



Web Site Mini-Guide: Document Vault

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Overview

Over time, you'll create a collection of useful resource material that you can offer to other people. Even if it's not original material, it's still valuable to your clients because it's been selected and organised by you.

The Document Vault allows you to organise this material into a hierarchy, and present it to users. You can either make it fully public, fully private, or a mix. Here is an example:

Document Vault

Member Password:

| | |
|--|--|
|  <u>Book Shops</u> 8 |  <u>PowerPoint</u> 58 |
|  <u>Business Success</u> 61 |  <u>Psychology</u> 2 |
|  <u>Internet</u> 19 |  <u>Quotations</u> 14 |
|  <u>Language</u> 11 |  <u>Reference</u> 40 |
|  <u>Magazines</u> 7 |  <u>Search</u> 10 |
|  <u>News</u> 14 |  <u>Writing</u> 9 |

Total: 253

When somebody clicks a category sub-heading, they see the documents in that category:









Document Vault

Member Password:

[Home](#) / [Business Success](#)

 [Marketing](#) 32

(Log in above with your member password to view items)

-  [Babson College: Arthur M. Blank Center for Entrepreneurship](#)
-  [Business Entry Point](#)
-  [Business NSW](#)
-  [Business Planning Center](#)
-  [Business Publications](#)
-  [BusinessThinkers](#)

Some of the material in this vault is only accessible with a password.

Planning the Organisation

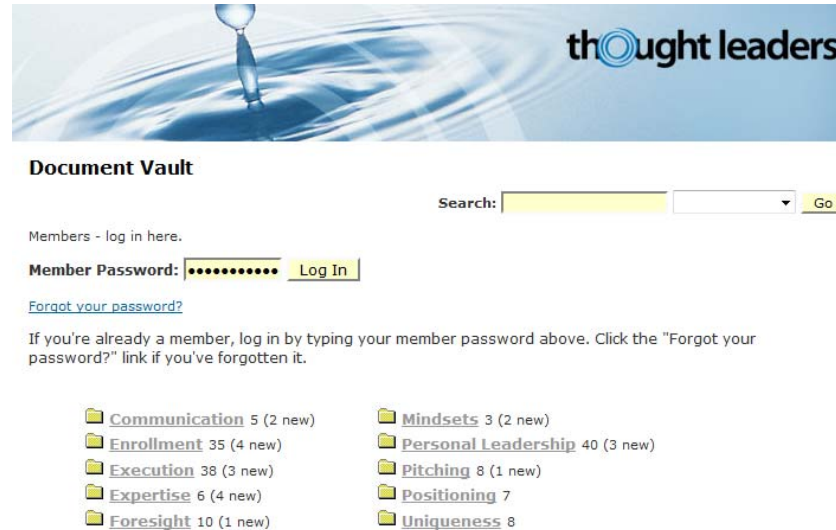
Before you start filling up your vault, it's worth putting some thought into how you will organise the material. A bit of careful thinking now can make it so much easier for users to find information, and it also makes it easier for you to store information in the future.

Broadly, you can organise your material in three ways: For browsing, tagging or sharing. In general, you can use all three methods to give your users maximum flexibility.



Browsing

The default option is **browsing**, where you organise your material in a hierarchy of documents, which users can browse by clicking through headings and sub-headings:



This method has three advantages:

- It's clear and neat, and easy for your users to understand.
- It's useful for users who are browsing the vault to see what's available.
- It's useful for users who only have a vague idea of their needs, and don't know exactly what to search for.

However, it has one major drawback: It relies on you and your users thinking the same way.

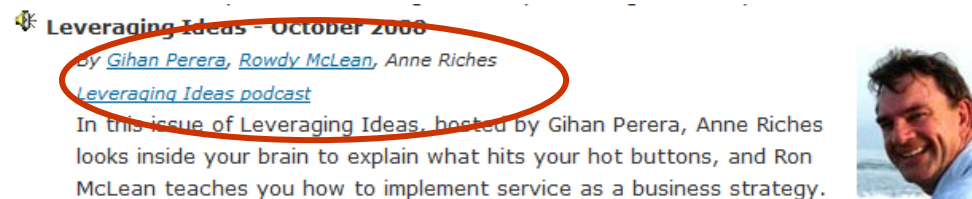


A related drawback is that some items can reasonably belong in more than one place in the hierarchy. For example, does an article “Personal Branding for Entrepreneurs” belong in the Entrepreneur section or the Branding section? The answer is, of course, both. This leads to the next option.

