

CMS Training Manual Partnership Advanced

Version 1.1

For the new EZ Content Management System built for the OneWorld Network

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INTRODUCTION TO THIS COURSE

This course is designed to explore some of the possibilities that exist within the new CMS to manage relationships and give you the some of the skills to configure you site to you local situation. It will cover three areas related to partnership

Contact management

Define a consultation

Understand how to add edit consultations

Implications of consultations on relationship management across the network

Partnership packages and services

Learn to add/edit a partnership package

Understand how to configure a new partnership package.

Creating new services for your center

Light and heavy partnership application

Gain a further awareness of the application procedure.

- Implications of choices on your centre.

Finally don't expect a finished product. The site still has lots of bugs, is slow, and needs configuration so you will need to be patient.

Contact management:

Consultations defined : Consultations are a simple but extremely powerful tool for contact management. They allow notes to be entered for an organisation or for an individual, stored with the contact details or organisational details, and emailed to a group of users. For those familiar with the existing CMS they replace and add functionality to the existing notes fields.

Consultations are located in the contact module of the ez systems administrative interface. They can be viewed when looking at the organisation details, or by themselves in the consultation list page. We will learn about the consultation function by taking a case study of how it might be used to track a relationship with a partner.

Example of a consultation

Edit consultation

Consultation with company Afronet

Consultation information

Short description:

Status:

Description:

I went and met with Ann. She was interested in how to work more closely with OneWorld in Radio.
I put her in contact with Jackie.

Group note:

Administrators
AidsChannel.org - English editors
Alternatives
Alternatives
Anonymous
Debtchannel - English editors
Latin American metal heads
LearningChannel - English editors
NAFRE
OneWorld Africa - English editors
OneWorld Canada - English editors
OneWorld Canada - French editors
OneWorld Latin America - Spanish editors

Email note:

OK

Cancel

Fields in the consultation screen

Short description	Use it like you would use the subject line in an email message
Description	Use it like you would use the body of an email message
Date	The date of the consultation.
Status(text to be changed to type)	These fields need to be discussed but suggested that it links to why it is of interest to OneWorld (funding, customer service) and not the type of consultation(ie face to face, telephone)

Group note(text to be changed to notify group)	Similar to the group function on Outlook express. Everyone who is part of this group will receive the note as an email, with the description as the subject and the description as the body of the mail. We will explore how these groups are created later.
Email note(notify individual)	Same as the group function but sent to an individual email

Consultations step by step:

In this exercise we will record a consultation done with an existing partner. The consultation was a meeting with Afranot regarding a joint project to build a special edition for Africa.

If you are not already logged into the ez administrative backend

<Go to <http://admin.ez.vaux.oneworld.net:7307>>

<Login as admin, publish>

<Go to <http://admin.ez.vaux.oneworld.net:7307/contact/company/edit/105/>>

This is the organisation detail for Afronet

<Scroll down to the bottom of the screen.>

You should see the following

Consultation date:	Description:	Status:
04.10.2002	this should be 4	phone conversation
16.09.2002	Changed status	
16.09.2002	Changed status	
16.09.2002	Changed status	

You will notice that there are already four consultations with Afronet. You will be adding a fifth.

<Click on “Add consultation”>

You will see the following screen

 contact

Edit consultation

Consultation with company Gemini News Service

Consultation information

Short description:

Status:

-- Choose Type --

Description:

4

October

2002

Group note:

Administrators
AidsChannel.org - English editors
Alternatives
Alternatives
Anonymous
Debtchannel - English editors
Latin American metal heads
LearningChannel - English editors
NAFRE
OneWorld Africa - English editors
OneWorld Canada - English editors
OneWorld Canada - French editors
OneWorld Latin America - Spanish editors

Email note:

OK

Cancel

Fill in each of the fields in the form

<Short description: Discussed special edition for Africa>
 <Description: This would be the details of the discussion, most likely action points.>
 <Status: Suggest to choose editorial >
 <Group note: OneWorld Africa- English editors>
 <Email note: Alex.lockwood@oneworld.net>
 <set the date>
 <click ok>

As a result you would have sent an email with the action points to all OneWorld Africa English editors, and Alex Lockwood, that you have meet with Afronet and discussed a special edition for Africa.

