

Friendly House Web Site Training  
An Interactive Qualifying Project Report:  
submitted to the faculty of the  
WORCESTER POLYTECHNIC INSTITUTE  
in partial fulfillment of the requirements for the  
Degree of Bachelor of Science

by:

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Date: March 17, 2009

Approved:

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## **Background**

The Friendly House Mission Statement is grounded in the Settlement House Philosophy of approaching individuals, families, and the community in a holistic manner. Friendly House has recommitted itself to the Settlement House Philosophy of corporate commitment to its community, revisiting a deep-rooted concept in order to move the organization to a new level.

To fulfill its mission, Friendly House offers after school programs, art and recreation programs, summer camping programs, senior services, basic needs services, a continuum of shelter services, community organizing efforts, and a host of information and referral services.

## **Abstract**

This project is a complement to another IQP for Friendly House in progress at the same time. It focuses on the users of the system developed for this IQP, and training them to fully use it. The original goal of the project was to update Friendly House's e-mail system, however this was handled by someone else after the project started, forcing a goal change.

## **Motivation**

Friendly House does not have the resources to build and maintain a Web site from scratch, but still desires to have a Web site to reach as many potential beneficiaries and potential donators as possible. To solve this problem, a Content Management System (CMS) was created that would allow Web pages to be easily modified and created by the Friendly House staff, without requiring them to pay expensive Web developers. Any system is useless if there is no one that knows how to use it, so it was necessary to write user documentation that would ensure that the Friendly House staff was able to fully use the system.

## Original Problem

The original problem that this IQP intended to solve was the lack of e-mail addresses on a Friendly House domain. Another IQP had a goal of giving Friendly House their own domain name, which would be used for the e-mail. At the time, their Web page was hosted on worcesterresources.com and their staff had e-mail accounts from a variety of domains, e.g. Jane@verizon.net and John@charter.net. After speaking with the people at Friendly House to gather the requirements for the e-mail system, I had decided to use Google Mail (GMail), as it met all of their requirements and is free for non-profit organizations. It was then necessary to prove ownership of the domain to Google and to switch the Friendly House's staff's current e-mail addresses to new GMail addresses. Both steps required contacting the owner of the domain and manager of the existing e-mail accounts, Kevin Nylan. After my request for help in transferring the e-mail addresses to GMail, Kevin instead transferred the existing e-mail accounts to use the new domain, opting against using Google as the service provider.

Kevin Nylan's insistence upon doing the work for setting up their e-mail meant that I could not complete this IQP, as I cannot take credit for the work of another. It was therefore necessary to find additional work to do for Friendly House to complete my IQP.

## **New Problem**

Paul Gibler, another student working on a Friendly House IQP, had created a CMS for Friendly House, so that the staff could easily create and maintain Web pages without requiring external Web developers or knowledge of HTML, PHP, Javascript, and CSS. To help that IQP, I was given the tasks of gathering feedback on early versions of the site, preparing user documentation for the CMS, training a portion of the staff to use the CMS, and finding bugs/usability issues within the CMS. I only had to go to Friendly House once to gather feedback. I showed them an early draft of what the Web page would look like, how Web pages would be managed, and the FCKeditor, an open source HTML editor designed to resemble a document editor such as Microsoft Word. Everything was well received, so there was no need to make a second trip. I was not able to do my other tasks until after Paul finished working on the Web site and CMS, which was subject to a few delays, such as discovering that the Web host did not fully support PHP, after the CMS and Web site were finished.

# Methodology

## Documentation

After the Web page was finished, I began work on the user documentation. Because the staff of Friendly House are not very familiar with computers, especially Web based applications, I did my best to make the documentation as concise and complete as possible. The documentation is task-based and fully details how to perform every action possible with the CMS; note that because it is a CMS, there are not very many actions possible. There is no way to creatively use the CMS to do something unexpected, so making the documentation cover every possible action was not difficult. The documentation only goes in full detail for the CMS itself, not for the FCKeditor. While the staff of Friendly House may be unaccustomed to dealing with Web pages, they do frequently use Microsoft Word. Due to the intended similarity between the FCKeditor and Microsoft Word, I felt that it was not necessary to go into detail on using the FCKeditor, but instead gave a brief overview of the toolbar, comparing the majority of its functions to Microsoft Word when possible and only went into depth on the tools that have no clear equivalent in Microsoft Word, e.g. the image uploader. Some of the tools, e.g. the Div tool for using CSS, were not mentioned at all in the documentation, as I reasoned that they were intended for advanced Web development and would not be of any use to the Friendly House staff. At the recommendation of Professor Pollice, the final page of the documentation is a list of the tasks that can be performed in the CMS with brief instructions for performing the tasks, with the intent that a user who has read the documentation and knows how to perform a task but cannot think of the starting point could use the final page as a “cheat sheet” to let them know the basics of what to do.

