

# PDF Directory Tutorial

Version 0.2.beta

February 7, 2005

## **Introduction**

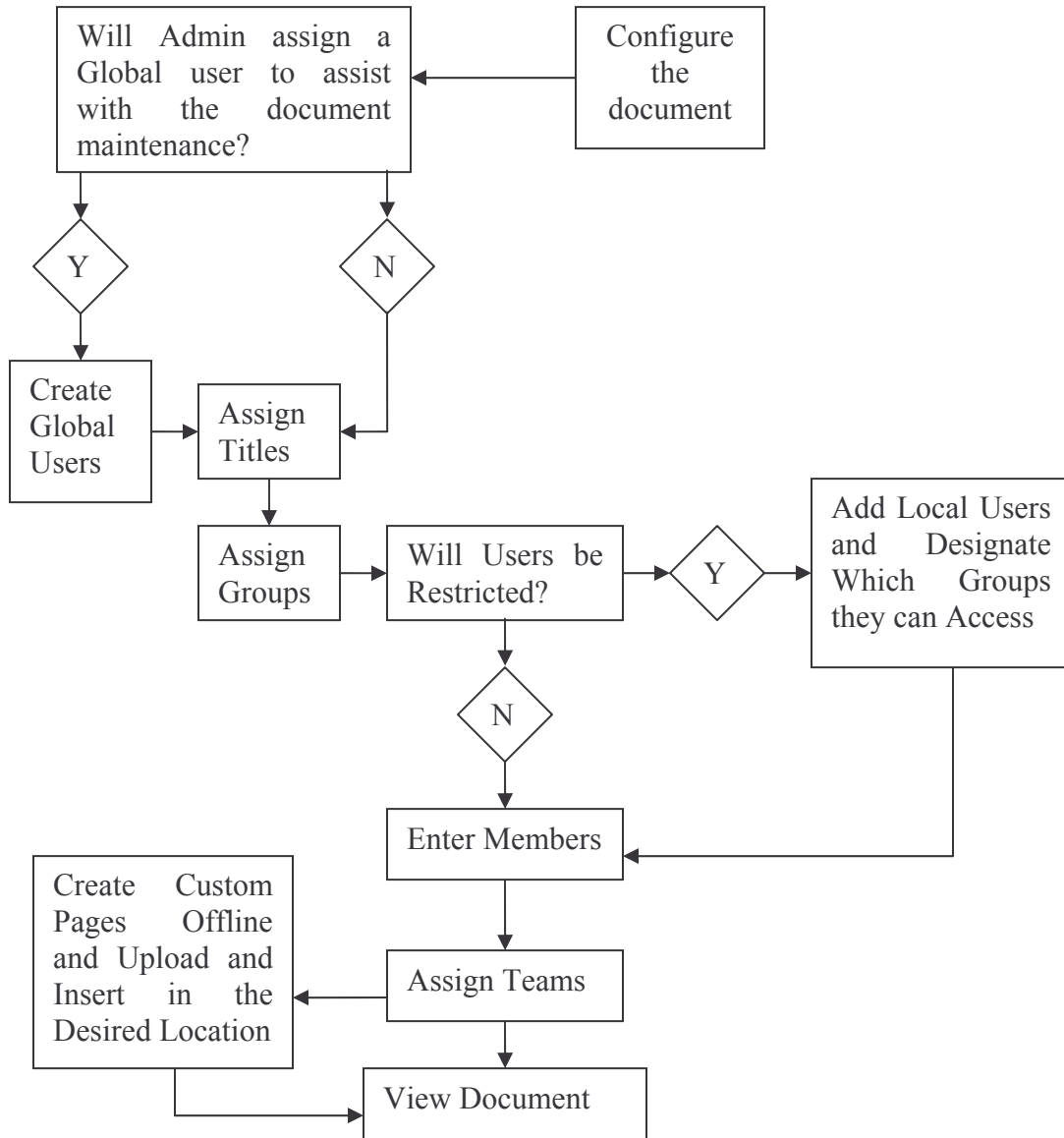
The benefit of using PDF Directory to create your directory is in the exchange of member data and in a collaborative effort in putting the pieces together. It was designed with this end in mind. The interface may not seem very intuitive so I hope this tutorial will help. It will take you through the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

