



# TAFE VC e-Portfolio

<http://eport.tafevc.com.au>

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## What is the e-Portfolio?

The e-Portfolio is a free, open source Content Management System. The focus of the e-Portfolio is to provide value at a range of levels for all users

It comes with a workflow engine, preconfigured security and roles, a set of content types and multi-lingual support. The e-Portfolio is based on the Content Management Framework.

Homepage: [www.eport.tafevc.com.au](http://www.eport.tafevc.com.au)

## What is a Content Management System?

A CMS allows you to manage content, usually for a web site. The main goals of CMS are to allow easy creation, publishing and retrieval of content to fit a business needs.

One common dividing line between different CMS's is the integration of the web and hence there are two types of systems: a web based system, and non-web based system. The e-Portfolio is a free, open source web based CMS.

## Why use a web based CMS?

The easiest way to understand a CMS like the e-Portfolio is to compare it with a standard web site design tool, like Macromedia Dreamweaver. In both cases pages can be produced on a remote computer, and submitted for approval and publication. There are, however, four key differences:

- any user with the required permission can produce web pages from anywhere, using any standard browser, with no need for any specialist software.
- A CMS is easier to use than Dreamweaver and FTP, therefore very little training is needed, and many more production tasks can be done by individuals without the requisite web-development skills. As a consequence, a CMS empowers more users to create and edit content on the Web.
- control of workflow in a CMS can be very finely grained, with the Webmaster's job being effectively devolved to many people working in different places without any lowering of security and, more generally, of quality standards.
- different versions of a document are automatically saved, resulting in a natural audit trail when required.

## Some Technical Comments

The e-Portfolio is built using the Zope open source web application server, written in Python. It is a scalable, stable, powerful system that includes an object database, a web server and several templating languages. Zope is developed and supported primarily by Zope Corporation, but also by many developers worldwide.

Homepage: <http://www.zope.org>

Zope is object-oriented, in the sense that everything appearing in a Zope web site (web pages, images, links, files) is an object and is contained in an object database. The database is hierarchical, not relational, and is particularly suited to hierarchical file structures. Technical people think of databases in terms of collections of tables of rows and columns, related by primary keys. This is different, and mirrors much more closely the structure of an ordinary file system, with objects within objects.

The Zope database contains all older versions of an object: this is particularly useful for undoing changes, for the control of versions of collaborative documents, and for items requiring an audit trail.

Zope contains a number of tools that are specially suited to large organisations and collaborative work, and will be described later in the manual. One example: predefined database searches, based on flexible search criteria, which automatically display all objects satisfying certain user specified conditions.

Zope was created for use by large organisations, with the following characteristics: large number of contributors to collaborative projects, with contributors located at different sites and using different platforms; strong organisational requirements for flexibility and security, with the need to define local roles with different permissions to view, write, edit and approve different parts of large projects; scalability to large numbers of objects and servers.

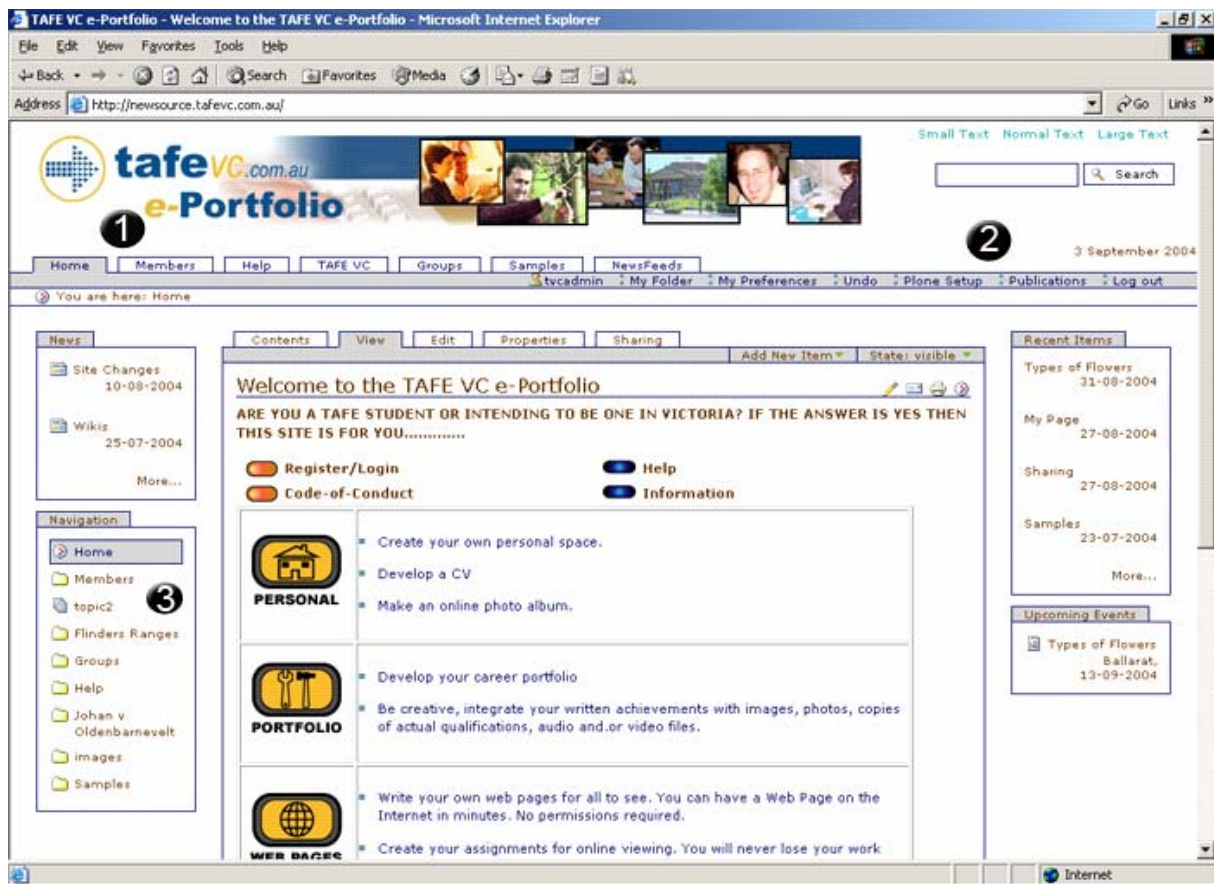
# Using the e-Portfolio

The e-Portfolio makes use of current browser standards and techniques, so using a recent version of a web browser is recommended.

## Navigating Through the e-Portfolio

The e-Portfolio site navigation is split into three parts:

- The main section (1)
- Personal navigation (2)
- The navigation tree (3)



The navigation tree is created dynamically. What is shown in the navigation tree depends on the following:

- The role and group of the user is logged in;
- The objects created and whether they are published, visible or private;
- The e-Portfolio navigation settings.

### Exercises:

- Click on the tabs (marked as 1).
  1. Click *Home* and the page should refresh.
  2. Click *Members* and search for *Brian*.
  3. Click *Help* and browse through some of the help files.
- Click on the object shown in the navigation box (marked as 3).

## Joining a Site

Joining a the e-Portfolio site gives you the right as a Member to add content, such as images, documents and so forth. To join a site, select the `join` link in the top right hand corner of the home page.

