

Guidelines for work on the Genebank KB site

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These guidelines are written for users of the Crop Genebank Knowledge Base (KB) website that have administrative access. The KB is built using the open source [Joomla](#) content management system. With this system there is a front-end and a back-end to the website.

The front-end is the site as you can see it at <http://croptgenebank.sgrp.cgiar.org/>. Users can login at the home page and edit (add/change text, insert images or files) pages directly if they have the right access privileges. (See picture below)

The screenshot shows the homepage of the Crop Genebank Knowledge Base. At the top, there is a search bar and a navigation menu with links for Home, Crops, Procedures, Management strategies, and Learning resources. The main content area features a large article titled "Improving the management of genebanks" with a photo of a seedling tray and text discussing genetic diversity and genebank management. To the right of the article is a sidebar with social media sharing options and a list of links including Genebank Blog, Genebank news, Discussion forum, Pictures, Editor's corner, and CGKB wiki. Below the article, there is a section for "Main sections of this site" with a "Procedures" link and a list of site sections: CROPS, PROCEDURES, MANAGEMENT, and LEARNING RESOURCES. A red arrow points from the "Editor's corner" link in the sidebar to the "Procedures" link in the "Main sections of this site" section.

This guide is written for users that have access rights to the back-end of the site. When a user accesses the back-end of a Joomla site a control panel opens which allows to make changes to the structure of the site (e.g. adding/changing menus, creating pages, customizing components or templates)

(For more information on registered users and their access levels, see “Adding a new user”)

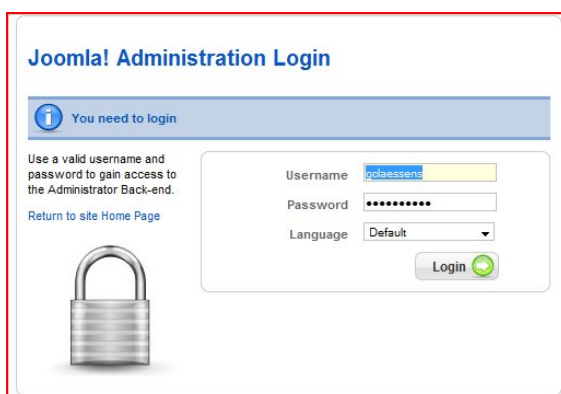
A brief guide about development of a Joomla site can be found by clicking on: http://help.joomla.org/gshop/feb2008/task048/joomla_15_quickstart.pdf

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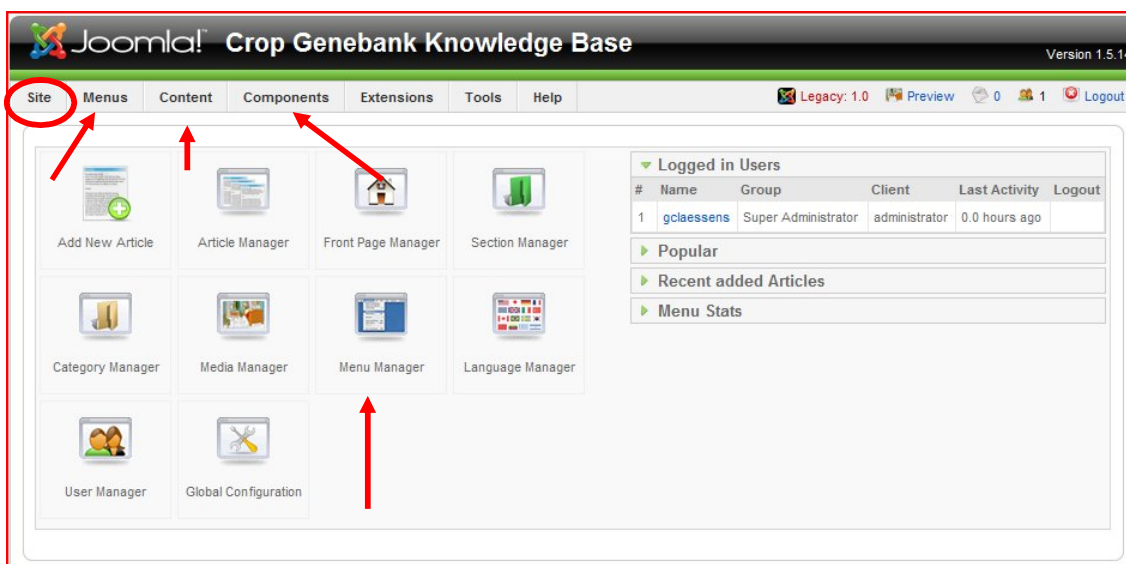
1. Introduction to the control panel

Login to the control panel at <http://croptgenebank.sgrp.cgiar.org/administrator>. Type the username and password that was given to you and click login.



The screenshot shows the Joomla! Administration Login page. At the top, it says "Joomla! Administration Login". Below that, there is a message "You need to login" with an information icon. The main content area contains a form with the following fields: "Username" (with the value "gclaeessens" entered), "Password" (masked with dots), and "Language" (set to "Default"). A "Login" button is located at the bottom right of the form. To the left of the form, there is a padlock icon and a link "Return to site Home Page".

Below is a screenshot of the “site control panel” of the control panel. You can always return here by clicking on Site in the top left corner and then selecting control panel. (See red circle)



The screenshot shows the Joomla! Control Panel for the "Crop Genebank Knowledge Base" (Version 1.5.14). The top navigation bar includes "Site", "Menus", "Content", "Components", "Extensions", "Tools", and "Help". The "Site" menu item is circled in red. Below the navigation bar, there is a grid of icons for various management tasks: "Add New Article", "Article Manager", "Front Page Manager", "Section Manager", "Category Manager", "Media Manager", "Menu Manager", "Language Manager", "User Manager", and "Global Configuration". Red arrows point from the "Site", "Content", and "Menu Manager" icons to the "Site" menu item in the navigation bar. On the right side, there is a "Logged in Users" table and several expandable sections: "Popular", "Recent added Articles", and "Menu Stats".