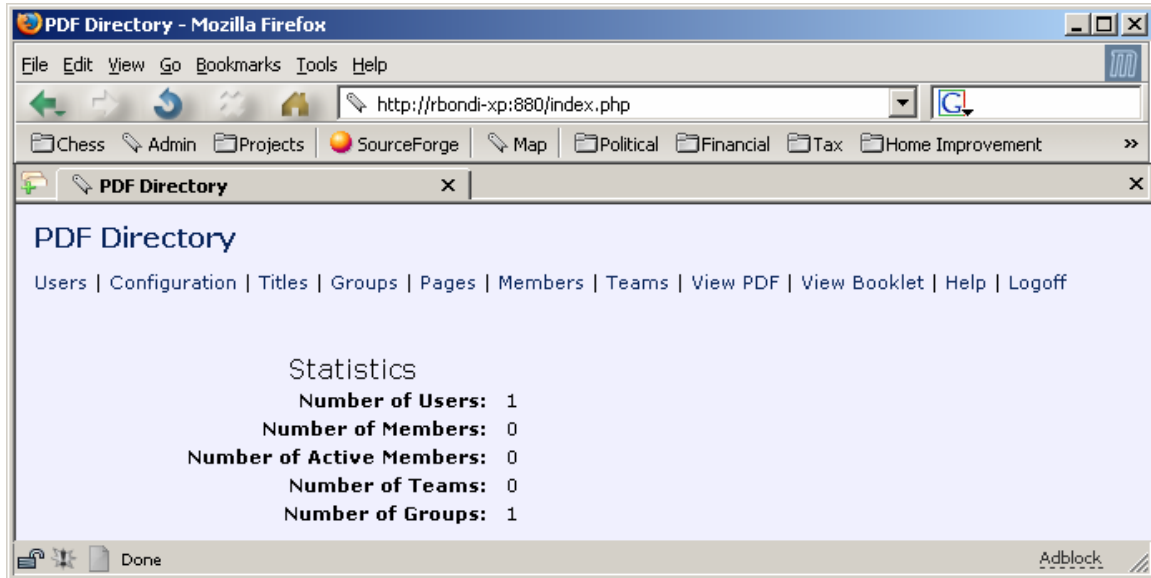
# Document Creation Sequence Chart



*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

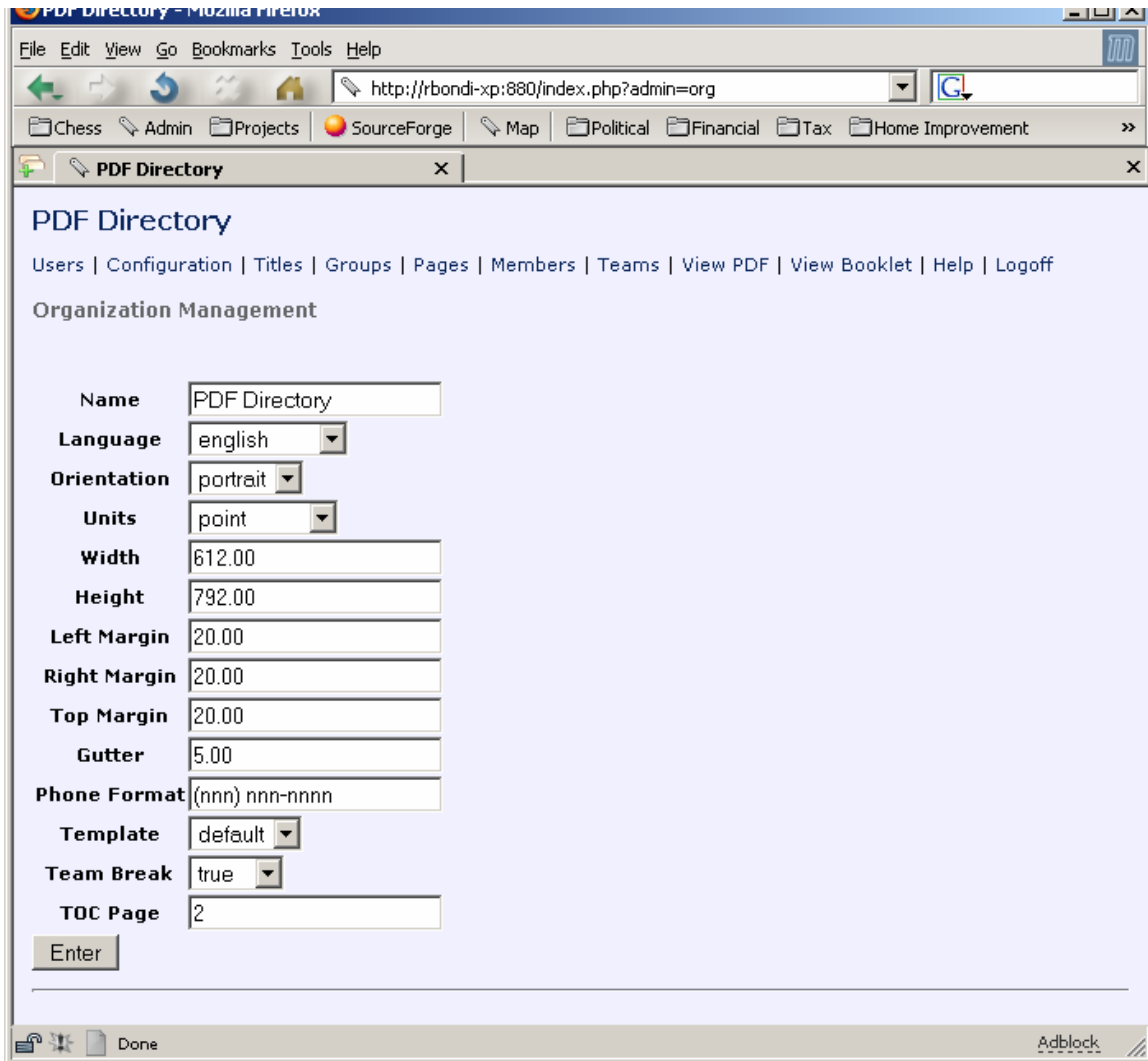
When you first logon you will see the following.



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

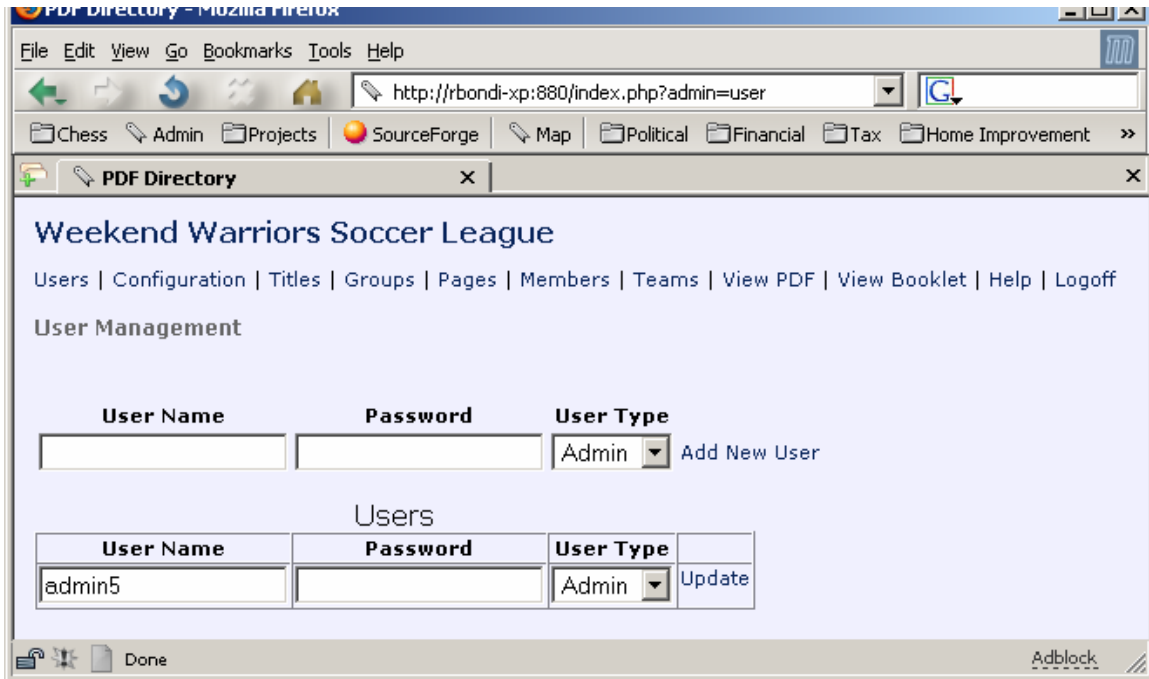


Here we can enter a name for our organization and some page setup information. In the current release there are issues with units other than point which is equivalent to 72 points per inch. The above translates to 5.5 by 8.5 in. We will leave page settings as is for now and come back when we insert the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

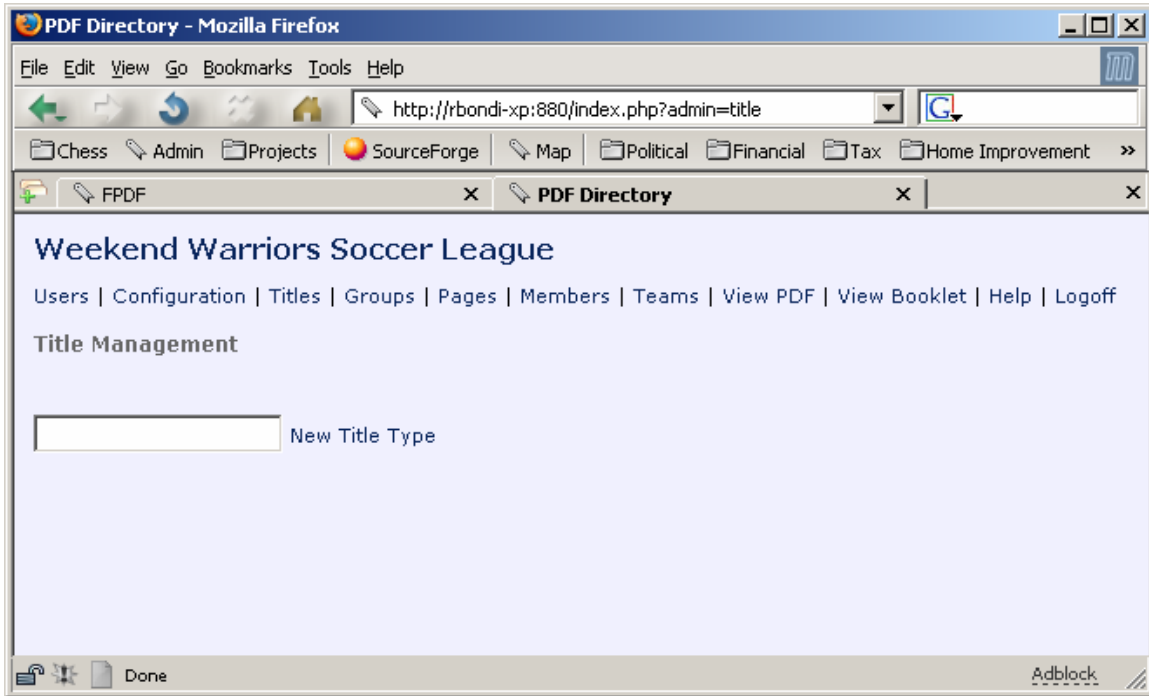


Notice that you now have your organizations name in the bold blue upper left section. You also have a section with a link to the right of [Add New User](#) and a list of users below the **Users** label, which currently consists of only the default Admin account. The **User Name** is admin5 (yours may 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



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**.