This opens the join form for you to complete. If this is the first e-Portfolio form you have encountered, you will note a few things: A red square next to the label of an input field means the field is required. When you select a field, help text will pop up to the left. You may navigate through the form fields by clicking on them. There are several fields on the join form:

**Full Name:** Your name.

**Username:** The username you wish to use, most people choose an alphanumeric value without spaces such as "bob" or "jane97".

**E-mail:** A valid email address is required. This will enable your password to be mailed to you. You will be able to change this email address later on by editing your member preferences.

Once you have completed this form, click `register` to submit your information.

## Logging In

With your username and password emailed to you, you can log in to the site by typing them into the log in box in the left-hand column and clicking the `log in` link. Cookies must be enabled for you to log in to the e-Portfolio site.

On the first login you will be requested to change the password given to you. The new password you wish to use must be more than 5 characters in length and can contain letters, numbers and the underscore(`_`) character. Passwords are case sensitive.

## Forgotten password

If you forget your password it can be sent to the email address you provided when you registered. You can request that your password be mailed to you by clicking on the `Forgot your password?` link located in the left-hand column of the website. Contact your **Site Administrator** or the **TAFE VC HelpDesk at 1800 896 122** for further help.

## Logging out

Once you are logged in to the e-Portfolio site, in the upper right hand corner you will see a link to `log out`. It is good practice to `log out` of the e-Portfolio when you are finished using it.

## Member Folders

Each member has a folder where they can create and store content. They are located in the `Members` folder and contain a default home page called `index_html` or `index.html`. To see your member folder, click on the `My Folder` link in the personal bar in the upper right hand corner of the site. The *Home Page for <username>* contains further information to assist you.

## Setting User Preferences

In the upper right hand corner there is also a `My Preferences` link that opens the `Personalise form`. This form allows you to set a number of preferences that change how you interact with the site. The `Personalise Form` also opens automatically when you first login to allow any changes to be made then. The Form has the following options:

- **Full Name**— Your normal full name.
- **E-Mail** – This is the email address associated with your membership and is used a number of places in a the e-Portfolio site. Most importantly, if you lose or forget your password, this is the address the system will send it to.
- **Content editor** – When editing complex content you may want the help of an editor. The *Epoz Editor* has been made available, you can select it here. It will then be used when you click on the edit tab of an object. Epoz has functions similar to Microsoft Word.

### **Setting Up the e-Portfolio Editor (Epoz)**

- 1) The e-Portfolio has it's own WYSIWYG Editor. Log in to the e-Portfolio and click on MY PREFERENCES on the personal bar.
- 2) Within the Preferences page click on PERSONAL PREFERENCES. When this page opens, select EPOZ from the pull-down menu under CONTENT EDITOR. Ensure that the other fields, e.g email, are filled in also.
- 3) The Editor has a similar tool structure to Microsoft Word and most are self-explanatory. A key difference relates to the 'Open Folder' tool. When clicked, images are taken from a special directory within the e-Portfolio which has been filled from the 'Add New Item' link on the CONTENTS DIRECTORY.
- 4) The UPLOAD CONTENTS field will insert contents from text or HTML files. Please note: Not from Word documents.
- 5) HTML code can be displayed and edited by clicking the small radio button at the bottom left of the Editor.

- **Listed in searches** – This property specifies whether your profile will show up on the Members tab and when someone searches the members listing. *Default: Listed*
- **Allow Editing of Short Names** – Objects have a `Name` property that is used for the internal representation of the content object. The `Name` also shows up in the object's web address (also called a URL). By default these look something like: *News\_Item.2002-11-16.4102*. You could make it much simpler such as *november\_news* by changing the `Name` value.  
*Note:* When you change an object's name value, anything that references the older name will no longer be valid and would result in the page not being found. It is best not to change the name value after you submit an object for review or link to it from elsewhere.
- **Portrait** – In larger organizations and in community websites it is useful to see pictures of other members. The portrait field allows you to upload a picture that is 75 pixels wide and 100 pixels high. (If you upload a picture that is a different size, it will be resized to 75 x 100).

Once you have made the desired changes to your preferences, click `save` to commit them.

## Adding and Editing Content

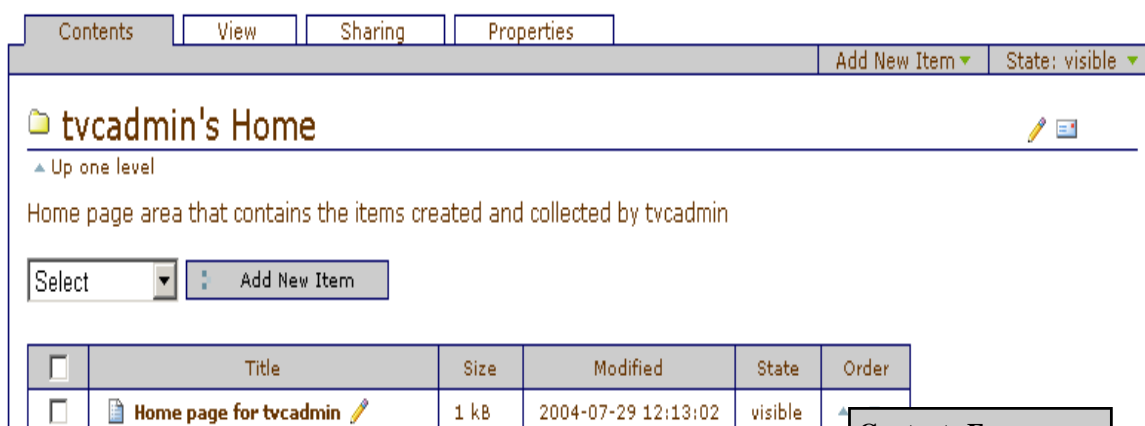
As a site member, you have a folder in the members section where you can store your content. A range of content types are available for a member to create, these include: documents, news items, forums, wikis etc. In all cases the `Contents Frame` is the key platform for members to work from. The `Contents Frame` becomes visible when `My Folder` is selected from the `Personal Bar`. From this point all items can be added, viewed, edited, shared and metadata added through `Properties`. `My Folder` already contains a document called *Home Page for <user name>*.

## Documents

A document is a page of content, usually a self-contained piece of text and images. Documents can be written in several different formats, plain text, HTML or Structured Text. The default home page for the e-Portfolio site is one example of a document.

## Adding a document

To add a document, you will need to be in `Contents View` mode. This mode shows you the list of objects in the folder and lets you edit them. If you do not see the `Contents View` tab, you do not have permission to add or edit content in this location. Once you are in `Contents View`, you will notice a drop down box in the upper right hand corner of the `Contents View Frame` next



to the "add new item" button. This gives you the list of content types you can add in this folder. Select `Document`. Once a document has been added you are taken immediately to the edit page for that document.

## Editing a document

The document can be edited directly in the e-Portfolio through the web browser, using the edit form. There are four fields for a document when in the edit mode:

- **Name:** This identifier will become part of the document's web address. It should be short, descriptive and contain no underscores or mixed case. For example, "audit-report-2003". If you do not provide a name, The e-Portfolio will create one for you.
- **Title:** This item will be shown at the top of the page, in the breadcrumbs, in the search interface, in the title of the browser and so on. This field is required.

- **Description:** This is a short lead in to the document – usually no more than 20 words – to introduce the document and provide a teaser for the remainder of the document.