#	Name	Group	Client	Last Activity	Logout
1	gclaeessens	Super Administrator	administrator	0.0 hours ago	

For most of the actions we will only use the following items:

- Menu: To create or move menu items.
- Content: To add or change webpages.
- Components: To work in the links, contacts, glossary or in other components
- Media manager: To add pictures, flash or video files and documents or PDF's

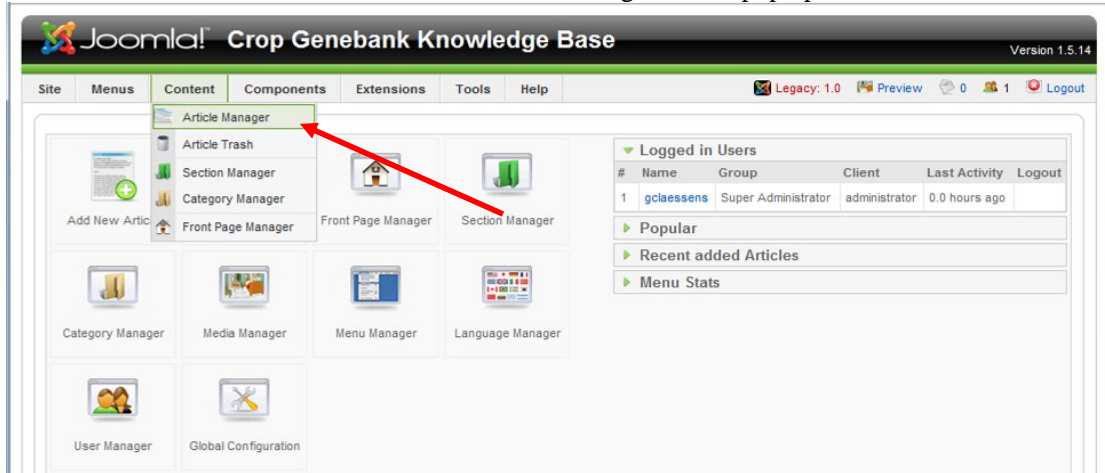
2. Viewing the existing content (pages)

The content of a Joomla site is organized in three levels:

- **Sections** are big containers; they hold Categories.
- **Categories** are little containers; they hold Content Items.
- **Content** Items are all the text and images you want to appear on a page.

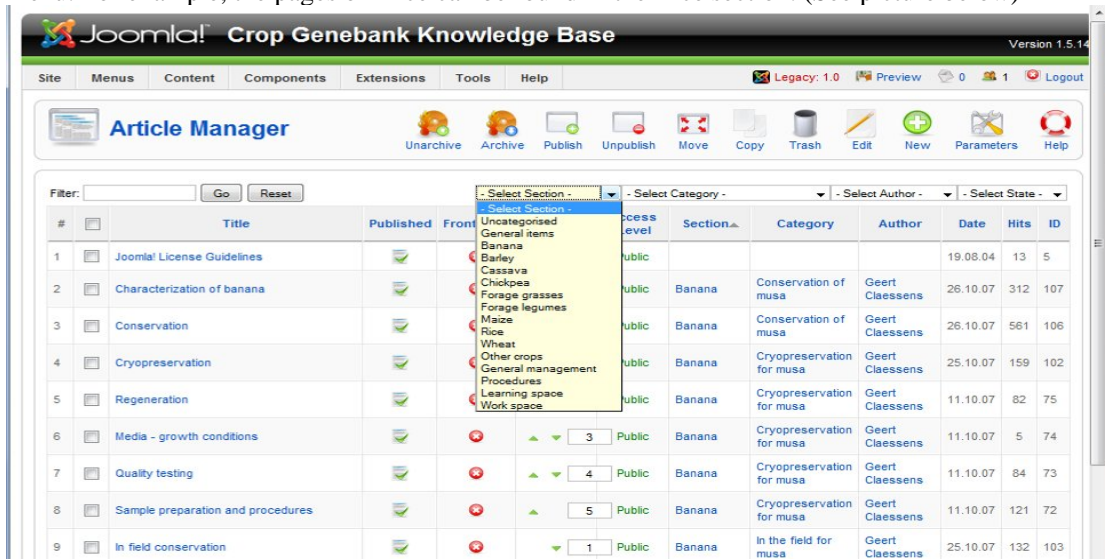
Compare it with a filing system: Sections are drawers, Categories are folders, and Content Items are pieces of paper. So to keep things organised, all papers (Content Items) are inside folders (Categories) which in turn are inside drawers (Sections).

Roll the mouse over “Content”. Click on “Article Manager” in the pop up menu.



The article manager shows all the section and categories of the KB. (General items are for the items on the home page.) But extra sections or categories can be created in the section or category managers if needed.