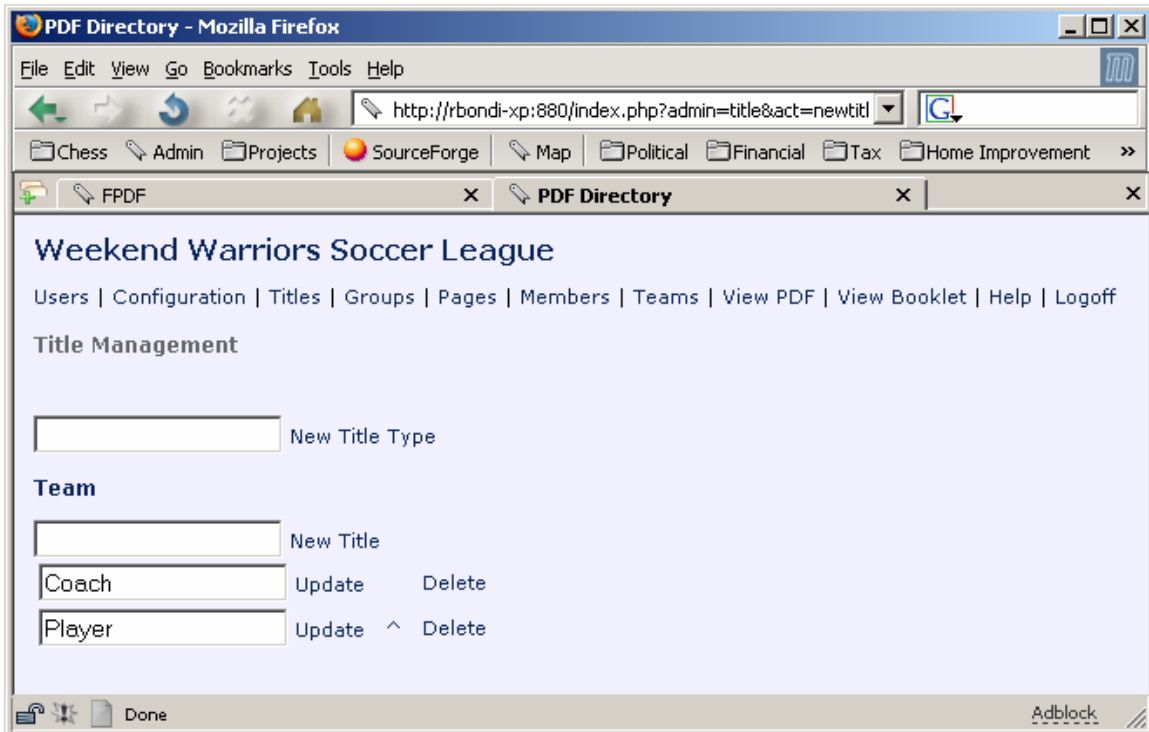
**Enter** Team in the box and select the **New Title Type** hyperlink.



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.

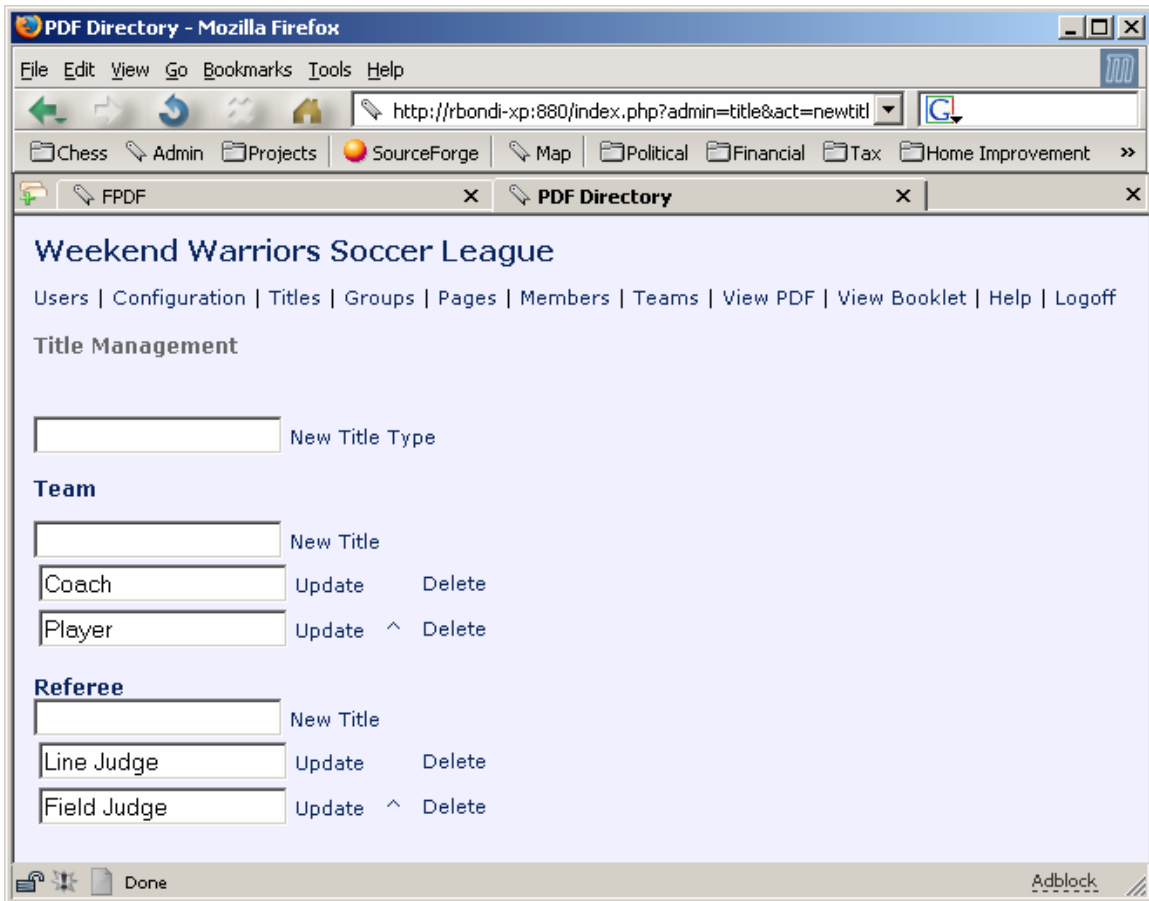
**Enter** Player in the box under **Team** and select the **New Title** hyperlink.



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”

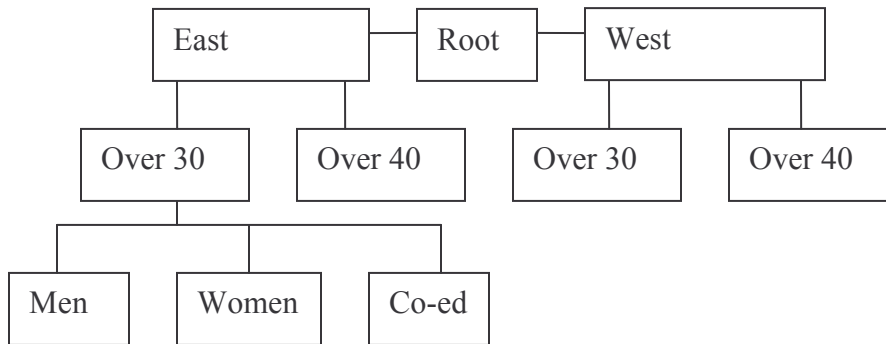




Now we will proceed to creating **Groups** by selecting the [Groups](#) hyperlink.

