

# PDF Directory Users Guide

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## **Introduction**

PDF Directory is an application for creation of a printable directory in PDF format. Uses could be for church groups, sports teams etc. Selected members of the organization can directly enter information on members, teams, clubs etc. Custom pages can be created offline, exported to PDF and uploaded to be included in the document. These pages will be combined with the auto-generated output from the database to create the final document.

### **Why use this application?**

Putting together a member directory for publication can be a time consuming chore. Typically, one person using a desktop application will design, format and enter information about their organization. This includes getting the information from other members of the organization and compiling that information into the final document. The exchange of information can be one of the most time consuming and frustrating aspects of this process. That is where PDF Directory comes in.

With PDF Directory, members who are in charge of a particular group, the same members from whom you would have to get the information with the previous method can directly enter information themselves. The application automates the generation of the document including the member information. The collaborative effort makes a shorter lead time possible without the headache and frustration.

### **What is required?**

This application is written in PHP which makes it platform independent. It has been tested on both Windows and Linux systems.

PHP must be compiled with MySQL and zlib support. It has been tested on several 4.3.x revisions.

MySQL database server and a web server that supports PHP are also required. Only Apache web server has been tested but others should work just fine.

## Installation

- 1) Download PDF Directory from: <http://sourceforge.net/projects/pdfdirectory/>
- 2) Extract files to desired location on the web server.
- 3) Create a database in MySQL. The default name is pdfdirectory. You can use any name as long as you modify the includes/config.php file.
- 4) Populate the database by executing the script sql/pfdirectory.sql. This creates the tables and a default logon of: admin admin for username and password. See MySQL documentation for details if you are unfamiliar with this process.
- 5) Modify includes/config.php. Database options default to no user/password. You will want to change this. Refer to MySQL documentation. Default page setup and language selection is also done here. See comments in this file for details.
- 6) Set write permission for the directories "temp" and "pages"(including subdirectories).

You should now be able to logon with the default admin logon of admin/admin.

If you wish to create your own language file put it in the languages directory and call it yourlanguage.inc. Modify the config file to read \$CFG\_LANG = 'yourlanguage'; without the .inc. Language files in this directory also appear as a selection automatically so you can also select this from within the application. Translations will be greatly appreciated so if you do this please forward to [rbondi@users.sourceforge.net](mailto:rbondi@users.sourceforge.net)

Please contact [rbondi@users.sourceforge.net](mailto:rbondi@users.sourceforge.net) with any installation problems.

## Getting Started

Once you have the system up and running, the next important decision is to decide how it will be managed. This product supports multiple organizations. One is created by default. If this is all you plan to use then you may skip this section. If not, you will have to decide if you want this to be open to the public or controlled privately.

If you decide to open this application up to the public on your site, you can modify the \$CFG\_FREEORG parameter in the includes/config.php file to true. Anyone coming to your site can click a link to create their workspace.

If you want to have control over who can work on this site you can do this with the default admin user account only. Other administrators can not access this. The admin user can navigate to the file neworg.php which is found at the root(<http://yourURL/neworg.php>). Here new organizations can be created. The administrator would have to inform their users of their logon so they can start to work in their workspace.

An example of how this would be implemented would be a sports recreation center. Let's say they have a soccer league, a baseball league and a basketball league. Although the term "organization" is used in this application, it really refers to one directory. In this example, the one organization, the recreation center has 3 leagues, each of which will publish their own directory. To implement this situation, the administrator would create 3 "organizations", one for each league.

## Administration

Once you have your organizations setup, the next step would be for the admin user of the organization to configure **Users**, **Titles** and **Groups**. If you wish to restrict users, it would be a good idea to start with **Groups** then **Users** because this will be required to have something to which you can restrict the **Users**.

### Users

These are the people who will be entering data into the system. They fall into 3 categories; **Admin**, **Global** and **Local**.

The **Admin** user has access to all configuration for their organization. The primary function of the **Admin** user is to assign users.

A **Global** user can perform all tasks except user administration.

A **Local** user will be restricted to a specific group. For example, you could have a **Local** user who would be assigned to the Under 10 soccer league. They would have access to only entering data for Under 10. They would have no access to Under 8 or Under 12 etc.