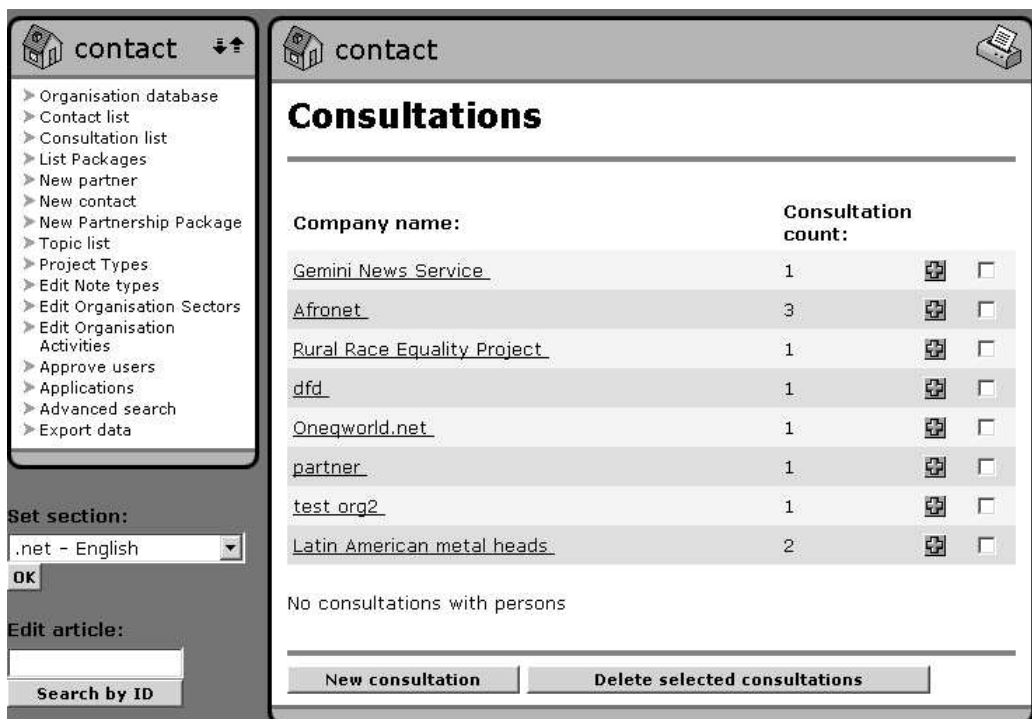
This note will be stored with organisation details.

You can also view all the latest consultations from the **consultation list** menu from the contact module.

Viewing the latest consultations



<click on consultation list>



<click on Afronet>

(note you can also add a new consultation by clicking the + symbol)


contact


Consultations with Afronet

<u>Date:</u>	<u>Description:</u>	<u>Status:</u>		
04.10.2002	<u>this should be 4</u>	<u>phone conversation</u>		☐
16.09.2002	<u>Changed status</u>			☐
16.09.2002	<u>Changed status</u>			☐
16.09.2002	<u>Changed status</u>			☐

Things you need to think about:

- What items should be saved in consultations.
- What should be the types of consultations? I suggest the are the same as the OneWorld committees- editorial, fundraising, marketing, technical. This is highly important, as we will be able to search on this field later.
- As consultations can also be saved on individuals, should we use this function? If so when should a consultation be stored on an individual and when on a organisation.

Partnership Packages:

Partnership packages set

1. Who is notified of a new partner, and who can edit/ add new partners for this package.
2. To what geographic areas this partnership application applies
3. The members of the partnership package. (by linking to user groups)

And through the user groups

4. The rights of those partners or organisations on the ez system.

By creating multiple partnership package for your center you will be able to customise you partnership offering to your partners.

This section will give you an overview by creating a new partnership package for the US, which will list organisation in the partnership directory and allow them to be highlighted but will not allow them to post jobs.