**Body Text: Body Text only applies if you don't have the *Epoz* editor configured.**

- This field contains the body of the document. The format for the content is set using the radio buttons below the field. They are:
  - *Structured Text:* The default setting. Structured text is a format for taking plain text and producing HTML without the user having to learn or type HTML. Structured Text references are available by following these links:
    - ◆ An Introduction to Structured Text
    - ◆ Structured Text Help
  - *HTML:* Any arbitrary HTML can be entered by a user.
  - *Plain text:* Plain ordinary text with no mark up.

If you have your document as a file on your computer hard drive you can upload this *instead* of typing it into the body text field. Use the upload button at the bottom of the page. The contents of an uploaded text or HTML file will replace any content in the body field. Note that documents with embedded formatting such as Microsoft Word files cannot be uploaded this way. There are three ways of overcoming this:

- Save the Word file as a Web page. Load it into Dreamweaver click on the Commands window and select *Clean Up Word HTML*. Save the document and load it into *Epoz*. This will result in a clean and formatted document. This process does **not** work for Microsoft Front Page.
- Copy the text and paste the text directly into the *Epoz* window. This may result in some mixed-up formatting requiring additional editing.
- Save the Word file as text, load the text into *Notepad*, save the file from *Notepad* and upload the file into *Epoz*. Note that Microsoft maintains the formatting codes across different applications. Even when saving the Word doc as a text file within Word, it maintains the formatting and **cannot be imported** into *Epoz*.

Once you have finished editing your document, click the `save` button. You will be returned to the view tab where you can see how the document will be rendered. To edit it again, click on the `edit` tab.

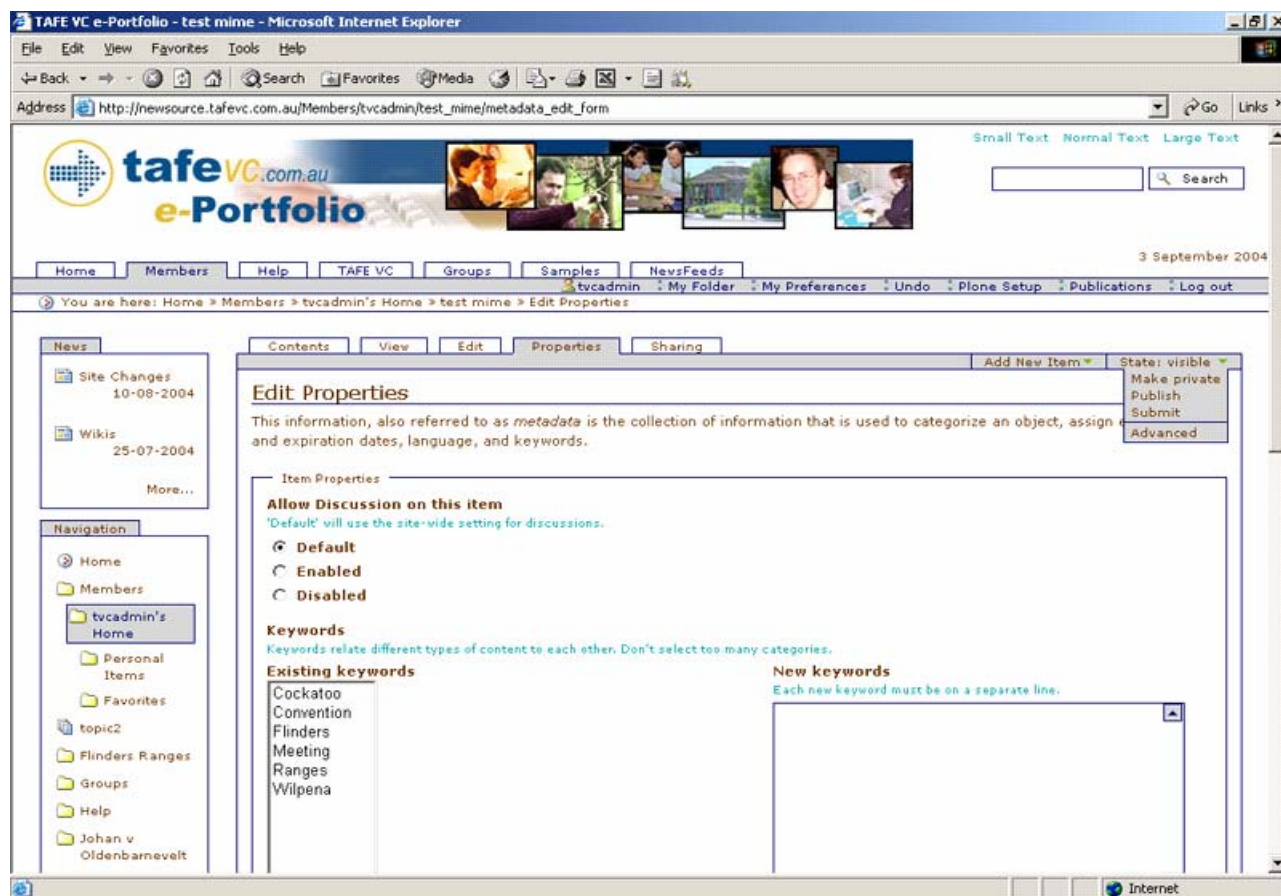
If you don't provide correct input on the edit form, when you save the document you will be returned to the edit page and your errors will be highlighted. At this point your changes have not been applied you must correct the mistakes and click `save` again.

*Note: Any edits to a document must be saved before moving to another page or all edits will be lost.*

## Assign properties to a document

Objects such as documents, news items, wikis etc. can have properties assigned to them. These properties are also known as metadata and provide information such as keywords, copyright and contributor information.

The properties form is selected by clicking on the `Properties` tab and has several fields that are common to all types of objects:



- **Allow discussion:** This property lets this document be discussed by users who have the right to do so. If left in default, it will use the site wide policy which is set to *disabled*.
- **Keywords:** Keywords are a way of assigning metadata to an object. Use control+click to select multiple keywords from the list.
- **Effective Date and Expiration Date** — The effective date is the first day an object should be made available and the expiration date is the last day. Searches and navigation only show objects within this date range. Leaving these items blank makes an object infinitely available.
- **Format:** The MIME-type of the object. If you don't know what this is, just leave it.
- **Language:** The language in which the item is written.
- **Copyright:** Copyright information for the object.
- **Contributors:** The names of the people who contributed to the object. Each person's name should be on its own line.

## Publishing your document

Documents are created in the `visible` state, which means people can access them, but they will not show up in the site navigation tree. Visible documents are available through the search feature and by linking directly to their URLs.

When you are satisfied with your document you may wish to submit it for publishing. To do this, select the `state` tab. This page gives access to the publishing process.

- *Effective Date*: allows you to specify a date this content is effective from. Until this date is occurs, the content will not be published. If this date is not specified, then there will be no effect and the document will be published.
- *Expiration Date*: allows you to specify a date this content will expire on. After this date the content will no longer be published. If this date is not specified, then there will be no effect and the document will be published.
- *Comments*: provides an interface to add comments to this publishing process. These comments can be read by the person reviewing your content in the publishing process. Similarly if the reviewer rejects your content, they will be able to put comments here so that you will know why your content has been rejected.
- *Change state*: these are the states that the document can be saved to. Publishing and reviewing content is covered in more detail later, but for the moment you will want to publish your content, so select `Submit` and then click `save`.