To quickly find the article you are looking for, select the right section in the section drop down menu. For example, the pages on Rice can be found in the Rice section. (See picture below)



When you click on Rice, the following screen will appear. You now see a list of the Content Items in a certain section, (in this example the Rice section) including the following information:

#	Title	Published	Front Page	Order	Access Level	Section	Category	Author	Date	Hits	ID
1	Cultural practices for characterization of wild rice			1	Public	Rice	Characterization	Selam Alemayehu	15.05.09	112	360
2	Cultural practices for characterization of cultivated rice			2	Public	Rice	Characterization	Selam Alemayehu	15.05.09	116	359
3	Characterization of cultivated rice, wild rice and related genera			3	Public	Rice	Characterization		14.11.08	592	203
4	Conservation of rice genetic resources			1	Public	Rice	Conservation		14.11.08	745	202
5	Sample processing and viability in field banks (cultivated rice)			1	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	04.05.09	17	333
6	Storage in field banks (cultivated rice)			2	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	04.05.09	22	332
7	Field bank (cultivated rice)			3	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	01.05.09	39	330
8	Seed bank for cultivated rice genetic resources			4	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	20.02.09	343	291
9	Health diagnosis of rice genetic resources			5	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	20.02.09	189	289
10	Transgenes in cultivated rice, wild rice and related genera genetic resources			6	Public	Rice	Conservation - Cultivated Rice	Selam Alemayehu	20.02.09	198	290
11	DNA bank for cultivated rice, wild rice and related genera genetic resources			7	Public	Rice	Conservation - Cultivated Rice		14.11.08	271	210
12	In vitro bank (cultivated rice, wild rice and related genera)			8	Public	Rice	Conservation - Cultivated Rice		14.11.08	136	207
13	Registration of cultivated rice, wild rice and related genera genetic resources			9	Public	Rice	Conservation - Cultivated Rice	Geert Claessens	27.01.09	293	269

Title: This is the title of the content item. This is where you should click if you like to change the content of that particular page.

Published: This shows whether the item is Published or not. Click to change its state.

Reorder: Click the Up and Down arrow buttons to move the item up or down in the list. (This is only useful for organizational purposes.)

Access: This is the user Access Level for the Content Item. Click on the Access level to switch it to Public, Registered, or Special. Public means that everyone can see that page. Registered means that one needs to login to view this page. With Special you can define a group of users that can view that page.

Category: This is the Category associated with the Content item.

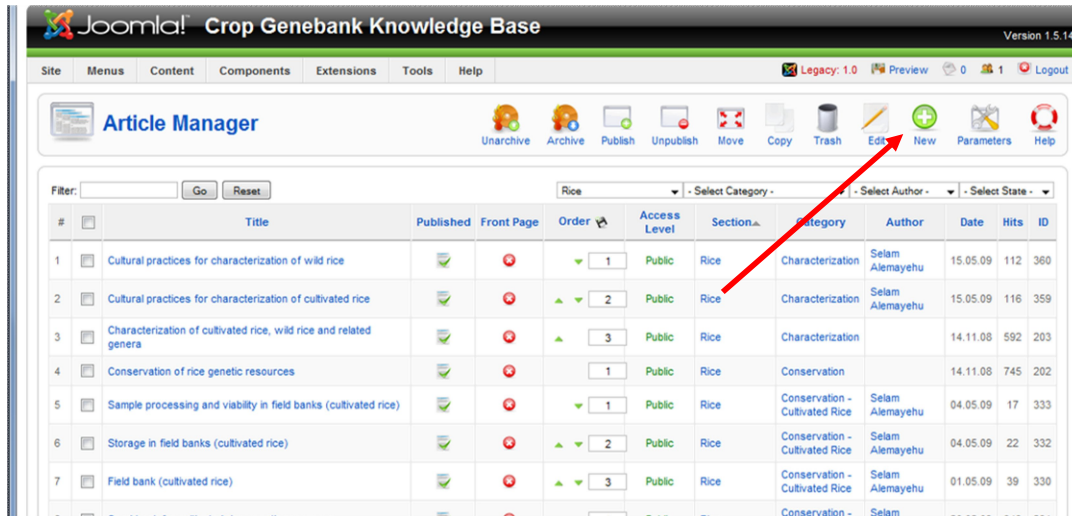
Author: This shows the name of the creator of that Content item.

Other functions available on this screen include:

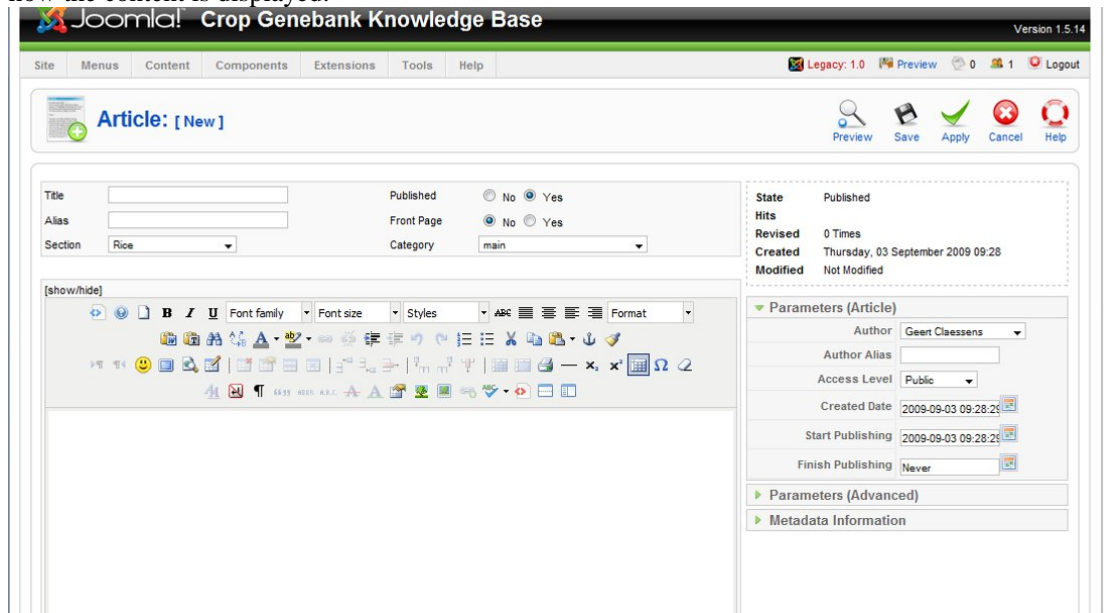
A filter box to refine the list based using keywords found in the title of an item. (To do this, type in a word and press the Tab key.) You may also filter the list according to a particular Author or Category by selecting one or more combinations from the drop down boxes.