Tagging

Because items in your vault can be classified in different ways, **tagging** allows you to put labels, or “tags”, on each. This makes it easy for your users to easily find all items with the same tag. This is common on Web 2.0 sites like YouTube, Flickr, Blogger and Wikipedia. You can do the same, choosing appropriate tags for each item.

For example, on the Thought Leaders membership site mentioned earlier, items are tagged with the author’s name, the source and other relevant keywords. This makes it easy for users to quickly find other items by the same author, from the same source, or on the same topic. Here’s an example:



Tagging helps to solve the problem of a single hierarchy. However, users are still restricted to finding material by the tags *you've* chosen for them.



Searching

The third option is one I'm sure is familiar to you: **searching**. Users can search for words and phrases, or can search by time frame:

Search:

- Last 7 days
- Last 2 weeks
- Last month
- Last year

Planning the Access

You can choose to protect certain material, so it's only accessible with a password. You can protect individual items or an entire branch of the hierarchy. You can also use different passwords for different parts of the vault.

Broadly, there are three levels of protection:

- By default: Anybody can see a summary of the item but can't see the details if they don't have a password. This is useful if you want to allow the public to browse the vault to see how much is in there, before they are given a password.
- Private: These items aren't visible at all without a password – not even their summary.
- Public: These items are fully visible, even without a password.

Independently of this, you can also mark any item as "hidden", which means it's not visible to anybody at all. This isn't really for protection; it's more for temporarily hiding something – e.g. if

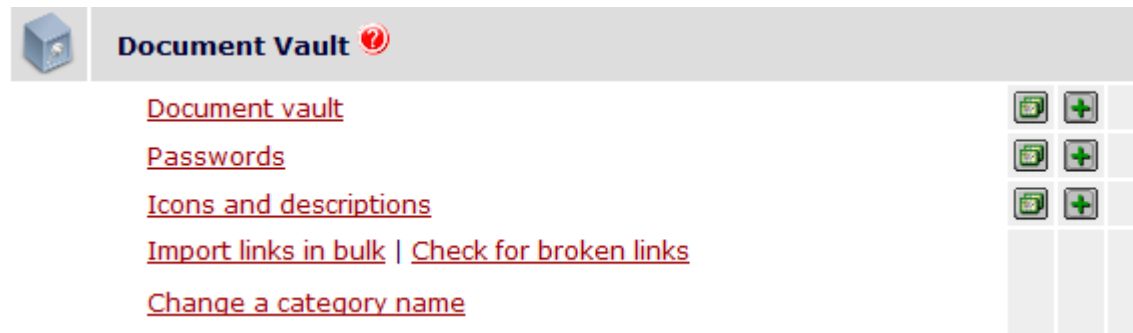


you've only half-completed it; or if you're planning to load a lot of material in bulk but release it in stages.

Administration

This is a First Step Plug-Ins facility. If we built your Web site, it will be available on your normal administration page. If we didn't, log in from www.eservice.com.au, www.fsplugins.com or www.fsplugins.net, depending on where your account is hosted. If you're not sure, please check with First Step.

After logging in, scroll down to the Document Vault section to start:



Adding a New Document

To add a document to an existing category, browse the document vault from the administration area until you find that category. Then click the Add button at the bottom of that page:














Document Vault

[Home](#) / [Language](#)

[See the public version of this page](#)

[See all items on one page](#)

| | | |
|------------------------------------|--------|---|
| Delete | Change |  BuzzWhack |
| Delete | Change |  Dictionary of Difficult Words |
| Delete | Change |  Glossarist.com |
| Delete | Change |  Lexical FreeNet |
| Delete | Change |  OneLook Dictionaries, The Faster Finder |
| Delete | Change |  Oxford English Dictionary Word of the |
| Day | | |
| Delete | Change |  Roget's Thesaurus |
| Delete | Change |  Useless Knowledge |
| Delete | Change |  Visual Thesaurus |
| Delete | Change |  Vocabulary |
| Delete | Change |  WordBot |
| <input type="button" value="Add"/> | | |

To add a document to a new category (e.g. a sub-heading of another category), browse to the nearest page and click the Add button.