Your document will now be in the `pending` state. A reviewer will review your content and decide whether to publish it as is, edit it and publish it, or reject it.

## Adding and editing other forms of content

There are several different object types that come by default in a the e-Portfolio site. Adding and ed-

### Exercise:

Click on the *My Folder* link on the personal bar. The contents frame will open. Click on the document: *Home Page for xxxx*. Click the *Edit* tab and enter the following text at the bottom of the page, into the *Epoz* editor window:

*“A volcano is a geological landform where magma—rock of the earth's interior made molten or liquid by high pressure and temperature—erupts through the surface of the planet.”*

- Change the title of the document to something more meaningful to you.
- Change the colour of the font
- Place the cursor over each of the *Epoz* tabs to determine their purpose.
- View the HTML code.

iting these object types is a similar process to the one described above for documents.

## File

A file is any arbitrary object that can be uploaded from your file system. This could be any sort of item such as a plain text file, a Microsoft Word Document, an Excel Spreadsheet, a PowerPoint Presentation, an Acrobat PDF and so on. When you add a file, the id of the file is changed to be the name of the file. So if you upload a file called `book.pdf`, it will be accessible in the e-Portfolio as `book.pdf`. *Note*: A file is added into the e-Portfolio like an attachment and generally, cannot be viewed from within the e-Portfolio.

## Folder

Containers are the simplest and most powerful mechanism for organizing content. A Folder is a container that can house any sort of content object, such as Files, Documents, or any other content type. By default all content types can be added to a Folder.

## Forum

FORUMS can either be created individually or within a Forum Folder as a container. The Forum can be created by any Member and shared as per any item of content. It can also be presented for publication to the site administrator. The Forum folder automatically inserts a Public Test Forum and

### Exercise:

From your Contents Frame:

- Create a folder, give it a title and a short description.
- Copy your Home Page that you worked on earlier and Paste it into the new folder.
- Rename the copied file to another name.
- Create a short document in Microsoft Word, save it on your hard drive and add it as a file to the new folder.

a Member Test Forum. These can be deleted if so desired.

The Forum has a whole range of configurable items. In most cases the default provided works. A key item to consider is whether the forum is moderated or not.

## Image

Images are graphical pieces of content. This content type usually ends with an extension such as: gif, jpg, png, tif or pict. Images can be displayed inside of the e-Portfolio CMS without having to

Forums have different states, depending on what permissions to view and post the forums should have:

- public1 - members can post, anonymous can view
- public2 - as public1 but anonymous can reply to topic
- open - like public2 but anonymous can start topics and reply
- members - only members can view or post
- Custom - makes visible but not public

### Exercise:

- Create a Forum Folder inside you're "My Folder". Give it a title and a short description. The topic will be about the *El Nino* weather pattern.
- Create a Forum inside the folder, maintain the current configuration settings and add a relevant image and a short description about: *How El Nino affects Australia*.
- Change the permissions to *Members forum*.
- Add a Post
- Add a Poll with at least one question and three answers
- Add an announcement
- View others' forums and post at least one message.

download them to the local computer if the image type (extension) is viewable in the user's web browser.

When you add an image, the id of the object is changed to be the file of the image. So if you upload an image called photo.gif, it will be accessible in the e-Portfolio as photo.gif.

When adding or uploading a new image you can select the image from your file system by using the `browse` button and selecting the file. It is noteworthy that Macintosh `.pict` files are often not viewable by Microsoft browser platforms.

## Link

### Exercise:

- Add one of the provided images to your new folder.
- Open the document you copied and saved earlier.
- Insert the added image into your document.

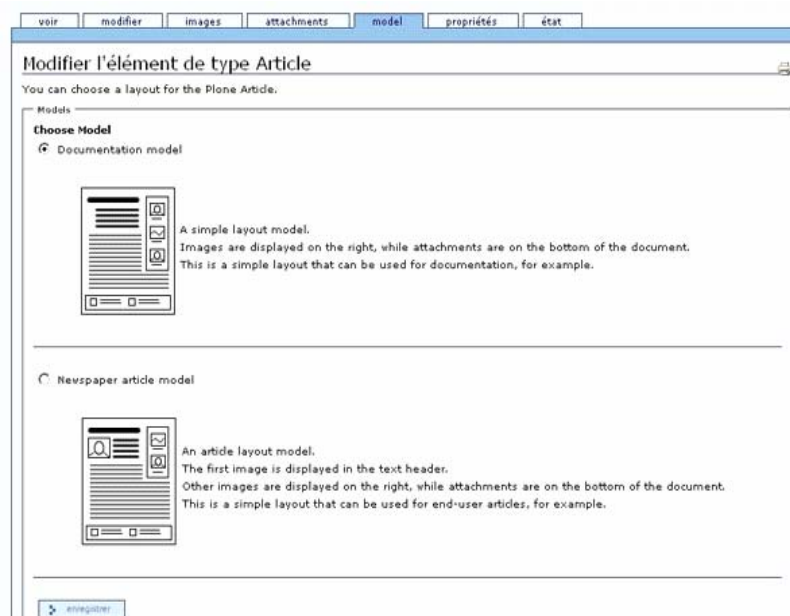
Link objects are the primary way for users to share URL's. These URL's can be internet resources or local resources. Links can contain metadata like any other content object. Please note that if you are going to link to an internet resource you should preface your link with the suitable protocol (e.g. `http://`), otherwise your link will possibly be incorrect.

Links can also be inserted into a document from the *Epoz* editor via the `open file` button. Internet links can also be added via the *Epoz globe* button.

## Plone Article

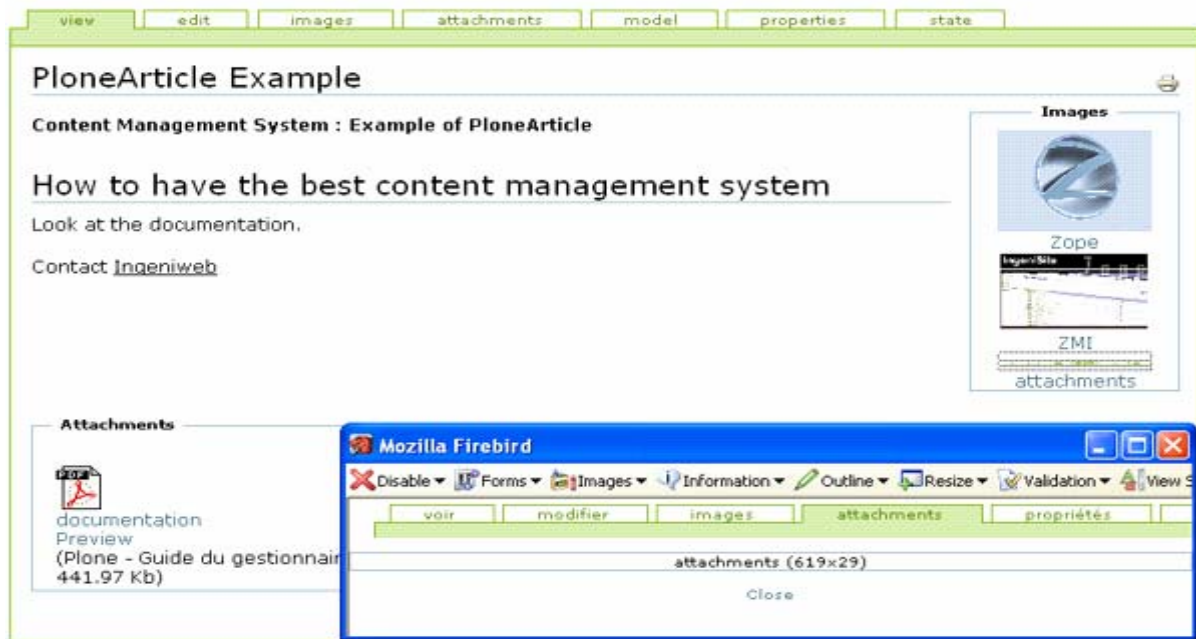
A PloneArticle is a new content type that can be added by members in a folder. After having selected it in the items list, the user will have to fill in some basic information, such as the title, the description and the body text.

