabs to be saved on the Hub.

### Giving ACL Permission

1. Navigate to **<https://yourhub.org/administrator>** and log into the backend of the Hub.
2. Click on the **Components** tab and then select the **Support** button from the drop-down.
3. Inside of **Support**, click on the **ACL** tab.
4. Under all of the available users that have permission for **ACL access**, there is a text box to input alias or ID name.
5. Input the name of the new ACL access, then select the sections that the user can have control in.
6. Click **Add** to confirm the new ACL access for the user.
  - **Note:** Super Administrators automatically receive ACL access and support permissions.

### Enabling Email Notification for Abuse Reports

1. Navigate to **<https://yourhub.org/administrator>**, and login as an administrative user on the backend of the Hub.
2. Click the **Components** tab and then select the **Support** button located in the drop-down.
3. On the **Support: Tickets** page, select the **Options** button in the top-right corner of the page.
4. Select the **Abuse Reports** tab.
5. Enable notifications to be sent when a report is created by selecting **Yes** from the drop-down.
6. Add the email address that the notification should be sent to by inserting it into the "Notify when abuse report created" box.
7. Click the **Save & Close** button to save the changes and you will be navigated back to the **Support: Tickets** page.

### Enabling Privacy/Minimal Information Mode in Support Emails

Ticket content can be protected in emails by enabling privacy/minimal information mode to avoid sending potentially sensitive data. This Support feature complies with FISMA and HIPAA standards on restricting sensitive data.

In order to turn on this feature, follow these steps:

1. Navigate to the backend of the Hub and locate the **Components** tab.
2. Click on the **Components** tab and from the drop-down click on **Support**.
3. Inside of **Support**, locate the **Options** button.
4. Locate Email Content and select from the drop-down the configuration of your choosing.
  1. Terse: Emails will only contain a notification that the ticket has been updated and removes all sensitive information about the ticket.
  2. Detailed: Emails will contain a notification that the ticket has been updated and details about what was updated in the ticket
5. Click **Save & Close** to save the new changes.