## **Bug Finding**

Bug finding coincided with documentation writing. It was necessary to learn how to use the CMS myself by using it, and during this time I was also looking for bugs. I found a few minor bugs, as well as a major bug; images uploaded using the FCKeditor were not put into the directory that the FCKeditor searches for existing image files in, making uploaded images unavailable. The minor bugs I found would only appear upon misuse of the system. For example, in the tool used to change the order categories appear on the Web site, it was possible to move a category left or right without selecting a category first, resulting in a “phantom” category replacing existing ones. This would never occur from proper use of the site, and did nothing harmful, only causing a graphical error on the page until it was refreshed. All of the bugs I found were submitted to the Sourceforge project page along with a possible cause if I could think of one, and were fixed by Paul.

## **Training**

My final task for the IQP was to go down to Friendly House, give them the user documentation, and teach them to use the CMS. Paul and I went together, as he had to get usernames and passwords from them so he could create their accounts. The training was kept brief due to the existence of the documentation. We showed them the CMS in action, gave a highlight of the features and what they would be used for, and had them sit down and use it themselves. The reception was mostly positive, the only complaint was on the color scheme Paul had chosen for the CMS.



# Conclusions

## Results

The primary result of this project is the creation of the user documentation and the user training. I also contributed to the CMS by gathering feedback and finding bugs. I only went to gather feedback once; the Web site was well received, so it was considered unnecessary to make a second trip. The trip did not yield any criticism, so no changes to the design were made. Bug finding was more fruitful, as I was able to find a few bugs, one of which would have caused problems for the users.

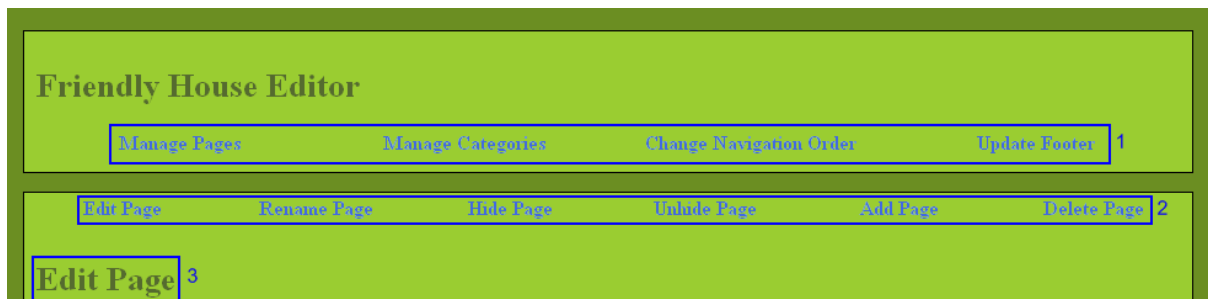
## Future Work

Future work for this project would focus on the CMS itself, not the user documentation. While the user documentation does not cover every aspect of the FCKeditor, I believe that it sufficiently covers every feature that they will use. Many features have a direct equivalent in Microsoft Word, a program that the staff has experience using. Thus it is not necessary to go into any depth in explaining the use of bold or italics. There are also many features that are almost of no use to the staff, as they are intended for more advanced Web page development than the Friendly House staff are capable of. The user documentation for the current version of the CMS can therefore be considered complete. Any additional features to the CMS would need to be documented.