List of current partnership packages

<click on package list on the left hand menu>

 contact 

Packages

Name:

OWO News Source (not a partner)	↓		
OneWorld Africa	↓ ↑		
OneWorld Austria	↓ ↑		
OneWorld Canada	↓ ↑		
OneWorld Europe	↓ ↑		
OneWorld Finland	↓ ↑		
OneWorld French	↓ ↑		
OneWorld Germany	↓ ↑		
OneWorld International	↓ ↑		
OneWorld Italy	↓ ↑		
OneWorld Latin America	↓ ↑		
OneWorld Netherlands	↓ ↑		
OneWorld South Asia	↓ ↑		
OneWorld Spain	↓ ↑		
OneWorld UK	↓ ↑		
OneWorld US	↑		

New package

Example of an existing package

<Click on the pencil next to OneWorld US>

 contact

Edit package

Name:

Description:

Annual Partnership Subscription Fees

Package manager:

Oneqworld.net
Partnership manager US
Sarah test

Country:

Greenland
Saint Pierre and Miquelon
United States
United States Minor Outlying Islands

Permissions:

Sarah test
UK - English editors
US Organization
Unimondo - Italiano editors

☒ Allow editorial links

OK Cancel

Definition of fields on the edit package form

Field Name	Description
Name	The name of the package. Example OneWorld US
Descriptions	The description. This is temporarily used as the price information on the signup.
Package Manager	The person who can edit organisation in this package and receives email from the partnership application. Traditionally
Permissions	The right of the members of the partnership package
Country	The country or countries to which this package applies. For example anyone applying from the US will automatically apply to this package and the package manager will receive an email and the organisation will appear in the list of applications to post..
Allow editorial links	Allows editors to link to the content. If it is not clicked editors cannot use this organisation content.

The US organisation permissions.

Edit Group

Name:

US Organization (paid)

Description:

Organisations based in the us who have paid susbscription.
They have the following permissions.
add jobs, highlighted by editors, and any other service offered
by OneWorld us

☐ Root permission (admin login, all rights)

Session Timeout:

0

Group URL:

Module specific permissions

The Partnership manager US permissions



user

Edit Group

Name:

Partnership manager US

Description:

This sets the permissions for the US partnership managers

☐ Root permission (admin login, all rights)

Session Timeout:

0

Group URL:

To which Roshani Kothari belongs

Name:	E-mail:	Login:
Roshani Kothari	roshani.kothari@oneworld.net	rkothari

Creating a new package:

We are going to create a new package for OneWorld US. It will be for partners who want to join OneWorld but who are unwilling to pay the partnership subscription.

To begin we will need to create one new group to set the permissions for the organisations which are part of this package.

<select the user module>

<http://admin.ez.vaux.oneworld.net:7307/user/userlist/> or click on user icon.

	Select New group from the left hand menu on the user section.
--	--

< Fill in the details for the new partner group as in the example below. > (This will be an administrative function)

<submit>

New Group

Name:

OneWorld US Free

Description:

Used for partnership package OneWorld US

Partners based in the US who do not pay for partnership. They only receive directory list and can be highlighted. They do

☐ Root permission (admin login, all rights)

Session Timeout:

Group URL:

You need now to create a partnership package for this group.

 contact

Edit package

Name:
OneWorld US Free

Description:
Partnership package for OneWorld partners who do not pay. Are listed in the partnership directory and might be

Package manager:
Oneqworld.net
Partnership manager US
Sarah test

Country:
Greenland
Saint Pierre and Miquelon
United States
United States Minor Outlying Islands

Permissions:
OneWorld Spain - Spain editors
OneWorld US - OneWorld US editors
OneWorld US Free
OneWorld.net - English editors

☒ Allow editorial links

You can now link partners to either of the groups, by visiting the partner details page and selecting the partnership packages to which each partners belongs. Any new partners will be added to each group, and it will be up to the partnership manager to either accept or decline.

Partnership packages

Partnership packages:



Things you will need to think about:

1. Who will be in your package manager group.
2. If you plan to have two partnership packages at your centre, which package should be the default in the application process.
3. What services should the different packages offer?
 - Currently access to jobs and highlighting can be controlled.
 - Any other service can be controlled in a similar fashion but will need to be configured at the centre level.