The diagram on the next page provides an example of a PloneArticle which includes a panel of images, descriptive text and an attachment. The Article can best be described as a newspaper outline with additional information in attachments. Click the `Model` tab on the PloneArticle Contents frame to view the range of models as shown on the diagram.



## Topic

Topics enable users to access collections of resources by querying the central information repository. The collection is defined on



#### Exercise:

- Open the CV PloneArticle in the Samples section of the e-Portfolio. Click on the photos to open them for a larger display. Note the files attached to the bottom of the page.
- Try out the Plone Article by creating one for yourself. Note the different models available by clicking on the Models tab of the Content Frame.
- Add text, images and attachments.

the `criteria` tab. The criteria specified will match all content objects that are catalogued by the system. You can query a number of different aspects of the system: by physical location, time created, review state, and many other facets. Topics only link to other resources; they do not keep physical resources inside them like normal Folders.

**By default only users with the `Manager` role are allowed to create topics.**

## News Item

News Items are commonly used in websites. Members need to `submit` their News item to the site administrator for site-wide publishing. Published News Items show up in reverse chronological order on the `News portlet` on the left hand side of the e-Portfolio home page.

## Photo

Photos, or any image for that matter can be added into the member's `My Folder` location. The photo name will be automatically allocated from the file name unless additional information is entered prior to uploading. Additional information can be supplied in terms of a `Title` and `Description`.

## Photo Album

A Photo Album is a container for uploaded photos. The Photo Album provides a storybook for the photos by allowing display in various sizes. If additional information is provided on the photos, a powerful method of communication can be created.

## Wiki

A wiki is a collection of interlinked wiki pages. A Wiki allows users to freely create and edit Web

### Exercise:

- Compare the PhotoAlbum of the “Immigrant Ocean Liner” with the Article of the “Immigrant Ocean Liner”. What are the advantages and disadvantages of each method?
- Create a photo album in your new folder.
- Add 3 photos into the photoalbum from the collection provided.
- Create a short story for each photo as you add them to the album.

page content using any Web browser. Wiki supports hyperlinks and has a simple text syntax for creating new pages and crosslinks between internal pages on the fly.

Wiki is unusual among group communication mechanisms in that it allows the organisation of contributions to be edited in addition to the content itself.

"Open editing" has profound and subtle effects on Wiki usage. Allowing everyday users to create and edit any page in a Web site is exciting and encourages democratic use of the Web and promotes content composition by non-technical users.

For more information on Wikis, see the `Help` section of the e-Portfolio.

## Discussing content

### Exercise:

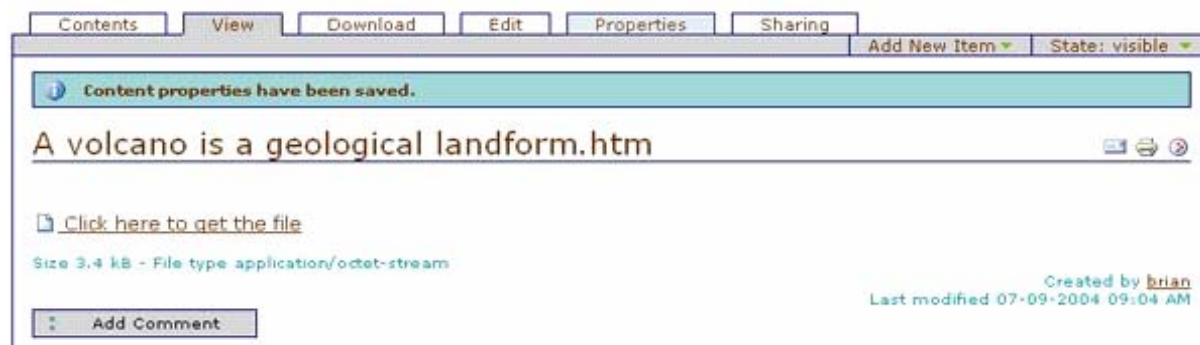
- Create a Wiki and insert a topic of your choice, taken perhaps from the Web.
- Use a WikiWord to link to a second page. (See Help for more information)
- Copy the URL of the Wiki from the address field of the browser.
- Provide the URL to the person sitting next to you and request them to add a comment to your Wiki.
- Browse the Wiki tabs for search, changes and content.

Any piece of content in the e-Portfolio can be discussed. The owner of the content (otherwise known as the person who created it) turns on the discussion feature by clicking on the `Properties` tab of the object and checking `Allow`. Discussion is enabled through a `Comment` button at the bottom of the relevant document or other content.

The `default` radio button is the policy for the content object that has been set by the Site Administrator. If discussion is enabled, when viewing content the discussion will be shown and users will be allowed to comment.

## Searching for content

There are two ways to search for content in the e-Portfolio. At the top of your e-Portfolio site there is



a search box that provides an easy way to do simple keyword searches. You can narrow down the search results by using the **Advanced search** functionality. This is accessible by clicking on the **search** tab at the top of page.

In the **Advanced search** form you are able to query content by a number of attributes including: title, keywords, description, review state, creation date, content type and even author.

The search provides a sophisticated search, with features similar to most search engines. You can make this simple query quite complex. For example, you can use the following options:

**Globbering:** You can use an asterisk to signify any letters. For example, entering **Tue\*** matches *Tuesday* and *Tuesdays*. The asterisk can't be used at the beginning of a word.

**Single wildcards:** A question mark can be used anywhere to signify one letter. For example, entering **ro?e** matches *rope*, *rote*, *role* and so on. A question mark can't be used at the beginning of a word.

**And:** The word *and* can be used to signify that both terms on either side of the *and* must exist. For example entering **Rome and Tuesday** will return a result when both those words are in the content.

**Or:** The word *or* signifies that either term can exist. For example entering **Rome or Tuesday** will return a result when either of these words are in the content.

**Not:** You can use the *not* to return results where the word isn't present. A prefix of *and* is required. For example, entering **welcome and not page** would return matches that contain welcome but not page.

**Phrases:** Phrases are grouped with double quotes (“ ”) and signify several words one after the other.

**Not phrase:** You can specify a phrase with a minus (-) prefix. For example, entering **welcome— “welcome page”** matches all pages with *welcome* in them but not ones that match the phrase *welcome page*.

## Advanced Search

The advanced search function allows additional searching via keywords and refinement through selecting the types of items that you wish to search in e.g. documents, wikis, forums, folders, photo albums etc.

The e-Portfolio will only show 20 returns at a time, as some returns may have hundreds of files. Navigation bars will show at the top and bottom of the results page.