## Appendix A - Documentation

### Overview

The tools for the Friendly House 2 editor are divided into 4 main groups. The categories contain a number of related tools; e.g. the “Manage Pages” group contains the tools “Edit Page”, “Hide Page”, “Unhide Page”, “Add Page”, and “Delete Page”, all the available tools for working with individual pages. Clicking on a group will load the list of tools within that group. Clicking on any of the tools will load that page, allowing you to use the tool and giving a brief set of instructions.



1. The list of groups.
2. The tools in the currently selected group (Manage Pages)
3. The currently selected tool

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## Logging in and logging out

Before you can use the Friendly House editor, it is necessary to login to prove that you're part of the Friendly House staff. When you access the editor page, you will be asked for a username and password. You should have gotten a username and password from the administrator; if you have not gotten a username and password you will need to talk to the administrator before you can continue. Make sure to remember your password and keep it safe. Do not give out your password to any other people.



To login, type in your username and password into the appropriate fields. In this picture the example username “friendly” is logging in with the password “password”. The password is replaced with \*s so that other people cannot see what you are typing in. After entering the password, press the Login button. If you entered the password incorrectly, you will get an error. If this happens, try again in case you mistyped something. If you still cannot login, ask the administrator for assistance.

If the password was entered correctly, you will go to the main page of the editor. From here you can modify and create webpages on the Friendly House website. Once you are finished, it is important to logout so that no one else can use your account to change the website. There is a “Logout” link at the top-right of every page. When you are finished, press that button to logout. You will return to the login page.

## Creating a new page

Select the Manage Pages group and the Add Page tool. At the bottom of the page is the list of Categories for the website. A new page must belong to one of the categories. Click the category you want to add a new page to. To create a new category, see “Creating a new category”.



You will then be asked to name the new page. The name should be short and descriptive. Read the note on name conversions on the page. You cannot have two pages within the same category that have the same name after this conversion occurs. It is possible to have two pages with the same name in *different* categories, but this is not advisable to avoid confusing the two pages. Once the name is entered, press the ‘Add New Page’ button to create the page. A message window will open saying that the page was created successfully, or that there was an error and the page was not created.

Assuming the page was created, it can now be found on the website as part of the category you chose.



The new page is generated with very little content. To modify the contents of the new page, see “Updating a page”.

## Removing a page

There are two ways to remove a page; deleting the page and hiding the page. Hiding the page makes it so that it cannot be accessed from the website, but can still be viewed and modified from the editor. The page can also be unhidden at a later date. Deleting a page **permanently** removes it from the website. There is no feature to recover a deleted page; the only way to get a deleted page restored is to recreate it. Therefore, do not delete a page unless you are **absolutely positive** that it will never be needed again.

It is not possible to delete or hide the main page of a category. To remove this page, it is necessary to delete or hide the entire category. Note that this will affect any other pages in the category as well. See “Removing a category” for more information.

To hide a page, select the Manage Pages group and the Hide Page tool. There is a list of categories at the bottom of the page. Click it to load a list of unhidden pages. If there are no visible pages besides the main page, you will get a popup saying this and nothing will happen. Otherwise a popup will say that all pages have been loaded successfully. Each visible page is represented by a button. Clicking it will make the page hidden.

To delete a page, select the Manage Pages group and the Delete Page tool. There is a list of categories at the bottom of the page. Click it to load a list of unhidden pages. If there are no visible pages besides the main page, you will get a popup saying this and nothing will happen. Otherwise a popup will say that all pages have been loaded successfully. Each visible page is represented by a button. Clicking on a page will bring up a popup asking you to confirm your choice. Click OK to delete the page.

## Unhiding a page

To unhide a previously hidden page, select the Manage Pages group and the Unhide Page tool. There is a list of categories at the bottom of the screen. Click on a category to bring up the list of hidden pages within the category. If there are no hidden pages you will get a popup saying so, and there will be no changes.

## Updating a page

The Friendly House editor is designed to make editing web pages simple. Adding text should be trivial, due to the similarity to Word. See the **Using the FCKeditor** section for an overview of using the editor.

To modify the contents of a page, select the Manage Pages group and the Edit Page tool. There is a list of

categories at the bottom of the page. Clicking on a category will create up to three columns of page names. The home page is always present and is on the left. Any pages will appear in the middle column. Hidden pages will appear in the right column. Clicking on a page name will open the editor for that page.