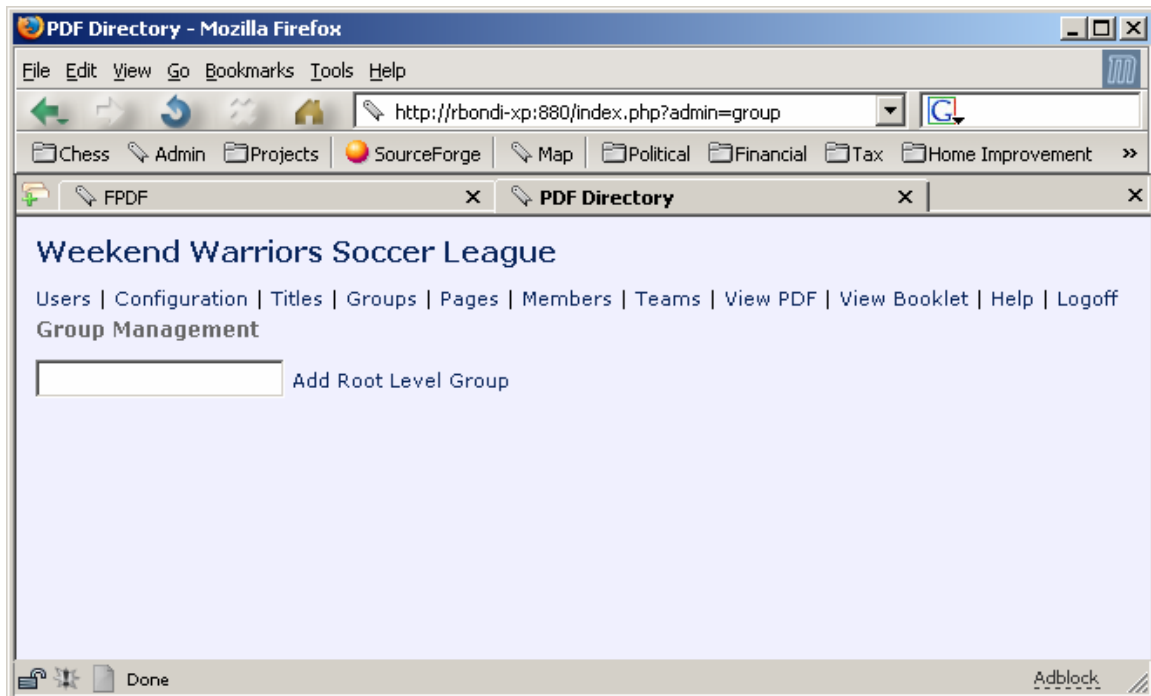
## Add Groups

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

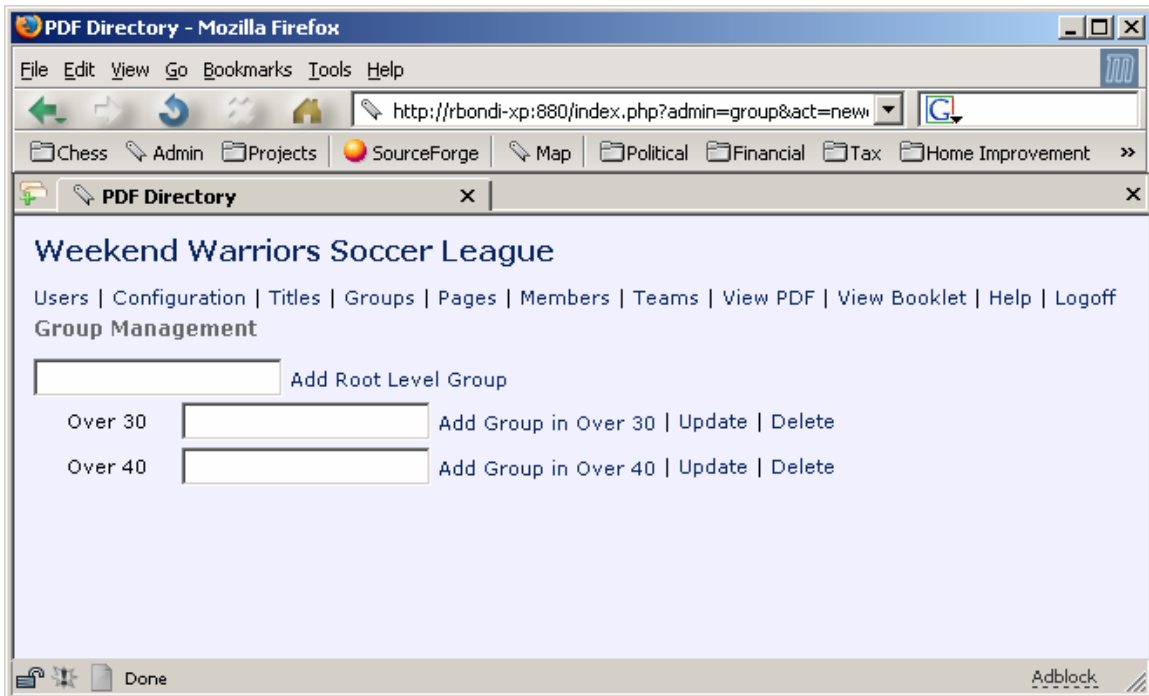


Will print in the following order:

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”



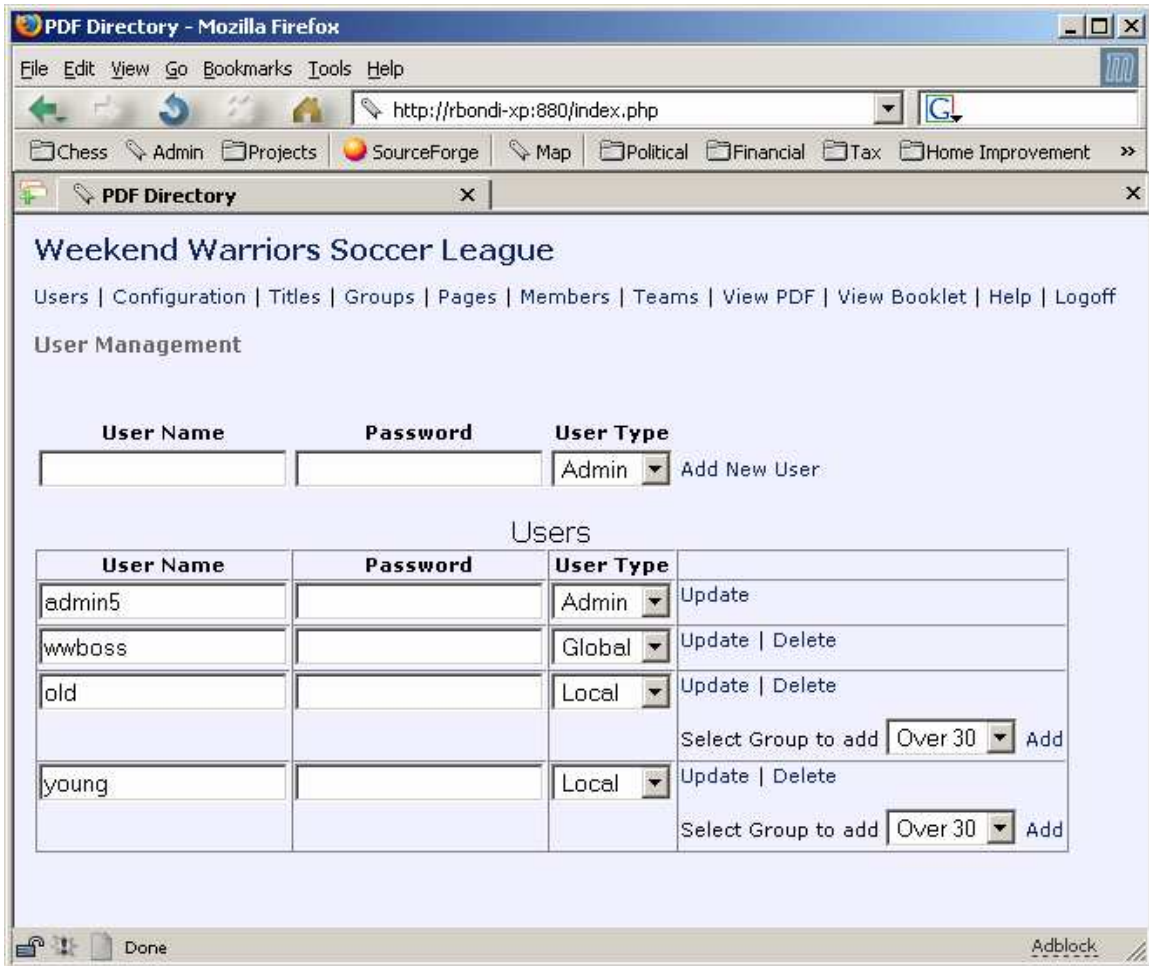
Notice we could continue with the options of [Add Group in Over 30](#) and [Add Group in Over 40](#) to continue a real word hierarchy. We will keep it simple in this tutorial.