3. Creating new content (a new page)

Go to the section where you want to add a page and click New in the toolbar.



This screen is divided into two main areas. The left hand side is used to input text, image tags, and other content. The right hand side handles a number of parameters, which control what and how the content is displayed.



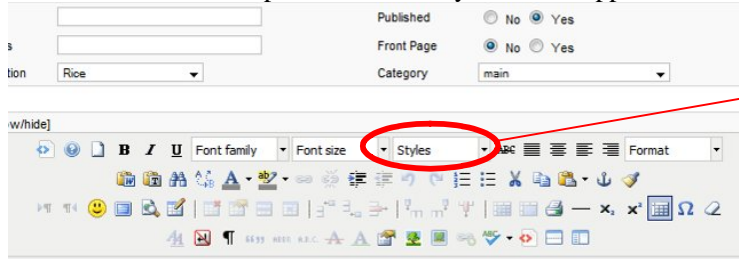
Start by completing the following fields: Title, Section and Category

Remember every newly created page has to be placed in the right section and category. Every section contains at least the category “main”. This is for general items content items or for temporary purposes. After filling out the necessary information, text and images can be added in the first window. (See following chapters for more information.)

IMPORTANT: Do not forget to click **Save** to save the data and to return to the previous screen or **Apply** to save but to remain on that screen. (**Cancel** if you wish to discard.) **If an item (page) is not properly closed, it cannot be opened by another user!**

4. Layout of a page: Applying styles

Once text is inserted as plain text, then styles can be applied to the different blocks of text.



Highlight text then apply the right style to it. Do NOT select a format, font or size!

Follow the styles and lay out of the other pages. A general page on the KB looks like the picture below:

Registration of germplasm

[Contributors to this page.](#)

Provide guidelines and recommendations about the best practices for the daily management of genebanks, describing the most important procedures during the registration of forage legumes. Best practices are shown with bullets. Justification for each is given within brackets

Verifying accompanying documentation

A minimal documentation is essential to track germplasm materials. Health and IPR certificates are very important for entry to the country. The following documents should accompany each consignment of plant germplasm:

- ▶ List of accessions
- ▶ Phytosanitary certificate
- ▶ Plant import permit
- ▶ GMD free certificate (if there are GMOs in the crop) (For more information, click [here](#))
- ▶ SMTA or germplasm acquisition agreement (SMTAs: [Plant treaty](#), [SGRP](#))
- ▶ Passport data

Verification of consignment

This is important to verify the legitimacy of the materials, to avoid the introduction of new pests and diseases and the storing of dead material and also to assure that only seeds that appear in good condition and have a high probability of being viable should be registered. The second step is also very important to avoid conserving duplicates and to have complete information on genebank accessions. This data enhances the value of the germplasm.

Check germplasm:

- ▶ Check all packets against the list provided with the samples.
- ▶ If no list is provided or seeds do not correspond with the list, prepare a list and send to donor/provider for confirmation and obtaining the proper data.
- ▶ Check seeds for insect infestation or obvious signs of disease or damage during shipping.
- ▶ Isolate the infested/infected samples: destroy when quarantine diseases and/or insects; otherwise clean the seeds before storage using fumigation to control insects.
- ▶ If possible, ask donor to replace sample.

Check Genebank:

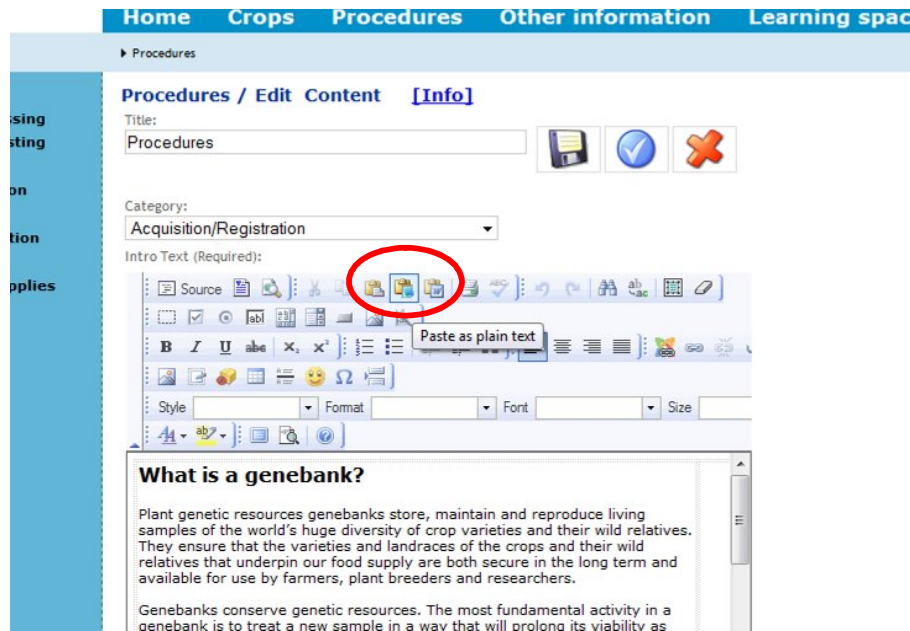
- ▶ Check genebank database for duplication, i.e. if the sample is already conserved in the genebank.
 - ▶ a. If it is, assign a new seed lot under the original accession number (of suspected duplicate). The 'duplication' will be verified later (at first growth out and/or characterization).
 - ▶ b. If sample appears 'original', assign a unique accession number.