## Creating a new category

Select the Manage Categories group and the Add Category tool. At the bottom of the page, you will be asked to type in a Folder name and a Label name. The folder name for the category must be unique (i.e. no two categories may have the same folder name). The label name is what will appear on the website, and therefore should be descriptive. Press the “Add New Category” button once you have filled both fields in. A popup will open saying that the category was created successfully, or that there was an error.

Creating a new category creates a “Main” page. This page is viewed from the website by clicking on the category name. It will have the same name as the category’s label. It is identical to a newly created page from the Add Page tool, and should be edited to give it meaningful content. See Updating a page. If necessary, you should also add any subpages that belong in the category. See Adding a Page.

## Removing a category

There are two ways to remove a category; deleting the category and hiding the category. Hiding the category makes it so that the category and all of its subpages will not show up on the website. The category can then be unhidden at a later date. Deleting a category **permanently** removes it from the website and also deletes every subpage in the category. There is no feature to recover a deleted category or page; the only way to get the deleted pages back restored is to recreate them. Therefore, do not delete a category unless you are **absolutely positive** that there are no pages within the category that shouldn’t be deleted.

To hide a category, select the Manage Categories group and the Hide Category tool. There is a list of unhidden categories at the bottom of the page. Click on a category to hide it. If there was no error, you will get a popup saying that the page was hidden successfully, and it will be removed from the list of categories.

To delete a category, select the Manage Categories group and the Delete Category tool. There is a list of categories at the bottom of the page. Clicking on a category will bring up a popup asking you to confirm your choice. Click OK to delete the category.

## Unhiding a category

To unhide a previously hidden category, select the Manage Pages group and the Unhide Category tool. There is a list of hidden categories at the bottom of the screen. If there are no hidden categories, then there will be no buttons at the bottom of the screen. Clicking on a category will give a popup saying that it was unhidden successfully, or that there was an error.

## Changing the order of the categories on the menu

To change the order the categories appear in, select the Change Navigation Order group and the Edit Category Navigation Order tool. A list of categories will appear at the bottom of the page, accompanied by radio buttons. The categories are in the same order as they appear on the website. Click the button for the category you want to move. Only one button can be selected at once; selecting another button will unselect the first. Press the “< Move Left” or “Move Right >” button to move the selected category to the left or right. A popup will open saying that the change was successful, or that there was an error. You can only move a category one

space at a time, but the category will remain selected after moving it, so you can immediately move it again.

### **Changing the order of pages within a category**

To change the order pages appear within a category, select the Change Navigation Order group and the Edit Category Page Navigation Order tool. A list of categories will appear at the bottom of the page. Click one to bring up a list of pages within the category accompanied by radio buttons. The pages are in the same order as they appear on the website. Click the button for the page you want to move. Only one button can be selected at once; selecting another button will unselect the first. Press the “Move Up” or “Move Down” button to move the selected page up or down. A popup will open saying that the change was successful, or that there was an error. You can only move a page one space at a time, but the page will remain selected after moving it, so you can immediately move it again.

### **Changing the name of a page**

To change the name that appears on the website for a page, select the Manage Pages group and the Rename Page tool. At the bottom of the screen there will be a list of categories. Click on the desired category to load the list of subpages. The subpages will be displayed in three columns; the Main Page, Visible Pages, and Hidden Pages. Click on the page you want to rename. A textbox will appear below the page list asking for a new name. Enter the new name and press the Save Page Title button. You will then get a popup saying the name was changed successfully, or that there was an error.

### **Changing the name of a category**

To change the name that appears on the website for a category, select the Manage Categories group and the Rename Category tool. At the bottom of the screen there will be a list of categories. Click on the category you wish to rename. A textbox will appear below the category list asking for a new name. Enter the new name and press the Set Category Label button. You will then get a popup saying the name was changed successfully, or that there was an error. Note that there is no way to change the folder name, but the folder name is of little importance.

### **Changing the copyright information, contact information, or operating hours**

The copyright information, contact information, and operating hours are shown at the bottom of every page. To change them, select the Update Footer group. The copyright information, contact information, and operating hours are in text boxes on this page. To change them, update the information in the textbox and press the Submit Updates button when finished.