[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](#).

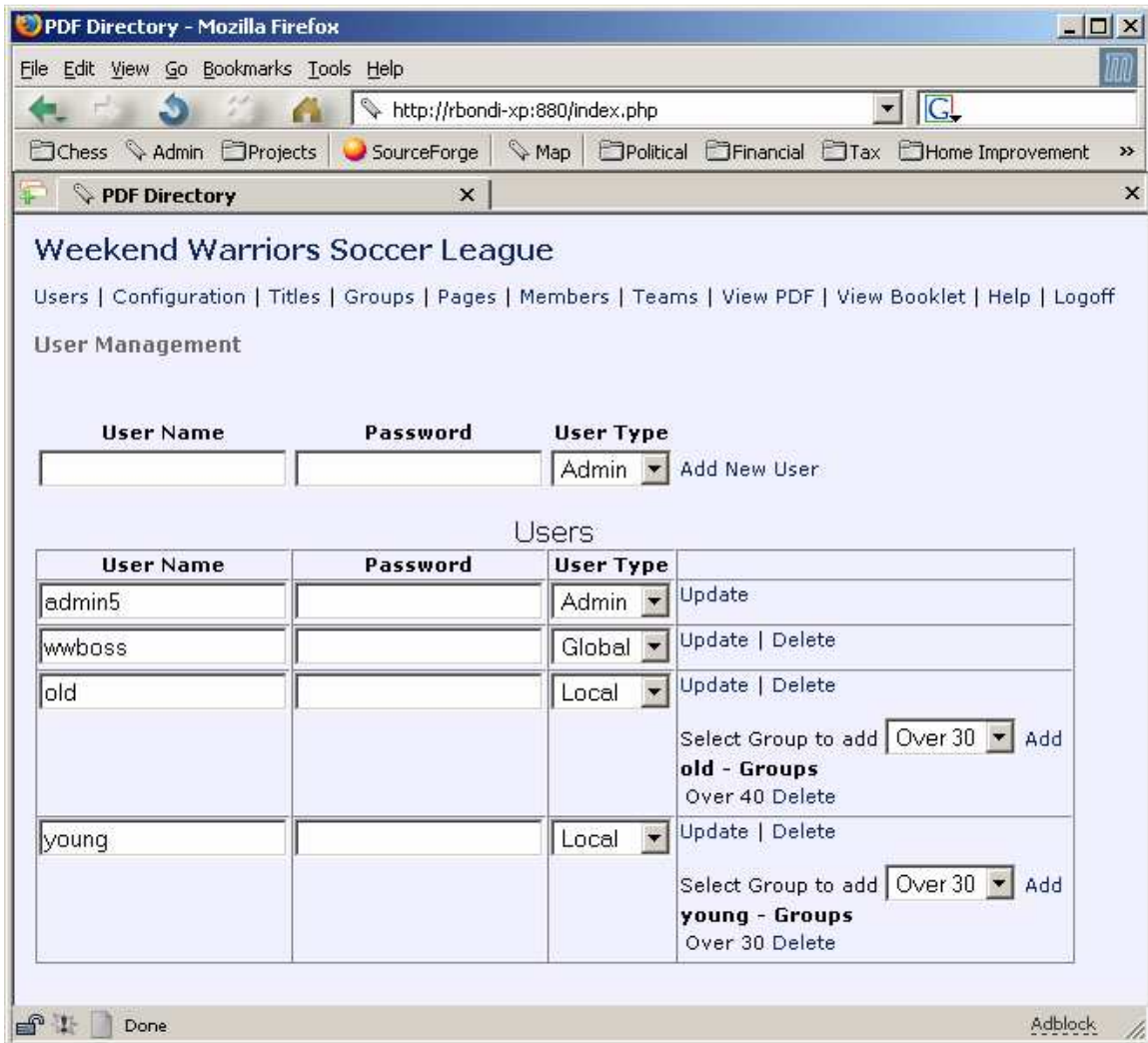
**Add users** “old” and “young” as previously described only this time select Local from the **User Type** dropdown selection

# Restrict Users



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**.

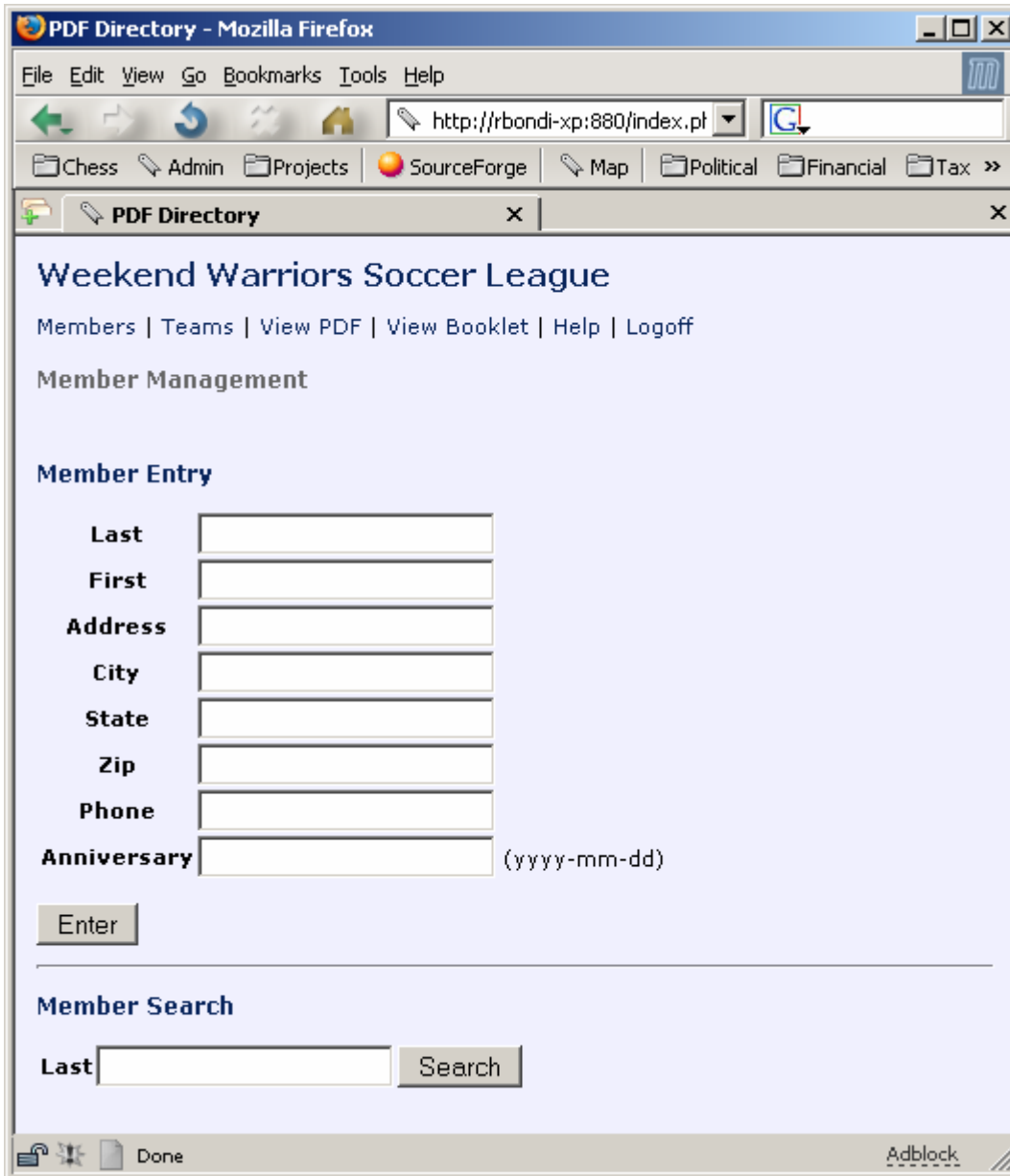


The list of **Groups** appears for the respective **User**. **User** “old” will be restricted to the “Over 40” Group and **User** “young” will be restricted to the “Over 30” Group.

