PDF Directory Tutorial

Version 0.2.beta

February 7, 2005
Introduction

The benefit of using PDF Directory to create you directory is in the exchange of member data and in a collaborative effort in putting the pieces together. It was designed with this end in mind. The interface may not seem very intuitive so I hope this tutorial will help. It will take you through the administrative process.

Although it may seem overwhelming at first, it is really a simple process for the majority of those who will use this product. The administrator has some additional burdens in defining the organization’s structure and the restriction of user access.

The majority of the users will only enter member data and assign the members to their teams. Once you are past the administrative cycle, then to the user, it will seem intuitive.

Additionally, once the organization structure is created, it will change very little from year to year. Also, you will more than likely have return members. Several will need data changed but most will be at the same address and phone.
Document Creation Sequence Chart

Will Admin assign a Global user to assist with the document maintenance?

Y
Create Global Users

N
Assign Titles

Assign Groups

Will Users be Restricted?

Y
Add Local Users and Designate Which Groups they can Access

N
Enter Members

Assign Teams

View Document

Create Custom Pages Offline and Upload and Insert in the Desired Location

User assignment is done by an Admin account. A Global user can perform all tasks and a Local user can enter members and assign teams in their respective group.
Initial Screen

When you first logon you will see the following.

The bold blue text to the upper left will be the name of your organization. This will change in this step when we do the configuration. The menu is done with the blue hyperlinks separated by the | symbol. The statistics tell you some information about the organization. You will initially see 1 User, the default admin account that was created automatically. You also see 1 Group because for our purposes, we treat the top level of the organization as the “Root” group.

To proceed, select Configuration from the menu.
Configuration

Here we can enter a name for our organization and some page setup information. In the current release there are issues with units other than point which is equivalent to 72 points per inch. The above translates to 5.5 by 8.5 in. We will leave page settings as is for now and come back when we insert the Table of Contents.

**Enter a Name** of your choice and hit the Enter Button. In this example I will choose Weekend Warriors Soccer League.

We are now ready for the next step which is to create a **Global** user. Choose the **Users** link from the menu to proceed.
Add a Global User

Weekend Warriors Soccer League

User Management

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
<th>User Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Admin</td>
</tr>
</tbody>
</table>

Users

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
<th>User Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin5</td>
<td></td>
<td>Admin</td>
</tr>
</tbody>
</table>

Notice that you now have your organization's name in the bold blue upper left section. You also have a section with a link to the right of Add New User and a list of users below the Users label, which currently consists of only the default Admin account. The User Name is admin5 (yours may vary). The Password is blank and the User Type is Admin. The password will only be updated if something is entered in this field. It is recommended that you do this with the default Admin account.

Enter into the first row User Name and Password and select Global from the User Type dropdown selection, then select the Add New User hyperlink. I will choose a User Name of wwboss.

From here on out the Admin user can delegate remaining responsibilities to the newly created Global user. We will continue here under the Admin account. Proceed to the next step by selecting Titles from the menu.
Add Titles

Weekend Warriors Soccer League

Title Management

New Title Type

You have an option to enter a new “Title Type”. This is a grouping of Titles. In our Example we will create a Team Title Type and a Referee Title Type.

Enter Team in the box and select the New Title Type hyperlink.
It now appears with options to create a New Title or to Delete “Team”. Let’s add Titles to the “Team” Title Type.

**Enter** Coach in the box under **Team** and select the New Title hyperlink.

**Enter** Player in the box under **Team** and select the New Title hyperlink.

Notice that you can edit your Titles by changing the text and selecting the Update hyperlink or you can delete the Titles by selecting Delete. Also if you wish to re-order the Titles you can do so by selecting the ^ link to move it upward.

Repeat the previous steps by adding a “Referee” Title Type with Titles of “Line Judge” and “Field Judge”
Now we will proceed to creating **Groups** by selecting the **Groups** hyperlink.
Add Groups

Here you will need to stop and think things through a little bit. Currently no re-ordering of the Groups is implemented. The document will print in the order that Groups appear in the hierarchy. We will keep our example simple but keep in mind that you can nest Groups to several levels for example

```
    East
     ↓
    Over 30
     ↓
    Men

    Root
     ↓
    Over 40
     ↓
    Women

    West
     ↓
    Over 30
     ↓
    Co-ed
```

Will print in the following order:

Root Teams > East Over 30 Men > East Over 30 Women > East Over 30 Co-ed > East Over 40 > West Over 30 > West Over 40

Enter “Over 30” and select Add Root Level Group. Repeat for “Over 40”
Notice we could continue with the options of **Add Group in Over 30** and **Add Group in Over 40** to continue a real word hierarchy. We will keep it simple in this tutorial.

**Update** and **Delete** are as previously stated.

Now we have enough information entered to assign restricted Users. **Return** to the **Users** section by selecting **Users**.

**Add users** “old” and “young” as previously described only this time select Local from the **User Type** dropdown selection
Notice that we now have the additional option of selecting a Group. Local users can do nothing until they are assigned one or more Groups.