More things to take into account are:

- “Contributors” are in small grey text
- If a second subtitle is needed please use textbiggreybold
- Legends or captions of pictures are in textcaption
- Italic is reserved for Latin names
- Bold can be used to put focus on one or more words but use it sparsely and wisely
- Underline should not be used as it is reserved for links

5. How to copy and paste from a Word document?

Have the Word document open in one window and the webpage you want to add the text to in another window. Select the text out of the Word document and click copy. Use the “Paste as plain text” button to paste the text on the webpage. Once the text is in the webpage, styles like title, text, captions can be applied. (see next item). It is very important to paste as plain text to prevent copying the formatting from the word document.



The screenshot shows a web application interface with a blue header containing navigation tabs: Home, Crops, Procedures, Other information, and Learning space. Below the header, there is a breadcrumb trail: Procedures > Procedures. The main content area is titled "Procedures / Edit Content [Info]". It includes a "Title:" field with the text "Procedures" and three icons: a floppy disk, a blue checkmark, and a red X. Below this is a "Category:" dropdown menu set to "Acquisition/Registration". The "Intro Text (Required):" section contains a rich text editor. A red circle highlights the "Paste as plain text" button in the editor's toolbar. The editor's content area displays the text "What is a genebank?" followed by two paragraphs of text about plant genetic resources and genebanks.

6. Creating a table

A table can be created by clicking on the insert table button.

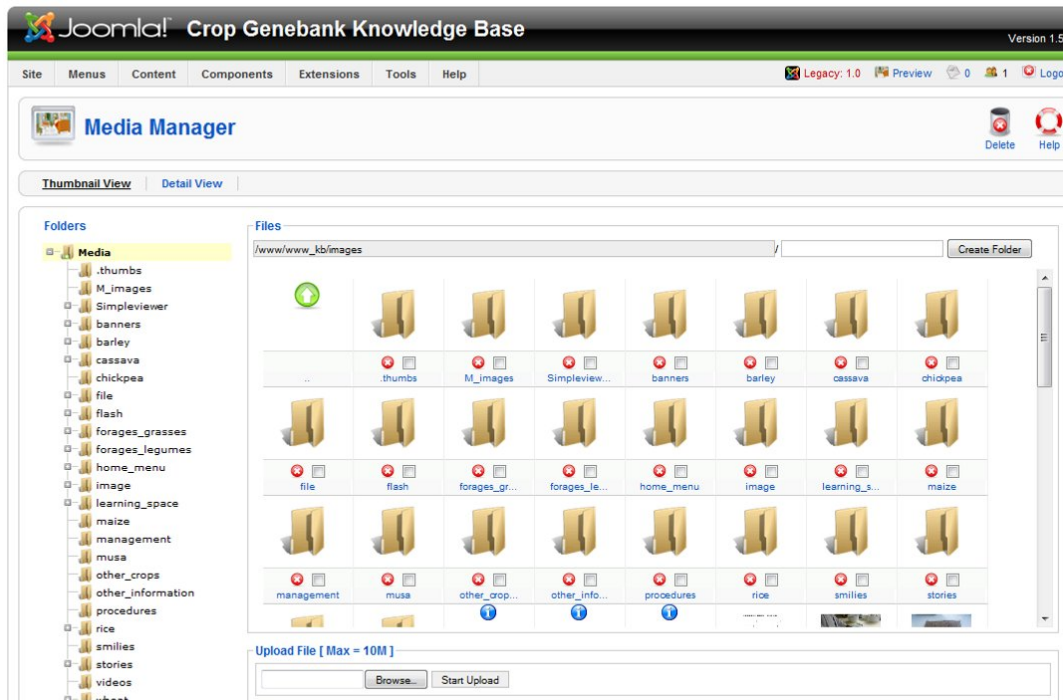
The screenshot shows the Joomla! Administrator interface. The main content area displays the 'Content Item: Edit' page for 'Regeneration of small-grained cereals'. A red arrow points to the 'Insert/Edit Table' button in the WYSIWYG editor toolbar. The right sidebar shows the 'Publishing Info' section, which includes fields for 'Show on Front Page', 'Published', 'Access Level' (set to Public), 'Author Alias', 'Change Creator' (Geert Claessens), 'Ordering', 'Override Created Date', 'Start Publishing', and 'Finish Publishing'. Below this, it shows 'Content ID: 245', 'State: Published', 'Hits: 117', and 'Revised: 14 times'.

Then set the properties of the table. The maximum width of tables should be no more than 750px.

The screenshot shows the 'Insert/Modify table' dialog box in Joomla!. The 'General' tab is active, and the 'General properties' section is visible. The 'Cols' field is set to 2 and the 'Rows' field is set to 2. Other fields include 'Cellpadding', 'Cellspacing', 'Alignment' (set to -- Not set --), 'Width', 'Height', 'Border' (set to 0), and 'Table caption' (with a checkbox). The 'Insert' and 'Cancel' buttons are at the bottom of the dialog.

7. Pictures

All pictures should be uploaded into the right folders through the media manager. (Home>Media manager) A folder is created to store images for every crop and section. Make sure you are in the right folder before you upload a picture and try to upload it already compressed and in the right size (= 300pixels in width).