Adding a new service

TO allow for each of the centers to be able to offer a range of services to their partners, OneWorld centres must be able to offer these services to partners. While some services are centralised with OneWorld international such as jobs and highlighting, the current system allows you to introduce new services provided by third parties.

I will use the provision of Dgroups to partners in the following example.

Final product:

Login as partner/ partner

<Go to <http://ez.vaux.oneworld.net:7307/article/view/26651/>>

> Partner Feedback > Post your organisation news > Post a shop listing > Get partnership badge > FAQ > Privacy Policy - Request a discussion forum	Dgroups request from The existence of a dgroup presupposes a process that involves forethoug agreement about how starting the dgroup is strategically aligned to your . Remember, Dgroups is just a tool. Before you rush to create a dgroup for your organisation, ensure that you The purpose: What do you want your dgroup to do for your organisation? through the dgroup? The name: What do you want to call your dgroup? The description: How will you describe your group to others? The people: For whom are you starting the dgroup? The nature of access: Do you want your dgroup to be accessible to ever internal, organisational use? For more information about Dgroups visit the Dgroups training on our supp <u>Instructions</u> Long Name (used in descriptions, titles, etc.) : Short Name (one word, used in URLs, mailing lists) : Short Description (one sentence) : Describe who can participate in this workspace: :
--	---

Creating a new service Step by Step.

NB It is assumed that you have already followed a course on how to create an article.

This is a three-part process.

1. You will need to create a form
2. Create an article to contain the form
3. Add the article to the partner login menu.

Creating a form

	GO to the form module http://admin.ez.vaux.oneworld.net:7307/form/form/list/ and on the left hand navigation select new form.
---	---

Fill in the fields

Edit form

Name:

Send form to: Send copy of form to:

Show this page on completion: Show this page if user wants instructions:

Your e-mail address: ☐ Let user select sender

Description of fields in “new form” form

Field name	Description
Name	Name of the form, to be used in lists.
Send form to:	Where the form is sent. Currently this is an email recipient
Show this page on completion	The page where the user is redirected after they sign up. Normally would be a confirmation screen.
Your email address	Self explanatory
Send copy of form to:	The cc field in the email message
Show this page if the user want instructions	An link to another page. Is inserted as a link at the top of the form saying instructions
New element	Allows you to create select boxes, text fields
Let user select email	This allows the user to state the email from where the email is sent.

Here is the completed form for D-groups

Edit form

Name:

Send form to:

Send copy of form to:

Show this page on completion:

Show this page if user wants instructions:

Your e-mail address:

☐ Let user select sender

Name:	Type:	Size	Break	Required:	
Long Name (used in descriptions)	Textline	20	☒	☒	↓ ↑
Short Name (one word, used in	Textline	20	☒	☒	↓ ↑
Short Description (one sentence	Textline	20	☒	☒	↓ ↑
Describe who can participate in	Textline	20	☒	☒	↓ ↑

Adding the form to an article.

<Create a new article>

<Place it in the partnership information category>

<At the bottom of the screen select form and add item> (image below for details)

☐ Enable user comments

☒ Publish article

Files

Files
Attributes
Form
Poll

.net - English

<Click add item>

<Select the form which you create earlier.>

The form is now linked to the article. You must now insert it into the article by using the <form> in the body> (see below)

Main body copy:

Before you rush to create a dgroup for your organisation, ensure that you think through the following:

The purpose: What do you want your dgroup to do for your organisation? Or, what does your organisation want to do through the dgroup?

The name: What do you want to call your dgroup?

The description: How will you describe your group to others?

The people: For whom are you starting the dgroup?

The nature of access: Do you want your dgroup to be accessible to everyone or do you want to set it up for your internal, organisational use?

For more information about Dgroups <popu link
<http://www.common-space.org/dgroupsadmin/> visit the
Dgroups training on our support center >

<form>

**Preview the article and once you are satisfied
Press ok.**

Creating the menu item.



Got to the site manager module.

<http://admin.ez.vaux.oneworld.net:7307/sitemanager/menu/list/>

click on Menu config and drill down by clicking,

- oneworld.net,
- partners,
- partners left logged in.

You will end up at a screen that looks like the following.