## User Assignment

To assign a user, select [Users](#) from the menu, enter a username and password and select one of the types described above. Then click the [Add New User](#) link. The user should now appear in the table of users. You will then have the options of [Update](#) | [Delete](#). Note that there must be at least one **Admin** account so if there is only one, the [Delete](#) option will not be shown.

## User Restrictions

If you wish to create a user of type **Local**, it would be a good idea to jump ahead to *Group Assignment* and create the **Groups** first. Once **Groups** are assigned and a **Local** user is created, that user will have additional options to select and add **Groups** to the user. Select a **Group** from the drop down list and click the [Add](#) link. You can add as many **Groups** as you like for a user. Adding a Group gives the user access to everything in that group and below. For example if you have a user assigned to U-10 which has two Division s, A and B, by Assigning the user to U-10, they would also have access to Division s A and B. If you then try to assign Division A, nothing will happen because they already have access. Now if you did it the other way around, and assigned a user to Division A, the later added U-10, you would see Division A removed from the list and replaced by U-10 which includes Division A.

## Configuration

This can be done by **Admin** or **Global** users. The following fields are provided from the [Configuration](#) link:

*Name:* This is the name of the organization. It will appear on the top of each page of the user interface.

*Language:* All text(once language files are complete and updated) will appear in the user interface in the selected language.

*Orientation:* You currently can only choose *Portrait*.

*Units:* This applies to settings such as width, height and margins.

*point:* This represents 72 points per inch.

*inch:* Settings expressed in inches.

*millimeter:* Settings expressed in millimeters.

*centimeter*: Settings expressed in centimeters.

*Height, Width, Margins and Gutter*: These settings are entered in the Units selected above. Gutter is the term for the gap between the opposing pages where they would be bound. Print on the left side pages will be shifted left and on right side pages will be shifted right by this amount to accommodate the binding.

*Phone Format*: This is for localization. The n represents numeric digits. All else will be stored as shown in this field. If it does not match this format, it will be stored exactly as entered. For example with a format of (nnn) nnn-nnnn you entered a number of 1112223333 it would be stored as (111) 222-3333.

*Template*: This gives some flexibility as to how the member data will be formatted on a page. The templates are currently PHP code but some time in the future this could be upgraded to something more user friendly.

*Team Break*: If set to true, if a **Team** does not fit on a page of the PDF document, a new page will be added automatically. If you have very large **Teams**, you may want to set this to false to allow a **Team** to be split across pages.

*TOC Page*: This is where the table of contents is to be inserted. A value of 1 would mean that the TOC would appear on the front cover(usually not desirable), 2 would mean the inside of the front cover etc.

## **Titles**

**Titles** are grouped together for a type of team. ex. Board of Directors(Chairman, Secretary, Treasurer). They will need to be assigned before creating teams. The **Titles** will appear in the final publication for the team members.

To Enter **Titles** select [Titles](#) from the menu. Once in the **Titles** section you can begin by assigning a **Title Type** which is merely a name for a group of **Titles**. Do so by typing in a name that you wish to assign to this **Type** and select [New Title Type](#) ".

Titles can be assigned to each Type by filling in the box and selecting [New Title](#) under the appropriate Type. To update a **Title** once created, make changes in the box and choose [Update](#). If a **Title** is not already assigned to a team member, an option will appear to delete it. Also, **Titles** have a priority. Once more than one **Title** is inserted, they can be re-ordered by moving upward by selecting the [^](#) link. All **Title Types** will be created with an empty selection to allow for untitled team members.

## **Groups**

You can start by adding a **Group** at the root level by going to the [Groups](#) section, filling in the box and selecting [Add Root Level Group](#). An example of this would be our U-10

in our previous soccer league example. Once a group is created, sub groups can be created in a similar manner by filling in the box and clicking [Add Group in Groupname](#). In our soccer example, the Division A is a **Group** that belongs to U-10. All **Groups** can be updated or deleted(if nothing assigned to it) as with the **Titles**.

## Pages

**Pages** can be inserted into the document at the desired location. Only offline created, uploaded PDF files are supported at this time. The first step would be to create a page in your favorite word processor. It would be desirable to configure the pages in the word processor to the same configuration as the "Directory" that you are creating online.