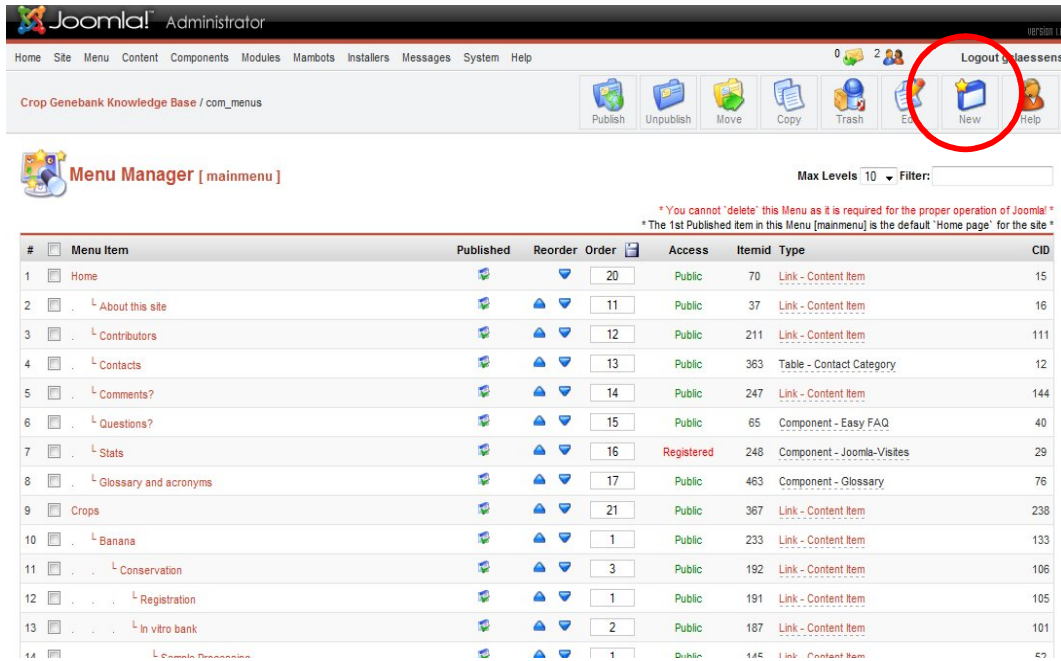
After the picture is uploaded you can add it to any page by clicking on the “Insert image”, then “browse server” where you can browse to the right folder to select the right image.



Note: To save time, first upload all the pictures you need in the right image folder. Then place them in the right pages.

8. Menu items

A menu item can be created by adding a **new menu** item in the menu manager. (Click on menu> mainmenu)

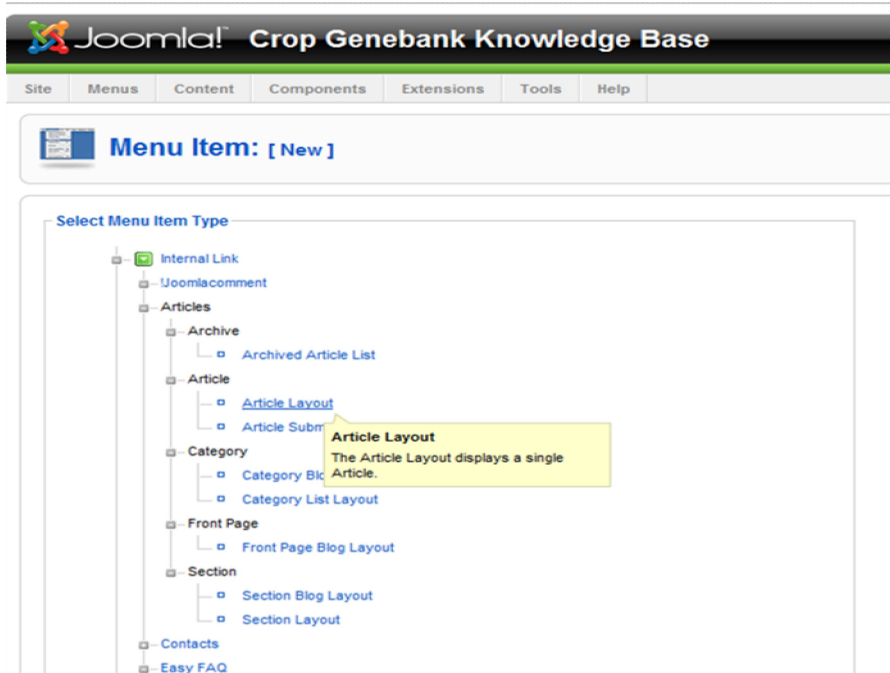


The screenshot shows the Joomla! Administrator interface for the 'Crop Genebank Knowledge Base / com_menus' component. The 'Menu Manager [mainmenu]' is displayed, showing a list of menu items. The 'New' button in the top right corner is circled in red. Below the list, there are two warning messages: '* You cannot 'delete' this Menu as it is required for the proper operation of Joomla! *' and '* The 1st Published item in this Menu [mainmenu] is the default 'Home page' for the site *'.

#	Menu Item	Published	Reorder	Order	Access	Itemid	Type	CID
1	Home			20	Public	70	Link - Content Item	15
2	About this site			11	Public	37	Link - Content Item	16
3	Contributors			12	Public	211	Link - Content Item	111
4	Contacts			13	Public	363	Table - Contact Category	12
5	Comments?			14	Public	247	Link - Content Item	144
6	Questions?			15	Public	65	Component - Easy FAQ	40
7	Stats			16	Registered	248	Component - Joomla-Visites	29
8	Glossary and acronyms			17	Public	463	Component - Glossary	76
9	Crops			21	Public	367	Link - Content Item	238
10	Banana			1	Public	233	Link - Content Item	133
11	Conservation			3	Public	192	Link - Content Item	106
12	Registration			1	Public	191	Link - Content Item	105
13	In vitro bank			2	Public	187	Link - Content Item	101
14	Sample Processing			1	Public	145	Link - Content Item	59

Select either “Article>Article layout” in the internal links if you want to link to a created page (then select its appropriate parent menu) or select a link to an external URL. You may want to select “target” to a new window for the latter.

STEP 1



The screenshot shows the Joomla! Administrator interface for the 'Crop Genebank Knowledge Base' component. The 'Menu Item: [New]' form is displayed, showing the 'Select Menu Item Type' dropdown menu. The 'Internal Link' option is selected, and the 'Article Layout' option is highlighted in yellow. A tooltip for 'Article Layout' is visible, stating: 'The Article Layout displays a single Article.'