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.

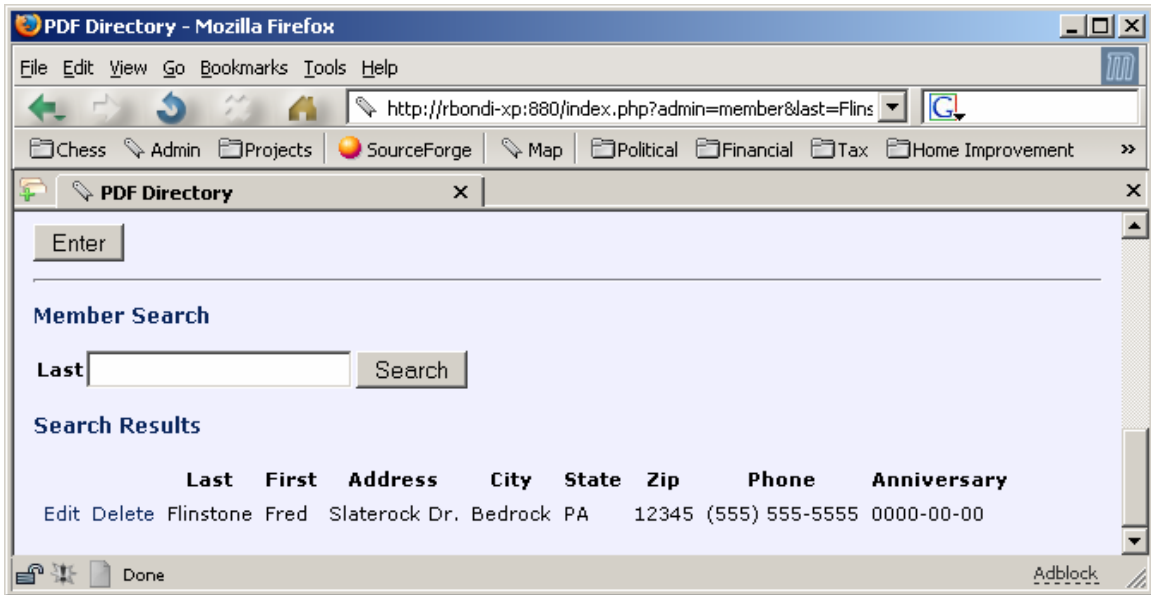
**Select** the [Members](#) link.



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

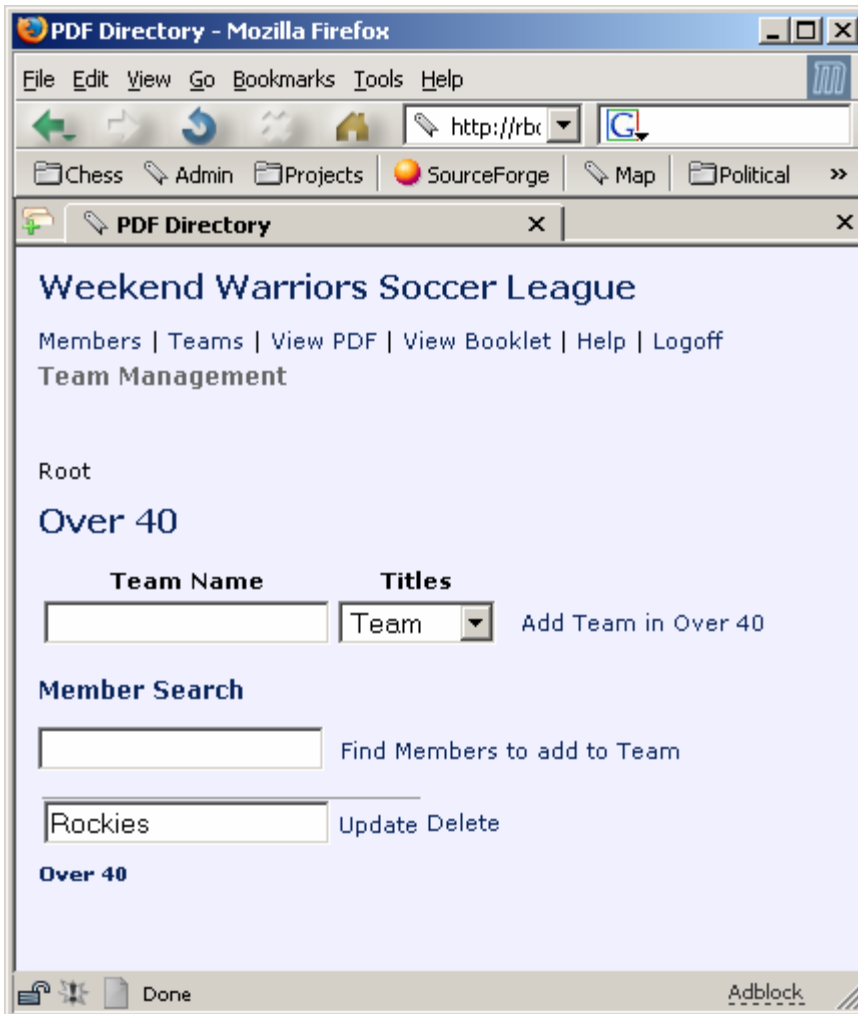


The **Local User** will see only their **Groups** so in my case I only see “Over 40”. If you remember that as Admin we created Titles. We have a group of Titles for “Team” and “Referee”. In our example we will make a **Team** of type “Team”. In the real world we would probably want to make a Team of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