### **Using the FCKeditor**

The FCKeditor is the document editor used for modifying web pages on the Friendly House website. Its interface is very similar to the interface used in Microsoft Word or any other regular editor. Most of the features, such as bold, headings, font size, etc, work almost exactly as they do in Microsoft Word. Therefore, this section will not fully explain the features of the FCKeditor. This section will only go into depth for tools that are expected to be used frequently and have no clear equivalent in Microsoft Word.



**HTML Source:** Shows the HTML source code for the page being viewed. Pressing the button again will revert to the standard display. This can be used to edit the pages in HTML if desired.

**Save:** Saves changes. If the window is closed without pressing this button first, the webpage will not change.

**New Page:** Creates a new, blank page. Not to be confused with **Add New Page**.

**Preview:** Opens a new window that shows how the webpage will be displayed to users, but without the Friendly House logo or menus. Unsaved changes will be displayed here.

**Templates:** Brings up a list of available templates. Using a template will create formatting for you.

**Cut:** Removes the selected text and puts it on the clipboard. Note that security settings may prevent this from working

**Copy:** Puts the selected text on the clipboard

**Paste:** Puts the current clipboard text onto the screen at the cursor. Browser security settings may add an additional step.

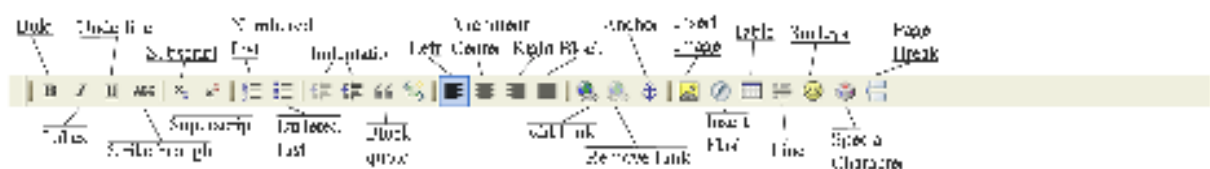
**Paste as Plain Text:** Brings up a window to paste text into. Text put into this window will have all the formatting, such as bold and lists, removed.

**Paste from Word:** Brings up a window to paste text into. You can paste text from Word into this window and the formatting will be converted to make it work in the webpage.

**Print:** Prints the current webpage

**Select All:** Selects all of the text on the page

**Remove Formatting:** Removes the formatting for the selected text, leaving only plain text. It does not, however, remove links; it is necessary to use the Remove Link tool to delete a link.



**Numbered List:** Starts a numbered list. Type the text for the first entry, then press return to go down to the next entry. The list will end after pressing the button again or after pressing return on an empty line. If some text is selected when the button is pressed, the text will be converted into a list.

**Bulleted List:** Starts a bulleted list. Type the text for the first entry, then press return to go down to the next entry. The list will end after pressing the button again or after pressing return on an empty line. If some text is selected when the button is pressed, the text will be converted into a list.

**Increase/Decrease Indentation:** Shifts the text one tab to the left or right. Applies to the entire line(s), not just any selected text.

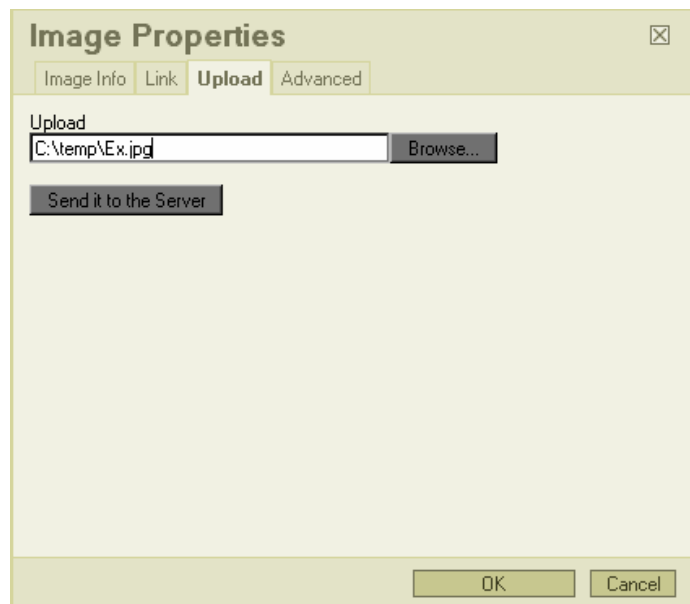
**Alignment:** Changes the alignment. Applies to the entire line(s), not just any selected text.