# The Workflow System

Small Text Normal Text Large Text

volcano or ship Search

7 September 2004

Help TAFE VC Groups Samples brian My Folder My Preferences Undo Log out

## Search results

Did you not find what you were looking for? Try the [Advanced Search](#) for more precise search options.

**8 items matching your criteria.**

- Home page for tvcadmin** [100%] by tvcadmin, 29-07-2004 12:13 PM
- The End Is Near** [93%] by tvcadmin, 04-08-2004 08:47 PM  
After several explosions, Lakonia was burning furiously, lighting the clear night sky. The Argentinean Passenger ship, "Salta" was the first to arrive at the ...
- Home page for brian** [81%] by brian, 30-08-2004 07:34 PM
- Johan v Oldenbarnevelt** [80%] by tvcadmin, 16-06-2004 01:22 PM  
Photos from the life of this ship: 1929 - 1963
- Immigrant Ocean Liner** [78%] by tvcadmin, 31-08-2004 06:52 PM  
M.S. Johan Van Oldenbarnevelt story using a PloneArticle method with attached images.
- Immigrant Ocean Liner** [76%] by tvcadmin, 31-08-2004 06:49 PM  
M.S. Johan Van Oldenbarnevelt sank at age 33. A story using a Wiki and a photo

**Recent Items**

- Types of Flowers  
31-08-2004  
More...

**Upcoming Events**

- Types of Flowers  
Ballarat,  
13-09-2004

## Exercise:

- Do a site-wide search for *volcano* and *El Nino*
- Try the different search options for *and*, *or*, *not*, *\**, *-*, *?*.

Workflow is the process used to manage objects in a website. An example is a company's press release: an employee writes a press release and submits it to an editor for review before it is published on the website. This review process is called a workflow and is used by site managers to ensure that site content is correct.

## Object States

An object's state determines whether it is available to the various types of users defined in the e-Portfolio, and what other states that object can be transitioned to. The e-Portfolio default workflow includes four states: visible, pending, published and private.

- By default, objects are created in the `visible` state. All users can find visible objects through the search function and can access them directly by visiting the object URL. Visible objects do not show up in the navigation tree. Visible objects within private folders are still visible to all users and available through the search function. Visible objects are editable by their owners and site managers.

- `Pending` objects have been submitted for publishing by site members. From an end-user standpoint, they behave like objects in the visible state. The difference between the two types is that pending objects are flagged for review; site reviewers are prompted to publish or reject pending objects. Pending objects are editable only by managers.
- `Published` items are visible to all site visitors. They appear in search results and the navigation tree. When a News Item becomes published it becomes visible under the News tab and also in the News box . Published items are editable only by managers, but can be retracted by owners for editing (retracting reverts an object to the visible state).
- Objects in the `private` state are visible and editable only by their owners and others with manager access to the folder in which they exist. They will not appear in search results or on the navigation tree for other users. Private items are editable by managers.

**Note:** Although most objects have their own states, some inherit their states from their parent objects. Forums are an example of this behaviour. Forums within visible or published folders are available to all users through the search function. Forums within private folders are only available to users with access to that private folder.

## User Roles

The e-Portfolio uses roles to define what different users can see and do. In this way, the e-Portfolio builds security into every aspect of its operation. The roles defined include anonymous, member, owner, reviewer and manager.

Anyone who visits the site and does not log in takes on the `anonymous` role. In public sites, anonymous users can see published, pending and visible content by directly visiting a URL or by searching, however only published content is visible on the site navigation tree. If you have set your site up as private, anonymous users cannot see anything.

`Members` are users who have logged in to the site. `Members` have the added ability to create content in their own folder, which is then submitted to site reviewers to be published. In public sites, members can see the same content as anonymous users. In private sites, members have access to published, pending and visible content. Members may also set their own preferences. `Members` have the `owner` role for all content they create. This allows them to edit the content, submit or retract it, or make it private. Assigning the owner role to other users is not recommended.

As a `reviewer`, you can publish or reject content submitted by members. When a reviewer logs in, if there is content to be reviewed a "pending" message will appear in their personal bar. A review list also appears in the right-hand column of the page. Reviewers have access to the same content as members.

`Site managers` can see content in all states (visible, pending, published and private). In addition to all the capabilities of the member and reviewer, managers can add, edit, delete and move content. Managers can also add, edit and delete users and assign them roles.

## Publishing an object

Object owners can alter and edit objects in the `visible` state. Once an owner finishes editing an

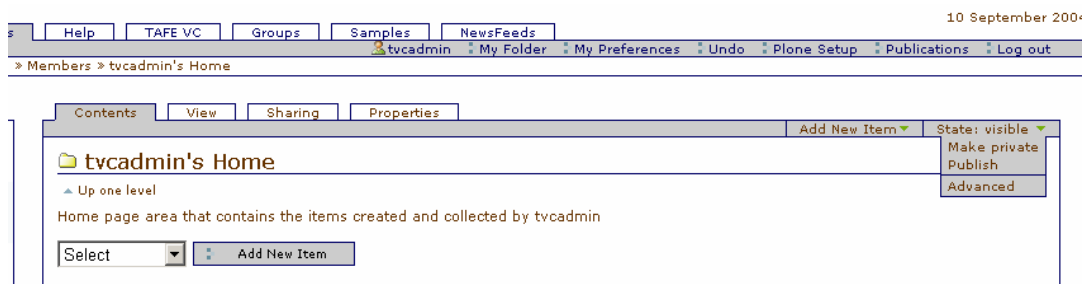
object, it can be published by clicking the `State` pull-down menu.

This menu gives you several options:

- **Status** Tells you the current state of the object.
- **Effective Date and Expiration Date** — The effective date is the first day an object should be made available and the expiration date is the last day. Searches and navigation only show objects within this date range. Leaving these items blank makes an object infinitely available.
- **Comments** — Here you can enter any comments or reason for the change in state you are requesting. These comments will be preserved in the change log for the object.
- **Change State** — The states to which a user can move an object. The states available here will depend on your role. Members can submit objects or make them private. Once submitted, objects are available to users with reviewing privileges, who can then publish or retract them.

## Editing an object after it has been published

Managers may edit objects that are in any state. Members cannot edit an object after it has been published; they must first move it back into a visible state by retracting it. To do this, click on the publishing tab for the object and click `retract`. Then you can edit the object as much as you wish and resubmit it. This ensures that the review process is maintained for objects that have been edited.



## Sharing e-Portfolio Resources

If you've created a bit of content you've added to the e-Portfolio and you want another person to be able to edit it, then you need to give them permission to do it. This is called a *local role* and it allows you to give a user expanded rights on an item.

This functionality is ideal for collaboration. One member can create a specific folder with some content and then give *owner* permission to one or more other members. These members with the new local roles can have full read/write access to the nominated folder but not to anything else in your home folder (although they can view documents if they are visible. Making them private prevents that.)

### Add sharing permissions to groups

Groups are a convenient way to share items to a common set of users. Select one or more groups, and a role to assign.

Available Groups

<input type="checkbox"/>	Name
<input type="checkbox"/>	GROUP1
<input type="checkbox"/>	GROUP3
<input type="checkbox"/>	Group2
<input type="checkbox"/>	cyclotron
<input type="checkbox"/>	plant_search

Role to assign

Created by [salbro](#)  
Last modified 28-07-2004 03:49 PM

### Exercise:

1. Go to the Sharing tab on any folder or item you wish to share.
2. Search for a member you wish to share with. The search can be any part of their name or their email address. Click on the Assign Local Role To Selected User.
3. Inform the user that they now have user access to your folder. The person's email address is shown within the search return.
4. Repeat, if desired for additional persons.