Menus

(1-8/8)

> Top / oneworld.net / Partners / Partners left main logged in

ID	Name	Link
98	Post a job	/article/view/21567
97	Partner Feedback	/article/view/21531/
92	Post your organisation news	/article/view/21568
93	Post a shop listing	/article/view/21532/
94	Get partnership badge	
95	FAQ	
90	Privacy Policy	
242	Request a discussion forum	/article/view/26651/

New menu

Delete menus

The last step is to create a menu item for the article

Menu edit

Name:

Link:

Parent:

italian-Bottom menu line - About

unimondoe.net

Partners left main logged in

Partners left main no user

Agriculture

Type:
Header: ☐
Link: ☒
Category: ☐

Field name	Description
Name	The name of the as it will appear on the menu
Link	The address of the url
Parent	The menu which the item is place
Type	
Header	It is a section header
Link	It is a hotlink to another page
Category	It is a category

Things you need to think about:

1. What service might you want to offer in this manner? Currently it would be suitable for webhosting offered by OneWorld Africa, training course, Partner Publishing, asking for a new Dgroup, or contacting a partnership manager.
2. How you will promote center level services on your site

Light sign up feature

One of the biggest concerns for the partnership group with the existing application procedure was that it was too complex and long for many of our users. To simplify the existing signup procedure the following features were asked for in the cms spec.

- Downloadable form for offline signup.

- No select boxes
- A light signup
- Multiple partnership packages

All but the select boxes are in place but implementing these will have implications on the workload of your center. Looking at the site as it stands at the moment the light signup works as follows.

The user is asked to fill in the minimum amount of information so that a partnership manager can process an application.

Register a new user

First name:

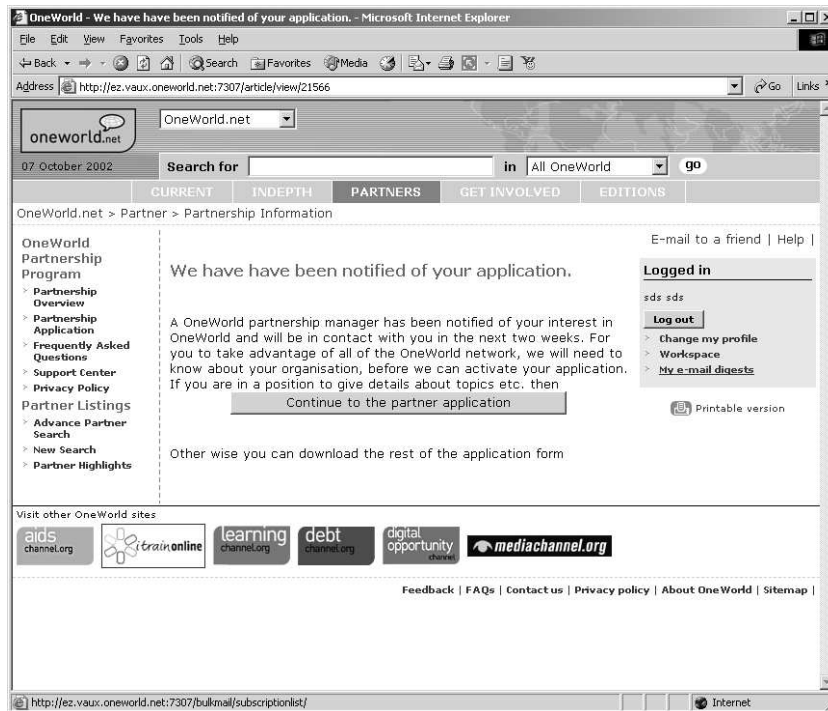
Last name:

User name:

E-mail:

the partnership manager as well as the future partner will receive an email confirming of their registration and the partner will be redirected to a page where they can continue to

- fills in all the details of the application form,
- Downloads the application form and completes it offline
- Or waits until the partnership manager contact them and fill in the rest of the application later.



Things to think about

1. The offline form will require the partnership manager to copy and paste the information from the form to the EZ backend.
2. The light signup will require the partnership to follow up with the partner.
3. What is the minimum amount of information you require to process an application?