**Add Link:** Brings up a window used to create or modify a link to another website or to an anchor on the current page. Change “link type” to the appropriate type; “URL” for a link to another webpage, “E-Mail” for an email address, and “Link to anchor in the text” to create a link that moves the user to a different position on the same page. For URL, do not change protocol unless you know what the other protocols do; always use “http://” for webpages. For E-Mail, each field you enter will automatically be filled in when someone clicks the link. Only E-Mail Address is mandatory. For links within the same page it is necessary to first create anchors in the page.

**Remove Link:** If the cursor is on a link or the link is selected, the link is removed and replaced with the text of the link. This is grayed out if more text than just the link is selected; thus you cannot use it to remove multiple links at once.

**Anchor:** Creates an anchor on the page. Anchors are not visible but instead are used to create links within a page. To create a link to a specific part of a page you must first create an anchor at that location. Note that it is possible to link to an anchor at another page by appending “#<Anchor Name>” to the end of the URL. Upon clicking the link the user will go to the new page and move to the anchor.

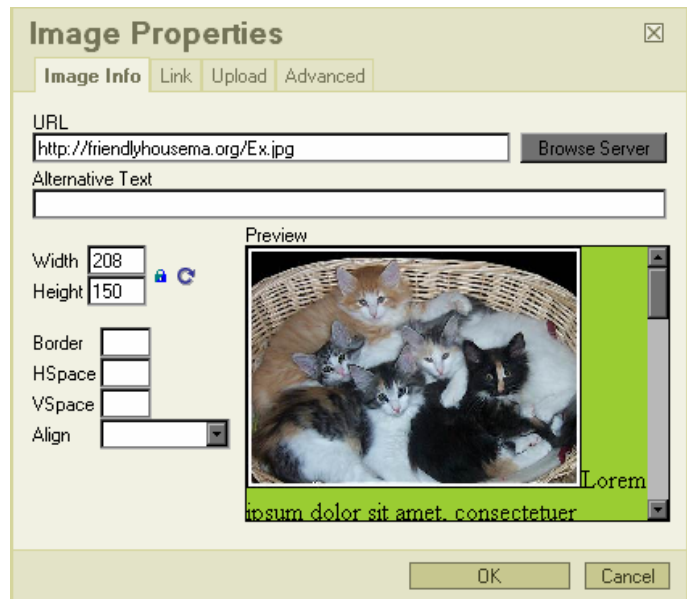
**Insert Image:** Brings up a window used to place an image on the page. The window can be used to easily upload images from your computer to the webserver and to get a list of already uploaded images so they can be reused. To upload an image, use the “Upload” tab. Type in the filepath, or use Browse to find the file using Windows Explorer. Press “Send it to the Server” to upload the file. You will get a popup when it finishes, or an error. This will automatically take you back to the “Image Info” tab with the uploaded picture filled in to the URL field. To use the uploaded image at a later time, click the “Browse Server” button to get a list of images that have been uploaded to the server, or fill in the URL field yourself. It is possible, but not advisable, to put in any image from the internet into the URL field; however this is considered impolite and many websites will prevent the





correct image from displaying. It is best to stick to only using images uploaded to the Friendly House webserver.

The Image Info tab will show a preview of the image that will be displayed. Alternative Text should also be filled in, but is not required. This is the text that will be shown if the image doesn't load for some reason. There are a number of other options for the picture that can be changed. Image Width and Height can be changed to shrink or enlarge the picture. If the image is "locked" then changing one will also change the other to preserve the original dimensions. If the image is unlocked then changing only one will result in a stretched image. You can quickly reload the original image dimensions by pressing the Reload button. "Border" will create a border around all four sides of the image of the given thickness. VSpace and HSpace will add a vertical and horizontal offset from the aligned edge. Alignment lets you choose how the image is placed relative to the screen edge and how text will wrap around the image. All of these changes will be shown in the preview as they are made.