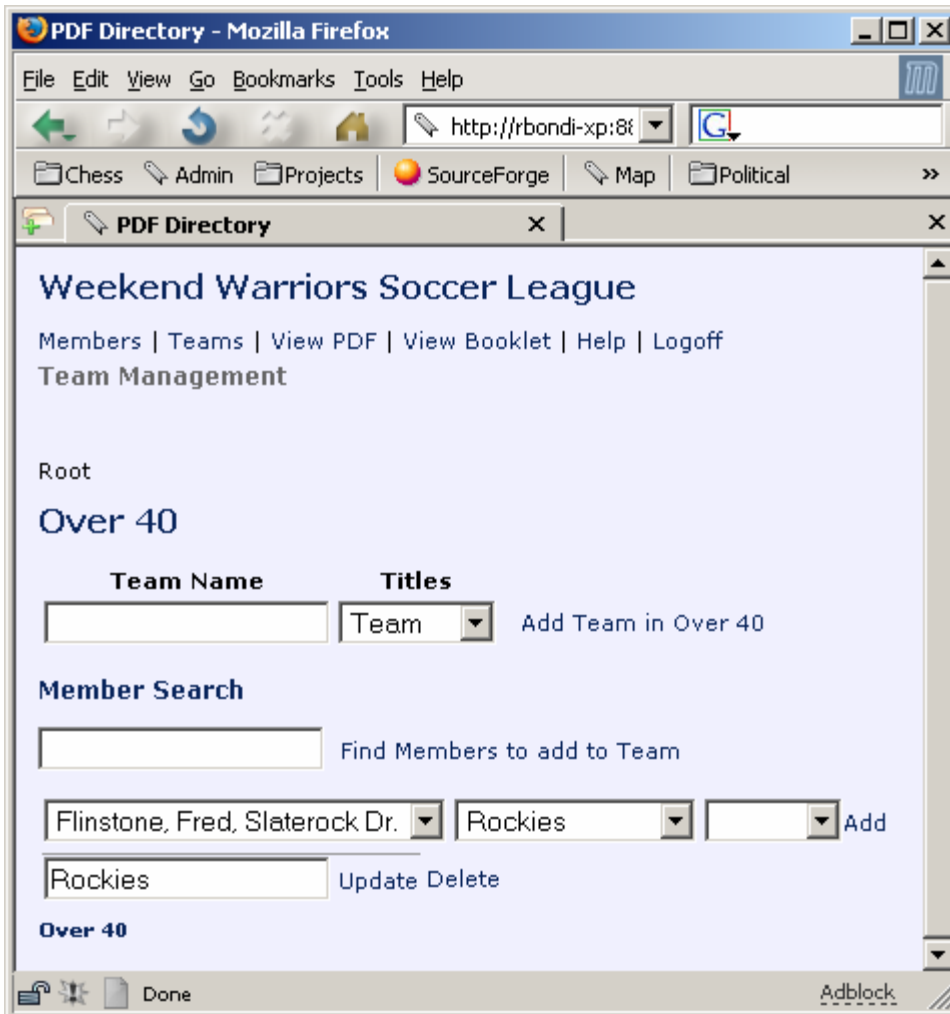
Enter Rockies under **Team Name** and select the “Team” under **Titles** and choose [Add Team in Over 40](#).

Now we can add Members to the Team “Rockies”.

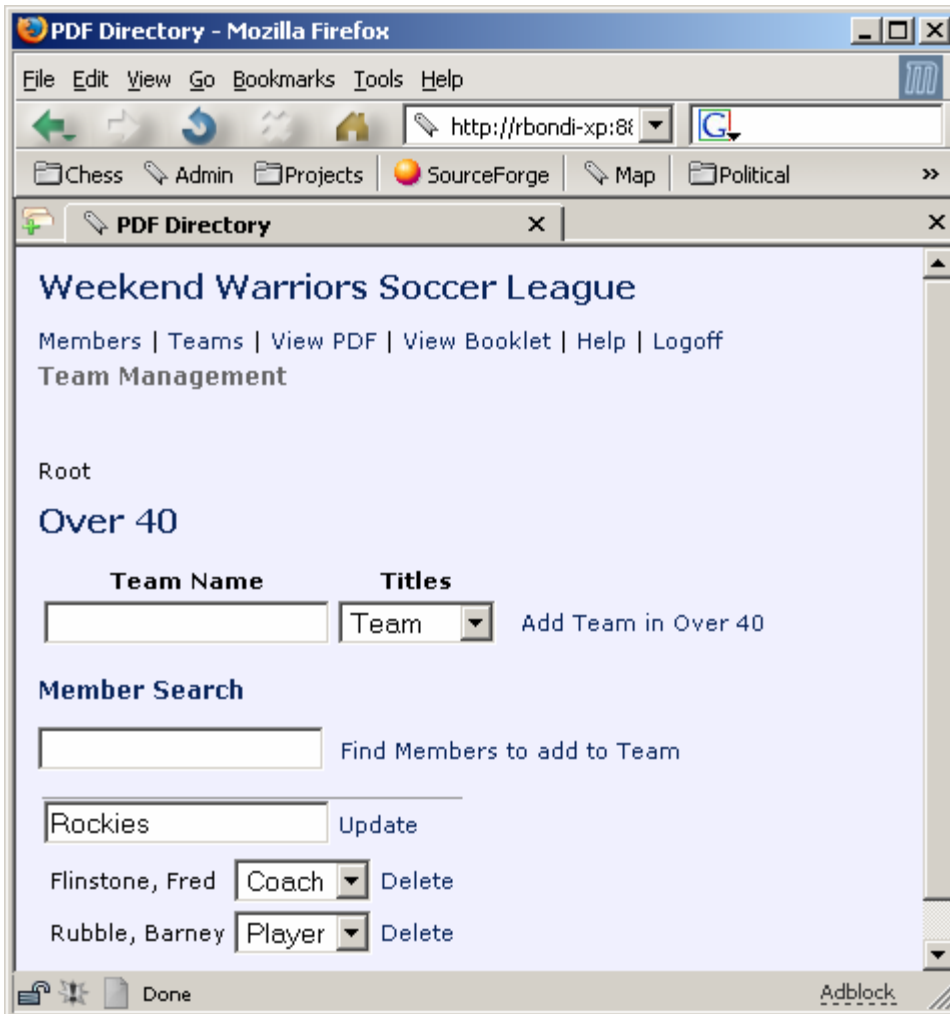




To do so we must search for a Member under **Member Search**. **Search for Mr. Flintstone by typing** “fl” in the **Member Search** box and selecting **Find Members to Add to Team**.

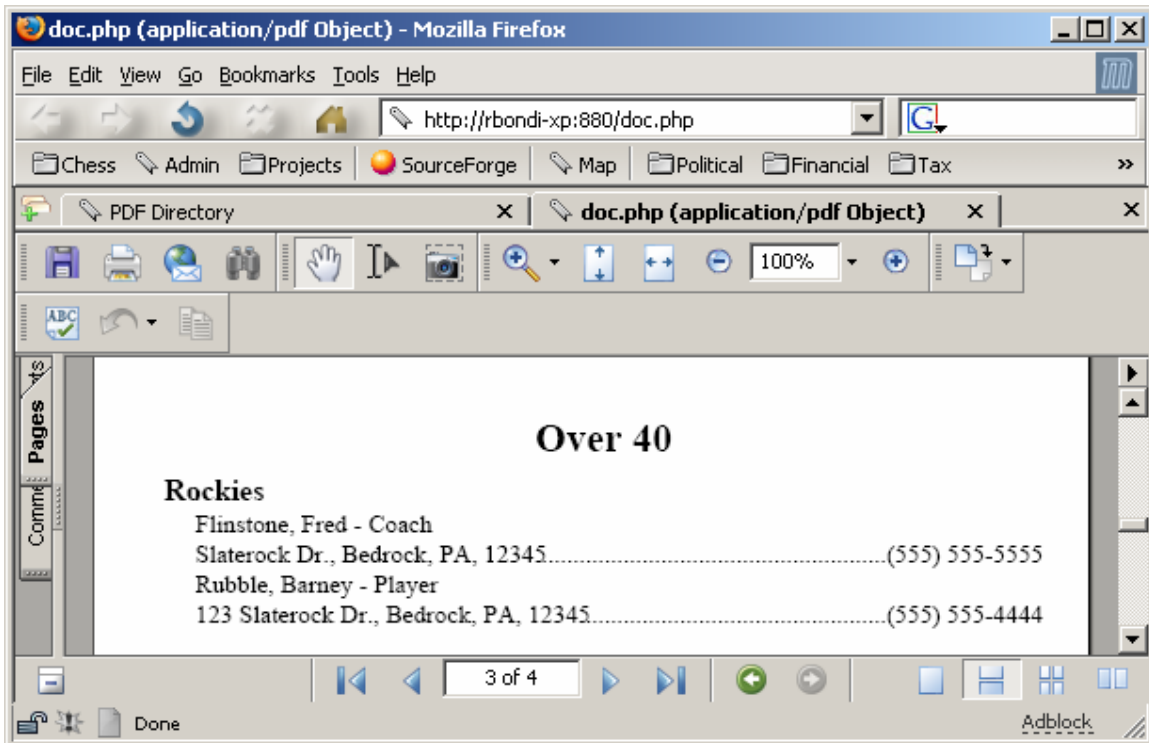


You will get a list of all **Members** that start with “fl” to choose from and a list of all **Teams** in “Over 40” in both cases there is only one option. You have an additional choice of a **Title** for the **Member**. You will always by default have the option of having untitled **Members** which 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.