Select “Over 30” from the dropdown list for “young” and select Add. Select “Over 40” from the dropdown list for “old” and select Add.
The list of **Groups** appears for the respective **User**. **User** “old” will be restricted to the “Over 40” Group and User “young” will be restricted to the “Over 30” Group.

Now we are ready to delegate responsibility to the users. This is where the real benefit of this approach comes into play.

I will log off and log on as “old” to illustrate how this will appear. You may proceed as the Admin account.

**Select** the **Members** link.
Notice that as I said I would logon as a Local user, you can see that the administration options are no longer available. This should be straightforward as far as entering the data goes.

Enter **Members** of Fred Flintstone and Barney Rubble. Make up any information.
Add Members

Notice as you scroll down the screen, you see that Member appears with the recently entered information. You can give it a final look and Edit if there is something you don’t like.

The member search field will allow you to check to see if a member is in the system before entering the data. If you enter a Last name (partial ok) and hit the Search Button, the name or names will appear also as above. To search for all members use the % symbol.

Select Teams from the menu.
Add Teams

Weekend Warriors Soccer League
Members | Teams | View PDF | View Booklet | Help | Logoff
Team Management

Root
Over 40

<table>
<thead>
<tr>
<th>Team Name</th>
<th>Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Team</td>
</tr>
</tbody>
</table>

Add Team in Over 40

Over 40

The Local User will see only their Groups so in my case I only see “Over 40”. If you remember that as Admin we created Titles. We have a group of Titles for “Team” and “Referee”. In our example we will make a Team of type “Team”. In the real world we would probably want to make a Team of “Referees” followed by several Teams of the “Team” type.

Enter Rockies under Team Name and select the “Team” under Titles and choose Add Team in Over 40.

Now we can add Members to the Team “Rockies”.
Weekend Warriors Soccer League

Members | Teams | View PDF | View Booklet | Help | Logoff
Team Management

Root

Over 40

<table>
<thead>
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<th>Team Name</th>
<th>Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Team</td>
</tr>
</tbody>
</table>

Add Team in Over 40

Member Search

<table>
<thead>
<tr>
<th></th>
<th>Find Members to add to Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rockies</td>
<td>Update Delete</td>
</tr>
</tbody>
</table>

Over 40

To do so we must search for a Member under **Member Search**. **Search for Mr. Flintstone by typing** “fl” in the **Member Search** box and selecting **Find Members to Add to Team**.
You will get a list of all **Members** that start with “fl” to choose from and a list of all **Teams** in “Over 40” in both cases there is only one option. You have an additional choice of a **Title** for the **Member**. You will always by default have the option of having untitled **Members** which would mean that you leave this option blank. Choose “Coach” from the box and select **Add**. Repeat selecting Mr. Rubble as a “Player”.
The Titles can be changed at any time by selecting a different one from the list. Also you have an option to Delete a Member from a Team. The Member will remain in the database, they will only be removed from the Team. If you wish go back to the Members section and search for either Member. Notice that there is now no longer an option to delete these 2 Members because they are assigned to a team. User “young” still has access to all the Members but “young” cannot delete “old’s” Members because they are assigned.

Select View PDF and scroll to the “Over 40” page to see how your team looks.
You will notice that other things look out of place at this point. This will all come together when all the pieces are in place as you will see shortly. I will now logoff and re-logon as Admin.

Select Pages from the menu.
Add Custom Pages

This interface has 3 sections. A tree to the left which outlines the structure of the document. Notice our Groups and our Team appears. This tree represents insertion points for the pages you create offline and upload. There is also an insertion point at the end, which would be your back cover. To the right there is an Upload section and a Pages section. The Upload section is self explanatory. Once uploaded, the pages will appear under Available Pages for selection.

Create 3 offline PDF files (any content) and Upload. Be sure to include a Description. I will make Front, Back and Copyright.
They are now available for insertion. To insert, **Select** the “Front” Page. It will appear in the **Pages** box. Now choose “Over 30” from the tree.

This box gives you the option to **Insert**. The insertion point will be where you selected from the tree. You can back out with the **Cancel** option. An additional option of Page Break is available. When checked, a page break will be generated before this group. This is useful if you have a small group. If it will fit with the previous section, you can uncheck this box.

**Choose Insert.**

Repeat for putting the “Copyright” page after the cover (before “Over 30”) and the “Back” page at the end.
Once pages are inserted, you can select them and you will get a similar dialog to the one above. It will have additional options of Remove and View. Page breaks are automatic.

At this point you should be able to view the PDF document and it should look ok. One final task is to return to the Configuration. Change the TOC Page option to 3. This will insert the TOC on the 3rd page. You will have the Front, followed by Copyright, then the TOC page.

I hope this clears up some confusion. If you still have doubts or concerns, please feel free to contact me at rbondi@users.sourceforge.net. Also welcome are your comments and suggestions.