The Link tab can be used to make an image act as a link. If the URL is filled in, then clicking on the image will take the user to that location.

Add Flash: Opens a window used to put flash on the page. A flash file must first be uploaded to the server using the Upload tab. Uploaded flashes can be searched for with the Browse Server button. The width and height of the flash can also be changed.

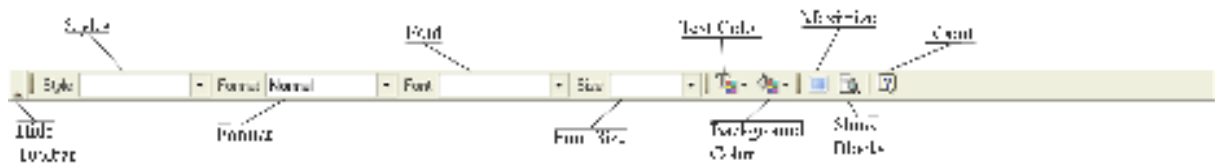
Table: Brings up a window used to create a table. Insert the number of rows, columns, total width and height, and other optional categories to create the table. Once the table is created it is then necessary to fill in the information manually.

Line: Creates a horizontal dividing line on the webpage.

Smiley: Gives you a list of emoticons that can be added to the webpage.

Special Character: Brings up a window containing a selection of characters, including many that cannot be easily typed by a standard QWERTY keyboard. This will likely be necessary to type many foreign words, e.g. señor.

Page Break: Inserts a page break. This has little effect on normal webpage viewing. When printing a copy of the page, it will work as expected and end the current page, putting all of the following text onto the next page.



Hide Toolbar: Clicking the arrow will hide the toolbar so that more of the webpage can be displayed at once. Doing this will all of the tools on the toolbar, leaving only a narrow strip containing the arrow to unhide the toolbar.

Maximize: Causes the editor to use as much space on the active window as it can.

About: Shows additional information about the FCKeditor, including the home page.

## Summarized instructions

### **Creating a new page**

Select “Manage Pages” and “Add Page”  
Click on the appropriate category  
Type the page's name and press “Add New Page”

### **Updating a page**

Select “Manage Pages” and “Edit Page”  
Click on the appropriate category and then the page to update  
Modify the page in the editor. Press the Save button to finish and close the window.

### **Removing a page**

Do one of “Hiding a page” or “Deleting a page” below

### **Hiding a page**

Select “Manage Pages” and “Hide Page”  
Click on the appropriate category and then the page hide

### **Deleting a page**

Select “Manage Pages” and “Delete Page”  
Click on the appropriate category and then the page to delete

### **Renaming a page**

Select “Manage Pages” and “Rename Page”  
Click on the appropriate category and then the page to rename  
Type in the new name and press “Save Page Title”

### **Unhiding a page**

Select “Manage Pages” and “Unhide Page”  
Click on the appropriate category and then the page to unhide

### **Creating a new category**

Select “Manage Categories” and “Add Category”  
Type in the folder name and label (display) name for the new category  
Press “Add New Category”

### **Removing a category**

Do one of “Hiding a category” or “Deleting a category” below

### **Hiding a category**

Select “Manage Categories” and “Hide Category”  
Click on the category to hide

### **Deleting a category**

Select “Manage Categories” and “Delete Category”  
Click on the category to delete

### **Renaming a category**

Select “Manage Categories” and “Rename Category”  
Click on the category to rename  
Type in the new name and press “Set Category Level”

### **Unhiding a category**

Select “Manage Categories” and “Unhide Category”  
Click on the category to unhide

### **Changing the order categories appear in**

Select “Change Navigation order” and “Edit Category Navigation Order”  
Click the radio button for the category to move.  
Use the “< Move Left” and “Move Right >” buttons to move the selected category

### **Changing the order pages appear within a category**

Select “Change Navigation order” and “Edit Category Page Navigation Order”  
Click on the appropriate category and click the radio button for the page to move  
Use the “Move Up” and “Move Down” buttons to move the selected page

### **Changing the copyright information**

### **Changing the contact information**

**Changing the posted operating hours**

Select “Update Footer”

Change any or all of the fields and press “Submit Updates”