## e-Portfolio Groups

Groups are different from roles. Roles imply that a user has different permissions from someone, but groups are categories of users e.g. a department in a provider can be a group. Plumbing teachers can be a group. Groups can only be created by the site administrator.

## Add Sharing Permission To Groups

When clicking the *Sharing* tab you are provided with the opportunity to *add your content* to a selected group. Note that this does **not** join you as a member to a group, this can only be done by the site administrator. Unless you wish all the members of the selected group to see your content stay away from this section.

This tool allows you to develop content in private and, when it is finished, to add this content to the group selected.

## Using Groups

Using groups is optional. A strong use of groups, however, is to make a *workspace*. The *Sharing* function allows the member to change the *local roles* of individuals to allow them to access their content. However this scale has difficulties when presented with a large group of people. A group can be created on the *cyclotron* which then has a special space, separate from all members' content. This space is accessible by all group members.

*Note: Only the Site Administrator can create groups.*

## Communicating Your Hyperlinks

Sharing your pages with others requires that you are able to tell them where it is. One way of doing this is to click on the little envelope icon shown at the top right of your document. This opens a mail form which asks that you insert your friend's email and any message. The person will then receive the email with the hyperlink automatically inserted.

## Favourites

All members have a *Favourites* folder automatically created when the small icon at the top showing a *right-arrow* is clicked. This icon becomes visible when a document or folder, in the visible state, is opened. The hyperlink is recorded in the *Favourites* folder for future use as a series of bookmarks.

### Final Exercise:

- You wish to send the URL of your created page to a friend. What is the easiest way of doing this?
- You have a number of pages on the e-Portfolio that you wish to bookmark. There is a *favourites* function available. Where is it and how do you use it?
- There are two fast methods of navigating around your content. What are they?
- You have a group with sight-disadvantages. How can you make the e-Portfolio text larger?

## A WORKED EXERCISE 1

### HOW TO DISPLAY YOUR PAGE ON THE INTERNET

This exercise aims to create a Web Page on the Internet to be located within the user's personal folder and viewable by any person, from the Internet, through a specified URL.

#### Overview On Creating the Web Page

- a) Obtain and edit the information
- b) Setting the e-Portfolio Editor
- c) Insert information into e-Portfolio
- d) Gather and save resources (images etc.) into e-Portfolio
- e) Format and complete web page in e-Portfolio.

### Volcano

From Wikipedia, the free encyclopedia.

A **volcano** is a [geological landform](#) (usually a [mountain](#)) where [magma](#)—rock of the earth's interior made molten or liquid by high pressure and temperature—erupts through the surface of the [planet](#). While it is now known that there are numerous volcanoes (some very active) on the [solar system](#)'s rocky planets and moons, on [earth](#) at least, this phenomenon tends to occur near the boundaries of the [continental plates](#). However, important exceptions exist in so-called [hotspot volcanoes](#).



Smoking [Mahameru](#) volcano on [Java](#) in [Indonesia](#).

The study of volcanoes is called [vulcanology](#) (or *volcanology* in some spellings).

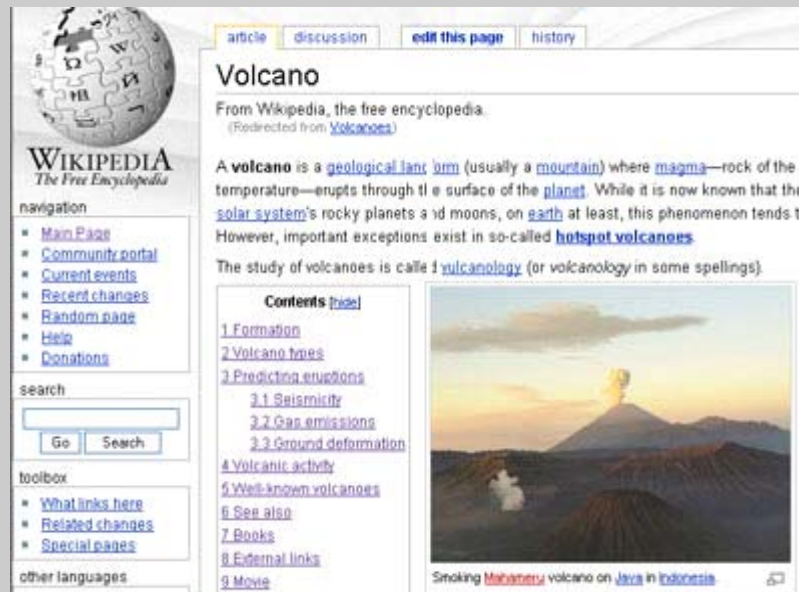
#### Sample from Web

#### Obtain and Edit the Information

The content for the web page will be obtained from an Open Source encyclopaedia called Wikipedia ([www.wikipedia.com](http://www.wikipedia.com)). The content from this site is free for educational and personal use.

Develop an information page about the structure and theory of a range of volcanoes around the world:

- 1) Go to [www.wikipedia.com](http://www.wikipedia.com) and enter the keyword 'volcanoes' into the textfield search form.
- 2) When a relevant page is displayed, using the mouse, block all the text and images that you wish to have in your web page and COPY from the EDIT drop-down list.



#### Body text

Normal



## 2) Setting the e-Portfolio WYSIWYG Editor

- The e-Portfolio has its own WYSIWYG Editor. Log in to the e-Portfolio and click on MY PREFERENCES on the personal bar.
- Within the Preferences page click on PERSONAL PREFERENCES. When this page opens, select EPOZ from the pull-down menu under CONTENT EDITOR.
- Ensure that the other fields, e.g email, are filled in also.

### Creating Multiple Pages

In order that pages are not too long. Create a number of pages. To move from one page to another, hyperlinks can be inserted anywhere.

1. Type the name of the next web page which may be anything like page2\_html, page2, page2.html. This name is derived from whatever is inserted into the SHORT NAME field.
2. Block the name of the hyperlink that you have placed on your page with the cursor.
3. Click on the Globe icon of the Editor toolbar. Insert the name into the field when it appears. Do not prefix it with 'http://?'.  
 4. Click on VIEW of the Contents Window above to view the page as others would see it. Click on the hyperlink, the new page should appear (it should obviously have been created previously).

## Gather and Save Resources (Images) Into the e-Portfolio

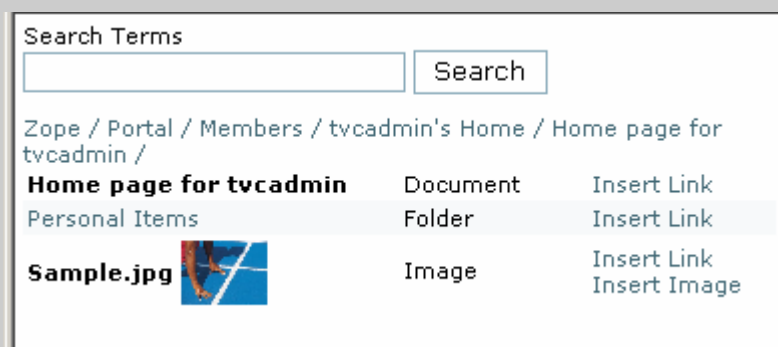
### How To Obtain the Images

Importing images requires a different process to be visible within the e-Portfolio:

1. Go back to the Wikipedia site and place the mouse cursor over the image you wish to save.
2. Press the right button of the mouse and select "SAVE PICTURE AS". Save the image on your hard drive, in the same directory as the information file from the work done above.
3. Repeat for other images.