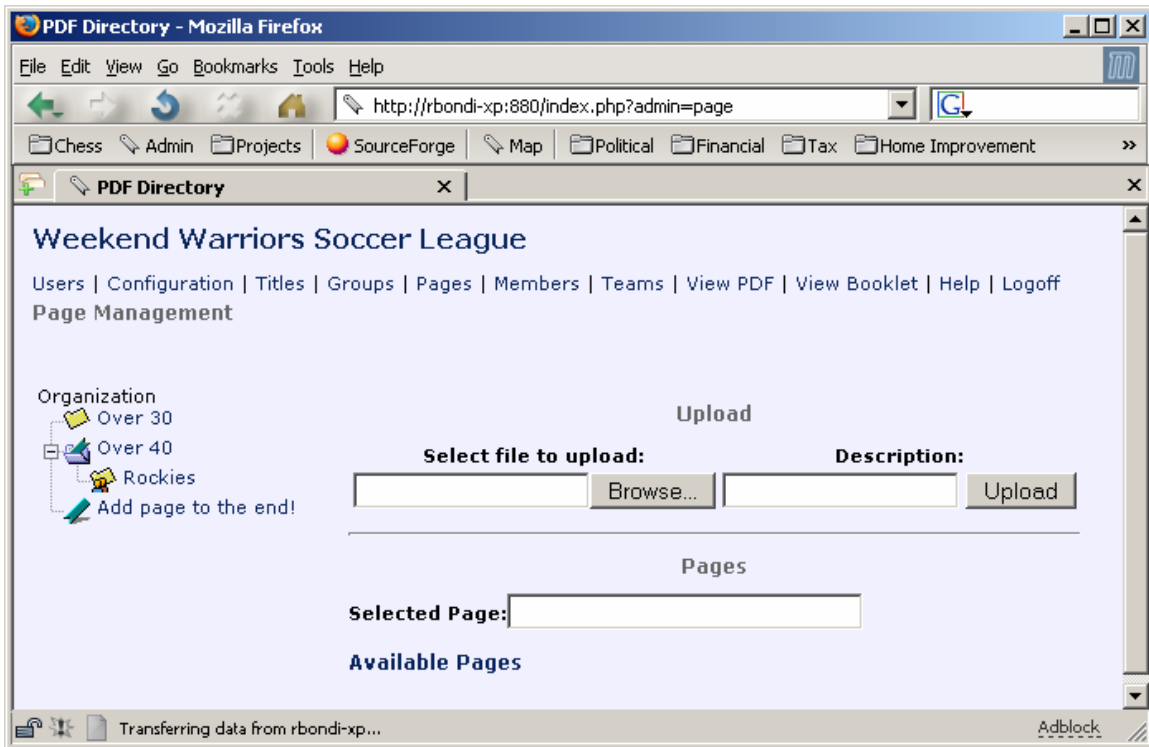
**Select** [View PDF](#) and scroll to the “Over 40” page to see how your team looks.



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 relogin as Admin.

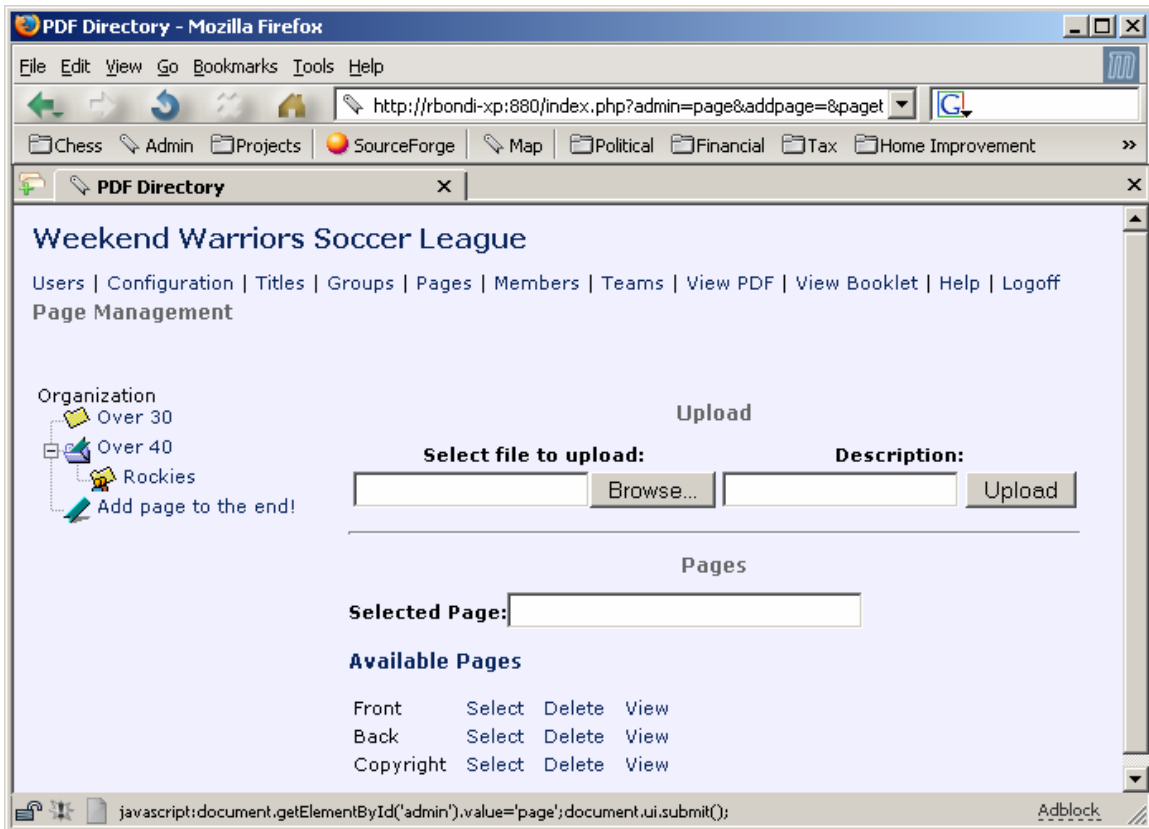
**Select** Pages from the menu.

# Add Custom Pages

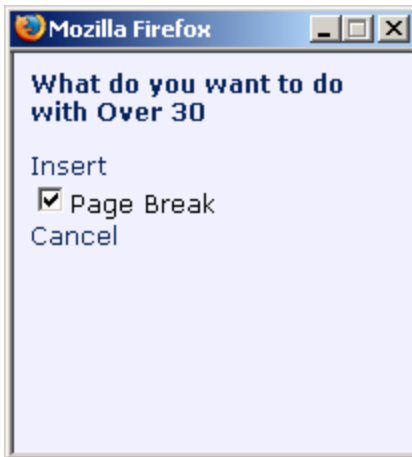


This interface has 3 sections. A tree to the left which outlines the structure of the document. Notice our Groups and our Team appears. This tree represents insertion points for the pages you create offline and upload. There is also an insertion point at the end, which would be your back cover. To the 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.



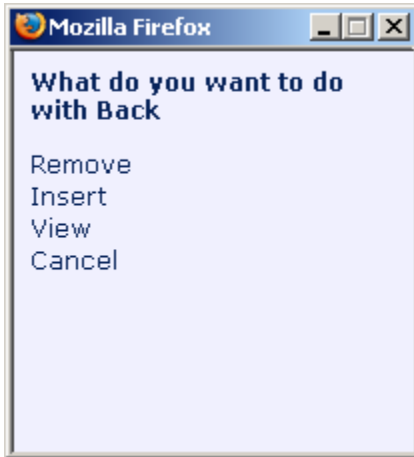
They are now available for insertion. To insert, **Select** the “Front” Page. It will appear in the **Pages** box. Now choose “Over 30” from the tree.



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 3<sup>rd</sup> 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](mailto:rbondi@users.sourceforge.net). Also welcome are your comments and suggestions.