STEP 2

1. First type the name of the menu item.

2. Then browse for that page that you would like to open when visitors click on that menu item. Look at the section name and category name to find the right page.

3. Select the location of the menu item. Scroll and click on the "parent" where you want the new item to be. New items will be placed at the last spot. Moving the item up or do the list can be done in the menu (see next picture).

4. Unless you created a link to an external website you should leave this as it is. Select the second choice (new window with navigation) if you link to another website. Check what you selected then click the SAVE button to finish.

To move a menu item up or down the list the arrows can be used.

Menu Manager [mainmenu]

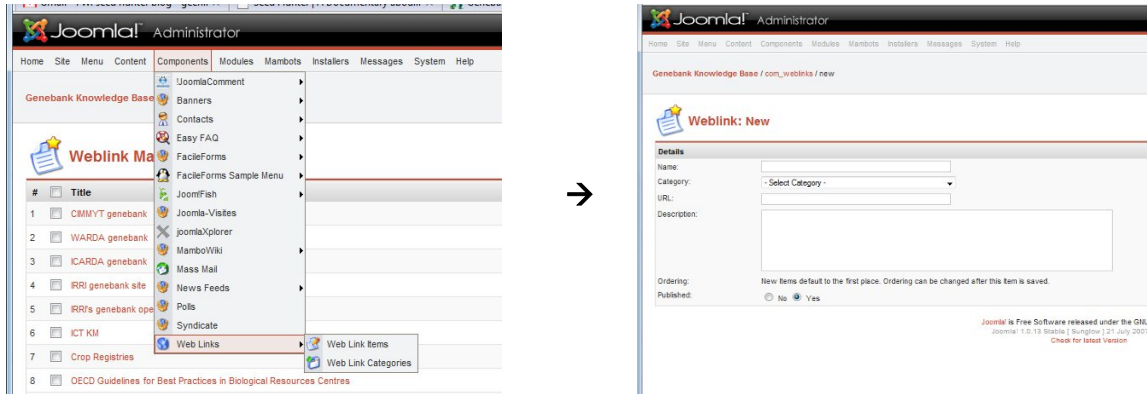
Max Levels 10 Filter:

* You cannot 'delete' this Menu as it is required for the proper operation of Joomla!
 * The 1st Published item in this Menu [mainmenu] is the default 'Home page' for the site *

#	Menu Item	Published	Reorder	Order	Access	Itemid	Type	CID
1	Home	<input checked="" type="checkbox"/>		20	Public	70	Link - Content Item	15
2	About this site	<input checked="" type="checkbox"/>		11	Public	37	Link - Content Item	16
3	Contributors	<input checked="" type="checkbox"/>		12	Public	211	Link - Content Item	111
4	Contacts	<input checked="" type="checkbox"/>		3	Public	363	Table - Contact Category	12
5	Comments?	<input checked="" type="checkbox"/>		4	Public	247	Link - Content Item	144
6	Questions?	<input checked="" type="checkbox"/>		1	Public	65	Component - Easy FAQ	40
7	Stats	<input checked="" type="checkbox"/>		1	Registered	248	Component - Joomla-Visites	29
8	Glossary and acronyms	<input checked="" type="checkbox"/>		1	Public	463	Component - Glossary	76
9	Crops	<input checked="" type="checkbox"/>		2	Public	367	Link - Content Item	238
10	Banana	<input checked="" type="checkbox"/>		2	Public	233	Link - Content Item	133
11	Conservation	<input checked="" type="checkbox"/>		3	Public	192	Link - Content Item	106
12	Registration	<input checked="" type="checkbox"/>		1	Public	191	Link - Content Item	105
13	In vitro bank	<input checked="" type="checkbox"/>		2	Public	187	Link - Content Item	101
14	Sample Processing	<input checked="" type="checkbox"/>		1	Public	145	Link - Content Item	59

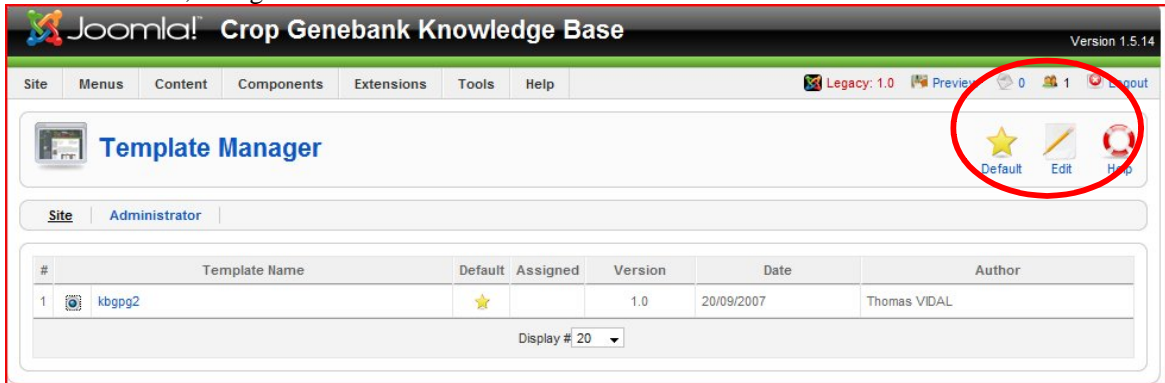
9. Adding a link in the useful links of the “Learning space”

Adding links and managing the categories of links is done in Components > Weblinks. Add the title, the URL, even a description and don't forget to select the target, usually a new window with browser navigation.



10. Changing the template (design)

KNOWLEDGE OF HTML, PHP AND CSS IS REQUIRED in order to change the template. The template can be found at Extensions>Template manager. Changes to the page structure are made in the html code, changes to fonts and text color in the css code.