Then fill in the form as follows:

- **Category:** By default, this shows the current category for the document. You can change this by choosing from the drop-down menu, or by changing the category in the Other field.

Note that sub-categories are separated by a "/" character – e.g. Business Success/Marketing. Do **not** use "Home" to indicate the top level of the hierarchy – this is implied.

- **Title:** The document title.
- **Type:** The document type:



- Link (Web site address): Use the Web Address and Summary fields. See below for a special facility to upload links in bulk.
- Article: Summary in the Summary field; full body of the article in the Details field.
- FAQ (Frequently Asked Question): Summary in the Summary field; question in the Question field; answer in the Answer field.
- Document (e.g. PDF, Word, Excel): This is for documents already uploaded to the Web. Put the Web address in the Web Address field; summary in the Summary field; a more detailed description in the Details field.
- E-book: This is usually as for Document. However, some e-books are “animated e-books” on a Web page, rather than downloadable e-books (e.g. see the sites www.issuu.com and www.scribd.com, which produce e-books in this format). In this case, you can specify it like an audio or video clip – see more detailed description below.
- Picture: This is for graphics that have already been uploaded to the Web. So put the Web address in the Web Address field, a summary in the Summary field, and a detailed description in the Details field.
- Audio: See more detailed description below.
- Video: See more detailed description below.
- Slide Show: See more detailed description below.
- Book: As for Document.
- Access: This determines how people who *aren't* logged in see this document:
 - Leaving it blank (default): They can see the title and summary, but nothing else.
 - Public: They can see the item in full.
 - Private: They don't see the item at all.



- **Flags:** Currently unused, but can be used to set various “flags” for a document.
- **Hide:** Tick this box to temporarily hide the item. This overrides the Access setting.
This is useful if, say, you upload a document that you’d like to release some time in the future; or, say, you might be linking to a Web site that’s temporarily inaccessible.
- **Priority:** This is another optional field, which affects the order in which items appear on the page.
By default, the items are listed in alphabetical order, but you can change this by specifying a number here (Lower numbers are higher priority, so 1 is the highest priority). In that case, the items are sorted by priority, and items without a priority number appear at the end, sorted alphabetically as before.
- **Authors:** A comma-separated list of authors. All the previously-selected authors appear conveniently in a list below this, so you can click on them to choose them quickly. When the item is displayed, each author’s name is clickable, which is a quick way for users to see all items by that author.
- **Tags:** A comma-separated list, which works just like the Authors.

Adding blocks of text to a page



You can display arbitrary blocks of text on the page. To do this, choose the Category field, **leave the Title field blank**, and type in the text in the Summary field and the Details field. The Summary text appears if the user isn’t logged in; the Details text appears if they are.

You can also use the Priority field to position each block on the page. It will appear in priority order, just like other items on the page.






For example, here's a page with two blocks of text:

This text appears at the top ...

-  [Fail Fast - Succeed Often](#)
-  [Traction, Action and Satisfaction](#)

This text appears further down ...

-  **Nobody's perfect!**
-  **How to leverage your time when you're too busy**
-  **Are you wasting your time with low-return activities?**

The first block ("This text appears at the top ...") has priority 1, and the second has priority 30 (which puts it between two other items with priority 20 and 45 respectively).

Audio Clips, Video Clips, Slide Shows and Animated E-Books

You have three choices for the way you make them visible to users:

- Provide a link for users to download the file (the simplest option).

To do this, you must upload the clip to the Web somewhere, and then provide a link to it in the Web Address field. This identical to the Document or E-Book type above.

- Make the clip playable in a Flash player, like this:





To do this, you must upload it using a service that creates the Flash player for you – e.g. www.hipcast.com, Sonic Memo, www.audiogenerator.com, YouTube, Google Video, etc. See the *Media Clips User Guide* for more information.

All of these services provide some Flash code to embed in a Web page. Copy and paste this code into the Additional Information field. For example, it might look like this:

```
<embed style="width:400px; height:326px;" id="VideoPlayback" type="application/x-shockwave-flash" src="http://video.google.com/googleplayer.swf?docId=-7199158973758073420&hl=en"> </embed>
```

- Both of the above. Use the Web Address field for the direct download link, and the Additional Information field for the Flash code.

As usual, you can use the Summary and Details fields for a summary and detailed description, respectively.