Once you have a **Page** created and exported to PDF, you can upload it by going to the [Pages](#) section and using the Browse Button to select the file, fill in a description which will help you identify the page for placement in the document, and pressing the Upload button. Once uploaded, a list of available **Pages** appears. You have [Select](#) [Delete](#) [View](#) options for a **Page**.

To add the **Page** to the document, select the page from the list, then choose a location in the tree where you wish to insert it. The insertion is always before the selected location. Insertion before a **Team** is automatic when selecting a **Team** from the tree. When selecting a **Group** from the tree, you will have an additional option of weather that **Group** will have a page break. All **Groups** will have a page break by default.

Once **Pages** are inserted, you will have the option of removing it from the document or inserting another **Page** before it. When selected from the tree, a popup of options will be displayed. If you remove a **Page** it will now be available for re-insertion at another location or deleted from the system.

For Windows users, you can get PDFCreator from:

<http://sourceforge.net/projects/pdfcreator/> which is a print driver that will output PDF.

Cross platform PDF creation is available from Open Office at:

<http://www.openoffice.org/>

Note that unless you are using software that creates and reads PDF documents directly you will need to keep your original Word Processor document in it's own format.



## Local Users

These are restricted user accounts. The access is limited to **Member** entry and assigning **Members** to **Teams**. They are also limited by the Administrator to where **Teams** can be assigned. The Local User can access all **Members** for the Organization however they will not be able to delete **Members** who are already assigned to a **Team**.

## Members

Go to the [Members](#) section in fill in the blanks and hit the Enter Button. Once **Members** are entered they can be modified by searching by last name (partial ok) and selecting [Edit](#) from the list of results. To search all members use the % symbol. If a **Member** is not assigned to a **Team**, the [Delete](#) option will be presented.

## Teams

You may add a **Team** in the [Teams](#) section by filling in the name and selecting the **Titles** created earlier by an Admin or a Global user. This will appear in the first row and at the very right it will tell you where you are adding the team. If you wish to add to another **Group**, they should now appear at the bottom. Select the desired **Group** and create teams.

Once **Teams** are created, you can now add **Members**. First search for a **Member** by last name. For all **Members** enter the % symbol. All matches will appear in a drop-down selection. Also a selection will appear with the list of all **Teams** in the **Group**. Select a **Team** and you will have the appropriate selection of Titles for that **Team**. Select the appropriate **Title** for the **Member** and choose "add".

## PDF Documents

PDF Documents can be generated in one of 2 formats. The standard PDF format would require that there be an even number of pages before printing. For viewing only, this is not required. The other format is the "Booklet" format. This is for printing two pages per sheet on each side. This requires the number of pages divisible by 4. You can easily tell if you need to insert or delete one or more pages before printing by looking at the standard PDF format document.

## Credits

This package was created by Richard Bondi [rbondi@users.sourceforge.net](mailto:rbondi@users.sourceforge.net). It could not have been accomplished without the availability of some really great open source libraries and products or without the help of the translators.

### Open Source libraries

FPDF by Olivier Plathey at <http://www.fpdf.org>

FPDI by Jan Slabon at <http://fpdi.setasign.de/>

PHP Layaer Menu by Marco Pratesi at <http://phplayersmenu.sourceforge.net/>

Upload Class by C.Small at [sloppycode.net](http://sloppycode.net)

Additional thanks to Slava Pestov for the terrific jEdit <http://jedit.org> editor which was used to create this project and to Sourceforge <http://sourceforge.net> for hosting this project.

### Translations

Bulgarian translated by Nikolay Damianov

Dutch translated by Niels Timmer(a.k.a. Spike)

German translated by Robert Metzger

Hebrew translated by Yotam Rabinerson

Italian translated by Tara Kelly (a.k.a. katydid)

Russian translated by Cyrill Gorcunov

Spanish translated by Martha Bondi

### TODO:

- User preferences, change password
- Localization(date, phone)
- Ability to re-order groups and teams
- Config option for field selection
- Audit trail
- User definable fields
- Make more modular to include with other apps
- Integrated editor for custom pages.