Note: This should be done with utmost care! Changes are irreversible so a backup copy should be saved of the original html and css!

11. Adding a user

To add a user go to site > usermanager. You can see the different registered user with their respective access levels. There are seven User Groups/levels within Joomla. Four only have access to the Site Front-end: Registered, Author, Editor, and Publisher.

Front-end Users get additional rights over guests, which may include the ability to create and publish content on the web site. We will generally refer to these users as content providers since their primary goal is to provide content on the web site, not to administer the site or alter its design.

Content providers may provide new content through the web interface using an embedded WYSIWG (What You See Is What You Get) editor without any knowledge of HTML coding. Within the Front-end User classification there are four specific levels, the site administrator can assign. These levels are: Registered, Author, Editor, and Publisher.

Front-end Registered Users

Registered

A Registered User has no ability to create, edit, or publish content on a Joomla! web site. They may submit new Web Links for publication and they may have access to restricted content that is not available to guests.

Author

Authors can create their own content, specify certain aspects of how the content will be displayed, and specify the date when the material should be published.

Editor

Editors have the same abilities as an Author and they can edit their own content as well as that of any other Author.

Publisher

Publishers can perform all the duties of Authors and Editors and have the ability to publish

Back end Users

Back-end users -- Managers, Administrators, and Super Administrators -- are typically thought of as the site administrators, but they also have access to the Front-end interface. Just as with the Front-end Users, Back-end Users may have different privileges.

Table 5: Back-end Registered Users

Manager

A Manager has the same permissions as a Publisher but with access to the Backend Administrator's panel. Managers have access to all the content associated controls in the administrator panel but are not able to change templates, alter page layouts, or add or delete extensions to Joomla!

Managers also have no authority to add users or alter existing user profiles

Administrator

Administrators have a broader range of access than Managers do. Administrators can add and delete extensions to the web site, change templates or alter page layouts and can even alter user profiles equal to their own permission levels or below. What they cannot do is edit the profiles of a Super Administrator or change certain global characteristics of the web site. Super Administrators do not show up in the User Manager screen when users are logged in as an Administrator.

Super Administrator

The Super Administrator has the same kind of power as root in a traditional Linux system and has unrestricted abilities to perform all administrative functions inside of Joomla! Only Super Administrators have the ability to create new users with Super Administrator permissions or to assign Super Administrator permissions to existing users. The only user that exists after a Joomla! installation is the Super Administrator. This is the 'admin' account created during the installation process.

There are also three levels with access to the Administrator Back-end: Manager, Administrator, and Super Administrator. Choosing the correct group to assign your user to may be crucial for your site's security so pay attention when setting this up! There is no golden-rule for choosing the user group except maybe for this one: "Keep the rights as low as possible". Normally, you wouldn't want to assign the Super Administrator or even Administrator role to just anyone. The Manager role is somewhat weaker but still strong enough to compromise your site's content. In 99% of the cases you will assign your users to the "Author" or "Publisher" group, thus only allowing them front-end access.

The screenshot shows the Joomla! User Manager interface. At the top, it says "Joomla! Crop Genebank Knowledge Base" and "Version 1.5.14". Below the navigation menu, there are icons for Logout, Delete, Edit, New, and Help. The main area contains a table of users with columns for #, Name, Username, Logged In, Enabled, Group, E-Mail, Last Visit, and ID. The table lists 9 users, including Alexandra Jorge, Ehsan Dulloo, Elizabeth Goldberg, Geert Claessens, Ines Van den houwe, Jean Hanson, Selam Alemayehu, Thomas Vidal, and Visitor. A filter box and "Go" and "Reset" buttons are at the top left of the table. At the bottom right of the table, there is a "Display # 20" dropdown.

#	Name	Username	Logged In	Enabled	Group	E-Mail	Last Visit	ID
1	Alexandra Jorge	ajorge		✓	Administrator	a.jorge@cgiar.org	2009-08-27 13:29:33	66
2	Ehsan Dulloo	edulloo		✓	Author	e.dulloo@cgiar.org	2008-01-18 08:15:12	69
3	Elizabeth Goldberg	egoldberg		✓	Author	e.goldberg@cgiar.org	2008-01-17 17:30:06	70
4	Geert Claessens	gclaessens	✓	✓	Super Administrator	geert.jef.claessens@gmail.com	2009-09-03 13:23:17	63
5	Ines Van den houwe	ivandenhouwe		✓	Publisher	ivandenhouwe@cgiar.org	2007-10-19 13:44:59	67
6	Jean Hanson	JHanson		✓	Manager	j.hanson@cgiar.org	Never	72
7	Selam Alemayehu	selam		✓	Administrator	s.alemayehu@cgiar.org	2009-07-06 14:07:45	73
8	Thomas Vidal	tvidal		✓	Super Administrator	t.vidal@cggmail.org	2009-08-31 08:32:35	75
9	Visitor	Visitor		✓	Registered	ingegeert@gmail.com	2009-08-19 11:58:26	68

To have access to the administrative site of the website a minimum of "manager" needs to be set. Once all user details are filled out and a group is selected, an editor needs to be selected. Select the 'JCE154'.

The screenshot shows the Joomla! User Edit interface for user Ehsan Dulloo. The "User Details" section includes fields for Name, Username, E-mail, New Password, Verify Password, Group (set to Author), Block User, and Receive System E-mails. The "Parameters" section includes Front-end Language, User Editor (set to Editor - JCE 154), Help Site, and Time Zone. The "Contact Information" section includes Name, Position, Telephone, Fax, and Miscellaneous Information. A red arrow points to the "User Editor" dropdown menu, and a text box says "Don't forget to select the editor." The "Group" dropdown menu is also visible, showing options like Public Front-end, Registered, Author, Editor, Publisher, Public Back-end, Manager, Administrator, and Super Administrator.