Adding Links

It's common for a document vault to contain a lot of links to other Web sites. If this is the case, there's a special facility for uploading these links in bulk, because it can be slow to add them one at a time.

To prepare, add the links to an Excel spreadsheet, like this:



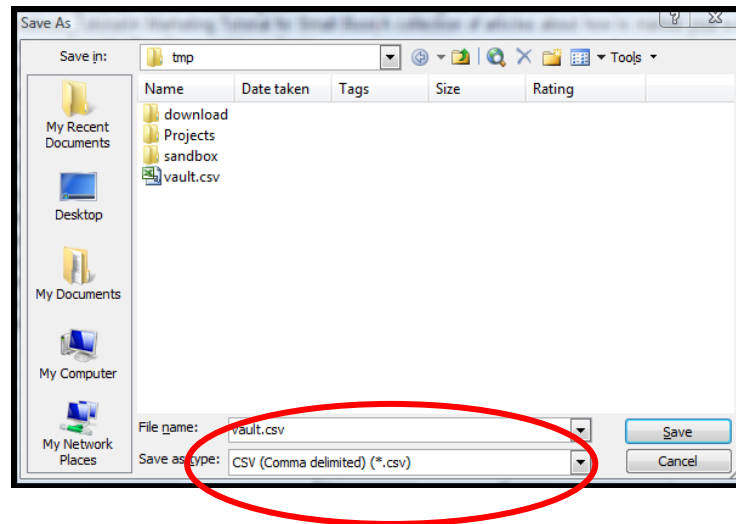
| | A | B | C | D | E | F |
|---|-------------------------------------|---|--|---|---|---|
| 1 | Category | URL | Title | Description | | |
| 2 | Creating Products/Audio/Podcasts | http://www.podcast.net/ | Podcast.net | A searchable directory of thousands of podcasts. Use it | | |
| 3 | Creating Products/Audio/Podcasts | http://en.wikipedia.org/wiki/Podcast | Wikipedia: Podcasting | Introduction to podcasting - from Wikipedia | | |
| 4 | Creating Products/Audio/Podcasts | http://tech.groups.yahoo.com/group/p | Podcasters Mailing List | A mailing list for podcasters and podcast listeners to co | | |
| 5 | Creating Products/E-Books/Marketing | http://website101.com/eBook_Tutorial | Book Marketing Tutorial for Small Busi | A collection of articles about how to market your e-book | | |
| 6 | Creating Products/Books | http://pragdave.pragprog.com/pragdave | PragDave: Writing a Book | | | |

The spreadsheet has these four columns:

- **Category:** The category in the document vault. If this category doesn't exist, it will be created. Sub-categories are separated by a "/" character – e.g. Creating Products/Audio/Podcasts. Do **not** use "Home" to indicate the top level of the hierarchy – this is implied.
- **Web Address:** The Web site address.
- **Title:** The title of the item.
- **Description:** The summary description of the item.

When you've finished, save the Excel file. Then save it again in CSV (comma separated value) format using the Save As option:





Then log in to the Document Vault and choose the option to import links in bulk. Fill in the form as follows:

- Details: Leave this blank because you're using the CSV file.
- CSV file: Browse for the CSV file you created and open it.
- Access and Hide: These have the same meaning as described above for adding items.

Click the Continue button to upload the links. They will be added to the vault.

The system checks for duplicate links and discards them (and warns you that it has done so).



Setting Passwords

If your entire vault is public, it's not necessary to set passwords. However, if you'd like to restrict access to the vault, you can use the password facility.

To add a password, from the administration page, click that option:



This shows this form:

| | |
|------------------------|--------------------------------------|
| Password | <input type="text"/> |
| Comment | <input type="text"/> |
| Access To | ALL <input type="button" value="v"/> |
| Subscriber List | <input type="text"/> |

- **Password:** This is a unique password for a particular section of the vault. Passwords are not case-sensitive, and can contain any characters. For ease of use, though, we recommend you stick to letters and digits only – no punctuation.



Note: Passwords must be unique. So if you want two separate areas of the vault to be accessible by the same password, you need to put them under a new common category and then apply the password to that new category.

- Comment (Optional): An internal comment for you to remember what this password refers to. It's never displayed to users.
- Access To: Choose which areas of the vault are accessible using this password. The default ALL gives access to the entire vault. You can also choose any category from the drop-down list, which restricts access to that category and any sub-categories within it.