### Importing the Images Into the e-Portfolio

1. Add images into a folder of your choice from the My Folder Content Frame.
2. Insert images into your document from *Epoz*.



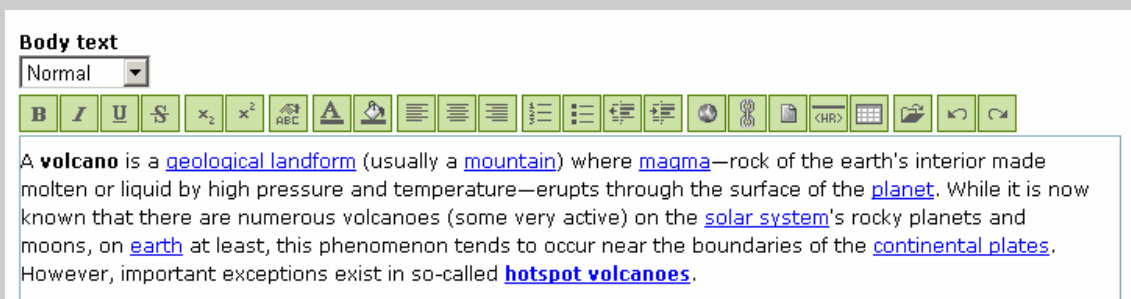
### Formatting the Document

Information can be added into the Editor in a What-You-see-Is-What-You-Get (WYSIWYG) format. However it acts as a HTML editor which means that there are certain restrictions with placements, particularly images.

When the editor renders a page, there is no text flow-around. This can be enabled by using Tables and placing the image in one column and the text in another.

Sometimes it's useful to be able to directly edit the HTML code. At the bottom left of the Editor is a small tick box. Clicking this will show the HTML version of the contents.

e.g. Inserting a particular font with coloured text:



The screenshot shows a rich text editor interface. At the top, there is a 'Body text' label and a dropdown menu set to 'Normal'. Below this is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough), text alignment (left, center, right, justified), bulleted and numbered lists, indentation, link, unlink, table, table of contents, and undo/redo. The main text area contains the following paragraph:

A **volcano** is a [geological landform](#) (usually a [mountain](#)) where [magma](#)—rock of the earth's interior made molten or liquid by high pressure and temperature—erupts through the surface of the [planet](#). While it is now known that there are numerous volcanoes (some very active) on the [solar system](#)'s rocky planets and moons, on [earth](#) at least, this phenomenon tends to occur near the boundaries of the [continental plates](#). However, important exceptions exist in so-called [hotspot volcanoes](#).

HTML Code appears when the radio box is ticked on the bottom left of the *Epoz* Editor. Note how colour and size can be changed. The Editor will accept HTML 4 codes.

**Body text**

```
<P><A <STRONG>volcano</STRONG> is a <A title=Landform
href="http://localhost/wiki/Landform"><FONT color=#0000ff>geological
landform</FONT></A> (usually a <A title=Mountain
href="http://localhost/wiki/Mountain"><FONT color=#0000ff>mountain</FONT></A>) where
<A title=Magma href="http://localhost/wiki/Magma"><FONT
color=#0000ff>magma</FONT></A>—rock of the earth's interior made molten or liquid by
high pressure and temperature—erupts through the surface of the <A title=Planet
href="http://localhost/wiki/Planet"><FONT color=#0000ff>planet</FONT></A>. While it
is now known that there are numerous volcanoes (some very active) on the <A
title="Solar system" href="http://localhost/wiki/Solar_system"><FONT
color=#0000ff>solar system</FONT></A>'s rocky planets and moons, on <A title=Earth
href="http://localhost/wiki/Earth"><FONT color=#0000ff>earth</FONT></A> at least,
this phenomenon tends to occur near the boundaries of the <A title="Plate tectonics"
href="http://localhost/wiki/Plate_tectonics"><FONT color=#0000ff>continental
plates</FONT></A>. However, important exceptions exist in so-called <STRONG><A
title=Hotspot href="http://localhost/wiki/Hotspot"><FONT color=#0000ff>hotspot
volcanoes</FONT></A></STRONG>.</P>
```

## A Worked Exercise 2

### Discovering Plants

This exercise demonstrates a linkage between TAFE VC resources and the e-Portfolio. In the e-Portfolio, a *Group* has been created and members allocated to it. All members have access to the space.

Each member creates their own version of an assignment. In the original course, students were required to print it out, fill in the details and then fax it to the teacher.

The e-Portfolio allows each student to fill in the details electronically and then simply provide the URL to their teacher for checking.

There are many ways of achieving the same thing within the e-Portfolio. A teacher can create a folder and make the folder available to the relevant students. The student can then simply put their personal version into that folder for the teacher to access.



1. Go to **Groups** and click on **Plant Groups Workspace**
2. Click on **Plant Discovery**
3. Click the **Contents** tab
4. Tick the box next to the **Plant Discovery** document
5. Click **Copy** and then click **Paste**
6. A copied version of the original document appears at the bottom of the contents frame. Click the tickbox next to it and click on the **Rename** button.
7. Rename both the search name and Title from **copy\_of\_plantsearch** to **<membername>\_plantsearch** and **<membername> Plant Discovery**.

The document is now your own copy and editable by you. Go to the **Plant Discovery** resources by accessing the link below:

[http://www.tafevc.com.au/toolbox/conservation/html/pages/unit/unit\\_08/act1/index.htm](http://www.tafevc.com.au/toolbox/conservation/html/pages/unit/unit_08/act1/index.htm)

## A Worked Exercise 3

### A Tourism Project

The aim of this project is to *Research Information About International Tourist Destinations*.

1. Your team will investigate one country in each of the regions listed below. You may travel to the countries in any order you wish. Consider using a world map and marking each country chosen.
  - Africa
  - Europe Central and South America
  - Asia (includes Southeast and Southwest Asia)
  - Polynesia and Oceania (including New Zealand)

2. As an individual research team member you will conduct research relevant to your position. You will:
  - meet with your team members and organise a student group presentation for each country.
  - Be creative, interesting, and informative.

One way of doing this is to combine a forum with a Wiki, the forum to communicate directly and the Wiki to provide more extensive information allowing input from others. Of course, the sharing function of the e-Portfolio can assist here.

3. Each team member will maintain a travel log describing their research and impressions of the country they are investigating.

A Wiki again is a good way of maintaining a flow of information. Other methods that could be used here include a PloneArticle to create a noticeboard-type arrangement or a Photo Album.

4. The teacher, in consultation with team members will organise for each research team to give all five of their presentations.

The PloneArticle and the Photo Album are the key objects to be used here. Don't forget also the Document object which allows a number of pages to be presented on the Web.

5. The teacher and the full student group will determine the criteria for judging each country. Create a scoring sheet to be used by each student to score each presentation and rate the country. Save the scoring sheet for the final evaluation and choice of five countries to award.

The Forum object has a Poll function that would be very useful here.