If you restrict access in this way, somebody using that password can still browse the rest of the vault, but will only see what the public can see, except in their area of restricted access.

- Subscriber List (Optional): This allows you to link a password with a particular list of subscribers in your system. Anybody who's in this list will be able to retrieve this password automatically by e-mail.

For example, if you've got a membership site, you can use the Document Vault to store password-protected resources for users. You'll probably have a CourseBot subscriber list for your users so you can send them regular messages. By choosing that list from the drop-down menu, anybody who's on that list can retrieve this password easily. It means you can change the password as often as you like, and they won't have to keep asking you for it.

Changing the Folder Icons



By default, all the categories have a little yellow folder icon  next to them. But you can create your own icons for any category – for example:



To do this, first create the icons graphics as GIF, JPG or PNG files. The default icons are 16 pixels square, but you can make them bigger if you wish.

Then upload them to a Web server, so they have a unique Web address.

Then, from the administration page, choose the option to add an icon:



This gives you a very simple form to fill in, where you choose the category from a drop-down menu, and then paste in the Web address of the icon you'd like to choose.

Public View

To give people a link to the vault, start from the Home page of the vault and click the "See the public version of this page" link:



Document Vault

[See the public version of this page](#)

[See all items on one page](#)

| | |
|---|---|
|  Book Shops 8 |  PowerPoint 58 |
|  Business Success 61 |  Psychology 2 |
|  Internet 19 |  Quotations 14 |
|  Language 11 |  Reference 40 |
|  Magazines 7 |  Search 10 |
|  News 14 |  Writing 9 |

Total: 253

This opens a new window, and you can copy the Web address from that window.

The “See the public version of this page” link appears on **every** page within the vault. So if you’d like to give people a link to a particular category, find your way to that category before clicking the “See the public version of this page” link.

Customise the Password Text

If somebody hasn’t logged in, they see a Member Password box asking them to log in. You can customise the text that appears before and after this box – e.g.



Document Vault

This document collection is available in the First Step Member Community. If you're already a member, log in by typing your member password below. If you're not a member, [find out more about membership here](#).

Member Password:

 [Audio Files](#) 7 (new)

 [Podcasting](#) 62 (new)

 [E-Mail Newsletter](#) 1 (new)

To do this, use the Global Replace module to create two items with identifier "vault-login" and "vault-login2", corresponding to the HTML code you'd like to display above and below the password field, respectively.

For example, to make the text appear in a box (as in the example above), the "vault-login" item opens a table and shows some text:

| | |
|---|--------------------------------------|
| Title | Document Vault Login |
| Text HELP | |
| <pre><table border cellpadding=10 bgcolor="#ffffff"><tr><td bgcolor="#ffffff"> This document collection is available in the First Step Member Community. If you're already a member, log in by typing your member password below. If you're not a member, [*http://www.firststep.com.au/membership.html find out more about membership here].</pre> | |
| Visible? | Yes <input type="button" value="v"/> |
| Identifier | vault-login |



and then "vault-login2" just closes the table:

| | |
|---|------------------------|
| Title | Document Vault Login 2 |
| Text HELP | |
| <pre></td></tr></table></pre> | |
| Visible? | Yes ▾ |
| Identifier | vault-login2 |

Renaming/Moving Categories

Sometimes you'll change your mind about the initial categories you chose. You might want to rename one, move it into a different part of the hierarchy, or do both. You can do this using the "Change a category name" link on the administration page. You'll see instructions there, including examples.

Be careful when you do this, because you're potentially changing a lot of items all at once, and you can't undo it.

You'll also break existing links, if any, to the old category, so be sure to adjust these links as well. In particular, you might have to re-assign icons you've assigned to that category.



Checking Links

If your vault contains a lot of links to Web sites, it's useful to check it regularly to ensure the links are all valid. Use the "Check for broken links" option to start this operation.

This is not a completely automated process, because some links are only temporarily "broken". So, for each reported broken link, you have to manually decide whether to keep it, change it or delete it.





More Help

- Frequently Asked Questions: <http://first-step-support.info/>
- Help Desk <http://firststep.com.au/help-desk.html>
- Other support options: <http://firststep.com.au/support.html>
- Consulting: <http://gihanperera.com/consulting.html>
- Products: <http://gihanperera.com/products.html>
- Other User Guides: <http://www.firststep.com.au/fast-forward-guides>



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